

Byte-sized stories

Ebooks are shaking up the publishing industry as MP3s did for music. Former EMI insight chief David Boyle tells **Lucy Fisher** how he's helping HarperCollins get to grips with digital consumers



CV

DAVID BOYLE

Feb 2013 – present
Senior vice-president of insight,
HarperCollins

2009 – 2013
Senior vice-president of insight, EMI,
and director of insight, Zeebox

2008 – 2009
Group development manager,
Dixons Retail

2007 – 2008
Head of forecasting and ordering
deployment, Tesco

2005 – 2007
Analyst, Catalyst

2003 – 2005
Senior analyst, New Philanthropy Capital
and policy and data analyst, Labour Party

2000 – 2003
Associate consultant, LEK Consulting

He's only weeks into his new role as senior vice-president of insight at HarperCollins, the book publishing arm of Rupert Murdoch's News Corp empire, but already David Boyle is thinking big. He's hard at work building an online dashboard where people from around the business can go to explore data about the distinct types of readers that make up HarperCollins' customer base.

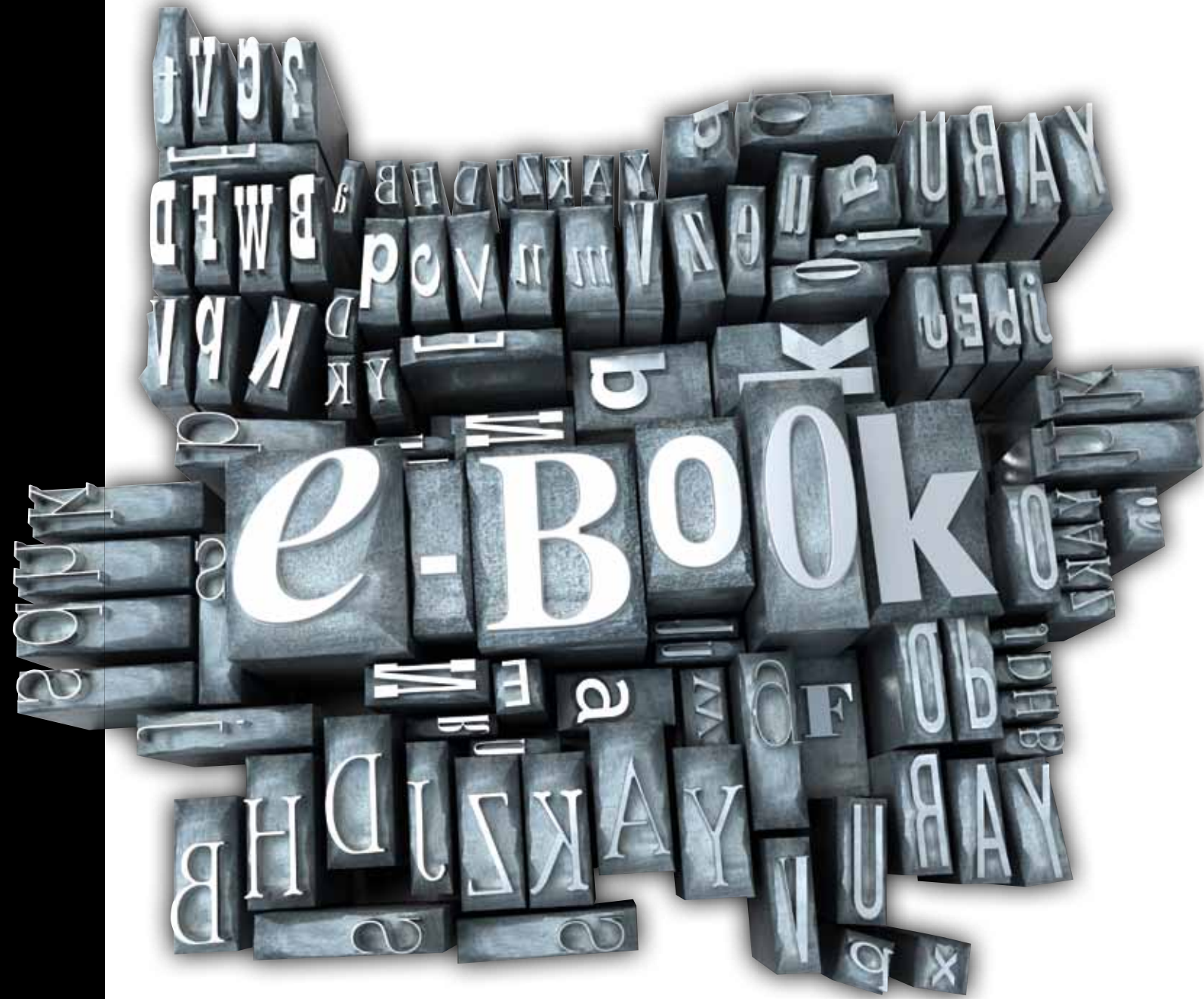
"It's about the books market widely but it's also about implications for individual authors," Boyle says. "We've picked 15 authors – a mix of household names and new and upcoming talent – and we're tackling lots of issues at the same time. We're thinking about the big issues around products and pricing."

Pricing in particular has been something of a headache for HarperCollins in the recent past. It was one of five publishers accused last year of colluding with Apple in an ebook price-fixing conspiracy designed to limit Amazon's market dominance. The charges were settled before going to court, and Amazon – along with its Kindle e-reader – remains a major threat to traditional book businesses, many of which are bulking up in a wave of consolidation.

Digital revolution

The price-fixing débâcle was before Boyle's time and, perhaps unsurprisingly, he won't be drawn on it. What he is interested in is developing an understanding of how ebooks are changing reading behaviours and book-buying habits, and how publishers can work out who's going digital and who's not.

"It's about understanding the market issues to help us be smarter and more structured in our approach," he says. "What we're developing is a lens that we'll use to look at the authors in relation to which segments are most relevant to them. It's about being a little clearer about consumers, products, channels, prices and marketing. It's not about radical, bold headlines. It's about making projects smarter."



Having spent four years at record label EMI it would be easy, perhaps, for Boyle to draw parallels with the music industry. But there are plenty of differences between the two sectors – not least the fact that few readers have switched entirely to ebooks. "A good chunk of people are digital-only in the music world, whereas physical books do still have a role. This is quite a profound difference," he says.

"I guess each media industry has a different balance. In music, digital is something of a dirty word. But in the book world it's exciting. There are similar issues in terms of how people engage with the products, but there are different implications too.

"Every consumer segment we've identified at HarperCollins values books, even if they're incredibly digital," he argues. "Vinyl was a

special object whereas CDs are not that exciting. Plastic gets tatty. Many consumers are ditching CDs, whereas books are beautiful things that have value. They play a different role. A book is something very different to a CD. You can't compare the two directly."

The publishing industry is also seeing something of a slowdown in the adoption of ebooks, Boyle notes: "The numbers are flat. In terms of finding out the why behind this, I guess there's more work to do." Meanwhile, Rupert Murdoch – a steadfast believer in the importance of print journalism – isn't about to give up on books either it seems, given News Corp's recent (failed) bid for Penguin and talk of a possible merger between HarperCollins and Simon & Schuster.

New beginnings

Boyle has been in his role at HarperCollins for less than a month at the time of our interview. It's early doors, then, but he reckons anything is possible with a clear vision of what you want to achieve. "We're in step one right now. I'm trying to tease out insight and work out how research can help," he says, circling back to talk about the online dashboard he's building. "We'll allow people to integrate the dashboard in their own way. They don't need to call me to use it. It's about spending time with people, making sure it works, making the tools exciting and letting people do it themselves."

The dashboard has been designed for ease of use. It features a drop-down menu of authors and genres, which can be split out into thousands of alternatives, but which helps to distil down key pieces of insight. "The idea is that if you pick an author or a genre it helps you to understand the consumer segments and their relationship," Boyle says. "It's author-specific and genre-specific. You can look through different lenses at consumers and explore their relationship with the author and the genre."

It's built on a cloud-based visualisation technology from Microsoft and has been amended numerous times over the past weeks following conversations with individuals around the business. Boyle is clearly not too precious about the way things are done, as long as his colleagues choose to use the insight he's offering.

"You have to have conversations with people



HarperCollins

David Boyle is compiling a dashboard to allow colleagues to explore the different types of HarperCollins readers

“For me, social media doesn't rival what you can get from surveys. My personal interest is in understanding the market at large”

RULES TO LIVE BY

David Boyle's tips on delivering impact

- Be helpful
"My top priority right now is to have a solid bed of research to really help people in what they are doing. It's got to actually help them."
- Context is key
"You need to understand the wider context in which data sits and often research is the only way to do this. Other types of data are for colouring in the gaps."
- Think 'DIY'
"Spend time with people, make sure it works, make the tools exciting and let people do it themselves."

to make sure that it works for them," he says. "The dashboard today looks nothing like it did three weeks ago. We had a rough sketch on day one – but it's not about imposing something on people. It's about context, and letting the tools fit into their daily life. That's the aim. The alternative is having to call the research guy to book a meeting."

At EMI, Boyle strived to create a culture of insight. "Our differentiation was in understanding and respecting data, not the data itself. It was in our bones, our language, our culture. It felt sensible and natural." Yet he didn't set out to achieve this by dictating from above. Rather it came about through a process of diplomatic, grassroots engagement.

This is the process that's now underway at HarperCollins. He's starting small – his department is effectively a one-man band – but Boyle's clearly building towards something bigger. "I'm having fun," he says. "I'm sure the team will grow but it's step by step." It was a similar story at EMI, where the 'million-interview dataset' he created started with just him, his laptop and some Excel software.

Hearts and minds

Boyle might find himself in a new industry, dealing with different dynamics, but one thing that has stuck with him through the transition is his scepticism towards the use of social media for research purposes. "Every few months I check in to see where it is and how far it might have developed – and then I put it back in the drawer. For me, social media doesn't rival what you can get from surveys," he says.

It's a view that has left him somewhat isolated when presenting conference papers to rooms full of market researchers, for whom online surveys can seem rather old-school – if not dreary. "My personal interest is in understanding the market at large," Boyle argues. "There are lots of vocal people who love books out there but there are also those who don't. We want a representative sample. It's about avoiding bias."

STATS

£1.9bn – the total value of the UK book market in 2012, including £250m of ebook sales, according to *The Bookseller*. Richard Mollet, chief executive of the Publishers Association, said: "While digital sales are growing by comparison to physical sales, nothing points towards a catastrophic cannibalisation of one format by the other, but rather it points to a diversification of the reading audience"

28% – the proportion of adult fiction and non-fiction sales in the US that are in the format of ebooks, according to the Association of American Publishers

20% – the proportion of US adults who own an e-reading device, according to eMarketer

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Take for example the fact that, statistically, people who tweet about music are wealthier, London-based fans of dance or electronic music and dislike more mainstream music.

"They may tweet that they like a track, but the mainstream person who is not tweeting is not

Ebooks and e-readers might be popular, but very few people have gone digital-only, says Boyle



there," says Boyle. "I much prefer representative research."

Similarly, he's found that people can become over-awed with big transactional datasets. At EMI, he says, people would assume that because they had iTunes and billions of transactional records they had access to a wonderful, clean dataset. "But the whole population doesn't use iTunes," Boyle says. "You only see the EMI part of that data. It's actually very limited. We need to know what people buy from other places."

Boyle is a strong believer that to make data and insight effective you need to make it palatable to an organisation at large. His approach could be described as a kind of democratisation of insight. Rather than telling people what his research has uncovered and what that means they should do, he seems to prefer it when colleagues are empowered to come to their own conclusions. Modest by nature, he does acknowledge that this is where some of his success lies: "I like to help people. It's about being diplomatic and speaking the right language. That's where many analytical projects fail."

Helpful he may be, but Boyle stresses that he's no pushover. "It's not about telling people what they want to hear." Instead his approach is guided by the knowledge that, in the creative industries especially, it is people with hearts and minds who make decisions. No amount of data can change that unless the individual decides that the data has something useful to offer. Pragmatism is his watchword, then – not data for data's sake. ■

CAREER PROFILE

David Boyle graduated from the University of Warwick in 2000 with a degree in mathematics. He describes himself as "not creative in the slightest" yet has worked his way up into insight director positions at music label EMI and now publisher HarperCollins.

Boyle says he is passionate about bringing consumer insight into the heart of decision-making, claiming to enjoy galvanising diverse groups of "often sceptical" people around consumer insight. He designed and led a global consumer insight capability at EMI,

building a scalable engine from scratch – one which was later described as "front and centre" of the company's pitch to buyer Universal, ahead of its £1.2bn takeover last September.

A colleague who worked with Boyle at Tesco describes him as having great skill in

making data understandable to "normal human beings". Clearly enthusiastic about what he does, he has also been described as "a breath of fresh air" by Carlos Somohano, who heads up the data science community, Data Science London.

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