

BIC Seminar: The Digital Supply Chain Today and Tomorrow

The role of data aggregators in the digital world

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Introduction

- The Marketplace
- Search and Discovery
- Marketing Material
- The Benefits of Aggregation
- Supply Chain and Information Chain Issues
- A Brief Word On Identifiers
- Key Metadata Elements

The Marketplace

- Scope: Ebooks, tradable chapters / fragments, audio downloads, online resources
- One vision
 - Disintermediated marketplace
 - Mega-aggregators offering pure aggregation without significant selection or qualification
 - Publishers selling direct
 - Authors selling direct
 - Handful of direct relationships between publishers and “retail” portals

Consumer has to forage for what they want



Sometimes they'll get lucky



Sometimes they'll be disappointed



The Marketplace

- Alternative vision
 - Mixed marketplace: ultimate shape / dominant players uncertain
 - Multiple channels
 - Publishers selling direct and via a range of intermediaries
 - Specialist services providing tailored selection and filtering
 - Addresses compelling consumer need for aggregation, selection and qualification

Search and Discovery: Principles

- Customers want to find **all** versions of a title in one place
 - print and digital
 - all digital formats
 - all sources of availability
- Accurate, up-to-date and rich data sells books
- The bar is higher than ever for rich data
 - multiple images
 - descriptions, contents
 - reviews
 - full text
 - many agencies to help with this

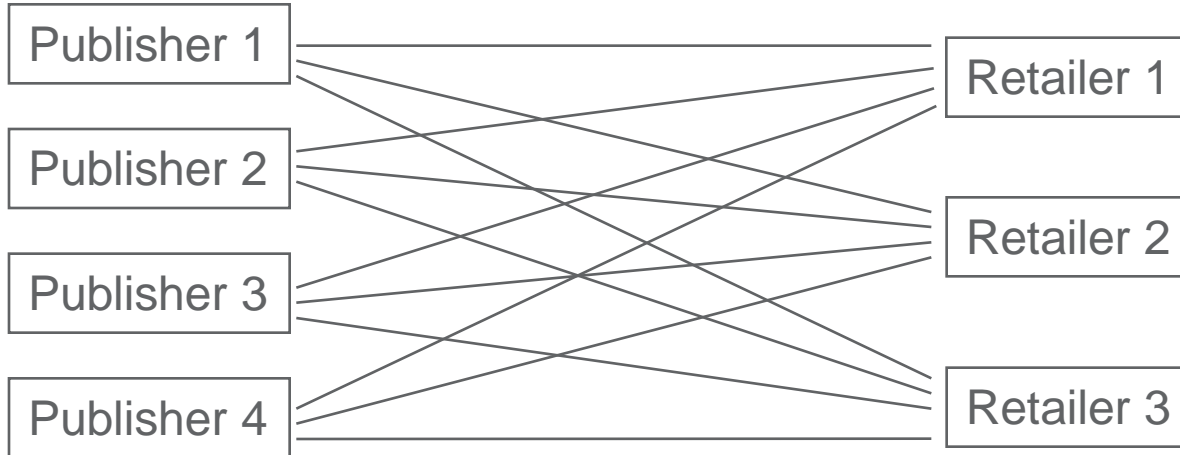
Search and Discovery: Principles

- Send appropriate metadata to appropriate aggregators
- Customers and potential partners can find information in the tools they use as part of their regular workflow practices
- Context of content is paramount
 - ~~Content + Context~~ Content^{Context}
- Maximise re-use of content
 - Content created for one audience may have value for others
- Distribution and Dissemination of Content is crucial
 - It's not enough just to create it
- Models suitable for small-scale experiments not necessarily suitable for wider-scale operations

Digital Marketing Material

- Digital Content crucial for promotion of both physical and digital products
 - Author interviews / commentaries
 - Samples: text / audio
 - Video content
- Digital Content for marketing is not about ebooks – it's about books
- Dissemination crucial
- Aggregation services essential

Digital Marketing Material

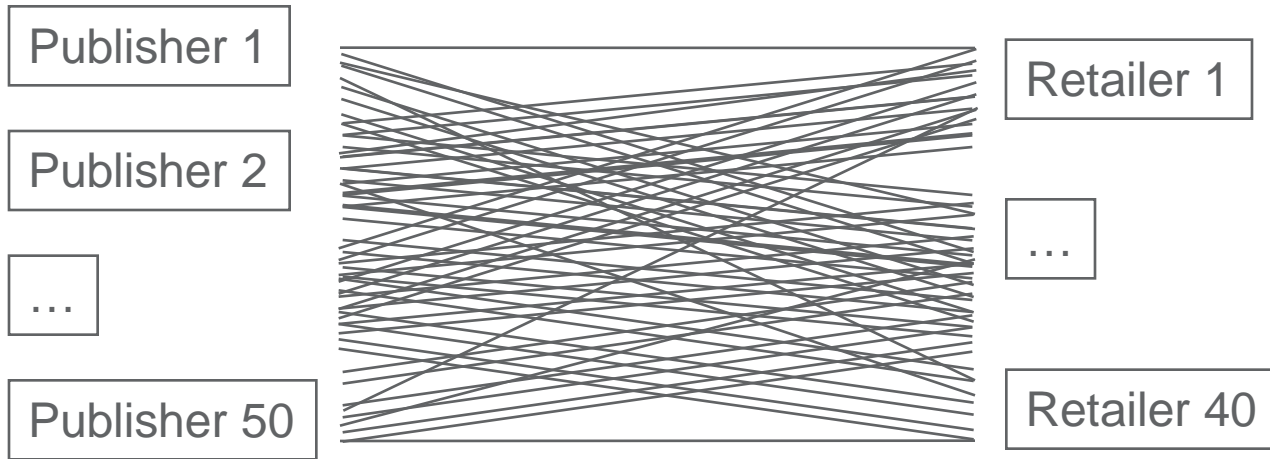


4 organisations each maintaining 3 relationships

3 organisations each maintaining 4 relationships

12 relationships with 24 end-points

Digital Marketing Material

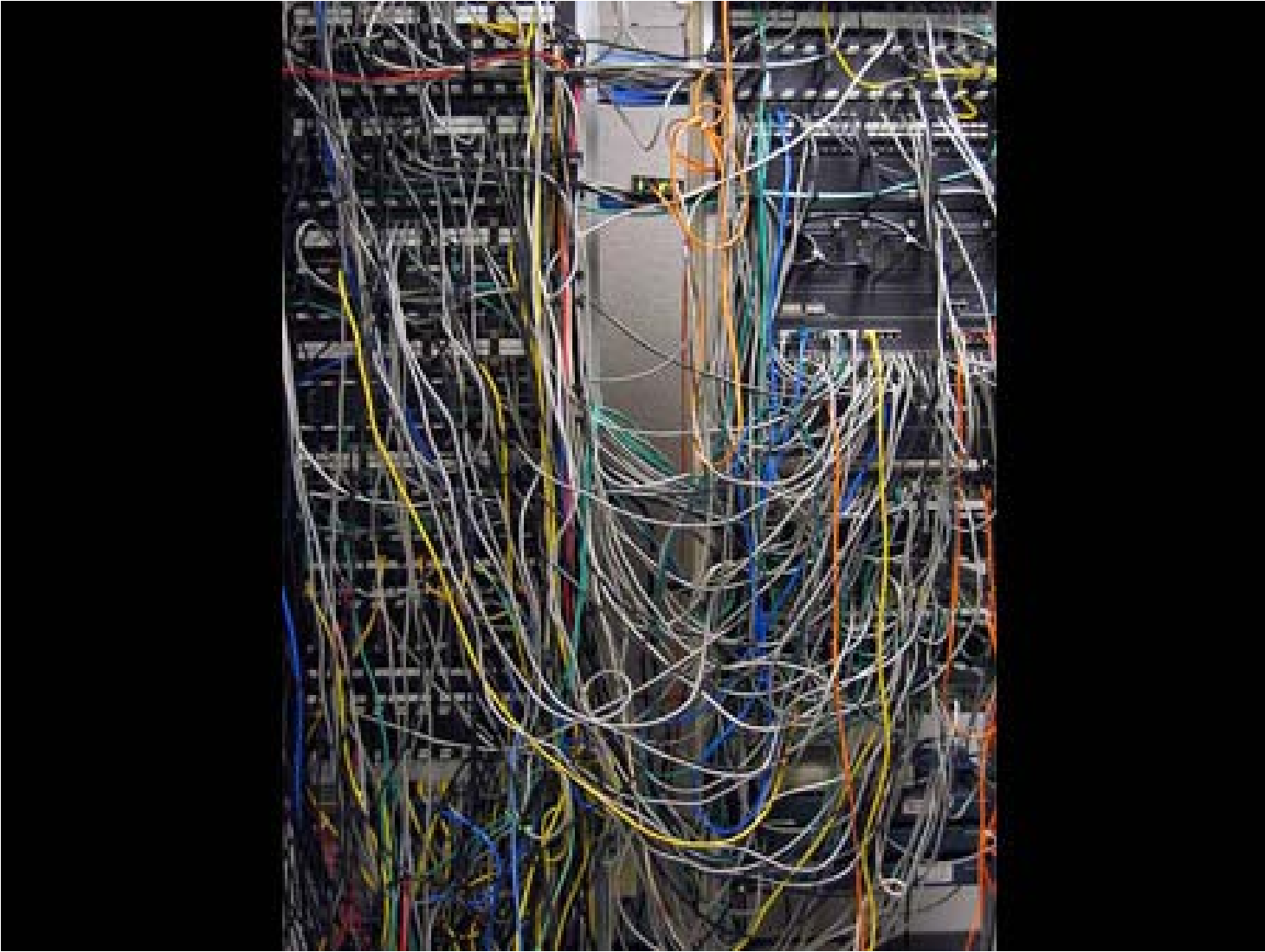


50 organisations each maintaining 40 relationships

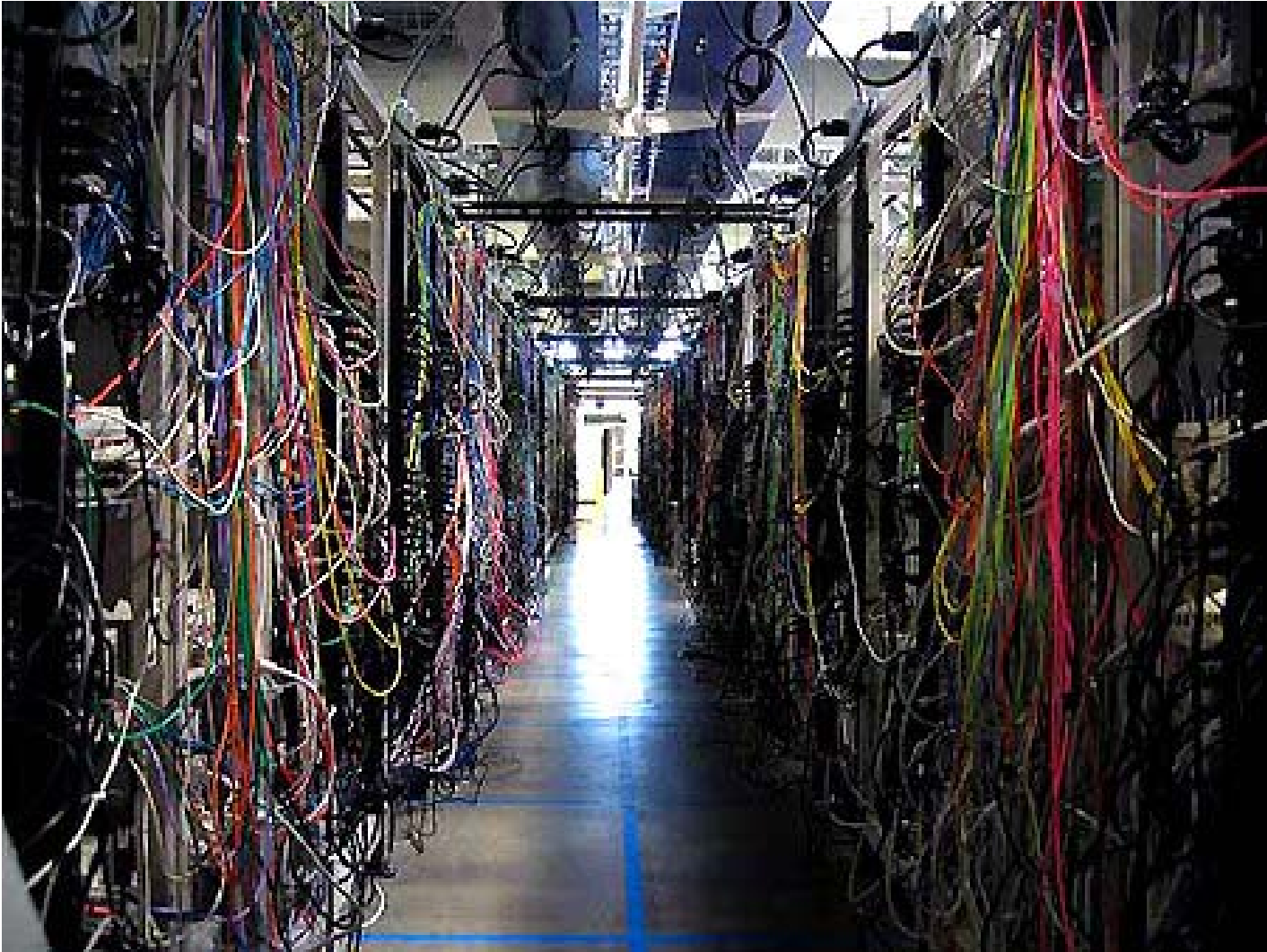
40 organisations each maintaining 50 relationships

2000 relationships with 4000 end-points

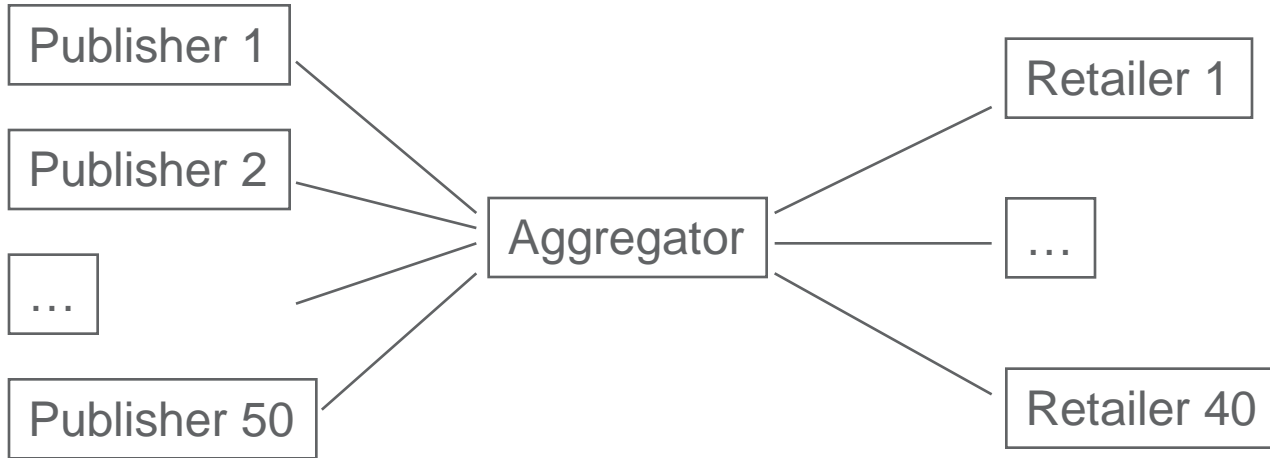
Digital Marketing Material



Digital Marketing Material



Digital Marketing Material



50 organisations each maintaining 1 relationship

40 organisations each maintaining 1 relationship

90 relationships with 92 end-points

Digital Marketing Material

- Publishers maintain data and links on aggregator databases
- Aggregators make available in specialist tailored tools
- Booksellers, libraries and others use the material
 - in their own marketing and promotion activity eg email promotions
 - on their own websites and online catalogues
- Content is expensive to generate: make the widest possible use of it

The Benefits of Aggregation

- Enabling **Publishers** to distribute and manage their digital product information in the marketplace.
- Enabling **Booksellers** to identify the digital products they should be selling; and to market those titles as effectively as possible
- Enabling **Libraries** to identify digital resources for acquisition; providing comprehensive reference services and definitive digital product information to populate and enrich catalogues

Supply chain Issues

- *Data* Aggregators and *Content* Aggregators
- Clearer representation of roles and product attributes
 - ‘Aggregators’, ‘Intermediaries’, ‘Re-sellers’, Digital Distributors...
 - ‘Open’ and ‘Restricted’ sales channels
 - Supplier Role proposed changes
 - Usage constraints
- Realignment of ONIX standard
 - Release 3.0 timing
 - Deployment implications
- Proprietary identifiers and metadata

Identification

- International ISBN Agency policy
- Each separately tradable product requires separate, unambiguous product identification by separate ISBN
- ‘Master’/generic ‘E-books’ are *not* tradable products
 - Not appropriate for inclusion in Product Database
- Consistent use of the same ISBN for the same product
- No ‘re-use’ of physical product ISBNs for digital product
- Publishers are best-placed to assign ISBNs
- Third-party assignment is better than none
- ISTC: Work identifier enabling linking of products across all formats

Digital product characteristics 1

The easy ones

- Product Identifier: The ISBN (of course)
- Full, distinctive title of tradable product
 - Of each individual product
 - Whether a full work, or section, part or chapter
- Contributor information
- Descriptive
 - Description of the product
 - Tables of contents
- ‘Jacket’ image
- Subject Classification

Digital product characteristics 2

Less easy

- Publisher/Imprint

- May not share branding of Publisher's physical product
- Trading name/branding aligned with ISBN prefix used
- Content Aggregator has allocated the ISBN

- Format

- Simplification of tags used in ONIX 3.0
- Critical review of file format types
- Addition of usage rights coding

Digital product characteristics 3

Trickier....

- Availability:
 - Recognition of new supply roles
 - Involvement of digital intermediaries in data supply
 - Website links to supplier/product in product record

- Price:
 - Products only available as part of a Subscription access to a wider collection
 - Departure from recommended-retail-price-to-all model?

Summary and Conclusions

- Establish scalable solutions early on
- Rely on specialists for aggregation and dissemination of content in the most appropriate form for all end users
- Pay as much attention as possible to the data used to promote your titles. In the digital arena this will be the **primary** selling tool
- Ensure unambiguous identification of the product you are selling through all content aggregators
- Implement ONIX 3.0 changes
- Engage with the new ISTC standard to enable comprehensive searching

Thank you

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