

FROM PRINT TO EBOOK:  
FIRST STEPS AND STRATEGIES

*by*

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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 2013

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## A B S T R A C T

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McKellar & Martin, a small Canadian children's book publisher, converted their first titles from print to ebook in August 2013. They approached the conversion as a pilot project to develop their own digital publishing strategy. This report analyzes the development of McKellar & Martin's strategy from the initial goal-setting to the point at which the ebooks were ready to go to market. The report reviews the publisher's unique context, the audiences they aimed to reach, and the two titles selected for conversion. It provides a detailed account of the conversion process and tactics used, and discusses how McKellar & Martin overcame some unique challenges. The report concludes with recommendations for McKellar & Martin as they begin their ebook distribution and marketing. The aim of the report is to provide small publishers with a blueprint for developing their own digital publishing strategy that will stand the test of time.

**Keywords:** *publishing, digital, YA, ebook, marketing, McKellar & Martin*

## A C K N O W L E D G E M E N T S

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A big thank you to Meghan and Tonya, two inspiring women who took the leap to start their own publishing company because they both love the fine craft of bookmaking. Thanks for understanding that ebook publishing can have its own craft, for letting me experiment with your titles, and for your guidance and support throughout.

Thank you to John, for sharing your incredible knowledge of all things digital, and to Mary, for the best advice ever in editing (and in life): always start by saying something nice.

To my family, to my fellow MPubbers, and to my husband Nate – thanks for keeping me focused when I needed it and distracting me with laughs at just the right times. I'm lucky to have you.

# T A B L E O F C O N T E N T S

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## I N T R O D U C T I O N

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It has been over a decade since ebooks first started making waves in the publishing industry, yet many publishers are still struggling to understand how best to approach digital publishing. The tools and technologies have undergone such rapid change in recent years that it can be tempting to wait for the next big innovation before jumping in. On the flip side, many publishers fear being left behind as more and more readers purchase their first ebooks. In general, the retail price of ebooks is not high enough to represent a stable revenue source, but investment in digital publishing is still expected to pay off in the long run.

This report explores the question of how to implement a digital publishing strategy, from the perspective of a small Canadian trade publisher. Based on a case study at McKellar & Martin Publishing Group, the report analyzes several print-to-ebook conversion options, addresses some common challenges, and discusses future marketing and discoverability approaches. It begins with the decision to convert two young adult (YA) titles as a pilot project, and discusses the overall strategy and specific tactics employed to meet McKellar & Martin's goals.

The focus of the report is on trade publishing, and more specifically on text-heavy fiction titles with fairly straightforward formatting and few images. The digital publishing arena changed dramatically with the introduction of the iPad in 2010, and there is evidence that consumer preferences are moving away from e-ink devices and toward tablet devices. Tablets have opened up myriad opportunities for developing fixed-layout, image-rich books as well as sophisticated interactive apps. However, when it comes to straightforward text, a publisher can develop a reflowable ebook that will work well on both e-ink devices and tablets, and that won't detract from the simple pleasure of immersing oneself in a narrative. This was the case for the titles chosen for McKellar & Martin's pilot project.

The report describes the development of a digital publishing strategy from the initial planning stages right through to bringing the titles to market. Chapter 1 reviews the context of the project, including McKellar & Martin's unique publishing strategy, their target audiences, and the two titles they selected for ebook conversion. Chapter 2 provides an overview of McKellar & Martin's goals for the project, as well as the conversion considerations that were reviewed prior to beginning. Chapter 3 outlines the general process used to bring the titles into EPUB and MOBI format, and discusses how several specific formatting challenges were addressed. Chapter 4 reviews the current state of the pilot project and provides recommendations for distributing and marketing the titles. In general, the report provides detailed documentation of a specific digital publishing project from start to finish.

Although the information included in this report applies to one small publishing company at a certain point in time, the aim is to provide a record of the overall decision-making process. The specific tactics and tools are likely to change over



time; however, the general strategy and process can be applied to similar projects. The report is intended to be of value to small publishers who have not yet embarked on digitization and are looking for information about their options and what to consider before starting out. In particular, it provides McKellar & Martin with an account of their pilot project to date and recommendations for how to approach the next big step, which is getting their new ebook titles out on the market.

Digital publishing is, and will continue to be, murky territory. There are many considerations to be aware of before starting out, the most important of which is understanding why a publisher is producing ebooks in the first place. The report is meant to serve as a sort of trail guide – while you may choose your own path, the markers are here to reassure you that you are still on track.

The decision to embark on a digitization project depends entirely on the business context and the goals of the publisher. McKellar & Martin is a small Canadian children's book publisher with a unique, customized approach to sales. They want to stay competitive in the marketplace and to reach a broader audience. In particular, there is a growing segment of the young adult audience who purchase books in electronic format.<sup>1</sup> McKellar & Martin therefore selected two YA titles as a pilot project for ebook conversion.

### BACKGROUND

McKellar & Martin was started in 2010 by Meghan Hague and Tonya Martin, and it is based in Vancouver. As a two-person business, McKellar & Martin faces a number of challenges in the Canadian market, such as limited visibility, reach and resources. However, given their small scale, they have the advantage of being extremely adaptable, and are able to test out new ventures with minimal risk. McKellar & Martin publish children's books, from board books through to YA titles. Their business strategy is to offer customized publishing for specific programs and organizations, including the educational market. For example, they collaborated with the students and teachers of a school district on Haida Gwaii to publish *B is For Basketball*, the official book of the 2011 All Native Basketball Tournament. McKellar & Martin network with local organizations to ensure that each new title comes with an advance special order.<sup>2</sup> Special sales channels like this allow the publisher to set different terms of sale, such as payment in advance and no returns of unsold merchandise.<sup>3</sup> This strategy provides McKellar & Martin with stability and capital – they do not need to rely on retail sales and they can manage their own distribution, rather than contracting a distributor. In this way they avoid some of the risks of traditional publishing, where the publisher bears the initial investment in production and must wait through long payable periods on retail sales, with the likelihood that the cash owed will be reduced through book returns.<sup>4</sup> It also means that McKellar & Martin invest a lot of time in building relationships with children's organizations and authors, resulting in a small but solid list of titles.

McKellar & Martin's publishing strategy relies on targeted marketing and carefully crafted titles. They aim to reach kids, teens, parents, teachers and caregivers through word of mouth, social media, library groups, school programs and other conven-

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1 Sharon Lubrano, *Book Consumer in 2012: Key Market Metrics – and how 'E' is Changing Everything* (New Providence, NJ: Bowker, 2013), 26.

2 Meghan Hague and Tonya Martin, *Email Interview by Lee Wyndham* (McKellar & Martin Publishing Group, Ltd., September 10, 2013).

3 Mike Shatzkin, "The Future of Books in Stores," *The Shatzkin Files*, July 23, 2013, <http://www.idealog.com/blog/the-future-of-books-in-stores/> (accessed September 14, 2013).

4 *Book Distribution in Canada's English-Language Market* (Vancouver, BC: Turner-Riggs, May 2008), 24-25.

tional and unconventional channels. McKellar & Martin also rely on their authors, who have built their own audiences through promotional work online and in person, and often sell their titles at performance venues across Canada. This helps contribute to a strong and reasonably lucrative backlist, which provides stability for new publishing projects.<sup>5</sup> McKellar & Martin also set out with the goal of supporting the careful craft of bookmaking, with an emphasis on detail and fine touches. Meghan Hague, Publisher and CEO, noted in McKellar & Martin's first news release that they "believe in the pure craftsmanship and art of traditional bookmaking."<sup>6</sup> Tonya Martin, Publisher and Editor-in-Chief, added, "we're keeping the price point of our books at an affordable level. Parents, teachers, and librarians should never be priced out of our market."<sup>7</sup> The small scale of the company, their emphasis on craft and quality, and their relationship with organizations, authors, and readers are all factors that influenced the decision to branch out into a new digital format.

## AUDIENCE

There is a certain amount of skepticism in the publishing industry about the actual impact of digital book sales compared with the initial hype. This is particularly true in the children's and YA market, given the prohibitive cost of ereaders and tablets for younger consumers. Market research in the past few years has shown only slow growth in the digital market. However, "many industry players – agents, booksellers, publishers, and authors – are saying just the opposite: digital sales are booming for YA fiction."<sup>8</sup> A recent BookNet Canada study shows that 27% of Canadian teens have already adopted digital reading. BookNet Canada foresees another surge in ebook reading among teens, and notes that parents who read ebooks "are significantly more likely to predict that their children will be reading 'slightly' to 'significantly' more ebooks in the near future."<sup>9</sup> Bowker research in the US in September 2012 revealed that 23% of all books purchased were ebooks, and 24% of all book buyers purchased an ebook. Significantly, ebooks represented 23% of all YA books purchased, and 29% of all ebooks purchased were bought by youth under age thirty.<sup>10</sup> By November 2012, ebook sales rose to 28.2% of consumer book purchases.<sup>11</sup> There is concern about ebook sales cannibalizing print sales. However, a recent empirical study questioned this and found that while it is true in the case

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5 Hague and Martin, *Email Interview by Lee Wyndham*.

6 Meghan Hague and Tonya Martin, "For Immediate Release," *McKellar & Martin Publishing Group, Limited*, September 15, 2010, <http://www.mckellarmartin.com/2010/09/15/for-immediate-release/> (accessed August 5, 2013).

7 *Ibid.*

8 Karen Springen, "Are Teens Embracing E-Books?" *Publishers Weekly* 259, no. 8 (02/20, 2012): 20, <http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=72093620&site=bsi-live&scope=site> (accessed September 21, 2013).

9 "Children's Uptake on Ebooks Expected to Increase, Says New BookNet Canada Study," *BookNet Canada*, September 16, 2013, <http://www.booknetcanada.ca/press-room/2013/9/16/kids-teens-ereading-study.html> (accessed October 20, 2013).

10 Lubrano, *Book Consumer in 2012*, 26.

11 *2012 Ebook Share of Market and Retailer Market Share Shifts, US and UK* (New Providence, NJ: Bowker, March 16, 2013), 3.

of some bestsellers, “the new electronic format creates an opportunity for emerging niche authors to reach their audience as well as to test new markets and pricing strategies. New readers are also exposed to older titles that benefit from the increasing life ‘on the shelves.’”<sup>12</sup>

Much of the research has focused on adult readers, but teens are in an interesting and somewhat contradictory position when it comes to digital reading. Teens are comfortable downloading, streaming, swapping, and sharing digital content – they aren’t as concerned with holding onto a physical object.<sup>13</sup> Andrew Smith, VP and Deputy Publisher of Little, Brown Books for Young Readers says, “Getting book content online is a natural for teens.”<sup>14</sup> However, the publishers at McKellar & Martin share the general belief that few teens have access to an ereader. Youth are more likely to borrow a parent’s tablet or ereader than to purchase one, or to have one purchased for them.<sup>15</sup> One Bowker survey revealed that twice as many children would potentially read ebooks as the number that already do.<sup>16</sup> It is certainly an area that is poised for growth, especially now that older models are being passed down to kids when parents upgrade their own ereaders and tablets. Ypulse, a youth market research firm, reported that the number of Millennials who own tablets and ereaders jumped significantly from 2011 to 2012, and “those who don’t have a tablet yet want one badly.”<sup>17</sup> BookNet Canada found that the average number of devices in a household is on the rise, where parents report having 6.4 devices per household, and teens report regularly using 4.8 devices.<sup>18</sup> With more affordable devices now on the market and increasing demand for digital content, more and more publishers are jumping in under the conviction that offering ebooks is necessary to stay competitive in today’s marketplace.

Offering digital formats is certainly a way for publishers like McKellar & Martin to build their audience. “E-books provide a way to reach kids who aren’t traditional bookworms,” says Karen Springen in *Publishers Weekly*. “To publishers, teens with new e-readers constitute, in some part, new customers.”<sup>19</sup> Youth who may not go

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12 David Bounie, Bora Eang, Marvin Sirbu and Patrick Waelbroeck, “Superstars and Outsiders in Online Markets: An Empirical Analysis of Electronic Books,” *Electronic Commerce Research & Applications* 12, no. 1 (01, 2013): 58, <http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=85397314&site=bsi-live&scope=site> (accessed October 20, 2013).

13 Sara Lloyd, “Child Benefits,” *Bookseller* no. 5518 (03/02, 2012): 13-13, <http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=73963365&site=bsi-live&scope=site> (accessed September 14, 2013).

14 Springen, “Are Teens Embracing E-Books?,” 20.

15 Diane Roback, “For Children’s, Digital Grows but Questions Remain,” *Publishers Weekly* 258, no. 1 (01/03, 2011): 20, <http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=57235821&site=bsi-live&scope=site> (accessed September 14, 2013).

16 Charlotte Williams, “Lack of E-Reader Access Holds Back Kids’ Digital Market,” *Bookseller* no. 5548 (10/19, 2012): 13, <http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=83832200&site=bsi-live&scope=site> (accessed September 14, 2013).

17 “New Ypulse Report: Technology,” *YPulse*, February 29, 2012, <https://www.ypulse.com/industry/research> (accessed September 14, 2013).

18 “Children’s Uptake on Ebooks Expected to Increase.”

19 Springen, “Are Teens Embracing E-Books?,” 21.

into physical bookstores or libraries are introduced to new titles through online discovery, such as social media channels and fan sites. The other potential new audience for YA publishers like McKellar & Martin is adult readers who buy YA titles for themselves. A 2012 study revealed that 55% of YA titles were purchased by adults aged eighteen or older, with the largest segment aged thirty to forty-four. Furthermore, 78% of the time, these adult consumers purchased the books for their own reading.<sup>20</sup> “The YA market has the largest demographic reach of any category,” says Felicia Frazier, Senior VP of Sales for Penguin Young Readers Group. “You’ve got little kids, eight- and nine-year-olds, some of them reading teen books, and 30- and 40-year olds as well.”<sup>21</sup> YA titles were the most-purchased genre in a recent Bowker study: in 2011, 8% of books bought were YA, compared to 6% for general fiction and 6% for romance.<sup>22</sup> The popularity of YA bestsellers like *The Hunger Games* has helped with the crossover from youth to adult readers, but this trend applies to titles with fewer sales as well. Adult readers of YA titles are particularly likely to seek out ebooks, which can be purchased and read discreetly. “E-books are ideal for adults who feel uncomfortable browsing in the teen section of a bookstore,” says Springen.<sup>23</sup> All in all, with new youth and adult readers, offering YA books in digital format has the potential of greatly expanding a publisher’s audience.

## TITLES

Publishers survive not only through book sales – their real business is exploiting rights, taking one “book” and selling it in as many formats and territories as possible.<sup>24</sup> Ten or fifteen years ago, most author-publisher contracts did not include the specific grant of ebook rights, although they may have included catch-all wording such as the right to publish “in any and all media now in existence or hereafter invented.”<sup>25</sup> As a young publisher, McKellar & Martin have a distinct advantage over many older publishers whose rights contracts predated ebooks. From the beginning, they planned for the possibility that they would produce their own ebooks. In their author contracts, McKellar & Martin have included a clause that gives them the first right to produce a digital version of the title before the rights revert to the author.<sup>26</sup> Provided the publisher has the expertise to produce and market an ebook, there is an advantage to having them do so, as opposed to the

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20 “Young Adult Books Attract Growing Numbers of Adult Fans,” *Bowker*, September 13, 2012, [http://www.bowker.com/en-US/aboutus/press\\_room/2012/pr\\_09132012.shtml](http://www.bowker.com/en-US/aboutus/press_room/2012/pr_09132012.shtml) (accessed October 20, 2013).

21 Springen, “Are Teens Embracing E-Books?,” 22.

22 Kelly Gallagher, *Looking Beyond the Book – Bowker Digital Book World 2012 Keynote* (New Providence, NJ: Bowker, September 24, 2012), 5.

23 Springen, “Are Teens Embracing E-Books?,” 22.

24 Joanna Penn, “The Rights Deal,” *Bookseller* no. 5585 (07/19, 2013): 13, <http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=89743940&site=bsi-live&scope=site> (accessed September 21, 2013).

25 Devereux Chatillon, “Digital Comes to the Book Industry – Ebooks in 2013,” *Computer & Internet Lawyer* 30, no. 6 (07, 2013): 7, <http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=88315713&site=bsi-live&scope=site> (accessed September 21, 2013).

26 Hague and Martin, *Email Interview by Lee Wyndham*.

author taking on those rights. The publisher can package, market, and sell the title across all formats and channels, instead of duplicating the effort for each separate format.<sup>27</sup>

With the rights in place to produce ebooks, McKellar & Martin then considered which titles to select. Their list includes a number of heavily illustrated children's books, which can prove challenging for ebook conversion. Children's books work better as apps, which provide more flexibility with images, animation, and interactivity.<sup>28</sup> Instead, McKellar & Martin selected their two YA titles, *The Darkness Between the Stars* and *Fractured: Happily Never After?*, which have already been published in print form. *Darkness*, written by Julie Burtinshaw, is a novel about teen suicide, told from the perspective of a brother and sister throughout their childhood and teen years. *Fractured*, by Joanna Karaplis, is a modern retelling of three classic fairy tales, in a distinctive voice for twenty-first-century teen readers. Both authors are very active on social media and have worked to build an engaged audience. This was a big factor in the decision to convert the titles to ebooks. The titles are also well suited for the experiment because they have a fairly steady sales history against which to compare any new ebook sales. Last, and perhaps most important, the titles are straightforward and text-heavy. They have a traditional narrative flow and few images, which works well in EPUB format with reflowable text. Although both titles have some unique touches that required special care during the conversion, they were an obvious choice for McKellar & Martin's first ebook titles.

The decision to produce ebooks and the choice of titles to start with were factors of McKellar & Martin's specific context, business strategy, and goals. However, McKellar & Martin is just one among many small publishers in a similar position, weighing the cost of ebook production against the desire to reach a broader audience and the fear of being "left behind" in a competitive online marketplace. It is clear that sales of ebooks will continue to grow, and that YA titles are likely to be especially lucrative, given their potential to cross over to readers of a broad age range. Although the results were not guaranteed, McKellar & Martin decided to forge ahead with their first digitization project.

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27 Sara Lloyd, "Part of the Whole," *Bookseller* no. 5489 (07/15, 2011): 11, <http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=64082679&site=bsi-live&scope=site> (accessed September 14, 2013).

28 Jeffrey A. Trachtenberg, "Kids' Digital Books Take the App Route – Ruckus Media, Others Line Up Titles for Interactive Reading," *Wall Street Journal*, September 15, 2010, <http://search.proquest.com.proxy.lib.sfu.ca/docview/750517662?accountid=13800> (accessed September 14, 2013).

Any number of publishers are jumping into ebook production just because they feel they should, because everyone is doing it. It's easy to take this stance, but publishers run the risk of reaching out to the quickest conversion option and throwing an ebook online, without considering how readers will find it and whether the quality will be up to their usual print standard when they do. The following outlines McKellar & Martin's own strategy and goals for the pilot ebook project. The specifics may not apply to other publishers or to ebooks a few years from now, but the thought process could serve as a blueprint for publishers considering a similar project.

### GOALS AND OBJECTIVES

First and foremost, McKellar & Martin considered the conversion of their two titles, *Darkness* and *Fractured*, as a pilot project. This means that it was a trial run, which they can evaluate and adapt in the future. It proved to be a safer plan than launching into the full conversion of all backlist titles at once – which is an option for publishers looking to save on costs through bulk conversion. The timing worked out well, in that I approached McKellar & Martin looking for an internship opportunity at about the same time as they were planning to produce their first ebooks. Because I had some conversion knowledge, we decided to start with *Darkness* and *Fractured*, for the reasons mentioned above. The overall aim of the project was to develop a conversion process that was low-cost, that suited the context at McKellar & Martin, and that was adaptable for future projects. Framing the project in this way helped McKellar & Martin see the project as one that, while initially small-scale, will continue to be of value as they expand their digital publishing activities.

The conversion project was a test case; however, it was still tied to a number of specific objectives. As a publisher, McKellar & Martin took on the project in order to reach a broader audience, to make their first digital sales, and to use the new ebook format as a sales driver. The audience research described above shows that there are potentially two new target audiences for McKellar & Martin. The first is young adults who are not traditional bookworms, who may be more comfortable or more likely to find reading material online than by setting foot in a bookstore or library.<sup>29</sup> *Darkness* and *Fractured* are well suited to that audience because they both come in short, easily digestible segments. *Darkness* addresses an important issue, teen suicide, that is particularly relevant today given the pressures faced by digitally plugged-in youth. *Fractured* is a lighthearted read, written partly in the form of text messages and blog posts, and therefore an excellent unconventional fit for “non-bookworms.” The second potential audience is adults who read YA ebooks. *Darkness* is a story that can be read on many levels, with an important message for parents as well as adults long past their troubled teens. *Fractured* is a fun new take on the traditional fairy tales that adults today were brought up with. Beyond

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<sup>29</sup> Springen, “Are Teens Embracing E-Books?,” 21.



these two new audiences, offering the titles in electronic format could also broaden McKellar & Martin's regular YA audience and further engage them in an online space.

The second objective that McKellar & Martin identified ties in with the idea of converting the two titles as a pilot project. Having never before offered an ebook, McKellar & Martin currently have no metrics or sales data to measure the impact of the new format. This is a unique opportunity for them to collect digital sales data from the very beginning. This data can then be used as a baseline against which to evaluate future digitization projects. The good news is that each of the major digital retailers (Amazon, Apple's iBookstore, Kobo and Sony)<sup>30</sup> offer sales tracking for publishers. Furthermore, the retailers offer flexibility with respect to pricing, provided the title is priced the same in all competing channels (i.e., a publisher could not sell their ebook for \$4.99 on Amazon and \$9.99 at the iBookstore). McKellar & Martin can therefore experiment with promotions and different price points, and then check the sales data to see what seems to be working. This kind of experimentation is much more responsive and timely in online sales channels than in traditional print sales channels. "With the pricing flexibility built into online bookstores, ebook publishers are free to experiment – charge one price this month, a different price the next – for as long as it takes to find the 'sweet spot' price,"<sup>31</sup> says Beth Bacon, VP of Content Management at Booktrope. The key is to determine specific and measurable goals in advance, to collect data throughout the experiment, and then to evaluate after the fact.

The last objective is to use the launch of the ebooks as a new driver for sales of both the print and digital formats. *Darkness* and *Fractured* have both been previously released in print format, in 2011 and 2010 respectively. Having a new format to promote is likely to bring renewed attention to the titles and to increase sales for both the digital and print versions. The authors, who are both active on social media and on their websites, will play a key role in the promotional activities. Julie Burtinshaw attends writer, school, and library events, where she actively promotes and often sells her titles. Joanna Karaplis works in ebook development and promotion, therefore she has the skills to market the new digital format of her book. In a recent interview on ebook marketing, Karaplis noted that "with all the content out there, the main hurdle is helping readers find out about your titles."<sup>32</sup> McKellar & Martin plan to coordinate with the authors to launch renewed promotional activities across social media channels and within their existing network. When it comes to online discoverability, the goal is to achieve something called a "lift effect," which

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30 Barnes & Noble, while also a major player in digital publishing, is not mentioned in this report because McKellar & Martin could not sell from their online store without a US address.

31 Beth Bacon, "7 Must-Consider Strategies for Ebook Pricing," *Digital Book World*, April 15, 2013, <http://www.digitalbookworld.com/2013/what-is-the-value-of-an-ebook-hint-it-has-nothing-to-do-with-the-cost-of-paper-and-ink/> (accessed September 1, 2013).

32 Carmen Tam, "Children's Ebooks and Digital Marketing: An Interview with Joanna Karaplis of Annick Press," *eBound*, April 30, 2013, <http://eboundcanada.org/index.php/resources/tutorials/169-ebook-marketing-an-interview-with-joanna-karaplis-of-annick-press> (accessed August 26, 2013).



occurs when a launch or other new sales driver helps to raise a title to a prominent spot on the “shelf” (e.g., the top of the search results). This lift effect helps keep titles at the top because the increased visibility continues to improve sales, which in turn boosts the search results.<sup>33</sup> As a self-described “micro-publisher,” McKellar & Martin’s titles are not likely to soar to the top of the Amazon search results; however, within their market scope, the release of a new format is something to get their readers excited about.

## CONVERSION CONSIDERATIONS

The general objective of the project, as described above, was to develop a low-cost conversion process that would be adaptable for future projects. The first decision was whether to convert the titles in-house or to outsource. There are any number of conversion companies, which range from large operations with an overseas workforce like CodeMantra, Innodata, and Aptara, to a host of digital startups like eBook Architects and eBookIt.com. One resource for Canadian publishers looking to navigate this arena is eBound, a not-for-profit organization that was formed to help publishers with digital engagement. Although the field is constantly changing, there are many as yet unresolved issues with outsourcing ebook conversion. The more highly automated processes are cheaper, but are often error-prone and require more of the publisher’s time to check for quality and to correct errors. The more personal, hands-on services are less error-prone, but more costly. McKellar & Martin have few titles on their list, so they do not have the opportunity to take advantage of savings through bulk conversion. McKellar & Martin were also limited in their budget and in the time they had to devote to the conversion project.

Given the context at McKellar & Martin, a do-it-yourself approach seemed the most viable. Originally, they planned to contract their freelance designer for the pilot conversion project. Instead, when I contacted them regarding an internship opportunity, they decided it was a project that I could take on. Among the goals was for the conversion process to be adaptable to future projects. Having this report as documentation of the strategy and tactics is a first step, but without relying on an intern, McKellar & Martin would have to be familiar with the skills required for ebook conversion so that they can contract out the work on a freelance basis. These skills are a working knowledge of HTML and CSS, and familiarity with at least one of the conversion tools listed below. The rest is a matter of research and staying up to date on the various device specifications. The conversion tools are becoming increasingly easy to use and can be used effectively with no knowledge of HTML or CSS. However, that knowledge comes in handy when things go wrong, or when a more sophisticated level of control over the final product is desired. Essentially, the do-it-yourself approach to ebook conversion is only sustainable if McKellar &

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<sup>33</sup> Jim Milliot, “Rule of E-Book Pricing 101,” *Publishers Weekly* 258, no. 31 (08, 2011): 8, <http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=63896588&site=bsi-live&scope=site> (accessed September 20, 2013).

Martin invest in training for themselves or keep in contact with a freelancer capable of doing the work.

After deciding to work with an individual rather than a conversion company, McKellar & Martin reviewed the various free conversion tools now on offer. Two such tools are PressBooks and Inkling. PressBooks is an open source system built off of WordPress. Content authors can copy and paste text from Word or any other source into an online interface, then organize the content, add metadata, and export to EPUB, MOBI, and PDF. The system is very easy to use and requires no knowledge of HTML. PressBooks uses built-in templates that can be customized by changing the theme options in the interface. The exported books have a credit line to encourage support for the open source tool that reads: “This book was produced using Pressbooks.com.” Publishers who do not want that line can remove it for a small fee.<sup>34</sup> Inkling is a similar tool, but designed more specifically for enriched and interactive books that would render well on an iPad, an iPhone, and the web. The online interface, called Inkling Habitat, is an authoring environment that works well for teams who collaborate on content. It has a simple drag-and-drop tool for adding media and separates content into chunks. Inkling includes a sales channel, for which they take a 30% cut, but which allows authors to distribute their content on other channels as well. One interesting feature they offer is sales by chapter, as well as a giveaway of one free chapter as a marketing tool. Inkling is really intended for image- and media-rich titles like textbooks and art books, but they do offer export to EPUB 3, if not MOBI.<sup>35</sup> Both PressBooks and Inkling are excellent options for content authors with little knowledge of coding, who are willing to use built-in, customizable templates.

Two additional conversion tools worth mentioning are platform-specific. The first is iBooks Author, which is designed to help content authors develop image-rich publications that will render well on a tablet. Similar to Inkling Habitat, it allows users to chunk out content, add multimedia, and optimize the display for different screen sizes and orientations. It is a sophisticated tool for authors and publishers who want to take advantage of the unique interactivity features that a tablet allows. However, the system is intended to prepare books for sale on the Apple iBookstore exclusively.<sup>36</sup> The second tool is Kindle Direct Publishing, which is a basic interface for authors and publishers who want to prepare Kindle ebooks for sale on Amazon. Users can upload content from Word, HTML, EPUB, or PDF and then convert to MOBI format. Although the guidelines and specifications are extensive, the tool itself is very clunky and does not have the sophisticated WYSIWYG features of other such tools. Although there are templates to choose from, the user needs some basic knowledge about how to structure content in order to develop a clean-looking book. Like iBooks Author, Kindle Direct Publishing is platform-specific.<sup>37</sup> However,

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34 “Make Books with PressBooks,” *PressBooks*, 2013, <http://pressbooks.com/> (accessed September 14, 2013).

35 “Inkling Habitat,” *Inkling*, 2013, <https://www.inkling.com/habitat/> (accessed September 14, 2013).

36 “iBooks Author,” *Apple*, 2013, <http://www.apple.com/ca/ibooks-author/> (accessed September 14, 2013).

37 “Kindle Direct Publishing,” *Amazon*, 2013, [kdp.amazon.ca](http://kdp.amazon.ca) (accessed September 14, 2013).

for publishers familiar with the Kindle specifications, it can be used as a last step to convert an EPUB file to MOBI format.

One last consideration is that McKellar & Martin wanted their ebooks to work with the majority of devices on the market today, and for the files to be adaptable to future devices. The international standard for digital publications is EPUB.<sup>38</sup> Almost all of the most popular devices on the market today – including Apple’s iPad, Barnes & Noble’s Nook, the Kobo reader, and the Sony reader – use the EPUB standard. The one major exception is Amazon’s Kindle, which uses the proprietary format MOBI. More recently, Amazon also introduced the format KF8, for their Kindle Fire tablets. Fortunately, MOBI (and KF8) can be created from an EPUB file, provided it matches up with Amazon’s specifications. In starting out with their trial ebook conversion, McKellar & Martin decided to use a streamlined production method, in which they would develop one EPUB file that could be converted to MOBI with as few modifications as possible. In that way, McKellar & Martin’s ebooks could reach the most potential readers, by being available on the majority of devices on the market.

At the start of this pilot project, McKellar & Martin had two titles that were already formatted in InDesign for print. They had an intern, myself, with some knowledge of HTML and CSS. And the titles they chose had unique formatting requirements, described in chapter 3, which would require customization. Using PressBooks or InKling would have required copying the content from InDesign into the new interface, re-applying the document structure, and working within the custom themes to get the desired look. Using iBooks Author and Kindle Direct Publishing would have required doubling the work for two device-specific formats, neither of which can be used to create the industry standard EPUB file. Instead, the decision was to work from InDesign and use its export-to-EPUB feature. InDesign has its own limitations for ebook production – it produces a lot of messy code and requires extensive file preparation as well as cleanup after export. However, it does produce an EPUB file that can be cracked open and modified, giving the user direct control over the final product.

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38 “EPUB,” *International Digital Publishing Forum*, December 7, 2013, <http://idpf.org/epub> (accessed September 14, 2013).

## CHAPTER 3 : C O N V E R S I O N

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The following describes, in general terms, the conversion process used, and focuses specifically on the unique formatting requirements of the selected titles, as well as tips for overcoming some common coding challenges.

### PROCESS AND TACTICS

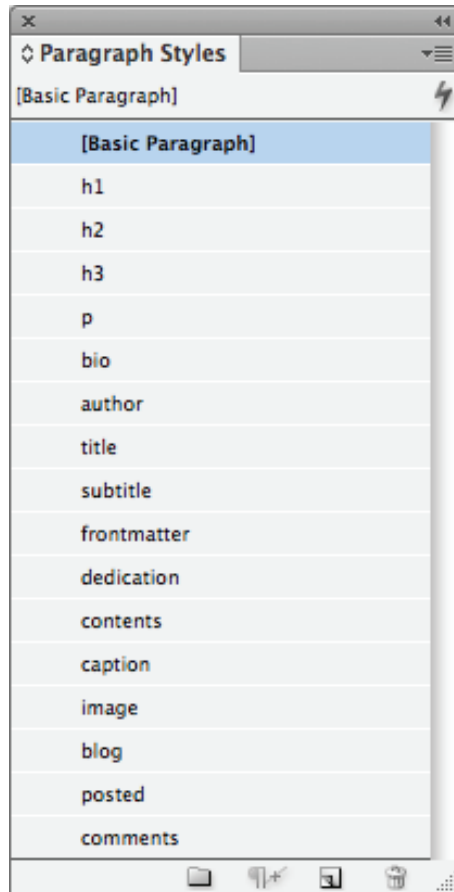
The key to converting a title from a print format in InDesign to EPUB is to do as much prep work as possible in InDesign, but to be prepared to get into the files and clean up the code after export. The first step was to do a trial export of the InDesign print file to EPUB using the default settings – this provided a good sense of what formatting would carry over and what needed to be changed. This step led to a review of the style sheets in InDesign. Both *Darkness* and *Fractured* were designed with style sheets that had been well organized by freelancer Mauve Pagé. The aim was to keep as much of the style differentiation as possible without making the EPUB CSS overly complicated. The minimum number of styles required was determined in advance. The style sheet was stripped down and the styles were labelled to reflect the tags they would become in HTML: H1, H2, p, etc. Figure 1, below, shows the style sheet for the print design of *Fractured* compared to the stripped-down style sheet for EPUB export.

## Style Sheet for Print and Ebook

PRINT



EBOOK



**FIGURE 1:** *Not all of the detailed paragraph styles used in print were needed for the EPUB. The aim was to maintain the expressiveness where needed, but to keep the CSS simple to avoid potential display issues on different devices. The main ebook styles were also labelled with HTML tags for clarity.*

The next step was to change the styling of the headers and body text to how they should appear in the ebook, to save time when working on the CSS. For example, the body text for *Darkness* was changed to Georgia, instead of the print font Mrs. Eaves, which is not a web-safe font and would need to be embedded. One key step was to search for instances where italics or bold were applied as paragraph styles instead of character styles. For example, the designer specified italics in the paragraph style of the *Darkness* diary excerpts. To export properly, these were changed to character styles.<sup>39</sup> A useful custom script called PerfectPrep Text automates this process, but since there weren't many instances it was done using a GREP search instead.<sup>40</sup> GREP is a handy tool because it can find patterns or conditions in a text without requiring an actual word or character of text to search. For example, you can type .\* in the "find" field (to find anything and everything), type \$0 in the change field (to apply the change to everything), select a format to find (e.g., a paragraph style that uses italics), and select a format to change it to (e.g., a character style that uses italics).<sup>41</sup> A number of useful search options have also been built in to the InDesign query field, such as "change dash to en-dash." It is possible to fix up the majority of potential export issues using the Find/Change toolbar, and learning the basics of GREP is highly recommended. After a fair amount of cleanup, the *Darkness* and *Fractured* InDesign files looked roughly the same as they would in EPUB format, which was verified occasionally through test exports.

Following the cleanup, the order and inclusion of content was verified. The articles panel in InDesign can be used to control the order of the content. The front matter and back matter of the books (copyright page, half title, dedication, etc.) required particular attention. These pages were simplified and combined for the ebook versions of *Darkness* and *Fractured*, so that the reader would not need to scroll through as many pages to get to the content. Also, all references to the print product were removed and the ISBN was updated to the ebook number. At this point, the object export options were set for the images, and the images were either included in the articles panel or anchored within the text frame flow. Next, the all-important metadata was included under "File Info" and in the export options dialogue box. Once again, a test EPUB was exported to verify that all content had been included in roughly the format desired.

The majority of the work on McKellar & Martin's two titles was done by opening up the EPUB files and editing them in Dreamweaver. There are a number of tools to use for this editing stage, such as Sigil, TextWrangler, or oXygen XML Editor. I was most familiar with Dreamweaver and decided to use it for two reasons: first, I could set up the EPUB package as a local site to easily move between and search multiple

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39 Elizabeth Castro, *EPUB Straight to the Point: Creating Ebooks for the Apple iPad and Other Ereaders* (Berkeley, CA: Peachpit Press, 2010), Chapter 2.

40 Anne-Marie Concepción, "PerfectPrepText: A Smart Way to Style Local Formatting," *InDesign Secrets*, March 8, 2012, <http://indesignsecrets.com/perfectpreptext-a-smart-way-to-style-local-formatting.php> (accessed July 15, 2013).

41 Castro, *EPUB Straight to the Point*, Chapter 2.

files; and second, because it allowed me to view the code and the design simultaneously. After selecting the editing tool, the next step was to locate the CSS file that was created during the EPUB export. Some of the styling created by the InDesign export required cleanup, and the CSS had to be modified to get the desired clean look. The EPUB files of *Darkness* and *Fractured* were checked repeatedly in Adobe Digital Editions and on various devices. One invaluable tool is a script for compressing and decompressing the file package, called EPUB Zip/UnZip; another is an EPUB validator script for Mac OS, called ePubCheck.<sup>42</sup> Once the files were validated and heavily tested, the EPUBs were converted to MOBI using Calibre, which has a simple interface for creating a MOBI file that will render well in both the original e-ink devices and in the newer Kindle Fire tablets. The MOBI files were then tested on a Kindle reader and using the Kindle Previewer software, and adjusted as required.<sup>43</sup> The overall goal of the conversion process was to develop a clean and simple EPUB file, which would require little adjustment before conversion to MOBI – allowing McKellar & Martin’s ebook titles to render well on the majority of devices on the market today.

## CHALLENGES AND SOLUTIONS

The titles selected for this pilot project had some unique formatting challenges. Each chapter of *Darkness* is told from the perspective of a different character, and the chapter title is that character’s name. Almost all of the chapters feature one of the two main characters, Kate or Cole. The chapters are very short, about 750 words on average, and there are seventy-two of them. The table of contents that was generated using chapter titles therefore displayed a long list of names (Kate, Cole, Kate, Kate, Cole, etc.), which took up a number of pages at the front of the book and detracted from usability. *Darkness* is a novel that is intended to be read straight through; therefore, it was decided that the ebook would not contain an inline table of contents. Instead, the chapter titles of the navigational table of contents were changed to include the chapter number (Chapter 1: Kate, Chapter 2: Cole, etc.). However, the Kindle guidelines require an inline table of contents, so it was included in the MOBI format in smaller font with chapter numbers.<sup>44</sup> In this way, the ease of navigation was assessed in context and adapted based on the requirements of the two formats.

The second title required an entirely different approach. *Fractured* is a collection of three short stories, which are thematically related but can be read in any order. Both the EPUB and MOBI formats therefore included an inline table of contents listing the three story titles, in addition to the navigational table of contents. The

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42 A list of useful scripts for InDesign to EPUB conversion is available at <http://epubsecrets.com/epub-indesign-scripts.php>.

43 Anne-Marie Concepción, “InDesign CS6 to EPUB, Kindle, and iPad,” *Lynda.com*. November 1, 2012, <http://www.lyndacom.proxy.lib.sfu.ca/EPUB-tutorials/InDesign-CS6-EPUB-Kindle-iPad/98834-2.html> (accessed July 5, 2013).

44 Elizabeth Castro, *From InDesign CS5.5 to EPUB & Kindle* (Berkeley, CA: Cookwood Press, 2012), 43.

next challenge was addressing the design decisions that had been made for the print version. Each story had its own look and feel (different fonts, embellishments, etc.). The first and third stories are both straight prose, so they were given the same simple text treatment and design as *Darkness*. Embedding fonts can prove difficult, often requiring hacks for different devices as well as encryption to avoid font piracy.<sup>45</sup> It was decided that the narrative voice and the images that introduce each story would be enough differentiation. However, the second story, “Cyberella,” consists of a conversation via text message between two characters, as well as a series of blog posts. In this case, it was important to distinguish between the two texting voices and to create a look for the blog that would mimic the way it would normally appear online. The character names that introduce each text message were given a sans serif font. One name was styled in black font and the other was styled in grey. This helps the reader distinguish between the voices when reading a long line of texts. The blog posts were then styled using a border above and below certain sections, with sans serif used for the title and comments to give a web feel. Figure 2, below, shows the design of the print book for a section of *Fractured* compared to the design of the ebook. In general, the print-to-ebook conversion required careful consideration of the design decisions made for print and how best to translate those for a digital format, always keeping in mind the need for simplicity so that the book will render well on various devices.

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45 Matthew Diener, “Font Embedding and Font Obfuscation/Mangling,” *ePUBSecrets*, December 5, 2011, <http://epubsecrets.com/font-embedding-and-font-obfuscationmangling.php> (accessed July 19, 2013).



## Sample of "Cyberella" in Print and Ebook

PRINT

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### True2LifeUltimateFanblog.com

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*Posted October 16, 4:36 p.m.*

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Looks like this season's True 2 Life Halloween episode is going to be the best one yet... because YOU could actually be in it! (So there, all you people who complain that reality TV isn't real enough!)

The show has just announced that they'll be filming at the Castle nightclub on Oct. 30, and then airing the episode on Halloween. But if you're not a cast member, the only way to get in is to win one of their VIP passes.

So go to the True 2 Life website and enter now!

I've already scored a media pass (jealous?), so I'll see the lucky winners there. And I better not see any lame costumes... I'll post the pics!

True 2 Life Forever,

Trevor

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#### COMMENTS [67]

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**Oct. 16, 6:33 p.m.**

**CINDY:** hey whats up

**MATT:** oh hey

**MATT:** not much

## EBOOK

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*Posted October 16, 4:36 p.m.*

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True 2 Life Forever,

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**COMMENTS [67]**

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**Oct. 16, 6:33 p.m.**

**CINDY:** hey whats up

**MATT:** oh hey

**MATT:** not much

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**FIGURE 2:** *Many of the styles used in the print version of "Cyberella" were duplicated in the ebook. This was done to help readers distinguish between the blog posts and the text messages.*

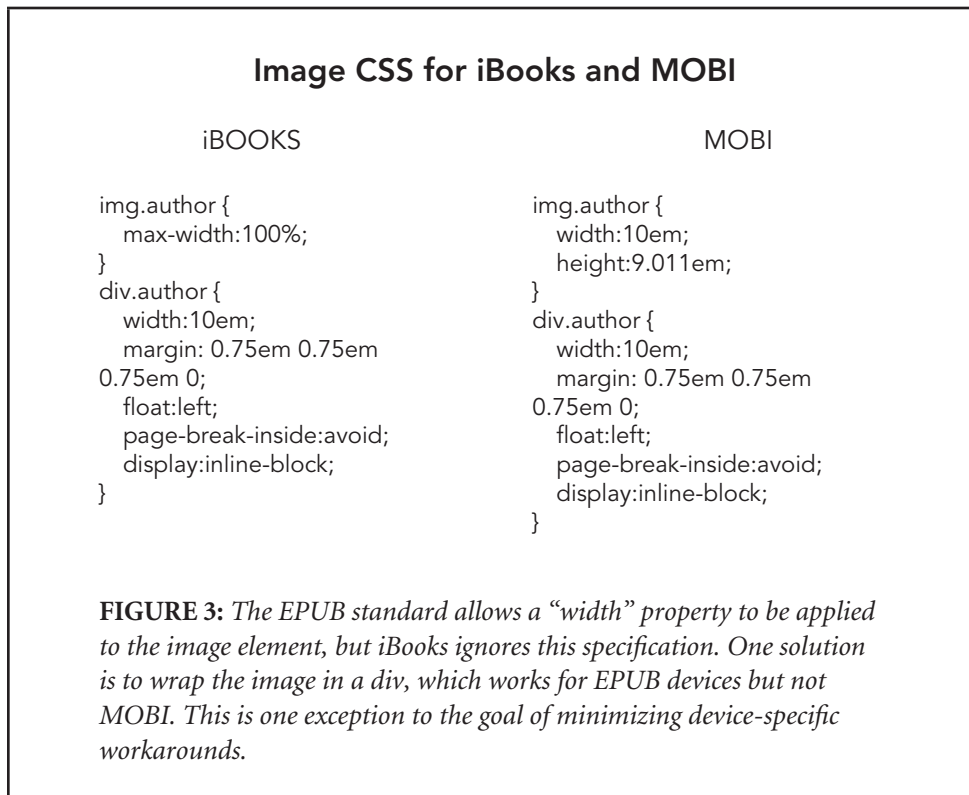
Although making the design decisions was fairly straightforward, implementing them often proved a challenge. There are a number of excellent resources for learning about the conversion from InDesign to EPUB.<sup>46</sup> The trickiest part was working with the few images in *Darkness* and *Fractured*. In InDesign, the object export options were modified to include alt text and to control page breaks and image margins. After export, the image files were replaced with files that had been optimized in Photoshop to the maximum file size and resolution specified by the Kindle guidelines.<sup>47</sup> This avoided issues with down sampling introduced by

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<sup>46</sup> Such resources include Anne-Marie Concepción's blog, [epubsecrets.com](http://epubsecrets.com), and her Lynda.com tutorial "InDesign CS6 to EPUB, Kindle, and iPad"; as well as Elizabeth Castro's blog, [pigsgourdsandwikis.com](http://pigsgourdsandwikis.com), and her book *From InDesign CS5 to EPUB & Kindle* (Cookwood Press, 2011).

<sup>47</sup> "Amazon Kindle Publishing Guidelines," *Amazon*, March, 2013, <http://kindlegen.s3.amazonaws.com/AmazonKindlePublishingGuidelines.pdf> (accessed September 21, 2013), 19-20.

InDesign. The CSS was then modified to set the image width to the flexible “em” unit, so that it would be responsive to each device. Normally, the size of an image can be controlled by adding a width property to the image element in CSS (e.g., `img { width:50%; }`). However, there is a bug within Apple iBooks: properties added to the image element are not recognized. Elizabeth Castro describes a workaround, in which the images are wrapped in a `<div>` tag.<sup>48</sup> The width is then applied to the `<div>`, and the image within that `<div>` is given a maximum width of 100%. In this way the image will fit within the `<div>`, which in turn is limited to the desired width on screen. Unfortunately, the MOBI specifications require the opposite. MOBI ignores width properties on the `<div>`, so this workaround had to be removed. Instead, the width was applied directly to the image element (which is the standard). Figure 3, below, shows the image CSS for EPUB and iBooks compared to the same CSS for MOBI format.



The cover images were also optimized separately in Photoshop to the maximum size and resolution.<sup>49</sup> However, in order for the cover images to resize proportionally for the various devices, they had to be wrapped in SVG code, pictured below in

<sup>48</sup> Elizabeth Castro, “Resizing Images in EPUB,” *Pigs, Gourds and Wikis*, April 19, 2011, <http://www.pigsgourdsandwikis.com/2011/04/resizing-images-in-epub.html> (accessed July 12, 2013).

<sup>49</sup> “Amazon Kindle Publishing Guidelines,” 14-15.

Figure 4.<sup>50</sup> This is just a sample of the workarounds and techniques used to convert *Darkness* and *Fractured* to ebooks. Each title required careful consideration and extensive testing throughout the conversion process to achieve the desired results.

### SVG Code to Resize Cover Images

```
<body>
  <svg version="1.1" xmlns="http://www.w3.org/2000/svg"
xmlns:xlink="http://www.w3.org/1999/xlink"
width="100%" height="100%" viewBox="0 0 1801 2400"
preserveAspectRatio="xMidYMid meet">
  <image width="1801" height="2400" xlink:href="image/Cover.
jpg"/>
</svg>
</body>
```

**FIGURE 4:** *The SVG (Scalable Vector Graphics) code above controls the resizing of the cover image for different devices and platforms. Entering in the original height and width in pixels ensures that the image will resize proportionally, without stretching or distortion.*

The major ebook players will certainly continue to develop and modify the devices available on the market. However, the principles with which this project was approached remain constant and are worth considering in future projects. These principles are:

1. Remember the end user, the reader, when making decisions about structure and navigation;
2. Keep the design touches clean and simple, but add differentiation where it will help clarify the reading; and
3. Aim to convert one file package that will display well on the majority of devices, and keep device-specific workarounds to a minimum.

*Darkness* and *Fractured* were excellent titles to begin digitization with because they provided an opportunity to test out these principles. McKellar & Martin ended up with a set of ebooks in EPUB and MOBI that were ready to go to market.

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<sup>50</sup> This trick is described on the MobileRead wiki at: [http://wiki.mobilerread.com/wiki/Ebook\\_Covers](http://wiki.mobilerread.com/wiki/Ebook_Covers).

Converting *Darkness* and *Fractured* from print to ebooks is only half the battle. The greater challenge lies in distributing the titles across as many channels as possible, and then marketing and promoting them so that they don't languish in online obscurity. At the time of writing, *Darkness* and *Fractured* had not yet been uploaded to the various distribution channels or publicly launched. This circumstance limits any report on the success of the pilot project. Instead, it provides an opportunity to review the distribution and marketing choices that McKellar & Martin now face and to provide some recommendations.

### DISTRIBUTION

There's no question that sales of print books are moving online. A Bowker study shows that 43.8% of books bought by consumers in the US for the greater part of 2012 were bought via ecommerce, compared to just 18.7% purchased in large chain bookstores.<sup>51</sup> Furthermore, over a quarter of all books bought between January and September 2012 were bought through Amazon.<sup>52</sup> It follows that a publisher should offer its ebooks on the major ecommerce sites, including Amazon, despite the proprietary nature of its ebook format. For Canadian publishers, the main sites to look into are the Apple iBookstore, Amazon, the Kobo store, and the Sony Reader store. It is generally agreed that Apple is gaining a higher percentage of the market share for ebooks, while Amazon still holds the majority share.<sup>53</sup> McKellar & Martin planned from the start to offer their titles on the iBookstore and have already set up an account with them through iTunes Connect. Their next step is to upload the EPUBs through an app called iTunes Producer, which notably only works on a Mac. Like the other retailers, Apple requires publishers to have a tax ID and valid bank account, and it pays royalties through electronic funds transfer (EFT). Apple takes a 30% cut of all sales, and requires the price of the book to be no higher than at any other vendor.<sup>54</sup> The upload process is fairly straightforward, and the iTunes Connect interface is easy to use.

To reach the largest share of the market and distribute ebooks through Amazon, McKellar & Martin would need to sign up with Kindle Direct Publishing and upload the MOBI format of the two books. With Amazon, both the digital rights management (DRM) features and the ebook ISBN are optional. Amazon assigns its own identifying number to the title. Significantly, Amazon encourages low ebook prices through its royalty scheme. Amazon will take a 65% cut from all titles

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51 *2012 Ebook Share of Market*, 2.

52 Lubrano, *Book Consumer in 2012*, 13.

53 "Apple iBooks at 24% Worldwide Ebook Market Share? One Analyst Thinks So," *Digital Book World*, February 28, 2013, <http://www.digitalbookworld.com/2013/apple-ibooks-at-24-worldwide-ebook-market-share-one-analyst-thinks-so/> (accessed September 7, 2013).

54 "iTunes Connect," *Apple*, 2013, <https://itunesconnect.apple.com/WebObjects/iTunesConnect.woa/wa/bookSignup> (accessed August 2, 2013).

priced higher than \$9.99, and requires that the ebook be priced at least 20% less than the print book. Publishers are encouraged to price their ebooks between \$2.99 and \$9.99, for which Amazon will only take 30%.<sup>55</sup> As described above, the MOBI format specifications are complex and the Kindle Direct Publishing interface is not straightforward. However, given Amazon's market reach, it is still well worth the effort.

The third biggest player on the market, Barnes & Noble, requires a US address and bank account to distribute for the Nook reader. That was not an option for McKellar & Martin, but Canada has its own successful player, Kobo. Kobo has seen steady growth both in Canada and the US, thanks in part to the fact that it focuses solely on sales of ebooks and ereaders.<sup>56</sup> Publishers can upload their EPUB files to Kobo Publisher Operations. Kobo offers similar price incentives to Amazon – they will take a 30% cut on books priced from \$1.99 to \$12.99, whereas they will take 55% on books priced any higher. They also require the ebook to be priced at least 20% less than the print book.<sup>57</sup> These limitations are important when considering questions of ebook pricing, as discussed below.

The last player worth mentioning is Sony. Sony was one of the first ereader developers on the market. They released their first e-ink device a year before Amazon's Kindle was launched, but their devices have since been outstripped by their competitors.<sup>58</sup> The Sony Reader Store once held a significant share of the market but has been in decline. "In 2011, the company accounted for 28% of all e-readers sold in Canada. In 2012, its presence diminished to 18% and in the first quarter of 2013 dropped down to 12%."<sup>59</sup> Nevertheless, a 12% share is significant, there is little additional work required to publish on the Sony Reader Store, and it provides another discoverability opportunity. Publishers can upload their EPUB format through Sony's Publisher Portal. Sony's terms are similar to the other retailers, but they provide little information up front – they require publishers to sign up for the Portal first.<sup>60</sup> Between Apple, Amazon, Kobo, and Sony, a Canadian publisher can reach the majority of the devices and sales channels available to them.

There are a couple of key decisions to be made at the distribution stage. The first is whether or not to include DRM. There is an ongoing debate about DRM. On the

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55 "Kindle Direct Publishing."

56 Jeremy Greenfield, "Taking another Look at Ebook Upstart Kobo," *Forbes*, August 28, 2013, <http://www.forbes.com/sites/jeremygreenfield/2013/08/28/taking-another-look-at-ebook-upstart-kobo/> (accessed September 7, 2013).

57 "Kobo Publisher Operations," *Kobo*, 2013, <http://www.kobo.com/publishers> (accessed August 2, 2013).

58 Roberto Baldwin, "Sony Reader (PRS-T2)," *Wired*, September 10, 2012, <http://www.wired.com/reviews/2012/09/sony-reader/> (accessed September 21, 2013).

59 Michael Kozlowski, "Why Kobo and Sony are Losing the Digital Race," *Good e-Reader*, March 31, 2013, <http://goodereader.com/blog/electronic-readers/why-kobo-and-sony-are-losing-the-digital-race> (accessed October 19, 2013).

60 "Publisher Portal," *Sony*, 2013, <https://ebookstore.sony.com/publishers/publisherinfo.shtml> (accessed August 2, 2013).

pro side, implementing DRM helps protect a publisher's titles from piracy. It is also quite easy to implement, as most ebook retailers include it as an option when the ebook is being uploaded. On the other hand, DRM measures often frustrate users who have paid for the book and want to be able to use it the way they would a print book – to share it, and to read it in different locations, on different devices. Those who want the book for free will always find a way to circumvent the DRM. On the flip side, if the reader feels the title has value, they will be willing to pay for it. And many consumers pay for titles rather than pirate them because it is seen as the safest, most convenient option, and the prices are generally not prohibitive. Kobo is probably the least restrictive when it comes to DRM, allowing users to transfer their books between devices using the Kobo app – only heavy duplication of titles is flagged as a potential piracy issue. Other ebook vendors are taking a unique “morality” approach to DRM by adding a watermark or other personal identifier to show that the book can be traced back to the purchaser.<sup>61</sup> For example, Enthril, a company that offers ebook gift cards at brick and mortar stores, adds the purchaser's email address to the inside cover of the ebook. This is intended to discourage piracy but to still allow the user to read the book on any device. DRM is murky territory, but worth looking into to keep honest readers happy and coming back for more titles.

The second key decision is pricing. As discussed, pricing is flexible even after the title is up for sale, and experimentation can help a publisher figure out the “sweet spot” price – low enough to increase sales, but not so low that the added sales won't contribute to the bottom line. Short-term offers of free or heavily discounted titles can also help with book promotion. The biggest restriction is the non-compete clause that retailers use to ensure the book is not priced higher on their platform than it is elsewhere. The next restriction is the maximum price at which the retailer still offers a reasonable royalty rate, which for Amazon is \$9.99. Unfortunately, consumers have been taught to see digital media as cheap and disposable, and this has had an adverse impact on the publishing industry. Most consumers are unaware that the cost of printing is only a small fraction of the cost to produce a book – other production factors such as editing and design require heavy upfront investment. For that reason, ebooks are not cheap to produce. Publishers have a role to play in educating the public about the true production costs of both print and digital books.<sup>62</sup> At the moment, the low retail price of ebooks is not an accurate reflection of their value, and is one of the reasons why many publishers have not yet taken the risk of getting into digital publishing. McKellar & Martin's two titles, *Darkness* and *Fractured*, both retail at \$12.99 in paperback. In determining the ebook price, McKellar & Martin must weigh the perceived value of the content with the restrictions of the retailers and the general expectations of consumers. Their

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61 Matteo Berlucchi, “More on DRM,” *Futurebook*, January 29, 2012, <http://futurebook.net/content/more-drm> (accessed August 2, 2013).

62 Random House took a step in this direction by releasing a video that describes the full production process: [http://www.youtube.com/watch?feature=player\\_embedded&v=4FlnAFH4HV4](http://www.youtube.com/watch?feature=player_embedded&v=4FlnAFH4HV4).

current intention is to price the ebook titles at \$7.99, which is comparable with market standards.

One final consideration is whether to include direct sales via the publisher's own website. This sales channel is recommended, because it gives the publisher the opportunity to build direct relationships with their readers. Any promotional activity, whether in person or through social media, will direct the reader back to the publisher's website. The tools for offering ecommerce are getting more straightforward every day. The simplest is to add a PayPal button to the website, which is what McKellar & Martin have done for their print book sales. Another option is to link to the other retailers like Amazon and Apple. However, doing this means that the publisher must pay royalty to the retailer on the sale. Lastly, offering the ebook for direct sale from the publisher's website allows the publisher to test out a retail price higher than the \$9.99 cutoff imposed by retailers. Pricing the ebook on par with the print book would contribute to the consumer education described above, but there is a risk of losing sales to other channels. Publishers have full control over direct sales and can choose the pricing strategy that best suits their objectives.

## MARKETING AND DISCOVERABILITY

Once McKellar & Martin have uploaded *Darkness* and *Fractured* to as many distribution channels as possible, their next challenge is to get the word out about their titles. The following are some recommendations for McKellar & Martin and other publishers embarking on the marketing and discoverability stage.

The most basic and important first step is to include full metadata. Metadata is all of the back-end information that helps search engines, and thus readers, find book content and understand what it is. Nielsen ran a study of the impact of metadata on book sales in the UK. They found that book records that included all of the Book Industry Communications (BIC) basic data attributes (ISBN, title, publisher, date, etc.), as well as an image, sold 473% more than records that had incomplete data or no image. Furthermore, book records that included "enhanced" metadata elements (such as a description, review, and author biography) sold on average one thousand more copies than those that included only basic data.<sup>63</sup> It is in a publisher's best interest to include as much metadata as possible, and this is especially true for ebooks. Since readers can't pick up an ebook, flip through it, and read the back cover blurb, their purchasing decision is based on the information they can find about the book online. This is the premise behind Amazon's "look inside the book" feature, which allows readers to sample the content before purchase. Interestingly, all Kindle books sold through Amazon automatically include this feature. BookNet Canada found that "both parents and teens are actively seeking out information on books and authors online. Forty-three percent of parents currently read a sample

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63 Andre Breedts and David Walter, *White Paper: The Link between Metadata and Sales* (Surrey, UK: Nielsen Book, January 25, 2012), 3-5.



chapter online before purchasing a book.”<sup>64</sup> Publishers may wish to apply this marketing strategy by offering a sample chapter or excerpt from the book, either on their own website or through the author’s online engagement activities. At the very least, uploading robust metadata to the various distribution channels – including in particular the cover image and jacket description – is an important first step toward discovery.

Even with complete metadata in place, it can be a challenge to understand how consumers hear about new titles, where they purchase them from, and how best to reach out to them in the infinite online world. In some ways, digital discovery is much like traditional print discovery. The top awareness factor that drove ebook purchases in the US in 2012 was personal recommendation.<sup>65</sup> Likewise, consumers discovered YA fiction primarily by personal recommendation (18%); the other two most likely methods were in store (9%) and online (7%).<sup>66</sup> In a BookNet Canada study, “almost 70% of teens said they had ‘definitely’ or ‘possibly’ received a recommendation from a friend or relative”<sup>67</sup> about a recent title they read. This reveals the importance of word of mouth, which today does not have to happen in person – consumers also trust the recommendation of friends on social networks and forums.

Interestingly, the number one factor for readers deciding to purchase an ebook after discovering it was the author.<sup>68</sup> A small publisher like McKellar & Martin can capitalize on their authors’ built-in audiences, as well as less conventional, online marketing methods to generate buzz about their new ebook (and print) titles. YA audiences in particular are quick to engage with online marketing and are more comfortable with advertising than adults, provided the advertiser offers something of value to them. “Publishers are finding that e-books are easy to market – with giveaways, digital samplers, and pre-publication teasers,” says Karen Springen in *Publishers Weekly*. “YA marketing teams are capitalizing on kids’ openness to innovative promotions.”<sup>69</sup> Pricing is an interesting area for experimentation with youth audiences in particular. Teens are attracted to low prices and free copies, which can ultimately help with sales of later titles at regular prices. This works particularly well for titles in a series.<sup>70</sup> The advantage of the digital marketplace is that it is relatively easy to run marketing and pricing experiments, provided the publisher has the time to invest in tracking results. Again, the flexibility of small publishers like McKellar &

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64 “Children’s Uptake on Ebooks Expected to Increase.”

65 Lubrano, *Book Consumer in 2012*, 9.

66 Gallagher, *Looking Beyond the Book*, 25.

67 Pamela Millar, “No Ads Allowed: The Next Generation of Book Discovery,” *BookNet Canada*, September 23, 2013, <http://www.booknetcanada.ca/blog/2013/9/23/no-ads-allowed-the-next-generation-of-book-discovery.html#.UmPyNiTKsVI> (accessed October 20, 2013).

68 Lubrano, *Book Consumer in 2012*, 9.

69 Springen, “Are Teens Embracing E-Books?” 22.

70 *Ibid.*, 21.

Martin can help to counteract the disadvantages of being a small fish in the big business of book publishing.

All of the work that goes into converting a title and uploading it for sale is insignificant when compared with the work involved in building an audience for the titles. In the case of McKellar & Martin's *Darkness* and *Fractured*, much of the publicity work was done for the initial launch of the titles in print. McKellar & Martin plan to use the ebook launch as a new driver for sales. Pulling off a successful launch requires a fair amount of creativity, but it really comes down to the people involved. Generating the much-desired "buzz" can seem like an elusive goal. McKellar & Martin would do well to fully leverage their network of readers, authors, and publishers, but the time and personal attention required is significant. One useful marketing tactic is to develop a profile for the customer you are seeking to reach. Make it as detailed as possible – include demographics and psychographics, as well as what the person needs and wants, and what their online habits are. This can help with discovering creative ways to reach that person. McKellar & Martin may benefit by focusing specifically on the new audiences identified above – reluctant teen readers and adult readers of YA ebooks – in addition to their usual audience. Another tactic is to identify the influential bloggers and online personalities to pitch for reviews. The key in this, as in everything, is to make it personal. The time invested in getting to know what might pique the interest of these individuals will be well worth it. *Darkness* and *Fractured*, newly reinvented as ebooks, will only receive as much play in the market as the time McKellar & Martin are willing to invest in helping readers find out about them.

## C O N C L U S I O N

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McKellar & Martin's first digitization project was a low-risk opportunity to experiment with a new format. They had an intern with the basic knowledge required and two straightforward YA titles to convert as a pilot project. McKellar & Martin now have an EPUB and MOBI format of each title that are ready for distribution. The real advantage in this case is that as a small publisher, they can be flexible and try out different marketing and distribution approaches to see what works best. On the flip side, the challenge is that as a two-person team, Hague and Martin have a limited amount of time and money to invest in the next steps.

At the start of the project, McKellar & Martin set out with the general objective of developing a low-cost conversion process that was adaptable for future projects. Given the small scale of the project, it made sense for them to develop an in-house process rather than to hire a large conversion company. Unfortunately, this "in-house" person was myself, an intern with only a short amount of time to contribute to the project. McKellar & Martin's conversion strategy is not sustainable, as it now depends on the availability and affordability of a freelancer. But this is the reality for many small publishers, until the revenue from digital publishing is high enough to truly make it worthwhile to bring the knowledge in house. Luckily the DIY conversion tools described above are getting simpler, and I would encourage small publishers like McKellar & Martin to try their hand at their own ebook conversion.

In terms of the actual conversion, I started with InDesign print files and used Dreamweaver to clean up the files after export. Having some basic knowledge of HTML and CSS, this seemed like the most straightforward option. The disadvantage was that it took quite a lot of time and research to fix bugs and to get the ebook files working smoothly on different devices. Perhaps the tips described above will prove useful to others working on similar projects, and the approach is more likely to be successful when undertaken by those with a bit more experience in InDesign and Dreamweaver. In taking this approach, McKellar & Martin learned a great deal, and I found that it did give me more control over the final product. This was particularly important for the two titles selected, because the design decisions had a real impact on the reader experience. But for anyone working with an even more straightforward text-only title, a tool like PressBooks would be best. The time required to copy the text into the interface is insignificant when compared with the time saved by using their built-in templates. These tools are becoming more sophisticated and provide a quick and low-cost conversion option.

For the pilot project, McKellar & Martin's objectives were to reach a broader audience, to collect and analyze data from their first digital sales, and to use the launch of the new ebook format as a sales driver. The first challenge in evaluating their success is that we did not reach the point of distributing the ebook titles. More important, however, had we reached that point we still would not have been able to evaluate the project because the goals are not sufficiently specific or measurable. Still, it is not too late to change them. For the first objective, the research above

shows that McKellar & Martin have two potential new audiences: reluctant teen readers and adult readers of YA ebooks. They could develop a marketing plan to target each of these audiences with quantifiable objectives. For example, they could find twenty-five influential adult bloggers of YA fiction to pitch for a review, aim to get five reviews, promote those reviews on social media with a giveaway, and then measure the conversion rate. The second objective just needs some specifics. McKellar & Martin could gather their print sales data and set corresponding objectives for digital sales. They could then run an experiment to see what price point best achieves those sales goals. The last objective also needs to be tied in to concrete sales goals, which can be done by developing a digital launch plan and tracking the sales of both the print and ebook formats before and after the launch. Goal-setting is the most important step in a pilot project because it can help a publisher truly understand what is working and not working, which will save them time and money in the long run.

A digitization project has very little to do with the nuts and bolts of conversion. The real question is what to do with the ebooks once completed. Online discoverability is a real challenge; simply posting the ebooks at different retailers will do next to nothing for sales unless it is accompanied by vigorous promotion efforts. I strongly recommend that McKellar & Martin put the time into developing a marketing strategy for their new ebooks. For a small publisher, the best approach is to use personal and creative promotions – this takes more time up front but can be done with little to no budget. Because McKellar & Martin saved by having an intern do the actual conversion, they may be able to hire a freelancer to do some of the hands-on marketing work. And of course they can leverage the authors to work with them on each step of the marketing strategy. McKellar & Martin are now presented with an opportunity to reach a broader audience, but they will only have as much success as they are willing to invest in the discoverability of their new titles.

There is no question that the ebook landscape five or ten years from now will look nothing like it does today. We can't imagine the ereaders of the future or plan for our digital files to work seamlessly with them. But perhaps publishers like McKellar & Martin will read this report as encouragement to take the first steps toward digital publishing. The decisions and rationale will hold true, even though the specific tactics may apply only at this point in time. There will always be a place in the world for a good story, no matter what form it takes.

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