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Book Industry Study Group

# DISCUSSION PAPER



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## ***Managing Change***

### **BISG's Making Information Pay 2010**

*Selected Survey Results*

by Mike Shatzkin

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*An online version of this Discussion Paper, with a place for industry comments, is available at <http://www.bisg.org/contentweb/papers/mip2010/>*

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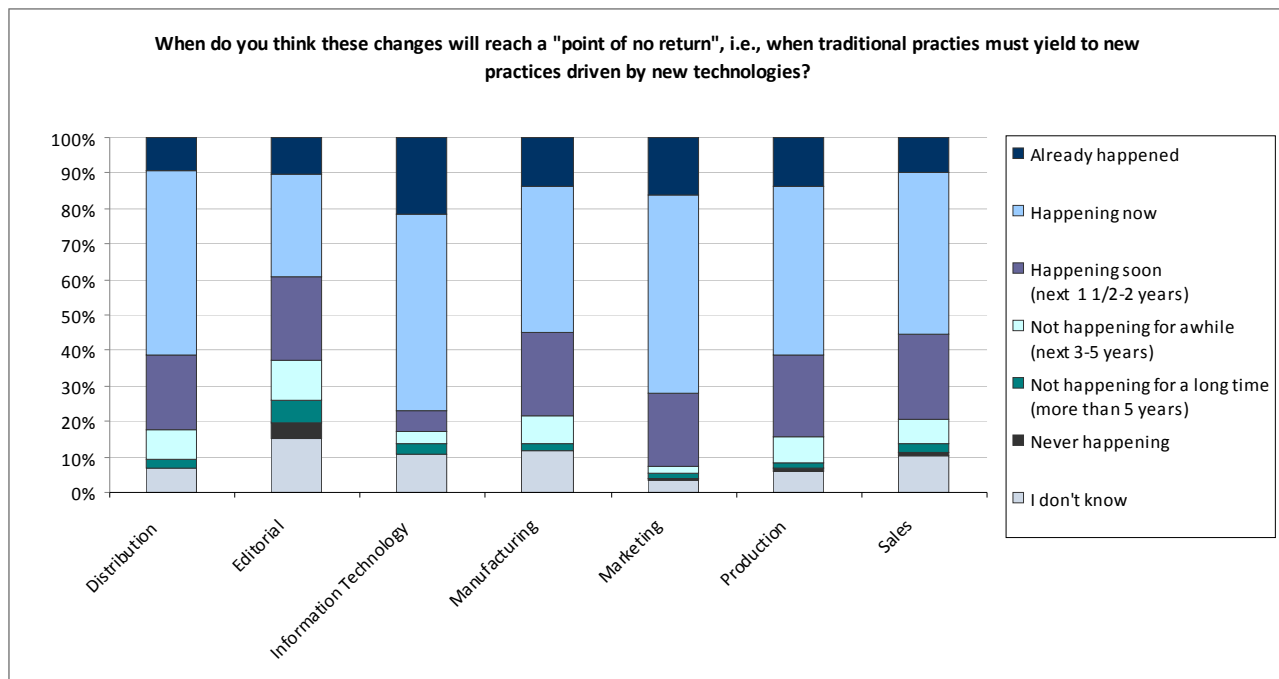
## Overview

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For the third year in a row the Book Industry Study Group (BISG), in conjunction with The Idea Logical Company, conducted a pre-event survey in the run up to the annual *Making Information Pay* (MIP) conference, held May 6, 2010 in NYC. The theme of this year's event *Making Information Pay* was "Points of No Return," — an exploration of when technological change causes such disruption to publishing processes and practices that old skills and jobs become obsolete.

This Discussion Paper contains quantitative results from the survey, as well as analysis of select responses by Mike Shatzkin of The Idea Logical Company.

To set-up the story you're about to read, as illustrated in the graph below, the overwhelming majority of the 177 pre-event survey respondents said they believe that in most functional work areas (e.g., marketing, distribution, etc.), technological tipping points are happening now, or have already taken effect.



## An Invitation from Scott Lubeck

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Rather than drive fear into the hearts of those trying to navigate the complexities and novelty of change, the aim of BISG's *Making Information Pay 2010* conference was, as always, to empower today's book industry with plans for action that create new value for authors and readers alike.

Unquestionably, the book Industry is in a period of significant transformation. Digital change, in particular, is unavoidable — and the direction is one way. We will not suddenly find the number of bookstores growing or the e-book market shrinking. Even those publishing segments that have traditionally been ahead of the curve — professional, academic and educational, for example — will find digital delivery accelerating as we get close to a world where everybody has a computer in their hand all the time. Leading into the *Making Information Pay 2010* conference we opened a discussion with our members about this transformation through an attitudinal survey of conducted in February and March of 2010. The answers to this survey demonstrate where this transformation is taking place, what it means for the industry and, more specifically, what companies are doing about it.



**Scott Lubeck**  
Executive Director  
BISG

We would like to keep this discussion going. To do this, we have published the results of this survey, both as a PDF document and on our website (<http://www.bisg.org/contentweb/>) in a mode that enables you to share your insights, comments and plans with others in the book industry.

Here are some questions suggested by the responses we received that might be worth further conversation online:

- Do you think change is over and done with at your company or is there more to come?
- What is the primary driver of change: technology or customer requirements?
- What are the points of no return in your company?
- What kind of training are you getting at your company?
- Is editorial immune to change?
- Is Twitter destined for the dust bin?

We hope you'll join us online to discuss!

Sincerely,

Scott Lubeck  
Executive Director  
Book Industry Study Group

## An Analysis of Selected Survey Responses

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BISG commissioned conference organizer and industry expert Mike Shatzkin to address selected pre-event survey results with some attempts at interpretation and analysis, which is presented here. Although as sometimes happens, a few answers can seem to contradict others, the overall impression is of an industry that has gone through a lot of change and is still expecting more. A list of quantitative responses to the survey questions can be found on at the end of this paper (page 13).

1. **We asked respondents whether they have seen or expect to see fundamental change in their own functional work area.**

- 45% said it is happening now.
- 31% said it has already happened.

While the movement of consumers from print to digital has caused great disruption and threatened bricks-and-mortar bookstores, the answers to this question suggests that at least some in the industry (31%) might think that a period of change is behind us.

2. **Respondents were then asked whether they expect a significant change to the workflow in their functional work area in the next two years.**

70% answered yes. Based on the number of total responses for this question and Question 1 above, this 70% included some of the respondents that answered “it is happening now,” and “it has already happened” in Question 1. This is an encouraging sign of self-awareness within the industry because it indicates that while many in the workforce understand that there has already been great change, most realize that more change is still to come.

3. **We asked respondents what they thought were the primary drivers for change in their functional work area.**

- 91% said “new tools and technologies.”
- 62% said “new customer requirements.”
- 63% said “new product opportunities.”
- 55% said “cutting costs.”
- 42% said “increasing revenues.”

Of course, none of the choices listed above were mutually exclusive and most people picked more than one. But the fact that 91% of respondents believed the presence of new tools and technologies is driving change suggests the continuing importance of IT departments and a technologically capable workforce able to filter the new technologies and select what makes sense for a publishing enterprise.

62% of respondents felt that new customer requirements were driving change. This is interesting in light of how new technology enables customers to have new expectations and

make new demands. As one respondent suggested, “The point of no return will be pushed further by consumers embracing new technologies and providing feedback of what they want.”

4. **We asked respondents if they could identify specific indicators of the “points of no return” due to new technologies across functional work areas. We knew this question would be subject to interpretation, but we did get some interesting answers that indicate some common themes. Some of those answers included:**

- **Distribution:** the growth of print on demand; increased sales of digital books.
- **Editorial:** digital workflows; increased concentration on enhanced/multimedia products; fewer editorial staff; the outsourcing of editorial work.
- **Information Technology:** investments in digital asset management systems; increased in-house IT capabilities.
- **Manufacturing:** the adoption of short print runs; print on demand; digital first publishing. One respondent noted that manufacturing “will change in tandem with changes in distribution.”
- **Marketing:** the end of print advertising; online marketing and increased use of social media; focus on end consumer.
- **Production:** digital first production; full XML implementation (“one file, multiple outputs”). Some respondents saw change in production linked to changes in manufacturing.
- **Sales:** the disappearance of bricks-and-mortar bookstores and the end of field sales force; greater understanding of e-books by the sales force; enlistment of authors and editors in the sales process.

In addition, respondents also said they predict a collapse of the differentiation among production, manufacturing and distribution roles. They see the rise of e-books, digital distribution and print on demand technology as fundamentally changing the way these three functional areas have traditionally worked and interacted.

5. **Respondents were asked whether they thought that the changes being wrought in publishing would lead to more jobs or fewer in their functional work areas.**

Of those expressing an opinion (about half the total respondents), 23% predicted workforce expansion and 24% thought jobs would be cut back. Over 50% of respondents didn’t know one way or the other. Comments indicate that many see current roles being cut or changed, with new roles and responsibilities ultimately taking their place.

6. **We asked whether respondents thought their skill set would “match the industry's future needs in their functional work area.”**

More than three times as many respondents were optimistic that their skills would match than did not (62% to 20%.)

**7. We asked respondents what overall response their companies have taken to address change within the respondents' functional area.**

- About 80% said their companies have put in new systems and tools.
- 44% saw shifts in budget allocations.
- 43% saw changes in workflow.
- 37% saw their companies teaching new skills.

**8. As a corollary to Question 7, we next asked respondents whether they could identify specific new processes, practices or methods their companies had recently implemented. Those that could identify these changes were then asked to specify what those changes were.**

Sixty percent of respondents (56 of 93) answered "yes," they were able to identify specific new processes, practices or methods instituted by their companies. While answers varied, of the 56 respondents that answered "yes," 32% (18 of 56) noted that their companies have already established or are in the process of implementing XML or digital workflows.

Respondents also noted new digital asset management systems, database updates and improved metadata handling. Other company changes included an increased social media presence, an updated and improved websites and more direct consumer engagement. Several respondents also noted that their companies were beginning to make staffing decisions based on evolving digital needs.

Two of these new practices really stood out:

- "We have a digital editorial board once a month to discuss digital only products."
- "Every hard copy has a digital component (not just a book but...adjunct website, online instructor info, interactive blog for professors who adopt the book...)."

During *Making Information Pay 2008*, which focused on experimentation, one of the pioneering initiatives covered was Wiley's differentiation of process for considering digital verse print proposals. The point made then was that digital projects are different and require different criteria and skill sets to evaluate them. The first comment above confirms that Wiley's formerly "experimental" approach is being adopted elsewhere; I expect to see this become more widespread.

The second comment reflects the reality that print and digital will co-exist for as long as print exists. This particular comment came from someone working in textbooks, but the ideas that

the digital product can enhance the print product or that the print product can be an on-ramp to a digital experience are ones that all publishers must consider.

**9. Respondents were also asked to identify what *they* thought would be the best response to change for their company to make, as opposed to responses their companies are actually making (see Question 7).**

Nearly half of respondents (48%) thought their companies need to provide more education. About the same number (48%) thought that what their companies are already doing (in Question 7) is on the money.

**10. We asked all respondents what publishing functions (distribution, editorial, information technology, manufacturing, marketing, production and sales) would be subject to “fundamental change.” Respondents were also asked to comment on their replies.**

Respondents largely agreed that all functions are currently changing or will be changed by new digital technologies. Responses ranged from 82% expecting fundamental change in sales and marketing to 92% expecting fundamental change in distribution.

Only 59% of all respondents said they expect fundamental change in editorial. Editors themselves were actually the group least likely to think editorial is changing—of the respondents who identified editorial as their primary functional work area, only 45% said they expect fundamental change.

The open-ended responses shed some light on why relatively fewer respondents thought the editorial function would change. The responses suggest that while people certainly see the editorial workflow changing to digital, they do not see that the *fundamental role* of an editor changing.

- “Editing is editing, even if you’re doing it in a different form.”
- “The function of acquiring and adding value to ideas expressed in language will always be at the core of what editors do.”
- “I don’t think novels will change, and I don’t think enhancement (whatever that means) will change editorial roles.”

The change respondents *do* say they see for editorial is the introduction of XML or digital workflows and the end of hardcopy manuscripts. Other expected changes include acquisition and rights complications for e-books and enhanced multimedia books (acquiring both print and digital rights, “enhanced e-books become an expectation,” as well as copyrights of third-party material “which often must be deleted from e-editions”) and the potential outsourcing of editorial work (“ability for authors to ‘farm out’ to cyber editors and retain control of final product;” “editors work as independent contractors”). Some also worry about the devaluing of editorial work and the potential degradation of content quality as the industry moves forward.

The shift to digital strikes me as requiring a re-think of editorial from the beginning: what is acquired, what a publisher can afford to pay for it, how the author interaction works during development and production and what the final product is (enhanced e-books, anyone?). That 40% of our respondents didn't anticipate fundamental change in editorial may be an early warning that the move to digital may blindside more than a few people working in publishing today.

**11. We next asked respondents when they thought that a tipping point will occur in each of the publishing functions; i.e., "when traditional practices must yield to new practices driven by new technologies."**

Substantially more than half of all respondents indicated that everything *but* editorial has already changed or is changing now.

For editorial, adding together "has happened" with "happening now" still only to 40%. The combined totals for the other functions are as follows: distribution 62%; information technology 77%; manufacturing 55%; marketing 72%; production 62%; sales 56%.

What is also surprising about this perception is that in the digital era, editorial should be working more closely with other parts of the company. In pre-digital days, editorial could operate quite apart from the rest of the company until the complete manuscript and artwork were ready for a handoff to production. In the digital age, particularly with an XML workflow (which, as noted above, is becoming increasingly common), the interactions between editorial and other departments are more frequent and must occur as early as the authoring stage. That constitutes a change for editors that is widely perceived by industry observers; it is noteworthy that the wholesale change in the editorial function that I would anticipate is not reflected in the responses.

**13. We asked respondents to tell us whether they thought the business would become larger or smaller, more profitable or less so.**

A little more than half of respondents (about 52.7%) expected to have a more profitable business; of that 52.7%, slightly fewer (24%) saw a bigger business than saw a smaller one (28.7%).

Regardless of their outlook, respondents were very passionate about the future of the publishing business. Most indicated that the future of the industry hinges on an ability to adapt to and keep up with digital change.

- "A lot depends upon getting up to speed with the changes that are taking place."
- "I also think that the larger business will only come to those who embrace change."
- "As long as the evolution of the business model is dictated by technology developed outside of the industry, the cost of adapting to the rapidly changing technology

landscape while maintaining traditional practices will become prohibitive but for a few innovators.”

- “I'd like to think that we are flexible enough to evolve and change our industry's future so it continues to be prosperous and profitable.”
- “The opportunity is to grow if the response to changes works. If they do not, then it will be smaller.”

I'm not surprised to see a lot of uncertainty. Respondents questioned what will happen to the book business or whether there will be a “book” business at all.

- “The scary thing about all of this is that we don't know what we don't know. Currently we are seeing a lot of growth in digital publishing, and our printed materials are also up, but what will the future hold? Will we see a decline in printed book sales? Will ebooks fizzle?”
- “The evolution of the idea of what a book can be — maybe it's printed, maybe online, maybe a little of both — will fundamentally change the industry, but will result in some growth.”
- “The so-called ‘book business’ in the digital age is just not a useful category, as it encompasses a number of unrelated content publishing industries who have been traditionally unified by a common medium and supply chain. As this content migrates to a digital platform, the means with which it is presented to consumers will diverge. Educational and academic publishers will have even less in common with consumer publishers than they do today. Trade publishing will make even less sense as a category than it does now. Some kinds of content publishing will grow in terms of profitability and scale, while others will diminish, or simply become the purview of other kinds of firms with other specialties.”

Several respondents also predicted a decline of the larger houses but growth in self-publishing and micro-presses. With the continued growth of self-publishing services from such players as Author Solutions, Lulu and Smashwords, and help for self-publishers from established players like Bookmasters, Thomas Nelson and Harlequin, this prediction seems well on its way to being realized.

While responses varied, there is one thing everyone can agree on: “We will surely be different than we are today.”

**14. Finally, respondents were presented with a list of current buzzwords to find out what they see as old hat, fads, or long-term trends. (This material was so interesting and extensive that it's in full at the back of this paper, in Table 1 on page 12.)**

I was struck by the expectation of 62% of respondents that Twitter is a “fad, soon to pass.” “Free as a price point” is seen that way by 38% of respondents; 28% have that expectation for “crowd sourcing.”

Since Twitter is often seen (today) as an essential component of social network marketing, it was a bit surprising to see so many people dismiss its future relevance. One comment suggested that perhaps people see the Twitter platform itself as a fad but recognize that it is just the current iteration of what will be a long-term trend. The scepticism about “free as a price point” may reflect an industry recoiling from the idea of giving away content when it is trying to foster a perception of value for it.

I’ll go out on a limb and say that the 28% who think “crowd sourcing” is a fad are wrong. I expect to see more crowd-sourced content, editing, curation and recommendation for a long time to come.

What the respondents chose from the list of buzzwords as the most likely “long term trends” were collaboration (73%), communities (77%), digital marketing (86%), enhanced ebooks (74%), experimentation (78%), metadata (77%), metrics (78%), publishing in vertical niches (78%) and SEO (74%), as well as social media (75%), web analytics (79%), customer-centric (72%) and cloud-based computing (71%).

Other long-term trends that respondents identified in their comments include: self-publishing, print on demand, mobile platforms, geolocation, chunking, peer/social influencers and transmedia. Additional concepts identified as “yesterday’s news” include “out of print” and “dedicated e-readers.”



**Table 1: Responses to Industry Buzzwords Question**

Please mark whether you feel the following concepts are either: yesterday's news, part of a current fad that will soon pass, or represent the start of a meaningful, long term trend that most people in publishing need to understand.

Answer Options	Total Respondents	Yesterday's news	Fad, soon to pass	Long term trend	Never heard of this
Aggregation	131	14.5%	2.3%	58.0%	25.2%
Author Platforms	133	12.8%	13.5%	63.9%	9.8%
Blogosphere	134	14.2%	15.7%	67.2%	3.0%
Cloud-based computing	130	6.2%	13.8%	70.8%	9.2%
Collaboration	131	9.9%	9.2%	73.3%	7.6%
Communities	131	9.9%	9.2%	77.1%	3.8%
Cross-functional management	132	8.3%	12.1%	50.0%	29.5%
Crowd-sourcing	130	7.7%	27.7%	30.8%	33.8%
Curation	129	2.3%	8.5%	41.1%	48.1%
Customer-centric	127	11.8%	7.9%	71.7%	8.7%
Digital Marketing	133	11.3%	2.3%	85.7%	0.8%
Digital Strategy	130	7.7%	3.8%	85.4%	3.1%
Enhanced eBooks	133	3.8%	21.1%	74.4%	0.8%
Free as a price point	132	20.5%	37.9%	31.8%	9.8%
Going Viral	131	32.8%	10.7%	49.6%	6.9%
Long Tail	128	25.0%	7.0%	50.8%	17.2%
Metadata	131	13.0%	3.1%	77.1%	6.9%
Metrics	124	7.3%	2.4%	78.2%	12.1%
Publishing in vertical niches	130	3.8%	10.0%	77.7%	8.5%
Reader-generated content	131	6.1%	35.9%	54.2%	3.8%
Rich media for book marketing	128	6.3%	17.2%	62.5%	14.1%
Search-engine marketing	131	13.7%	8.4%	67.9%	9.9%
Search-engine optimization	130	15.4%	5.4%	73.8%	5.4%
Single-source publishing	122	13.9%	9.0%	42.6%	34.4%
Social media	134	9.0%	13.4%	75.4%	2.2%
Taxonomies	128	9.4%	5.5%	40.6%	44.5%
The Big 6	126	27.0%	15.9%	14.3%	42.9%
Tipping Points	123	17.1%	21.1%	45.5%	16.3%
Twitter	132	9.8%	61.4%	28.8%	0.0%
Web 2.0	127	36.2%	23.6%	29.9%	10.2%
Web 3.0	124	6.5%	25.8%	47.6%	20.2%
Web analytics	127	5.5%	3.1%	78.7%	12.6%
XML workflow	129	10.1%	7.0%	67.4%	15.5%

## Quantitative Survey Results

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Survey results are given here, for all questions that could be quantified; open-ended responses in which we asked for respondents' comments are not included.

<b>What is your primary job function within the company you work for?</b>		
<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
General Management	26.0%	46
Other (please specify)	24.3%	43
Editorial	12.4%	22
Marketing	12.4%	22
Sales	10.2%	18
Information Technology	7.3%	13
Production	6.2%	11
Manufacturing	1.1%	2
	<b><i>answered question</i></b>	<b>177</b>
	<b><i>skipped question</i></b>	<b>1</b>

<b>Are you?...</b>		
<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Senior Management	40.7%	72
Mid Level	36.2%	64
Director Level	17.5%	31
Entry Level	5.6%	10
	<b><i>answered question</i></b>	<b>177</b>
	<b><i>skipped question</i></b>	<b>1</b>

<b>What kind of books do you (personally) primarily work with (Check all that apply.)</b>		
<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Adult trade and consumer books for general audiences	66.1%	117
Academic or scholarly works	33.3%	59
Juvenile trade and consumer books for children and YA	22.0%	39
Professional books for technical, scientific, legal, business and medical audiences	22.0%	39
College textbooks, instructional and advanced placement materials	17.5%	31
Religious books including bibles and prayer books	14.7%	26
Other (please specify)	14.7%	26
Elementary and high school textbooks, workbooks or supplements	8.5%	15
<b>answered question</b>		<b>177</b>
<b>skipped question</b>		<b>1</b>

<b>How big is the company you work for?</b>		
<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
100+ employees	42.9%	76
Fewer than 10 employees	35.0%	62
10-99 employees	22.0%	39
<b>answered question</b>		<b>177</b>
<b>skipped question</b>		<b>1</b>

<b>Which best describes the primary business of the company you work for?</b>		
<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Publisher	55.4%	98
Other (please specify)	10.7%	19
Service Provider	6.8%	12
Consulting Firm	5.6%	10
Distributor/Wholesaler	5.6%	10
Non-Profit	5.6%	10
Library	5.6%	10
Printer/Manufacturer	2.3%	4
Retailer	1.1%	2
Trade Association	1.1%	2
Research Firm	0.0%	0
<b>answered question</b>		<b>177</b>
<b>skipped question</b>		<b>1</b>

**Selected Results from 2010 BISG Making Information Pay Survey**

by Mike Shatzkin. © 2010 Book Industry Study Group

**When do you think the use of new technologies will affect your functional area (i.e., editorial, marketing, distribution, etc.) to such an extent that you'd be comfortable saying your job has "fundamentally changed"?**

Answer Options	Response Percent	Response Count
Happening now	44.8%	43
Already happened	31.3%	30
Happening soon (next 1.5-2 years)	17.7%	17
Not happening for a while (next 3-5 years)	3.1%	3
Not for a long time (more than 5 years from now)	3.1%	3
Never happening	0.0%	0
I don't know	0.0%	0
	<b>answered question</b>	<b>96</b>
	<b>skipped question</b>	<b>82</b>

**If you answered any time from "already happened" to "within the next 5 years" above, what do you think are the primary reasons driving this change? (Check all that apply.)**

Answer Options	Response Percent	Response Count
New tools and technologies	90.6%	87
New product opportunities	62.5%	60
New customer requirements	61.5%	59
New marketing opportunities	58.3%	56
Pressures to cut costs	55.2%	53
Pressures to increase revenues or margin	41.7%	40
Other (please specify)	5.2%	5
	<b>answered question</b>	<b>96</b>
	<b>skipped question</b>	<b>82</b>

**Do you foresee a fundamental reorganization of the workflow in your functional area (i.e., editorial, marketing, sales, etc.) within the next two years?**

Answer Options	Response Percent	Response Count
Yes	70.8%	68
No	29.2%	28
	<b>answered question</b>	<b>96</b>
	<b>skipped question</b>	<b>82</b>

<b>Within your functional area (i.e., editorial, marketing, sales, etc.), do you feel that change mostly means more jobs or fewer jobs?</b>		
<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
I don't know	53.1%	51
Fewer jobs	24.0%	23
More jobs	22.9%	22
<b>answered question</b>		<b>96</b>
<b>skipped question</b>		<b>82</b>

<b>Do you think your current personal skill set matches the industry's future needs in your functional area (i.e., editorial, marketing, sales, etc.)?</b>		
<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Yes	61.5%	59
No	19.8%	19
I don't know	18.8%	18
<b>answered question</b>		<b>96</b>
<b>skipped question</b>		<b>82</b>

<b>What response(s) has your company taken to address changes in your functional area (i.e., marketing, editorial, sales, etc.)? (Check all that apply.)</b>		
<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Putting in new systems and using new tools	79.6%	74
Shifting the way budgets are allocated	43.0%	40
Changing daily work practices	43.0%	40
Teaching new employee skills	36.6%	34
Other (please specify)	14.0%	13
<b>answered question</b>		<b>93</b>
<b>skipped question</b>		<b>85</b>

<b>As opposed to the actual response(s) dictated above, what do you think would be the best response for companies like yours to address the changes in your functional area?</b>		
<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Same as above — my company is taking the correct actions	48.4%	45
Learning new skills	48.4%	45
Put in new systems and use new tools	36.6%	34
Changing daily work practices	30.1%	28
Shift the way budgets are allocated	20.4%	19
Other (please specify)	7.5%	7
<b>answered question</b>		<b>93</b>
<b>skipped question</b>		<b>85</b>

**Selected Results from 2010 BISG Making Information Pay Survey**

by Mike Shatzkin. © 2010 Book Industry Study Group

Can you identify specific new processes, practices or methods that have recently been instituted by your company in response to new technologies?		
Answer Options	Response Percent	Response Count
Yes (please specify)	60.2%	56
No	39.8%	37
<i>answered question</i>		<b>93</b>
<i>skipped question</i>		<b>85</b>

Is there a particular benchmark or "point of no return" indicator you're watching for in your company or your functional area?		
Answer Options	Response Percent	Response Count
No	74.2%	69
Yes (please specify)	25.8%	24
<i>answered question</i>		<b>93</b>
<i>skipped question</i>		<b>85</b>

Do you believe that new digital technologies (in all their forms) are fundamentally changing the following publishing functions?				
Answer Options	No	Yes	I don't know	Response Count
Distribution	5	138	7	150
Marketing	13	133	3	149
Production	7	133	8	148
Information Technology	10	129	10	149
Manufacturing	10	122	17	149
Sales	10	121	16	147
Editorial	42	88	19	149
<i>answered question</i>				<b>150</b>
<i>skipped question</i>				<b>28</b>

**When do you think these changes will reach a "point of no return", i.e., when traditional practices must yield to new practices driven by new technologies?**

Answer Options	Already happened	Happening now	Happening soon (next 1 1/2-2 years)	Not happening for awhile (next 3-5 years)	Not happening for a long time (more than 5 years)	Never happening	I don't know	Total
Distribution	14	77	31	12	4	0	10	148
Production	20	71	34	11	2	1	9	148
Editorial	15	43	34	17	9	7	22	147
Information Technology	32	81	9	5	4	0	16	147
Manufacturing	20	61	34	12	3	0	17	147
Marketing	24	82	30	3	2	1	5	147
Sales	14	66	34	10	4	1	15	144
<b>answered question</b>								<b>150</b>
<b>skipped question</b>								<b>28</b>

**Thinking several years down the road, what do you think will be the ultimate effect of new technologies on the book business?**

Answer Options	Response Percent	Response Count
We will have a smaller more profitable business	28.7%	43
I don't know	26.0%	39
We will have a larger, more profitable business	24.0%	36
We will have a smaller less profitable business	10.0%	15
We will have a larger, less profitable business	6.7%	10
We will maintain our business at the current rate	4.7%	7
<b>answered question</b>		<b>150</b>
<b>skipped question</b>		<b>28</b>

## Demographics

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A total of 177 people responded to this survey. While respondents come from across the industry — from consulting firms, distributors, printers and manufacturers, retailers, libraries, agencies, associations and service providers — the majority (55%) work in a publishing house.

Over 40% of respondents work at the senior management level in their companies. Eighteen percent work at the director level, 36% are mid-level and 6% are entry-level employees. Company size varied from fewer than 10 employees (35%) to more than 100 (43%).

Respondents work in all defined functional work areas: management, editorial, marketing, production, sales, manufacturing and information technology. Of the 98 respondents who work for a publisher, a quarter work in general management. Another 15% come from marketing, 13% from editorial, 12% from sales, 10% from production and 6% from IT. Nearly 70% of those in publishing houses work with adult trade and consumer books.