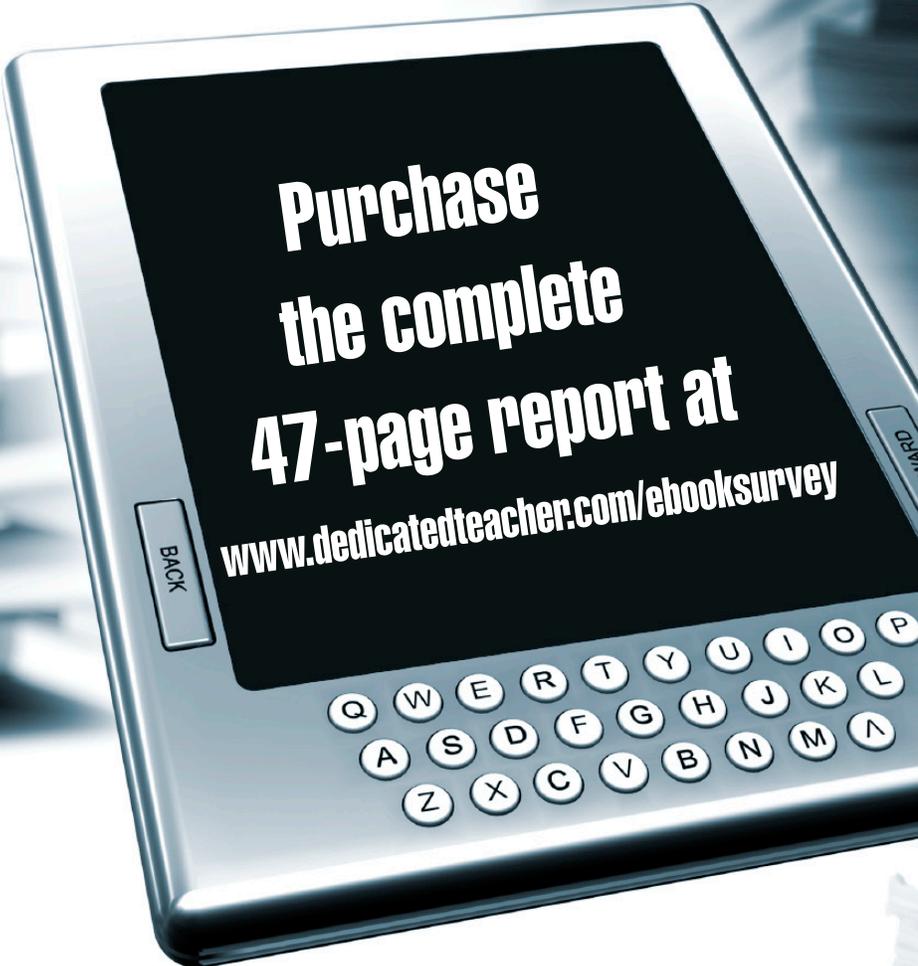


Executive Summary

eBooks: K-12 Educators' Usage and Attitudes

by John Fredricks, Ph.D.

Introduction by Neal Goff
President, Egremont Associates



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This document is an Executive Summary of the research report eBooks: K-12 Educators' Usage and Attitudes, which presents the findings of a survey of K-12 teachers and librarians conducted in the fall of 2010. The Executive Summary includes the following sections from the larger report:

Introduction

Background and Objectives

Summary of Results

To give you an understanding of what is covered in the full report, we have included the complete Table of Contents, which appears below.

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Introduction

eBooks and K-12 Educators: Librarians Lead the Way

By Neal Goff
President
Egremont Associates

A few months ago, I did a consulting project for a client that was planning to launch an eBook reader and was considering creating a unique version for teachers. One of the questions the client wanted me to answer was how many teachers were using eBooks, and to what extent they were using them in their classrooms.

Much to my chagrin, I couldn't find the answer anywhere—and thus was born the idea of conducting the survey that is the subject of this report.

In designing and fielding the survey, we were fortunate to get support from a variety of sources. John Fredricks, a former colleague from *Reader's Digest* who handled my division's research needs while I was President of Weekly Reader Publishing, signed on to design the questionnaire and write the survey report. MCH Strategic Data was generous enough to contribute email names and mail the survey to those names for us. And Lisa Schmucki of edWeb.net served as our project co-manager and all-around backstop.

John's excellent summary of the results and the detailed survey findings appear on the pages that follow. As I read the results, I was struck not only by the overall incidence of K-12 educators' use of eBooks but also by the differences *between* teachers' and librarians' eBook usage and purchase patterns.

At first glance, these differences don't appear terribly significant. Some 40% of the teachers we surveyed reported having bought eBooks in the past. The number certainly was higher — 50% — among school librarians, but not by an order of magnitude. Once we start digging a little deeper, however, teachers' and librarians' behaviors and attitudes really begin to diverge.

The biggest difference — which has an obvious explanation — is in the number of eBooks the average buying librarian has purchased compared to the average buying teacher. Librarians who bought eBooks for professional reasons in the past year report having bought an average of **844** of them. Obviously, these purchases are funded out of school library budgets, so perhaps the number is not as impressive as it first appears. But given the funding constraints that most librarians face, this number is a strong statement about how librarians are spending what little money they have, and a real indication that eBooks have established a solid position within many school librarians' collections.



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Librarians have long been the technology leaders at many schools – which of course is why many of them now have titles like “media specialist” or “instructional media director.” Here are some of the other interesting differences between teachers and librarians in their responses to our survey:

- More than 92% of librarians say that at least some of their eBook purchases are funded by their school. Only 30% of teachers say the same thing.
- 46% of teachers reported never having either bought eBooks or obtained them for free. Only 29% of librarians report no eBook acquisitions at all.
- eBook-buying librarians have bought an average of 17.9 eBooks for professional development purposes in the past year, compared to teachers’ average of 3.6 eBooks purchased for the same reason. (Again, I would surmise that this difference is largely a result of librarians’ being able to tap into their materials budgets to fund these purchases.)
- Almost half of teachers (46%) report using a search engine such as Google to find eBooks. That number is only 15% for librarians, who are more likely to shop at educational eStores or use other professional resources that are available to them.
- Interestingly, eBook-buying librarians are somewhat less satisfied with the experience than buying teachers. Some 65% of librarians report being extremely or very satisfied versus 78% of buying teachers. The extremely satisfied group comprises only 18% of buying librarians versus 41% of buying teachers.
- Among educators who have never bought eBooks, 21% of librarians say they are extremely or very likely to do so in the next six months, while only 9% of teachers say they are extremely or very likely to.

While this last statistic might imply that the K-12 educators who have not yet jumped on the eBook bandwagon are not likely to very quickly, it is easy to see how this can change. Again, looking at the intent-to-purchase question posed to educators who have not yet bought eBooks, we see 33% of both teachers and librarians saying they are “somewhat likely” to buy them in the next six months. And what would need to happen for them to take this plunge? “The price of eBook readers would need to be lower,” say 40% of non-buying teachers and 44% of non-buying librarians.

If there’s one thing we know about the price of eBook readers – and the price of new technology products in general – it’s that they tend to go down over time. Thus, to me it is plausible to conclude that many of the educators who are lukewarm about eBooks today are likely to become converts at some point in the future.

The detailed results will give you many more insights into teachers’ and librarians’ buying patterns, eBook usage, attitudes and future plans. If you’re in a business that either is, or soon will be, feeling the impact of eBooks – as you probably are – we trust that you will find the full report both interesting and valuable. And whether you are more interested in teachers’ and librarians’ aggregate responses or in viewing each group as a separate segment, one thing will be clear to you as you read this report: eBooks are becoming an important part of the professional lives of K-12 educators, and librarians are leading the way.



eBooks: K-12 Educators' Usage and Attitudes

By John Fredricks, Ph.D.

Background and Objectives

eBooks are changing the shape of publishing and revolutionizing the way readers interact with books.¹ Their impact on education has not (yet) been as profound, but it is likely just a matter of time before they bring significant changes in the way teachers teach and students learn. In order to understand better a variety of issues pertaining to educators' attitudes and usage of eBooks, Egremont Associates fielded a survey of some 1300 K-12 educators – slightly more than half of whom were teachers, and the rest school librarians – in August and September of 2010.

The specific **objectives** of the survey were to determine:

- The incidence of eBook purchasing among educators, and the extent to which educators purchase and use them for professional purposes
- A profile of eBook purchase behavior: The number of eBooks purchased in the past year, websites where eBooks are purchased, format(s) purchased, purchase expectations for the current school year, etc.
- eBook reader ownership and the types owned
- How eBook purchases are funded
- How teachers use eBooks in the classroom
- Educators' perceptions of the impact of eBooks on students' reading comprehension
- Experience with eBook publishers
- Satisfaction with eBooks
- Attitudes towards specific aspects of eBooks
- Likelihood of purchasing eBooks among current non-purchasers
- Likelihood of purchasing eBook *readers* among current non-purchasers
- Potential purchase drivers of eBooks and eBook readers



¹ “eBooks” are defined as electronic versions of traditional print books that can be read by using an eBook reader, a personal computer, and some types of cell phones.

Summary of Results

Almost half of K-12 educators — and exactly 50% of school librarians — have purchased eBooks. Those who have purchased them for professional use within the past year are pleased to have done so; close to three-quarters (71%) report being extremely or very satisfied with the experience. They also plan to keep buying, with slightly more than half saying they will increase their purchases in the coming school year (and less than 10% saying they will buy less). Moreover, 75% of these eBook buyers believe that eBooks will have a somewhat or extremely positive impact on students' reading comprehension.

Educators who have not yet bought eBooks for either professional or personal use, however, do not appear poised to jump on the eBook bandwagon terribly quickly: only 14% say they are very or extremely likely to buy eBooks in the next six months. The cost of both eBooks and eBook readers is the major obstacle. As the prices of eBook readers come down, it is possible that this obstacle will become less of an issue.

School librarians are more involved with eBooks than are teachers — in part, it appears, because their eBook purchases are more likely than teachers' to be funded by their schools. The level of librarians' eBook purchases increases from elementary schools to middle/junior high schools to high schools.

Teachers who buy eBooks for professional reasons generally pay for them out of their own pockets and buy them for professional development purposes. Specifically:

- Seven out of ten (70%) of teachers use their own money to pay for the eBooks they use professionally, with no funding provided by their school.
- Teachers are more likely to purchase eBooks for professional development (i.e., to become a better educator) than they are to use them in the classroom. Those who **do** purchase eBooks for classroom use them for assigned and guided reading. (One possible way to stimulate eBook purchasing for classroom usage might be to conduct workshops or webinars to instruct teachers on **how** to use eBooks in the classroom.)
- Regardless of whether they have purchased eBooks for professional development or for classroom use, teachers buy fewer eBooks than librarians do.
- The vast majority of teachers (85%) purchase eBooks one at a time as opposed to via subscription plans.

The most popular formats of eBook purchased by teachers and school librarians alike are .pdf (Adobe) and .azw (Kindle).

K-12 educators who buy eBooks for professional purposes mainly purchase them from consumer websites.

- Educators are more likely to find and purchase their eBooks for professional use from consumer websites like Amazon and barnesandnoble.com than from eBookstores that serve the educational market. However, school librarians use educationally focused eBookstores and/or Websites more than teachers do.
- Among educational eBook publishers, educators indicate the most awareness of — and purchasing from — Scholastic.



Educators who purchase eBooks are generally satisfied with them, believe that eBooks will have a positive impact on their students, and expect their purchasing to increase.

- As mentioned, about seven out of ten (71%) eBook purchasers are satisfied with eBooks, with teachers reporting more satisfaction than librarians.
- The majority of eBook buyers have positive attitudes toward eBooks as measured by their agreement with ten attribute statements. About eight out of ten or better feel that eBooks are convenient, a good value, easy to use, easy to buy, and easy to download.
- Relative to the most favorably rated attributes, both teachers and librarians expressed more neutrality towards three lower-rated items: eBooks are easy to find; there is always a good selection of eBooks to choose from; and eBooks are less expensive than print books.
- As mentioned, three-quarters (75%) of eBook purchasers feel that eBooks will have a positive impact on students' reading comprehension.
- A slight majority (52%) of buyers indicated that they expect their eBook purchasing to increase in the 2010-2011 school year.

Educators, especially teachers, who are not currently purchasing eBooks are not very likely to do so in the near future. Why not? The main barrier is price: they feel the price of eBooks and eBook readers needs to decrease.

- The majority of non-buying teachers expressed *little to no interest* in purchasing eBooks: Nearly six out of ten (59%) reported that they are not very/not at all likely to purchase in the next six months. The price of both eBooks and eBook readers would need to be lower in order for them to consider purchasing.

Moreover, eBook purchasing does not necessarily imply eBook reader ownership.

- Only about half (48%) of the educators who reported having purchased eBooks in the past year for professional purposes indicated that they own an eBook reader.

If educators own an eBook reader, it is most likely a Kindle:

- eBook reader owners reported the most ownership of the Kindle (54%), with the Nook running at a distant second (21%). Although the iPad is a fairly recent entry, 16% of the eBook reader owners report owning one. In contrast, the Sony Reader, which was first introduced in 2006, is owned by just 11% of the eBook reader owners.

As with eBooks, if educators do not currently own an eBook reader, they are not very likely to buy one in the immediate future. Again, the main hurdle is the cost of the devices.

- Among the educators who do not currently own an eBook reader, only one out of five (20%) indicated that they are extremely or very likely to purchase one in the next six months. Nearly two-thirds (63%) of these educators indicated that the price of eBook readers would need to be lower in order for them to consider making such a purchase.



About the Authors

John Fredricks is a market research and consumer insights professional with 25 years of experience working with major media, educational, hospitality and travel brands on both the supplier and advertising agency side of the business.

In his most recent role as Director of Global Market Research at *Reader's Digest*, John was responsible for leading all research activities for a number of businesses (*Reader's Digest*, *Weekly Reader*, *Every Day with Rachael Ray*, *Fresh Home* and *Select Editions*), from needs assessment, branding and segmentation to new concept testing, product optimization, and customer satisfaction. Among his significant previous positions, John served as a senior research analyst for Marriott International and for Eric Mower & Associates, the largest independent advertising agency in upstate New York.

John holds a Bachelor of Arts degree from Dominican College as well as a Master's degree and Ph.D. in social psychology from Syracuse University.

Neal Goff, the founder of consulting firm Egremont Associates, LLC, has more than a quarter century of experience in product development, marketing and general management in educational, consumer and business-to-business publishing.

Neal founded Egremont Associates at the beginning of 2010 after leaving his position as President of the Weekly Reader Publishing Group. He joined Weekly Reader in 2004 and became President in late 2005, with P&L responsibility for Weekly Reader's 12 classroom magazines. At Weekly Reader, his role grew to include managerial responsibility for the company's Custom Publishing business, library publisher Gareth Stevens Publishing, World Almanac Education Library Services, and the Facts For Learning database business.

Neal started his publishing career as a newspaper and magazine editor and spent more than a decade at Time Inc., where he held senior positions at Time Life Books and Book-of-the-Month Club (BOMC). At BOMC, he directed the development and successful launch of Children's Book-of-the-Month Club. He later became President of Simon & Schuster's direct mail division, Prentice Hall Direct; Chief Operating Officer of database publisher R.R. Bowker; Senior Vice President of Marketing at BMG Direct, then the world's largest music club company; and President of Scholastic Library (formerly Grolier Reference) Publishing.

Neal is President-Elect of the Association of Educational Publishers Board of Directors and also serves on the Board of Directors of the Urban Education Exchange.



About the Sponsors

Egremont Associates

Egremont Associates helps publishers and technology companies respond to — and stay ahead of — the changes that are reshaping educational and consumer publishing in the 21st Century.

Drawing on the expertise of its founder, Neal Goff, Egremont Associates assists clients on a variety of projects, with particular focus on digital product development, market expansion through both online and off-line channels, direct marketing strategy and tactics, and development of strategic alliances. Working by itself or in collaboration with other consultants, Egremont Associates helps companies develop new products, bring those products to market, expand into new channels, and adapt to the technological changes that are revolutionizing how people seek, find and consume information.

For more information, contact Neal Goff at 917-541-4034 or via email at nealgoff@gmail.com or visit www.EgremontAssociates.com.



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For more information, contact John Hood, president, at 800-776-6373 or by email at johnh@mchdata.com. Visit the MCH Strategic Data website at www.mchdata.com.



TecKnoQuest Inc. operates the TecKnoQuest Digital Distribution Network, an innovative, unique and timely way for publishers, content developers and retailers to take full advantage of the growing demand for digital products such as eBooks and whiteboard applications.

TecKnoQuest has been selling and distributing digital materials in the K-12 space for over ten years. It currently features products from over 200 publishers; its current collection contains more than 25,000 digital products. In addition to being a retailer itself, TecKnoQuest offers other retailers around the world the option of selling digital products through its network.

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