

# THE ENHANCED EBOOK:

Its Past, Present, and Future Place in the North American Publishing Industry

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Project Submitted in Partial Fulfillment of the Requirements for the Degree of

**Master of Publishing  
in the Publishing Program  
Faculty of Communication, Art and Technology**

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SIMON FRASER UNIVERSITY

Fall 2020

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## ABSTRACT

The enhanced ebook format—an ebook featuring multimedia elements such as audio, video, and animations—was released in 2010, yet it has been largely unused. Despite its potential, only 23% of publishers in Canada produced an enhanced ebook each year between 2014 and 2017.<sup>1</sup> The format can excel in the scholarly/professional, trade/consumer, and educational/K to 12 marketplaces; however, it is held back by the same hurdles that halted its progress in 2010. Poor retailer and device support, lack of classification and discoverability, slow consumer adoption, and caution from publishers to invest were, and still are, roadblocks that inhibit the enhanced ebook format from gaining popularity. In an effort to understand why the enhanced ebook format has not gained traction, this report will assess the enhanced ebook format, and its past, present, and future place in the North American publishing industry.

**Keywords:** Enhanced ebook, basic ebook, North American publishing industry, educational publishing, K to 12 publishing

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<sup>1</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

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## INTRODUCTION

When the enhanced ebook first debuted in 2010, the format seemed to overflow with potential. Publishers were excited to add audio, video, animations, and more to their ebooks and attract customers like moths to a flame. Ten years later, enhanced ebooks have not gained the momentum that inspired publishers' dreams. Yet the simple ebook, the format touted as the "Future Book" at the time of its release,<sup>1</sup> has remained prolific as the preferred ebook format for publishers in the North American publishing industry. The rising consumer demand for multimedia content across the entertainment industry had the potential to translate into more acceptance and usage of the enhanced ebook format, but Canadian publishers' production rates have not increased between 2014 and 2017.<sup>2</sup> If consumer demand for multimedia content is growing, the question remains: what is keeping the enhanced ebook format from rising in popularity?

The enhanced ebook is still an unfamiliar concept for many consumers. Multimedia features such as audio, video, interactive images, scripted animations, and read-aloud functionality are known elements, but they are often associated with other entertainment and digital mediums. Despite its position as a bridge between "regular" ebooks and common online HTML-based content, the enhanced ebook format has remained in relative obscurity. Almost-insurmountable blockades that stunted the format's growth in its formative years are still a concern, and the industry has yet to sufficiently address them:

1. The most popular North American ebook retailers and devices differ on their support of the format (including Amazon and its Kindle, Apple iBooks and its iPad, Kobo and its e-readers, Barnes & Noble and its Nook, and Google Play Books);
2. It is cost-prohibitive to produce;
3. Consumers are largely unaware the format exists; and
4. Its lack of market penetration still invokes caution in most publishers.

Regardless, the enhanced ebook format is starting to gain a footing. "The State of Digital Publishing in Canada 2017," a report by BookNet Canada displaying the industry's use of the format between 2014 and 2017, shows a steady percentage of publishers creating enhanced ebooks.<sup>3</sup> In 2017, 55% of those publishers also reported a positive impact on their sales due to their efforts.<sup>4</sup> Overall, the report shows three significant marketplaces currently housing enhanced ebooks: scholarly/professional, trade/consumer, and educational/K to 12. While each marketplace has the potential to be highly successful, the educational/K to 12 marketplace holds the opportunity to secure a loyal consumer base and potentially act as a catalyst to entice other market segments to adopt the enhanced format.

However, there are significant roadblocks to success that need to be resolved for the enhanced ebook format to secure a significant market share. In order to evaluate the enhanced ebooks' potential place in tomorrow's North American publishing industry, an analysis of the format, its troubled introduction, as well as its place in today's publishing landscape is required.

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<sup>1</sup> Craig Mod, "The 'Future Book' Is Here, but It's Not What We Expected."

<sup>2</sup> BookNet Canada, "The State of Digital Publishing in Canada 2017."

<sup>3</sup> BookNet Canada, "The State of Digital Publishing in Canada 2017."

<sup>4</sup> BookNet Canada, "The State of Digital Publishing in Canada 2017."

## THE ENHANCED EBOOK FORMAT

Though the ebook is a recognized format, the term “enhanced ebook” is still unfamiliar in most circles. Therefore, a comprehensive definition of the enhanced ebook format and how it differs from a “regular” ebook is essential before undergoing any analysis of its place in the industry.

### What is an Enhanced eBook?

The enhanced ebook is a product of the EPUB3 update. Before the EPUB3 was introduced in 2010, publishers were using the EPUB2 and MOBI formats to create ebooks.<sup>5</sup> Introduced in 2007, the HTML-based EPUB2 format included very basic text and layout capabilities.<sup>6</sup> Regardless, it gained popularity and soon became the industry standard for retailers with the exception of Amazon who preferred Kindle-based formats (e.g., MOBI).<sup>7</sup> The EPUB2 format may have had a limited capacity for formatting and layout,<sup>8</sup> but it met the original purpose of presenting text-heavy trade books in a digital format. However, its creators, the International Digital Publishers Forum (IDPF), “continued to look at ways to improve the EPUB format.”<sup>9</sup> As a result, the EPUB3 update was released in 2010.<sup>10</sup> Though it was still HTML-based, it introduced capabilities from HTML5, which opened the doors to add “improved navigation...[,] media (a.k.a. video and audio) as well as scripting...[,] more sophisticated metadata...[,] fixed-format ebooks[, and] backward compatibility.”<sup>11</sup> Out of these new abilities, the most distinguishing feature of the EPUB3 format was the ability to include audio, video, and JavaScript scripting.<sup>12</sup> Specifically, the introduction of JavaScript scripting allowed for cause-and-effect interactions in ebooks.<sup>13</sup> For the first time, publishers could add triggers to create effects in their ebooks, such as timed animations and audio clips or pop-up definitions. The combination of audio, video, and JavaScript capabilities led to the creation of the “enhanced” ebook format.

### How Does it Differ from a Basic eBook?

A common way to define an enhanced ebook is to claim it is “interactive.” Unfortunately, this term is rather broad, and, at its core, it can be used to describe the more well-known ebook format as well. For instance, a “regular” ebook’s fundamental purpose is to be a simple digital replication of the printed material.<sup>14</sup> Users then read and engage with the titles, be it by tapping, swiping, or scrolling to flip the pages; highlighting an important passage of a text; searching for a keyword; clicking on hyperlinks; etc. One could argue that any of the tapping, swiping, scrolling, highlighting, searching, and/or clicking is a form of interaction with the text, which makes “interactive” a less-than-ideal way to differentiate the ebook formats. However, if the “regular” ebook (subsequently referred to as a basic ebook) is stripped back to its original intention, a key difference between the basic ebook and the enhanced ebook becomes clear: while the basic ebook is a digital replication,<sup>15</sup> an enhanced ebook is a multimedia (re)production of the original printed

<sup>5</sup> Government Book Talk, “The History of EBooks from 1930’s ‘Readies’ to Today’s GPO EBook Services.”

<sup>6</sup> Dave Cramer, “EPUB History 101: Evolution and Revolution.”; David Kudler, “Fun with Formats, Part I: EPub2 vs. EPub3.”

<sup>7</sup> Dave Cramer, “EPUB History 101: Evolution and Revolution.”; David Kudler, “Fun with Formats, Part I: EPub2 vs. EPub3.”

<sup>8</sup> David Kudler, “Fun with Formats, Part I: EPub2 vs. EPub3.”

<sup>9</sup> David Kudler, “Fun with Formats, Part I: EPub2 vs. EPub3.”

<sup>10</sup> David Kudler, “Fun with Formats, Part I: EPub2 vs. EPub3.”

<sup>11</sup> David Kudler, “Fun with Formats, Part I: EPub2 vs. EPub3.”

<sup>12</sup> David Kudler, “Fun with Formats, Part I: EPub2 vs. EPub3.”

<sup>13</sup> Zellwk, “The Difference between HTML, CSS, and JavaScript.”

<sup>14</sup> Lee LeFever, “What Is an ‘Enhanced’ EBook?”

<sup>15</sup> Lee LeFever, “What Is an ‘Enhanced’ EBook?”



material.<sup>16</sup> When compared to other multimedia formats, the enhanced ebook is a marriage between a basic ebook, magazine-style audio and video treatment, and video-game levels of engagement with the user. Though both basic and enhanced ebook formats could be created using EPUB3 technology, it is how they are produced and the elements they integrate into the file that determine their classification. Figure 1 lists popular enhancements used in enhanced ebooks and compares the features to those seen in a basic ebook.

Features	Basic eBook	Enhanced eBook
Text	✓	✓
Static images	✓	✓
Audio		✓
Video		✓
Gifs		✓
3D images		✓
Scripted animations		✓
Interactive images		✓
Read-aloud functionality	✓*	✓
Slideshows		✓
Pop-up windows		✓
Responsive quizzes, activities, and games		✓
Web HTML		✓
Widgets		✓
Scenario-based navigation		✓

\* The read-aloud capability for the basic ebook format is only available in accessible basic ebooks, and the feature is often only accessible if the e-reader supports the text-to-speech function and/or is paired with additional software that supports the function.<sup>17</sup>

Figure 1: A list of popular features available for use in the basic ebook and enhanced ebook formats.

## THE ENHANCED EBOOK'S PLACE IN YESTERDAY'S PUBLISHING MARKET

After the enhanced ebook format's introduction in the early 2010s, the industry soon recognized benefits and drawbacks that were inherent to the format. These features helped determine what content best suited the format, who was in the best position to create them, and what needed to be kept in mind during the production and distribution process. These unique characteristics also contributed to roadblocks that led to the format's lackluster debut.

<sup>16</sup> Lee LeFever, "What Is an 'Enhanced' eBook?"

<sup>17</sup> University of Waterloo, "Accessibility and Ebooks."

## The Benefits of the Enhanced eBook

Compared to basic ebooks, the enhanced ebook stands out for its capacity to integrate rich media from its HTML base as well as user engagement through JavaScript coding.<sup>18</sup> Pulling from its HTML roots and new JavaScript capabilities, the enhanced ebook offers a bridge between basic ebooks and more complex web functionality. Its HTML and Javascript base also allows publishers to tailor their enhanced ebooks with features that supplement and enrich content in specific genres, such as higher education textbooks, how-to instructional books, cookbooks, and more.

For example, in 2010 Duarte Press LLC published *Resonate: Present Visual Stories That Transform Audiences* by Nancy Duarte about “leveraging techniques normally reserved for cinema and literature...to transform any presentation into an engaging journey.”<sup>19</sup> Duarte Press LLC took the basic text from *Resonate* and tailored its presentation in the enhanced ebook format to optimize its impact on readers. Marketed as a “multi touch book,” *Resonate* included “the full menu of enhanced ebook options, from audio and video, to interactive quizzes, graphs[,] and behind-the-scenes content.”<sup>20</sup> They even dedicated a page to detailing how to use the book for people unfamiliar with the enhanced capabilities (see Figure 2).

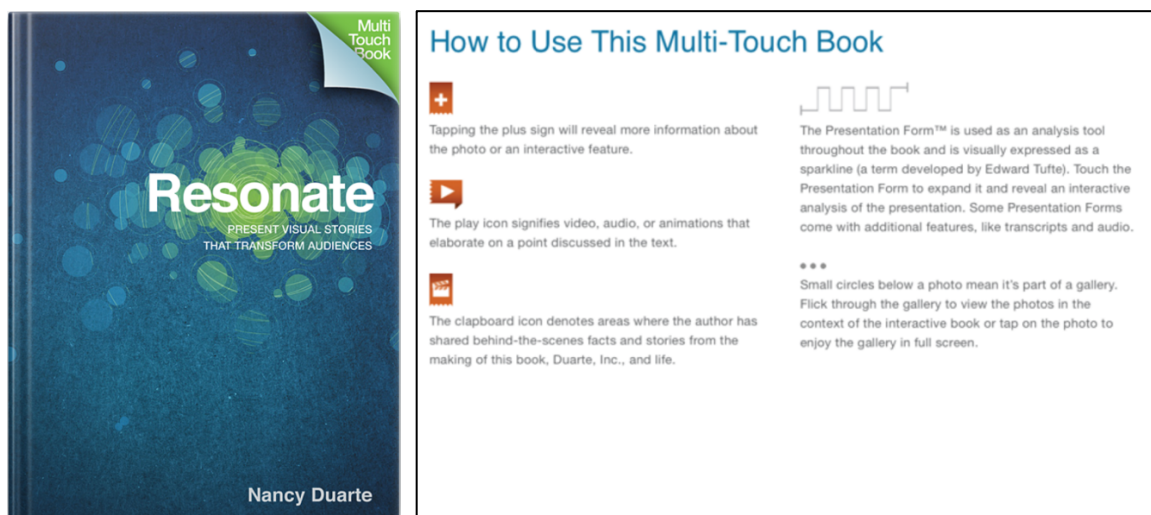


Figure 2: Front cover of *Resonate* by Nancy Duarte (left) and interior page detailing the enhancements in the book and how to use them (right).<sup>21</sup>

## The Drawbacks of the Enhanced eBook

Unfortunately, while the format introduced several key benefits, there were also staggering drawbacks. For one, the features included in enhanced ebooks almost guaranteed high production costs. Any publisher that included audio, video, or a combination thereof in their enhanced ebook would likely have to produce the audio or video content as well. This could include renting a studio space; hiring the talent (e.g., voice actors); recording the audio and/or video; and editing the content. These costs would then be compounded with the basic cost of producing the enhanced ebook (e.g., the time and labour to create the layout, typesetting the document, linking the enhanced features, etc.). As

<sup>18</sup> Bill McCoy, “9 Things You Need to Know About EPub3.”

<sup>19</sup> Nancy Duarte, *Resonate, Present Visual Stories That Transform Audiences*.

<sup>20</sup> Lee LeFever, “What Is an ‘Enhanced’ EBook?”

<sup>21</sup> Nancy Duarte, *Resonate, Present Visual Stories That Transform Audiences*.

publishers often work on fine margins, the high production costs associated with enhanced ebooks alone forced the format out of the realm of possibility for many publishers.<sup>22</sup>

In addition, the broad skill set required to create an enhanced ebook in the early 2010s would have been its own impediment; extensive HTML5, CSS, and JavaScript coding experience paired with a talent for book design and a strong knowledge of book publishing practices would have been required. Finding a qualified individual would have been tough—and very costly—within the publishing industry, and manually crafting each title would have required additional time beyond the production schedule for the basic ebook. To determine the format’s viability, publishing houses would have had to evaluate each title separately, similar to how titles are now evaluated for the audiobook format. The final quote for an enhanced ebook would vary from title to title, since each ebook would include different enhancement treatments, page counts, and in-house publisher resources. As a result of the costly production requirements, many publishers decided to forego the enhanced format and invest their time and money into the widely accepted and cost-effective basic ebook instead.

Beyond its high production costs, the enhanced ebook format was also initially restricted to the EPUB3 format. Unfortunately, complex EPUB3 files, such as those with extensive formatting, rich media, or enhancements, could not and still cannot be successfully distributed through Amazon. In 2012, Amazon responded to the advanced EPUB3 format with a new proprietary format: KF8. Though this format can integrate audio and video, the format failed to compete against EPUB3’s extensive enhancement capabilities and is mostly used as a medium for basic ebooks (see Figure 1 for a comparison of features seen in basic ebooks and enhancement ebooks).

The enhanced ebook also faced another important format limitation: the decision to use a reflowable versus a fixed-layout structure. A reflowable ebook, often seen with text-heavy genres, creates a responsive environment where the text and images can be manipulated to increase the font size, change the font entirely, and adjust the background colour.<sup>23</sup> A fixed-layout ebook operates similarly to a PDF by locking all of the design features and text in place when it is exported and thus loses the flexibility seen in the reflowable layout.<sup>24</sup> From a design standpoint, the enhanced ebook is best suited to the fixed layout rather than the reflowable layout, because the fixed layout enables book designers to have complete control over the design of a spread and the linked enhancements. It is possible to create a simple enhanced ebook using the reflowable layout; however, the unpredictability of the reflowable structure creates an extremely difficult design challenge for any complex enhanced ebook. There are also some enhancements that are only possible with a fixed layout, such as the read-aloud feature that highlights the text as a passage is read.<sup>25</sup> To simplify production and the overall process, most enhanced ebooks are prepared in a fixed layout.<sup>26</sup> Unfortunately, this strongly disadvantages the enhanced ebook format, since the fixed layout is inherently less accessible than the reflowable layout prevalent in basic ebooks.

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<sup>22</sup> Dave Cramer, “EPUB History 101: Evolution and Revolution.”

<sup>23</sup> Kotobee, “Best Ebook Layout Format: Reflowable or Fixed?”

<sup>24</sup> Kotobee, “Best Ebook Layout Format: Reflowable or Fixed?”

<sup>25</sup> Digital Publishing Hub, “Enhancing an EBook with Interactivity, Multimedia and Animation.”

<sup>26</sup> Kotobee, “How to Create an Interactive Enhanced Ebook: A Step-by-Step Guide.”

## A Lackluster Debut

From a consumer perspective, an ebook containing audio, video, animations, and/or other enhancements may appear like a “new and improved” version of the average ebook. However, these features—and thus the enhanced ebook format—have been available since the basic ebook rose in popularity in the early 2010s. While publishers and retailers alike watched basic ebook sales skyrocket, the enhanced ebook format seemed to falter in its wake. Working with limited budgets, publishers were not confident in the enhanced ebooks’ viability compared to the successful market testing of the basic ebook. As market patterns emerged, publishers found that romance, crime, and thrillers were very successful genres for ebooks.<sup>27</sup> However, these genres are quite text heavy and plotline-focused, meaning that any introduction of audio, video, animations, and the like would be prone to distracting readers from the storyline. Acknowledging that enhanced ebooks are better suited to genres that have not proven as successful in the ebook format, such as educational, non-fiction, and K to 12 titles, publishers were unsure of the format’s market potential. From industry thought-leaders decrying the enhanced ebook format to retailers and devices not supporting all of the enhancements, several obstacles led to the format having a lackluster debut.

### Retailer & Device Support Not Guaranteed

Retailers and devices have always differed on the enhancements they supported. In 2010, the most popular ebook retailers across North America were Amazon, Barnes & Noble’s eBookStore, Kobo, Apple iBooks, and Google’s eBookstore. Amazon, a leader in ebook sales after the Kindle was released in 2007,<sup>28</sup> only supported Kindle formats. The only Kindle format available at the time, MOBI, did not and currently still does not support any enhancement. The newer KF8 format introduced in 2012<sup>29</sup> supports embedded audio and video, but no other enhanced functions.<sup>30</sup> The “improved” KF8 format also had its own limitations, since it was only compatible with second-generation-and-later Fire tablets, iPhones, iPads, and iPod touches.<sup>31</sup> Kindle e-reader devices, whose market saturation grew to approximately half of the adults in the United States of America (U.S.) by 2019,<sup>32</sup> did not support audio or video content,<sup>33</sup> further limiting the market scope of the enhanced ebook.

Barnes & Noble (B&N) set out to compete against the fast-growing ebook retailer, Amazon, with their eBookstore in 2009.<sup>34</sup> As B&N’s eBookstore gained over one million ebooks and over 20% of the ebook market share within a year of its launch, B&N seemed to be gaining traction.<sup>35</sup> Their popular e-reader, Nook, was also making waves and their subsequent tablet release in late 2010, the Nook Color, was a soaring success with millions sold leading up to the 2010 holiday season.<sup>36</sup> Lamentably, B&N’s devices were inconsistent in their enhancement support: the Nook tablet devices could support audio and video enhancements, but their e-ink e-readers could not.<sup>37</sup>

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<sup>27</sup> Lucy Handley, “Physical Books Still Outsell E-Books — and Here’s Why.”

<sup>28</sup> Daniele Palumbo, “Amazon at 25: The Story of a Giant.”

<sup>29</sup> Chris Velazco, “Updated Kindle Android App Supports KF8 Files (Which Means More Pretty Pictures).”

<sup>30</sup> Monica Dube, “Interactive Ebooks: What Are They and How to Make Them.”; Digital Publishing 101, “EPUB and Kindle Formats Explained.”

<sup>31</sup> Kindle Direct Publishing, “Creating Kindle Editions with Audio/Video Content.”

<sup>32</sup> Pew Research Center, “Mobile Fact Sheet.”

<sup>33</sup> Kindle Direct Publishing, “Creating Kindle Editions with Audio/Video Content.”

<sup>34</sup> Jim Milliot, “Barnes & Noble Launches E-Book Store.”

<sup>35</sup> Michael Kozlowski, “The History of the Barnes and Noble Nook and Ebook Ecosystem.”

<sup>36</sup> Michael Kozlowski, “The History of the Barnes and Noble Nook and Ebook Ecosystem.”

<sup>37</sup> eBook Partnership, “Creating Enhanced eBooks.”

As B&N was investing heavily into the ebook and e-reader markets, Kobo was bursting onto the Canadian publishing scene in 2009. Co-founded with Indigo CEO Heather Reisman and with backing from Borders and its Australian counterpart, Kobo had tremendous support at its launch.<sup>38</sup> Kobo's first e-reader was released in May 2010 followed closely in October 2010 by a Wi-Fi-enabled e-reader that went on to become the first e-reader promoted in Canada.<sup>39</sup> In the first year after its debut, Kobo had amassed over \$100 million in sales and was gaining international attention.<sup>40</sup> Despite Kobo's successful beginning, they did not embrace enhanced ebooks across the board. Publishers were able to sell their enhanced ebooks in their online store with full enhancements, yet their widely successful e-ink e-readers were not built to host enhanced ebooks.

Introduced in April 2010, Apple iBooks also intended to directly compete against Amazon for ebook sales.<sup>41</sup> Released in conjunction with Apple iBooks, Apple launched the iPad tablet to a receptive audience and reportedly sold 7.5 million units by October 2010.<sup>42</sup> Luckily, where Amazon did not support any enhancements until 2012, iBooks and the Apple device family (iPad, iPhone, and iPod Touch) have always supported all enhanced ebook capabilities.<sup>43</sup> The tablet had the ability to open ebooks with any enhancement in the iBooks app, as well as download other e-reader apps that gave their users access to Kindle, Kobo, and Google's eBookstore titles. However, iBooks was not as successful as publishers had hoped in wrangling ebook market shares away from a well-established Amazon. As a result, Amazon held the larger market share of ebook sales, and as of 2020 Amazon handles 89% of ebook sales in the U.S.<sup>44</sup>

Google's eBookstore was introduced last out of the previous ebook retailers in late 2010, and its start was riddled with difficulties.<sup>45</sup> Its 3 million ebook catalogue and successful parent company should have almost guaranteed a promising launch, but the digital retailer did not take off as well as its Amazon, B&N, Kobo, and Apple competitors.<sup>46</sup> Faced with a lack of consumer awareness, insufficient promotional support by its parent company, and poor support by indie retailers, Google's eBookstore folded into the new cloud-based Google Play brand as Google Play Books in 2012.<sup>47</sup> After the re-launch, Google Play Books followed the same vein as Amazon by supporting audio and video ebook features, but no "interactive functionality such as that enhanced by JavaScript code."<sup>48</sup> In comparison with the other popular ebook retailers, Google never released an e-reader and chose to sell ebooks that could be read on a wide range of devices. Instead, Google focused on their cloud-based software to provide a seamless reading experience for users to begin their book on one device and continue it on another.<sup>49</sup>

### Lack of Classification, Lack of Discoverability

The lack of consistent retail and device support was only the first hurdle that the enhanced ebook format faced; the format also had to contend with a general lack of classification and discoverability across the publishing industry.

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<sup>38</sup> Michael Kozlowski, "The History of Kobo and How They Changed the E-Reader Market."

<sup>39</sup> Michael Kozlowski, "The History of Kobo and How They Changed the E-Reader Market."

<sup>40</sup> Michael Kozlowski, "The History of Kobo and How They Changed the E-Reader Market."

<sup>41</sup> Constance Grady, "The 2010s Were Supposed to Bring the Ebook Revolution. It Never Quite Came."

<sup>42</sup> Julie Bosman, "Google Opens Doors to E-Bookstore."

<sup>43</sup> Monica Dube, "Interactive Ebooks: What Are They and How to Make Them."

<sup>44</sup> Daniele Palumbo, "Amazon at 25: The Story of a Giant."

<sup>45</sup> Macy Halford, "The Google eBookstore: Mostly Good, a Little Bad."

<sup>46</sup> Macy Halford, "The Google eBookstore: Mostly Good, a Little Bad."

<sup>47</sup> Calvin Reid, "With End of Retailer Program, Google Rebrands Its Digital Content Under Google Play."

<sup>48</sup> Google Play Books Help, "EPUB Files."

<sup>49</sup> Calvin Reid, "With End of Retailer Program, Google Rebrands Its Digital Content Under Google Play."

When enhanced ebooks were first introduced, there was little differentiation between the basic and the enhanced formats. The ebook format in general was still in its infancy, and publishers, retailers and consumers had only just begun to familiarize themselves with the concept. Unfortunately, the lack of clarity and consistency across all players in the supply chain resulted in mixed messages and missed opportunities.

Publishers and retailers focused their marketing efforts on the general ebook format and failed to distinguish between the basic and enhanced versions. Every ebook gained the “interactive” label—one of the more instinctive descriptions for the enhanced ebook format—and when publishers tried to differentiate their basic and enhanced ebook titles, the word had lost its meaning for consumers.<sup>50</sup> Without a clear-cut distinction between a basic ebook and an enhanced ebook, publishers, retailers and consumers alike were unable to classify what they were making, selling, or purchasing. Moreover, since the marketing had not successfully outlined how the two formats differed, consumers were largely unaware that the enhanced format existed and could be considered as a separate format. The 2011 London Book Fair’s Digital Conference agreed, stating that “discoverability [was] the most important issue facing e-book vendors.”<sup>51</sup> In combination with the low consumer awareness, the resulting lack of discoverability and poor sales encouraged publishers to focus on the more successful basic ebook format and to leave its advanced counterpart, the enhanced ebook, in the dust.

### Slow Consumer Adoption

As a result of the low discoverability and awareness, consumers were slow to adopt the enhanced ebook format. In general, the ebook was still a new concept, and the lack of marketing support and social awareness for the enhanced ebook format decreased its market reach. The enhanced format was also more expensive than its basic ebook counterpart, which acted as a deterrent for some customers.<sup>52</sup> Regardless, there was a niche segment of the market aware of the enhanced format. In general, these consumers were of two minds: either the new features had enhanced the ebook and were worth the extra money, or they distracted from the text and did not add any value.<sup>53</sup> Though it was not the resounding success of the basic ebook, there was clearly a small segment of early adopters that embraced the enhanced format. Unfortunately, as publishers began to focus on the basic ebook format, the decrease in enhanced ebook production and lack of marketing support hindered the format from attracting new readers and drastically decreased the market segment’s growth.

### Caution in the Publishing Industry

Publishers were tremendously wary when the ebook concept was first introduced. Tales of frightening sales projections—where publishers and retailers would lose more than half of their print sales to the new digital format—were the norm.<sup>54</sup> Regrettably, this festering fear led to extreme caution by many publishers when the basic ebook format began attracting consumer attention. Most publishers were so uncertain of the future of publishing and their own survival in the new digital landscape that they were largely unwilling to risk investing in the even-more-unknown enhanced ebook format.<sup>55</sup> Publishers were also unsure about whether there was a clear consumer demand: Jane

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<sup>50</sup> Monica Dube, “Interactive Ebooks: What Are They and How to Make Them.”

<sup>51</sup> Philip Jones, “Time Called on Enhanced E-Books at LBF Digital Conference.”

<sup>52</sup> Jennifer Bergen, “E Is for Enhanced: 8 Enhanced Ebooks Worth Checking Out.”

<sup>53</sup> Jennifer Bergen, “E Is for Enhanced: 8 Enhanced Ebooks Worth Checking Out.”

<sup>54</sup> Constance Grady, “The 2010s Were Supposed to Bring the Ebook Revolution. It Never Quite Came.”

<sup>55</sup> Dave Cramer, “EPUB History 101: Evolution and Revolution.”; Bill McCoy, “9 Things You Need to Know About EPUB3.”

Friedman, CEO and co-founder of Open Road Integrated Media and former CEO of HarperCollins, stated, “The consumer did not ask for this. It takes [the ebook] from being a reading experience to something else, and we are publishers.”<sup>56</sup>

However, not all publishers avoided the enhanced ebook format. In fact, Penguin collaborated with Apple iBooks in 2010 to release enhanced ebooks in the new ebook retail store.<sup>57</sup> The partnership proved rather successful according to the initial earnings report, which showed Penguin as the highest earning publisher in the iBooks store with 23.5% of all retailer earnings attributed to Penguin’s ebook catalogue.<sup>58</sup> Penguin went on to release 35 enhanced titles in 2011 and grew their list to 50 in 2012.<sup>59</sup> Other large publishers followed in their footsteps as Simon & Schuster (S&S) planned for almost 60 enhanced titles in 2012 with Knopf and Random House right behind them.<sup>60</sup> By 2012, big players in the North American publishing industry seemed to be getting on board with the format. That said, Penguin, S&S, Knopf, and Random House were large publishers with deep pockets and a vast array of resources at their fingertips. In comparison, most other publishers, especially small or medium-sized publishers, likely did not have the financial capital to invest in this outwardly risky venture. Not to mention, the production of the enhanced ebook format required skills and expertise that were not common in the publishing industry at the time.<sup>61</sup> When Evan Schnittman, industry thought-leader and later executive vice president and chief marketing and sales officer of Hachette Book Group, declared that “enhanced ebooks and apps [are] essentially dead and a non-starter for publishers” at the 2011 London Book Fair,<sup>62</sup> many publishers’ decision to hold off on investing into enhanced ebooks was ostensibly validated.

## THE ENHANCED EBOOK’S PLACE IN TODAY’S PUBLISHING MARKET

Despite its bumpy introduction, the enhanced ebook format is being produced, distributed, and sold in today’s North American publishing industry. BookNet Canada, a non-profit organization that provides software, standards, research, and education for the Canadian publishing industry, has monitored the progression of the enhanced ebook format since the mid 2010s. Though the statistics are specific to Canada, the American and Canadian entertainment industries are often considered mirrors of each other.<sup>63</sup> Combined with the 2011 and 2012 figures from large U.S. publishers and the common understanding that the American publishing industry is approximately ten times larger based on population size, the BookNet Canada statistics can be used to extrapolate an estimate of how all North American publishers are producing and selling enhanced ebooks. An in-depth look into BookNet Canada’s study coupled with an analysis of the format’s initial obstacles to success reveals how publishers and the larger North American publishing industry have utilized the enhanced ebook format since its launch.

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<sup>56</sup> Alexandra Alter, “Blowing Up the Book.”

<sup>57</sup> Sovan Mandal, “Apple’s iPad Is Penguin’s Friend. Amazon Enemy?”

<sup>58</sup> Sovan Mandal, “Apple’s iPad Is Penguin’s Friend. Amazon Enemy?”

<sup>59</sup> Alexandra Alter, “Blowing Up the Book.”

<sup>60</sup> Alexandra Alter, “Blowing Up the Book.”

<sup>61</sup> Dave Cramer, “EPUB History 101: Evolution and Revolution.”; Bill McCoy, “9 Things You Need to Know About EPub3.”; SunTec Digital, “eBooks, Enhanced EBooks, and Apps – Understand Which Is Best for You.”

<sup>62</sup> Peter Costanzo, “The Real Reason Enhanced Ebooks Haven’t Taken Off (Or, Evan Schnittman Was Right... For the Most Part).”

<sup>63</sup> The Canada Guide, “Canadian Pop Culture.”

## Current Usage of the Enhanced eBook in the Marketplace

Between 2014 and 2017, BookNet Canada documented the progression of publishers interested in enhanced ebooks (see Figure 3). The number of Canadian publishers currently producing enhanced ebooks remained consistent (around 23%), though there was a downward trend in publishers who planned to produce enhanced ebooks, a spike in publishers interested in the possibility of producing an enhanced ebook, a steady number of publishers with no plans to produce enhanced ebooks (around 42%), and a small percentage of publishers who are unsure about the matter altogether (averaging at 4-5%).<sup>64</sup> The recent rise in publishers investigating the possibility of producing enhanced ebooks is encouraging. However, the decreasing percentage of publishers “planning to produce [enhanced ebooks] in the near future”<sup>65</sup> and the persistently high percentage of publishers with no future production plans displays an alarmingly low positive conversion rate after publishers investigate the format.

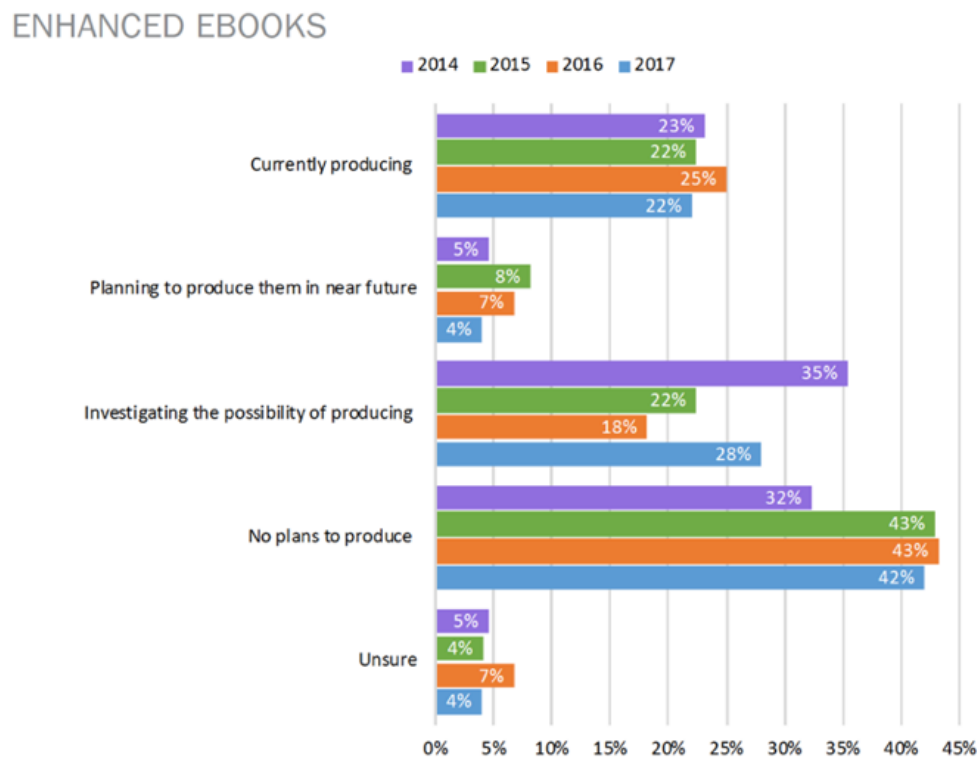


Figure 3: BookNet Canada’s results in response to the following question: “Are you producing, or do you plan to produce, enhanced ebooks (i.e., with extra content such as audio/video)?”<sup>66</sup> Graph is pulled from their 2018 study, “The State of Digital Publishing in Canada 2017.”

The “Audiobooks, Enhancements, and Accessibility: Digital Publishing in 2017” episode of BookNet Canada’s podcast added some insight into the 23% of publishers who are consistently producing enhanced ebooks: “Ebook enhancements are mostly popular with scholarly or educational publishers. When they are used by trade publishers, it’s mostly the big ones.”<sup>67</sup> BookNet Canada’s report broke these trends down further by separating the publishers by

<sup>64</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

<sup>65</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

<sup>66</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

<sup>67</sup> Zalina Alvi and Kira Harkonen, “Audiobooks, Enhancements, and Accessibility: Digital Publishing in 2017.”



size (see Figure 4) and production by market focus (see Figure 5).<sup>68</sup> In order of greatest to least, large publishers (publishers with revenue over \$10 M) produce 50% of the current enhanced ebooks on the market followed by mid-size publishers (\$1M to \$10M) at 33%, and small/self-publishers (less than \$1M) at 12%.<sup>69</sup> Of these publishers, the most popular markets producing enhanced ebooks are currently the educational/K to 12 (67%), scholarly/professional (40%), and then trade/consumer markets (16%).<sup>70</sup> Unfortunately, BookNet Canada’s data does not include the most successful publisher size nor marketplace in terms of units sold, which would be valuable figures to gather in future reports.

Breakdown by size of company	Currently producing enhanced ebooks	Planning to produce them in the near future	Investigating the possibility of producing them	No plans to produce enhanced ebooks	Unsure
Small / Self-Publisher (<\$1M)	12%	3%	33%	46%	6%
Mid-Size Publisher (\$1M-\$10M)	33%	11%	11%	44%	0%
Large Publisher (>\$10M)	50%	0%	25%	25%	0%

Figure 4: BookNet Canada’s correlation between publishers interested in the enhanced ebook format and the size of the publishing house.<sup>71</sup> Graph is pulled from their 2018 study, “The State of Digital Publishing in Canada 2017.”

Breakdown by market focus	Currently producing enhanced ebooks	Planning to produce them in the near future	Investigating the possibility of producing them	No plans to produce enhanced ebooks	Unsure
Trade / Consumer	16%	5%	30%	43%	5%
Scholarly / Professional	40%	0%	20%	40%	0%
Education / K-12	67%	0%	0%	33%	0%

Figure 5: BookNet Canada’s separation of current enhanced ebook publications based on their market.<sup>72</sup> Graph is pulled from their 2018 study, “The State of Digital Publishing in Canada 2017.”

After establishing the market focus, BookNet Canada determined the most popular enhancement: audio (see Figure 6).<sup>73</sup> Regrettably, BookNet Canada’s report does not break down how publishers are using audio or any other enhancement; however, common audio enhancement examples in the industry include sound effects, short sound clips, and narration.<sup>74</sup> Between 2016 and 2017, a consistent 100% of enhanced ebooks recorded in BookNet Canada’s report included audio of some kind, those including video spiked from 25% to 55%, the use of slideshows increased from 8% to 18%, and enhanced ebooks that included appearances of both interactive images and scripted animations remained steady at 18%.<sup>75</sup> In 2017, the study introduced “read-along” as a feature option, which revealed that 55% of enhanced ebooks—the same percentage that included video—incorporated a read-along capability.<sup>76</sup> It was therefore unsurprising when the report further revealed that audio, video, and read-along enhancements were the most used

<sup>68</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

<sup>69</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

<sup>70</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

<sup>71</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

<sup>72</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

<sup>73</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

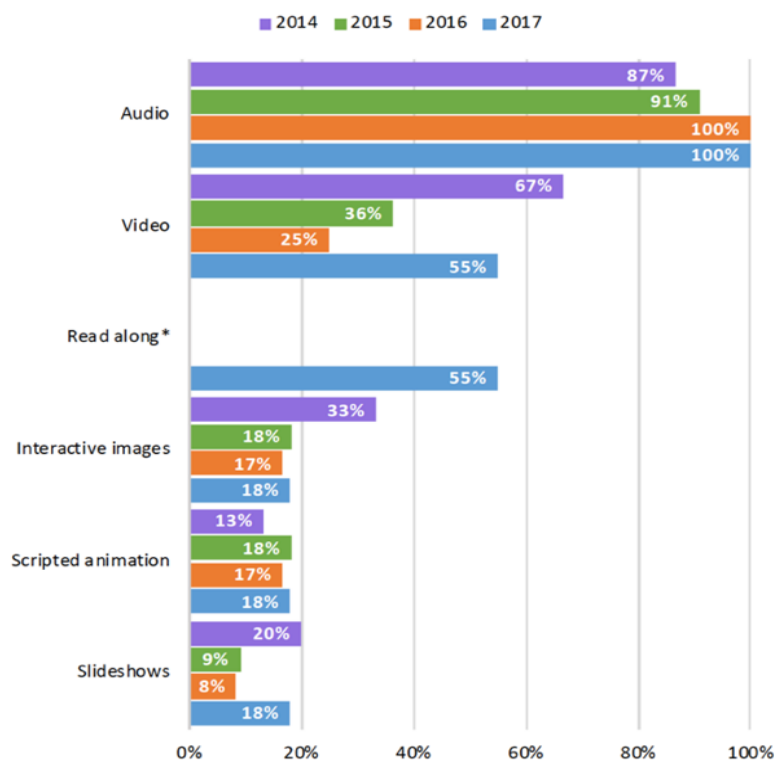
<sup>74</sup> Digital Publishing Hub, “Enhancing an EBook with Interactivity, Multimedia and Animation.”

<sup>75</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

<sup>76</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

features across all publisher sizes and marketplaces (see Figure 7).<sup>77</sup> Although audio and video were expected, the read-along enhancement's popularity is rather telling. This feature is predominantly used for children's publishing with a few trade applications;<sup>78</sup> these figures reinforce the fact that the K to 12 market is proving to be a popular marketplace for enhanced ebooks.

### EBOOK ENHANCEMENTS CURRENTLY EMPLOYED



\*Read-along was added as an option in 2017.

Figure 6: BookNet Canada's results in response to the following question: "What type of ebook enhancements do you currently employ? (Please select all that apply.)"<sup>79</sup> Graph is pulled from their 2018 study, "The State of Digital Publishing in Canada 2017."

<sup>77</sup> BookNet Canada, "The State of Digital Publishing in Canada 2017."

<sup>78</sup> Emese Felvégi and Kathryn I. Matthew, "EBooks and Literacy in K-12 Schools."

<sup>79</sup> BookNet Canada, "The State of Digital Publishing in Canada 2017."

Breakdown by size of company	Audio	Video	Interactive images	Read along	Scripted animation	Slideshows
Small / Self-Publisher (<\$1M)	100%	50%	0%	25%	0%	0%
Mid-Size Publisher (\$1M-\$10M)	100%	0%	0%	67%	33%	0%
Large Publisher (>\$10M)	100%	100%	50%	75%	25%	50%

Breakdown by market focus	Audio	Video	Interactive images	Read along	Scripted animation	Slideshows
Trade / Consumer	100%	50%	17%	50%	17%	17%
Scholarly / Professional	100%	100%	0%	0%	0%	0%
Education / K-12	100%	0%	0%	100%	0%	0%

Figure 7: BookNet Canada’s analysis of the types of enhancements used by small, mid-size, and large publishers in the three most popular enhanced ebook markets.<sup>80</sup> Graph is pulled from their 2018 study, “The State of Digital Publishing in Canada 2017.”

While enhanced ebooks are certainly costly to produce, BookNet Canada’s study showed a steadily increasing percentage of publishers reporting that offering the enhanced titles had a positive impact on their sales (see Figure 8).<sup>81</sup> Admittedly, it is unclear as to whether this positive impact helped publishers recover their initial investment from producing the enhanced titles. However, the decreasing trend of publishers who found no impact on sales, the 0% of publishers in 2016 and 2017 reporting a negative impact, as well as the steadily increasing trend of publishers reporting a positive impact on sales is very promising. These figures are especially important, because they help to address the caution previously displayed by publishers who were unsure about investing in the format.

### CORRELATION BETWEEN EBOOK ENHANCEMENTS AND SALES

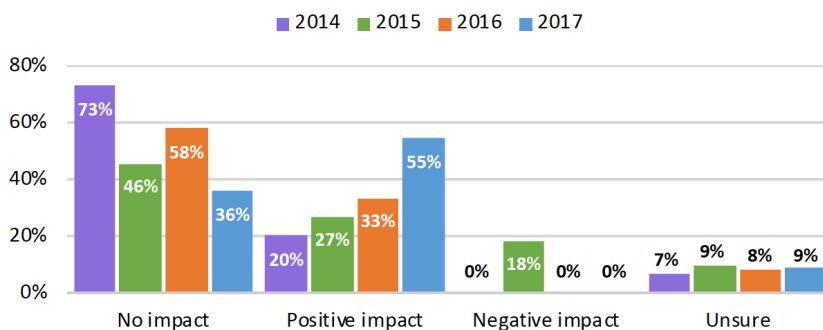


Figure 8: BookNet Canada’s results in response to the following question: “Have you seen any correlation between enhancements and an increase in ebook sales?”<sup>82</sup> Graph is pulled from their 2018 study, “The State of Digital Publishing in Canada 2017.”

### An Evaluation of the Enhanced eBook’s Success in the Marketplace

Publishers were cautious to adopt the format into their catalogues in part because of the format’s uncertain success rate. Players across the publishing industry experienced varying degrees of financial and cultural success from their enhanced titles. For instance, the 2017 children’s book *A Horse Named Steve*, written and illustrated by Kelly Collier

<sup>80</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

<sup>81</sup> Zalina Alvi and Kira Harkonen, “Audiobooks, Enhancements, and Accessibility: Digital Publishing in 2017.”

<sup>82</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

(see Figure 9), follows a narcissistic horse as he learns that being “exceptional” is more than just looking exceptional.<sup>83</sup> The title was simultaneously released in print and as a read-aloud ebook, and, though its sales figures are not evident, the comical children’s book could be termed as a successful enhanced ebook based on its impact in the market.<sup>84</sup> The picture book won three awards following its debut, including the 2017 award for Best Books for Kids & Teens from the Canadian Children’s Centre.<sup>85</sup> *The Globe and Mail*’s review of the title stated: “Kelly Collier has crafted a hilarious and interactive book with subtle gags and rollicking digressions that will lend itself well to classroom story times and repeat bedtime readings.”<sup>86</sup> The title also gained recognition from industry leaders such as *Quill & Quire*, *Booklist*, and *CM Magazine*.<sup>87</sup> As a result, *A Horse Named Steve* can be deemed a cultural success even if its financial success is unclear.

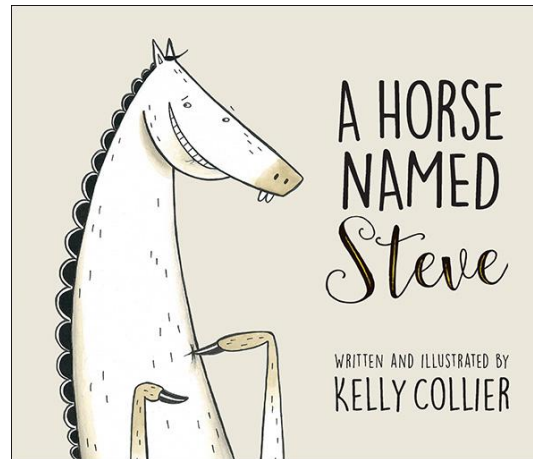


Figure 9: Front cover of *A Horse Named Steve* by Kelly Collier, produced by Kids Can Press in 2017.<sup>88</sup>

However, *A Horse Named Steve* could be considered a success story among countless failures.<sup>89</sup> Publisher and industry standards typically gauge the success of a title based on its sales record, and, according to an article in *The Wall Street Journal*, most publishers only sell approximately one thousand copies of their enhanced titles.<sup>90</sup> Since high sales records are one integral way that publishing companies stay afloat, the historically low sales track for enhanced titles frightens many publishers away from the format. However, it is important to note that sales records do not always reflect the quality of a title. For instance, an *NPR* article broke down the sales for titles shortlisted for the 2015 Man Booker Prize, and the figures were eye-opening: out of the six finalists, two had sold less than 4,000 copies of their hardcover editions.<sup>91</sup> Yet, titles short- or long-listed for prestigious awards like the Man Booker Prize are often recognized as great works of literature. As John B. Thompson aptly says, “...publishers are not just employers and financial risk-takers: they are also cultural mediators and arbitrators of quality and taste.”<sup>92</sup> Therefore, evaluating the success of the enhanced ebook format cannot rely solely on how many enhanced ebooks were sold for each title.

<sup>83</sup> Kids Can Press, “A Horse Named Steve.”

<sup>84</sup> Kelly Collier, *A Horse Named Steve*.

<sup>85</sup> Kids Can Press, “A Horse Named Steve.”

<sup>86</sup> Anna Fitzpatrick, “New Picture Books from JonArno Lawson and Natalie Nelson, Tyler Clark Burke, and Kelly Collier.”

<sup>87</sup> Kids Can Press, “A Horse Named Steve.”

<sup>88</sup> Kelly Collier, *A Horse Named Steve*.

<sup>89</sup> Alison Flood, “‘Ebooks Are Stupid’, Says Head of One of World’s Biggest Publishers.”

<sup>90</sup> Alexandra Alter, “Blowing Up the Book.”

<sup>91</sup> Lynn Neary, “When It Comes To Book Sales, What Counts As Success Might Surprise You.”

<sup>92</sup> John B. Thompson, *Merchants of Culture: The Publishing Business in the Twenty-First Century*.

## Using the Enhanced eBook to Revitalize Backlists

In addition to offering an engaging format for their frontlist titles, publishers are also venturing into the enhanced ebook format as a way to revitalize successful backlist titles. For example, Engage Books drew attention to their highly successful 2015 backlist title, *The Toddler's Handbook*, by creating a 2020 enhanced ebook edition with over 300 sound clips and numerous animations to provide learning and user engagement opportunities.<sup>93</sup> The publisher also introduced sound clips and animations to the title's activity pages to create a game-like scenario for children to test their knowledge (see Figure 10).<sup>94</sup> Publishers' backlists often generate a significant portion of their overall sales—for instance, in the first quarter of 2018, HarperCollins reported that 58% of their revenue was generated from their backlist titles.<sup>95</sup> As a result, if publishers can find new ways to draw attention to their backlist and reinvigorate sales, it is in their best interest.<sup>96</sup>



Figure 10: *The Toddler's Handbook* front cover (left). Pages 46 and 47 (right) show the level of interactivity Engage Books adds to their enhanced titles.

## Other Players Enter the Marketplace

Traditional trade publishers are also no longer the only players in the marketplace. Companies that specialize in multimedia production are also producing enhanced ebook titles. Tapocketa Studios' *Galdo's Gift: The Boovie* by Trevor Young and Eleanor Long (see Figure 11) is a prominent example, as seen by its four 2018 Digital Book World Awards, including Best Book Overall.<sup>97</sup> Produced in 2018, *Galdo's Gift* is an immersive storytelling experience filled with animations, read-aloud capabilities, sound effects, hidden clues, and a fun adventure.<sup>98</sup> Where traditional publishers

<sup>93</sup> Dayna Martin, *The Toddler's Handbook: Interactive (300 Sounds) Numbers, Colors, Shapes, Sizes, ABC Animals, Opposites, and Sounds, with over 100 Words That Every Kid Should Know*.

<sup>94</sup> Dayna Martin, *The Toddler's Handbook: Interactive (300 Sounds) Numbers, Colors, Shapes, Sizes, ABC Animals, Opposites, and Sounds, with over 100 Words That Every Kid Should Know*.

<sup>95</sup> Jim Milliot, "For Publishers, 2018 Is Off to a Decent Start."

<sup>96</sup> Mike Shatzkin, "Two Pretty Easy Ways to Add Revenue That Most Publishers Are Missing."

<sup>97</sup> Life + Style, "GALDO'S GIFT: AN INTERVIEW WITH CREATORS TAPOCKETA STUDIO.;" Apple iBooks Preview, "Galdo's Gift." A trailer of the enhanced ebook can be found on Tapocketa's website.

<sup>98</sup> Life + Style, "GALDO'S GIFT: AN INTERVIEW WITH CREATORS TAPOCKETA STUDIO."

have previously struggled to find qualified individuals to create their enhanced ebooks, multimedia production companies are more equipped to produce enhanced titles and are bringing attention to the format.

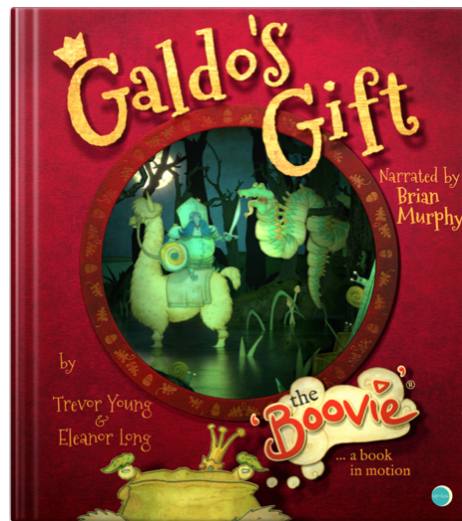


Figure 11: Front cover of *Galdo's Gift: The Boovie* by Trevor Young and Eleanor Long, produced by Tapocketa Studios.

### A New Medium for the Enhanced eBook

Publishers have also begun to create enhanced ebook apps. Similar to the enhanced ebook format, enhanced ebook apps have had financially and culturally successful and unsuccessful titles. For instance, Touch Press allocated \$120,000 to creating an app version of T.S. Elliot's *The Wasteland*; it hit the top of Apple's best-selling app books list and recovered the publisher's investment within four and a half weeks.<sup>99</sup> In contrast, Enhanced Editions, a United Kingdom ebook app developer founded in 2008, "released enhanced titles from big-name authors such as Stephen King [and] Barack Obama...[and] after failing to make a profit on most of its titles, some of which sold fewer than 100 copies, co-founder Peter Collingridge quit the app business."<sup>100</sup> Though enhanced ebook apps open the doors to creating virtual book worlds and enhancements that are not yet possible with the EPUB3 format (e.g., complex scripting<sup>101</sup>), creating individual apps for each title introduces an incredible workload and an even-more-precarious investment for publishers.<sup>102</sup> In addition, consumers would have to download a new app for every book they buy, and apps also lack the ability to be shelved in their digital library or even in a recognized retailer's digital bookstore. These limitations lower the title's discoverability and convenience, which is a risk that may deter some publishers.

### Reviewing the Format's Initial Obstacles to Success

As Arnaud Nourry, CEO of Hachette Livre, said in February 2018: "We've tried enhanced or enriched ebooks—didn't work. We've tried apps, websites with our content—we have one or two successes among a hundred failures."<sup>103</sup> Though Nourry is speaking in terms of financial failure due to low sales rather than a failure to publish culturally

<sup>99</sup> Alexandra Alter, "Blowing Up the Book."

<sup>100</sup> Alexandra Alter, "Blowing Up the Book."

<sup>101</sup> David Kudler, "The Problem with Enhanced Ebooks." David Kudler, "The Problem with Enhanced Ebooks."

<sup>102</sup> SunTec Digital, "EBooks, Enhanced EBooks, and Apps – Understand Which Is Best for You."

<sup>103</sup> Alison Flood, "'Ebooks Are Stupid', Says Head of One of World's Biggest Publishers."

impactful titles, the fact remains that the format has not been historically successful in penetrating the marketplace. Now a decade after the enhanced ebook format was launched, the original roadblocks to success need to be evaluated to determine if they have been addressed.

### Retailers & Devices Continue to Differ on Enhancement Support

By the mid-2010s, Overdrive (an ebook lending service that is paired with 50,000 libraries around the world<sup>104</sup>) joined Amazon, B&N, Kobo, Apple iBooks, and Google Play Books in the pool of leading ebook retailers and lenders in North America. At this point, Overdrive, Kobo, and Apple iBooks' online retail stores fully supported enhanced ebooks, while Amazon and Google Play Books continued to offer only partial retail support.<sup>105</sup> B&N, Kobo, and iBooks' combined 64.69 million ebook unit sales in the U.S. in 2017 shows large consumer awareness for the digital retailers (see Figure 12).<sup>106</sup> This awareness bodes well for potential discoverability of the enhanced ebooks in their online stores, yet the figure falls short compared to Amazon's 406 million units sold (see Figure 12).<sup>107</sup> Google Play Books is another player who has yet to fully accept enhanced ebooks, but their market share is smaller than their competitors; the American Association of Publishers reported that they held 1–2% market share in 2015 to Kobo's 3%, B&N Nook's 8%, and Apple's 11%.<sup>108</sup> Comparatively, the impact of Google Play Books not accepting all enhanced ebooks is small; however, it is another significant player in the field blocking the format's market penetration. Until Amazon (and its 89% of U.S. ebook sales<sup>109</sup>) and Google Play Books can fully support enhanced titles, publishers are still facing an uphill battle to get their enhanced ebooks into digital retailers' stores and then into consumers' digital libraries.

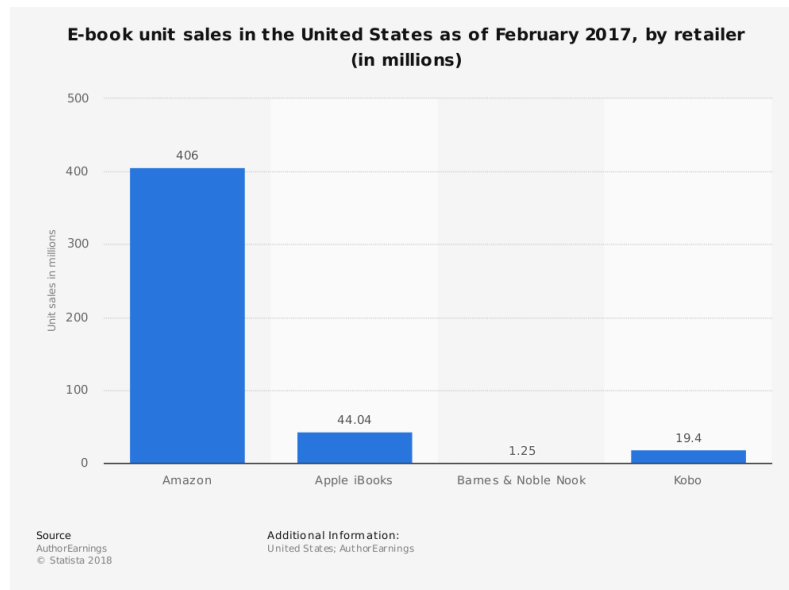


Figure 12: A graph representing the total ebook unit sales in the United States as of February 2017 by retailers who also sell e-reader devices (in millions).

<sup>104</sup> Aarian Marshall, "Publishers Worry as Ebooks Fly off Libraries' Virtual Shelves."

<sup>105</sup> Monica Dube, "Interactive Ebooks: What Are They and How to Make Them."

<sup>106</sup> Statista, "E-Book Unit Sales in the United States as of February 2017, by Retailer (in Millions)."

<sup>107</sup> Statista, "E-Book Unit Sales in the United States as of February 2017, by Retailer (in Millions)."

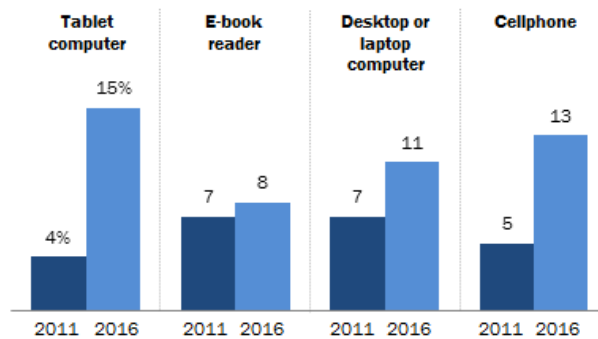
<sup>108</sup> Michael Kozlowski, "What Market Share Do Amazon, Apple, B&N Kobo and Google Have Selling EBooks?"

<sup>109</sup> Daniele Palumbo, "Amazon at 25: The Story of a Giant."

The trend of device support has also continued, with e-readers supporting few if any enhancements, while tablets and smartphones continue to support all enhanced features.<sup>110</sup> However, in 2019 the Pew Research Center released a Mobile Fact Sheet declaring that 81% of Americans own a smartphone, roughly half of adults in the U.S. own a tablet, and approximately half own an e-reader device.<sup>111</sup> Considering individuals can own more than one device, there appears to be significant overlap between readers who own a smartphone, an e-reader, and a tablet. Fortunately, the Pew Research Center’s 2016 study on book reading habits revealed that, of the three devices, e-reader ebook reading had remained relatively consistent (increasing slightly from 7% to 8% between 2011 and 2016) while smartphone and tablet ebook reading behaviour had more than doubled (5% to 13% for smartphones and 4% to 15% for tablets) (see Figure 13).<sup>112</sup> Moving forward, the trends display a small yet consistent market segment who are attached to their e-readers, but a growing consumer base who prefer to read on devices capable of supporting enhanced ebooks.

### More Americans are reading books on tablets and cellphones, even as dedicated e-reader use has remained stable

% of U.S. adults who have read an e-book in the last year using a/an ...



Source: Survey conducted March 7-April 4, 2016.  
"Book Reading 2016"

PEW RESEARCH CENTER

Figure 13: A graph from Pew Research Center’s 2016 study “Book Reading 2016” comparing which devices Americans are using to read their ebooks from 2011 to 2016.

### Classification and Discoverability: Better, But Not Quite

While industry professionals and interested parties may recognize the “enhanced ebook” label, it is still an uncommon term in the marketplace. Admittedly, the classification and discoverability of enhanced ebooks has marginally improved with titles, subtitles, and front-cover callouts featuring terms such as “interactive” and “read-along,” but the lack of consistency largely derails this progress. For instance, Engage Books’ *The Toddler’s Handbook* uses “interactive” in its subtitle and a front-cover callout with a hand reaching out to a “Touch” button with a volume symbol (see Figure 14). In comparison, Tapocketa Studios’ *Galdo’s Gift* includes “a book in motion” and “the Boovie” alongside “Narrated by Brian Murphy” (see Figure 14). Tapocketa Studios also attempted to create their own format

<sup>110</sup> Markus Reily, “Tablets vs. E-Readers: The 2019 Debate.”

<sup>111</sup> Pew Research Center, “Mobile Fact Sheet.”

<sup>112</sup> Andrew Perrin, “Book Reading 2016.”



classification by calling *Galdo's Gift* a “Boovie,” a mash-up of “book” and “movie.”<sup>113</sup> Both book descriptions also mention the title’s enhanced features, however, the lack of consistency in title keywords and front-cover visual labelling for enhanced ebooks translates to poor searchability (and therefore discoverability) in digital retailers’ stores.

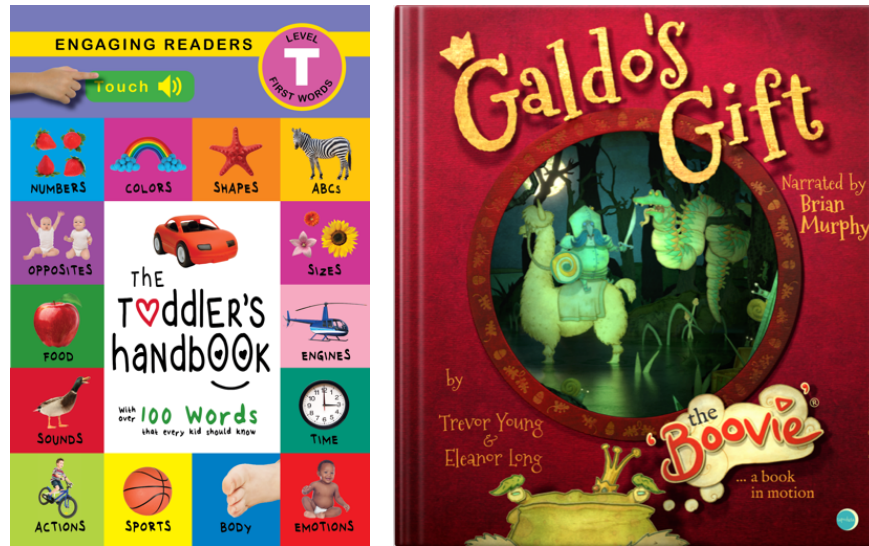


Figure 14: Front covers of *The Toddler's Handbook: Interactive (300 Sounds) Numbers, Colors, Shapes, Sizes, ABC Animals, Opposites, and Sounds, with over 100 Words that every Kid should Know* (left) and *Galdo's Gift: The Boovie* (right).

It is unclear as to whether these keywords are included in the title metadata; however, the option is available. According to Editeur’s “ONIX for Books: Product Information Message” document tailored for “describing e-books and digital content in ONIX 3.0,” there are two important steps that publishers can take to identify their enhanced ebook titles to their supply chain. First, publishers could label the edition with “the code ‘ENH’ from List 21” under the <EditionType> data element, though this implies that the publisher has also created a basic ebook edition.<sup>114</sup> Second, publishers can also outline which enhanced features their title contains through the “<PrimaryContentType> [field] (ONIX 3.0 only) and repeats of [the] <ProductContentType> [field] (ONIX 2.1 and 3.0) to list the various types of content in the product—text, video, audio and so on.”<sup>115</sup> Providing this level of detailed classification can help retailers group titles together into categories, as well as allow consumers to easily identify the title’s features. For example, the Apple iBooks app features an “Enhanced” header in the left sidebar of the title listing where consumers can see that *A Horse Named Steve* includes audio enhancements (see Figure 15).

<sup>113</sup> Trevor Young and Eleanor Long, *Galdo's Gift: The Boovie*.; Nicholas C. Rossis, “Galdo's Gift: A Groundbreaking Children's Storybook.”

<sup>114</sup> Editeur, “ONIX for Books, Product Information Message.”

<sup>115</sup> Editeur, “ONIX for Books, Product Information Message.”

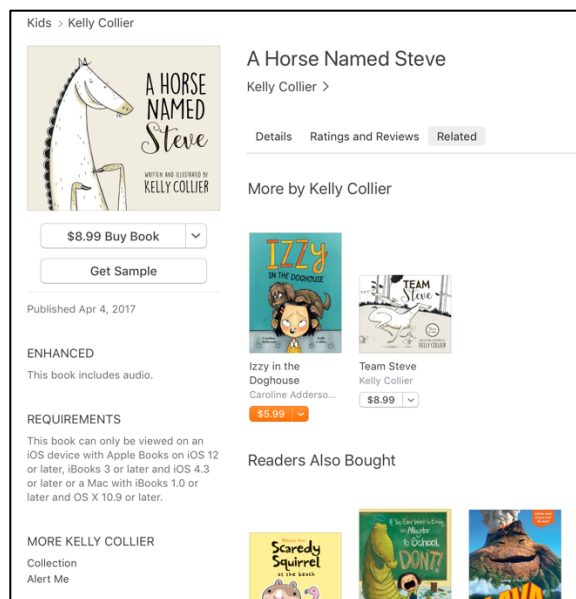


Figure 15: The Apple iBooks app listing (left) for *A Horse Named Steve* by Kelly Collier, published by Kids Can Press in 2017. This listing shows a header titled “Enhanced” located in the sidebar that includes the sentence: “This book includes audio.”

### Slow Progress with Consumer Adoption

While most book purchasers recognize the ebook format, this awareness does not always apply to the enhanced ebook format. However, consumers are now comfortable with the overall ebook concept and will likely be more willing to try this “new” take on a now-familiar and widely accepted format. Furthermore, the increasing number of successful enhanced ebooks have gained consumer attention. Award-winning enhanced ebooks like *A Horse Named Steve* and *Galdo’s Gift* are raising awareness of the format, and runaway successes, such as the enhanced ebook app of T.S. Elliot’s *The Wasteland*, demonstrate a strong potential consumer demand for this format.

Despite this forward progression, there have been significant set-backs. The children’s K to 12 and educational publishing marketplaces have historically been the most saturated market for enhanced ebooks,<sup>116</sup> yet there is a fundamental roadblock that has hindered consumer adoption in this marketplace: parental concerns over screen time.<sup>117</sup> A 2020 Pew Research Center study focused on parents with children aged 5 to 11 revealed that 71% of parents are at least somewhat concerned about how much time their children spend in front of screens.<sup>118</sup> Considering enhanced ebooks can only be read via a screen, publishers must overcome the caution displayed by parents in order to continue growing their consumer base in this marketplace.

### Caution Prevails in the Publishing Industry

Ooligan Press’ Kaitlin Barnes remarks on the growing consumer awareness and demand trend in her 2018 article, “Don’t Give Up on Enhanced Ebooks Yet.”<sup>119</sup> She admits that enhanced ebooks were not an overnight success, but they are gaining consumer attention.<sup>120</sup> She declares that the trend will continue “if only publishers are willing to keep

<sup>116</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”; David Kudler, “The Problem with Enhanced Ebooks.”

<sup>117</sup> Brooke Auxier et al., “Parenting Children in the Age of Screens.”

<sup>118</sup> Brooke Auxier et al., “Parenting Children in the Age of Screens.”

<sup>119</sup> Kaitlin Barnes, “Don’t Give Up on Enhanced Ebooks Yet.”

<sup>120</sup> Kaitlin Barnes, “Don’t Give Up on Enhanced Ebooks Yet.”

demonstrating the possibilities of enhanced ebooks.”<sup>121</sup> Barnes’ message to publishers comes at a critical time to encourage them to move past their previous caution and begin making the investment. However, the caution is perhaps understandable since the enhanced ebook format has had difficulty finding a consistently viable market in the decade since its debut. The format’s less-than-stellar sales track—the standard indicator for success by most players in the industry—is also not exactly inviting. Combined with the surging popularity of audiobooks and the financial investment required to participate in the audio format, many publishers are likely unable to accommodate investments into two costly formats within such a short period of time. Unless there is a distinct shift in consumer purchasing behaviour, most publishers will likely continue to focus their attention on high-performing formats.

## THE ENHANCED EBOOK’S PLACE IN TOMORROW’S PUBLISHING MARKET

Today’s publishing market may already hold more promise for enhanced ebooks than it has in the past, but persistent obstacles and new potential hurdles will need to be overcome and monitored to help enhanced ebooks secure a better position in tomorrow’s publishing industry. After addressing these recurrent and burgeoning roadblocks, an evaluation of the current marketplace can help determine where the enhanced ebook format can thrive in the future.

### Overcoming Drawbacks and Past Obstacles

Unfortunately, the original drawbacks and hurdles that stunted the growth of the enhanced ebook format still exist in large part. For the publishing industry to fully embrace the enhanced format, these obstacles need to be removed so as not to impede publishers and their future projects.

#### Diminishing Drawbacks

In the past, the enhanced format was cost-prohibitive to produce, because each enhanced ebook was manually crafted by an individual knowledgeable about coding, book design, and the publishing industry. According to BookNet Canada’s “The State of Publishing in Canada 2019” report, publishers have continued to express concerns about high production costs with formats such as audiobooks, enhanced ebooks, and accessible ebooks.<sup>122</sup> However, new software has helped reduce the financial investment required to produce enhanced ebooks. Software programs such as Kotobee, CircularFLO, Aquafadas, and TigerCreate are available to support enhanced ebook and enhanced ebook app creation to help reduce overall production costs as well as drastically decrease the level of technical experience required:

- **Kotobee** is a well-established tool for publishers to create enhanced ebooks, as well as the recipient of the Academics’ Choice 2016 Smart Media Award. Publishers can use the app to create tailored ebooks with features ideal for corporate training and the K to 12, higher education, and trade publishing markets. For instance, organizations can stylize their enhanced apps or ebooks with their branding, educators can integrate their learning management software to add quizzes with real-time reporting, and book publishers can add audio, video, animations, and read-aloud functionality with the ability to export the title into multiple industry-standard formats.<sup>123</sup>

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<sup>121</sup> Kaitlin Barnes, “Don’t Give Up on Enhanced Ebooks Yet.”

<sup>122</sup> BookNet Canada, “The State of Publishing in Canada 2019.”

<sup>123</sup> Kotobee, “Kotobee Author.”

- **CircularFLO** is a software rising in popularity that pairs with InDesign to help create enhanced ebooks from start to finish. Publishers around the world, from Penguin Random House UK, Nosy Crow, Kids Can Press, Pan MacMillan, and Hachette Children’s Books, use the software to add audio, video, animations, read-aloud functionality, and place web code with little to no coding required on the publishers’ part.<sup>124</sup>
- **Aquafadas** is another recognized option for publishers who are interested in producing enhanced ebook apps.<sup>125</sup> Part of the Rakuten family, Aquafadas offers end-to-end mobile app solutions through an InDesign plugin. Established publishers such as National Geographic have used Aquafadas to create a rich, interactive version of their print material to increase their content value, meet consumer demands, and generate new revenue streams.<sup>126</sup>
- **TigerCreate** offers a mixture of the previous three software programs. As an independent software available for publishers to download, TigerCreate can transform any content project into interactive titles for web browsers (HTML), stand-alone apps, and iBooks, Tigerbooks, or KF8 editions.<sup>127</sup> The TigerCreate software uses intuitive controls and tools to help publishers transform their print material into 2D or 3D interactive spaces with audio, video, and games in multiple languages.<sup>128</sup>

The introduction of software that expedites and simplifies the process makes the format more practical to produce—much like how website builder WordPress made website production more accessible.<sup>129</sup> Considering 50% of enhanced ebooks were produced by large publishers in 2017,<sup>130</sup> these software programs can help level the playing field for small and medium publishers.

Overall, the EPUB3 format is still the ideal format for enhanced ebooks, as the KF8 format has not evolved since its introduction to include any enhancements beyond embedded audio and video. However, change is coming: as of October 27, 2020, Amazon no longer accepts the MOBI format.<sup>131</sup> Though they will still support all MOBI titles currently in their retail store, Amazon requests that publishers begin to use the EPUB3 format for their reflowable titles.<sup>132</sup> This startling announcement shows a promising shift to embracing the EPUB3 format in Amazon’s vast online ebook retail store. Yet despite this promising future, Amazon still does not accept fixed-layout EPUB3 files, and it is currently unclear if Amazon will accept reflowable EPUB3 files that include enhancements. Therefore, most enhanced ebooks continue to be locked out of the biggest U.S. ebook retailer’s online store.

Regrettably, the restriction to the fixed-layout format also continues to hamper accessibility in enhanced ebooks. Thankfully, publishers can keep this drawback in mind when drafting their design. Book designers have the

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<sup>124</sup> CircularFLO, “CircularFLO.”

<sup>125</sup> Kotobee, “How to Create an Interactive Enhanced Ebook: A Step-by-Step Guide.”

<sup>126</sup> Aquafadas, “Our Case Study: National Geographic España.”

<sup>127</sup> Kotobee, “How to Create an Interactive Enhanced Ebook: A Step-by-Step Guide.”; TigerCreate, “Features.”

<sup>128</sup> TigerCreate, “FAQ.”

<sup>129</sup> Jordan Forbes, “Web Builders and the Future of the Web Development Industry.”

<sup>130</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

<sup>131</sup> CoreSource, Ingram, “Upcoming Change to Amazon File Formats Accepted,” October 7, 2020.

<sup>132</sup> CoreSource, Ingram, “Upcoming Change to Amazon File Formats Accepted,” October 7, 2020.

opportunity to use the title’s enhancements to counteract a few of the fixed-layout limitations and integrate support for accessible reading. For example, publishers can add preset font-size variations that could be activated on a page-by-page basis, and they could equip the enhanced ebooks with a text-to-speech functionality to offer another content delivery option.<sup>133</sup>

### Encouraging Retailer & Device Adoption

Barnes & Noble, Kobo, Apple iBooks, and OverDrive are currently three large ebook retailers and one significant ebook lending service that welcome all enhancements,<sup>134</sup> yet Amazon and Google Play Books continue to support only partial enhancements. Amazon admittedly holds a large stick in the publishing marketplace; however, if publishers and consumers prove that enhanced ebooks are profitable, dangling the carrot of potential profit may encourage them to update their KF8 format to accept all enhancements or accept fixed-layout EPUB3 files in addition to the reflowable EPUB3 file format.

While e-reader enhanced ebook support is unlikely to rise, the 2016 Pew Research Center report on book reading habits for adults in the U.S. between 2011 and 2016 showed that readers prefer reading on their tablets and smartphones over e-readers.<sup>135</sup> Considering enhanced ebooks are fully supported on tablets and smartphones, this trend will not impede enhanced ebooks’ growth in the industry.

### Establishing an Industry-Wide Classification to Increase Discoverability

In an effort to establish a common label to identify the enhanced ebook format and increase discoverability, key players in the publishing industry should create best-practice guidelines for “enhanced ebook” metadata, descriptions, and back-cover annotations. The World Wide Web Consortium (W3C), known for their accessibility standards, and the International Digital Publishing Forum (IDPF), creator of the EPUB3 format, finished merging in 2017, and a partnership between these digital giants is the perfect opportunity to form best-practice guidelines for the enhanced ebook format.<sup>136</sup> IDPF board member and VP of Production and Content Architecture at Ascend Learning, Paul Belfanti, was hopeful when W3C and IDPF completed their merger, stating “the prospect of rich, interactive, personalized learning experiences that produce better, measurable outcomes is bright indeed.”<sup>137</sup>

Similar to the efforts shown by *Resonate* and *The Toddler’s Handbook*, publishers could include a distinctive mark on their front covers to effectively distinguish the format from its basic ebook counterpart and other basic ebooks in digital retail stores. An effective option would be for the publishing industry to develop a crest to be placed on the front cover of enhanced ebooks that includes iconographic symbols alluding to the enhancements contained within the title. Publishers would then add the crest (with the necessary symbols) on their enhanced ebooks’ front covers to clearly classify their enhanced titles for consumers.

Retailers also have the opportunity to help increase classification and discoverability with the structure of their online stores. In line with how online retailers have created filters for “ebooks” and “audiobooks,” such as the Kobo “Media

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<sup>133</sup> Jesse Savage, “Enhanced E-Cookbooks: A Recipe for Accessibility.”

<sup>134</sup> Statista, “E-Book Unit Sales in the United States as of February 2017, by Retailer (in Millions).”

<sup>135</sup> Andrew Perrin, “Book Reading 2016.”

<sup>136</sup> Stephen Shankland, “Your E-Books Are about to Get a Big IQ Boost.”

<sup>137</sup> W3C, “New Roadmap for Future of Publishing Is Underway as W3C and IDPF Officially Combine.”

Type” filter displayed in Figure 16,<sup>138</sup> retailers could implement an “enhanced ebook” filter in their digital stores. Other retailers could mirror B&N Nook’s approach by creating a separate section of their online store dedicated to the format (see Figure 17), though even B&N Nook’s approach has room for improvement as the “Enhanced Nook Books” section is not currently listed in their main navigation bar.<sup>139</sup>

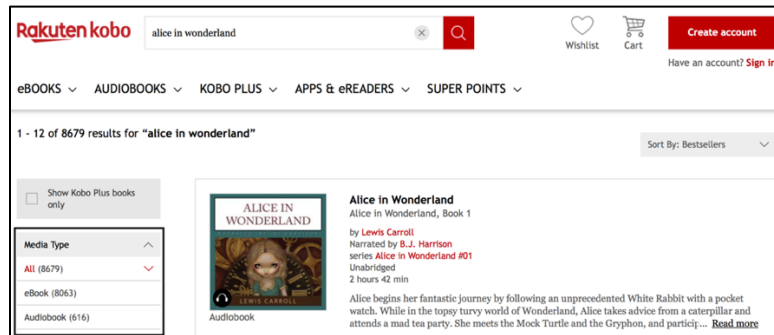


Figure 16: Search engine results on Kobo for “Alice in Wonderland” reveals a “Media Type” filter option in a black box on the left.

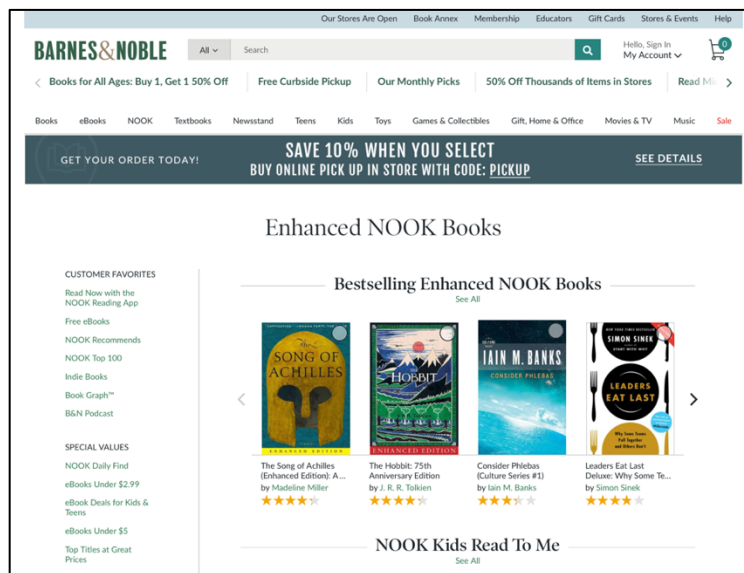


Figure 17: The B&N Nook’s “Enhanced NOOK Books” section of their website.<sup>140</sup>

## Raising Consumer Awareness & Securing Consumer Interest

Using the same marketing strategies as the promotional practices implemented with the initial launch of the general ebook format, publishers and retailers can raise consumer awareness about the enhanced ebook format. Not only will this help promote specific titles, it will in turn establish the format’s official label in consumers’ minds and ideally optimize their search engine results.

<sup>138</sup> Kobo, “Alice in Wonderland.”

<sup>139</sup> Barnes & Noble, “Home.”

<sup>140</sup> Barnes & Noble, “Enhanced NOOK Books.”

Publishers can also combat any parental misgivings over screen time by highlighting the benefits of enhanced ebooks, particularly for educational purposes. For instance, HarperCollins has released read-aloud editions of their beloved *I Can Read!* leveled reader series.<sup>141</sup> Their titles are also available in print, but the enhanced editions are ideal to help guide readers through the books and follow along with the highlighted words. Nelson has likewise made significant inroads into creating enhanced ebooks for their higher education titles.<sup>142</sup> In June 2020, Nelson partnered with Top Hat, a Toronto-based digital learning platform used in 750 of the top 1,000 post-secondary schools in North America, to “adapt 400 print titles from Nelson for its online platform.”<sup>143</sup> The digital textbooks will include “multimedia modifications such as rollover definitions, interactive 3D models, comprehensive chapter summaries, study guides, and quizzes.”<sup>144</sup> Publishers should capitalize on opportunities such as these to secure consumer interest in enhanced ebooks and demonstrate how they can benefit schools, universities, libraries, students, teachers, and parents alike. Once the format has gained sufficient consumer attention and demand, publishers can begin to branch out into other marketplaces to capitalize on the enhanced ebook format.

### Confirming Consumer Demand for Publishers

As David Kutler states in his piece, “The Problem with Enhanced Ebooks,” the format has proven to be successful in the textbook and children’s picture book markets.<sup>145</sup> The BookNet Canada 2018 report supports this claim, yet the percentage of publishers who produce enhanced ebooks has remained consistent (about 23%) between 2014 and 2017.<sup>146</sup> Despite the lack of growth in this area, the percentage of publishers who noted a positive impact on their sales more than doubled (20% to 55%) between 2014 and 2017.<sup>147</sup> Unfortunately, BookNet Canada’s “The State of Digital Publishing in Canada” report series has evolved into a yearly “The State of Publishing in Canada” report and now includes only brief mentions of the enhanced ebook format. As a result, the level of analysis shown in “The State of Digital Publishing in Canada 2017” report has not been repeated, and it is unclear as to whether the surge in positive sales impact has dropped, stayed consistent, or risen. To gain more insight into how the format has performed for publishers in the North American publishing industry since 2017, an updated survey from BookNet Canada is required. Ideally, BookNet Canada’s report would be corroborated by American organizations such as NPD BookScan to confirm return on investment opportunities and consumer demand specific to the U.S. publishing industry. The reports would also preferably feature information missing from the previous BookNet Canada report, such as the size and market focus of publishers who have produced enhanced ebooks with high sales records and the intent and purpose for the enhancements in their titles.

### Encouraging Investment from North American Publishers

As stated previously, the enhanced ebook can be considered a multimedia version of the basic ebook. As Nourry explained, the expertise and software required to prepare and produce multimedia products are often not found in traditional publishing houses.<sup>148</sup> A 2018 article in *The Guardian* revealed that Hachette, the fourth-largest publisher in The Big Five according to a 2017 *Publishers Weekly* article,<sup>149</sup> “has tried to tackle this by acquiring three video-game

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<sup>141</sup> HarperCollins Children’s Books, “I Can Read! Books.”

<sup>142</sup> Ryan Porter, “Digital Learning Platform Top Hat to Acquire Nelson’s Higher-Ed Textbook Business.”

<sup>143</sup> Ryan Porter, “Digital Learning Platform Top Hat to Acquire Nelson’s Higher-Ed Textbook Business.”

<sup>144</sup> Ryan Porter, “Digital Learning Platform Top Hat to Acquire Nelson’s Higher-Ed Textbook Business.”

<sup>145</sup> David Kudler, “The Problem with Enhanced Ebooks.”

<sup>146</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

<sup>147</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

<sup>148</sup> Alison Flood, “‘Ebooks Are Stupid’, Says Head of One of World’s Biggest Publishers.”

<sup>149</sup> Jim Milliot, “Ranking America’s Largest Publishers.”

companies over the last two years...in order to tap talent from different industries.”<sup>150</sup> Investments of this kind can be quite costly, and they may be out of the reach of small and medium publishers. However, Michael Cairns from the Book Industry Study Group (BISG) published a 2018 report titled “The Publishing Industry’s Blindspot: Technology Spending” that warned publishers about missed business opportunities due to a lack of technological investment.<sup>151</sup> Cairns states: “The transformative effect of digitization is only just beginning to be felt and will continue to create either opportunities or catastrophes for all businesses for the next decade. The publishing and media business is not immune to these forces and must make investments in new technology solutions to remain competitive.”<sup>152</sup> Though Hachette approached this investment through acquisition, smaller publishers can invest by collaborating with outside companies (e.g., multimedia production companies) or building an in-house team that can specialize in these multimedia projects. Admittedly, hiring personnel who are experienced in this area may be difficult and costly, especially if publishers hire from outside of the publishing industry; however, with more than half of publishers reporting increased sales due to their enhanced titles,<sup>153</sup> it may be worth it. If publishers are not quite ready to make a full investment, they also have the option to dip their toes into the water by testing out the new enhanced ebook software programs available in the market. If they are unsure about acquiring a new software, InDesign has been capable of creating enhanced ebooks since the CS5 update, though its tools are not as intuitive or as diverse as those on offer from Kotobee and CircularFLO and are restricted to ebooks rather than apps unlike Aquafadas and TigerCreate.

## Monitoring Potential New Hurdles

While the North American publishing industry has to contend with existing obstacles, they also need to keep a close eye on potential new hurdles on the horizon. As part of the greater “ebook” family, the enhanced ebook format is not immune to recent policy changes and the industry debates and trends that originally surfaced when the basic ebook rose in popularity. For instance, the price-fixing snafu that occurred between five of the Big Six publishers and Apple in the early 2010s indicates that pricing models could be a bone of contention as the enhanced ebook format becomes more commonplace. eBook subscription services are also expected to rise in popularity in the coming years, and this shift could cause wide-sweeping changes to author contracts and industry distribution and revenue streams. The fluctuating consumer purchasing behaviour is also a rising concern as the industry watches consumer print sales and digital library orders increase during the 2020 coronavirus pandemic. All in all, there are significant barriers-to-success that need to be monitored if the enhanced ebook format will effectively penetrate the North American publishing industry.

## Establishing an Enhanced eBook Pricing Model

Similar to the pricing struggle that the North American publishing industry experienced after basic ebooks rose in popularity, the pricing model for enhanced ebooks may become a concern. Though new software can reduce the overall cost of labour to produce the format, it is still inherently more expensive to produce than the basic ebook. BookNet Canada showed that 100% of enhanced ebooks produced between 2014 and 2017 included audio, with 55% including video and read-along functionalities.<sup>154</sup> The production of the audio and video recordings required for all three enhancements are expensive, and publishers will likely need to increase retail prices to offset the costs. Sadly,

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<sup>150</sup> Alison Flood, “‘Ebooks Are Stupid’, Says Head of One of World’s Biggest Publishers.”

<sup>151</sup> Michael Cairns, “The Publishing Industry’s Blindspot: Technology Spending.”

<sup>152</sup> Michael Cairns, “The Publishing Industry’s Blindspot: Technology Spending.”

<sup>153</sup> Zalina Alvi and Kira Harkonen, “Audiobooks, Enhancements, and Accessibility: Digital Publishing in 2017.”

<sup>154</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”



consumers have not reacted well to higher ebook prices in the past, as seen in *Publisher's Weekly's* original *The Battle of \$9.99* ebook<sup>155</sup> and the conspiracy in place by Apple and five of the Big Six publishers (Simon & Schuster, Penguin, HarperCollins, Hachette, and Macmillan) to fix ebook pricing.<sup>156</sup> Most traditionally published trade ebooks are now priced between \$2.99 and \$4.99 in North America,<sup>157</sup> and publishers straying too far from this price range can directly affect their sales. However, the price point will likely be helped by strategic marketing practices. Most consumers will pay more for a product that has a higher perceived value;<sup>158</sup> in fact, this point of view was shown in a *PCMag* article shortly following the enhanced ebooks' debut.<sup>159</sup> If publishers can establish a high value association with enhanced ebooks, consumers will accept enhanced titles at an increased price range.

### The Rise of eBook Subscription Services

In addition to pricing models, publishers may want to keep abreast of any upcoming ebook subscription services. *Forbes* contributor and president of GiantSteps Media Technology Strategies, Bill Rosenblatt, predicts "by the end of the 2020s, we'll see subscription ebook [services] become as ubiquitous as Spotify and Netflix."<sup>160</sup> Though Kindle Unlimited is performing quite well so far with a rumoured 3 million subscribers<sup>161</sup> and Kobo Plus was successful enough in the Netherlands for the company to launch it in Canada in July 2020,<sup>162</sup> ebook subscription services have not had the best track record. In 2015, Peter Hudson, co-founder of ebook subscription service Shelfie, declared that "mainstream ebook subscription services will not succeed until...all trade publishers are on board."<sup>163</sup> That said, ebook subscription services' less-than-successful history is not entirely the fault of publishers.<sup>164</sup> While record labels and other media services own the sound recordings and can license them to companies like Spotify and Netflix, Rosenblatt states, "[p]ublishers typically don't own copyrights on trade books, authors do."<sup>165</sup> Publishers do have the power to negotiate these digital rights in their publisher-author contracts; however, it is up to the authors to agree. Rosenblatt was firm in his belief that these "logjams," as he calls them, will be resolved in the coming decade; and he suggests that publishers be prepared.<sup>166</sup>

Admittedly, the publishing industry has historically been slow to adopt change, especially technological change.<sup>167</sup> As a result, Rosenblatt's prediction of ebook services becoming as successful as Spotify and Netflix by the end of the 2020s may be optimistic. A more apt comparison for publishers could be Amazon's Audible. The audiobook subscription model has a variety of subscription plans with a pre-determined number of audiobook downloads every month rather than unlimited access.<sup>168</sup> Among other benefits, Audible also allows for a discount on additional purchases beyond the amount allotted in each plan for its subscribers.<sup>169</sup> Though Amazon is notoriously private about their subscription count

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<sup>155</sup> Publishers Weekly, "'The Battle of \$9.99,' a PW Original E-Book."

<sup>156</sup> Constance Grady, "The 2010s Were Supposed to Bring the Ebook Revolution. It Never Quite Came."

<sup>157</sup> David Kudler, "The Price Is Right: 6 Secrets to Pricing Your Ebook."

<sup>158</sup> Sandeep Heda, Stephen Mewborn, and Stephen Caine, "How Customers Perceive a Price Is as Important as the Price Itself."

<sup>159</sup> Jennifer Bergen, "E Is for Enhanced: 8 Enhanced Ebooks Worth Checking Out."

<sup>160</sup> Bill Rosenblatt, "Why Ebook Subscription Services Will Finally Succeed In The Coming Decade."

<sup>161</sup> Bill Rosenblatt, "Why Ebook Subscription Services Will Finally Succeed In The Coming Decade."

<sup>162</sup> Erin Ierullo, "Rakuten Kobo Launches All-You-Can-Read Ebook Subscription Service in Canada."

<sup>163</sup> Porter Anderson, "What Canada's Shelfie Data Suggests About Ebook Subscriptions."

<sup>164</sup> Bill Rosenblatt, "Why Ebook Subscription Services Will Finally Succeed In The Coming Decade."

<sup>165</sup> Bill Rosenblatt, "Why Ebook Subscription Services Will Finally Succeed In The Coming Decade."

<sup>166</sup> Bill Rosenblatt, "Why Ebook Subscription Services Will Finally Succeed In The Coming Decade."

<sup>167</sup> Michael Cairns, "The Publishing Industry's Blindspot: Technology Spending."

<sup>168</sup> Audible, "What Is Included in Audible Membership Plans?"

<sup>169</sup> Audible, "What Is Included in Audible Membership Plans?"

and overall sales figures, Audible publisher Beth Anderson was quoted in a 2018 *Vulture* article stating that “Audible has had double-digit year-on-year subscriber growth, keeping pace with the market.”<sup>170</sup> Considering the comparable production costs for an audiobook and an enhanced ebook, Audible’s subscription model can be taken as confirmation that high-production cost ebook formats can be viable in a subscription service. When taken into consideration with Rosenblatt’s prediction, publishers need to begin planning if and how they will accommodate ebook subscription services in the future.

### Shifting Purchasing Behaviour

Finally, there has been a distinct shift in consumer purchasing behavior toward print titles during the 2020 COVID-19 pandemic. According to NPD BookScan, early June 2020 to mid-August 2020 saw print sales increase more than 12% over the previous 10 weeks.<sup>171</sup> The preference for print may be attributed to screen fatigue during the weeks of isolation, but it is unclear whether or not it will continue once social distancing measures conclude. If the trend continues, the increased consumer demand for print titles may lead to fewer consumer ebook sales overall.

At the same time, libraries have begun to increase their digital book orders to accommodate their reduced budgets and the consumer shift toward book lending during the COVID-19 pandemic.<sup>172</sup> According to OverDrive, “checkouts of ebooks are up 52 percent from the same period [in 2019].”<sup>173</sup> Unfortunately, this increase in ebook purchasing and lending is not without its struggles. Long-standing tensions between libraries and publishers about digital lending and ebook sales have been heating up in recent years with policy and price changes, and the surge in ebook lending from libraries is adding fuel to the fire.<sup>174</sup> As part of the larger ebook family, enhanced ebooks—and their almost-unavoidable increased price point—may cause additional strain on the relationship. Both behaviours—the consumer shift toward purchasing print books and lending ebooks and the libraries’ increased digital purchasing behaviour—will require monitoring to help inform publishers decisions about the enhanced ebook format moving forward. If consumers would rather purchase print titles and lend ebooks while libraries’ strained budgets cannot accommodate the costly enhanced ebook format, it may be another strike against publishers investing into enhanced ebooks.

## Finding Its Place

Similar to how genre romance, crime, and thrillers have dominated the basic ebook format in the past few years,<sup>175</sup> the enhanced ebook has the potential to excel in specific markets. The BookNet Canada report shows that the scholarly/professional, trade/consumer, and educational/K to 12 markets have all been using enhanced ebooks to varying degrees of success. Therefore, an analysis is required of each market to determine the most viable market segments where the enhanced format can set down roots in tomorrow’s North American publishing industry.

### Scholarly/Professional Markets

Compared to the other markets, the scholarly/professional market shows some potential with 20% of publishers investigating the possibility of creating enhanced ebooks.<sup>176</sup> These markets currently produce the second-most

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<sup>170</sup> Boris Kachka, “Audiobooks Are the New Ebooks, Except They Might Keep Growing.”

<sup>171</sup> Alexandra Alter, “Printer Jam: Serious Supply Issues Disrupt the Book Industry’s Fall Season.”

<sup>172</sup> Aarian Marshall, “Publishers Worry as Ebooks Fly off Libraries’ Virtual Shelves.”

<sup>173</sup> Aarian Marshall, “Publishers Worry as Ebooks Fly off Libraries’ Virtual Shelves.”

<sup>174</sup> Aarian Marshall, “Publishers Worry as Ebooks Fly off Libraries’ Virtual Shelves.”

<sup>175</sup> Lucy Handley, “Physical Books Still Outsell E-Books — and Here’s Why.”

<sup>176</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

enhanced ebooks,<sup>177</sup> all of which feature only audio and video. Yet, authors and professionals in the field have expressed their appreciation of the enhanced ebook format. A 2014 article in *The Chronicle of Higher Education* praises the format for its ability to include content directed toward more than one audience: creating the much sought-after “cross-over” for publishers.<sup>178</sup> Similar to other marketplaces, publishers have experienced significant financial success in this genre. For instance Touch Press’ 2012 title *The Elements*, an enhanced ebook app by Theodore Gray, sold 250,000 copies at \$13.99 and brought in more than \$2.5 million in revenue.<sup>179</sup>

Despite the promising statistics and positive feedback, 40% of publishers in these markets reported that they have no plans to produce this format in the future (see Figure 4).<sup>180</sup> Admittedly, BookNet Canada’s figures may have changed since 2017. However, with 40% of publishers against producing the format<sup>181</sup> and the recent surge in digital learning platforms and publisher–platform collaborations (e.g., Top Hat’s recent acquisition of Nelson’s higher education textbook titles),<sup>182</sup> it is unlikely that the enhanced ebook format will find any new viable market segments in the scholarly/professional marketplace.

### Trade/Consumer Markets

The trade/consumer markets seem to show the most growth potential with only 16% of publishers currently producing any enhanced titles and 30% of publishers investigating the possibility of producing enhanced ebooks. As the only marketplace with publishers planning to produce enhanced ebooks in the near future (5%; see Figure 3),<sup>183</sup> the main roadblock in these markets is the compatibility between the content and the enhanced format. As it is, the most popular trade/consumer ebook markets are “crime, romantic novels and thrillers via e-reader, according to Nielsen Book International.”<sup>184</sup> Unfortunately, most e-readers do not support enhanced titles, and these genres often feature text-heavy books, which are also not ideal for the enhanced ebook format. In addition, the enhanced ebook format is mostly restricted to fixed-layout titles. This format is structurally different from the typical reflowable genre-novel layout seen with basic ebooks, and the change may not sit well with consumers.

When ebooks were first introduced, *PCMag* revealed that most consumers were of two minds: they either appreciated the enhanced features and how they added value to the text or they found them distracting.<sup>185</sup> With text-heavy titles, the enhancements would likely pull readers away from the story, unless the enhancements were used to augment the plot. For example, publishers could fashion a create-your-own-adventure enhanced ebook, or highlight short bursts of information that would pair well with the enhanced features (e.g., definitions, instructions, illustrations, graphs, images, lyrics, speeches, etc.). Following this train of thought, there are many genres in the non-fiction segment that may do well with the enhanced ebook format: cookbooks, how-to guides, self-help books, journalistic investigative titles, etc. However, the trade/consumer market is the least-tested market for enhanced ebooks, and its success will be comparatively uncertain. As the format is still rather time-consuming (and therefore costly) to produce, it is best

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<sup>177</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

<sup>178</sup> Jacob L. Wright, “What Enhanced E-Books Can Do for Scholarly Authors.”

<sup>179</sup> Alexandra Alter, “Blowing Up the Book.”

<sup>180</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

<sup>181</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

<sup>182</sup> Ryan Porter, “Digital Learning Platform Top Hat to Acquire Nelson’s Higher-Ed Textbook Business.”

<sup>183</sup> BookNet Canada, “The State of Digital Publishing in Canada 2017.”

<sup>184</sup> Lucy Handley, “Physical Books Still Outsell E-Books — and Here’s Why.”

<sup>185</sup> Jennifer Bergen, “E Is for Enhanced: 8 Enhanced Ebooks Worth Checking Out.”

for trade/consumer publishers who are interested in the format to carefully select a title that would best suit the enhanced ebooks' capabilities.

### Educational/K to 12 Markets

Based on BookNet Canada's 2018 report, the educational/K to 12 markets show the least potential with 0% of publishers investigating the possibility of producing enhanced ebooks—despite the marketplaces being the most saturated of the three.<sup>186</sup> However, the market as a whole is healthy, displaying growth in recent years where most other markets were stagnant.<sup>187</sup> If the educational/K to 12 markets are established marketplaces for enhanced ebooks and the markets are growing, then the educational/K to 12 marketplaces will likely host ideal market segments for the enhanced ebook format. In fact, IBIS World's specialized U.S. industry report on children's book publishing noted that "e-books and video books have emerged as interactive mediums for children's literature."<sup>188</sup> Publishers can use this opportunity to continue publishing enhanced ebooks to a welcoming consumer base and raise awareness for the format. As consumer awareness grows and consistent sales tracks are documented, the larger publishing industry can use it as a springboard to promote uses of the format in other marketplaces.

In addition, enhanced ebooks could be a prime format for recent trends developing in the educational/K to 12 markets. Kristen McLean, executive director of business development for NPD Books, noted how trends that were beginning to surface in 2019 were "accelerated by the [2020 coronavirus] pandemic."<sup>189</sup> Between March 1 and April 4, 2020 a *Publishers Weekly* article revealed that, among others, "the study aids segment (early learner and middle school math and science titles) rose 83%; and sales of language arts books for young readers (ages four to eight) jumped 98%."<sup>190</sup> Though this heightened purchasing behaviour may be a result of parents purchasing homeschooling resources for their children, these trends were already emerging before the pandemic. As such, they are a good indication for how the educational/K to 12 markets will likely continue to grow in the future. In the case of the enhanced ebook format, publishers can make the most of these trends by including pop-ups to illuminate on existing content, offer practical video or audio instructional clips, or even provide interactive activities or quizzes to test understanding and recall. These high-value additions to educational/K to 12 titles could incentivize parents to purchase enhanced titles in these growing markets. Unfortunately, publishers will not be the only organizations vying for attention. IBIS World's specialized industry report also revealed that "external competition has increased due to this increasing amount of video and audio media now available through online channels...making it easier for entertainment and educational material to reach children outside of books."<sup>191</sup> This perspective is shared by Noah Genner, CEO of BookNet Canada, and Kobo CEO Michael Tamblin, who agree that the fight for time and attention against entertainment amenities such as streaming services, online gaming, and podcasts will be the biggest challenge facing publishers going forward.<sup>192</sup> Luckily, as a bridge between books and HTML-based content, the enhanced ebook format could be an ideal solution for publishers to compete against new online forms of children's entertainment and learning.

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<sup>186</sup> BookNet Canada, "The State of Digital Publishing in Canada 2017."

<sup>187</sup> Claire Kirch, "Market Research Says Children's Books Up, Overall Market Flat."

<sup>188</sup> Jeremy Moses, "Children's Book Publishing (US SPECIALIZED INDUSTRY REPORT)."

<sup>189</sup> Jim Milliot, "The Pandemic Is Changing Book-Buying Patterns."

<sup>190</sup> Jim Milliot, "The Pandemic Is Changing Book-Buying Patterns."

<sup>191</sup> Jeremy Moses, "Children's Book Publishing (US SPECIALIZED INDUSTRY REPORT)."

<sup>192</sup> Sue Carter, "Kobo CEO Michael Tamblin on Knowing Your Customers – Even When You Can't Predict What's Coming next."

Admittedly, screen time is still a large concern for parents. Reading a print book versus e-reading has the potential to cut out the tactile learning experience that can help foster a learning environment as toddlers begin to grasp concepts and learn words.<sup>193</sup> However, research from the University of Wisconsin showed that the interactive nature of enhanced ebooks connects with children aged two to five on an intuitive level and can be beneficial when they are learning their first language.<sup>194</sup> As a *BBC* article described it, “the more interactive the screen, the more real it was, and the more familiar it felt from a two-year-old's perspective.”<sup>195</sup> For older children, e-reading also has the potential to unlock larger libraries for young readers who may otherwise be limited by financial or geographic constraints.<sup>196</sup> As part of the marketing campaign previously suggested to increase consumer awareness of the format, publishers can assuage parental concern about e-reading screen time to highlight the overall educational benefits (seen even with traditional trade titles) as well as the near-limitless digital libraries available for young readers.

## CONCLUSION

Following its debut, the enhanced ebook and its seemingly endless possibilities almost vanished into thin air. The popularity of the basic ebook, the caution displayed by publishers, and the roadblocks instituted by online retailers and devices culminated into what appeared to be a futile ebook format that had no place in the industry. In the decade since the EPUB3 format was first introduced, the enhanced format has finally begun to gain some traction. However, the potential for growth will only be realized if publishers and the overall publishing industry make concerted efforts to break down the barriers that originally blocked the enhanced format from taking off.

Key players in the publishing industry can conquer these obstacles and resolve many of the format's initial drawbacks. Emerging software has drastically reduced the level of expertise, time, and financial investment required to produce enhanced ebooks. Digital retailers, the gatekeepers for consumer access, can embrace the format by accepting all enhanced capabilities and potentially restructure their online stores to increase classification and discoverability. Publishers can do their part to increase discoverability by agreeing on a label for the enhanced ebook format and best practices on metadata, descriptions, and front cover additions. Retailers and publishers can work together to raise consumer awareness and reinforce the concept of a higher perceived value for the enhanced ebook format. Consumers can continue to support their favourite authors and formats as seen with the recent growth in the educational/K to 12 markets. As a whole, their actions have proven that the educational/ K to 12 markets are ideal marketplaces to continue producing, distributing, and selling enhanced ebooks, as well as potentially acting as a springboard to launch the format into new marketplaces.

That is not to say that the road is clear for enhanced ebooks to take a prominent place in tomorrow's North American publishing industry. There is cause for concern about the enhanced ebooks' pricing structure, as well as how consumers will react to any variation from the common \$2.99 or \$4.99 basic ebook price tag. Subscription services and the management of ebook rights in the future are also significant hurdles that may push for industry-wide restructuring. Finally, shifts in purchasing behaviour from consumers and libraries requires further monitoring. Recent trends in

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<sup>193</sup> Douglas Quenqua, “Is E-Reading to Your Toddler Story Time, or Simply Screen Time?”

<sup>194</sup> Philippa Roxby, “Does Technology Hinder or Help Toddlers' Learning?”

<sup>195</sup> Philippa Roxby, “Does Technology Hinder or Help Toddlers' Learning?”

<sup>196</sup> Philippa Roxby, “Does Technology Hinder or Help Toddlers' Learning?”

consumer book buying and lending behaviour may be indicative of long-term trends or a passing fad in the wake of the 2020 COVID-19 pandemic. Increased digital book orders from libraries and rising tensions between libraries and publishers are also cause for concern for the enhanced format as part of the larger ebook family. However, success stories such as *A Horse Named Steve*, *Galdo's Gift*, and *The Wasteland* give hope to publishers that there is and will continue to be sufficient consumer demand for enhanced ebooks.

As the North American publishing industry moves forward, they must also face rising competition from digital learning platforms and online educational and entertainment services. BISG's 2018 report has already alerted the publishing industry for the need to invest in technology to remain competitive, and the enhanced ebook could be one of the solutions. As the bridge between books and HTML-based content, the enhanced ebook can play to the strengths of publishing's entertainment and education competition and bring consumer attention back to books. As Kaitlin Barnes said, "don't give up on enhanced ebooks yet"—not when there is finally hope.

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