

LightSail State of the Ebook Market: Survey, January 2015

In December 2014, LightSail invited district and school leaders to take a survey on the ebook market. LightSail sought to understand the perspectives of education leaders, and to inform its 400+ publisher partners of the needs of today's educators.

Between December 4th, 2014 and January 20th, 2015, LightSail received responses from 475 educators, 75% of whom were district or school leaders.

Their responses suggest a surging ebook market, with strong demand for new technologies built around ebooks, as well as questions about the newest ebook purchasing models.

Highlights from the survey:

K-12 DECISION-MAKERS PREDICT MASSIVE GROWTH IN EBOOK SHARE.

Educators were asked their expectations about the use of ebooks: "Today, what percentage of the books read by your students are ebooks?" and "In 2 years, what percentage do you expect will be ebooks?"

Noteworthy insights from the responses:

- 94% of respondents predicted an increase in the next 2 years.
- 59% report that ebooks currently account for fewer than 10% of books read.
- 52% expect that, within two years, ebooks will account for more than 40% of books read.

Responses:

ebooks as a % of books read by students	Today		In 2 Years	
	Respondents	Share	Respondents	Share
None	54	11%	2	0.4%
1-10%	224	47%	33	7%
10-20%	99	21%	79	17%
20-40%	58	12%	115	24%

ebooks as a % of books read by students	Today		In 2 Years	
	Respondents	Share	Respondents	Share
40-60%	26	5%	136	29%
60-80%	11	2%	79	17%
80-100%	3	1%	31	7%

K-12 LEADERS ARE SEEKING INSTRUCTIONAL TOOLS AND MATERIALS DEVELOPED AROUND EBOOK CONTENT.

Educators were asked about their research on technology solutions for literacy:

Has your district looked into digital literacy solutions / ed tech tools that would: *		
	Yes	No
Differentiate/personalize materials based on student reading level	<input type="radio"/>	<input type="radio"/>
Assess students while reading	<input type="radio"/>	<input type="radio"/>
Measure student reading behaviors (ex. monitor reading time, books read)	<input type="radio"/>	<input type="radio"/>
Allow student annotations inside of eBooks	<input type="radio"/>	<input type="radio"/>

District and school leaders show strong interest in technology tools for literacy:

- 86% have researched at least one of these tools.
- 58% have researched 3 or more tools.

Number of tools researched:



DECISION MAKERS EXPRESSED A STRONG PREFERENCE FOR PURCHASING EBOOKS IN THE LIBRARY MODEL, YET THE MARKET NEEDS ADDITIONAL EDUCATION ABOUT OPTIONS.

Educators were asked, “Which model for purchasing ebooks works best for your district?” Respondents expressed a clear preference for the Library model, yet one of the other primary responses was “I don’t have enough information to know.”

Preferred ebook purchase model	Respondents	Share
Library model: purchase texts to be owned by school in a library model (check-in/check-out)	189	40%
I'm not sure: I don't have enough information to know	192	40%
Subscription: monthly fee per student, access to broad library, akin to Netflix	75	16%
Rental: single, time-limited checkout per rental (example: 1 book for 1 student for 30 days)	19	4%

In addition, 47% of respondents requested more information on the ebook market. Clearly educators would value greater clarity around their options.

SCHOOL AND DISTRICT LEADERS EMBRACE THE MIGRATION TO DIGITAL BOOKS.

Of those expressing a preference, the vast majority indicated reading in digital texts moving forward with only a minority preferring that students read in paper texts.

When asked, “All things being equal, which do you prefer moving forward?” education leaders responded:

Preference	Respondents	Share
Students reading in digital books	245	52%
Students reading in paper books	37	8%

Preference	Respondents	Share
I have no preference	191	40%

EBOOKS ARE BEING USED FOR MULTIPLE INSTRUCTIONAL PURPOSES.

Schools and district leaders report that ebooks are being used across instructional models; the average respondent is using ebooks for 2.3 instructional models:

Instructional Model	Respondents	Share
Independent reading	428	90%
Balanced literacy	110	23%
Book club / literacy circle	139	29%
Small group literacy instruction	196	41%
Whole class instruction	207	44%

EDUCATOR CONCERNS ABOUT THE EBOOK MARKET ARE VARIED.

Respondents were given the option to share “concerns about the ebook market that you would like publishers to consider.”

Top concerns cited include:

- Challenges finding all desired titles in ebook format. One respondent wrote, “It is frustrating that certain titles are available for individuals to purchase, but those same titles are not always available for libraries. The families and administrators get very confused on how that can happen.”
- Ensuring that the reading experience honors pedagogical needs. Sample comment: “ebooks need to be better tailored for the study needs of students. For example, taking marginal notes rather than using note boxes would be more effective. Also, improved navigation ability that permits students to quickly revisit pages they have already read would be helpful.”
- Ensuring that students accessing ebook libraries “are selecting content appropriate for their social/emotional level.”

- Overall cost of transition to ebooks, and questions about access to ample devices to support student use of ebooks.
- Access to ebooks across platforms, including web access.

ABOUT THE SURVEY

Between December 4th, 2014 and January 20th, 2015, 475 educators responded to the ebook survey conducted by LightSail. Respondents represented schools and districts from more than 35 US states.

Survey respondents by role:

Role	Respondents	Share
School Leader	266	56%
District or Charter Management Organization Leader	91	19%
Teacher or School Staff	100	21%

For additional information about the State of the Ebook Market survey, please contact LightSail at info@lightsailed.com.