September 2003

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Recommended Citation

Rockwood, Irving E. (2003) "Reference Publishing: The View From Middletown," *Against the Grain*: Vol. 15: Iss. 4, Article 8.
DOI: <https://doi.org/10.7771/2380-176X.4475>

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Reference Publishing: The View from Middletown

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

Perhaps the first thing to be acknowledged in any article on reference publishing is the elusive nature of the subject matter. Reference publishing turns out to be one of those seemingly simple terms that, although widely used, are extremely difficult to define at a practical level.

Ridiculous, you say. I know what reference publishing is. It's what reference publishers do. I realize the situation is a bit more complicated than it used to be, what with all these electronic reference materials on the market. Still, if your topic is reference publishing, all you have to do is take a look at reference publishers and start pontificating. What's the problem?

Well, it's not the pontificating. That part I can handle. The hard part is the first step, pulling together that all-important list of "reference publishers." To do that, we have to first define the term reference work. Then, once we've got our list of publishers, we have to hope that they comprise a coherent, readily identifiable, group, preferably one for which we can reasonably expect to obtain some basic comparative data, e.g. title output, revenues, etc.

Welcome to mission impossible. The difficulties start with the definition of reference work. It's not that there are none to be found. Consider, for example, the following "conventional" definition from the home page of the Reference and User Services Association (RUSA) Website. According to RUSA, a reference work is "a work compiled specifically to supply information on a certain subject or group of subjects in a form which will facilitate its easy use," or, as the **ALA Glossary** states it, "any source used to obtain authoritative information in a reference transaction."

At first glance, this definition seems fairly straightforward. It conjures up images of things like encyclopedias, dictionaries, and handbooks, exactly the sort of materials that most of us think of when we hear the term reference work. Today, of course, many of these works are available online, but that is nothing more than a format change.

Or is it? Consider, for example, a student who approaches the reference desk in search of information for a paper on the impact of oil on domestic politics in the Middle East. What type of sources is his or her friendly local reference librarian likely to suggest? Encyclopedias? Perhaps. Dictionaries? Probably not. Specialized reference works on the oil industry and the Middle East? Sure. Online resources? You bet. And what would some of those online resources be? Journals? Yes. Databases? Of course. eBooks? Well yes, if the library has any—as it probably does. And what type of books might be included in the library's eBook collection? Might it include, for example, that recent monograph by author Big Name from Prestigious University Press? Well, yes. I get your drift. What you're suggesting, I think, is that a change in format—from print to electronic—can change the nature of a work, converting what was once a monograph into a reference work. Hmm.

Suddenly the plot thickens. The problem with our definition is not what it includes but what it excludes—almost nothing. In today's digital environment, virtually everything is a potential reference work. Journals, monographs, and data, they're all "in a form, which will facilitate easy use." So what's a reference work? And more to the point, what's not? Good question, and therein lies difficulty number one.

OK, you say, but let's get practical. We all know a reference work when we see one, do we not? Furthermore, we all know there are a bunch of publishers out there who specialize in publishing this kind of material. Enough of the quibbling, already. Let's pull together our list of publishers and get started.

Fair enough. This we can do. In fact, it's already been done. Visit AcqWeb (<http://acqweb.library.vanderbilt.edu>), for example, and you will find an extensive list of Reference Publishers. To be sure, it's not as current as one might like, having last been updated in late 2001. As a result, it includes a number of houses that have recently succumbed to a merger or other natural disaster, e.g., **Chadwyck-Healey**, **Fitzroy Dearborn**, and **Oryx**. And there are also, in this author's view anyhow, some errors of omission. Furthermore, as anyone familiar with the publishing industry might expect, the firms included are an exceedingly diverse lot, ranging from huge multi-national conglomerates—or imprints thereof—to small privately owned presses specializing in a single subject area, or even a single product. Still, it's a useful starting point.

Unfortunately, that's all it is—a starting point. When we attempt to move on, we run almost immediately into a dead end. Looking for industry statistics on college text publishers? No problem. Trade publishing? Gotcha. University presses? Right here. Religious publishers? Roger. Reference publishers? Good luck. Case in point. *Literary Marketplace*, the most widely used directory of the US book publishing industry includes a section on "Reference Books for the Trade" but does not use "Reference" as a category in its breakdown of publishers by "Type of Publication." And how about statistics on reference title output? Good luck again. All of which is to say that the term "reference publishing" doesn't appear as a discrete category in any of the readily available industry statistics. Maybe someday it will. In the interim, we're on our own.

That said, the situation is not entirely hopeless, especially if we lower our expectations a bit. It just means we have to be creative, expanding our search beyond the usual venues to less obvious sources of relevant information. Sources like *Choice*, for example, where the editorial staff spends a great deal of time looking at, evaluating, and thinking about reference works and reference publishing in general, and...most important...tracking the results of this work.

As long-time readers know, the Reference section, edited by **Bob Balay**, editor of *Guide to Reference Books* 11th Edition, is consistently one of the largest sections in *Choice*. This past volume year (September 2002 through August 2003), for example, reference works comprised 728—or just under 11 percent—of the 6,785+ new reviews appearing in *Choice*. A longer-term study would show similar results for the past five years. All of which is to say that for some years now, *Choice* has reviewed an average of roughly 700 new reference works annually.

What these figures do not reveal, however, is the changing mix of materials being submitted to *Choice*. As **Bob Balay** noted 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." The validity of **Bob's** observations can be easily verified by examining the number of print reference works submitted in recent years.

continued on page 28

Print Reference Titles Submitted to CHOICE, Volume Years 1998-2002

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	23,300 (est.)	950 (est.)	4.1% (est.)

As the data shows, the basic trend is clearly down. As recently as 1998-1999, publishers were submitting nearly 1,900 new reference works to *Choice* annually. Today they are submitting fewer than 1,000 such titles—or roughly half as many. This is a significant decline by anyone's standards. The times they are a'changin', and reference publishers who submit titles to *Choice* are clearly changing with them, publishing significantly fewer print reference titles than in the past, even as the total number of titles being submitted to *Choice* holds relatively constant.

In addition, the *Choice* data offers confirmation of at least one other trend, the generally recognized decline in CD-ROM reference titles. Of the 93 electronic reference titles reviewed in *Choice* Volume 35 (1997-1998), some 34 (36.6%) were CD-ROM products. The comparable figure for Volume 40 (2002-2003) is 10 out of 119 (8.4%). While not completely extinct, the CD-ROM reference title is clearly an endangered species.

Beyond this, things get a bit fuzzy. Here at *Choice* we suspect that the decline in print reference titles is being more or less 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. When submitting print titles to *Choice*, publishers forward us a physical copy of the work. This can be easily tracked. With most electronic titles, however, and especially Internet resources, the process is different. In most cases, we do not receive a physical copy of the work. Instead, we receive a phone call, an email, or a catalog or flyer describing the new product. This information is routed to the appropriate editor for a selection decision. If the editor selects the product for review, he or she will assign a reviewer to the project and contact the publisher to work out, among other things, the arrangements for providing the *Choice* reviewer with access. In due course, the reviewer will evaluate the site and submit his or her review. Once the review is submitted, it will be edited and published in the normal manner, all without any physical object—other than possibly a catalog or flyer—ever arriving at *Choice*.

Unsurprisingly, given the nature of this process, our data here at *Choice* sheds little light on the volume of new electronic reference works being published. We know that we receive a steadily increasing number of queries and announcements from publishers about such works, but we do not currently track the volume of these inquiries.

And even if we did, this might not tell us a great deal given the increasingly complicated, ambitious, and pricey nature of some of these works. If a publisher who formerly released 100 new print reference titles annually at an average price of \$50 each is now releasing 10 new electronic products a year at an average starting price of \$500, has the publisher's output gone up or down? From a cataloging standpoint, the answer is down. But from a collection development budgetary standpoint, the answer is less clear. And how is one to count the various incremental improvements continually being announced for the larger and more established online database products? When Publisher X announces the release of Version 4.0 of the Common Academic Sources Homepage for its extremely popular Comprehensive Online Website (CASH COW), does this count as a new publication, a revision, or none of the above? Absent reliable revenue (and expense) figures—which few houses are willing to divulge—it is hard to guess what the financial implications of these and other trends associated with the brave new world of electronic reference publishing might be.

And finally, what of the much-discussed consolidation trend among academic publishers? How, if at all, has this trend played out among academic reference publishers? This too is a bit difficult to determine from the *Choice* data.

The most relevant *Choice* data concerns publisher participation in our Forthcoming Reference feature. Appearing annually in the November issue of the magazine—and beginning this year simultaneously in *ChoiceReviews.online*, this highly popular feature lists new reference titles scheduled for release during the coming year. While *Choice* editors have final say on the titles included in the final list, we rely on publishers to supply us with the information from which this list is compiled. To do this, we mail out announcements each year inviting reference publishers

to forward a list of their forthcoming titles. The final list, the 19th edition of which will appear this November, is then compiled from the information submitted by those publishers who choose to participate. Thus the number of publishers participating in this project, and the identities thereof, is a rough indicator of the general state of the reference publishing industry over time.

Interestingly, the number of publishers participating during from 1998 to 2002—the last year for which current data is available—has shown very little fluctuation. The total number of participants during this period ranges from a low of 45 in 2000 to 59 in the following year (2001). This past year (2002), some 55 publishers participated. By comparison, only 48 did so in 1998. It is hard from these numbers to draw any significant conclusions about consolidation trends among reference publishers. If anything, one might conclude that there has been a slight increase in the number of players during the past five years. However, it is also possible that the general trend, small as it is, simply reflects an improvement in the effectiveness of *Choice*'s efforts to involve more publishers, something on which we are continually working.

We can learn a little more by looking at the list of individual publishers. Among the 33 publishers who have participated most often (3 or more times) in the past 5 years, a total of three (3) have sold out to a larger house during this period—**Fitzroy Dearborn** (Routledge/Taylor & Francis), **Libraries Unlimited** (Greenwood) and **Oryx** (Greenwood). As of this writing, the **Fitzroy Dearborn** name still appears as a distinct imprint on the **Routledge/Taylor & Francis** Website whereas the **Libraries Unlimited** and **Oryx** imprints appear to be in the process of vanishing following a recent **Greenwood** reorganization. Offsetting the loss of these three firms, or their imprints, has been the expansion of the reference publishing programs at **Sage** and **M. E. Sharpe**, both of which have significantly ramped up their reference title output in recent years.

Examining the larger universe of 130 or so publishers who have participated in at least one of the last five *Choice* forthcoming reference lists, we can find a few additional casualties. Among the formerly independent reference publishers recently acquired by larger firms are not only the three listed above but also **Chadwyck-Healey**, **Charles Scribner**, **Garland**, **G. K. Hall**, **Grove's Dictionaries**, **Macmillan Reference**, **Scarecrow**, and **Schirmer**. Similarly, we can also find a small number of new names, e.g., **Nature Publishing Group**. However, it is true, on balance, that there have been more "subtractions from" than "additions to" the list. Furthermore, the list of subtractions consists by and large of relatively well-known and highly visible reference publishing imprints. But then, that is the nature of the consolidation process. Among those firms whose owners are, for whatever reason, interested in selling at any given time, only those whose imprints have value are likely to be purchased. The others will simply fade away.

And that, I fear, is about as far as the *Choice* data can take us. To be sure, it hasn't taken us all that far. But at least it provides confirmation of a couple of generally observed trends. Those publishers who submit titles to *Choice* are clearly publishing fewer print reference works and many fewer CD-ROM reference products. It seems likely they are publishing more electronic works, and that most of these are Web-based. And as for industry consolidation, maybe it's happening and maybe it isn't. It probably is, but we'd need more data to be sure.

In short, an interesting start, but not much more. Clearly, there is a lot more to learn about reference publishing. A justification, if ever there was one, for a follow-up article. Stay tuned. ...

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