

Campus eBookstore - an Industry-Wide Solution for Digital Course Materials



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***“Businesses that don't invest
in the future,
tend to not do well there.”***

Adapted from Thomas Friedman
The World Is Flat

What is an eBook?



- **Static eBook**
usually a PDF of an existing print textbook
- **Dynamic “eBook”**
modular interactive learning

Where Is Digital Content Going?

“Can we stop using the word ‘book’ – ebook, textbook, book. Because it has nothing to do with the future of this company.”

~ Publisher CEO

Four Aspects of Learning

Lecture

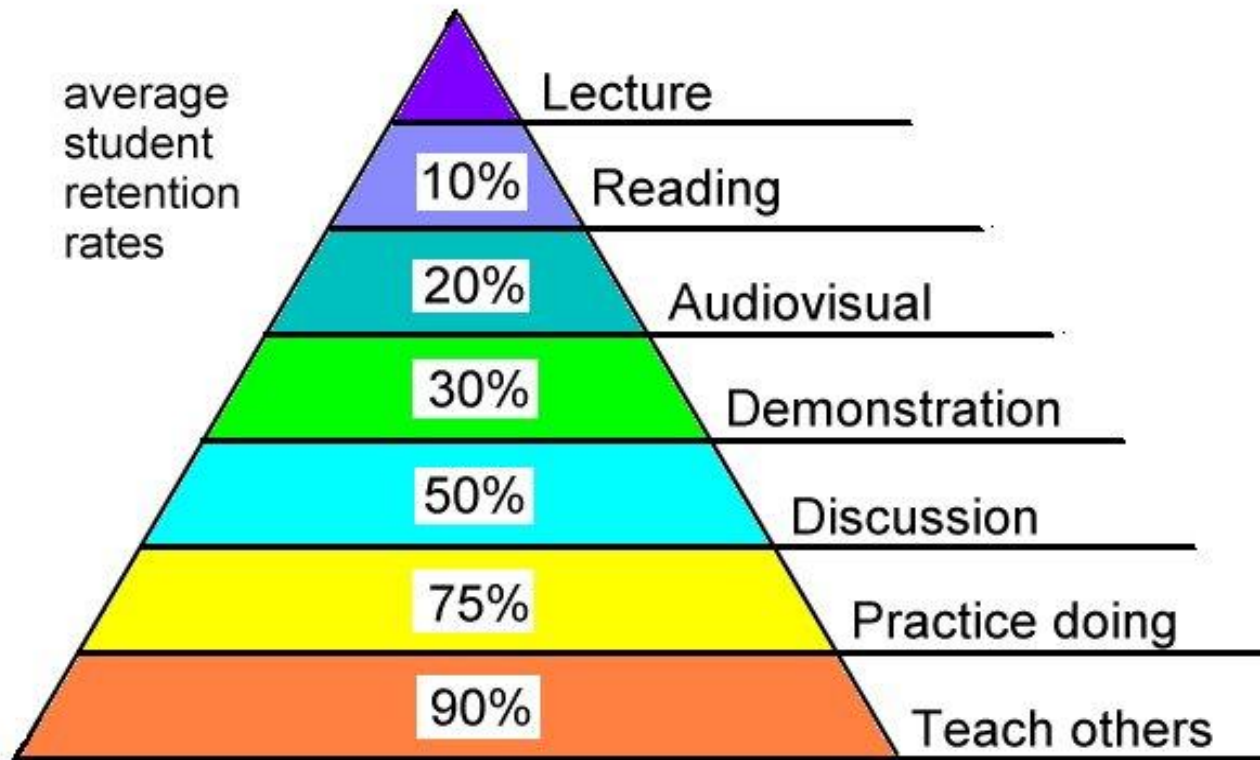
Course
Materials
(Textbook)

Studying

Testing

Fully Integrated Teaching and Learning Solution

Learning Pyramid



Source: National Training Laboratories, Bethel, Maine

Fully Integrated Teaching and Learning Solution



Digital Impact – Examples



Digital Impact – Examples

- **Photography** – film, analog cameras, photo finishing...
- **Music** – record stores, analog stereo equipment...
- **Travel** – travel agencies...
- **Telecommunications** – pay phones, land lines...
- **Advertising** – newspapers...
- **Video** – video stores, DVDs...
- **Literature** – hard copy books, bookstores...
- ***Course Materials...***

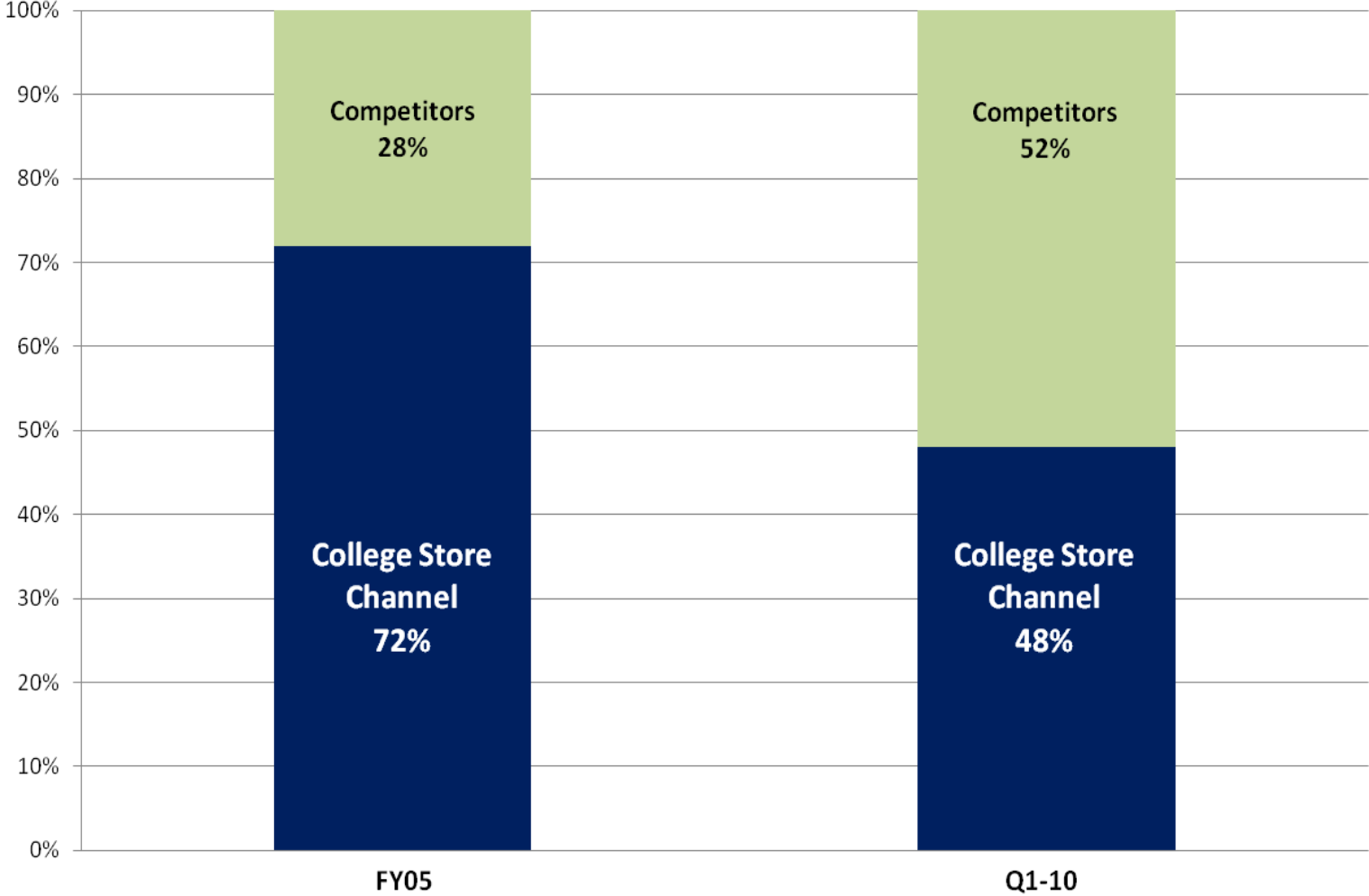
What Is Channel Collapse?

It's the Channel, Not the Store

The future viability of the channel requires the success of the channel as a whole, not the success of any individual store, or group of stores.

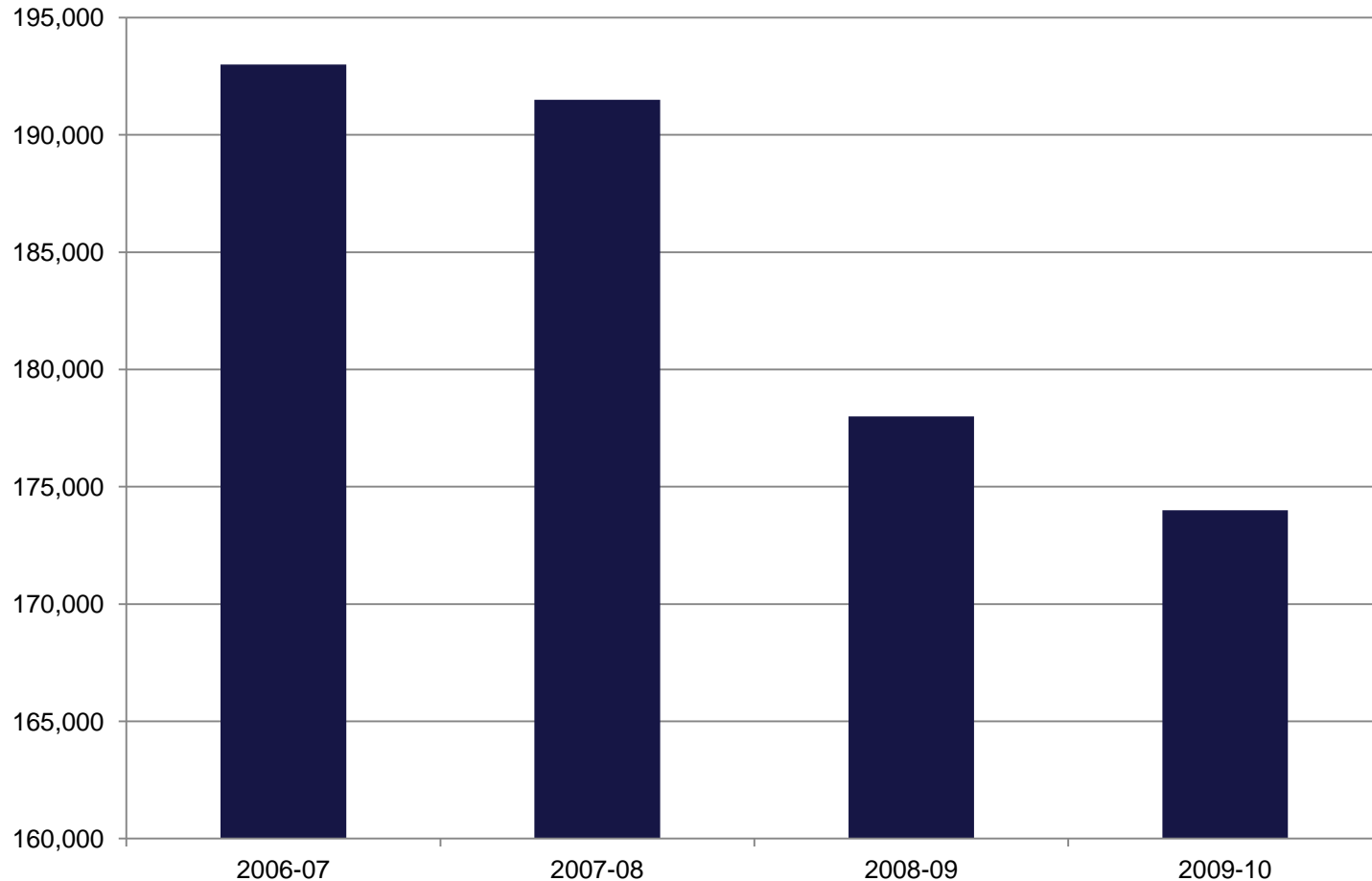
Without channel success, stores fail.

% of Books Purchased from College Stores



Source: Student Monitor Lifestyle & Media Spring 2010 Report

Coursebook Unit Sales



Source: ICBA

The Future Is About
Maintaining...

Market Share
Margins

The Future Is About Maintaining...



Market Share

***“Rental is a battle
ground for market
share.”***

No battle plan survives contact with the enemy.

~ Colin Powell

***“Digital is the next
battle ground for
market share.”***

The future is already here — it's just not evenly distributed.

~ William Gibson, Science Fiction Writer

Coined the word “cyberspace”

Where Is the Market Going?

“...Web queries for 'Kindle textbooks' are up 60 percent from this time last year. Same goes for 'Nook textbooks.' Searches for 'iPad textbooks' are up 40 percent. Whether or not students are buying e-textbooks this year, they seem to be shopping for them.”

~ Google

“Kno’s eTextbooks Is Top Back-To-School iPad App With One Download Every 8 Seconds”

~ Tech Crunch

(Aug. 20, 2011)

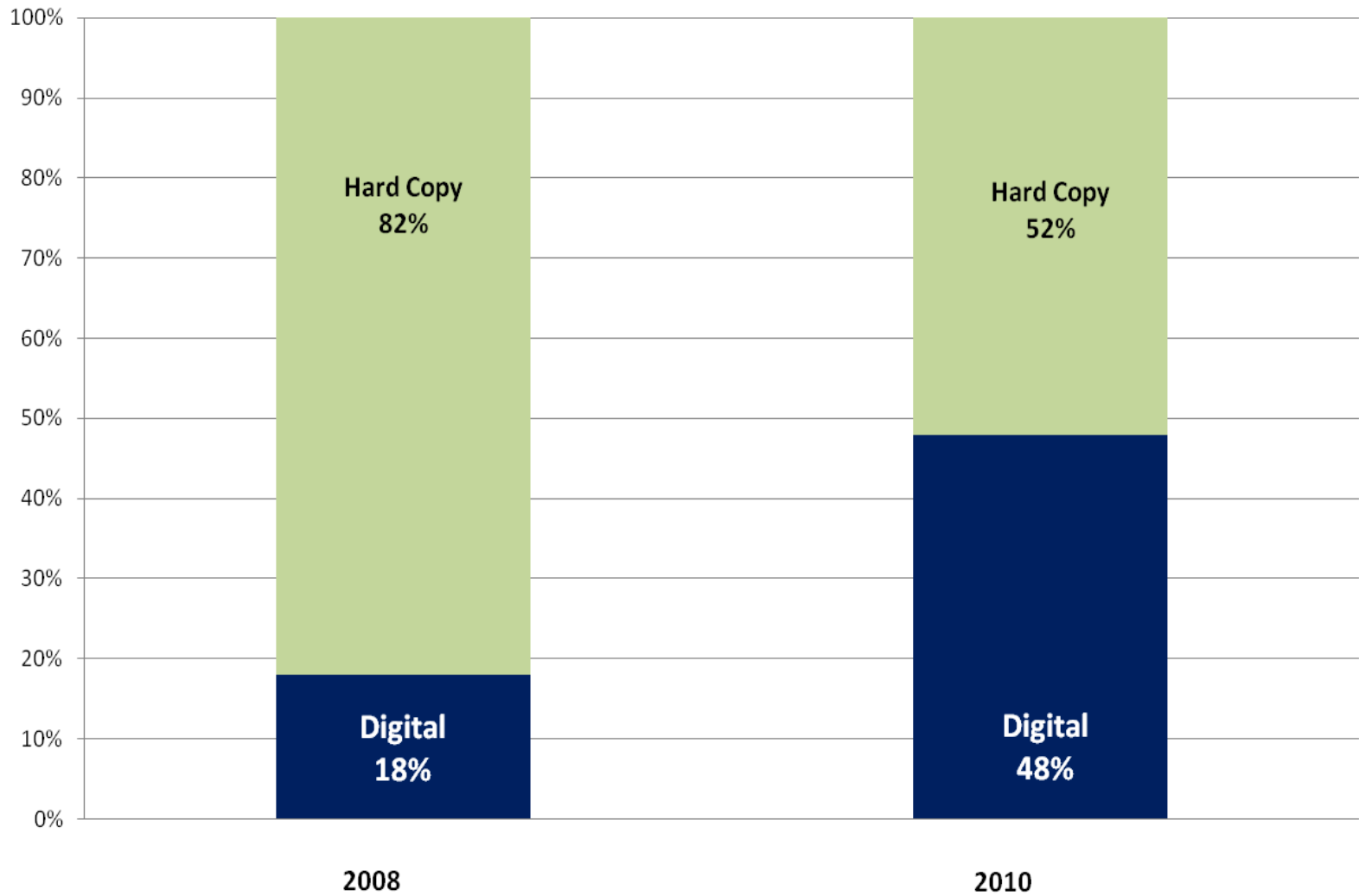


Fall 2010

**27% of Students Were
Required to Purchase a
Textbook with an Access
Code**

Source: Follett Higher Education Group

Percent of Students Who Have Purchased or Accessed Digital Textbooks



Source: NACS Student Watch

Why Are Digital Sales Growing Outside of College Stores?

“...In all of our businesses, we are experiencing growth in sales of digital content...”

~ Publisher Annual Stockholder Report

Challenges of Distributing Through College Stores

College Stores

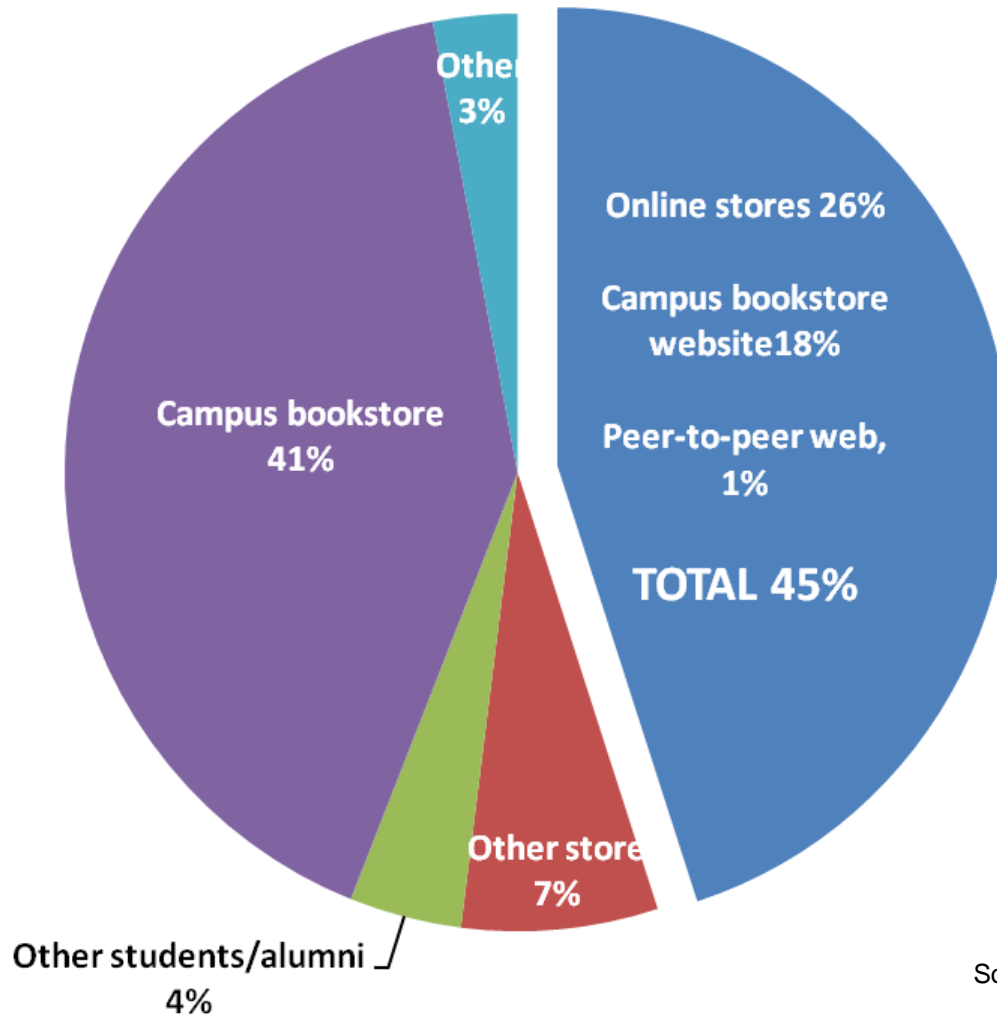
- Unable to provide customer technical support
- Hit and miss ecommerce
- Lack of technical know-how

Publishers

- Large number of stores
- Billing and collections logistics
- No standards for data interchange

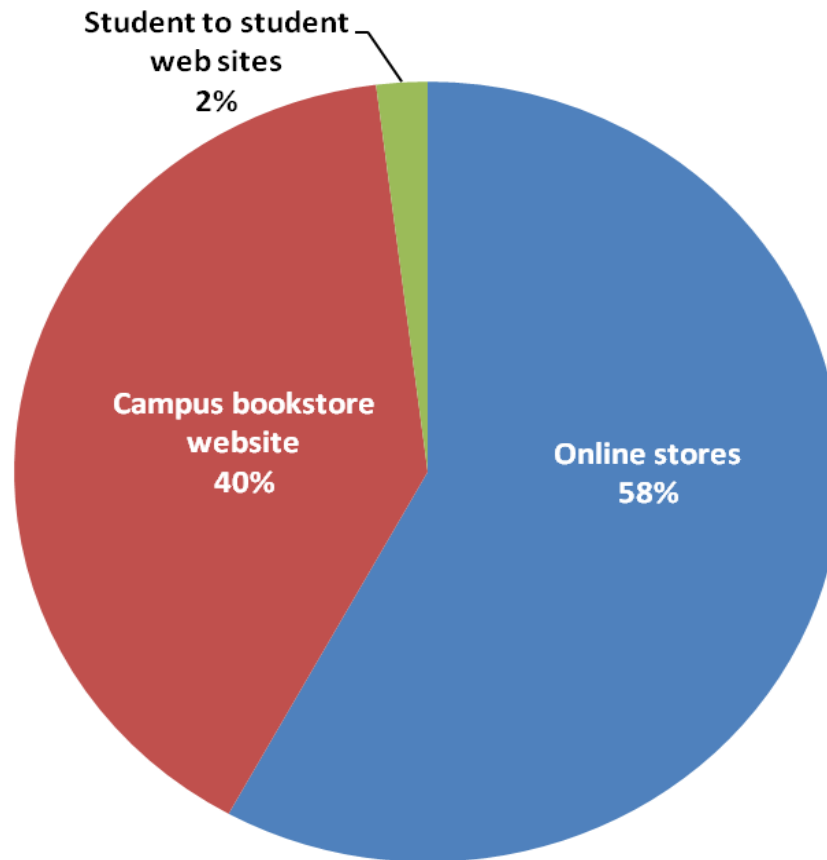


45% of textbook units sold online in 2009



Source: NACS Student Watch 2010

60% of online sales were not from college store websites

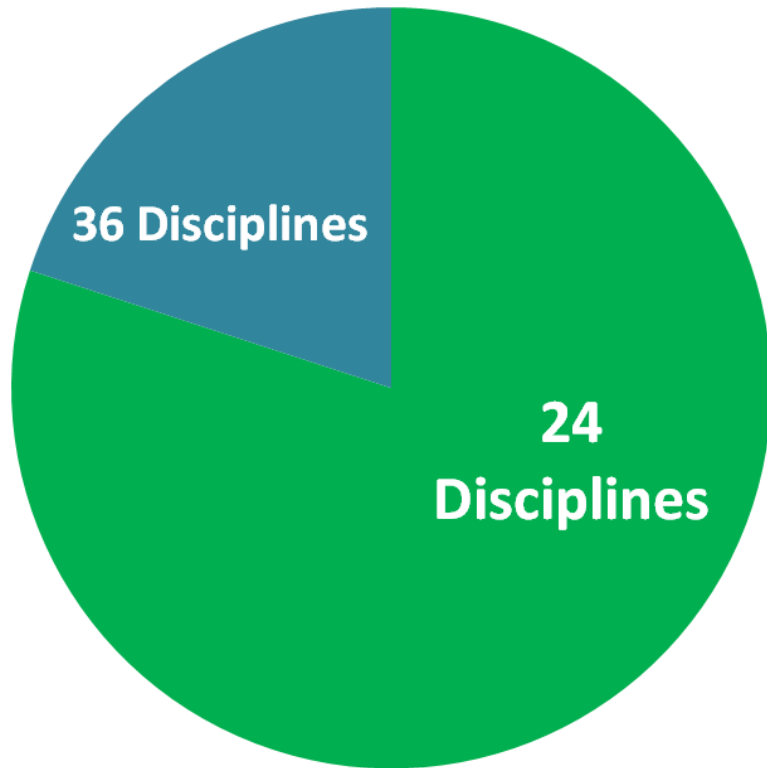


NACS Student Watch 2010

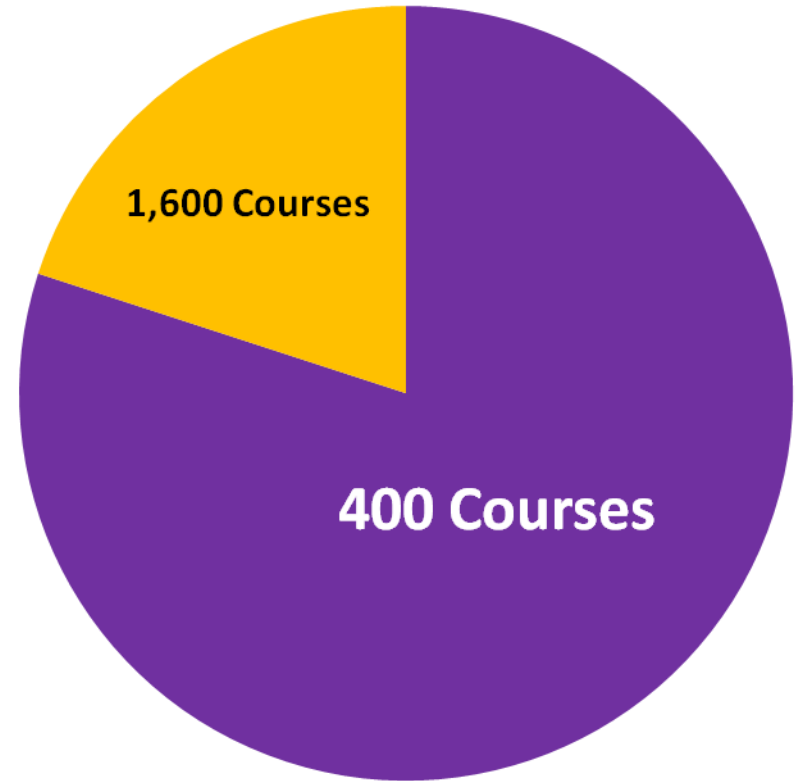
The Competitive Target



**80% of Revenues
from 40% of Disciplines**
60 most common disciplines



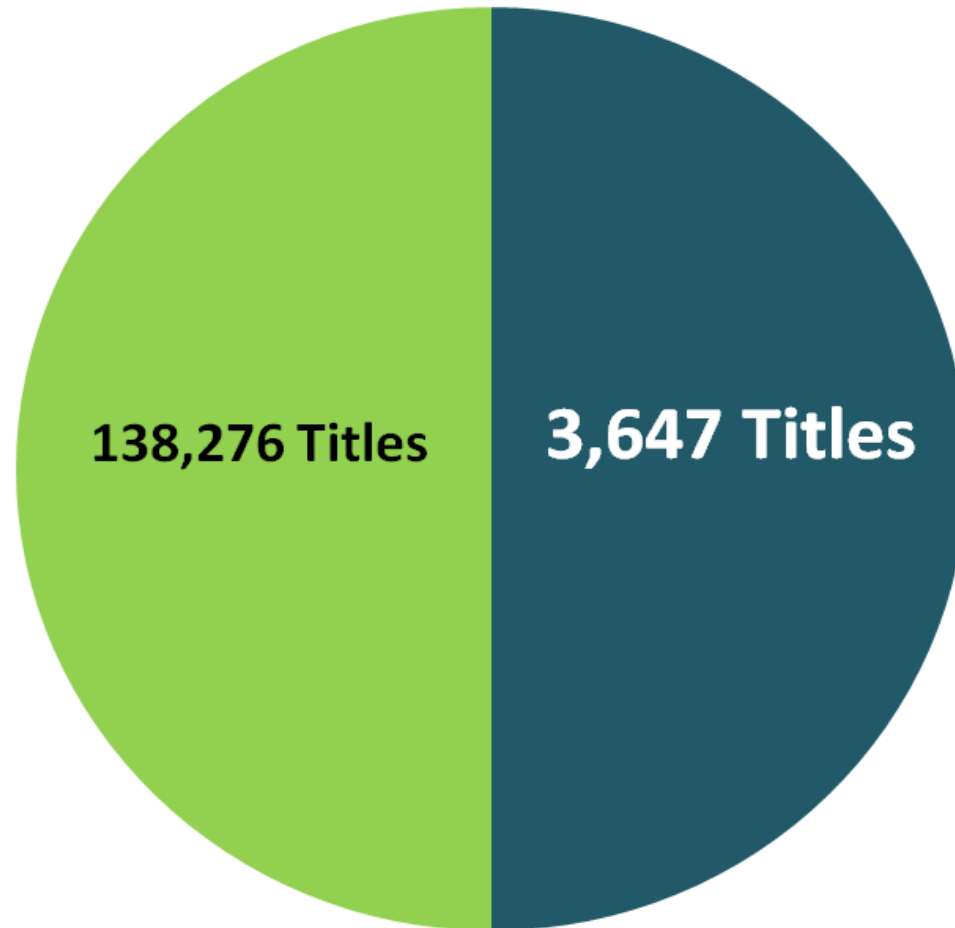
Source: McGraw Hill



**80% of Revenues
from 20% of Courses**
2,000 most common courses

50% of Revenues from 2.6% of Titles

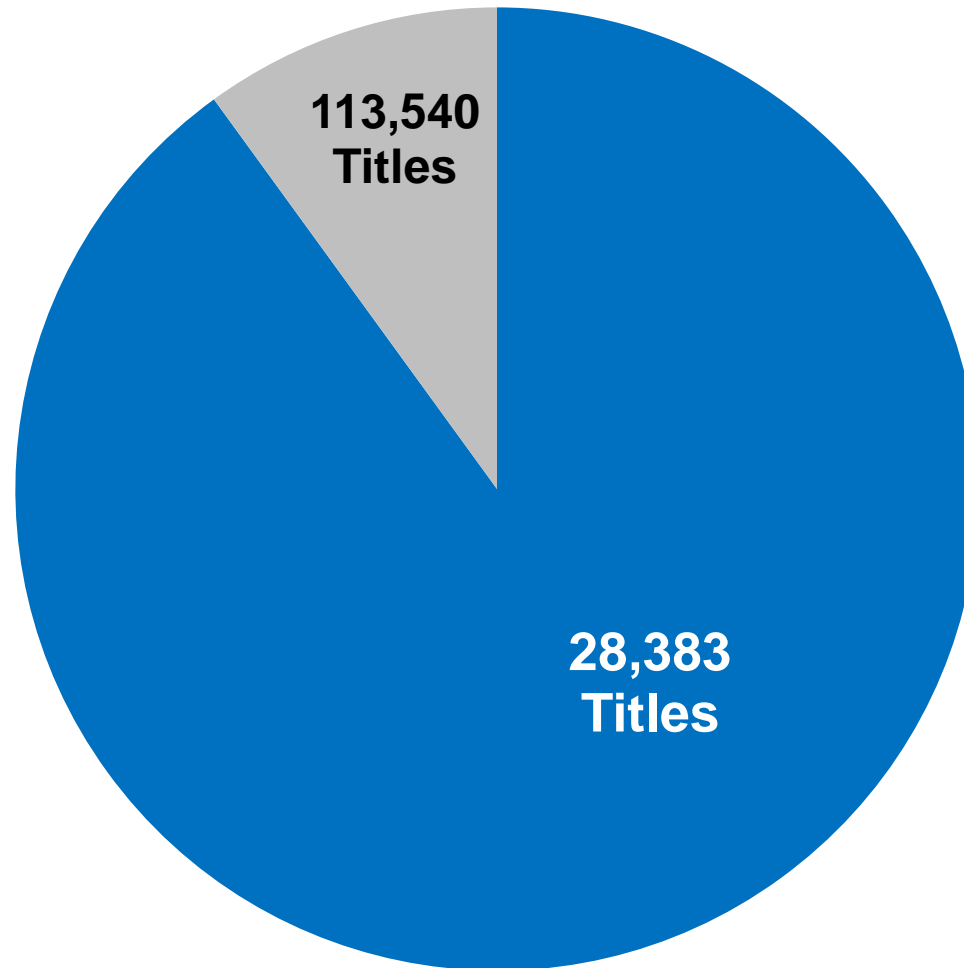
141,923 titles sold Fall 2010



Source: Wholesale Data Bases

90% of Revenues from 20% of Titles

141,923 titles sold Fall 2010



Source: Wholesale Data Bases

Requirements For Success



- Change faster
- Learn faster
- Act faster

A Coalition of Business-based College Store Organizations, Owned and Controlled by Independent College Stores



Independent College
Bookstore Association



**Canadian Campus
Retail Associates**



What Must Be Done?

- ✓ **Prevent Channel Collapse**

 - Maintain Market Share*

 - Remain Relevant*

- ✓ **The Future of the Channel Is Digital**

 - Credible & Capable*

 - Online Transactions*

- ✓ **Innovate With New Business Process**

 - Meaningful Commercial Collaboration*

What Must Be Done?



DON'T BE
AFRAID OF CHANGE.

The way
business is
done is
changing – it's
called
innovation.

Requirements to Innovate

Demonstrate -

1. A recognized need
2. Competent people with relevant technology
3. Financial support

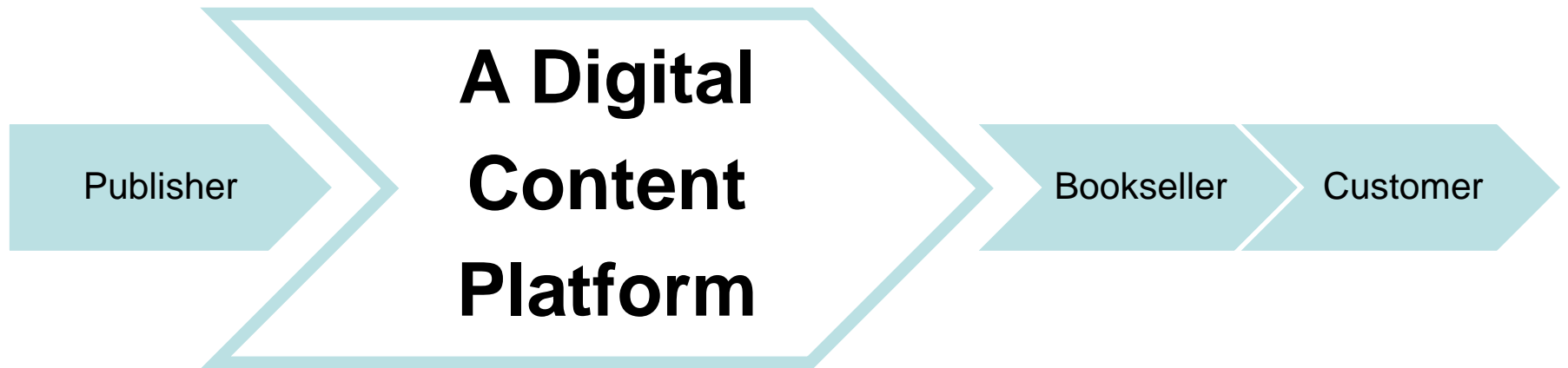
1. A Recognized Need

The college store channel must demonstrate we are capable and credible players in the online distribution of digital course materials.

2. Competent People...

- College stores are the established retail channel leader in course material distribution, with a sustainable competitive trust advantage.
- The intrinsic trust, professional ability, and integrity of independent college stores is a key differentiator in the online world of ecommerce.

2. ...with Relevant Technology



3. Financial Support

Meaningful Commercial Collaboration



An Industry Wide Solution



Campus eBookstore

A Coalition of Business-based College Store Organizations, Owned and Controlled by Independent College Stores Exclusively



An Industry Wide Solution



A centralized marketplace where digital content can be bought and sold



Campus eBookstore

A Centralized Digital Content Marketplace

- Enables college stores to distribute digital content quickly, inexpensively and in a trustworthy way.
- Enables publishers to maximize the market potential of their digital content.





Campus
eBookstore

Principles

1. Controlled by independent college stores
2. Supports inclusion and distribution of faculty-authored content
3. The business model reflects the academic nature and timings of the collegiate retail marketplace
4. Offers favourable or emphasized terms for university presses and other smaller publishers
5. Scalable to make digital distribution possible for the broadest range of college stores



Solutions & Opportunities

Provides Booksellers

- Access to large repository of digital content
- Technology
- Integration Services
- Centralized Customer Support

Provides Publishers

- A fair and open marketplace
- Analytics and reporting
- Simplicity, Reliability, Credibility



Meeting Stakeholder Interests

Students

- Correct Course Material
- Convenience – One stop shopping

College Stores

- Convenience (Integration, Management)
- Support and Reliability

Publishers

- Market Access (Drive High Sell-Through)
- Low Support Costs



Campus eBookstore U.S. Pilots

- Anne Arundel Community College
- Auburn University
- Boise State University
- Bowling Green State University
- Broward College
- California State University Chico
- California State University Fullerton
- Carnegie Mellon
- Central Washington University
- Chemeketa Community College
- Davidson College
- Eastern Washington University
- Georgia Southern University
- Grinnell College
- Highline Community College
- Indian River State College
- Iowa State University
- Johnson County Community College
- Kutztown University
- Missouri University of Science and Technology
- Montana State University Bozeman
- New York University
- Normandale Community College
- North Carolina State University
- North Dakota State University
- Olympic College
- Oregon State University
- Palm Beach Atlantic University
- Portland State University
- Reed College
- San Diego State University
- San Francisco State University



Campus eBookstore U.S. Pilots

- Southern Illinois University
- Stark State College
- Swarthmore College
- Syracuse University
- Texas State University San Marcos
- University of Arizona
- University of California Los Angeles
- University of California Santa Cruz
- University of Colorado Boulder
- University of Illinois Champaign
- University of Iowa
- University of Kansas
- University of Minnesota
- University of Missouri Columbia
- University of Missouri Kansas City
- University of Missouri St. Louis
- University of Montana
- University of Puget Sound
- University of Southern California
- University of Tennessee
- University of Texas Austin
- University of Utah
- University of Washington
- University of Wisconsin Madison
- University of Wisconsin Milwaukee
- Valencia Community College
- Villanova University
- Virginia Tech
- Weber State University
- Western Carolina University
- Western Michigan University
- Western Washington University
- Whatcom Community College
- Wingate University



Invest in the Future Today...

- ✓ **Maintain the College Store Channel**

 - Maintain Market Share*

 - Remain Relevant*

- ✓ **Embrace Our Digital Future**

 - Credible & Capable*

 - Online Transactions*

- ✓ **Innovate With New Business Process**

 - Meaningful Commercial Collaboration*



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News

Tuesday November 1, 2011

Campus eBookstore launches Google eBooks at Canadian Academic Institutions

Campus eBookstore and its' affiliated college stores are thrilled to announce an agreement with Google eBooks to distribute eBooks in Canada, and soon in the United States.

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Commercial Content



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