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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.

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

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 output. 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 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 interpid 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

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 University 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% of their title output.

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

| Maximum % | Print Only Titles | 100.0% | Electronic Only Titles | 40.0% | Dual Format Titles | 100.0% |
| Minimum % | 0.0% | 0.0% | 0.0% | 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 percent 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 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, he ability—and need—to update electronic materials frequently, if not continuously, was cited by several respondents. As one publisher stated, “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 charge 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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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.

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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