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Electronic Reference: The Publishers' View

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to do with our old friends, the reference books. Librarians did not write the texts, arrange the entries, or create the indexes in reference books; we helped people use the best tools that we had. We do the same thing in the electronic world. We don't build the databases, write the software, or index the files — we help people use the best tools that we have. Yesterday those tools were books. Today that tool is **Google**. Tomorrow that tool will be something else. The only constant is that reference librarians will be there to help people use them.

For reference publishers, I doubt that the outlook is as rosy. For centuries, printed publications were the best sources because they were the only way to disseminate information to a wide range of people on a timely basis. Publishers developed products that filled specific needs for information at the same time they made profits for the company. The publishers controlled content and distribution. When electronic resources first came about, publishers migrated those publications into the electronic world as proprietary products such as the **Gale Resource Centers** or the **Oxford Reference Collec-**

tion. However, use still required purchase by a library and some sort of authentication of the user through IP address, proxy, or password, which limited distribution and access. With the free-for-all world of the open Web, no one controls the content and distribution is universal. Buried amongst the Viagra ads, mortgage refinancing offers, and porn is a wealth of factual information beyond what most libraries ever contained in their print reference collections. Barring a complete collapse of the Internet or a total restructuring of the economics of the Web, publishers will no longer have control over content or distribution. The public has discovered this wealth and they are not going to return to reference books as long as the Web is more convenient, faster, and less expensive.

The future does not look good for reference collections. I will still buy reference books, but not as many as I used to. As the use of the ones that I do buy declines, I will transfer them into the main book stacks, so that the few people who do use them will be able to check them out. Over time, the reference collection will wither away. I am not sure if it will die out completely, but the prognosis is not good. If I were a reference publisher

(as many of the readers of this journal are), I would start looking for a new line of business. When the classics mentioned above have become of questionable value, the rest of the reference collection is in deep trouble.

I am going to miss *Facts on File*, I really will. In fact, since it is prepaid for 2004, it will actually keep coming until the end of the year. Each week, our student assistant will dutifully file it in its funky blue binder, never to see the light of day again. Of course, we'll keep the old ones in case someone wants to use them. But after December, this little weekly messenger will quit bringing us its news that no one reads. At the end of the year, perhaps we should have a ceremony to mark the end of *Facts on File*. Or should we have a funeral, marking the symbolic end of the print reference era?

Endnotes

1. I use the word perceived because we actually ended up with a healthier budget than expected. This makes the canceling even more remarkable, since we decided to cancel it anyway.
2. See "What Were They Thinking: The Oxford English Dictionary on the Web," *Against the Grain*, v. 12 no. 4, September 2000, pp. 38-42.
3. Janes, Joseph, "Introduction to Reference Work in the Digital Age," New York: Neal-Schuman, 2003, p. 31.

Electronic Reference: The Publishers' View

by **Irving E. Rockwood** (Editor & Publisher, **CHOICE**, 100 Riverview Center, Middletown, CT 06457; Phone: 860-347-6933 x119) <irockwood@ala-choice.org>

Readers of last September's issue of *Against the Grain* may recall my article, "Reference Publishing: The View from Middletown." In this piece, I noted that the number of print reference titles being submitted to **CHOICE** has been declining steadily. As **Bob Balay** wrote in the November 2002 issue of **CHOICE**, "fewer [printed reference titles] come through the door every month, and even the fall releases, coinciding with the beginning of classes, do not produce the flood

of new titles we have seen in the past."

One year later, the picture is little changed. As the chart below indicates, publishers were submitting nearly 1,900 new reference works per year to **CHOICE** as recently as 1998-1999. Today they are submitting roughly half as many. Publishers who submit titles to **CHOICE** are producing significantly fewer print reference titles than in the past, even as the total number of titles submitted to **CHOICE** holds relatively constant.

Unfortunately, we cannot prove this. Although we track the number of print titles submitted, we are unable to do this for electronic works." These statements too remain true in 2004.

How then to find out what is happening on the electronic reference publishing front? The obvious answer was to ask the publishers themselves. To that end, **CHOICE** recently conducted an online survey of reference publishers, an effort that elicited responses from some 23 intrepid individuals from an equal number of firms. The resulting sample represents roughly 20 percent of the publishing houses that have submitted one or more reference works to **CHOICE** over the past five years. We make no claims on behalf of the statistical significance of our results, but we do think they are interesting and hope you will agree.

What then, did our respondents tell us? How does this brave new world of electronic reference publishing look from the other side of the divide? What exactly is happening out there?

Well, for starters, a lot of our respondents are already publishing electronic materials. Some 16 out of 23 (roughly 70 percent) indicated that they publish at least some electronic reference titles. Although dominated by commercial houses, the affirmative group included

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Print Reference Titles Submitted to CHOICE, 1997-2004

Volume	Period	All Titles Submitted	Reference Titles	Reference %
35	Sept 1997-Aug 1998	22,956	1,852	8.1%
36	Sept 1998-Aug 1999	23,472	1,891	8.1%
37	Sept 1999-Aug 2000	25,108	1,782	7.1%
38	Sept 2000-Aug 2001	23,160	973	4.2%
39	Sept 2001-Aug 2002	22,160	1,014	4.6%
40	Sept 2002-Aug 2003	23,425	937	4.0%
41	Sept 2003-Aug 2004	23,375 (est.)	1,066 (est.)	4.6% (est.)

In my 2003 article, I went on to observe that, "Here at **CHOICE** we suspect that the decline

in print reference titles is being...offset by a corresponding increase in electronic title out-

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five non-profit publishers, **American Psychological Association, Oxford University Press, Philosophy Documentation Center, Resources for the Future, and University of Virginia Press**. The other 11 respondents falling in this group were commercial presses: **CQ Press, Edward Elgar, Elsevier, Facts on File, Greenwood, Grey House, Hoover's, Information Today, Phaidon Press, Sage, and Springer**.

In addition, we also heard from seven houses who indicated they do not currently publish electronic reference materials. These were **Ashgate, Camden House** (now an imprint of **Boydell & Brewer**), **Continuum, Eerdmans, Kent State University Press, Thames Hudson, and Uni-**

versity of Pennsylvania Press. As readers may note, this group has a decided UK flavor as four out of seven are UK based. And it is dominated as well by commercial houses, including only two non-profits (**Kent State University Press** and **University of Pennsylvania Press**).

This then is our sample—16 houses that currently publish electronic reference titles and seven that do not. And here are some of the things they told us.

What is your current mix of print and electronic offerings? Some 17 respondents answered this question. As can be seen below, these houses are currently publishing roughly three out of four (72.2%) of their reference titles in print only. They are issuing roughly one out of four (24.1%) in both print and electronic formats, while electronic only titles account for a mere 3.8 percent of their title output.

	Print Only Titles	Electronic Only Titles	Dual Format Titles
Maximum %	100.0%	40.0%	100.0%
Minimum %	0.0%	0.0%	0.0%
Average %	72.2%	3.8%	24.1%

We then asked, "*What do you expect your mix of products will look like in three years?*" The 16 respondents who answered this question clearly anticipate increasing their output of electronic materials. As a group, they expect their output of print only titles to decline from the above-mentioned 72.2 percent to roughly

one out of two (50%). Most of this additional electronic publishing, however, will take the form of dual-format titles, which accounts for nearly 45% of our respondents' anticipated future title output. By comparison, they expect electronic-only materials to account for a mere 5.1 percent of their output three years from now.

	Print Only Titles	Electronic Only Titles	Dual Format Titles
Maximum %	100.0%	40.0%	100.0%
Minimum %	0.0%	0.0%	0.0%
Average %	50.2%	5.1%	44.7%

Our publishers who responded to these two questions can be further subdivided into two groups—those who expect their program to change and those who do not. Some five publishers fall in the second category, and they are a mixed lot. Two currently publish 100 percent of their titles in print only and have no current plans to alter this mix. Another currently publishes 100 percent of its titles in both print and electronic, and expects to continue to do so. The remaining two currently publish at least some electronic only or dual format reference titles but do not expect those percentages to change.

Of the 11 publishers who do anticipate change, 100 percent expect to increase their output of electronic titles. While the projected mix of formats varies widely from house to house, the average for these houses is 43.9 percent print only, 7.0% electronic only, and 49.1 percent dual format. If so, a majority of the reference materials from these 11 houses will within the next three years be released in electronic format, often but not always accompanied by a print version.

What factors determine the format of new products? How do our respondents decide whether to issue a new title in print or electronic

format? Of the 14 publishers responding to this question fully eight mentioned "market needs," "market demand," or "audience" with two specifically citing "library demand" as a factor. Production costs were another factor mentioned by several respondents. As one noted, "We only publish eBooks when we have had the manuscript typeset ourselves and can easily generate the PDFs. Many of our authors supply us with CRC [camera ready copy] which would have to be converted...at some expense. We are still 'testing the waters' of eBooks and are not ready to spend the extra money to convert these at the present time."

Which format is LESS expensive to produce? Not so terribly long ago, many librarians and publishers were optimistic that electronic publishing would prove less expensive than print. We have heard rather less about this lately, perhaps for good reason if our sample is at all representative. Of the 12 respondents who answered this question, only three (25%) chose electronic as the "less expensive" format. The remaining nine (75%) indicated either that print was cheaper or that costs were about the same

for both. Since these answers are presumably based on actual experience, they do not bode well for that wonderfully inexpensive digital future many of us anticipated only a few short years ago. But perhaps this comes as no surprise at this point, especially to anyone who has been involved with one or more significant software development projects. The distribution costs for electronic products are indeed lower than for print, at least in most cases. The real question is whether there are any savings in so-called "first copy costs," the various expenses required to produce that first copy of the work that typically account for the lion's share of publishing expense. If our respondents are any guide, the answer appears to be no.

What are the major differences in the editorial requirements for electronic and print reference materials? While responses to this question varied, several themes emerged from the answers we received. Interestingly, two respondents indicated that "There are no significant differences." A third indicated that he or she was "not sure". However, most agreed—either explicitly or implicitly—that the two formats do have different editorial requirements. Among these, the ability—and need—to update electronic materials frequently, if not continuously, was cited by several respondents. As one publisher noted, "Electronic reference materials can be updated and changed while print cannot." Or, in the words of another respondent, "Up-to-date data [is] more important in electronic references—customers [are] more willing to forgive outdated info from print sources." In addition, several respondents noted that electronic materials have fewer space limitations. In one respondent's words, "MUCH more data can be required on the electronic side since space is not limited. Also, it is in our interest to capture data that may not be used now since it might be used later as we link to other electronic resources."

How do the audiences for print and electronic reference material differ? Here again not everyone agreed that there are differences in the audience for these two types of materials, but most did. One lone dissident whose response speaks for itself simply noted, "They don't." Our ten other respondents, however, felt differently. The most commonly cited difference was that the audience for electronic materials is more restricted than for print because it is exclusively institutional. As one publisher noted, "Libraries are the only audience for electronic; print has a text/trade market as well as library." To be sure, the distinction is apparently a fine

one. Another respondent indicated, "We still sell to libraries, so in a sense there's only one audience. But there does seem to be a real cultural change among library patrons. Many presumably dominated by younger users now [who] expect to find information first electronically."

Having queried our publishers about the current state of their programs, we turned our attention to the future. Which format, print or electronic, has the most revenue potential? And

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what are your current plans for your print program?

How do the revenue and market potential of these two formats compare? This question elicited a total of 12 responses. Fully one-third of these four were non-committal. As one perhaps slightly depressed respondent noted, "The budgets are the budgets. Everyone has only so much money to spend. Libraries are struggling with where they allocate their spend[ing]." Most of our respondents, however, expressed optimism about electronic's future revenue potential, at least over the longer term. The following comments are typical:

"The revenue we derive from our online database sales is still a relatively small but increasing percentage of our overall revenue. We believe there is a growing market for online reference materials."

"Electronic has more market/revenue potential in the future."

"For us print reference materials still generate the bulk of our revenue from reference products. However the market potential is clearly on the electronic side, and we are investing heavily in this area."

These responses, with their optimism about the future of electronic reference publishing, provide a nice segue to our next question, *Which of the following best describes your firm's plans for your print reference publishing program?*

- We plan to phase out our print publishing program
- We plan to expand our print publishing program.
- We plan to continue our print reference publishing program at its current level.

Print lovers—like myself—will be heartened to know that none of the 13 publishers who answered this question chose the first response. No one, it appears, is planning to phase out their print reference publishing program. In fact, four out of 13 (30.8%) are planning to "expand" their print publishing program. But most, nine out of 13 (69.2%), are planning to continue their print program "at its current level"—presumably while expanding their electronic program. Except perhaps for one respondent who wrote, "We plan to continue our print reference program to the extent necessary

but also plan to phase it out to the extent possible. We want to invest in the creation of reference products that facilitate linking to other content and other resources. This is only possible on the electronic side." Print is dead. Long live print.

What then, in the view of our respondents, is the state of electronic reference publishing? In a word, "promising." Most plan to do more of it. Despite this, virtually none are currently planning to phase out their print program. And most are optimistic about the future of electronic reference, even if the exact arrival date of that future seems a bit fuzzy. The overall mood seems to be one of cautious optimism, as exemplified by the following two comments:

"The inroads many publishers have made in the electronic reference publishing field have made us both enthusiastic and cautious about our own entry into this area. We feel the industry is still grappling to find the best method for publishing electronically, and we are therefore thoroughly investigating the many options available to us."

"It seems likely that electronic products have more growth potential than print (at the expense of print). But folks have been saying that for years, and we're still waiting."

And so perhaps are we all, except for those of us who are not—a group that includes many librarians, library patrons, and a growing number of publishers. Clearly if title submissions to **CHOICE** are any indication, many reference publishers have already significantly reduced their print title output. And if the results of our mini-survey are any guide, the most likely explanation is a steady, if at times, hesitant and uncertain shift to electronic materials.

What this all augurs for print, and for libraries, remains to be seen. Print, it seems to this observer, is unlikely to go away completely as a format for reference materials. Print's handiness, portability, ease of use, and relatively low cost will continue to make it ideally suited for some types of works, particularly those designed primarily for individual use. The advantages of electronic on the other hand—the ability to link, to accommodate many different types of data, not to mention its immense storage capacity—make it the better choice for a range of products that are either impossible to produce in print or would be less useful in print. The future of reference publishing, it would seem, is more likely to encompass both bytes and books than either alone.

Food for Thought — Information Quality in Reference Publishing

by Karen Christensen (Co-founder, Berkshire Publishing) <karen@berkshirepublishing.com>

This time of year, I like to watch city people buying sweet corn. At **Taft Farms** in Great Barrington, Massachusetts, the sign over the rough wood corn bin reads, "Don't pull the ears, our corn is freshly picked and raised by the integrated pest management method." The bin is invariably surrounded by tourists with tense shoulders and rapid hands, pulling and picking at the moist green ears, shamelessly stripping back the tops to peer quizzically at the silky threads covering the kernels.

How do you tell if an ear of corn is going to taste like morning sunshine stirred into cream? The fact is, corn flavor is largely determined by the variety the farmer has grown and by how fresh it is.

This two-part article is an introduction to the process of creating reference works today. I don't write from a lofty position in a bastion of academic publishing, but from the down-to-earth experience of founding and running a growing publishing company, **Berkshire Publishing Group**, that has had the privilege, over the past ten years, of working closely with most of the major reference publishers in the United States. In the next installment, I will explain some of the financial issues and challenges that affect the products offered to you by publishers.

Right now, let me now lead you out into the cornfields and show you where encyclopedias begin and how they grow.

Information Quality

Quality matters to publishers, as it does to librarians, but how we define quality varies. One person might feel that scholarship is the only factor needed to evaluate a reference work; thus, the numbers of contributing professors from **Yale** and **Oxford** is what really matters. Some feel that currency and political correctness are essential.

I've met some librarians who feel that it is not their place to comment on the quality of the books they buy because, to paraphrase **S. R. Ranganathan**, every book has its reader, and every reader, his or her book. The Web, with its infinite space, comes close to offering an infinite array of material, but publishers, librarians, and retailers, being limited in what we can offer, must stake our hopes on a high-quality selection.

At its best, an encyclopedia is some of the finest food for thought you can ask for. What makes a fine encyclopedia depends on the topic, however.

For *World History* (forthcoming, Dec. 2004), we strove to balance scholarly authority with a fresh presentation. With the *Berkshire Encyclopedia of World Sport* (forthcoming, May 2005), we suspect readers will value an author's experience as an athlete or sports professional over academic status.

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