Public Opinion on the Value of Books in the Education Book Sector

Submitted to:

The Book Strategy Group
Attention: Carolyn Wood
Executive Director
Association of Canadian Publishers

EKOS RESEARCH ASSOCIATES INC.
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ACKNOWLEDGEMENTS

Study Products:
This Public Opinion on the Value of Books in the Education Book Sector Report is one of five documents produced for this study. The other four documents include reports on:

- ◇ Marketing, Library usage, illegal downloading and publishing
- ◇ Usage and Value
- ◇ Appendix Material: Consultation Instruments
- ◇ Summary Report

1. INTRODUCTION

The Book Strategy Group (BSG), an ad hoc committee representing the interests of Canadian writers and publishers, commissioned public opinion research on current attitudes of English-speaking Canadians about the cultural and economic value of written works. The research explores matters of pricing, copyright law, file-sharing, ownership and lending models, as well as views on Canadian content, and assessments of knowledge and valuation of self-published books and traditionally published books. This report presents the findings from public opinion research with stakeholders in the education sector.

1.1 STUDY BACKGROUND AND OBJECTIVES

The goal of this research is to understand the value – social, cultural, economic – that English-speaking Canadians place on books. This research will be used to provide direction to the book industry in its efforts to better engage key influencers and to increase the sustainability and competitiveness of Canadian publishers and writers. This research may be used to inform:

> ongoing public conversation with creators, producers, readers, educators, etc.;

> development of new business models that more accurately reflect demand;

> public awareness campaigns;

> redirection of resources to formats or distribution systems that better serve changing tastes and public interest; and,

> additional research on specific issues emerging from this process.

This report describes two qualitative research components with education stakeholders and post-secondary students, as well as a survey conducted with the Canadian public.

2. METHODOLOGY

2.1 EDUCATION SECTOR CONSULTATION

In order to yield insight into how the education sector (stakeholders in primary, secondary, and post-secondary schools) value books, EKOS undertook focus groups with post-secondary students and interviews with stakeholders at all levels of education.

a) Focus Groups with PSE Students

Focus groups were conducted with post-secondary students in the same four cities where general public focus groups were held, as follows:

- Ottawa - Wednesday, June 4, 2014, 7:30 pm. 7 participants

- Winnipeg - Thursday, June 5, 2014, 7:30 pm. 7 participants

- Calgary - Thursday, June 12, 2014, 7:30 pm. 5 participants

- Halifax - Tuesday, June 17, 2014, 7:30 pm. 11 participants

Participants were recruited using a third party panel (UThink). A distinct focus group guide was developed for the discussion with students. All other protocols for conducting the student focus groups were the same as for the groups with the general public (see report of findings from focus groups with the general public, under separate cover).

b) Interviews with Education Stakeholders

Key informant interviews were contacted to gain an understanding of the perceptions and opinions of individuals who have knowledge of how books are purchased and used in the education sector. The objective of this line of evidence is to ascertain how the education sector perceives and values books, with a particular focus on issues of copyright and interpretation of fair use, as well a consideration of how purchasers and end users value Canadian versus foreign authorship.

A key informant interview guide was developed to explore key study issues relevant to the education sector. The guide was refined and finalized with the approval of the BSG study team. The guide was then customized for each of the various categories of respondents. Interviewees were provided with a copy of the appropriate interview guide in advance of their interview so that they had an opportunity to review the questions and consider their answers.

A list of interview subjects was developed by EKOS in close consultation with the BSG team. Interviews were completed with 18 interview respondents. Each interview was approximately 30-45 minutes in length, and all were conducted by telephone. Categories of interview respondents include representatives from the following:

> Library and information science professionals (n=4)

> Post secondary students' associations (n=3)

> Post secondary institutions (n=2)

> Primary and secondary institutions (n=2)

> Copyright specialists (n=2)

> Post secondary publishers (n=5)

2.2 SURVEY METHODOLOGY

The methodology for this survey involved a nationally representative survey of 1,590 Canadians 18 years of age and older. The sample was drawn from all provinces and territories, including Anglophones in Quebec, and was stratified to include a higher-than-representative portion in the smaller provinces of the country (Saskatchewan, Manitoba and the Atlantic Provinces). This sample size yields a level of precision of +/-2.5 per cent for the sample overall and +/-7 to 11 per cent for most sub-groups that could be isolated in the analysis (including age and gender segments, etc.).

The survey took an average of 18 minutes to administer. The survey was collected over roughly ten days in October 2014. The response rate for the telephone survey was 18 per cent. Two other reports generated under the current study provide greater detail about the methodology used as well as the composition of the survey sample.

3. FINDINGS

3.1 USE OF BOOKS IN THE EDUCATION SECTOR

a) Assigned Reading

Most interview respondents described the bulk of academic work done by students as heavily reliant on books in some form, with the amount of book reading dependent on the level of education and subject. In K-12, there is a strong focus on a consistent approach to the curriculum. Some interview respondents said that teachers and library staff are largely responsible for the selection of books. Some provinces also have organizations that provide supporting information on recommended reading, such as the Educational Resource Acquisition Consortium in British Columbia.

Many interview respondents noted that in PSE the curriculum development is left largely to the course instructor. Sometimes this is done in collaboration with the department or wider institution. Programs such as mathematics and sciences primarily involve conventional text books; whereas social sciences and humanities require greater emphasis on journals. Most of the educational material required involves assigned reading, most notably in undergraduate studies. In a graduate program, there is a greater freedom of choice in the reading material and greater focus on accessing journal articles.

Most interview respondents described the PSE environment as having changed with respect to the way students interact with books. Most indicated that undergraduate students are expected to read a substantial amount during their studies, but it is often not expected that students read entire books cover to cover. For example, students can be assigned excerpts of monographs or text books (rather than an entire volume), often arranged in course packs or provided digitally (e.g., individual links or files for download). A few interview respondents noted that there is growing pressure for universities and colleges to demonstrate learning outcomes, and less focus on hours in spent in class or number of books read. Some respondents said that as evidence of this, online teaching tools have increased in importance, possibly encroaching on the role of books in imparting knowledge.

b) Spending on Books for School

Most PSE students who participated in the focus groups said that the overall cost of books for school is expensive, and most expensive for some students in their first year of studies (described by some as "a shock"), although some also said that books are expensive every year. Some said that they see the cost of books as going up over time; while others described a status quo from previous years. Textbooks in fields such as science, engineering, medicine, and business were among those noted for being most costly; books for arts and humanities were reported to be less expensive and allow for the opportunity to find cheaper alternatives.

Some PSE students said that they buy used books to save money. This was noted to be easier in certain courses such as calculus, English, and history, where foundational books are often not difficult to find as a used version. Even if a text book has had updates, some students will prefer to buy a used, older edition to save money, with many students feeling that updates in new versions are largely superficial. On the other hand, some said that they prefer buying books new to ensure they have the latest edition or to have a "clean" copy with no prior notes or highlighting in them.

Most PSE students indicated that they are most inclined to buy books they feel they will need later on, such as introductory books in their field of study. Some reported that they defer buying the textbook (whether new or used) until they go to the first class and gauge the importance of the book to the course based on the instructions of the professor and their teaching style. Some students said they find that a book is sometimes listed as required but they feel they can get by without it, using only notes from the class. In some cases, participants said that professors take exam questions directly from the book, and therefore the book is necessary to pass the course. A few said that they buy all the books on the reading list every session, but that they may only use about half of the books. Almost all students expressed frustration over buying a book that was only partially used during the course.

Most interview respondents said that spending for books in the education sector has changed notably over time. Representatives of the publishing industry noted that revenue has decreased in the last two decades and most sharply in the last ten years. Interview respondents from K-12 institutions indicated that public spending on education has decreased, resulting in less funding available to purchase books. Some noted that the cost of PSE texts have increased, resulting in students purchasing fewer books but spending the same amount overall. These interview respondents feel that the decreased purchasing of print books has resulted in increased interest and use of other available formats such as online content to support learning.

c) Sharing Textbooks

Most PSE students described a strong preference for buying all of their required books, rather than renting, sharing, or sourcing them for free, in order to ensure that they have convenient access to them when they need them. (One interview respondent articulated, however, that the concept of buying books for PSE feels somewhat unnatural to new PSE students who have grown up used to sharing books or having the cost of books covered in the K-12 level.) Students described several advantages to buying books, including having a clean copy that they can freely mark up with their own notes, and being able to keep their books indefinitely for anticipated future reference. They say they are more apt to share class notes, exams, and study sheets with classmates than they are to share textbooks. Some have shared a textbook at some point with a friend or classmate as a way to get around buying books. Only a few described this as a successful experience and said they are still open to sharing books when feasible, especially if they feel they would not want to refer to the book after the course. Most, however, said that sharing a book was not ideal, as the book may not have been available when needed. A few said that they have borrowed books from friends who have recently completed the same course, and a few described student societies with programs offering students the opportunity to donate texts for others to borrow; these were regarded as better arrangements than sharing books with classmates

d)   Purchasing Textbooks

Most PSE students in the focus groups described purchasing physical textbooks as an investment. They value being able to keep books to add to their personal library for later reference. Some noted that if the price of a physical textbook was not so high, they may be more inclined to keep it rather than try to sell it. For example, it was described as "not worth it" to try to sell a $60 textbook (from which they would expect half the initial price, or less), but a $260 textbook is worth reselling. Some students indicated they do not like re-selling their textbooks at the campus bookstore, feeling that they are "being ripped off twice" with the initial purchase and then with the re-sale back to the bookstore. Instead, some prefer student-run consignment models where they feel that they get a better price.

Some students will avoid making their initial purchase at the campus bookstore because of what they perceive as high markups on books (as well as other products; according to one student, "Even a pen from the campus bookstore costs more than elsewhere"). Some said that they will go to Chapters or Amazon for the book (though a few mentioned the disadvantage of waiting for delivery for online orders).

e)   Book Choices

PSE focus group participants said required books are chosen by the instructor and feel the choices are based on the subject matter, latest research, and geographic considerations (e.g., local authors or relevant regional theories). Many said that cost is rarely a consideration when instructors are choosing books. Most feel that instructors should think about the price of textbooks when planning their courses, suggesting that instructors should use less expensive editions of textbooks, correlate lectures more with textbooks, use more of the material in an assigned book, and consider the ability of students to re-sell or use the book in subsequent courses.

That said, some students said that instructors are considerate of how much books cost students. A few recounted experiences of instructors giving away books to students because they get free copies. Some students described instructors who choose books based on what is available for a less expensive price (e.g., choosing a textbook that is available used) or making portions of textbooks available in an alternate format (e.g., sharing PDFs of certain chapters in an online course management system). A few indicated that instructors sometimes reserve a copy of a book in the library. A few said that instructors are putting the most important information in their lectures so that there is less need for students to buy the book, or that course content focuses on the professor's own unpublished research.

f)   Digital Books

While many PSE student focus group participants do at least some of their assigned reading digitally, most indicated that they prefer a physical or "hard copy" book for educational use over digital or "e-books". Many said that they like versions of physical textbooks that have online add-ons, such as additional information, charts and diagrams, learning tools, sample test questions, or even a complete version of an e-book to match the physical book. Many said they prefer physical books over e-books for a variety of reasons:

› some need physical books for taking into exams (electronics are not permitted in exam room);

› easier to mark-up/highlight;

› easier to find what they need/search the book;

› they want a permanent copy to keep on their shelves to reference in future;

› they like the durability of physical books, and formally bound (rather than sections);

› the lack of permanence or tangibility of e-books takes away from their value (perceived to be not worth as much as physical books);

› easier to read, less eye strain than staring at a screen;

› they feel that they do not study as well with digital books; and,

› impossible to sell e-books.

A few students said they avoid getting books in hard copy if possible and generally prefer a digital copy. These students described the merits of digital books as:

› more lightweight than physical books, easier to have on hand at school, study area, or at home;

› easier to mark-up/highlight (also noted as a benefit of physical books), search for key words;

› sometimes less expensive than textbooks; and

› able to be returned on Amazon within a certain timeframe.

Most interview respondents agreed that a clear change in the five years has been the emergence of digital books and material for educational use. One interview respondent noted that "there is a strong drive toward interactive, educational learning materials" with an expectation that material for students and teachers can be multi-media. PSE interview respondents noted that students are increasingly technologically savvy, with many students taking notes electronically in class. According to one interview respondent, "It is really clear in the last five years that there is massive reform in the education sector in ease, speed, and cost of access for students." While digital books have advantages such as ease of transport and accessibility, the rate of adoption of digital books, according to a few PSE interview respondents, has depended on factors such as price, the ability to download updates, and the ability to re-sell a digital license, if desired.

Library representatives from both K-12 and PSE noted that institutions are centrally purchasing digital books and licenses from a variety of publishers. A few library representatives indicated that while there is still an appetite for traditional print books, there is a shift toward digital books (with journal articles moving toward almost entirely digital access). Reasons noted by librarians for the shift toward digital books is primarily convenience: students do not have to physically come to campus to access them, they can avoid the bulk of heavy books; and some digital books allow for functions like text searching, text mining, highlighting, and annotating. One library representative noted that adoption of e-books has varied by discipline, with instructors in the arts being less likely to use digital books than those in the sciences. Another library representative noted that there has been pressure on PSE libraries to cut back on acquiring print books, saying that "Budget lines look a little better when digital access to material replaces the older hard copy versions."

While the emergence of digital books has been notable, some interview respondents said that digital books have not been fully embraced. As mentioned by some respondents, not all students prefer to read and study digital material. In K-12, some schools lack the infrastructure to provide students with tablets or e-readers, power sources, and internet connectivity. Interview respondents were divided on the benefits of digital books in the educational sector; for example, one indicated that "we don't know what digital does for student engagement and learning", while another said that student "understanding is better if they have read the print book".

3.2   CANADIAN BOOKS IN EDUCATION

PSE students reported that in their academic reading they are exposed to Canadian authored or published books; however, the extent to which they encounter Canadian books depends greatly on the course or subject. Some students said in science, math and engineering courses, American textbooks are often used, but they do take notice when a Canadian textbook is used. PSE students said they are appreciative of Canadian textbooks, particularly in certain fields where there is a need to use Canadian-specific content (such law or health care), and where there is a need for relevant units of measure. For other fields where regional differences are less stark, most students feel that as long as the textbook is applicable and relevant to their learning, it is not necessary that it be Canadian. Particularly for undergraduate studies, it is more important for book content to be useful, current, and aligned with their teaching method than for it to be Canadian.

Some PSE students have observed that Canadian books are less expensive than equivalent US versions. For those who believe the price of a Canadian published textbook is higher, a few said that they see this as "justified" if they feel they are getting a truly Canadian product (e.g., created in Canada, by Canadians, supporting Canadian jobs), but not justified if the book is simply an edition of an American book. A few said "it makes me feel better" if a book makes cultural references unique to Canada.
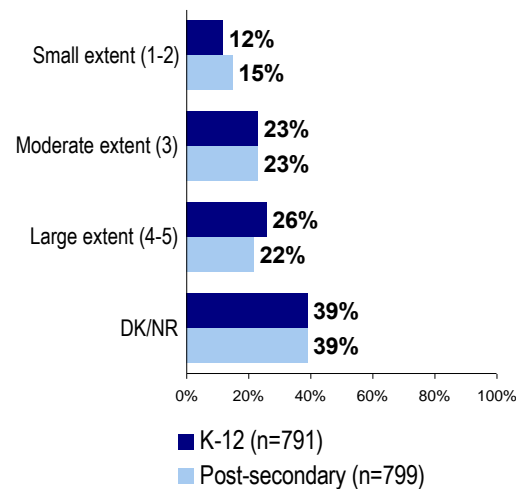
Most K-12 interview respondents felt that consideration should be given to books from Canadian authors. A few said that primary and secondary students should have exposure to Canadian material as it fosters a Canadian identity. A few interview respondents espoused the view that there is not enough Canadian content in K-12. For example, in high school English, students read American classics such as *The Great Gatsby* and *To Kill a Mockingbird*, at the expense of studying Canadian titles. One interview respondent argued that one of the most important things the publishing industry could do in terms of influencing the next generation of readers would be to launch a sustained effort in developing more Canadian book content in the curriculum for high school English.

a)   Public Awareness

In the survey of the Canadian public one-quarter of Canadians indicated that they feel that K-12 students (26 per cent) or PSE students (22 per cent) are exposed to books written by Canadian authors to a large extent. Twenty-three per cent feel that students are exposed to Canadian books to a moderate extent. Just over one in ten believe that K-12 students (12 per cent) or PSE students (15 per cent) are exposed to Canadian books to a small extent. Four in ten (39 per cent) are unsure or could not answer the question.

Awareness of Canadian Books in Education

"As far as you know, to what extent are Canadian K-12/post-secondary students exposed to books written by Canadian authors in the classroom?"

	K-12	Post-secondary
Small extent (1-2)	12%	15%
Moderate extent (3)	23%	23%
Large extent (4-5)	26%	22%
DK/NR	39%	39%

K-12 (n=791)
Post-secondary (n=799)

EKOS Research Associates Inc.   Each item was asked of half of the sample   Book Strategy, Wave 2, 2014

> Parents (those with children under 25 living at home) are more likely than others to say that K-12 students are exposed to Canadian authors to a great extent.

> Younger Canadians (age 35 and younger) are more apt than older Canadians to believe students (both K-12 and PSE) are exposed to Canadian authors to a great extent.

> Those who read for work or school are more likely than those who read for pleasure to believe students are exposed to Canadian authors to a great extent.
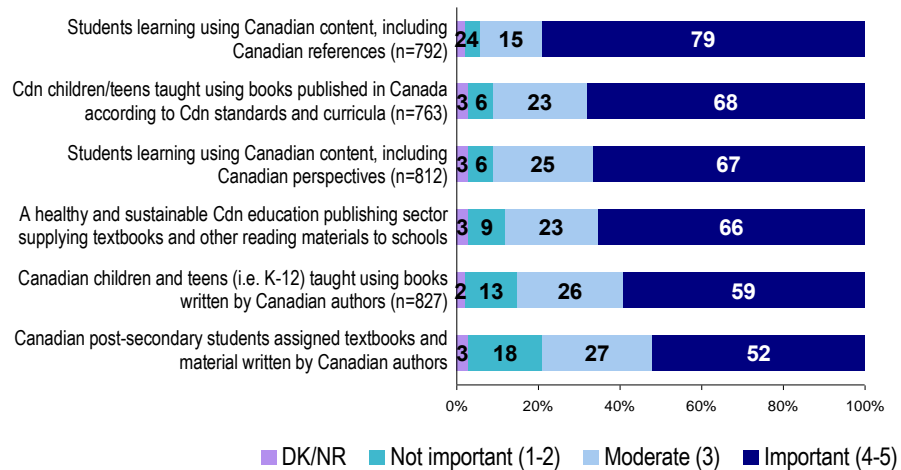
b) Public Perceptions – Use of Canadian Books in Education

The survey of Canadians also included a series of questions about the importance of various factors in terms of teaching Canadian students. Most Canadians (79 per cent) feel it is important that students learn using Canadian content, including Canadian references (such as geography, spelling, and units of measure). Over one-third (68 per cent) feel it is important for Canadian K-12 students to be taught using books published in Canada and according to Canadian standards and curricula. A similar proportion (67 per cent) believe that it is important for students to learn with Canadian content including Canadian perspectives (such as values and stories), or that it is important to have a healthy and sustainable Canadian education publishing sector supplying textbooks and other reading materials to schools (66 per cent). Note that students learning from Canadian references is seen as more critical than learning from Canadian perspectives.

Over half of Canadians feel that it is important that K-12 students are taught with books written by Canadian authors (59 per cent) or that Canadian PSE students are assigned textbooks and material written by Canadian authors (52 per cent), although the case for K-12 seems marginally more compelling.

Perceptions – Use of Canadian Books in Education

"How important are each of the following in terms of teaching Canadian students?"

	DK/NR	Not important (1-2)	Moderate (3)	Important (4-5)
Students learning using Canadian content, including Canadian references (n=792)		2	4	15	79
Cdn children/teens taught using books published in Canada according to Cdn standards and curricula (n=763)	3	6	23	68
Students learning using Canadian content, including Canadian perspectives (n=812)	3	6	25	67
A healthy and sustainable Cdn education publishing sector supplying textbooks and other reading materials to schools	3	9	23	66
Canadian children and teens (i.e. K-12) taught using books written by Canadian authors (n=827)	2	13	26	59
Canadian post-secondary students assigned textbooks and material written by Canadian authors	3	18	27	52

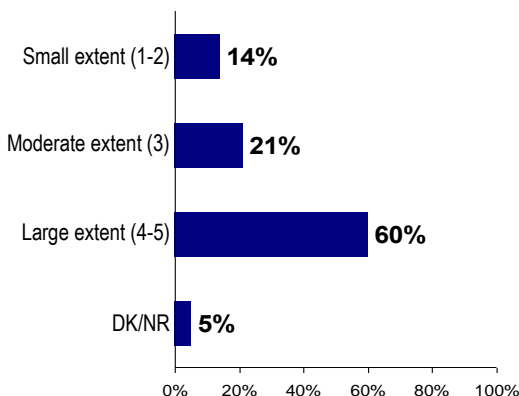EKOS Research Associates Inc.

n=1590

Book Strategy, Wave 2, 2014

- Women have a higher propensity than men to rate each factor as important.

- Those with the highest household income ($120,000 and over) rated the importance of each factor lower than those with less income.

- Older Canadians (over age 55), along with those without children at home, are less likely to feel that it is important for PSE students to be assigned textbooks and material by Canadian authors.

- Book readers are more likely than non-book readers to see the importance of K-12 students being taught with books published in Canada according to Canadian standards and curricula, and that it is important to have a healthy and sustainable Canadian education publishing sector.

c) Perceived Need for Public Campaign in Education Sector

According to the survey of Canadians, a majority (60 per cent) of the public feel that there is a need for an education campaign that emphasizes the importance of Canadian students learning through books written with Canadian contexts and references to such things as Canadian political systems, units of measurement, and geographical references. One in five indicated that this type of campaign is needed to only a moderate extent and fourteen per cent feel it is not needed.

Need for Public Campaign in Education Sector

"To what extent is there a need for a public education campaign that emphasizes the importance of Canadian students learning through books written with Canadian contexts and references (e.g., political system, units of measurement, geography)?"

Category	Percentage
Small extent (1-2)	14%
Moderate extent (3)	21%
Large extent (4-5)	60%
DK/NR	5%

EKOS Research Associates Inc.

n=1590 Book Strategy, Wave 2, 2014

- Women are more apt than men to feel there is a need for a campaign.

- Older Canadians (age 55 and over), along with those without children in their household, are more likely to believe there is a need for a public education campaign.

- Those with lower income ($40,000 or less) are more likely than those with higher income to feel there is a need for a campaign.

- Residents in Quebec or Atlantic Canada are more apt than other Canadians to believe there is a need for a campaign; those in Alberta are least likely.

- Canadians who read books, along with those who read more per week, and those who do not use an e-book reader, are more likely to believe there is a need for the described campaign.

d) Effective Messaging in Education Sector

Six images or messaging approaches were described in the survey of Canadians, as examples of how a public education campaign might highlight the value of Canadian students being taught from a Canadian context. Most (73 per cent) believe that showing Canadian students learning about a Canadian legal system rather than a system from another country would be effective messaging. A majority (60 per cent) also believe that showing a new partnership of collaboration between Canadian governments, Canadian educational publishers, educational institutions, teachers, parents and students supporting the use of Canadian books in the classroom would be effective.
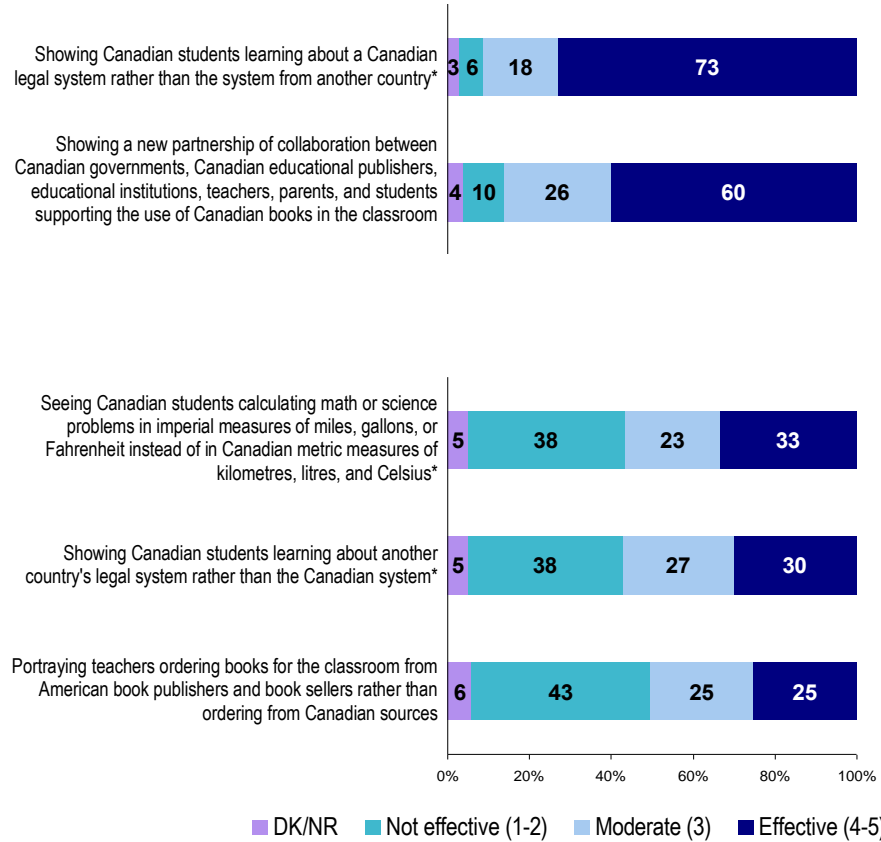
Nearly half (49 per cent) rated scenarios showing Canadian students learning to spell Mississippi but not Saskatchewan, or learning the names of American presidents, but not Canadian Prime Ministers as effective. One-third (33 per cent) believe that seeing Canadian students calculating math or science problems in imperial measures of miles, gallons, or Fahrenheit instead of in Canadian metric measures of kilometres, litres, and Celsius would be an effective approach.

Results highlight the effectiveness of communicating messages from a positive rather than a negative frame of reference. While nearly three-quarters of respondents saw the positive image of Canadian students learning about a Canadian system as effective, a much smaller proportion (30 per cent) saw the approach as effective when it was reversed (i.e., showing Canadian students learning through another country's legal system rather than a Canadian system). By extension, it is likely that the example of the collaborative partnership was seen as effective, in part because it describes a positive approach.

Similarly, only one-quarter (25 per cent) believe that an image of portraying teachers ordering books for the classroom from American book publishers and book sellers, rather than ordering from Canadian sources, would be effective messaging to highlight the value of Canadian students being taught form a Canadian context. Given the results from the other paired items, it is very likely that results for this approach would be much stronger if the example showed teachers ordering from Canadian rather than American publishers.

Effective Messaging in Education Sector

"How effective would each of the following be in highlighting the value of Canadian students being taught from a Canadian context?"

Showing Canadian students learning about a Canadian legal system rather than the system from another country*
3 6 18 73

Showing a new partnership of collaboration between Canadian governments, Canadian educational publishers, educational institutions, teachers, parents, and students supporting the use of Canadian books in the classroom
4 10 26 60

Seeing Canadian students calculating math or science problems in imperial measures of miles, gallons, or Fahrenheit instead of in Canadian metric measures of kilometres, litres, and Celsius*
5 38 23 33

Showing Canadian students learning about another country's legal system rather than the Canadian system*
5 38 27 30

Portraying teachers ordering books for the classroom from American book publishers and book sellers rather than ordering from Canadian sources
6 43 25 25

0% 20% 40% 60% 80% 100%

■ DK/NR ■ Not effective (1-2) ■ Moderate (3) ■ Effective (4-5)

* Half sample

(Those seeing a need for campaign)

> Compared with men, women are more apt to feel that images of a partnership of collaboration between stakeholders would be effective. Women were less apt to feel that showing teachers ordering books from American sources would be effective.

> Book readers, along with those who spend more hours reading books, were more apt to feel the following messages would be effective:

◇ Canadian students learning to spell Mississippi and American president names;

◇ Canadians students learning imperial rather than metric; and,

◇ Canadian students learning about another country's legal system rather than Canada's.

❯ Those who read for school were more apt than other readers to feel that any of the messages would be effective.

Half of the respondents to the survey of Canadians offered open-ended responses on what they felt would be effective in highlighting the value of students being taught from a Canadian context. These typically fell within four broad categories. The categories, along with examples of the responses, are presented in the following table.

What would be effective in highlighting the value of Canadian students being taught from a Canadian context?	
Promote linkage to the development of the knowledge base of Canadians, learning about Canada, understanding gained, being able to apply that knowledge for positive impacts in our country/world (awareness about Canadian culture/history/values)	If Canadian students were exposed to their own history in the classroom, through texts outlining the same, I suspect that the interest would continue long after leaving school. Becoming informed Canadian citizens, able to hold their governments responsible for the economic, cultural and physical health of Canada. The idea that the reader can grow up to be a viable author and continue the cycle of learning and teaching. The most effective way of highlighting the value of Canadian students being taught from a Canadian context would be the improvement in the quality of education that would result. Would help with our economical system. We should always try and buy locally.
Emphasize the importance of decreasing the over-exposure of US encroachment on our culture, told from our own perspective, rather than another country	To show that the Canadian perspective is different than American or European. About Canadians, for Canadians, by Canadians. It gives you a better perspective on it from the community vs. people looking at it from outside the community. Students already are exposed to the American systems by the media so they need to know how the Canadian system works. The threat to Canadian culture is largely the United States. I think there are distinct differences in the way we think and those differences should be highlighted. Moderate the effect of US TV, books, movies etc. diluting Canadian characteristics.

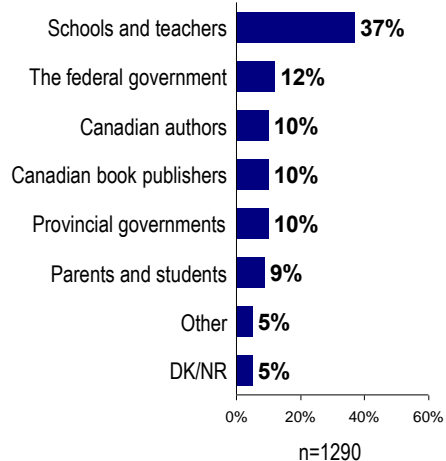| Emphasize the impact of strengthening Canadian values/identity/culture/pride/patriotism, showcasing diversity and social values	Instil a sense of national identity & pride in students.
	Demonstrating the importance of Canadian literature for establishing the Canadian identity.
	Stories from students themselves about what it means to them, as well as from famous Canadians like Chris Hadfield.
	Emphasis on a united, proud Canada.
	Pride in country, making new immigrants feeling part of the country.
Emphasize the enhanced school curriculum that ensures Canadian content is being taught (using Canadian textbooks, initiatives to bring more Canadian sources/values/perspective to the education system)	Making a Canadian curriculum mandatory in our schools.
	That all students be well versed in Canadian content.
	The pricing of textbooks from Canadian authors/publishers to make them preferable to other sourced materials.
	More about Canadian context taught to teachers in their university education, workshops, conferences, etc.
	Awareness campaign aimed at parents, showing what is currently taught from a Canadian context and what should also be taught from a Canadian context.

e) Targeting an Education Sector Campaign

According to the survey of the general public, just under four in ten Canadians (37 per cent) feel that schools and teachers are the best sources to communicate messages to the public about ensuring the health of the Canadian educational book industry. Roughly one in ten indicated that the best sources would be the federal government (12 per cent), Canadian authors (10 per cent), Canadian book publishers (10 per cent), provincial governments (10 per cent) or parents and students (9 per cent).

Canadians primarily believe that the messages should be aimed at schools (35 per cent) or parents (34 per cent). About one-quarter see teens (24 per cent) or young adults (23 per cent) as the best target for these messages. Fewer than one in five believe that the messages should be directed to children (18 per cent), politicians (17 per cent) or the federal government (14 per cent).
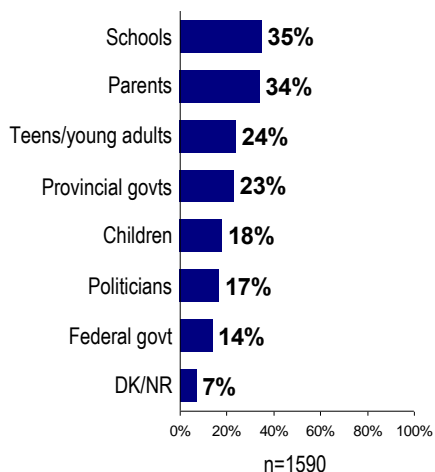
Targeting an Education Sector Campaign

"Who would be the best to communicate messages to the public about ensuring the health of the Canadian industry of books to be used in classrooms?"

Category	Percent
Schools and teachers	37%
The federal government	12%
Canadian authors	10%
Canadian book publishers	10%
Provincial governments	10%
Parents and students	9%
Other	5%
DK/NR	5%

n=1290
(Those seeing a need for a campaign)

EKOS Research Associates Inc.

"Who should these messages be primarily directed to?"

| Category	Percent
Schools	35%
Parents	34%
Teens/young adults	24%
Provincial govts	23%
Children	18%
Politicians	17%
Federal govt	14%
DK/NR	7%

n=1590

Book Strategy, Wave 2, 2014

❯ Men are more likely than women to feel that Canadian authors or Canadian book publishers are best to communicate messages.

❯ Parents are more likely than other Canadians to view the provincial government as the best voice to communicate the message. Those in Atlantic Canada are also more apt to feel the best conduit would be the provincial government.

❯ Those who do not typically read books are more apt to say the federal government would be the best voice from which to communicate these messages.

f) Value of Canadian Books in Education Sector

Examining the value of Canadian books in the education system, general public survey respondents were asked to rate their level of agreement with four statements. Most Canadians (81 per cent) agree that teaching kids in classrooms from a Canadian context is important in fostering appreciation and a shared sense of Canadian identity and culture. Seven in ten (71 per cent) agree that a sustainable Canadian publishing sector helps to ensure that students have access to Canadian content. Two in three agree that more effort should be put into giving Canadian students access to books written, designed, illustrated, and published by Canadians. Nearly half (47 per cent) agree that reduced school budgets force teachers to copy and share teaching resources, which significantly reduces the revenue for Canadian education publishers and authors, although one in five (21 per cent) disagree and just under one in four (23 per cent) are in the middle.

Value of Canadian Books in Education Sector

"To what extent do you agree or disagree with the following statements?"
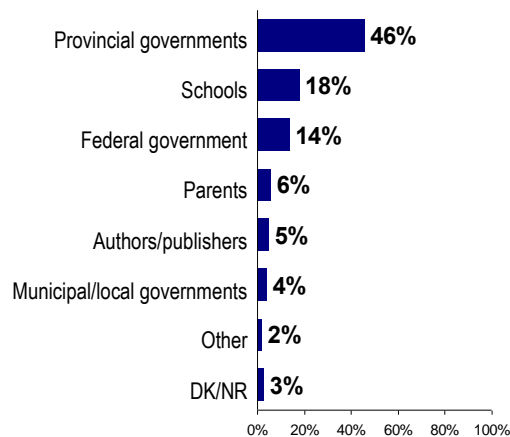

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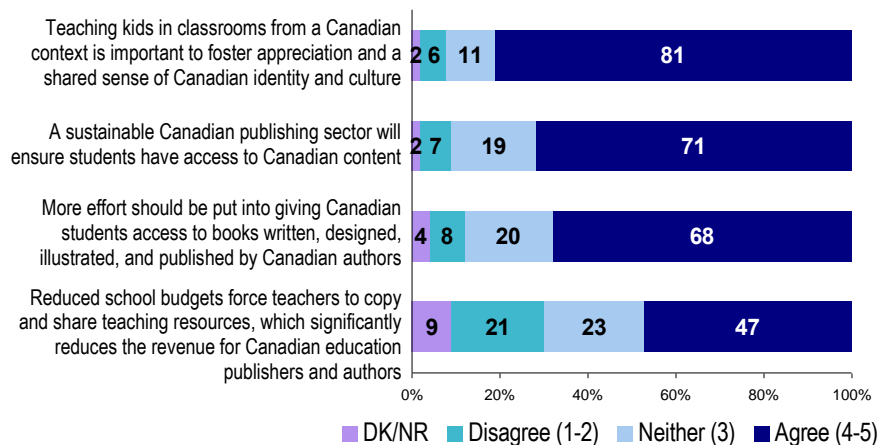
> Women are more apt than men to agree with all statements. Likewise, older individuals (age 55 and over), and those without children at home are more apt to agree than other Canadians.

> Residents of British Columbia, Quebec, and Atlantic Canada are more likely than other Canadians to believe that reduced school budgets force teachers to copy resources, reducing revenue for publishers and authors. Residents of Ontario are more apt to disagree.

g) Responsibility for Student Access to Canadian Books

According to the survey of the general public, nearly half (46 per cent) of Canadians feel that provincial governments should have the greatest responsibility for ensuring students have access to books written by Canadians, from a Canadian perspective and context. One in five (18 per cent) believe that schools generally should have this responsibility. Fourteen per cent believe the responsibility should rest with the federal government. Other stakeholders that Canadians feel should be involved include parents (six per cent), authors and publishers (five per cent), and municipal governments (four per cent).

Responsibility for Student Access to Canadian Books

"Who do you think should have the greatest responsibility for ensuring students have access to books written by Canadians, from a Canadian perspective and context?"

Category	Percentage
Provincial governments	46%
Schools	18%
Federal government	14%
Parents	6%
Authors/publishers	5%
Municipal/local governments	4%
Other	2%
DK/NR	3%

EKOS Research Associates Inc.

n=1518

Book Strategy, Wave 2, 2014

- Lower income Canadians (with less than $40,000) are more apt than those with higher household incomes to feel that the federal government should be responsible. Likewise, residents of Atlantic Canada are more likely than those in other regions to believe that the federal government should be responsible.

- Canadians who read books, and those who spend more on books, are more apt to see the responsibility as mostly resting with provincial governments.

3.3   VALUE OF TEXTBOOKS

PSE students expressed the perception that the price of academic books has been based on the industry having a captive audience and very little competition. Some felt that "books have a high price because [publishers] know people have to buy them". The price of academic books overall was described as unfair, "overpriced", "ridiculous", and "expensive". Further, most students said they do not feel the price of new editions of books is justified; subsequent editions should not be as expensive as the original books particularly because the differences in additions feels trivial (e.g., new page numbering or formatting).

A few PSE students noted the large variance of prices in books - some are $400, some are $40. While students indicated that the price difference may be attributed to the quality of the text or that the book may be self-published, the price is primarily associated with the course. For example, introductory level textbooks, language and business books were noted to be expensive; novels and monographs are generally less expensive. Books in the sciences are "extravagantly expensive, and there are always new editions" some noted. No one related the variation in price to the origin or size of publishers.

Most students agreed that the price of a book can be justified if it is valuable to the course or has helped to get a good grade in the course. Most students felt that if they were excited about a course, they did not mind the price of the texts as much. One post graduate said she sees more value now in the books she had to buy in undergrad**.** Some feel the price might be fair if correlated to the effort that goes into the book. A few mentioned they are much less satisfied with the price of the book, however, if a professor is critical of sections of book or they find errors in the textbook (one student observed that "the more authors involved in the textbook, the better written it is").

A few focus group participants said students should appreciate that when buying textbooks and educational material, they are paying for someone's knowledge, and that the price they pay for the book goes into sustaining future knowledge. A few students, notably in the Calgary focus group, said that research money and student tuition contributes to textbook authors' salaries, which in turn supports the creation of the textbooks they use; therefore, in a sense, they have paid twice for a textbook they purchase. A few pointed out that for books based on original research, the full cost of creating the written material is not covered by research funding and student tuition.

In terms of format, a few students expressed interest in:

> audio versions of textbooks, so students can "read" while walking, exercising, commuting;

> the ability to purchase chapters of books rather than the whole volume; and,

> software as an add-on to textbook content which can for instance, generate quizzes for studying.

3.4 LIBRARY USE

Most PSE students in the focus groups have used libraries for sourcing materials for research and essays, but use libraries less for accessing required reading for their courses. Some PSE students will check libraries for textbooks to save the cost of purchasing books and a few have been successful for some courses, with a few others indicating that only "the keeners" get in early enough to access the library copies. A few said they wish that libraries would rent current textbooks in shorter durations, such as two hours, so that more people have the opportunity to access the books.

3.5 FAIR DEALING

a) Awareness

There was limited understanding of the term *fair dealing* among PSE students, although some had heard of the term or were vaguely aware of the concept. Among those who were familiar with the term there were mixed opinions about what it meant or whether it is reasonable. A few held the view that fair dealing provisions are too restrictive for students; a few mentioned that the limits are there for a good reason. But many are not clear about fair dealing and copyright, and are only vaguely aware of messages about copyright that are posted around photocopiers on campus and brief statements in the front pages of books.

Many interviewees indicated awareness of fair dealing, although a few did not recognize the term. Of those aware, some indicated that there is "misinterpretation" of the legislation; however, many indicated that there is more specifically "disagreement" over the term. A few stated that "Supreme Court decisions have provided a high degree of clarity" and that "since fair dealing is under a law, the interpretation is either with clarity under the law or up to the government." A few indicated that the legislation was made "specifically vague" and that interpretations of fair dealing should be broader than copyright metrics that may involve, for example, copying 10 per cent of a book or one chapter (i.e., driven by a spirit of fair payment that is not easily defined merely by a set number of pages).

A few said that universities have a role to inform, train and advise their faculty about fair dealing. Library representatives indicated that training has taken place in their institutions with teacher librarians and administrators or that copies of copyright guidelines are posted. Some said that while there is a portion of the population who will still disregard copyright law, there are others who are sensitive to the rules and are extremely cautious in what they copy.

b) Downloading Free Books

Some PSE students said they suspect or are aware that some sharing and copying happens for education, which would be considered illegal. But, most said they do not understand exactly which types of activities are illegal, or whether it matters if a single individual is doing it for their own personal education versus a whole group of people. Copying and sharing print and e-books is seen by many students as ethically and morally a "grey area" where there are many sides to be considered when determining what is

right. Students provided numerous examples of book copying and sharing that they feel might be in an ethical/moral/legal "grey area", such as:

› Instructors telling students about where they can access a text or portion for free online, posting a portion of a text online "for a limited time" before removing it, or making a text or portion available through the secure online learning system, accessible only with a login;

› Instructors assembling relevant chapters/book portions into a coursepack;

› Instructors setting aside a book in a resource centre/library for students to make copies of the relevant chapter;

› Downloading for free a book in order to see if they want to purchase it;

› Downloading, without paying for, a book that is optional and which they would not have otherwise purchased; and,

› Ordering a book from Asia (Thailand was mentioned) that is an inexpensive copy of the required text.

Ultimately, PSE students expressed the following sentiments:

› If their professor endorses the sharing/access, then it is okay. "Teachers are just trying to help out students. It's not entirely morally right, but it's not that they're trying to rip off authors, it's that they understand it's expensive to access books."

› It is okay for students to access materials for free, because they have little income and are only "poor students" for so long;

› Sharing knowledge should be free, and there should be no restrictions on books and information used for education;

› It is not right to require students to pay for an entire book when only part of it is needed;

› No one should have to pay twice for the same book (if they've already bought a print copy, they do not need to pay for the e-copy);

› Somebody already paid for the book once (and in turn made it available for free to others);

› Sharing a digital copy should not be more wrong than sharing a print copy. If it is okay to temporarily borrow a print book, why not for downloading a book and using it temporarily?:

› Publishers are "taking advantage of students" and driving them to access books for free because of the overly high prices they charge. "You'll do what you have to [to get your books] if you're passionate about your education." Some said this leads to a "vicious cycle" of consumers finding ways not to pay, resulting in higher prices, applying greater pressure and

incentive for consumers to find ways around the prices. One participant described this as "an unsustainable model" that is doomed to escalate to an untenable pricing model; and,

› Some books are not worth the price charged (e.g., students will use the book only a few times, the information will be quickly outdated, errors in the book indicate poor quality).

c) Willingness to Pay for Books

PSE students outlined that they understand that accessing books for free when they are meant to be paid for has an impact on the people who produced the book, and ultimately leads to higher prices for books. Many expressed little sympathy, however, for the impact this has on book publishers. They see book publishers as profit-driven and unconcerned with publishing quality books at prices that students would find reasonable to pay for. In response to the plight publishers are facing, one student said, "They will find a new method to make sure they get their money."

d) Copying Material

Many interview respondents from educational institutions said teachers make photocopies of a book, or portions of a book, available to students or for use in teaching (such as for handouts or for coursepacks). A few said that the prohibitive cost of purchasing material results in the photocopying of available material. In spite of this, a few observed that there is less photocopying in the past decade given the emergence of internet material and technology such as Smartboards in classrooms. Many interview respondents indicated that copyright guidelines are posted near photocopiers at institutions. Some stated that is it only appropriate to copy any portion of a book when the material is already owned by the institution or when it does not replace the purchase of a book.

e) Copying Online Material

Many interview respondents said that their institution retains licenses for students to access digital material. A few interview respondents, mainly from K-12 institutions, reported they do not hold any licenses for their students to have digital access. Some interview respondents noted the availability of open educational resources available online, indicating that these are "free and open" to copy and distribute material. A few pointed out that online material that is "off copyright", such as classic literature, is acceptable to copy and distribute. A few interview respondents explained that providing links to online material is appropriate and they do not consider this to be making a copy of material.

f)   Implications of Unauthorized Access

When asked about the implications of copying books for free, most respondents distinguished between authorized and unauthorized copying of books. One respondent said that in the case of unauthorized access, the "implications are clearly that the creator of the work and the publisher is not getting fairly remunerated". Many interview respondents indicated that it is acceptable to make educational material available to students for free when the institution has established a license to access the material.

g)   Arguments for Accessing Books without Authorization

Most respondents agreed that authors and publishers should be considered when making decisions about accessing books, and consideration for authors' and publishers' roles in producing books should prompt individuals to access only authorized or paid copies. Some respondents said, however, that people are unsympathetic to authors and publishers for a number of reasons, and so will not care whether written material has been obtained illegally. Reasons can include the general expense of purchasing books; the perception that publishers are large, faceless, corporations; and that scholarly authors already receive payment from universities.

h)   Digital Licensing Arrangements

Many interview respondents explained that digital licensing arrangements can increase access for students while ensuring reasonable benefit for publishers. Some institutions had the perception that these arrangements are economically viable for publishers as well as having advantages for students and institutions: publishers know how much they are selling, the arrangements are easy for libraries to use, and students have greater access to material. Some interview respondents said that some digital licensing arrangements are not useful, including those that limit linking (e.g., Harvard Business Review) or DRM arrangements that "lock down" the content allowing only a small portion to be downloaded. A few interview respondents noted concern with the cost of digital licensing arrangements, given that the library institution budgets have been decreasing, saying that the cost can motivate individuals to seek unauthorized access to material. One indicated that digital licencing arrangements restrict access for those not associated with educational intuitions (most Canadians not affiliated with an educational institution would not access material at cost).

3.6 UNDERSTANDING OF BOOK PUBLISHING

a) Role of Publishers

Overall, PSE students reported that they do not know much about the role of publishers although they feel that publishers in the educational sector have a somewhat different function than other publishers. Students see publishers of academic books as responsible for "bringing it all together": choosing books to publish, commissioning authors to write a book, compiling sections and making choices about the flow and approach of the book, providing advances to authors, editing, and handling book design and layout. Students believe publishers are responsible for "getting the book out there" or marketing it (although some pointed out that marketing textbooks is different from marketing mainstream books because there is already a market for textbooks). Another difference between academic publishers and mass market publishers that many students noted was that the former probably have to concentrate more on finding authors, while mass-market publishers receive manuscripts from potential authors. Some felt that publishers have a role in critically vetting content for accuracy. A few observed that education publishers are "generalists" who rely on authors to bring the subject matter expertise; publishers "are not experts at anything but book publishing."

Students in Winnipeg observed that they are more readily able to identify the names of academic publishers than the names of well-known textbook authors, while the reverse is true when they think of mass-market books. The names of academic publishers are familiar to them, providing publishers with an opportunity to build a reputation that is recognized by students.

b) Self-Publishing versus Traditional Publishing

Some PSE students were aware of self-published books being assigned for some courses. Although they expressed the concern that self-published books may be less durable, almost no one expressed concerns with other aspects of self-published books, such as the quality of writing, the quality and accuracy of the content, or the usability and relevance to their studies. Some students spoke in defence of the value of self-published textbooks, saying that they like that the author benefits directly from the sale of the book, and feel that professors who assign self-published textbooks are demonstrating empathy for students in terms of the cost of education and books. Only a few expressed negative perceptions of self-publishing (e.g., that it can be seen as a "cash grab" for the professor/author).

Most respondents reported that self-published books are used to only a limited degree. In the K-12 setting, self-published material is purchased to support learning of regional interests (such as Maritime, Prairie, or Aboriginal culture). While accessing regional knowledge is cited as an advantage of self-published work, many interview respondents said that the quality of writing and editing, along with the physical quality (i.e., the sturdiness of the book) are considerations when purchasing self-published books.

Interview respondents from PSE institutions reported that self-published books are used infrequently primarily due to the perception that publishers enhance the quality of published material. A few said that professors may self-publish books. Library representatives noted that they tend to trust the quality of material produced by a publisher, and that self-published books require more time to review and evaluate the credibility of the book prior to purchase.

c) Perceptions of Profit Share from Book Sales

PSE students said they are not entirely sure how many individuals share in the sales of a book, but they suspect there are many people involved and that publishers take the largest proportion. Along with their lack of knowledge about what publishers do, comes confusion as to whether the proportion of a book sale that a publisher takes is justified by the publisher's effort, suspecting that "publishers inflate the price of the book."

Overall, students have strong sympathy for authors, whom they perceive as not earning much from book sales and who get "whatever's left" from a book sale after the publisher and retailers take their cut. In addition, some say that authors are under pressure to produce books but that the returns do not make up for this pressure, and that authors are left out of profits from sales of future editions.

3.7 PROPOSED BUSINESS MODELS

Many PSE students expressed openness to finding a business solution that would be acceptable to everyone. Many feel that there is pressure for publishers to adapt to a new business model that takes into consideration new technology, students' limited income, and students' preferences. There was some discussion that an adapted business model would mean that publishers would have to accept lower profit margins, which these students did not find concerning: "It's not like I'm going to feel bad for them [publishers] all of a sudden."

Interview respondents offered a number of suggestions to change the way that books are created, published and paid for. They said that the book sector requires alternative business models that increase the benefit for authors and publishers along with consumers. A few said that it is time for a "broad, national conversation" about the Canadian book sector that looks at the principles of adequate compensation for every component of the ecosystem.

Common suggestions offered by both PSE students and interview respondents include:

> **Making chapters or portions of books available** for a fee. Both groups noted that some students have already encountered the breaking up of educational textbooks, with instructors assembling course packages of materials. Being able to purchase a digital chapter of a book at a marked discount from the cost of the whole book was said to have the potential to motivate many to make the purchase rather than to copy the relevant material. Several observed, "Publishers can take a lesson from the music industry. You don't have to buy a whole CD. You can go to iTunes and buy [individual] songs." Unbundling textbooks allows teachers and professors to piece together material for their specific classes. One interview respondent said that "audiences are moving away from use of printed material towards a wide-ranging use of a variety of media". Some students, however, noted some disadvantages to unbundling, largely that the material is not easy to resell afterward like a book.

> **Ensure a reasonable cost of textbooks**. The prohibitive cost of textbooks, particularly in first and second years in PSE, is viewed as a budgetary challenge for most students, with "fairness" a central tenant of complaints. Likewise, a few noted that students expect that a higher price for a book should equal higher quality. One student suggested publishers need to make books "more attractive to buy, so you don't want to find a way to access the inferior product for free." They have issues with the books they buy as not being durable, containing errors or contradictory information, or having a new edition issued soon after their purchase. The cost is noted by some as a motivator for students to find unauthorized means of obtaining the material (i.e., obtaining a pirated print or digital copy). If the price was perceived to be fair, there would be less unauthorized activity and more compassion for the publishing sector. A few have indicated that specialized courses and higher levels are where more expensive textbooks and material are expected.

The following ideas were suggested by PSE students in the focus group discussions as ways that book publishing could be changed to accommodate their needs:

> **A rental or subscription model,** where the book (physical or digital) is returned at the end of the course, or where students have access to a variety of textbooks for a limited time (e.g., a Netflix for textbooks), was discussed as an appealing option. Although these suggestions emerged in a few groups, many said students prefer to own the book so there is no time limit on availability. An attractive entry price point may be able to counter this preference for not having a time limit.

> **Pack books with supplementary content** to make it more desirable to buy the books ("stuff that you can't get through pirating") like CDs, interactive study materials, access codes to download online materials or the digital version of the book. Students in a few groups mentioned this would add extra value to their book purchase and might motivate some to buy new. Some expressed worry that this could become expensive if students are forced to buy the online/interactive portion.

> **E-books as living documents** that undergo automatic updates to ensure the information remains relevant and accurate. Some students like the idea of purchasing a book and having a guarantee of receiving online updates/new editions, which would be important to students who

intend to keep expensive reference books in disciplines like engineering, science and medicine. Students also suggested that e-books could offer the ability to collaborate with others and share notes, and receive alerts when corrections are posted or errors are found. Many said, however, that they would not be open to paying a higher price in order to access live updates: they feel this would be a "gimmicky" offer and not valuable in cases where they would have no need for an updated version once they have finished with the course.

> **Relax restrictions on e-books** so that pages can be printed (as many students find they learn better from paper copies, but may be required to buy a book available only in e-book form) and so that e-books can be easily accessed on all the devices they use. The easier the book is to access, the more likely they are to make the purchase, some said.

Models or improvements recommended by a few interview respondents in the education sector include:

> **Provide updates to K-12 digital textbooks**. In K-12, schools generally own the textbooks for use by students each year. A few interview respondents from K-12 institutions noted that an advantage of digital textbooks would be owning a license that would allow the institution to access updates of the text. The digital textbook, in turn, would be available as the newest edition for students in subsequent years, without the wear and tear experienced with a traditional textbook.

> **Promote a diverse publishing industry**. Education stakeholders desire a healthy publishing industry that allows them choice; according to one interview respondent, "the production of good material is to have a wide array of publishing houses." A healthy publishing industry includes healthy competition. Smaller publishing houses allow varied work to be published at reasonable costs that may not be supported through larger publishers. One interview respondent noted "with Amazon undercutting prices, this will drive out more publishers, and then they will have a monopoly and can then raise prices."

> **Offer better metadata on publications** to help K-12 institutions, PSE institutions, and related libraries discover new content. As explained by one librarian, "people want us to purchase content that is easy to find and use; they don't come ask us for the material that is so locked down that they can't learn anything about it." Another library representative indicated that their institution orders 80 per cent of their material from Amazon because of the flexibility and user-friendliness of their purchasing system: the ability to search and review the books; the shipping is free; payment is efficient; and the material can be returned. A related model that is in use and supported by one key informant is patron driven acquisition whereby the library purchases the book after a certain number of uses by patrons.

> **Allow for advertising in textbooks**. One key informant endorsed the opportunity to allow firms to advertise in textbooks in order to reduce the purchase price for students. For example, an engineering textbook could have engineering firms pay to produce a column within the textbook, perhaps stating the employment opportunities they may have or ways their firm have

contributed to the sector. (This was also described as acceptable among PSE students in one focus group.)

In the context of considering alternative business models, it may be useful to note that in the survey of the general public, e-readers were asked about a possible e-books service, described as a digital delivery service to access e-books, using a model similar to Rogers on Demand or Netflix. This type of subscription-based model is seen as highly useful specifically as it is applied to the education sector. A full two in three (65 per cent) respondents see this as a useful model for K-12 schools, and more than three in four (77 per cent) said this model would be useful for post-secondary students. It should be recognized, however, that this perspective is captured from the broader Canadian public.

Demand for E-Book Services for Education Sector

"If a digital warehouse for e-books was available for educational text books and material used in elementary and high school/college and university, how useful do you think this would be for public schools to subscribe to this service?"

	Elementary/high school	College/university
Not useful (1-2)	6%	3%
Moderate (3)	19%	12%
Useful (4-5)	65%	77%
DK/NR	10%	7%
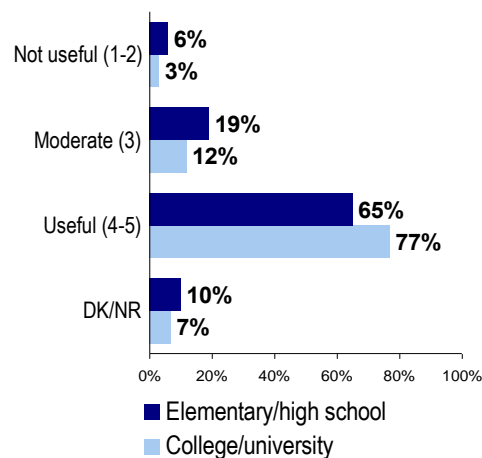
EKOS Research Associates Inc.

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Book Strategy, Wave 2, 2014

> The most affluent readers (reporting household incomes of $120,000 or greater) as well as those who read for school and/or work are even more likely than others to see the value in this type of service in the education sector, as are e-readers, and those who spend the most for books.

3.8 COMMUNICATION STRATEGIES

Mixed feelings were reported by PSE students participating in the focus groups about whether a public education campaign would have sufficient impact to result in real change in the behaviour of students. As stated by one student, "There will always be pirating, because some people think if I can get it for free, why not?"; this is a view shared by some who cannot envision the book industry changing significantly to accommodate the needs of students. On the other hand, many other students expressed

openness to hearing more about copyright issues and suggested that some messages and strategies might work. The following suggestions were framed in the discussion:

> **Educate students about copyright**, particularly about what is acceptable under fair dealing and how this differs for e-books and print books, and for other kinds of copyrighted materials that students use. Participants said that they do not feel they hear enough about copyright at school, yet they think it deserves as much attention as the issue of plagiarism receives. They indicated openness to hearing information from instructors and librarians and other resources at their schools. They also suggested these messages should make connections between personal and academic use of books.

> **Educate people generally on where money from book purchases goes**. Let people know how much goes to researchers/authors they read and enjoy. According to some students, personal stories and pleas from authors can help make copyright issues "real" to students and use arguments that speak to doing what is ethically right (e.g., paying for a book so authors receive their income).

> **Reach students and readers when they are young** in order to "break the cycle" and create a culture of respecting copyright. One student observed that students grow up receiving mixed messages about copyright when they observe cash-strapped teachers providing copies of texts in class. Therefore, it is important to reach students through schools and reinforce the messaging, this participant emphasized, coupling it with messages about acceptable access of other media (e.g., music, movies).

> **De-mystify the role of publishers and who they are, and then work to improve their image.** In several of the focus groups, students emphasized that more transparency is needed about what publishers do, how their role is reflected in the price of a book, and how publishers are working with others in the book industry. From the discussion it was apparent that students are sceptical that publishers are on their side. Some feel there could be less antagonism if publishers were transparent about their own role and profits, and made sincere efforts to help others in the industry (authors, students) who they feel are taken advantage of. A few students suggested publishers could improve their reputation by pledging to increase the profit share they provide to authors, and providing assistance to students and families who struggle to afford books.

> **Inform people about how their behaviour ultimately affects the consumer**, as some people are more influenced by the impact on themselves (i.e., rising costs of books) than impacts to authors or publishers. Some students also pointed out that schools contribute research to books, and so book purchasing reflects back on the institutions.

> **Provide clearer information in books about what copyright means** and what use is permitted to the purchaser (or borrower) of the book. Students would like information on how many pages in that particular book is legal to copy, and how the book should be referenced.

In some centres, PSE students in the focus groups drew comparisons between the book industry and the music and film industries while contemplating potential business models and communication strategies. Several differences were highlighted, however, which students feel make it difficult to effectively change behaviour and change the business model. Among the perceived differences discussed by students are that music and film have higher overhead costs than books and that books are unreasonably marked up; authors have fewer revenue streams for their product than do musical artists; and readers prefer physical copies of books most of the time, will only buy an e-book to save money compared to the physical one, and will "only torrent if they have to" (as opposed to music and movies, where digital is the new standard format).

Many interview respondents indicated that it is not the role of authors and publishers to communicate with the public on issues such as digital piracy. These respondents feel that authors and publishers have a vested interest in ensuring that components around fair dealing remain as restrictive as possible as it relates to educational purposes.

Some interview respondents, however, said that any communication by authors and publishers should involve increased transparency (such as "opening the books") or "humanizing" the sector to show that material they are downloading or copying is the intellectual property and effort of an individual. Some indicated that communication should target the broader public (including students), although a few suggested that students will have less sympathy towards authors and publishers. Others suggested communication should be directed to university staff (notably professors who are also authors). Students said that communication should highlight the value that publishers add, such as offering peer-reviewed and vetted information, in contrast to some material online without cost. A few suggested there is greater sympathy toward the author than the publisher in terms of compensation. A few more noted that without compensation for material, the quality and quantity of learning material may decrease in the future.

4. SUMMARY

CONSUMPTION PATTERNS

› Much of the academic work done by students remains heavily reliant on books in some form, with the amount of book reading dependent on the level of education and subject. In K-12, there is a strong focus on a consistent approach to the curriculum with teachers and library staff largely responsible for the selection of books. In PSE, the curriculum development is typically left to the course instructor.

› Most PSE students indicate that the overall cost of books for school is expensive, and most expensive for some students in their first year of studies. To mitigate costs, some PSE students buy used books, even if the text book is an older edition. Some students defer buying books until they understand how thoroughly the book will be used for the course.

› Interview respondents communicate that spending for books in the education sector has changed notably over time. Representatives of the publishing industry noted that revenue has decreased in the last two decades, most sharply in the last ten years. Those from K-12 institutions indicated that public spending on education has decreased, resulting in less funding available to purchase books. Some noted that the cost of PSE texts has increased, resulting in students purchasing fewer books but spending the same amount overall.

› PSE students in focus groups noted a strong preference for buying required books, rather than renting, sharing, or sourcing them for free, in order to ensure that they have convenient access to them when they need them. These PSE students described purchasing physical textbooks as an investment, for adding to their personal library for later reference.

CANADIAN BOOKS

› PSE students described the usage of Canadian authored or published books in their studies; however, the extent to which they encounter Canadian books depends greatly on the course or subject. PSE students are appreciative of Canadian textbooks, particularly for Canadian-specific content (such law or health care), where there is a need for relevant references and units of measure. For other fields, most students feel that as long as the textbook is applicable and relevant to their learning, it need not be Canadian.

- Survey results indicate that Canadians see an obvious case to be made for the use of Canadian educational tools in teaching at both the K-12 and post-secondary levels, although the advantage in K-12 is perhaps even more compelling and obvious for some.

- The argument for Canadian books in the education sector seems an immediately compelling one, translating to six in ten seeing a strong need for a campaign to ensure that the public is aware of the issue and its implications for the quality of education in Canada.

- Provincial governments are seen as the organizations most responsible for ensuring that students have access to Canadian educational books.

- In terms of messaging about the need for Canadian books, the most effective approaches would focus on using material that contains Canadian references, published in accordance with Canadian standards and curricula, and with Canadian perspectives. Supporting Canadian authors and sustaining a healthy industry are of secondary importance.

- Interestingly, this is also best framed in a positive rather than negative context (i.e., describing the value of using Canadian rather than the disadvantage in using other frames of references and sources). Positive collaborations to achieve the end goal are also seen as effective. Respondents also volunteered that messages that highlight the benefit to Canadians' from increased knowledge about Canada and ourselves as Canadians (i.e., identity, culture, history and values) are particularly powerful.

- Again, youth, parents and the school system are seen as the best target for messaging, and schools and teachers are seen as the best voice from which to communicate the message (i.e., teachers and schools).

DIGITAL BOOKS

- Most interview respondents agreed that a clear change in the five years has been the emergence of digital books and material for educational use. Likewise, library representatives from both K-12 and PSE noted that institutions are centrally purchasing digital books and licenses from a variety of publishers. PSE students note at least some assigned reading is digital, although most students say they prefer a physical book for educational use over digital.

VALUE OF TEXTBOOKS

- PSE students perceive that the price of academic books has been based on the industry having a captive audience and noted the large variance of prices in books (from $40 to $400).

- Most students agreed that the price of a book can be justified if it is valuable to the course or has helped to get a good grade in the course. Students also identified that if they were excited about a course, they were more tolerant of the cost of the text book.

LIBRARIES

> Most PSE students in the focus groups use libraries for sourcing materials for research and essays. Some will try to access libraries for textbooks to save the cost of purchasing books but reported that few copies are typically available.

FAIR DEALING

> There was limited understanding of the term *fair dealing* among PSE students, although some had heard of the term or were vaguely aware of the concept. A few held the view that fair dealing provisions are too restrictive for students; a few mentioned that the limits are there for a good reason.

> Many interviewees indicated awareness of fair dealing, although a few did not recognize the term. Of those aware, many indicated that there is more specifically "disagreement" over the term. A few stated that legislation and Supreme Court decisions provide clarity for stakeholders.

> Some PSE students said they suspect or are aware that some sharing and copying happens for education, which would be considered illegal. Copying and sharing print and e-books are seen by many students as ethically and morally a "grey area" and justifiable in certain circumstances.

> PSE students understand that accessing books for free when they are meant to be paid for has an impact on the people who produced the book, and ultimately leads to higher prices for books. Many expressed little sympathy, however, for the impact this has on book publishers.

> Interview respondents remarked that digital licensing arrangements can increase access for students while ensuring reasonable benefit for publishers: publishers know how much they are selling, the arrangements are easy for libraries to use, and students have greater access to material.

BOOK PUBLISHERS

> PSE students admitted little knowledge of the role of publishers in the educational sector. Mostly, students see publishers of academic books as responsible for "bringing it all together": choosing books to publish, commissioning authors to write a book, compiling sections and making choices about the flow and approach of the book, providing advances to authors, editing, and handling book design and layout. Some students pointed out that marketing textbooks is different from marketing consumer books because there is already a market for required textbooks.

> Some PSE students knew of self-published books being assigned for courses. Some noted that self-published books may be less durable, but almost no one expressed concerns with other aspects of self-published books, such as the quality of writing, the quality and accuracy of the content, or the usability and relevance to their studies. Some students feel that professors who assign self-published textbooks are demonstrating empathy for students in terms of the reducing cost to students of education and books.

BUSINESS MODELS

> A number of suggestions were provided to change the way that books are created, published and paid for: alternative business models that increase the benefit for authors and publishers along with consumers. These include:

- ◇ Making chapters or portions of books available
- ◇ Ensure a reasonable cost of textbooks
- ◇ Develop a rental or subscription model
- ◇ Combine books with supplementary content
- ◇ Treat e-books as living documents
- ◇ Relax restrictions on e-books
- ◇ Provide updates to K-12 digital texts
- ◇ Promote a diverse publishing industry
- ◇ Offer better metadata on publications
- ◇ Allow for advertising in textbooks

COMMUNICATION STRATEGIES

> In terms of mitigating unauthorized access to books, PSE students in the focus groups were sceptical that a public education campaign would change the behaviour of students. Some PSE students suggested strategies such as:

- ◇ Educating students about copyright
- ◇ Educating people on where the money goes from a purchase
- ◇ Reaching students and readers when they are young
- ◇ Explaining the role of publishers
- ◇ Informing how behaviour affects consumers
- ◇ Provide clearer information about meaning of copyright