Are Textbooks Dead?

Making sense of digital transition

College administrators and faculty are struggling to make smart decisions in the midst of a barrage of information. Some of what they’re hearing and reading is confusing, some of it is exaggerated and some of it is just wrong. Changes in digital course materials are moving forward swiftly, but not at warp speed.

The challenge is to navigate digital opportunities without losing sight of learning outcomes, costs and wear and tear on students, teachers and institutions. A nimble but careful move forward requires dependable partnerships, fresh thinking and a genuine understanding of the risks and rewards.

To help make sense of the digital transition, this is an assessment of how course materials will evolve and Follett Higher Education Group’s predictions for the near- and long-term future of digital learning.

WHAT'S INSIDE?

- The textbooks that will forge the path to digital
- Follett’s philosophy on the two ways digital will evolve
- Seven critical considerations for creating a digital course material strategy

There’s time for comprehensive solutions and strategies, but no time to waste on the device du jour or untested guidance.
Where the Digital Transition Will Take Hold First

Despite all the noise about devices and digital textbooks, the evolution to digital is happening at a measured pace. Publishers say that approximately 30 percent of their business is “digital,” but only a small fraction of that represents a digital version of the traditional printed textbook. Though student interest and demand for digital products continue to rise, a complete shift to digital will not take place overnight.

As administrators and faculty think about new strategies to prepare for the transition, it is important to consider where the transition will take hold first. A Follett analysis notes that currently 80 percent of course material sales come from just 10.5 percent of traditional textbook titles. These traditional texts are put out by six major publishers and cost on average, more than $75. They have significant pedagogy with two page spreads, color graphics and have many chapter exercises.

“If you follow the money, then you begin to see where the digital transition will take shape first,” says Gary Shapiro, senior vice president of intellectual properties at Follett Higher Education Group.

As the campus appetite for digital materials increases, it stands to reason that publishers and providers will concentrate first on evolving a select group of textbooks because they are most widely used and produce the most revenue.

Most Revenue from Traditional Text

50% of retail = 3,585 titles (2.51%)
80% of retail = 15,066 titles (10.55%)
100% of retail = 142,762 titles (100%)

**TRADITIONAL TEXT**
- Six major publishers
- One text per course
- Significant pedagogy
- Two-page spreads; graphics; color; chapter exercises
- Highlighting/underlining; memorization
- Publisher support
- Average price: More than $75

**TRADE BOOKS & MONOGRAPHS**
- 8,000 publishers/distributors
- Original materials
- Multiple books per course
- Linear reading
- Average price: Less than $50
Two Paths: Native Digital and Enhanced Print

“We believe that the textbook titles that drive 80 percent of the market will evolve in two core ways,” says Shapiro. “The discipline of the textbook will help determine how technology changes course materials and how fast they evolve. At Follett, we are calling the two paths native digital and enhanced print.”

Native digital course materials are similar to traditional software or web-based content, allowing for adaptive learning opportunities. With native digital, learning takes place in relative isolation.

“You can’t print and use native digital course materials. They are interactive pieces of software. A widely available example is My MathLab,” says Shapiro. Similar to traditional software or web-based content, native digital’s progress will be rapid and rooted in problem-based disciplines.

Native digital requires a high degree of interaction with the material, so students need a fast connection and speedy input. Currently laptops, desktops and netbooks work best. Tablets, in their current form, are not ideal because of the amount of steady input necessary.

Interactive homework management and assessment tools will help encourage better student performance, engagement and retention. Faculty can select customized products, and they will drive purchase decisions by tightly integrating native digital products into the curriculum. And although this product might be more expensive initially, the volume of sales should result in increased opportunity for lower unit costs. The logical result is more faculty demand, more publisher investment and faster growth.

Moving more deliberately and with greater complexity, enhanced print course materials are digital replicas of printed textbooks or course materials. “Follett’s CafeScribe platform is an example of this,” said Shapiro. “It’s a digital replica of the printed textbook, but the platform includes digital enhancements and study tools,” he continued, citing features which enable students with a few mouse clicks to easily prepare custom study guides, as well as add notes and highlights to books even while offline. Students can also interact with their peers and professors by sharing notes and insights. Faculty, in turn, can customize materials by adding their own notes and viewpoints right within the text.

The give-and-take of enhanced print presents enormous opportunities for theory-based disciplines, such as sociology and political science. Enhanced print users need a reading device with a good connection, significant memory and a quality display. Right now, laptops and desktops dominate, but there will continue to be a shift to tablets, as they become more affordable and are built to handle digital innovations.

Students will wield the power to choose enhanced print materials among a range of other choices, including traditional printed texts, new, used and rentals, all from a variety of providers. Cost remains a major factor and is a key consideration in student purchase decisions. This fragmentation limits publisher investment and inhibits growth compared with native digital, where there is no format choice.
What it Means for the Future

Learning materials will be increasingly complex, but most experts agree that print will continue to dominate for the next two or three years with a growing use of digital resources in problem-based courses. In the next five to seven years, Follett predicts traditional print purchases will drop by about half. Custom (text) and bundling print and digital will decline as well. Native digital and enhanced eBooks will pick up the slack, with the greatest gains forecast for native digital.

In the next two or three years, sleek high-end tablets will begin to edge out their electronic ancestors. By the end of the decade, sophisticated tablets will be the primary platform, leveraging the power of technology with dazzling images, vast memory, speedy connections, convenient applications and links to faculty and other students.

As the future unfolds, cost will depend on factors including demand, campus licensing, partnerships with content providers and the degree of customization. Follett is partnering with campuses to explore business models that would incorporate the cost of digital course materials into tuition or fees, a significant opportunity to reduce the overall costs to students and ensure that students have the right course materials on day one of class.

What all this means in real terms is that the digital transition is well under way but its evolution is manageable and the academic path nuanced.

How the Market for Course Materials Evolves

<table>
<thead>
<tr>
<th>Product</th>
<th>TODAY</th>
<th>NEAR TERM (2-3 years)</th>
<th>LONG TERM (5-10 years)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mostly print replica or pass-code to supplemental content</td>
<td>Some native digital and enhanced print Print remains &gt;50%</td>
<td>Intro courses move to digital although print still significant</td>
</tr>
<tr>
<td>Student</td>
<td>Primarily focused on print</td>
<td>Growing interest in digital Price remains a major factor</td>
<td>Tablet ownership significant Institutional CMS purchase decision</td>
</tr>
<tr>
<td>Faculty</td>
<td>Very diverse attitudes toward digital Adjuncts teach most intro courses</td>
<td>Growing use of digital in problem-based courses Adjuncts remain; central CMS decisions begin</td>
<td>Certain disciplines have widespread adoption of digital</td>
</tr>
<tr>
<td>Platform</td>
<td>Primarily laptops</td>
<td>Primarily laptops with some use of higher-end tablets</td>
<td>Primarily tablets</td>
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As the market continues to evolve, the new paradigm will be in pieces and parts, with many options. “Institutions need to think strategically about standardization, and Follett can help, said Shapiro. “In the past, when somebody said, ‘go get me a book,’ we simply pulled it off our shelf. We were book butlers. Now Follett plays more of a consultant role, helping universities navigate the many course material options and helping them think through their overall course material strategy to keep student learning first and foremost.”

“If there’s no policy, no institutional standard, students and faculty will squander valuable time wrestling with options and technology,” cautions Shapiro. “Our goal? Help make it easy for campuses to navigate their course material options and, in turn, help teachers teach and students learn.”

How can decision makers put technology in its place?
There are seven key considerations:

1. Develop a strategy to address issues surfacing as course materials evolve from print to digital.
2. Give key stakeholders a chance to bring their ideas and concerns into the decision-making process, a collaboration that offers the best prospect for practical solutions and long-term success.
3. Consider IT support when making digital course material choices – both how the material might work in conjunction with existing campus technology and also how much time students and faculty will require to become familiar with the platform.
4. Standardize platforms and applications adopted and used by faculty and students, minimizing IT support and reducing learning curve.
5. Take advantage of the campus bookstore’s ability to leverage established relationships with publishers, soliciting and vetting faculty adoptions, then aggregating and making them conveniently available.
6. Guard against quickly adopting technology because of pressure from industry “noise.”
7. Be willing to relinquish the past.

DEVICE CONSIDERATIONS

When it comes to digital course materials, it’s easy to get caught up in a discussion about the device itself and not think about how the content will work on the device. With all of the noise around tablets, it is important to remember that devices like tablets don’t currently lend themselves to most native digital options due to native digital content requiring a reliable and fast connection with easy input. On the other hand, enhanced print products tend to work very well on today’s tablets.

When considering the role of devices, some of the questions that need to be asked are:

1. Does the device support the unique content critical to teaching and learning?
2. Will students use a dedicated reading device or prefer a multipurpose device?
3. Is the device affordable for students, especially with the additional cost of content?
“We’re being challenged to educate 21st century students for the 21st century world,” says Samantha Birk, Associate Director for Instructional Technology at Indiana University – Purdue University Fort Wayne. “Some of our faculty felt apprehensive about what it would mean in the classroom.”

The University’s response, as part of a larger challenge, Re-imagining IPFW’s Academic Future, was to outfit 70+ faculty members with iPads, asking them to “re-imagine the future” of learning. Using Follett’s CafeScribe platform and other digital learning and teaching tools, the faculty was challenged to use technology to better teach and engage their students. It has rolled through the campus like wildfire. She calls the pilot program a powerful catalyst. “Now they’re thinking about turning their book into apps, finding greater ways to comment on texts. Now it’s not mysterious. They have a tool they can use.”

Describing faculty feedback, she says, they’re empowered by CafeScribe’s feature allowing them to comment on the textbook. “Students look at textbooks as being the definitive point of information. And for the faculty member to go in and make a comment to say ‘I disagree with this point’ starts to open up the dialogue and the exchange of ideas in ways we really haven’t seen much in higher education.”

Birk notes Follett’s willingness to act as a broker, working not only with publishers to get titles but to enrich content. “Follett is becoming more than just a source for books. They are a resource for finding, buying and using digital course materials. And they are in a position to really listen to what educators want and what IT needs to deliver the goods.”

Digital? Technology? She calls it “a grand adventure.”