# The Future of Reference Publishing: Interview with John Dove, CEO, and James Raiher, Publishing Manager, Xrefer Ltd

*This interview is extracted from a report entitled "The Future of Reference Publishing" published by Electronic Publishing Services Ltd in October 2005, and is republished in Elucidate with their kind permission. For details of how to purchase the full report see http://www.epsltd.com*

*How has the movement of selling of reference works online affected print sales?*

It used to be the case that a quality reference work was sure to have 2,000 purchases by libraries. So as long as a publisher could control costs to break even at 1,500, they were pretty much assured of a profit. Now only 700 or 800 can be counted on. It is clear that publishers can still make money by selling print-based reference content, but it is a riskier business than in the past. There are still reference works that sell 8,000 or even 10,000 but these are the exceptions. The fall in print sales is reflected by the experience of libraries that have found usage of their reference rooms declining. While print reference still has a place, the ability to continually update online content gives networked-based services a significant advantage over print for those reference works such as directories that provide up-to-date information.

The reference works in which print will continue to be highly valued will be those where the reader benefits from the high quality of layout and imaging that is still vastly superior in print rather than online.

*Which online business models are most commonly used by reference publishers and aggregators of reference content?*

There are several business models in use by reference content publishers and aggregators, including:

- Usage-based: Services are charged for based on the levels of usage achieved (simultaneous user limitations, pay-per-view, pay-for-clicks, connect fees, etc.). Librarians tend not to like this model because they want to be able to encourage usage without having a negative impact on their budget. Too many times they've seen companies come in at a very low price, but then usage grows and the budget gets squeezed;

- Full-time equivalent (FTE) model: Services are charged for based on the population served. For example, this could be the number of students at a university, or the population of a local area. This is the model employed by Xrefer;

- First few accesses are free prior to charging a subscription (this is used by HighBeam, for example);

- Advertising is also used by reference publishers to supplement subscription income. In certain ways Google is itself a 'publisher' and many users use it for traditional reference questions, even as a 'spell checker' – much to their peril.

*How will publishers be able to compete in this online world?*

Free content will continue to grow, whether published by governments, non-profits, or even produced by volunteers (the main example here is Wikipedia). However, publishers will continue to ply their core skills of assembling the world's best experts and educators to put them to the task of explaining crisply and coherently the whole landscape of particular fields of study. While free content sources may be of value to casual users, those needing the content for business or educational purposes must be able to trust the source implicitly. The difficulty is that for most users 99.9% of information on the Internet is of no use, but the 0.1% that is highly valuable differs from individual to individual. In order to find this 0.1%, users need authoritative facts as a basis, with the added ability to make sense of this information. This is where Xrefer believes its value lies: in the contextual links created among the world's best and most authoritative reference sources. Some users want a quick definitive answer while others need to understand the answer in context – at present lists of search results do not facilitate this, and there is an important role for the visual representation of search results.

Xrefer believes that as a reference aggregator it is well positioned to provide the necessary context around the content. Searching online enables users to easily answer questions that could be very difficult to address in a print world. For example, a user interested in the American Civil War might want to know which historical figures lived within 20 miles of the battle of Gettysburg. Trying to find this in a physical print library would be almost impossible to fully research. But content marked up with geographic tags by an aggregator of reference works (because no single publisher will have all the information) could produce this fairly easily.

*Who buys reference publishing material?*

Xrefer's principal buyers are libraries, although a successful subscription pilot was launched for individuals this year. There is a range of library types, including:

- School (K-12) libraries;

- College and university libraries;

- Research centres;

- Public libraries;

- Government libraries;

- Medical libraries;

- Corporate libraries in a range of vertical sectors.

*Is the customer base changing online?*

The role of the librarian is changing, and the amount of interaction that librarians have with end users is very much reduced now. Some of the librarian's traditional roles translate well online, and libraries can offer facilities such as 24/7 assistance through chat services. Guided orientation is also possible, with librarians providing pathfinder documents for new students trying to understand the range of resources available through the library. However, many end users feel that they do not need assistance and see research as a self-serve activity that they do only online. Distance learning is also an important driver for online reference.

*How are customers' expectations changing?*

Search engines have conditioned users to tolerate some fuzziness in their search results. In other words, false positives are considered OK (as long as they don't overwhelm the desired results).

*What do you feel will be the impact of services such as Wikipedia, Wikibooks, the Open Content Alliance and Google Print?*

Xrefer already integrates free content such as the *CIA World Fact Book* and government-published statistical data such as parts of the *Statistical Abstracts of the United States.* Census data from the United Nations, Canada, and hopefully the EU will also be added soon. If and when librarians find it valuable to do so, Xrefer is also prepared to add snap-shots of content from Wikipedia.

There are some highly regarded open-access reference content resources and Xrefer will seek to include them in its online reference service. Google Print, Google Library, and the Open Content Alliance are positive trends towards the goal of providing everyone in the world with awareness of potentially useful information. Clearly that awareness has to be provided without compromising the legitimate interests of the copyright holder. In reference there are some special problems that have to be worked out with the schemes being discussed in the industry for indexing information. For many reference works, returning a sample of the information may, in fact, give away the whole of the content (for example with many dictionaries).

*Do you foresee any other threats for reference publishers? How could reference publishers counter these?*

The rise of the second-hand book market is a major challenge to all types of publishers, and is becoming more of a threat as re-sellers like Amazon introduce services such as offering both new and used copies of book titles. Discounting in bookshops is also challenging for publishers.

Books are now under more scrutiny from end users and librarians, who were previously unable to double check their content – there is now so much more easy availability of content that publishers must be very careful about their fact-checking prior to publication.

*What are the main opportunities available to reference publishers? How could they best take advantage of these?*

The Internet provides publishers with paths to new potential markets, and publishers are able to expose their content to a wider audience through tagging it well, and through services such as Google Print. Working with aggregators is a very low-cost activity which can significantly increase usage and, in turn, sales. However, it takes a lot of time and investment to get fully involved with the new technology – many of the smaller reference publishers have low budgets for this activity and find it difficult to take advantage of what the Internet can offer. Another important opportunity for publishers is the ability to get closer to librarians and to end users, and to feed this interactivity back into improving the quality of their work. Finally, rather than seeing Wikipedia as a threat, there is no reason why publishers can't use Wiki technology to facilitate collaboration on the development of their content and

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services. Socially-produced information may be an excellent base-line input to an editorial process that could then produce a high-quality result.

# Online

By Jan Litton, University of Wales, Aberystwyth (Aberystwyth Online User Group). Please send your submissions for the next edition to jrc@aber.ac.uk

### Inderscience Journals Catalogue <http://www.inderscience.com/catalogue>

The 2006 Inderscience Journals Catalogue (now available) gives details of the 170 journals published in Engineering, Computing/ICT and Technology; Energy, Environment and Sustainable Development; Management and Business Administration; Healthcare, Sport and Leisure.

Inderscience have also started a free quarterly newsletter called HIGHLIGHTS, at http://www.inderscience.com/highlights featuring news, free trials, free articles, details of RSS, etc., with something special coming in February. Inderscience content (8,000 peer-reviewed articles) can be freely searched from http://www.inderscience.com/.

### CSA Illumina http://www.csa.com/pais

The complete PAIS Archive is now available through CSA Illumina. This is a retrospective database supplementing PAIS International and contains more than one million records. The initial release of PAIS Archive provided backfiles to 1937 and this release extends access back to 1915. These sources cover topical public and social issues and the making and evaluating of public policy. They are worldwide in scope and include publications in English, French, German, Italian, Portuguese and Spanish that deal with public affairs.

### CSA Research Databases <http://www.dialog.com>

Dialog are now offering an Alert subscription to the CSA research databases for customers in the corporate and government markets. Alerts subscriptions for the more than 30 databases of CSA scientific and technical research being added to Dialog will be available in coming months. These databases cover research in the fields of aeronautics, astronautics, engineering, environmental sciences, life sciences, materials, metals and alloys, space sciences, social/library sciences and technology, among others. When relevant new CSA research is added to the Dialog online service, the Alerts service will email the user.

### Dictionary of National Biography <http://www.oup.com/oxforddnb>

The Dictionary of National Biography has a new theme – reference groups. Articles explain the membership, aims, and influence of historically defined groups across all periods of British history. At present there are thirty groups listed varying from the Amateur Athletic Association to the Kit Kat Club to the Suez group.

### Edina <http://edina.ac.uk>

The Education Image Gallery has been updated for the current academic year and includes two improvements. So that users see the range of images available, fresh sets of images now appear throughout the service pages and every time a page is refreshed by a user, new images are displayed. The images represent the main subject areas