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# The Book of MPub

## New Perspectives on Technology and Publishing

The *Book of MPub* has been an evolving vision. Ten weeks ago, pressplay, our group of six Master's Publishing students, accepted the real-world technological challenge to publish a book-length collection of essays in electronic and print-on-demand formats. Over the semester, we have experimented with new technologies and explored the various publishing models that relate to them, ultimately documenting a state-of-the-art publishing project that serves to inform other publishers about the best practices for the production and marketing of single-source projects such as ours. We began with the best research papers in our PUB 802 course, Technology and Evolving Forms of Publishing and ended with The *Book of MPub* blog, ebook, downloadable PDF, and print-on-demand formats. The book includes the use of BookRiff, which allows custom BookRiff™ ebooks, and the Web to create their own book. The book is available in PDF, EPUB formats. All formats include an index, except for the blog, which is indexed through the categories tagged on the WordPress site. The print book serves as a physical artifact that has literal presence, both on shelves as well as in the hands of individuals who are interested in the MPub program. Our goal in producing a print version of the *Book of MPub* is to produce a tangible representation of information that we have learned and accomplished during our eight months in the Master's Publishing program. The *Book of MPub* is an important contribution to current publishing discourse and understands the esteem and authority inherent to print. The blog offers the currency that the print book does not offer—serving as a living, ever-developing document. The beauty of the blog is that it remains an ongoing conversation—we plan to keep the comment section open indefinitely. After our cohort has been capped and gowned, though, we graduate, a resistance lives on! Finally, the e-book format in EPUB and PDF—allows for more portability than the blog, and allows us the possibility of a wider audience. We have selected the best content for The *Book of MPub*—we took our cue from the infamous Google Book

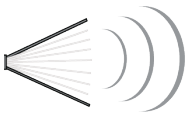


# *The Book of MPub*

*New Perspectives on Technology and Publishing*

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pressplay



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*To where we're from and where we'll go*

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# Foreword

**T**he *Book of MPub* began over lunch with Monique Trottier just prior to Christmas 2009. We were casually brainstorming ideas for the Spring 2010 Publishing Technology course for SFU's Master of Publishing Program, and Monique put her finger on an idea that worked on many different levels. Here was a self-contained project we could do on our own without needing to rely on anyone else's material, production schedule, or agenda—and yet could expand in whatever directions we wanted to take it. Here was an opportunity not just to write a book, but to edit a book, produce a book (in lots of different formats, natch), promote and market a book, and—most importantly—to build a network of people around it.

The predecessor to this book was *Book Publishing 1*,<sup>1</sup> an anthology of MPub project reports published by the CCSP Press in 2005. *Book Publishing 1* featured MPub internship research, and the project was staffed in part by MPub students (including design, copyediting, proofing), but it wasn't until last year—when that book served as the test content for our web-first XML production workflows—that we began to appreciate its role in showcasing not just what MPub students had to say, but how MPub students could also produce things. So with *The Book of MPub*, we thought, why not launch a project on this very idea and demonstrate what MPubbers are capable of?

Eighteen of the twenty-five parts herein began life as papers written for PUB802, a graduate seminar on Technology and Evolving Forms of

<sup>1</sup> *Book Publishing 1* can be found at

<http://www.ccsf.sfu.ca/ccsp-press/books/book-publishing-1>



Publishing. Each spring, MPub students are asked to write three short position papers responding to current issues and debates in the digital evolution of publishing. I challenge the students to take a stance and argue for a particular way of thinking, rather than merely reporting on what's already out there and what other people are saying. A position taken—even if rethought later on—is something that sticks with you over time, in a way that research and reportage cannot. A position taken has real value, even if it is ‘wrong’—being wrong is simply a step on the path to getting it right. Such is the path we take in the PUB 802 seminar.

Rowly Lorimer gave *The Book of MPub* its next critical push forward, in suggesting that we not only review the papers internally (as we do in the seminar course already) but to put them out to ‘open peer review.’ Of course this gives us the opportunity to bring *your* perspectives to bear on the material, and to thereby strengthen the positions taken in the papers. But also it allows us to build a network—and an audience—for the work. So here we take a cue from Sean Cranbury, Richard Nash, and a host of other contemporary thinkers who would advise us to begin gathering the community while the work is being written, rather than after it has been completed. Our experience bringing this network together around *The Book of MPub* has utterly amazed me. The willingness of our friends in the publishing industry—some alumni of the program, but mostly not—to weigh in on the topics discussed and to give wonderfully constructive feedback goes so far beyond what I expected. As we build an audience for this work, we also build a list of contributors which seems to grow daily.

*The Book of MPub* is an opportunity to show off technologically, too. The book was born in WordPress in early March this year. WordPress has served as our central repository, our editing base, and the nexus around which the community's attention, input, and discussion have been focused. Building the book's content on the Web, though, is central to the technological agenda which follows. Building on last year's Publishing Technology project—XML Production Workflows? Start with the Web—*The Book of MPub* is able to flow out to Adobe InDesign CS4 as XML, providing us near-automatic print production proofs, and the path to PDF and digitally-printed editions of the book.

Second, the web-based content leads directly to contemporary

ebook production, beginning with the EPUB standard. Since EPUB is essentially a website in an envelope, *The Book of MPub* is produced in digital reading formats automatically. Production proofing in both print and ebook formats began in early April, just a few scant weeks after the project was begun. By the book's launch in mid-April, our "agile" production path has been trodden dozens of times, with incremental changes at each iteration.

*The Book of MPub*, then, showcases the current discourse, the professional talent, and the technological innovation of the Master of Publishing cohort of 2009–2010. It is a work conceived, written, directed, edited, designed, and produced by our students. It shows not only what can be accomplished by a team of smart people working with their eyes open to digital possibilities, but also the immense power of the network of people that have made this year's MPub cohort what it is.

It has been my distinct honour to have worked with them on this project.

John Maxwell, Assistant Professor, Master of Publishing Program  
Simon Fraser University  
April 2010



# Introduction

*The Book of MPub* is an agile, collaborative experiment in publishing from the Cloud. It curates research and critical thinking from students in the Master of Publishing program at Simon Fraser University. In doing so, it makes a contribution to a collective discourse on innovative technologies in publishing—epublishing, new business models, and crowd sourcing and social media. *The Book of MPub* furthers discussion in three formats: blog, ebook and the classic, ever-evocative print form. The experimental process is itself research, and both documentation of the insights gained and the final product are comprehensive resources for the publishing industry at large.

*The Book of MPub* is one product of the 2010 MPub Technology Project course; the class also produced an editorial workflow system for small literary magazines and a redesigned program website. Short narrative accounts of each process make up the opening chapters of the book. These are followed by 18 papers written for a course in Technology and Evolving Forms of Publishing. These papers represent the state of technology, business models, and scholarship in the publishing industry in Canada in the spring of 2010.

The shift from print to digital media, always a fraught topic for publishers, informs all the papers, so it is fitting that we begin with a pragmatic discussion of epublishing and the special problems and opportunities inherent to it. Apple, Amazon, and Google figure prominently in the book: agency pricing, the Google Book Settlement, and the launch of the iPad loomed large in our collective field of vision as we wrote these essays. We embrace, debate, and derail the work

of ideologues like Cory Doctorow, Chris Anderson, Adrian Johns, Michael Tamblyn, and Kevin Kelly. We stock the collective publishing toolbox with papers about software, workflow solutions, and business models designed to take advantage of digitization. *The Book of MPub* delves into issues in journalism as, with the advent of social media, crowdsourcing, and aggregation, it undergoes a radical transformation. We end with a look to the future and the issues of intellectual property and the ethics of copyright.

# Project Summary

## The Book of MPub

**T***he Book of MPub* has been an evolving vision. Ten weeks ago when the technology projects first began, pressplay, our group of six Master of Publishing students, accepted the real-world technological challenge to publish a book-length collection of essays in electronic and print-on-demand formats. Over the intervening weeks we have experimented with new technologies and explored the various ambiguities and unknowns that relate to them, ultimately documenting a state-of-the-art publishing project that serves to inform other publishers about the best practices for the production and marketing of single-source projects such as ours.

We began with the best papers in our PUB 802 course, Technology and Evolving Forms of Publishing, and ended with *The Book of MPub* blog, ebook, downloadable PDF, and print-on-demand formats. The POD option includes the use of BookRiff, which allows customers to “riff” on the papers, other books, and the Web to create their own book. For the ebook, we exported into both PDF and EPUB formats. The print version includes an index. The EPUB and PDF versions are searchable, as is the blog, which is also indexed through the tagged categories.

The print book serves as a physical artifact that has literal presence, both on shelves as well as in the hands of individuals curious about the MPub program. Our goal in producing a print edition of *The Book of MPub* is to produce a tangible representation of the information we have learned and the work we have accomplished during our eight months in

the Master of Publishing program. *The Book of MPub* is an important contribution to the current publishing discourse and thus it commands the esteem and authority inherent to print.

The blog offers the currency that the print book does not by serving as a living, ever-developing document. The beauty of the blog is that it remains an ongoing conversation—we plan to keep the comment section open indefinitely—so that it can be updated and added to even after our cohort has been capped and gowned.

Finally, the e-book format—in EPUB and PDF—allows for more portability than the blog, and allows us the possibility to reach channels and audiences in a new realm of reading.

### **Selection**

To select content for *The Book of MPub* we took our cue from the infamous Google Book Settlement and provided each MPub student the opportunity to “opt-out” of *The Book of MPub*, otherwise publishing the best paper from each of the individuals willing to participate. This opt-out approach then informed the rest of our decisions—from paper selection, to creative commons licensing, to the editorial process—as we embarked on publishing a book on an accelerated, magazine-like schedule. Several weeks in and three opt-outs later we drank wine, took stock, and realized the book had two registers: (1) to showcase the high calibre contributions to the publishing world that each student had to offer, and (2) to serve as a kind of yearbook of our graduate year. Verily, it was decreed that *The Book of MPub* would include 18 papers authored by each of the 2009–2010 MPub students, and the papers would be taken from the 36 essays written for our Technology and Emerging Forms of Publishing class. In the end, all 18 students agreed to be part of *The Book of MPub*.

As a result, the book includes the best of the first two technology papers written by each student. The preferred paper was determined by input from the authors and editorial recommendations from both pressplay, and our winsome project supervisor John Maxwell. In many cases, John expressed to authors that it might be a good idea for them to switch papers to ensure a broad and comprehensive representation

of publishing technology. John's hawk-like, nay, *panoptical* editorial eye was instrumental in helping us build a better book.

## Editing

We decided upon a three-stage editorial process: first, developmental editing, then copyediting, and finally, proofreading. We rotated papers, so that each paper had the benefit of at least three different pairs of eyes throughout the process. The developmental editors were also responsible for making initial contact with authors, selecting which of their two papers would be published, posting the paper to the blog, and licensing it with a Creative Commons Attribution-Noncommercial Licence.

Each paper received substantive edit—in collaboration with its author—by this initially assigned editor. Each substantive editor identified “key word” lists that were subsequently used to generate the print index and to add SEO tags to *The Book of MPub* blog. Proofreaders caught typos and format errors in an InDesign layout that was generated from the blog.

To further deepen ties with our industry friends, we posted a couple of the essays to Book Oven's Bite-Size Edits collaborative editing website. Although the short editorial timeline prevented us from using the edits received from the site during our actual edits, our intention in using Bite-Size Edits was not only to promote Book Oven in this way, but also to find yet another avenue to distribute *The Book of MPub* to a broader, larger audience.

## External Comments

Each author, after selecting the paper they wanted published, revised their papers according to the feedback they received from their assigned peer reviewer and from John's initial comments. After these revisions were completed, and licences were approved and registered, all papers were posted to the WordPress blog along with the comments from Thinkubator. Where comments were no longer relevant or accurate (in the case of some papers revised based specifically on these comments) the outdated comments were not included on the blog.



We sent personalized, tailored invitations (with links to papers that spoke to their specific interests) via email to greater than 40 outside contributors (industry guests, notable alumni, and faculty members) to read and provide feedback posted to the blog. The response and level of enthusiasm from these commenters—over 100 comments in just under a month—was both dizzying as well as gratifying—we wanted at least three pairs of eyes, and ended-up with 50.

### **Production**

Simultaneously with the developmental editing stage, other content was generated and added to *The Book of MPub*, pressplay created introductions for each paper using both excerpts from the paper itself as well as comments from our blog contributors; these introductions appear along with short author biographies preceding each paper. Acknowledgements were compiled and included. pressplay intended to index the papers by tagging terms in WordPress, then following up with InDesign tags, but in the end this automated transfer from blog to layout was unworkable. In the final stages of production, the index was generated manually, and text was proofread to ensure consistency of style throughout the book. For the front matter, John added a context-establishing foreword, pressplay wrote an introduction to the book as a whole, and we included project summaries for all three project groups. The final content was then exported as clean XHTML from WordPress, and fed semi-automatically into both print and ebook production environments. Thus, print and ebook proofs could be generated and regenerated numerous times as the book reached completion.

### **Marketing, Promotion, and the Launch**

Part of our goal was to distribute *The Book of MPub* to individuals outside of the program in order to publicize MPub activities and to establish awareness of this program within the publishing landscape. We needed to find a way to get people to care about our work and to encourage distribution of the book in its three forms. To this end we embarked on a social media campaign, by creating Twitter and Facebook

accounts. We tweeted and updated our Facebook fan page status each day and sometimes several times a day with provocative quotations from the papers selected from *The Book of MPub*. We also tweeted quotations from the blog comments received and drew attention to any publicity we received from the industry.

Contacting industry guests, experts, and alumni was also considered part of our marketing strategy as we promoted the launch in our correspondence. Industry guests, experts, and alumni are our vectors out to the larger community and their involvement—through their comments, feedback, and word of mouth—helped enhance the reputation of both MPub and *The Book of MPub*. To them we are deeply indebted.

pressplay members: Vanessa Chan, Cari Ferguson, Kathleen Fraser, Cynara Geissler, Ann-Marie Metten, Suzette Smith

<http://www.cbsp.sfu.ca/bookofmpub>



# Project Summary

## netCase Editorial Workflow System

NetCase is a group of information architects from the Master of Publishing program who worked on producing a simplest-possible, task-oriented, and flexible editorial workflow system using the WordPress platform. The ultimate goal—articulated in our motto, *over the transom onto the Web*—was to replace the paper submissions system used by so many small magazine publishers.

In order to be free, open-source, and flexible with a simple user interface, the editorial workflow system was built on the widely used platform WordPress. WordPress is an intuitive (task-oriented) and easy-to-use blogging and web content management platform that has the flexibility and openness required to design a usable, easily adoptable system. WordPress allows users to customize their sites with a multitude of plugins, many of which streamline the editorial process. WordPress is a widely accepted platform, can be downloaded in minutes, and is nearly ubiquitous with web-hosting providers. The legion of developers behind WordPress are constantly updating and improving its software. WordPress is a ubiquitous fixture in online content management systems, from CNN and NASA to personal blogs, millions of websites (from obscure to well-known) are adopting this flexible software. WordPress was unanimously chosen as the most appropriate system to build the netCase editorial workflow system.

To accomplish this feat, netCase started with background research on editorial workflows, moved into wireframing their basic system,

and eventually got their hands dirty working with a live content management system. Their workflow prototype is aptly named nEWS—netCase Editorial Workflow System. The process of creating nEWS was punctuated by testing sessions with magazine industry professionals who provided valuable feedback that helped the system reflect the realities and needs of small publishers.

Although most workplaces have “gone digital” in order to make their businesses more efficient, many small magazines are still relying on paper submissions and inefficient editing processes. netCase focused on these publishers as our audience and the ultimate users of nEWS. To keep it simple, netCase created our system to address submissions to a collaborative editing environment (in which submissions are rated by a collective of readers and edited by multiple editors), with options to allow for individual publishers to build on the system and add roles to address their specific needs. nEWS considers the small magazine’s editorial process from three perspectives: the writer who submits work online, the reader who receives these submissions and attributes a personal rating to the piece, and the editor who moves the accepted pieces through the editorial stages to final approval. netCase took into consideration various types of writers (e.g, first-time contributor, regular contributor, commissioned writer) as well as different types of editors (i.e., those working remotely versus those working in-house, and copyeditor versus managing editor, etc.), not to map out defined roles, but to explore various user needs in creating an uncomplicated system that is accessible from multiple points of view.

While an online submission and editorial system could lead to faster editorial “turn-around,” most editorial workflow systems do not appeal to small magazine publishers, as they are frequently complex, inflexible, expensive, and difficult to implement. netCase aimed to circumvent these obstacles by staying simple and catering to the most fundamental needs of the authors who submit and the readers and editors who receive and publish work. Our approach throughout was to define and research our project in a broad sense before narrowing down to concise, specific, and obtainable goals. After developing our background knowledge and expanding on the functions of an editorial workflow system, we

narrowed it down to the simple tasks that our nEWS needed: submitting, accepting/declining, and editing.

By sketching and testing wireframes, netCase created a straight forward workflow and eliminated much of the unnecessary complexities early in the process. We were able to avoid superfluous steps in the editorial process and, in working with magazine editors from *SubTerrain* and *Geist*, were able to get a realistic idea of what an editor actually needs.

netCase's wireframes addressed submissions, declinations, and the resultant editorial steps that occur once a submission has been accepted into the system. The nEWS wireframes took a submission through all stages of the editorial workflow, which was represented by four status levels: Pending Review, Declined, Accepted for Editing, and Ready to Publish. We then took our wireframes and began working in our live, WordPress content management system.

To create this environment, netCase built a system in WordPress that is supported by various WordPress plugins, each with their own role in supporting the workflow and users. netCase manipulated the functions of these plugins to label pieces of writing in nEWS with multiple statuses and to enable different roles and levels of authority for our users. Readers were given the ability to rate pieces of writing without making edits or changing the status of a document. It was important to find a balance between creating roles (author, reader, editor) without creating rigidity in the system. This was achieved by using plugins that remove extraneous abilities (viewing the dashboard and editing and deleting already submitted pieces of writing) from an author and giving more flexibility to the editor.

In developing nEWS, netCase focused on creating an easily adoptable system that causes minimal complications during implementation, and requires little-to-no training for its users. They concentrated on small publishers who are still working with paper submissions and whose current editorial workflows suffer from rigidity and complexity. By focusing on creating the simplest-possible, task-oriented editorial workflow system, netCase created an intuitive prototype system that can be easily implemented and can function in multiple editorial contexts. nEWS is an easily adoptable option that causes minimal complications

during implementation, and requires little to no training for its users. And while nEWS is still a prototype, netCase is hopeful that it will soon become a reality for small magazine publishers.

netCase group members:

Kelsey Everton, Kristen Gladuik, Elizabeth Kemp, Eva Quintana Crellis,  
Shannon Smart, Chelsea Theriault

<http://www.cbsp.sfu.ca/editorial>

# Project Summary

## A Revised Program Website

After five years of working on a wiki platform, the Canadian Centre for Studies in Publishing (CCSP) is moving to WordPress. Our group, Pangolin Productions, was assigned the task of taking the existing CCSP website, stripping it to its essential elements (content, information architecture, stylesheets), and recreating it in WordPress-MU (the multi-user/multi-blog version of WordPress). This was an exercise in repurposing existing elements and content planning.

In the beginning of this project we had three online spaces with which to contend: the CCSP website, the Thinkubator blog and the class wiki workspaces. The CCSP website served as a brochure for the Master of Publishing program (MPub), the Summer Publishing Workshops, the minor in publishing in the communication department of SFU, and CCSP research, activities, and services. The Thinkubator blog displayed the latest news and opinion on the publishing industry. It is currently a recognized brand among those in the publishing community and was the key landing page for visitors in the industry. It was important to Pangolin and to MPub technology project advisor John Maxwell to preserve this part of the CCSP's identity and give it prominence in our final product. Finally, the class wiki pages for MPub students served as a workspace and a repository of course content. The three parts of the CCSP online presence—the website, the blog, and the student workspace—were branded disparately and required integration.

The goal of our project was to make the new CCSP web presence



functional and straightforward, as well as easy to edit and update. The final product should increase the online presence of the MPub program, drawing in future students, and building a community of publishing industry experts, alumni, SFU Faculty of Communication, Art and Technology (FCAT) department peers, and faculty. We wanted a website that could grow with the output of the CCSP student body, faculty, community—past, present, and future—and CCSP Press.

Our project began by defining the audiences for the future CCSP online presence. They include prospective students interested in the Master of Publishing program; current MPub students; MPub faculty members; and publishing industry professionals and alumni of the program who are interested in CCSP activities.

To serve these audiences, we identified objectives and strategies to achieve them. We considered unconventional design solutions but balanced those aims with the need to make the site easy to navigate. The aesthetic decisions were made after carefully considering the best use of information architecture for the website. We looked to use textual and visual clues to direct users to the information for which they were searching. Using wireframe models and paper prototypes, we conducted extensive interviews with members of all the stakeholder groups and tested our strategies. The user experience we considered in our design included consumers and contributors. Making the website easily edited and updated by faculty and staff was also paramount in our design decisions.

It was also important to make it simple for those interested in publishing education to easily locate the new CCSP website and information on the Master of Publishing program. Ultimately, if the project is successful, we anticipate that the number of applicants into the MPub program will increase. Through keyword optimization we aim to bring in more applicants who are searching for things such as publishing programs, publishing education, and other phrases that potential applicants may use in their searches. We also included new forms of media such as podcast testimonials and other videos to increase the interest of prospective students. Additionally, by better organizing content on the MPub program, prospective students will have a much

more intuitive experience that will leave a lasting, positive impression of both the website, and of what CCSP has to offer.

Another goal for Pangolin was to increase the visibility of CCSP activities, including student research, blog posts, and CCSP Press publishing, and to publicize that content through social networking sites. For example, we use the TKBR Twitter feed to push content from the website and onto Twitter with the aim of sharing the output and research from the program. This project establishes spaces for more dynamic content on the website—specifically through the TKBR blog. By developing processes to curate content for TKBR on a more frequent basis, we hope to improve the Google search rankings for the site through search engine optimization (SEO), and encourage all visitors to return to the website regularly.

Remaking the website was an opportunity to re-evaluate its content, to look at the school's branding, and to establish an online relationship with the FCAT.

Pangolin Productions members:

Chris LeBlanc, Tamara Grominsky, Tracy Hurren, Megan Lau,  
Katerina Ortakova, Emma Tarswell

<http://tkbr.ccsp.sfu.ca/>



# How Do You Solve a Problem Like the Ebook?

KRISTEN GLADIUK

Ebooks are a divisive topic, and one at the forefront of both publishers' and readers' minds. Kristen Gladiuk tackles the three central issues: ownership and digital rights management (DRM), sharing intangibles, and packaging digital products. In spite of these tangles, Kristen is optimistic about digital formats, and many in the industry at large share her views. "I consider myself to be very much in the grey area between traditional-book-lover and eager-e-book-adopter," writes Shannon Emmerson. "A little more patience and creativity is probably required to solve the immediate problems, but there are certainly opportunities galore." This article outlines these opportunities, setting the stage for *The Book of MPub's* discussion of technology in publishing.

*After abandoning her dreams of being on Saturday Night Live, born and raised BC girl Kristen Gladiuk returned to her first loves—books and writing. She is a blogger (at [kage-g.blogspot.com](http://kage-g.blogspot.com)), wannabe designer, digital media enthusiast, and self-professed lover of all things print.*

KEYWORDS: EBOOKS, DRM, DIGITAL RIGHTS MANAGEMENT, FAIRPLAY, E-LIBRARY

THE COMPARISON BETWEEN ebooks and print books is a touchy subject for some, and wavers depending on whom you're talking to. From my research, I have gleaned that there is a camp of radicals on either end of the argument: the "it's not the same trying to read a book on a little screen" group, comprised mostly of romantics who cannot separate content from form (Technology Blog 2010); and the group who favours the "instant gratification" that digital offers, and wants their entire library at their fingertips (Sorenson 2010). In between lies a group whose minds are yet to be made up—some people can recognize the convenience of an ebook but are put off by its other shortcomings. I have been steadfast in the print-book group, perpetually concerned that my hardcovers will be subverted by ebooks and that my shelves will go dry and wither away. However, my position in this paper leans more to the centre, trying to find the *je ne sais quoi* that is lacking in ebooks that could help them find their own form and aesthetic. Addressing and improving the poor qualities in ebooks could help them develop as their own entity and, in the process, win over dedicated bibliophiles like myself.

I have nailed it down to three factors that are slowing ebook adoption: the absent sense of ownership that comes from using digital rights management (DRM); the lack of useful methods for showcasing and sharing a collection of books; and the nonexistent packaging and presentation. Using DRM on ebooks puts immediate constraints on where, how, and with what device someone can read. Not only are they limited in their reading experience, but they also have a limited (or absent) capacity to share that title. If I could stack my ebooks in a virtual library and share them with my friends via the Web, it would create an experience akin to the tangible nature of print books. A digital repository with some flair and innovation would give ebooks a second life. There are plenty of good reasons we keep our books after we read them—and among those reasons are to show them off and to lend them out. A digital bookshelf would cater to both of these needs, and would add to the sense of ownership that people (especially print lovers) crave. However, before creating a bookshelf, ebooks need a serious facelift. The old adage goes, *don't judge a book by its cover*, but what if your ebook has no cover at all? Some ebooks are sold coverless,

broadcasting a message of inferiority to their print counterparts (Daly 2010b). Not all print books are created equal in the sense of design, but I would be shocked to find a naked print book on the shelves of any store. Remedying these three issues in ebooks would give them an advantage in the ongoing print vs. digital debate and bring the standards of ebooks closer to those of their print counterparts.

With rumours swirling of Apple using FairPlay on their iBooks (Pham 2010 and Schramm 2010), it's hard to ignore the DRM debate—to lock them up, or to not lock them up? Or as I see it, to sell books, or to license books? Someone needs to create a sense of ownership so that readers don't feel like they're licensing a story, but like they possess a book. Ibis, whose mantra is “you bought it. Why shouldn't you own it?” (Ibis 2010), is an emerging digital reading system that could fulfill this need. The egregious lockdown of ebooks is the most ironic feature of all. Defenders of the ebook claim its digital form is the ultimate quality in a book: an entire library can be accessed from anywhere. But DRM limits reading an ebook to one device (Digital Rights 2010). If the miracle of ebooks is their portability, why is this one of the biggest points of debate? Chelsea Theriault, a student in the Simon Fraser University MPub program, made a poignant query in this vein: “What's the point in DRM if it exists only to restrict what may be an e-book's sole redeeming quality?” (2010). I can lend my print books to whomever I please and stack them on whatever shelves I want. If I move into a different house, my books are not in jeopardy, but if I buy a different ereader, I could lose my entire library. Wikipedia notes the restrictions of Apple's DRM: “FairPlay also limits content to strictly Apple devices, so (again, depending on implementation) it's a fair guess to say that any books you purchase on the iPad won't be usable on any other device” (2010).

Could using FairPlay on iBooks be a ploy by Apple to dominate the ereader industry and increase their product sales? If FairPlay dictates that your iBooks can move freely only between Apple devices, they may be using their DRM more as a tactic to draw people to their products and less to protect the proliferation of pirated books. This theory assumes, maybe unreasonably, that people will flock to iBooks. But the idea of Apple obliquely drawing consumers to their products with their FairPlay DRM is not inconceivable. In a remark on the Amazon Kindle,

Steve Jobs, Apple's CEO, said that "it doesn't matter how good or bad the product is, the fact is that people don't read anymore. Forty percent of the people in the U.S. read one book or less last year. The whole conception is flawed at the top because people don't read anymore" (Beschizza 2010). Considering this opinion of reading, Apple's focus may not be on ebook revenue and eradicating book piracy, but rather an aim to get iPads and iPhones and iAnything into the hands of everyone. To Apple, iBooks are just another component in their business model that will encourage more users to adopt Apple technology. I argue that freeing iBooks of DRM would create the same mass movement towards Apple devices and iBooks. People want to own their books, and if Apple were to grant the privilege of truly owning an ebook the public would respond.

Without the DRM/FairPlay barrier, the sense of ownership that comes with a print book is mirrored in ebooks; readers are granted *real* ownership. Ibis Reader has the potential to achieve this goal. Their upcoming digital reading system boasts "no user restrictions of any kind" (Daly 2009). Their practice is exactly what their motto stated—you buy it, you own it. Giving readers genuine proprietary rights to their ebooks opens the doors to more than just piracy (the cynic's word for invaluable word-of-mouth marketing), it gives readers the option to share their ebooks in the same spirit in which they would share a print book. The arguments for and against DRM can be complex, but the answer is quite simple: just get rid of it. And by doing just that, Ibis Reader gives ebooks true portability and gives readers unrestricted access. It delivers the instant gratification that digital reading purports to offer and crumbles the barriers to use.

With the ability to share comes the need to showcase. The digital bookcase, or e-library, is a sharing and showcasing feature that could embed itself in twenty-first-century culture and become a fundamental part of digital reading. Providing a venue in which readers can display their books brings an element of the print experience that is lacking to e-reading. For many readers, their bookshelves act as trophy cases, and without a digital repository for their ebooks, an important social aspect of reading is eliminated. Another way to think of the digital library is like a virtual coffee table: a place for readers to display the books (and

magazines) they want to talk about and are eager to share. Due to a lack of innovation in this realm, currently, the most impressive foray into digital shelving is by Apple, who unveiled their digital bookshelf with the introduction of their iPad and iBooks (Van Grove 2010). Although their shelf is little more than a visual rendering of the bookcase in your living room, it is the first step towards a digital ebook library. Displaying your ebooks by cover rather than just listing them by title also embraces the idea of developing ebook packaging. It shows that ebooks should *look* a certain way. However, locking up iBooks eliminates the sharing aspect and makes their bookshelf nothing more than a snapshot of books glued to a panel of plywood.

Goodreads is a free online site that uses digital bookshelves as a social networking tool for bookworms, with minimal integration of ebooks (GoodReads 2010). You can start a digital library, rate your books, and check out other people's shelves, all without purchasing books online (although there is usually a link to purchase at Amazon). It's more of a tool for showing what you have been reading (like using a bookshelf widget on your blog) and making recommendations to your Internet friends. LibraryThing is another online tool that uses the bookshelf idea, but like Goodreads, it focuses on cataloging your print books (LibraryThing 2010). These sites are effective at recommending books, but they lack the ability to share. However, a set-up that fused this social networking quality with an ereading system like Ibis would be ideal because it could offer the option of exchanging books, not just recommending them. When I asked Liza Daly of Ibis Reader (on her *Threepress Consulting* blog) if Ibis planned to build a bookshelf feature, she responded that they would be "releasing an early version of a more visual display of your books pretty soon" (Daly 2010a). If their visual feature is successful, it could achieve a new level of interaction for digital reading. Offering the same kind of perusal and exchange that happens with print bookshelves would bring a new dimension and convenience to the ebook experience.

Before ebooks are shelved, however, we need to consider their appearance. Liza Daly says that "e-book buyers are very disappointed to find that their editions include no cover, a text-only cover, or an unsightly generic cover" (Daly 2010b), thus creating a divide between



the expectations of print and digital. It's one thing to show a JPEG of the print cover on a digital shelf, but the actual ebook should also have a cover. While it's natural to have disparities between print and digital, basic features like the presence of a cover should be equal across the board. The point is not for ebooks to imitate print books, but to embrace proper packaging and presentation that will bring them closer in line with print standards. Looking up ebook covers on the Internet results in a staggering number of "Create your own e-book cover" offers, which is indicative of the numerous naked ebooks looking for some shelter. Providing a proper cover for ebooks also adds to the reader's sense of ownership. Design is an element of books that has purpose, and that is a part of the price. Buying a book without a cover gives buyers the feeling they have purchased something incomplete or substandard and that doesn't have the same intrinsic value.

While books are the subject of a print-digital tug-of-war, ebooks need to reflect the same standards of quality seen in print books before they truly proliferate and win over the hearts of readers like me. Drawing from successful aspects of the print experience (ownership, sharing and packaging) and appropriating them for ebooks will not take away from the novelty of digital formats, and it may open doors to new ideas. Digital bookshelves take the idea of sharing and translate it to an online/digital model that is different from the print experience. The question isn't whether or not ebooks can be a digital equivalent to print books; it's whether they can be as good. Ebooks don't need to create a digital representation of the print experience, they need to find their own position in the market and in the eyes of readers. If these faults can be improved, ebooks could carve out a unique identity and experience and persuade some print-lovers to start e-libraries of their own.

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# E-textbooks and Content Delivery

SUZETTE SMITH

While the trade ebook issue hinges on reader experience, e-textbooks are a different beast. Academic publishers need to balance the access needs of the user, the delivery needs of the library, and the customization needs of the instructor; as the Joint Information Systems Committee (JISC) National E-books Observatory Project Final Report shows, it's hard to be all things to all people. SFU librarian Nina Smart points out that publishers remain concerned that digital sales will cannibalize, not complement, sales of print books. Suzette Smith explains how academic publishers are harnessing technology to meet these needs and turn a profit.

*Suzette Smith escaped from a sales life to her true calling: publishing. When she's not reading, writing, or thinking of ways to improve educational publishing, she spends her time singing, listening to music, and dreaming about her imaginary cat.*

KEYWORDS: E-TEXTBOOK, TEXTBOOK PUBLISHERS, ACCESSIBILITY, CONTENT DELIVERY

E-TEXTBOOKS—EDUCATIONAL AND INSTRUCTIONAL books in digital format—are changing the nature of educational publishing. They are modular, customizable, searchable, interactive, portable, more environmentally friendly, and less expensive. Additionally, through hyperlinks they offer instant access to multiple forms of content, as well as the same quality and access to international and distance-learning resources. The transition from print format to e-textbook format is not—as I examine throughout this essay—without its challenges. Drawing on the results of several user studies, as well as presentations from the most recent O’Reilly Tools of Change for Publishing Conference, this paper provides an overview of the current state of e-textbooks in the higher-education market. Considering the needs and challenges of the end user (students and libraries), I make recommendations for how publishers might best deliver e-textbook content to users. Specifically, I argue that if textbook publishers were to adopt a standard format for reading content, open access to library use, and less restrictive price points, then textbook publishers could spur growth in the e-textbook market.

### **Standard format for reading content**

E-textbooks are available in abundance. Many textbook publishers such as McGraw-Hill are transferring nearly 95% of their print material into digital (Catone 2009). CourseSmart, a joint e-textbook venture between many of the largest higher-education textbook publishers, offers more than 9,200 digital files for over 1,000 courses across most academic disciplines (The Future of Digital Textbooks 2010, 16). Availability, notwithstanding, e-textbooks are not widely adopted because they lack a standard format for users.

There is a myriad of devices and ebook readers; however, many are not interoperable (Biglione 2010). While EPUB is the emerging ebook standard for publishers, the Kindle, with its large customer base, does not support it. Also, while EPUB is in the iBookstore, Apple employs a different digital rights management (DRM) than everyone else, and it can be used only on Apple devices. The new iPad does not support Adobe Flash—an integral feature for e-textbook users who need this rich media content to enhance functionality. Buying proprietary software

to download e-textbooks that might not work on e-reader, Mac, PC, or smart phone devices is a significant discouragement for e-textbook users. Amazon's Kindle has its own DRM software, whereas Apple owns both vendors and devices; alternate ebook vendors are served by Adobe's ContentServer and a given file cannot move from one system to another. Within the academic community, there have been objections to these practices and professors have demanded that textbook publishers create a standard file format that will work for all devices. In response, the publishing house Macmillan has launched a new digital publishing platform called DynamicBooks, which is powered by VitalSource—a leader in digital book technology.

The greatest feature of DynamicBooks is its customizability. It can produce multimedia textbooks for ereader platforms and allows professors to edit textbooks as they deem appropriate. This digital textbook package includes online access, a downloadable version, and an iPhone application. Additionally, students “can annotate or highlight and search terms or their notes in their DynamicBook and can print from within the application. Bound printing will be fulfilled by Ingram Content Group ... with printed, bound versions also available in either black-and-white or in colour. Students can order these books from retailers such as Barnes & Noble, Amazon and Follett” (Esler 2010).

McGraw-Hill, a pioneer in customizable print textbooks since the 1980s, announced its own format for enhanced, interactive e-textbooks called Connect (Young 2010). Pearson's Custom Solutions is another option, and John Wiley & Sons started a similar interactive format named WileyPlus. For many, there is a very real fear that such competition will turn into a format war that will not serve the e-textbook audience very well. In an unlikely move, however, Macmillan extended an invitation to all its competitors to upload digital copies of their textbooks to DynamicBooks at an 18% markup. To date, none of Macmillan's competitors have accepted this offer, but there is still time. If the competitors were to accept this offer and collaborate on a standard platform, then the format wars might finally reach a *détente*, supplying users with portability.

## Libraries

In 2009, the JISC released the results of a two-year study of post 16 and higher-education research in the United Kingdom. The extensive study reveals key findings about e-textbooks and access that textbook publishers would be wise to consider. The 52,000 respondents conveyed that e-textbook users prefer an open and flexible mode of content delivery, but that textbook publishers do not embrace such a mode (JISC 2009). Nearly 65% of UK teaching staff and students had used an ebook to support their studies, and more than half of these users said that the last ebooks used were provided through their libraries (JISC 2009, 5). In the United States, some 97% of academic libraries already have some ebooks (Biba 2010). Libraries are therefore a key customer and provider in the market for ebooks and, by extension, e-textbooks.

The study also concluded that e-textbooks are used as backups during peak periods when the print book equivalents are checked out or unavailable rather than as a direct substitution for the print book. Their use is highly seasonal and varies by 50% monthly between the beginning and end of term in accordance with peaks in the teaching and academic calendars. Use of e-textbooks also appeared to be based on convenience because almost one-third of pages were viewed off-campus and 24 hours a day.

Contrary to textbook publishers' beliefs, e-textbooks were mostly used for quick fact extractions and not for continuous reading. This is the result of e-textbook platforms being difficult to access and barely serviceable. Other technical barriers include limitations on printing, downloading, and slow speeds. Librarians found e-textbook business models cumbersome due to complex licences and high prices. The study also indicated that users wanted a more standardized online experience because they were confused by the inconsistent experience of the delivery of digital content for their studies. This might all change, the studies said, if publishers work with Google exclusively to index their content, or at least make all content available through Google (JISC 2009, 6).

## Pricing

There are problems in determining price points for e-textbooks. The same considerations that encourage publishers to use DRM to protect their content inform their reluctance to reduce the retail price of e-textbooks. For instance, CourseSmart sells PDF versions of popular textbooks downloadable only online through 180-day subscriptions. The price for Lamb, Hair, and McDaniel's ninth edition of *Marketing* is \$80.99, discounted slightly more than 50% from the list price for the print textbook sold at \$176.95 (Guess 2008). CourseSmart's discount is questionable because, unlike the textbook, the user no longer owns the e-textbook after a time. Based on CourseSmart's prices, the acceptable e-textbook price point appears to be roughly half the list price of the printed book. According to an article by Jeffrey Young in *The Chronicle*, DynamicBooks "will be sold at less than half the price of the printed versions" (Young 2010). The reaction of dominant textbook publishers now that DynamicBooks plans to undercut its competitors' established price point remains to be seen.

In a presentation entitled "The Future of Digital Textbooks" at the TOC for Publishing Conference on February 23, 2010, it was estimated that the total digital revenue in the higher-education market is just under US\$100 million (The Future of Digital Textbooks 2010, 5). The TOC presentation points to Flat World Knowledge, an \$11 million start-up company that uses an open business model. Flat World offers openly licensed, free online e-textbooks and low price points for print books. Students can buy a PDF download of a book or a POD version of a chapter for \$30 black-and-white and \$60 coloured for the print version. The model also uses Creative Commons licences and custom tools to modify and remix content (The Future of Digital Textbooks 2010, 10). Textbook publishers shy away from this Flat World model of open content because they fear that pirated copies will circulate widely and tap into their profit margins. However, it is only in delivering content in an open, seamless way that more users will opt for e-textbooks. Flat World demonstrates that delivery of content can be done using an open model while making profitable revenue at the same time.

Once e-textbook publishers begin with standardizing content



delivery in this open access method, then they will find that content delivery concerns of e-textbook users of libraries and advocates for low e-textbook prices will be easier to address, ultimately leading to expansion of the e-textbook market. Textbook publishers should strive to deliver e-textbook content in an open access, user-friendly way that will benefit both the textbook publishers themselves and the e-textbook users. When it comes to e-textbooks, publishers must adopt principles of user-centred design and delivery to expand their share of the market. Indeed, the publishers who best embody the principles of user-centred design and delivery will rise to the top and claim victory.

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# Maybe Not So Easy-Peasy: The Shift from “P” to “E” Catalogues

CHELSEA THERIAULT

Kristen Gladiuk and Suzette Smith have illustrated how publishing is revolutionizing the industry on the product end, but how can the benefits of digital formats be applied to back-end media? Chelsea Theriault deftly summarizes the benefits and limitations of e-catalogues. These sales tools in a new format “are being designed to be used by [sales] reps,” Julia Horel-O’Brien notes, and making the best use of them “requires a good rep [who knows] what works best for each bookstore.” Theriault’s article reinforces the notion that digital tools work best as extensions to, not replacements for, human expertise.

*Chelsea Theriault is a consummate MPubber, expert bookseller, regular globetrotter, and proud pug owner. She’s looking forward to Publishing 3.0, which should be easy-peasy lemon squeezy as long as we survive 2012.*

KEYWORDS: PRINT, DIGITAL, SUPPLY CHAIN, CONTENT MANAGEMENT SYSTEMS, CATALOGUES

COMMON PRACTICE IN the book industry supply chain is as follows: bookstore managers sit at tables strewn with publishers' catalogues, tacking Post-its next to titles that they think will sell in their stores. Later, these managers meet with their colleagues or with a wholesaler's sales rep, and they discuss which upcoming titles to order while flipping through the catalogues. The rep or the store's designated buyer then puts the order through an online ordering system.

Automated ordering makes this comparatively inefficient. Aside from data limitations (there's only so much room on a page), details that influence a book buyer's decisions (such as price, release date, and cover design) may change after a catalogue has been printed. Paper catalogues are also not environmentally sustainable, and their printing and distribution is yet another cost to publishers who are already struggling with low profit margins. There is an alternative, however: e-catalogues, which eliminate these inefficiencies and lay the ground for new opportunities. E-catalogues can be updated easily, accommodate detailed bibliographic and sales data, have a smaller carbon footprint, and are cheaper to produce and distribute (once initial set-up costs are out of the way).

While e-catalogues appear superior on paper, in practice they have been slow to catch on with publishers due to their deficiencies. By analyzing the shift from "p" to "e" catalogues as it occurs throughout the supply chain—from publisher to rep to buyer—I'll demonstrate that the e-catalogue's deficiencies are far from insurmountable. In fact, they are quite worth overcoming, especially since customizable ordering databases like BookNet Canada's forthcoming CataList (Catalogue 2.0), will smooth out any remaining issues.

### **Publishers: The Big Cheese**

Publishers have previously experimented with e-catalogues on disks, as PDFs, or as web-based supplements to the print version, but HarperCollins is leading the pack in moving to an e-catalogue-only system (Crum 2008). In May 2008, HarperCollins announced its plans to develop "an interactive, electronic sales catalog, the most advanced catalog available from a major publisher" for its US arm (HarperCollins

UK and Canada still primarily use paper catalogues) (Crum 2008). The site was up and running in early 2009, replacing paper catalogues completely for Fall 2009. HarperCollins's e-catalogue is a content management system, allowing real-time updating through interlinked data systems, with ordering built in and the entire backlist available for the buyer's perusal.

While HarperCollins's full-featured e-catalogue has improved remarkably on its paper catalogues, it also has a glaring downside: what Rachel Deahl from *Publishers Weekly* astutely terms "PR-like bells and whistles" (Deahl 2009). Since a catalogue is fundamentally a selling tool, a digital platform gives publishers way more opportunities to sell themselves and add unnecessary elements to the buying process. HarperCollins can now put reviews, interviews, and promotional videos in their catalogues, which may or may not help boost a particular book's profile, but ultimately just draws out a process that should be as simple and practical as possible. In a presentation about HarperCollins' e-catalogue transition at Book Industry Study Group's "Making Information Pay" conference in June 2009, President of Sales Josh Marwell noted that a major benefit of e-catalogues is "time savings in the selling/buying process" (Marwell 2009). How could this be the case if buyers are overloaded with content? This is the first instance in which customizable databases like Catalogue 2.0 and Edelweiss will really smooth the transition from paper to digital catalogues: practically minded user interfaces will strip away any inapplicable content, highlighting instead useful information like sales data for an author's previous work.

While switching to e-catalogues might be a no-brainer for publishing giants like HarperCollins, small publishers may not be able to afford the transition. If catalogue or ordering databases become the norm, any publisher who doesn't want to be left out will need to create a digital catalogue with more flexibility than a PDF currently provides. Perhaps the solution lies in collaborative efforts, such as the initiative taken by the Literary Press Group (LPG) in creating and distributing an "omnibus" catalogue for its members. So far, praise has hinged on the fact that "people who may not be aware of ... some of the smaller Canadian publishers get to see a wonderfully broad representative

sample of titles” (Godfrey 2010). The positive reception of this venture may lead the LPG to create a comprehensive e-catalogue.

### **Sales Reps: The Main Squeeze**

As may be expected, many sales reps are apprehensive about the shift from “p” to “e” catalogues; for example, the home page of the National Association of Independent Publisher Representatives (NAIPR) features a letter from Executive Director, Paul C. Williams that describes an “industry struggling with e-catalog technology” (Williams 2009). Catalogues are the sales rep’s most central tools, whether going through stacks at massive sales conferences or bookmarking highlights for bookseller clients. In the print catalogue system, a sales rep acts as a helping hand, who guides a buyer through countless pages, identifies books that are likely to be hot sellers, and recommends titles that will best suit a particular client. The NAIPR’s resistance to e-catalogues may stem from anxieties about automated recommendations replacing human ones.

The above scenario falls in line with German economist Joseph Schumpeter’s “creative destruction” theory, which states that technology and innovation simultaneously create new jobs while making others obsolete (Institute of Public Affairs 2005). It seems more likely that sales reps will be provided with more efficient tools to help carry out their essential role in the supply chain. Rather than resisting this new technology, reps should be the first to master it and discover what new sales opportunities it creates; after all, with HarperCollins taking an early lead and Hachette, Simon & Schuster, and Random House close behind, then digital catalogues will soon be the “new normal” (Andriani 2008). If reps and their clients still prefer to work on paper, they will have the option of printing PDF versions of the e-catalogue (something offered by HarperCollins, and most likely by the others as well). The most promising function of e-catalogues for sales reps will be the opportunity to take advantage of the data at hand when the CataList database comes online. Making trusted recommendations is a sales rep’s most crucial contribution, and accessing the aggregated data in CataList would let reps compile a personalized “recommendations” list before a

sales meeting. While the transition to e-catalogues seems to leave sales reps with the most to lose, they also have the most to gain: a reinvention of their primary sales tool will inevitably create new opportunities.

### **Buyers: Please, Please Me**

After publishers and reps, next on the supply chain are book buyers, such as librarians and book retailers. Since catalogues are meant to encourage sales to these book buyers, much of the debate surrounding the shift to e-catalogues is focused on them. Buyers are keeping a close watch on these digital developments; the American Booksellers Association (ABA) even held a “Digital Catalog Task Force Meeting” in August 2008 “to determine what core functions a publisher’s digital catalog must perform to be useful to independent booksellers” (American Booksellers Association 2008). Overall, the ABA concluded that e-catalogues need to be customizable, intuitive systems that “flag” publishers’ title updates and include shopping list and annotation functions.

However, most e-catalogues are still in development and prove problematic in practice. When asked about his experience with e-catalogues, Dean McGregor, a manager of Book Warehouse in Vancouver, wrote: “One of the problems we’ve noticed so far is that the online versions from some publishers are, for lack of a better term, clunky. So far ... the online catalogues are difficult to use.” In addition, he notes that at buying meetings “it is just much easier to say, ‘Everyone turn to page 67 in the Penguin catalogue,’ rather than have everyone try to find it on a website” (McGregor 2010). Here, McGregor sums up the essence of the buyers’ current resistance to e-catalogues: the lack of an e-catalogue standard among publishers means that it’s difficult to flip back and forth between them (for example, one site will work completely differently from another), and sharing items of interest with colleagues is not intuitive.

These concerns aside, growing evidence demonstrates that booksellers are warming to e-catalogues as the technology continues to improve. In May 2009, an Ingram survey of 2,000 book buyers found that “over 49 percent of respondents are open to using e-catalogs instead of print catalogs ... as long as the electronic versions [are] easy to use



with ‘shopping list’ functionality and POS [point of sale] download capabilities” (Ingram Marketing 2009). Once again, BNC’s CataList will provide all of these functions as well as the standardization and “flag content for colleagues” option desired by Book Warehouse’s McGregor (BookNet Canada).

**Conclusion: Data or Trees?**

While most e-catalogues are still far from the ABA’s ideal system, HarperCollins’ slick product shows that the future of e-catalogues will definitely not be “clunky.” If accessible, customizable, and efficient databases like BookNet Canada’s CataList are widely adopted, the e-catalogue’s benefits will finally outweigh those of their paper counterparts. There is definitely something romantic about the image of a bookseller bent over a pile of catalogues, flipping through the pages and excitedly choosing books that will hopefully be big sellers for the upcoming season. In reality, however, booksellers are time- and revenue-starved. Efficiency in the supply chain is more important than ever before, and switching to e-catalogues will be painless.

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# The Struggles of Ebook Pricing

EMMA TARSWELL

Publishers have evaluated and priced their own products for decades, but ebooks have proved to be a difficult case. Emma Tarswell blames “near-monopolistic business structures” for the turmoil. As John Maxwell says, “the ebook market is currently being pulled apart by competing monopolies. Unlike the traditional publishing monopolies/oligopoly, here we see ereaders (especially Amazon, Apple, and soon Google) looking to dominate.” So where does this leave publishers? Written before the advent of agency-model pricing, Emma’s paper addresses ebook pricing in “a market that promotes free content and low price points.”

*Emma Tarswell focuses primarily on her own publication design work, specifically magazine layout. In addition to her MPub coursework, Emma is also completing a 2D Design Certificate from Emily Carr Art and Design University. She will read ebooks once ereaders offer a scent feature that makes them smell like musty, old print books.*

KEYWORDS: EBOOK PRICING, EBOOK FORMAT, APPLE, PRINT VALUE VS. DIGITAL VALUE, AMAZON

DURING THE LAST decade, publishing houses have been forced to confront the ways that technology is transforming—and will continue to transform—the publishing industry. Faced with a market that promotes low price points and free-flowing content, publishers must develop strategies on how to compete. Pricing ebooks is particularly challenging for publishers since their investment in their production—both financial and temporal—does not align with what consumers are willing to spend on their results. The following is a brief overview of ebook pricing strategies, the main ebook contenders (at least for the moment), and some possibilities for the future.

As Michael Tamblyn, Kobo's Executive Vice President of Content, Sales & Merchandising, illustrated when he lectured to SFU's Master of Publishing students in Fall 2009, American ebook readers tend to stop buying once a digital edition reaches \$9.99. While he noted that in Canada, the drop-off point tends to be \$11.99, this is still a significant gap when one considers that readers are willing to pay upwards of \$30.00 for a new hardcover print edition. The content in both books is the same, but customers do not value it equally. Many argue that a strong economical precedent has been set for online purchases (apps are usually no more than \$3.00), shaping consumers' expectations that digital content should come cheap. Thus, consumers have been conditioned to pay less online (Booknetblog 2010). To add a layer of analysis, I argue that a product's tangibility plays a significant role in consumers' spending preferences. Psychologically, it can be easier to pay more for an item that one can smell, touch, and place on a bookshelf when finished with it.

Publishers may be struggling to move ebooks off digital shelves at a decent price, but for retailers, the price is right for making sales. At the moment the online book and media retailer Amazon is the main contender in the ebook retail business, for two reasons. The first is that Amazon is a strong retailer and prior to launching its ebook line, it was already enjoying strong brand recognition and a sizable customer base. The second is the popularity of Amazon's own ebook reader, the Kindle, which allows readers to take their ebooks with them. Since Amazon was one of the first retailers to the ebook table, they set the precedent for the \$9.99 pricing (Krozser 2009).

In late January 2010, Amazon sparked controversy by pulling ebooks and print books from Macmillan from their store, apparently because the publishing house attempted to price their books above \$9.99 so that they could make a profit on their e-editions. Amazon, citing minimal production costs and proven reader-purchasing habits, argued that a higher price would result in fewer sales (Doctorow 2010). After several days of public back-and-forth missives across multiple articles and blog posts, Amazon gave in, stating that they would allow Macmillan to price Macmillan's books as they saw fit. They did, however, make their disdain for Macmillan's practice abundantly clear, noting that they felt the prices were "needlessly high for ebooks" (Rich and Stone 2010b).

Now that Apple has released the iPad, many assume that it is only a matter of time before the iBooks application (or "app") for the device takes over the ebook market. Apple has advertised and explained the iBooks app as follows:

The iBooks app is a great new way to read and buy books. Download the free app from the App Store and buy everything from classics to best sellers from the built-in iBookstore. Once you've bought a book, it's displayed on your Bookshelf. Just tap it to start reading. The high-resolution, LED-backlit screen displays everything in sharp, rich color, so it's easy to read, even in low light (Apple 2010).

Apple is quick to identify that the iPad is able to display both ebooks and magazines in colour, a feature yet to be offered on any other ebook reading device. The company also points out that readers are able to continue to read even in "low light," addressing a major flaw of print books (that is, one cannot read a print book in the dark, but one can do so with an iPad.) This, however, is not the main reason publishers and retailers in the business of ebooks worry about a future Apple takeover. Rather, Apple alarmists are concerned about the valuable information on reader habits and demographics that Apple can gain from users. Much like iTunes, iBooks (which is not yet available in Canada) will force users to register in order to purchase ebooks. By gaining this information—essentially free market research—Apple will be able to advertise more

effectively to potential readers, get more subscribers, and sell more books than traditional publications (Reagan 2010).

As noted above, ebooks are subject to near-monopolistic business structures, whereby one company—or five companies, as with the agency model that has just come into effect—sets the prices and has significant control over what occurs in the market. Readers also have some control over how ebooks are priced; if they don't believe the price is right, they will not buy (MacDonald 2010). While readers are predisposed to a \$9.99 price cap, their perception of the value of the ebook also plays a role. Many readers assume that an ebook does not have any production costs and should therefore cost less than their print counterparts (Rich and Stone 2010a). This begs the question: what can publishers do to move forward, maintain readers and still make a profit?

Dynamic pricing is one option available to publishers. Instead of getting stuck in a fixed price rut, publishers might opt to price an ebook at any price they want, monitor the buying patterns and reprice accordingly. They can also look to “new release pricing,” allowing publishers to have a higher price over the first few weeks of publication and then decreasing that price later on. Such a model mimics that of print model in which new release hardcovers are priced higher than the trade editions and mass market paperback editions that follow (Tamblyn 2010). While Amazon recently offered publishers a larger cut of revenue for signing with them, publishers are less inclined to accept a signing bonus because they stand to gain more from controlling their pricing (Bilton 2010).

When it comes to ebook pricing debates, discussion and concessions between publishers, retailers and customers are happening on a daily basis. Readers have some leverage in this debate, as publishers need them to buy their product and therefore need to price their books at a price that will be purchased. More pricing strategies need to be tested and reception from readers still needs to be studied. It appears as though, until ebooks become the primary medium for reading, prices will continue to be debated and rehashed.

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# Are Libraries Dying? Ebooks and the Future of Libraries

KELSEY EVERTON

The issues of owning and licensing e-books encountered by retailers and discussed by Gladiuk, Smith, and Tarswell prove even more problematic for libraries. John Maxwell points to the “less friendly rights situation” and the allure of “unencumbered pirated content” working in tandem to draw users away from libraries as a source for digital content. In her article, Kelsey Everton presents the challenges libraries face as they move from print to digital and takes an optimistic view of their future.

*Kelsey Everton professes a lifelong love for libraries and the books they share so generously. Her passion for good writing benefits her work with the Writers Guild of Alberta, where she coordinated the 2008 Alberta Literary Awards and Awards Gala and helped to launch inkPulse 2009, a camp for young writers.*

KEYWORDS: EBOOKS, EBOOK READERS, LIBRARIES, PROCESS OF READING, EBOOK LENDING, ACCESSIBILITY

THE RISE OF ebooks and other digital content, coupled with the success of online bookstores like Amazon, has led many to speculate about the demise of the traditional bookstore (Shatzkin 2010). Michael Tamblyn told the MPub class just a few months ago that in creating Shortcovers (now Kobo), Chapters and Indigo had built its own competition—essentially creating that which could destroy it. But where does that leave libraries? Do they face the same uncertain fate as brick-and-mortar bookstores in our increasingly digital world?

With print books, libraries operate under what is often called the first sale doctrine; that is, “the idea that you, well, own the things you own” (Spalding 2010). Libraries pay once for a book and then can lend it out as many times as people want to borrow it. With this, libraries get more value from a book purchase than does the average consumer.

However, ebooks and other digital content fundamentally change the dynamics of the game. In practice, for any purchaser, buying an ebook is more like renting than owning. You can’t resell or donate an ebook after you’ve read it (although there’s been some discussion on how donating ebooks to a library could work) (Sperberg 2009 and Polanka 2009). You can’t really lend an ebook after you’ve read it (unless you’re using the Nook—where, bafflingly, you can only lend out an ebook once. Ever. [Nosowitz 2009] Perhaps they think everyone only has one friend who reads?) And your ebooks—ones you’ve already paid for and might be in the process of reading—can at least theoretically disappear from your reading device: it happened with the Kindle and George Orwell books (Pogue 2009). If libraries too are really just renting their ebooks, they essentially lose their first sale advantage—and find themselves paying for content not just once, but repeatedly.

These ebook economics have significant implications for libraries. Libraries truly strive to stay relevant and have really embraced the potential of digital technologies (Albanese 2008). In doing so, many have turned to “specialized library service providers” such as OverDrive and NetLibrary, which act as digital content aggregators for libraries (Turner-Riggs 2008, 4). In providing libraries with access to thousands of digital content files in exchange for subscription and access fees, these aggregators give libraries a great advantage: the expertise and infrastructure to quickly delve into the digital world.

Libraries in British Columbia, including the Vancouver Public Library, offer ebook lending through Library to Go, powered by OverDrive. In Ontario, the Consortium of Ontario Libraries (COOL) provides ebook access through NetLibrary (Morden 2010). For publishers and authors, companies like OverDrive and NetLibrary are both positive and negative: they provide publishers with access to a wide range of library markets, but they also take a steep percentage of library sales—up to 50% (84). Libraries pay regular subscription fees to access digital content, but creators aren't seeing equivalent regular payments. To better position themselves for the library market, publishers and authors need to either find a way to work with libraries directly or negotiate a better split with the library service providers.

In the print book model, many countries like Canada and the UK (but not the US) have implemented Public Lending Right (PLR) programs. PLR compensates authors for “lost sales” due to library copies, and are calculated based on the presence of a title within selected library catalogues (not based on how many times the title is actually checked out) (PLR Commission 2010). Currently, only print books can receive PLR payments; audiobooks and ebooks are ineligible (Lanoue 2010). There are indications that such programs are considering making digital content eligible (UK Culture 2009, 132)—but how would such a program work? Ebooks are not physically tangible like print books, so how would it be determined if they were present in a library catalogue? If they were present in the OverDrive collection and a library subscribed to it? What if a library cancels its subscription—does that book disappear from eligibility? Ultimately, it's not about making ebooks work according to the existing print book PLR model. PLR and equivalent policies will eventually shift to reflect ebook realities and practises. But it is imperative to consider how, in a world of wide digital availability, payment programs will adapt and shift.

Traditionally, libraries have been able to build up their collections over time. Once they purchased a book, they had it forever (or until someone lost it), and so a library was as strong as its accumulated collection. With the shift toward rental and digital content aggregators, libraries now become “only as good as their last subscription check” (Spalding 2009). Libraries could actually lose their collection if their

funding decreases or budget is cut. Another implication of ebooks for collection building is that a lot of ebook formats have been tied to specific devices, some of which will almost certainly soon be obsolete and those books will therefore be inaccessible. A primary concern of libraries as well is accessibility, and not everyone can or will purchase an ebook reader. So some libraries, in their efforts to be accessible and experiment with emerging digital content, have emulated a “consumer model” and purchased multiple different devices and loaded a number of books onto each of them. But as Tim Spalding points out, “digital books locked to physical devices are worse than physical books ... when you take out a physical book, one book is unavailable. When you take out a Kindle with 100 books on it, 100 books are unavailable” (Spalding 2009).

In general, libraries have treated ebooks as print books. If you take out an ebook, it is unavailable for the next user until you “return” it to the library—even though it’s a digital file that could (at least, if not for DRM) be shared with multiple users simultaneously. For individual users, the Sony Reader partners with OverDrive to allow device owners to “check out” book licenses from their local library (without actually going to the library), and then the book is automatically “returned” when it’s due back so that the next user can borrow it (Patel 2009). All this is based on treating ebooks as if they were print books. And I think for right now, that’s a good transitional model to go with. In the long run, though, surely we will not continue to artificially impose the limitations of print on digital content.

Specifically for libraries, though, it seems like the consumer ebook model—which is based on the way that print book readers use books—is not going to work in the long term. This necessitates a new “library model,” and we’ve already seen the beginnings of that through library service providers. This means that libraries and consumers will be accessing books through different models, splitting the market—and it’s been suggested that libraries will be paying more as a result (Spalding 2009). With a split market, price discrimination is possible. Libraries have typically received a slightly different discount structure than bookstores for print books, but the price discrimination they face for ebooks is more consequential. Any type of subscription or rental model

does mean that libraries will be paying more, as there is not just a one-time purchase but recurring fees lasting indefinitely.

A counterargument against increased prices for libraries is that the wide availability of pirated (free) ebooks will keep prices down (Griffey 2009). I can see this argument having merit for consumer purchases: if consumers can easily access a pirated ebook for free, they'll be less willing to pay inflated prices for a legal version. But libraries, I think, are in a different position. Very few libraries, if any, are even going to consider making pirated content available. And patrons won't be able to donate pirated ebooks to the library. So that means that a split market, with a library model, gives libraries no choice but to pay increased fees. A better question, perhaps, is why a reader would choose a library ebook over a pirated edition, if both are available for free? It depends on distribution: the ease of use and intuitiveness of digital book collections. If the system is cumbersome and wait times prohibitive, library users might not see a benefit. (An informal look through the Edmonton Public Library's ebook collection left me hard pressed to find titles that were actually currently available). But if high quality content is easily available, ebook readers might turn to libraries because it's simply easier and more convenient. Library patrons are said to like being able to collect and return books without ever actually having to go to the library (Savov 2009). And current library users, already accustomed to dealing with the library, might be more inclined to use the library for ebooks than get them elsewhere.

A Library and Archives Canada study indicates that there are three main categories of ways that libraries are currently managing ebooks: print (limited to one user at a time), database (which often allows for simultaneous access to content), and open access licensing agreements (Turner-Riggs 2008, 4). Academic libraries are embracing open access models much more quickly than public libraries: understandable due to academia's focus on sharing information rather than profit. Interestingly, two soon-to-be-published studies looked at the cost of digital content in academic libraries. Both concluded that in the long run, ebooks will save libraries money (in warehousing, storage, and space), but that it will take awhile (Kolowich 2010). The same concept can be expanded to look at the overall future of libraries. Because of rental and subscription

models, ebooks will cost libraries more in the short term, if you compare them one-to-one with print titles. But digital content also opens up so many more options for accessibility—making it possible to access any text in the world; for example, BookServer, a massive undertaking of the Internet Archive, is working (in part) to facilitate ebook borrowing from libraries around the world (Internet Archive website 2010). Ebooks also will reduce library shipping costs (no more mailing interlibrary loans), storage, and maintenance. So eventually, over the long term, money will be saved elsewhere.

Ebooks offer significant advantages that mean not the demise of libraries, but a larger role for these public institutions in the social sphere. Brewster Kahle of the Internet Archive is adamant that libraries will not be lost in the transition to digital if they can provide digital services that are open and accessible (Albanese 2007). That's why his BookServer project imagines an expanded collection of books available for lending in a distributed way—working necessarily with libraries, not bypassing them. Libraries are a primary source of collections available for digitization, and can attract funding to promote the accessibility of texts: libraries are highly valued for providing free access to knowledge for all. Perhaps most importantly, libraries are virtually the very definition of social capital—and according to Char Booth, they've "been at it for millennia" (quoted in Miller 2008). Libraries have a long history of adapting and enduring, and their efforts and experiments with ebooks so far indicate that they will stay relevant. Digital content unquestionably presents challenges, but also invites long-term value, accessibility, and a fresh avenue of potential for libraries.

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# I Dare You to Say “Reader Engagement” One More Time

KATERINA ORTAKOVA

**I**n the still-turbulent world of digital media, have publishers stopped using content to engage with readers? Katerina Ortakova argues that this is a critical failure in the battle to establish the role and value of electronic formats. Chelsea Theriault agrees, saying, “it’s troubling that there is so much focus on being different, rather than being better.” Ortakova takes a back-to-the-basics approach in her article, suggesting, “better content and not enhanced features will be the key to continued reader enjoyment.”

*Katerina Ortakova is an incessant nomad, an excessive Oprah watcher, a food lover, and an engaged reader. She looks forward to a lucrative career in publishing so she can afford a round-the-world airplane ticket and a Boston terrier pup. Soon, her gypsy ways will take her to Toronto, where she’s gearing up for a little less sushi and a little more sunshine.*

**KEYWORDS:** READER ENGAGEMENT, MIXED MEDIA, DIGITAL TEXT, DIGITAL TECHNOLOGY, E-READING DEVICES, CONTENT CREATOR

AT THIS YEAR'S O'Reilly Tools of Change (TOC) conference, rare was the presenter who didn't mention the necessity of engaging with readers in one form or another. As "reader engagement" quickly climbed the buzzword popularity charts, leaving "synergy" in its wake, I wondered whether it was really true that publishers and authors were not engaging with readers through their content anymore. Since I don't have a direct answer to this question and since the answer is not really as important as the current zeitgeist prevalent in the publishing community, I will assume from TOC's presenters that there is a dire need for content creators to engage more intensely with their readers.

Through all the *engaging* talks I heard, I couldn't help but reflect on the question of whether publishers, in their quest to keep up with current technologies and to meet their readers in the spaces they inhabit, have forgotten that readers possess a little, magical thing called imagination.

While resisting the bitter taste of mixed media and enhanced stories being shoved down my throat, I contemplated the idea that, as much as reader engagement is crucial to the survival of the publishing industry, this engagement is perhaps being employed to the detriment of content and is perhaps better left out of the actual act of reading as it relates specifically to digital devices. Before I leap into why and where I think engagement is unnecessary and disruptive to the reader, I would like to point out that this argument is solely centred on fiction. There is no arguing the fact that audio and video elements, if used wisely, can add an important and very worthy learning dimension to any academic or educational text such as textbooks, cookbooks, and how-to guides. These books may require a slight amount of imagination but not the type that is being brutally quashed in readers' minds by what some people in the publishing industry are now advocating as engagement.

It is clear that in today's technological world, readers more than ever before are expecting a greater amount of engagement with texts and with the people who create these texts. Peter Collingridge, co-founder of Enhanced Editions, even goes so far as to say that, as a result of the technological changes currently happening in the world, "value needs to be reintroduced into books to increase readers' enjoyment of texts" (Collingridge 2010). This statement may be true in part, but as Peter Meyers, associate publisher of O'Reilly Media's Missing Manual

series and presenter at TOC on “10 Ways to Enhance Your iPad Books” (Meyers 2010), suggests, would a reader’s enjoyment of a text be increased by an obtrusive bubble that pops up and contradicts a previous statement? I would argue not. Adding fancy, and what some might call engaging, features into digital texts will only serve to distract readers and pull them out of the imaginary world they are inhabiting; such features have the complete opposite of the intended effect. As Dominique Raccach pointed out in her presentation on “Taking Book Publishing beyond Publishing Books,” “by adding additional types of content, the immersion and integration of an author can be taken away from the reader” (Raccach 2010). While the notion of reader engagement is one of the most important aspects of publishing today, this engagement needs to be taken outside of the digital book format. To disagree with Collingridge’s notion, better content, not enhanced features, will be the key to continued reader enjoyment.

Hundreds of thousands of books are published around the world every year and arguably, among other aspects, the books with the best content are the ones that reach the bestseller lists. Skip Prichard, President and Chief Executive Officer of Ingram Content Group Inc., suggests that “in place of today’s ereaders, there will be enhanced devices that make stories come alive” (Prichard 2010). Sorry to disagree with you, Skip, but in my opinion stories have always come alive—in the imaginations of their readers. Maybe I have been misguided in my thinking, but isn’t this where the beauty of reading lies? The imaginary worlds created through the words of authors who have toiled over them for the better parts of their lives are the reason people love to read. Engaging readers, for publishers, should be about providing engaging content not engaging technologies. Think about *Esquire’s* escapade into augmented realities in November 2009 ...wasn’t that fun? As much as I enjoyed having Robert Downey Jr. yell at me through my computer screen, I’m not sure if all this engagingly interactive technology made the magazine “come alive” for me. It was novel but gimmicky, and added no value or quality to the content, which is ultimately how and why readers make connections and engage with texts.

Imagine, for example, reading the *Twilight* series in digital format on your mobile phone and stopping at a chapter right before Edward

visits Bella at midnight in her room—which seems to happen in almost every second chapter (conveniently, for this suggestion). With the metrics currently available on ereading devices about reading patterns, it would be easy for publishers to determine where the reader stopped in the text. Now imagine getting a text message at midnight saying: “It’s 6°C and raining. Edward needs to tell you something.” Slightly creepy but also enticing for *Twilight*’s demographic. Put aside the issue of sleep for a moment because, let’s face it, it’s not like anyone sleeps anymore anyway, particularly not the readers of *Twilight*, and think about how this particular use of technology is much more likely to draw the reader back into the text than the fancy feature ideas currently circulating in the publishing industry.

The current model being propagated for engaging readers with digital texts is introducing mixed media. Wouldn’t a message telling you that Mr. Darcy is about to arrive, and you better fix your hair, grab your attention and pull you back into a text much more successfully than the ability to hear *Pride and Prejudice* read out loud or see a video clip of Mr. Darcy arriving? Brad Inman from *Vook* stated in a presentation at the TOC conference that “film makers and authors will come together to create new experiences for readers” (Inman 2010). This statement seems like the most absurd thing to say at a publishing conference. Yes, they will come together, and they already have ... in movie adaptations of books. Inserting video into a novel turns it into a movie with subtitles. This genre already exists and does not need to be (re)invented by publishers.

Dominique Raccah smartly points out that “publishers create theaters in the mind,” and she goes even further to suggest that “your books do not have to be a place where readers and authors can congregate” (Raccah 2010). So, if digital books are not the right setting for publishers and authors to engage with readers, and Arianna Huffington says “it is the Golden Age of Engagement” (Huffington 2010), then where can authors find the space to engage and connect with their audiences? Social media, of course. There is an enormous number of ways authors and publishers can engage with their readers through social media beyond the obvious, and obviously boring, Facebook fan pages. Hearing Chris Brogan, who is the author of *Social Media 101* and undeniably

a master at making personal connections with his readers, speak on how he uses social media to make direct contact with his fans sparks a fountain of ideas beyond the usual. As Tim O'Reilly stated in his closing keynote speech at the TOC conference, "focus on people, not products" (2010). Brogan, as "an eleven year veteran of using social media and both web and mobile technologies" (Brogan 2010) has done exactly that. He prides himself on his ability "to build digital relationships for businesses, organizations, and individuals" (2010). One way he has made his readers feel that they have a personal relationship with him is by holding a competition where his readers send in photos of themselves, their friends, their relatives, their pets, whatever strikes their fancy, with his novel. His fans vote for their favourite photo and people get very involved in the contest. Brogan's fans send pictures of their dogs, their babies, and other interesting and slightly obscure people and animals reading his books. This example demonstrates one way in which authors and publishers can think outside of the ebook engagement box and create communities for their fans around the books they love to read.

Another great point Tim O'Reilly makes about using social media and digital texts is that "it is not about selling something. It is about adding value" (O'Reilly 2010). Publishers, in an attempt to stay abreast of the technologically changing world and make enough profit to sustain their work, need to remember that the right strategy does not involve forcing readers to purchase digital texts by creating crazy and over-the-top applications; instead it is about convincing readers with easy add-ons that digital is better. Peter Meyers, who "has worked at the intersection of writing and technology for more than two decades ... [and is] currently writing 'A New Kind of Book', " examined the coming of the iPad and some of the ways in which it will affect publishing in his discussion at TOC (Meyers 2010). During his talk, Meyers brought up many ideas that were beyond the realm of possibility simply because they were not applicable to publishers, who want to remain publishers, but he did have several points where he took the exact approach towards digital texts which I think will be key in convincing readers that digital is better. One example Meyers suggests is that, often times, people are reading a number of books simultaneously and many character names may be similar and overlap from novel to novel. This aspect can be



very distracting for readers who may not remember who is who in a text and be pulled out of the story as a result. Meyers' solution to this problem, as it specifically applies to reading on a digital device, is that the reader is able to tap on a character name and a small one- or two-line description of the character pops up to jog the reader's memory. This feature is completely unobtrusive and does not interfere with the reader's enjoyment of the text. Another great opportunity with digital texts is the ability to deliver additional content to readers. Ebooks have their own set of unique benefits and one of these benefits is the opportunity to provide readers with the ability to view rough drafts, additional content, or any other add-ons that might relate to a specific title. In the same way that DVDs come with special features, so ebooks can have a variety of extras to engage the reader further with the story. These types of extras build author loyalty and content interest in readers but they do not pop up obnoxiously, or force the reader to divert their attention to something outside of the text thereby disturbing them in the middle of a private moment they are enjoying with the content.

Ultimately, then, what is the good of all this digital technology on publishing? Perhaps what a reader is looking for when turning to the Internet in their reading habits is a companion, a reading buddy, someone they can trust to recommend a book and someone who they can discuss the book with later. Isn't that where the success of social media lies? Allowing people to connect with others who they can relate to? Perhaps what publishers need to do is instead of looking at ways to digitally enhance their texts, they need to focus on ensuring that readers are forming meaningful communities around their texts. Perhaps what reader engagement needs to refer to is helping readers engage with each other over texts instead of adding features to texts which attempt to convince readers to engage with those texts. Readers engage with the words on the page and with their fellow readers, not with additional, unnecessary features.

As Skip Prichard correctly points out, publishers need to "go back to the basics" and remember that their role is ultimately about "ensuring that content is reaching its destination" (Prichard 2010). To take his thinking slightly further, publishers need to remember that it is the content they choose to publish and unleash into the world that

makes readers feel a greater connection to the text and, ultimately, keep reading. By annoying readers with loosely related, garishly flashy content popping up in their stories, publishers are only going to push readers further over the precipice of stupidity where the concept of imagination doesn't exist and where spoonfeeding audio and video content to their readers is going to be the only way for publishers to survive. My suggestion to publishers and authors is: don't dumb your readers down; give them content that makes a difference in the world, that changes the way they think and see the world. Isn't this the reason most publishers became publishers in the first place? Content creators need to remember the importance of allowing readers' imaginations to guide their engagement and enjoyment of texts; and this, not enhanced features, will be the key to the survival and success of the publishing industry.

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# On the Inside Looking Out: Is There Profitability in the Blogging Long Tail?

CARI FERGUSON

Bloggging, like reader engagement, is about creating content that changes the way readers think about the world. Blogs develop a community of readers around them, and that community can be seen as a market or it can be seen as a tribe of like-minded individuals. The blog that markets to its readers can be profitable, but for whom? Mark Bertels commented as follows: “For me, giving someone my attention is social—not transactional ... I follow a few people in several places (twitter, facebook, web). I would consider these people in the ‘magic middle’ of my consumption curve, but it would be difficult for me to make any statement about how profitable I could make these relationships.” Cari Ferguson tells us for whom these relationships can be profitable and why.

*Cari Ferguson argues so well for blogging in the long tail that her father might have been right after all. Following years of competitive debating and public speaking, he naturally encouraged her to become a lawyer. However, a love of books and the written word inspired Cari to choose to fight for good writing and proper grammar as an editor instead.*

KEYWORDS: CHRIS ANDERSON, LONG TAIL, NICHE MARKETS, INDEPENDENT PUBLISHERS, BLOGGING FOR PROFIT, COMMUNITY OF READERS

IN 2008, CHRIS ANDERSON revised and updated his book on the long tail, titling it *The Long Tail: Why the Future of Business Is Selling Less of More* and applying the idea of the long tail to the statistical distribution of sales observed by online businesses. The long tail was an idea that Anderson had been writing about for years in articles for *Wired*, and although its application to online businesses made a great deal of sense, it was still quite novel. He spearheaded the idea that digital distribution of content in a world without storage, packing, and transportation has changed the way that we understand and receive profit. To Anderson, the long tail has a “head,” which is the selection available in the largest (and arguably also the smallest) bricks-and-mortar retailers in the marketplace (e.g., Walmart). It also has a “tail,” which is essentially everything else, most of it available only online where digital shelf space is unlimited. Without the former economic barriers that reduced a retailer’s ability to keep low-selling titles in stock, the long tail makes it economical to actually do so. Prior to the digital world, the long tail as both a theory and a phenomenon did not exist; but now, Anderson argues, distribution networks like Amazon, iTunes, and Netflix demonstrate that the millions of niche markets in the right (flat) side of the curve can be as big as the chart toppers (Anderson 2005).

The long tail theory, which has been much discussed and is widely accepted, often is difficult to pin down—especially in specific business categories such as music or book publishing. In fact, the theory has caused considerable debate when applied most specifically to blogging. Some opponents claim that there is no long tail for blogs; one such critic is Charles Arthur who believes “the short head of blogging thrives. Its long tail, though, has lapsed into desuetude” (2009). Writing in June 2009 Arthur began his case by arguing what he called his “anecdotal analysis.” He claimed that over the previous six months he had noticed what he believed to be a new trend in the blogosphere: fewer blogs with links, and fewer with any contextual comments. Here, specifically, he pointed to the recent lack of comments posted in response to articles published in the *Guardian*. Arthur uses an RSS feed reader named NetNewsWire, in which a link supposedly turns brown when it has not been updated for 60 days. Arthur claimed that, at an alarming rate,

more and more of the nearly 500 feeds that he follows had been turning brown like a “plant dying for lack of water” (Arthur 2009).

Arthur further supports his position by citing a recent survey of the state of the blogosphere. According to Technorati’s report, in 2008 only 7.4 million out of the 133 million blogs tracked had been updated in the past 120 days—a statistic that the *New York Times* said “translates to 95% of blogs being essentially abandoned” (Arthur 2009). Although John Chen of the Li'l Engine disagrees that the long tail of blogging is dying, he does agree that “there are abandoned blog carcasses littering the Internet.” He further admits that “‘Blogging is Dead’ pundits have a point” because establishing a blog is easy, but maintaining it over time is quite difficult (Chen 2010).

The arguments made by Arthur, and those like him, make sense, but may be the result of misreading the data. In 2009, Technorati found that 53% of bloggers were actually blogging *more* than when they started, rather than less (Technorati 2009, 2). Additionally, a number of bloggers, such as Tony Karrer, disagree vehemently that long-tail blogging is dying. Karrer looks at the growth and diversity in the blogging landscape to prove that blogging is alive and vibrant: “When I first started blogging in 2006, it seemed like all the bloggers were exactly the same people who spoke at conferences. Now, there are more practitioner blogs. And there are more good quality vendor blogs” (2009). Karrer even engages directly with Arthur’s claims that long tail blogging is dying. Accounting for the *Guardian* drop-off, Karrer attributes it to diversity and change in the sources people use to find their information; Karrer personally argues that he continues to spend less time “on mainstream publications” because they are too general. Rather, he argues, although individuals may not be reading and commenting on the *Guardian*, they are still reading other, perhaps more varied, blogs (2009).

Technorati’s estimation of the state of the blogosphere supports Karrer’s arguments. An evaluation of Technorati reports of the last few years paints the picture that blogs continue to change the social landscape, as they have become a new, and surprisingly influential, source of media. More individuals are relying less on standard sources of information and news, and are able instead to diversify and obtain their information anywhere. As early as 2006, Technorati established that



blogging and mainstream media continue to share attention in bloggers' and readers' minds, but "bloggers are climbing higher on the 'big head' of the attention curve, with some bloggers getting more attention than such sites as Forbes, PBS, MTV, and the CBC" (Sifry 2006). In 2009, Technorati then added that blogging has been firmly established as a new, and increasingly legitimate, form of journalism:

Professional bloggers grow more prolific, and influential, every year ... The blogosphere is also further insinuating itself into the traditional media's historic turf, as seen most clearly in coverage of the Iran election protests. With more areas of involvement, and more ways to tell the story, the blogosphere is strong—and only getting stronger (Technorati 2009, 2).

The art of blogging is hardly dying; conversely, rather, it is gaining both audience and authority. In an analysis of the 2006 Technorati Blogosphere report, Technorati founder David Sifry argues that the long tail of blogging does exist, but that it is not the most important place to focus. According to Sifry, "With so many blogs and bloggers out there, one might think that it is a lost cause for new bloggers to achieve any significant audience, that the power curve means that there's no more room left at the top of the 'A-List.' Fortunately, the data shows that this isn't the case" (Sifry 2006). Sifry looks a level or two deeper than just thinking about the blogosphere as an A-List and the long tail, because he feels that view is far too simplistic and leaves out some of the most interesting blogs and bloggers that exist, and that define communities of interest in the blogosphere. Instead Sifry examines what he calls "the Magic Middle," which is the roughly 155,000 weblogs that have generated between 20 and 1,000 inbound links. According to Sifry, "It is a realm of topical authority and significant posting and conversation within the blogosphere" (2006).

Regardless of the exact size and shape of the blogging long tail, we need to ask for whom the long tail can be profitable, as there is a strong presence of a rising class of professional bloggers who blog either to generate or to subsidize their income. Anderson claims in his book: "For the first time in history, hits and niches are on equal economic footing,

both just entries in a database called up on demand, both equally worthy of being carried” (2008, 23). However, in the world of blogs, this holds true only in part. Yes, old blog posts can be searched and discovered just as easily as new postings with fresh content. And, yes, the usefulness of the old content never disappears, nor does the access of Internet surfers to that content; however, in terms of being on equal economic footing, this model is insufficient.

With a proliferation of options, variety can also lead to obscurity. One must be careful not to make the mistake of thinking that brands are neither present, nor influential, in the blogosphere. The problem, quite simply, is one of size. With the growth of online distribution, Anderson argues, we are switching from a world of scarcity to a world of abundance (2008, 18). While “the world of abundance” is precisely the reason that online distribution networks like Amazon and iTunes can benefit so greatly from the long tail, it is simultaneously the reason why blogs do not. In 2006, Technorati’s State of the Blogosphere report identified that it was tracking over 27.2 million blogs, which means that the long tail of the blogging world goes out to those 27.2 million blogs. The blogosphere is now over 60 times bigger than it was three years ago and it continues to double in size every five and a half months. Such growth is generated from the fact that, on average, a new weblog is created every second of every day (Sifry 2006).

As recently as 2009, Richard Jalichandra, chief executive of Technorati, said that at any given time there are 7 to 10 million active blogs on the Internet, but “it’s probably between 50,000 and 100,000 blogs that are generating most of the page views.” He added, “There’s a joke within the blogging community that most blogs have an audience of one” (quoted in Quenqua 2009). Alex Iskold, founder of the blog *Read Write Web*, similarly notes that “because of the power law, the long tail of the blogosphere is huge and so any individual blog is not easily discovered. That is, the chance that a random Internet surfer will find a blog that is part of the long tail is nearly zero” (2007). While those blogs and their postings may be deeply important to a handful of select individuals who find them relevant and useful, they don’t necessarily generate revenue. Here is where the long tail model—applied to blogging—begins to fail, as it hinges on Anderson’s statement that:

“Popularity no longer has a monopoly on profitability” (2004 and 2008, 24).

Anderson argues, “What’s really amazing about the Long Tail is the sheer size of it. Combine enough non-hits on the Long Tail and you’ve got a market bigger than the hits” (2004, 3). This is true, small blogs with small followings will always have content existing in the long tail that will ultimately prove to be a larger market than the current material; however, “in order to make money from blogging, [blogs] need more than good, original content—they need traffic” to attract advertisers (Iskold 2007). With advertisers, the popularity of the blog is highly important. If there is an insufficient amount of traffic on a blog, it will not attract the necessary advertisers. Without advertisers, the blog will not earn the profit it seeks. The long tail still exists in the sense that there is value in, and likely demand for, archived content long after it was originally posted, but if the blog itself is not popular, the advertisers will look elsewhere.

The power of recommendations is what drives the long tail in the age of the Internet. Ultimately, it leads to the success of the businesses that cater to it. Joe Kraus, formerly in charge of the Excite search engine and now the CEO of JotSpot, admits that the failure to understand the significance of catering to the long tail of the advertising market led to the downfall of Excite. Kraus claims that the “fundamental reason [Excite] went out of business is because [they] couldn’t figure out how to make money off of that long tail” (speaking in Anderson, 2005). Excite followed the historic model in which large advertisers try to reach large audiences, but failed to recognize that the long tail was a perfect marketplace for small advertisers to reach small audiences. Similarly, blogs, if they wish to be profitable, must also cater to advertisers. In order to attract them, the blog must be a significant “hit” in the Internet world. In this regard, the model that Sherwin Rosen described as the “superstars” effect—in which the top performers in a given field achieve success and continue to move further away from the competition—is much more applicable to the blogging world than is Anderson’s long tail model (Elberse 2008).

The long tail concept is understood, on the surface, to be about making money in the long term. The digital world provides an infinite

amount of shelf space and thus accumulating few sales of a tremendous amount of content actually adds to greater revenue than that received from the individual mega-sellers—as had been the standard of the past. As former music industry consultant and venture capitalist Kevin Laws claims, “the biggest money is in the smallest sales” (Anderson 2008, 23). Although there is money to be made in the long term, the important question to then ask—and one that critics have already started asking is—“does it really make any difference for the individual creator or the individual artist?” (Hiemstra and Leonhard 2007). No, it does not. As Iskold astutely identifies, “money is not to be made by existing in the long tail, but by selling to it” (2007). Individual blog creators cannot profit from the long tail themselves, as previously established, unless they are able to attract significant amounts of traffic that they can use to then attract significant advertising.

Iskold posits that ultimately “you can make money on the Long Tail but not in the Long Tail” (2007); in other words, the money to be made in the long tail of blogging is for businesses *outside* of the long tail. Aggregating it in one way or another, this model can only operate on significant volumes of traffic. Google is the best example of this. Whatever means of monetization the blogger in the long tail has settled on, be it Google AdSense or Amazon affiliate codes, revenues can only be generated on large volumes of traffic. AdSense works for Google because the odds are in its favour; Google makes a significant profit from small advertisers (considered the long tail of advertising) by aggregating small amounts of traffic across the span of the entire Internet. The difference here is one of looking down rather than looking up, or to put it differently, of looking *outside in* instead of *inside out*. Obviously, the math then works for Google because it is based on the massive scale of the Web, but the same model inevitably fails for the smaller blogs with low visitor counts (Iskold 2007). Some bloggers do make income by mentioning specific products in their posts, but many bloggers question the ethics of such an act and worry about damaging the validity of a blog that then appears to be for commercial use. Further, the bloggers who are paid for product references in their blogs still have to attract attention in the first place.

Ultimately, this model is precisely the same as that which we see in

publishing for small, independent publishers. They do not have the solvency or advantages of the big publishers and thus paying large advances and attracting big-name authors is difficult; however, just as independent publishers can thrive even in small size by tailoring their lists to specific niches, the blogging long tail, specifically the all-important “magic middle” that Sifry identifies, has the opportunity to compete and be profitable by attracting not just large numbers of advertisers, but perfectly targeted ones. This is how long tail blogs can become profitable. The reality for the vast majority of blogs, however, is that they are not profitable; rather, they exist for a myriad of other reasons, most importantly being the dissemination of knowledge in a new and ever-evolving form.

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# Take It! No, It's Yours, Really! The Excellent Inevitability of Free

SHANNON SMART

Chris Anderson tells us that niche markets can be profitable by selling less of more, as Cari Ferguson illustrates; his second important contribution to publishing scholarship is the notion that “free” is not to be feared. “Freeing up information for everyone to use—everyone, worldwide—has many positive implications,” writes Shannon Smart in this paper on Anderson’s free model. One implication is that freedom of information does not preclude profitability. Smart’s paper comments on the ways in which business models interact with social contracts.

*Shannon Smart is a fun-loving Canadian gal out to better the world. When she’s not riding her bike to cure cancer, she’s reminding us of important childhood lessons like “sharing is the right thing to do.”*

KEYWORDS: FREE, OPEN SOURCE INFORMATION, INTELLECTUAL PROPERTY, OPEN ACCESS COMMONS



MOST OF THE time, individuals and organizations in the entitled, decision-making countries of the world are supportive of free speech. In fact, freedom of expression is one of the founding concepts of many of the bossiest nations; it's often referred to as a "basic human right," like food, or cable TV. Just take a look at Article 19 of the Universal Declaration of Human Rights: enforcing "the right to freedom of opinion and expression" since the mid-twentieth century (United Nations 1948). If you take spoken words, however, and write them down, type them up, record them, render them in clay, cast them in bronze, or knit them into a sweater ... free speech becomes *property*. That's because we (the pushy bunch mentioned above) live in nations that are also founded on some pretty intimidating capitalist traditions. We base our current economic models on the assumption that calling something "property" means it has an owner who has a right to profit from what they own. That's how property ticked along for many years ... until recently. In the last few years, the warp speed of changing technology has mucked with, well, *everything* related to intellectual ownership.

And thank goodness it did. Frankly, it was time for a change: this whole paying-or-pirating thing was getting a little old. In the realm of publishing, recent technological developments have taken place with unprecedented speed. The rapid rise of e-books, e-readers, digital editions, apps for the iPhone, and [*insert newest innovation here*] have rendered traditional rules of intellectual property and authorship at best incomplete and, at worst, irrelevant. Digital and epublising rights, once only for the overcautious (or über-geeky), are now a fundamental clause in contracts between a "creator" and the "distributor" of the creator's work, whatever the medium or the method of distribution. If specific rules are not established for digital rights, distributors risk the creators taking matters into their own hands. In such a scenario, publishers and other producers of digital content risk losing their hold on the digital rights management (DRM) protections that seek to stifle attempts at sharing content.

So what if we stop fighting the current? What if we instead accept—as Stewart Brand, the oft-quoted, free-leaning brain behind the *Whole Earth Catalogue*, has—that "information wants to be free," meaning not only that information should be distributed without cost, but also that

it “wants” to be accessible without any imposed limitations (Anderson 2009, 96). Numerous publishers and commentators, including Lawrence Lessig, John Hilton, and David Wiley (Hilton and Wiley 2010), as well as Cory Doctorow, have considered the value of free to both the consumer and producer, and have concluded that it generates a symbiotic benefit for consumer and producer. In the case of books, Doctorow notes that:

[the] problem isn't piracy, it's obscurity, and free ebooks generate more sales than they displace ... Their main effect is to magnify any good feeling your book has generated, by making it simple for people who love the book to get it under the nose of their social circle (2009).

This is where open-source philosophy hip-checks DRM into the boards: forget the meticulously worded contracts, the antisharing encryptions, and withholding access to information from those who cannot afford it. Do as you learned in grade school: *share*. (And do it for free).

One all too brief example of the free model in action was a book recently released by Adrian Johns. *Piracy: The Intellectual Property Wars from Gutenberg to Gates*, was available for free download from the publisher, but was a one-day-only offer. (Perhaps if Johns allowed ongoing free downloads, he wouldn't have a book's worth of complaining to do, but in any case...). In *Piracy*, Johns discusses the issues inherent in the business of transferring information, whether it is being bought, sold, traded, or even given away. Johns considers the ethics of sharing information and the tendency for publishers to want to protect what they produce. He suggests that the “problems” that strict, built-in anti-sharing mechanisms and other forms of digital rights management (DRM) purport to solve are not issues of protecting “intellectual property,” but involve “the core issues of political theory and practice: issues of privacy, accountability, and autonomy” (Johns 2009, 508).

Framed in this way, it sounds like sharing information freely is like running around with your eyes closed at the edge of a dangerous precipice. One false move, Johns seems to say, one freely distributed morsel, and privacy and autonomy will go out the window. His

implication is that, with accountability gone, too, we won't even know who to blame for the mayhem that ensues. Amidst his scaremongering sentiments, Johns correctly notes that distributing information willy-nilly has implications for privacy, accountability, and autonomy, but he needn't be so alarmist. Freeing up information for everyone to use—everyone, worldwide—has many positive implications as well; ones that outweigh the danger that DRM and similar measures purport to defend us against. In Canada, for example, organizations like Creative Commons work to ensure that authors who allow others to access their work free of charge are still given credit as the creators (Creative Commons 2010).

But if information is made freely available to everyone, how will anyone make any money? Of course, everyone needs to earn a living, and right now some authors and artists do that by signing contracts with publishing houses. For the creative minds that can subsist on the fairly small profits they earn from giving a publisher the right to print their work, maybe the current paid system is all right. Tally the numbers and measure the long tail, however, and it turns out (somewhat counter-intuitively) that free distribution in combination with traditional forms of distribution is often more lucrative for the creator, or creators, of the work—be it a novel they are sharing, a reference book, the ingredients for a vaccine, or a recipe for beer. And, as the world saw in 2007 with Radiohead's *In Rainbows*—an album the band released for download for whatever price a fan was willing to pay for it, even if that meant nothing at all—it translates to income, whether the content is being charged for directly or not (Anderson 2009, 152-154).

Continuing with the Radiohead example, after the band released *In Rainbows*, the album went on to become their most commercially successful. It sold 3 million copies worldwide, taking into account the sliding scale downloads as well as set-price sales of actual CDs, a deluxe two-CD box set priced at \$80 (which alone sold 100,000 copies), a special-edition vinyl record, and album sales through iTunes and other digital retailers. The concert series that followed sold 1.2 million tickets, which is the most of any of Radiohead's many successful tours since their formation in 1985. It seems when the charges usually levied for using “intellectual property” are dissolved, the ideas and information

therein become something much more positive, offering assistance, education, and entertainment to whoever wants to take part. While the creator of the work may not profit from every use, they're gaining something that no amount of targeted marketing, press releases, or email blasts can exactly duplicate: genuine enthusiasm. Thank you, Radiohead (Radiohead 2010).

Going back to the deliciously titled *Piracy* for a moment, in positing the dangers of sharing information, Johns has actually landed on the power of free: that it levels the uneven playing field of knowledge. What's more, transforming "intellectual property" into something more like an intellectual community centre reflects positively on the contributors, and allows word-of-mouth to travel unhindered by DRM and the fine print of copyrights and contracts. When everyone has equal access, we have achieved a basic human right.

In opposition to the ideas presented by *Piracy's* pessimistic skipper, we have Chris Anderson. In his newest book, *Free*, Anderson reviews the various models of "free" that are currently in circulation, and considers how we got to where we are today: a place in history where nearly anything is available *gratis*, if you have the time, patience, and tech-savvy to access it. Beginning with Gillette razors, Anderson traces the concept of free from its earliest appearances as a baited hook to create lifelong customers, to the now-common three-party model (a familiar one in publishing) in which advertisers subsidize content by paying for ads so that access is free for potential consumers (25). He considers how Mozilla Firefox—a company that has fewer than 100 employees—"runs circles around Microsoft" (111), and finds the "Freemium" model (26-27, 165-66, 253)—where the basic product is free but the "premium version" is charged for, enough to subsidize the giveaway—to be ubiquitous in our ostensibly capitalist communities. Naturally, Anderson's dissection of free also covers Google, a company that proves to even the most skeptical reader that profitability can co-exist with freeness: sharing is Google's core philosophy, and few would argue that they're experiencing any sort of struggle.

Anderson's overarching message, while perhaps a little simplistic at times, is admirable. He makes it abundantly clear: free is the future. Unrestricted access to information is a source of social good, which

alone should motivate a few to see open-access commons, rather than intellectual property, as the ideal business model. Furthermore, with “Generation Free” taking over the economy soon anyways, we might as well not fight it (Anderson 2009, 149). For old people who like having money (this really applies to industries other than publishing), Anderson shows again and again that free doesn’t mean worthless. Free actually increases the worth of ideas by allowing them to spread, gain momentum, and effect change on increasingly large groups of people. It seems to make it big—Google big—in the near future it’s a good idea to nix the barriers of DRM, user fees, and copyright, and let free work for you. Even children know sharing is the right thing to do.

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# Excel Pivot Tables: An Applied Use in the Publishing World

ANN-MARIE METTEN

Every good publisher needs the tools of the trade, and Excel pivot tables, both specialized in application and universally indispensable, belong in this toolkit. “Excel will continue to dominate the business intelligence software market with its 2010 version,” Ann-Marie Metten predicts. For good reason: Heather Sanderson writes, “The efficiencies that are created (not just in time saved but also in ability to analyze more) are phenomenal.” Ann-Marie’s article details the benefits of pivot tables and the basics of using them.

*Ann-Marie Metten vowed she would learn to make the most of Excel spreadsheets when she returned to school this year after nearly 30 years in the publishing industry. Pivot Tables proved to be their best feature.*

KEYWORDS: PIVOT TABLES, EXCEL, BUSINESS ANALYST, MANAGEMENT, INVENTORY



MICROSOFT EXCEL IS the most widely used business intelligence software available today, with a worldwide estimate of more than 150 million people (Sherman 2005)—from structural engineers to scientists to small business owners—using the spreadsheet program to report and analyze data. The Pivot Table function, an exceptional feature of Excel, allows users to “quickly summarize long lists of data” (up to 1 million rows by 16,000 columns in Excel 2007 according to the Microsoft Excel website) and then interact with different views of the same information to identify trends and diagnose problems (MacDonald 2005).

“By far, pivot tables are Excel’s most powerful feature,” writes Bill Jelen in *The Spreadsheet at 25*, “[but] only 42% of power [Excel] users make use of pivot tables. White-collar productivity would skyrocket if 100% of people knew how to use them” (2005, 63). As Jelen’s statement demonstrates, people who believe in Excel really believe in Excel, and for many, promoting its features is like evangelizing a new religion. Conversion to the religion of Excel and persuasion to take advantage of the powerful features its Pivot Tables are the goals of this paper. This conversion begins with a brief history of the development of Excel. Evidence is the best persuasion, so an overview of two applied uses of Pivot Tables within the publishing industry follows the history section. Discussion of the limits of data analysis within Excel spreadsheets compared to a dedicated database program such as Microsoft Access round out this brief overview of the “invention that changed the world” (Jelen 2005, 5).

### **The Back Story**

The history of the Excel spreadsheet begins in 1964 with Richard Mattessich, a Berkeley professor of business administration (at the University of British Columbia since 1967 [Mattessich, no date]). In the 1960s, Mattessich saw the average accountant faced with the real-world problem of having to pencil figures into large sheets of ledger paper and then tally long columns with, at best, an electric adding machine. The accountant always kept an eraser at hand because when one number in the ledger was discovered to be wrong, all subsequent rows had to be recalculated (Jelen 2005, 8). To fix this problem, Mattessich proposed an

electronic spreadsheet that would recalculate account ledgers, budgets, and other financial documents that would solve what-if analyses using Fortran programming language and a powerful mainframe computer. He had the correct idea, but it was not until personal computers (PCs) became widely used in the 1980s that sufficient computing power was available at a low-enough price that most businesses could afford to use spreadsheet software.

Today Excel is the spreadsheet software of choice, but early competitors included VisiCalc and Lotus 1-2-3, each based on different operating systems. VisiCalc came first, in 1978, when Dan Bricklin, a master's student in business administration at Harvard Business School, teamed up with programmer Bob Frankston to develop software that would recalculate an accounts ledger, not by erasing rows of ledger figures, but by punching in a few numbers and having a calculator work out the revised sums (Bricklin 2009). Unlike earlier spreadsheet software, Bricklin's VisiCalc operated interactively on-screen, making it completely revolutionary. VisiCalc was the first computer application developed specifically for the Apple II microcomputer (Frankston 2003), which had been introduced into the market the previous year. The program was released in October 1979 for \$99, sold 4,258 units that year (Jelen 2005, 13), and convinced many people to go out and buy their first PCs.

By 1982 the first IBM PCs had shipped. Working for almost a year in the Assembler language, programmer Jonathan Sachs designed a spreadsheet later called Lotus 1-2-3 that used almost all the features of the IBM PC and its new operating system, ensuring the success of both Lotus and the new platform. Lotus was released in January 1983, and even at the high list price of \$495, it shipped 60,000 units in the first month (Jelen 2005, 16). By October 1983, *PC World* reported that sales of Lotus were outpacing VisiCalc (Jelen 2005, 21). In 1987 two new competitors joined the spreadsheet market: Borland introduced Quattro Pro, and Microsoft produced a Windows version of Excel software.

By 1995 Microsoft had pulled ahead with its release of Excel 5, which featured Pivot Tables. This function mimicked and improved on the pattern recognition tool that programmer Pito Salas had integrated into Lotus Improv, a program first released in 1986 that allowed

“lightning-fast summary analyses simply by dragging field labels around the spreadsheet” (Jelen 2005, 28). Analysts could use Lotus Improv to group and aggregate data in order to identify patterns and then look at the same data in a number of ways (McLean 2007). By expanding that feature with Pivot Tables, Excel 5 dominated the market, offering the spreadsheet user ways to figure out different relationships between various types of information and to perform the what-if analyses of Mattessich’s early 1960s spreadsheets.

### **Pivot Tables in Action at Chapters Indigo**

Excel Pivot Tables are an essential what-if analysis tool for the Chapters Indigo inventory management team, explains Mark Gorrie, Director of Inventory Management for General Merchandise at Chapters Indigo in Toronto. Gorrie leads a team of inventory analysts organized in two sections: procurement, a group that decides which product goes into which stores; and inventory management, a group that monitors sell-through rates and orders more product to ensure ongoing sales revenue (Gorrie 2010). Together the team manages a huge inventory. Taking as an example the nearly 100,000 titles plus merchandise stocked at Chapters Indigo World’s Biggest Bookstore in Toronto, and then multiplying that inventory by a total of 250 Chapters Indigo stores across Canada, it can easily be said that Gorrie and his inventory management team are responsible for monitoring millions of unique articles and site combinations and for identifying when to restock.

Inventory analysts at Chapters Indigo use Excel Pivot Tables to investigate sales anomalies identified in a secondary set of data that is derived from robust proprietary inventory management software developed by SAP. Chapters Indigo uses the SAP software to schedule product delivery to stores, replenish stock, fulfill orders, and manage inventory. SAP accumulates a database of sales information that tracks stock levels and matches actual sales with sales forecasts. Inventory analysts easily import data from this outside source into Excel and then manipulate it using the highly flexible Pivot Tables feature.

To demonstrate Pivot Tables in action, let’s generate a few sample reports and then manipulate data within them to discover the reasons

behind a particular problem: lower-than-expected sales for, let's say, picture frames at the IndigoSpirit store in Banff, Alberta. The inventory analyst begins to identify the reason for the problem by first creating a Pivot Table from SAP source data, as shown in Figure 1.

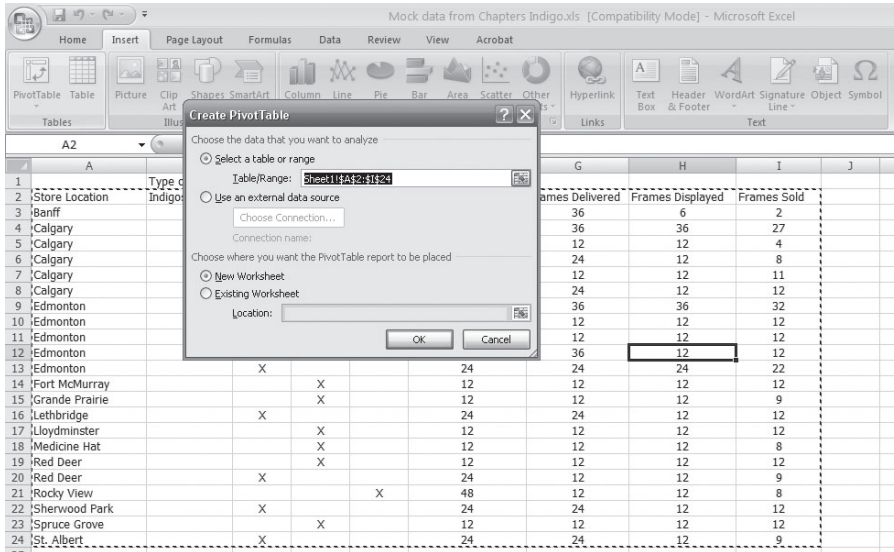


Figure 1. Pivot Table sourced from SAP data

The inventory analyst then begins to formulate questions that require reorganization of the data. Questions are the fundamental starting point for all Pivot Tables, and they initiate the kinds of data manipulations (or pivots) that will take place; for example:

- Does the anomaly appear only at large stores and not small stores?
- Is it happening at Indigo stores and not Chapters stores or vice versa?
- Is the sales anomaly based on a regional difference or is it nationwide?
- Is it specific to one product type or does it relate to the entire product category?

To answer these questions the analyst opens the Pivot Table Wizard, chooses one category of data (say, sales data for IndigoSpirit stores compared with sales data for all Chapters Indigo stores), and drops it into the Pivot Table Field List. The analyst then adds data for the Sum of Frames Displayed and the Sum of Frames Sold, as shown in Figure 2.

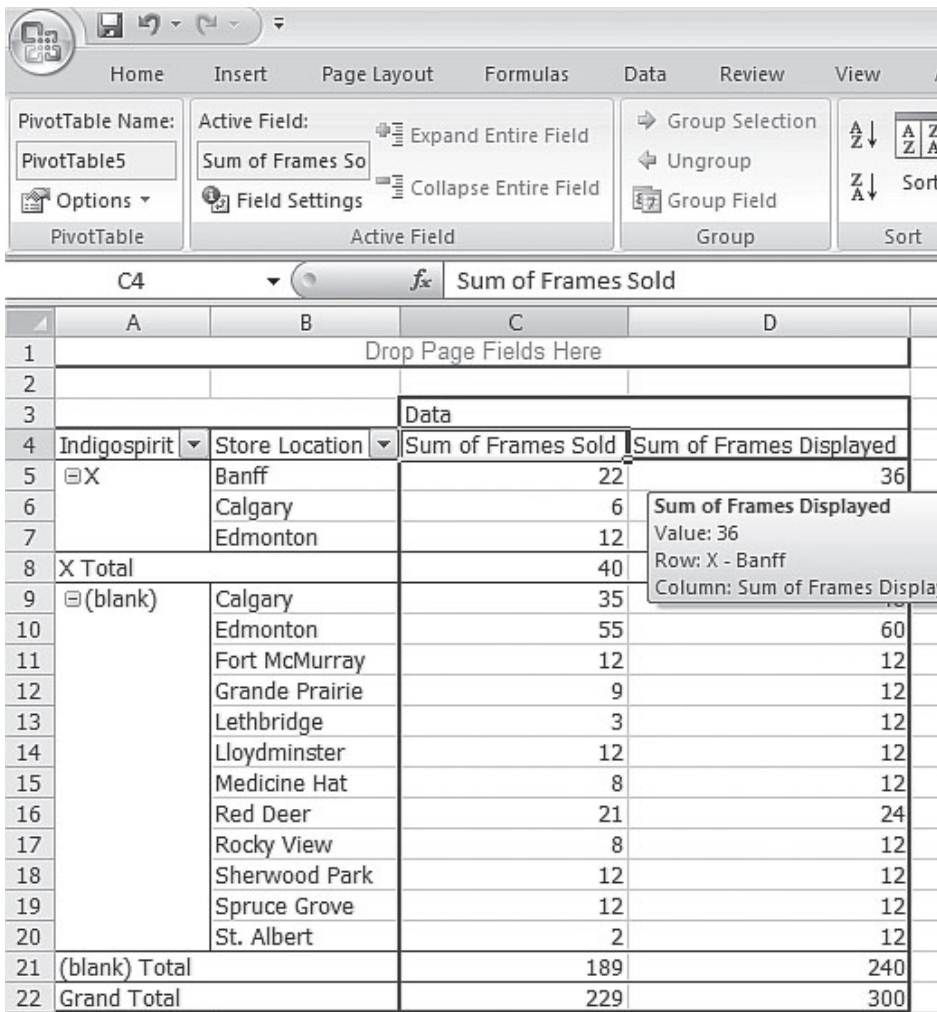


Figure 2. Highlighted data fields in the Pivot Table Field List

Next the analyst decides to narrow the focus to look at IndigoSpirit stores only. Data for IndigoSpirit stores is moved to the Filter section in the Pivot Table Wizard and the analyst moves the Sum of Frames Displayed from the Column Field to the Row Field. This pivot results in an entirely different view of the problem, as shown in Figure 3.

	A	B	C
1			
2	Indigospirit	(All)	
3			
4		Data	
5	Frames Sold	Sum of Frames Displayed	Sum of Frames Delivered
6		2	36
7		2 (Frames Sold) Row: 2	12
8			36
9		9	48
10		11	12
11		12	144
12		22	24
13		27	36
14		32	72
15	Grand Total		342
16			
17			

Figure 3. Data pivots to show a different view of the same information

The result in the Column Field highlights that only six frames were displayed on store shelves, leading the analyst to a conclusion that is confirmed in the next step. The analyst pivots the data again by setting as a Column Field the Sum of Frames Sold, as shown in Figure 4.

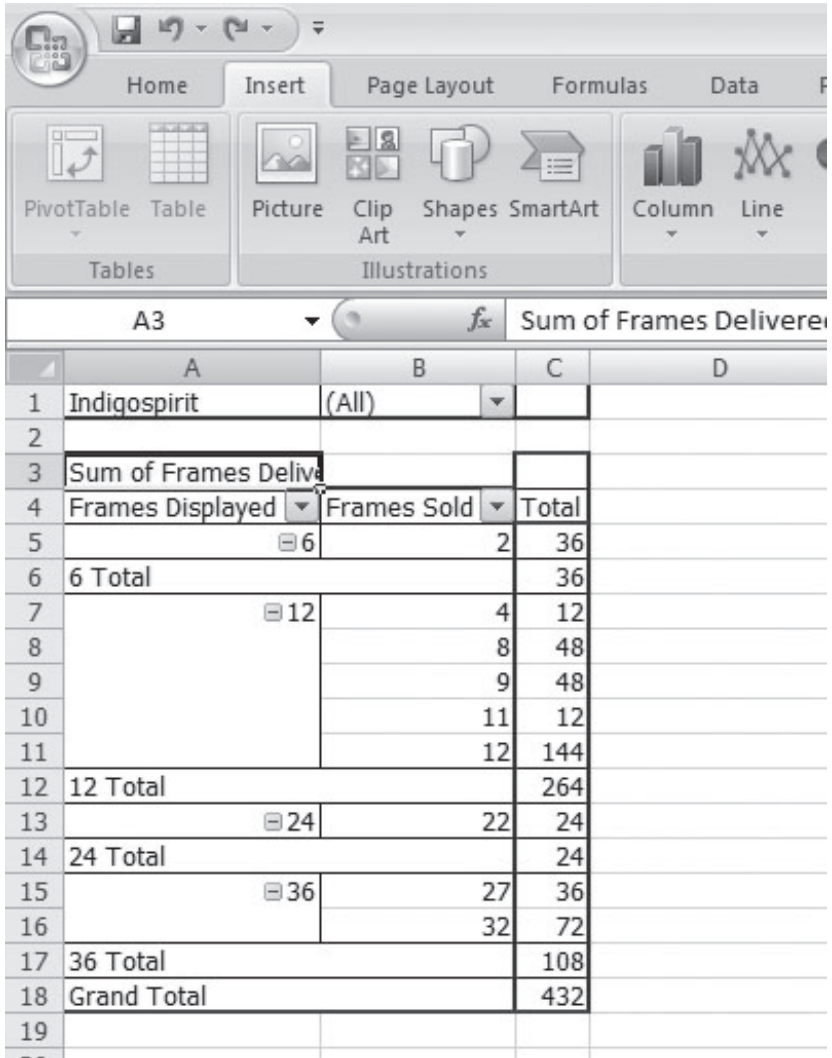


Figure 4. Sum of Frames Sold is set as a column field

At the end of this investigation, the inventory analyst determines that the sales anomaly at a particular store exists because fewer picture

frames were put out for display than at other stores, leading to fewer picture frames sold.

In order to use Pivot Tables to solve such problems, the analyst can move the data field of figures relating to that information into the Pivot Table Wizard and pivot the perspective on resulting inventory numbers until they understand the reason for a problem. Asking questions and adding and removing layers of information in Excel Pivot Tables helps the analyst investigate the problem and then find solutions that, as in this example, correct display mistakes and as a result achieve higher sales.

The Chapters Indigo inventory management team finds Excel Pivot Table investigations to be easy and dynamic because they simply drag and drop each category of information into the Pivot Table Wizard in a highly convenient way. “It’s like they play with the numbers all day,” says Gorrie (2010).

### **Why Excel and not Access?**

When asked why inventory analysts use Excel instead Access databases, Gorrie explained that his inventory analysts have become so comfortable with Excel that they prefer to push it to the limit rather than work with a high-level database program that is not as intuitive or as forgiving as Excel. “Access is painful to learn and requires that the user know exactly the purpose of gathering the data. In Access, they have to know exactly which questions to ask,” says Gorrie, “whereas Excel allows a more ad-hoc diagnosis, and it allows users who don’t really know what they want to do to manipulate the numbers to diagnose and investigate problems” (2010).

### **Competition from Apple Numbers**

As Excel and other spreadsheet programs continue to evolve, competitors continue to challenge Microsoft’s dominance in the business intelligence software market. Apple may gain more users with iWork 08 and its spreadsheet application, Numbers. However, Numbers has only 169 functions compared with 327 functions in Excel, and its pivot tables are still weak (McLean 2007). A further alternative to Excel is available



in OpenOffice's Calc program with its DataPivot function, but it does not support Pivot Charts, which are useful for reporting purposes.

Excel will continue to dominate the business intelligence software market with its 2010 version, which offers additional features such as the ability to effortlessly share analysis through SharePoint 2010 and to analyze even larger data sets through PowerPivot (Microsoft). These features are sure to convert additional users to the benefits of Pivot Tables for data analysis.

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# XML: More Like a Unicorn than the iPad, But Still Not Really a Unicorn

KATHLEEN FRASER

Publishers have a tendency to idealize technology. Like Ann-Marie Metten's Excel Pivot Tables, XML is an essential implement, according to Kathleen Fraser, but ultimately success is still in the hands of publishers. In Mary Schendlinger's words, "The key here is the same as for other technological advances for editors over the last couple of decades: use them as helpful tools; do not expect automation." Fraser's examination of XML delves into pragmatics and terminology for the XML novice, and, more importantly, how publishers can use XML to facilitate their workflows.

*Kathleen Fraser is a dedicated editor, agile publishing enthusiast, and enveloper of mountains. A bird of many feathers, she loves fine literature, good grammar, sneakily progressive pop culture, tofu brownies, and handknit sweaters.*

KEYWORDS: XML, UNICORN, TAGS, HTML, AUTOMATED WORKFLOW, SEMANTIC CONTENT, STYLESHEETS, ACCESSIBILITY, FORMAT

ROGER SPERBERG ASKS, “Why do publishers need XML?” and concludes that an understanding and exploitation of markup will lead to “structural elements ... in e-books that will make them more valuable than p-books” (Sperberg 2010). This rhetoric doesn’t sound much different (if a little less hyperbolic) from the predictions that the Apple tablet would be a unicorn, a time machine or simply the future of literature (Abell 2009, Stone and Clifford 2010, and Akst 2010). Although a device like the iPad is unlikely to “undo mistakes of the past” or “blow up the book business as we know it” (Stone and Clifford 2010 and Akst 2009, respectively), strategies that incorporate XML are capable of changing the game. XML may not be a unicorn but, to the people pulling the plough themselves, it does look like a workhorse.

So what is XML? eXtensible Markup Language is, according to Kevin Goldberg, “a specification for storing information. It is also a specification for describing the structure of that information” (2009, xii). Like HTML or other markup languages, it allows users to describe information in a way that is legible by computers or (trained) humans. Unlike HTML, XML and its ilk have no set tags; rather, the organizational system is designed and customized by users. While this makes the language very flexible, it means users have to agree on a set of tags (or schema) (Goldberg 2009, 114). XML tags can be used to mark formatting, by describing text as bold, for example. More usefully, however, it can describe the semantic content of text, by describing it as a heading, body paragraph, sidebar, biography, test question—whatever designation is most useful. A document marked up for content can be used, in combination with stylesheets that dictate formatting rules for specific types of content, in a number of formats with relative ease.

The utility of XML is important for publishers because, in the words of Michael Tamblyn, it allows reusability, segmenting, format conversion, and portability of files (Tamblyn 2009). Similarly, Jean Kaplansky, in her article “XML and the many facets of publishing,” lists a number of benefits to an XML workflow applicable to particular realms of publishing (Kaplansky 2010). First, XML can minimize intervention: XML markup allows consistent processing and a partially automated workflow. Once content has been tagged, it requires less intervention from editors, designers, and compositors

to reorganize, reformat, or reuse. Second, structural markup can help maximize accessibility. In educational publishing (urgently) and all other fields (ideally), accessibility of texts to persons with disabilities is crucial. Tagged content and segmenting (i.e., clearly marked structural elements) make it possible to tie text to audio and to navigate smoothly from one section to another with an accessible interface. Finally, an XML workflow paves the way for innovation: it allows publishers to experiment with format and novel uses of content. Kaplansky gives examples of educational publishers creating tests with the capacity to judge and adapt to responses; book content repackaged as merchandise like playing cards or calendars; and content marketed to multiple audiences simultaneously (e.g., student and teacher editions of a text, or different editions for different age groups).

Kaplansky writes from an educational publishing slant, but these opportunities should be priorities for all publishers. Accessibility for persons with disabilities is a necessity in every case. Canadian publishers, already on shaky footing after a global recession, are losing arts funding; the efficiency of an automated workflow can free up limited resources, allowing these publishers to take on more projects. Publishers are very familiar with content repurposing but unfamiliar with new platforms, and experimenting with format takes on new importance in an age of iPhone apps, social networking sites, and multimedia endeavours.

XML is already a staple for a number of businesses (O'Reilly 2008; Klopotek 2010; Wiley; Tamblyn 2009). As Sperberg points out, most of these are large educational or scientific, technical and medical (STM) publishers, as such companies can more easily afford to invest in technology and professional development and are also more apt to repurpose content than trade publishers. Initial resource investment can be higher in an XML-based project, but for most publishers that repurpose content (i.e., publishers that produce at least hardcover and paperback editions of the same book), it is a lower resource investment overall. However, many independent companies are working with small margins and limited cashflow, and for these companies, any transition that requires upfront expenditure or increased demands on staff is impossible to make.

As it stands, these demands on staff are significant. XML can be

used most efficiently when text is marked up for semantic content (the O'Reilly model), which means authors and editors need to be trained in the markup language and must take on more work per project. Current XML editing tools, like oXygen, are complex and lack the intuitive quality that makes technologies successful (Tamblyn 2009). Wiley Publishing's model, using custom styles in traditional word-processing software and converting these to XML with custom software, requires a huge initial investment of resources in terms of expensive software and staff training, so this option is out of reach for most companies. Free, open-source programs are a good option for these publishers, but such programs lack in user friendliness even as they excel in utility and accessibility.

These limitations notwithstanding, XML glimmers like a mythical beast to some. Consider the Agile Publishing Model discussed by the owners of the publishing company Pragmatic Programmers, Dave Thomas and Andrew Hunt, at the 2010 Tools of Change conference. The Agile Manifesto, co-created by Thomas and Hunt as a software development model, privileges individuals (employees and customers both) over traditional business strategies, as well as innovation over routine (Beck et al. 2001). Companies that practise agile strategies are, therefore, faster to adapt to changing technology and more inclined to take risks. Pragmatic Programmers, is hosted entirely in the Cloud, and authors submit manuscripts already tagged with XML (Rankin 2010). Thomas and Hunt boast not only about the portability of their business but also about their low overheads and high royalties—made possible, in large part, by the efficiency of XML and an automated workflow. The company is able to prioritize authors and customers as a result: more resources can be devoted to royalties and customer service. The company is also on the bleeding edge of developing technology. However, the nature of their books (largely manuals about software development or agile strategies) means that the authors and employees are already competent with XML and that the layout and design are formulaic; as one blog pointed out, Pragmatic Programmers is lucky to be “at the nexus of Awesome and Automation” (Pragmatic Bookshelf 2010 and Rankin 2010). Few other publishers find themselves at the same intersection.

One reason Pragmatic Programmers is able to cut costs and increase royalties is the extra work taken on by the authors. This option is unavailable to most publishers not only because most authors are not equipped to use XML, but also because the language is sometimes unique to the user or organization. Authors would need to be trained in both the language and the company's tag system or chosen schema; it is difficult to imagine Random House or even D&M Publishers undertaking this. O'Reilly and Wiley have it right: semantic markup must fall to in-house editors.

So what do editors need from XML? To begin with, any training required must be fast and cheap. Most publishers will make the transition only if investment cost is low: the software must be cheap or free, and training time short. More than this, though, Tamblyn jokes that editors are still resistant to moving from pen and paper to the screen (Tamblyn 2009). A successful user interface will incorporate the aspects of a pen-and-paper editing experience that are currently lacking onscreen. These might include the ability to judge progress through a document and to pull up and compare any desired pages, the portability of a paper manuscript, and the satisfying sensation of striking through an errant adverb with one's sharpest pencil. In addition, many editors find errors in print they miss onscreen (Hart 2000); whether this is an effect of psychology or image clarity, it merits consideration. This is a tall order: software with the intuitive navigation and inherently tactile benefits of pen and paper but the utility and extension of XML. Perhaps this combination is the true unicorn of publishing. Plain old XML is nothing magical—just a trusty steed.



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# Forget Repurposing, Multipurpose Your Content

VANESSA CHAN

Kathleen Fraser makes a strong case for the value of an agile XML workflow from an editorial perspective. In this essay, Vanessa Chan demonstrates how we might harness the practical powers of XML, not only in repurposing but also in generating new content. Multipurposing content holds a lot of potential for publishers, writes Joy Gugeler; if publishers “cherry-pick the list” with certain types of content, multipurposing may evolve into “an organic acquisitions or publishing strategy.” In her exploration of online forms, Vanessa Chan gives us a place to start, urging content creators to begin with format-neutral content, which can be more easily tailored to the needs of readers.

*Vanessa Chan is a blogger, freelance designer, manga enthusiast, and martial artist. She is all for multipurposing content. Why? As Bruce Lee says, the perfect way is only difficult for those who pick and choose.*

KEYWORDS: FORMAT-NEUTRAL CONTENT, MULTIPURPOSING CONTENT, MULTICHANNEL PUBLISHING, REPURPOSING CONTENT, EDITORIAL WORKFLOW, BLOK

MULTIPURPOSING CONTENT MEANS that writers should start with format-neutral content. Susan Webber of Harvard Business School Publishing summarizes this idea by explaining that writers should not produce content that is print centric, but format-neutral content instead (Really Strategies Blog 2009). That way, content can be used in multiple formats to capture a larger audience. Extensible Markup Language (XML), then, is something that bloggers should consider utilizing.

XML allows multichannel publishing where the same input can produce different outputs without modifying the data within the content management system (Case 2009). Essentially, XML streamlines the process of producing multiple forms of the same raw, underlying content. When framing XML in relation to content, the strategy of creating content and repurposing afterwards seems the most obvious. However, rather than thinking about ways to repurpose content after it is created, content creators can think about how to multipurpose content before it is produced in order to achieve the ultimate goal for bloggers: to disseminate information to as large an audience as possible.

Multipurposing content is not to be confused with repurposing content. Repurposing is repackaging and reformatting existing content into new contexts or in different media to possibly extend the life of the content and capture more readers while retaining existing readers. Multipurposing means writing with the goal that the content will be turned into different formats to capture a larger audience during its release (Stevenson 2007).

It is to the writer's benefit to make content into multiple forms to gain a larger readership, especially for time-sensitive material. Multipurposing content can be achieved by adopting XML technology. XML consists of markup texts that resemble HTML but, unlike HTML, XML allows the user to define and shape the tags. This means that tags can be customized to make the coding understandable to the user. Effectively, XML structures content as the user sees fit.

One unique method of delivering content is a blog. Bestselling sci-fi author, blogger, journalist, and technology activist Cory Doctorow states that blogs exist "for the artistic satisfaction of writing" and turn "the old publishing rules on their head" (as qtd in Jones 2009). A blog reverses the publishing market in which writers write about what they are

interested in and attract an audience to it afterwards, rather than seek to find an audience before writing for that audience. The implication, then, is that bloggers tend to write for the satisfaction of spreading their ideas to a large audience while others write for profit. Many bloggers rely on only one delivery method for their content: their blog. This can be limiting in terms of disseminating information because it attracts only a certain type of reader: the ones that enjoy reading blogs online. There may be other types of readers with the same interests but who refuse to read content online. A blogger can capture the other readers simply by multipurposing content to offer different methods of presenting that same content. This is where employing XML technology can help.

XML can help writers disseminate ideas to as wide an audience as possible by beginning with a well-tagged XML document. Offering multiple formats of the same content can arguably be more effective than having only the printed book. Writers can take advantage of both the print and online channels to host the same content. Doctorow's comparison between online and print best illustrates the effectiveness of this idea. He states: "a traditional publisher could put 2,000 printed copies of a book on the shelves, but online, those same 2,000 copies can reach a wider audience across the world" (Jones 2009). If content online can reach a wider audience, why not have both online and printed versions of the content and capture both audiences? It is important to note that the print and online audiences can, and often do, overlap. However, since XML can be a cheap and quick way for bloggers to multipurpose content, it is worthwhile to consider it.

The best way to start multipurposing content is to begin the editorial workflow using the web as a platform. Content produced on the web can be defined through XML in real time, which allows that content to be prepped for easy reassembly into multiple forms once it is published online. By starting the workflow online, right from the beginning, the writer is able to work with a well-tagged XML document that can be used to produce multiple formats of the same content both quickly and easily.

XML can allow contents to become a blog, a "blook" (blog turned print book), a Really Simple Syndication (RSS) feed, a printer-friendly format, or a custom compilation print-on-demand book. Because the

content is not fixed to a specific format, the reader can choose how they want to read the content without spending extra time to format it themselves (Content Data Solutions 2006). The blog is already an HTML document, a form of XML, making it easy for bloggers to utilize XML. For example, some readers may prefer reading longer blog posts in print. By offering the option to reformat blog content into a printer-friendly version, the user does not have to copy and paste the web content into a word processor before printing.

Another way for bloggers to offer readers yet another form of the same content is to take advantage of RSS feeds. RSS feeds employ XML in order to transform blog contents into a feed that goes directly to the user. By offering the RSS option on the blog, it allows users to stay attuned to the blog. The content is formatted into another form that the RSS reader can use to deliver to the user. Not only does XML change the way the content is formatted, it also allows for a different way to deliver information. Content goes to the user rather than the user going to the content.

A recent trend towards reformatting blog content is to turn it into a book. Dozens of new businesses, like [blogbasedbooks.com](http://blogbasedbooks.com) and [blurbs.com](http://blurbs.com), now offer web-based services to help bloggers turn their blogs into books through XML. The idea behind these services is to eliminate the need for the user to format the layout and editing of the blog content as much as possible without having to download or purchase additional software (Kharif 2006). Many blog posts contain hyperlinks and comments that are tedious to remove. Therefore, the online services will strip them out of the blog entry automatically, reducing production and editing time.

These are examples of different ways to multipurpose content, which enable bloggers to gain a wider readership and share their ideas by catering to the reading preference of their audience and by reaching them in spaces (online, print, etc.) they most enjoy. XML makes it easy for bloggers to offer their content in multiple formats to different types of readers.

But if readers have the benefit of so many free forms at their disposal online, will they (a) have a desire to return to that content and (b), if they do, will they be willing to spend money to access that content in another

format? Entrepreneurs and publishers alike worry that, when given the choice between purchasing content and reading free online content, readers will invariably choose the latter. Doctorow argues, however, that free content can be a gateway to sales, stating:

a tiny minority of downloaders treat the free e-book as a substitute for the printed book—those are the lost sales. [However] a much larger minority treat the e-book as an enticement to buy the printed book. They're gained sales (2006).

Many readers are individuals who are resistant to the idea of reading online and are likely to buy the printed book whether or not they know that the online version exists, because they simply prefer it. At lulu.com, an online self-publisher, a significant number of books on the top-sellers list are based on website and blog entries. Examples like those offered by Doctorow demonstrate that not only will readers consume the same content in a variety of forms, but that new forms—such as a print version of the same material—will gain new audiences which otherwise would not be part of a blog's reader demographic.

The idea of multipurposing content is an attempt to capture a larger readership right from the beginning. An efficient way of accomplishing this goal is to employ XML technology and to begin producing content on the web to create a well-tagged XML document. Having a well-tagged XML document allows easy reformatting of the content. Releasing multiple formats at the same time can capture different types of readers with similar interests.



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# Who Wants Yesterday's Papers? The Technological and Social Dynamics of Mainstream News Aggregators

MEGAN LAU

Vanessa Chan details some of the ways in which content can be repackaged to appeal to new audiences. News aggregators, writes Megan Lau, can also satisfy users' needs for customized content delivered with expediency and brevity. John Maxwell contextualizes: "Aggregator-type news sites operate as a part of a much larger and more complex ecology of information and commentary. It's not about authority nearly so much as it's about connectedness." Lau discusses connection and instant gratification at the intersection of technology and culture.

*Megan Lau is a blogger, graphic designer, magazine enthusiast, and part-time goat farmer. She is the production manager and a contributing editor for Sad Mag ([www.sadmag.ca](http://www.sadmag.ca)), Vancouver's premiere arts and culture quarterly, featuring the artwork and writing of the city's best emerging artists. Megan tweets @megan\_lau and blogs on [megan-reads.blogspot.com](http://megan-reads.blogspot.com).*

KEYWORDS: NEWS AGGREGATORS, NEWS COVERAGE, SOCIAL DYNAMICS, DIGITAL NEWS, TECHNOLOGY

AROUND THE WORLD, eight million people wanted to be able to find up-to-the minute local and international news, pictures from the newest *Sports Illustrated* swimsuit issue, and vibrant commentary on US national politics in one place online. In 2005, celebrity writer and political commentator Arianna Huffington answered the call and co-founded the *Huffington Post*, a news aggregator blog, with former AOL executive Kenneth Lerer. In 2008, it attracted \$25 million in venture capital. In 2009, it set up a \$1.75 million fund for the production of original investigative reporting. With eight million unique viewers a month, the *Huffington Post* is now a direct competitor to the *New York Times* (Pilkington 2009). Given the blog's success in gaining audience share and revenue, and the Grey Lady's steady decline in revenues, an aggregator model may be the way forward for U.S. news media in the digital age.

As the most successful and influential news aggregator site online, the *Huffington Post*, along with the *Daily Beast* and *Gawker*, sets the standard in terms of speed, quality, and editorial mix for news production. News aggregators influence the delivery, content, and consumption of mainstream news. In the age of constant and instant connectivity, the news we consume is delivered faster, generally shorter, and tailored for our personal and political preferences.

Aggregators offer readers a mix of pop culture, politics, and commentary. The *Huffington Post* employs more "citizen journalists" and amateur writers, while Tina Brown's *Daily Beast* leaves the writing exclusively to high profile authors and celebrities. *Gawker* is distinctive for its sardonic tone and focus on celebrity gossip aimed at Generation Y. Where traditional news sites offered a combination of original reporting and wire news, news aggregator blogs mostly repurpose content. (At the *Huffington Post*, two-thirds of content is aggregated from other sites [Pilkington 2009]).

*HuffPo*, as Huffington's site is often known, is powered by hundreds of contributors including formidable figures such as Lawrence Lessig and the late Walter Cronkite. With just 60 staff members managing 800 contributors and endless content at breakneck speed, concerns have been raised about the blog's editorial processes and journalistic standards (Pilkington 2009). The *Guardian* reported that Huffington encouraged

her writers to practice “sedentary journalism” during the 2008 presidential election campaign (Pilkington 2009 and Boczkowski 2009, 59): writers scanned online reports and listened to candidates’ conference calls instead of working in the field. Furthermore, since the aggregator model invests less in journalism and more in monitoring, filtering, and optimizing content for search engines, the costs for content—in terms of time and money—are relatively low. The operational efficiencies of *HuffPo* and similar sites have incensed professional journalists but I take a determinist view and maintain that aggregators are an inevitable and valuable result of Internet technology.

Information is more abundant than ever since the Internet virtually eliminates the barriers to entry for publishers. As a result, we face information overload. At the 2008 Web 2.0 Expo, Clay Shirky argued that information overload has been a part of all western cultures since Gutenberg (Shirky 2008). While the problem hasn’t changed for five hundred years, the economics have. Since the online publisher—who is often the creator/author—assumes little to no financial risk in offering a song, a video, or a novel online, “the filter for quality is way downstream from the site of production” (Shirky 2008); in fact, usually *you*, the end target, are the filter. There is more to read than ever, and it is simply impossible to sort through everything yourself. Sometimes finding information through Google, perhaps the most powerful filter out there, can be difficult since it does not search semantically. As Shirky would agree, more effective and more meaningful filters are needed. Sites like the *Huffington Post*, the *Daily Beast*, and *Gawker* are prototypes for a better news filtering system for the Internet. News aggregator sites serve the need for a human to sort through some of the available information and deliver the facts in plain English.

“Seriousness is necessary to signify the importance of the news, but a certain amount of informality might enlarge the audience and increase its attention even as it underlines the importance of serious, formally told news,” says Herbert J. Gans, (2009, 24); Gans uses the poignant example of Walter Cronkite breaking down at the news of President Kennedy’s assassination. As such, commentary from edited aggregators such as the *Huffington Post* favours a more colloquial tone. Consequently, journalistic standards, which require the author to maintain objectivity,

to establish accuracy, and to prove the authority of their sources, are left by the wayside. But for Michael Kinsley, reformation of journalistic standards might not be such a bad thing. On *The Atlantic* website, Kinsley, former editor of *The New Republic* and founding editor of *Slate*, wrote:

One reason seekers of news are abandoning print newspapers for the Internet has nothing directly to do with technology. It's that newspaper articles are too long. On the Internet, news articles get to the point. Newspaper writing, by contrast, is encrusted with conventions that don't add to your understanding of the news. Newspaper writers are not to blame. These conventions are traditional, even mandatory (2010).

Kinsley is right on the money in noting that tradition and convention often impeded newspapers. He compares journalistic codes of objectivity and establishing authority through sources to “legacy code”—programming codes left in updated versions of software programs to make them compatible with older operating systems. In short, the rules have changed. News aggregator sites recognized this and exploited it. Now they are making big bucks (Stelter 2008). But I disagree with Kinsley that this shift has “nothing directly to do with technology.” In fact, it has everything to do with technology. In an age when even authoritative information is plentiful, it is inconvenient to read one person's 2,894-word report of a news event (with commentary, longer posts are par for the course). Once given the pertinent information, why wouldn't I go on Twitter and watch it unfold in real time, and even direct questions to people who are at the scene? Part of the need for aggregators is their capacity to distill information about a topic into short posts for quick consumption and immediate discussion.

Finally, the activity at the core of sites such as *HuffPo* is, of course, aggregation. Monitoring and imitating competitors is one most time-honoured, repeated, and intensive work practices across all news media (Boczkowski 2009, 59). Digital technology intensifies these practices and allows websites to borrow from one another without permission under

the fair dealing or fair use provision in copyright. Some consider this theft. In 2009, *Washington Post* reporter Ian Shapira attacked *Gawker* for excerpting large portions of an article he wrote for the *Post* (Shapira 2009). He saw that *Gawker* earned more than 10,000 page views as a result of “cherry-pick[ing] the funniest quotes” and tacking on a snappy title, essentially piggybacking on his work to generate ad revenue for *Gawker*. Despite the ethical or legal infringements (the blogger and *Gawker*’s management admitted the excerpting was excessive [Carr 2009]), *Gawker* did add its own commentary and attitude, which was explicitly directed to its audience (Nolan 2009). The audience recognized its value and shared it with others. *Gawker*’s popularity and its readers’ apathy towards Shapira reflect the demand for news that is tailored to its readership. The *Daily Beast*, *HuffPo*, and *Gawker* all communicate in a distinctive voice that speaks to a mainstream but specific political or cultural group. However imperfect the *Huffington Post*—or any other major edited aggregator—may be as a provider of quality original reporting, its value is in being faster, shorter, and local—sometimes geographically local, but also socio-culturally local.

Says Huffington:

Our guiding philosophy [at the *Huffington Post*] is to embrace editing. We are exercising editorial functions all the time by choosing who to front page. Who to put high up on the home page and keep there... That’s the primary editorial function, is who are we inviting to participate? Each one of our 800 bloggers, whether they posted once or multiple times, have been invited to do so. We’re also getting people who are sending us contributions, and we are evaluating whether we want to include them or not (Tweney 2007).

That means the content on the *Huffington Post* transposes a distinct slant onto the news it delivers. It edits, frames, and provides context. Aggregators exploit the need for news or blog commentary delivered in the *vernacular* of a particular group. To take this thesis further, news via *HuffPo*, the *Daily Beast*, and *Gawker* reflects their readers’ dialect, which is shorter and rapid fire.

Often, those who have a stake in keeping newspapers alive position the future of journalism as a moral issue: paid journalism is right, aggregation is wrong. What they fail to recognize, besides the fact that it isn't a moral issue, is that news aggregation is not the antithesis to journalism; they might even be able to support one another. Furthermore, aggregators provide a service that readers value, and that the market will reward those that give readers what they want. The market does not have a conscience (or as Seth Godin puts it, "the market doesn't care a whit about maintaining your industry" (quoted in *Intern* 2008)). Moreover, through the "linked economy," aggregators also bring attention to newspaper articles that might have slipped away into the digital archives of a newspaper's website otherwise.

The news coverage that the mainstream news aggregators offer is far from sufficient for a healthy public or journalistic discourse; accuracy, balance, depth, and other journalistic values are not their first priorities. The growth of *HuffPo* et al. is impairing the very organizations and workers that support their businesses: newspapers and journalists. Journalism needs a place in the digital age; *HuffPo*'s recent investment in investigative reporting is evidence of its importance and value. However, current efforts to monetize journalism are comparable to the futility of DRM in locking down cultural products. Why should a writer such as the *Post*'s Shapira lay claim to the information he uncovered on the basis that he spent more time than the *Gawker* blogger to make the information available? Whatever new business model for newspapers emerges and however journalistic professional codes are adapted for the digital age, it should not struggle against the stable presence of news aggregators. As I stated, they provide a service to readers.

In the end, I never meant to write about the future of newspapers (besides, that sort of seems decided). I only wanted to highlight the ways that technology and people shape news content in its production and reception. Technology gave us more news and we asked for it to be arranged, distilled, and written the way we like it—and we got that. We also asked for ways to talk back to the media—those technologies were invented, too. All three sites discussed in this paper represent big media emulating independent media, which means we all have a little influence on how we get the news. News aggregators represent the appropriation

of the language, behaviour, and practices of a particular group, and the hybrid media that emerges from combining mainstream news production with technology and social networks. Regardless of the law, and regardless of journalism, the next developments in news publishing will reflect technological realities and cultural desires.



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# The Plight of Contemporary Journalism: Risking Accuracy for Immediacy

TAMARA GROMINSKY

Megan Lau shows how aggregation is changing the way readers consume media; Tamara Grominsky's paper details its effects on content originators. In striving to balance speed of dissemination against accuracy of information, journalists traditionally sacrificed the former to preserve the latter. Grominsky suggests that the immediacy afforded by social media has shifted this balance. "Now, anyone can write and gather an audience," notes John Maxwell. During an age when smartphones are ubiquitous and citizens turn to Twitter before the *Times*, does accuracy in journalism suffer?

*A fan of the beach rather than the snow, Tamara Grominsky has happily relocated from her native Toronto to her now-beloved Vancouver. An ambitious young journalist herself, she writes about citizen journalism and accurate reporting—subjects with which she became familiar while working as a newspaper copyeditor and writer.*

KEYWORDS: JOURNALISM, CITIZEN JOURNALISM, NEWS REPORTING, SOCIAL MEDIA, ETHICS, INFORMATION ACCURACY

TRADITIONALLY, NEWSPAPERS AND news organizations have always competed to be the first to break a story. This coverage gave the newspaper prestige and helped to establish a hierarchy within journalism. Clay Shirky gives this example: “In a notional town with two perfectly balanced newspapers, one paper would eventually generate some small advantage—a breaking story, a key interview—at which point both advertisers and readers would come to prefer it, however slightly. That paper would in turn find it easier to capture the next dollar of advertising, at lower expense, than the competition. This would increase its dominance” (2009). But, if the newspaper broke a story first and the information were wrong, it could be detrimental to the writer’s (and newspaper’s) reputation, and could put them out of a job. It was important to be first, but it was more important to be accurate.

Several measures were put in place to ensure accuracy within journalism. Editors made sure their writers recorded interviews word-for-word, double-checked all sources, and used fact checkers. They did everything in their power to avoid printing a correction.

Now the Internet has thrown everything out the door and has forever changed the way society disseminates its news. In the world of social media, where everything operates in real-time and things can change in the blink of an eye, immediacy is key. Accuracy is something to be desired, but any good publisher knows that, if you don’t say it first, you are already at a disadvantage.

This model of publishing means that those who witness an event are in the best position to report it, and social media has provided various venues to accomplish just this. Social media sites like Facebook and Twitter provide an outlet for anyone to say anything. If someone witnesses a car crash they can post it on Facebook. If they observe a celebrity lurching at a popular restaurant they can tweet about it. Handheld devices like the Blackberry and the iPhone ensure that most people can connect to the Internet at all times in all locations.

This new model has also helped to proliferate citizen journalists and their ability to share content. And this might just put everyone else out of business. Publishers often severely risk (if not sacrifice) accuracy in order to compete with up-to-the-minute updates, and they need to refocus and

incorporate social media techniques if they are to maintain their respect and place within the information world.

When Michael Jackson died in June 2009, the celebrity news and gossip website TMZ broke the story. They posted a short piece reporting Jackson's death, using phrases like "we're told" and "a source tells us." They concluded the article by saying that the story was still developing (TMZ 2009). TMZ took a risk and reported a rumour they did not have time to verify in order to be first. If Jackson's death had turned out to be fake, the website could have lost a lot of credibility (if it had any to begin with). As it was, they were correct and their name was featured on reports by most major news organizations once it was confirmed, establishing them as a reliable source for quick news (Porter 2009).

Websites like TMZ make it difficult for established and credible news sources (for example, the *New York Times*) to compete. Such news sources cannot take rumour risks, such as TMZ's, because they have more to lose. Their reputation is grounded in accurate reporting and in-depth editing. People are willing to turn a blind eye when sites like TMZ slip up, but they expect the *New York Times* to be perfect.

Not only are web-based news sources such as TMZ threatening established news organizations, but so too are citizen journalists. Citizen journalism "is the concept of members of the public 'playing an active role in the process of collecting, reporting, analyzing and disseminating news and information' " (Bowman and Willis as quoted in Wikipedia). Essentially, it is everyday people writing about what they see happening around them. Most of the time, these writers are not professionally trained. As a result, many professional journalists are worried that this new trend in writing may make them irrelevant.

Dan Gillmor, author of *We the Media: Grassroots Journalism for the People, by the People*, says this about the power of citizen journalism: "When people can express themselves, they will. When they can do so with powerful yet inexpensive tools, they take to the new-media realm quickly. When they can reach a potentially global audience, they literally can change the world" (Gillmor 2006). Often, citizen journalists can cover an event via blog, Facebook, or Twitter before an official news organization is even aware of it. They have the supply of labour that

newspapers currently lack, they take advantage of free resources such as social media, and they are willing to do it for free.

As early as 2008, social media sites were being hailed more effective than traditional media at disseminating breaking news. An article in *The Telegraph* reported that during a disaster “researchers found that blogs, maps, photo sites and instant messaging systems were better at providing warnings, help and lists of how individuals were affected than traditional sources” (Bloxham 2008). The study was conducted using surveys to determine the impact of social media during California wildfires and the Virginia Tech shootings. The researchers found that, within ninety minutes of the shootings, a webpage describing the event had already been added to Wikipedia. In addition, a Facebook group called “I’m OK at VT” was created that allowed students to verify that they were safe. The students who were at the scene immediately utilized the Internet and social media to express themselves. The article says “the mass media were unreliable, the study found, as they struggled to access remote areas from which website users with an Internet connection could easily report” (Bloxham 2008). This new publishing model does not leave journalists and publishers guessing at what individuals want to read. The people decide for themselves, resulting in a large variety of content that reflects various voices.

In an effort to keep up with citizen journalists, professional media companies may be sacrificing accuracy and losing an audience as a result. The Pew Research Center for the People and the Press is a survey research project based in Washington, D.C., that studies American attitudes towards the media. According to Pew Research, in 2009, 63% of survey participants felt that news stories were often inaccurate. Although this ranking is 29% higher than survey results gathered in 1985 (Pew Research Centre 2009), it does not necessarily mean that news stories are inaccurate; it simply means that this is how the public perceives them. Either way, it is clear that most people do not have a positive view of the media.

That may be the reason people are changing their information-gathering patterns. In December 2008, “for the first time in a Pew Research Center survey, more people said they got most of their national and international news from the Internet than said newspapers were

their main source” (Pew Research Centre 2009). The study does not specify which Internet sites are providing this information, but it could be a combination of professional sites and social media. Although the findings of this study are not surprising, they do shed light on the dwindling importance of professional news organizations within our global society.

Established news organizations need to determine their place within this new publishing landscape before it is too late. Social media will increasingly take over as the go-to source for current news. Instead of tuning into your favourite television station, simply go online. If you want to know about the status of an event, such as the Academy Awards, use Twitter. You can follow the proper hash tag and get instant updates. If you’re curious about the history of the show, check Wikipedia, which is updated in real time. If you want to know when someone has won an award, look at your Facebook news feed. People everywhere are currently updating the world on what’s going on around them, eliminating the need to wait for the six o’ clock news broadcast or the morning paper.

It seems almost impossible for professional news organizations to seriously compete with the new generation of citizen journalists. Newspapers and news websites do not have the funds or staff to cover the breadth of topics that citizen journalists can cover, although many publishers have been recognizing the importance of social media. I suspect that, in order to survive, traditional media will need to go back to the roots of good journalism: investigative and accurate reporting. As Clay Shirky says:

society doesn’t need newspapers. What we need is journalism. For a century, the imperatives to strengthen journalism and to strengthen newspapers have been so tightly wound as to be indistinguishable. That’s been a fine accident to have, but when that accident stops, as it is stopping before our eyes, we’re going to need lots of other ways to strengthen journalism instead (2009).

Professional writers will always hold a certain cachet, and they need



to use this to their advantage to regain the integrity of journalism. Professional journalists have two tools at their disposal: their formal training or education and their emerging social media techniques. By combining the two, they can define the future of digital journalism. Instead of the traditional daily news cycle that newspapers use to gather information and prepare it for print, digital journalists work on real-time deadlines. But this is no excuse for a less-than-perfect story. As the shift from paper to Internet continues, writers will need to hone their skills and learn to embrace all forms of journalism. What will emerge is a kind of super-journalist: someone who can write, tweet, post a picture, and capture a video, all within an hour or so.

As writers and news organizations embrace this new type of publishing, they will have the opportunity to set an example for citizen journalists everywhere. If professional journalists can provide up-to-the-minute information in various mediums that can be accessed anywhere online—all with an eye towards journalistic standards—citizen journalists will have no option but to increase the value of their own work. As the author of a recent article at Gawker.com wrote, in order for excellent blogs to differentiate themselves from their competitors, they “must also now write tight, concise headlines, choose decent pictures or art, and provide readers with more evidence of journalism” (Somaiya 2010). This does not signal the end of journalism, but a new, fresh beginning that will see the limits of creativity and skill pushed in new and exciting ways.

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# The Book Oven and Self-Publishing

EVA QUINTANA CRELIS

The growing viability of print-on-demand technology has flooded the market with companies offering self-publishing services. Eva Quintana Crellis highlights Book Oven, a collaborative model that stands out in a sea of packagers. Book Oven works closely with authors—from submission to production—prioritizing content quality over revenue. Because Book Oven helps unpublished authors to find distribution channels without sacrificing quality, John Maxwell is confident that Book Oven will “save the lost masterpieces languishing in desk drawers from obscurity.”

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KEYWORDS: PRINT ON DEMAND, POD, BOOK OVEN, BITE-SIZE EDITS, SELF-PUBLISHING, LULU

SWAMPED IN A colossal online market of print on demand (POD)—a market that's growing by the minute—with websites like Lulu and CafePress, Book Oven seems to be just what the Web needed. While Lulu and all the rest offer great help in self-publishing, targeting the consumers as opposed to the creators, Book Oven focuses on the creation part of the self-publishing process; thus, its workings are deeper and more personal than those of all the others.

As an example of the growing online marketplace within which Book Oven itself operates, let's take a look at Lulu. This digital marketplace for self-publishing enables writers to bring their work directly to the audience they intend to reach. How does it work? The creators upload their work and then use Lulu's tools to format it digitally (Lulu also offers editorial services such as proofreading and structural editing). The authors choose the size, cover, and binding type of their book and then leave the printing to the company. They get the number of books they need and can reprint at anytime. Since the authors are in charge, they set the price and get 80% of the revenue. Lulu's website states that, "while traditional book publishers in the United States publish roughly 120,000 books a year, Lulu alone published 98,000 new titles globally, created by some of our almost 1.3 million registered users" (Lulu 2010).

What sets Lulu and Book Oven apart is the latter's core mandate. While Lulu's operations are all about the consumer aspect of self-publishing, Book Oven works closely with the authors to help create the best of their published works. Book Oven is an online community that gathers creators in need of feedback and, if necessary, helps to push creators out of their writer's block. How does Book Oven do this? Book Oven works through the interactive development of creators' own work and the distraction and inspiration of working on some other writer's text.

Book Oven helps authors right from the start—from the stage of turning in their manuscripts to publishing support to the finished book. It is intended for writers, of course, but also for editors, designers, and small presses. Book Oven is a virtual place where people get together to create the best books possible. The website acknowledges the premise that no book is made by one person alone, and it manages to get experienced creators together, working as a team; readers who can give useful feedback, editors that better the content, proofreaders who make it clean,

and designers that work on its looks. Book Oven's collaborators can reach for the help of strangers to better their work, or they can connect with friends and colleagues through the website. As Book Oven's website states, "in the end, though, it's about building communities: the smaller communities that form around writers and their works, and a larger community of writers, readers, editors, proofreaders, designers, and book lovers of all kinds" (Book Oven 2010).

Book Oven was co-founded by Montrealers Stephanie Troeth and Hugh McGuire (also the founder of LibirVox.org, an all-volunteer project to make audio books out of free public domain titles). They connect with writers through the Book Oven website and through Twitter, and the regular feedback they get from subscribers helps them constantly improve the website's features.

One of Book Oven's features is Bite-Size Edits, a unique way to proofread the collaborators' texts. "Bite-Size Edits," says the website, "chops a text up into sentences and serves them at random to proofreaders, either in private to the project owner, to a small group, or to the world at large. If you can believe it, Bite-Size Edits actually makes proofreading fun—and addictive" (Book Oven 2010). Taken out of their old context, the sentences are regarded in a different way, and it's easier for the reader to detect errors and structure problems. "Bite-Size Edits decontextualizes content, making it easier to spot mistakes" (Book Oven 2010). The system finally reorders the sentences and puts the text back together. This new way of editing might prove to be very effective, as it can bring a fresh view to text that has been read too many times. Also, if there are many readers, the final proofread text can get a lot cleaner than if it were traditionally proofread.

To start working in Book Oven, writers can start a text on the website or they can upload an existing manuscript. If they don't have any contacts with whom they want to share their writings, they can find someone on the site. The editors leave annotations in the margins of texts, and the authors can either incorporate them in their writings or simply dismiss them. There's also a feature that lets particular readers or editors make definitive changes to the text after getting specific permission to do so. If the authors want, their work can be totally opened to the world. When the text is finished, the author can generate an EPUB or HTML

file, and eventually a PDF formatted text for POD. Book Oven has an online store where the authors can sell the EPUB and the POD finished products.

Book Oven could soon adopt Creative Commons Licences. The idea is that, in the future, the website will find a way for collaborators to get paid for their services. As for copyright, authors keep all copyright on their own projects, but none on the edits they do for other people's projects. Authors who are anxious about piracy might be reassured, thanks to Bite-Size Edits, for the readers get only small fragments at a time. But even if an author chooses to share his or her whole file, copyright of most countries ensures that the author owns his or her original work as soon as it is committed to a "fixed" format, and typing it on the computer would be just that.

### **Getting rid of the middle man**

There's no doubt that the Web is changing the world, the way we think, the way we connect with others, and the way we work and deliver the results of that work to interested and worthy hands. Only forty years ago, if authors wanted their work published, the only choice they had was to turn to a publishing house. While doing so, they usually had to face the worse disappointments imaginable. Extreme examples abound. John Kennedy Toole was one such example. His novel, *A Confederacy of Dunces*, was published in 1980, which was more than a decade after Toole killed himself. The fight was tough for this author. His manuscript, which is now generally regarded as a comic masterpiece, never convinced a single publisher during his lifetime (Simon & Schuster was close to committing to a contract, but backed out at the last moment). Toole was posthumously awarded the Pulitzer Prize for Fiction (Wikipedia 2010).

Ignatius J. Reilly, the main character of *A Confederacy of Dunces*, found his way into global readership through the old, traditional channels: after the death of her son, Toole's mother showed the novel to a university professor who loved the book and sent it to several publishers until an editor got on board. Would anything be different for Toole today? Yes, he would be able to print his book on his own and have it de-

livered to the readership without the help of a publisher. He would probably start small: at first, he'd sell a few copies of his self-published book to friends and family; he might get a few academics to buy it too, and he'd probably give away a lot. If he were lucky, the book would make its way to the desk of a well-respected critic, who might write a great review and take the novel to the stratosphere. Even if we take the critic out of the equation, Toole might manage to promote his book through the Web, and little by little—or as fast as lightning, as things happen today, thanks to the Internet—readers would change everything just by passing their excitement forward, by talking about this novel to all of their online friends, and all of them to all of their friends. With Book Oven, Toole's story might have been a completely different one. The success of his book could have prevented his suicide—which apparently was motivated, at least in part, by the publishers' harsh rejections.

Of course, there are many Ignatiuses in the history of publishing, exceptional characters who barely saw the light and who finally were published almost by chance. Sadly, there must be thousands never to have been removed from the inside of a drawer.

Distribution of content is now colossal. A few years ago publishing channels were closed to a huge number of great authors, and a number of brilliant works were rejected by busy publishers or because their authors just had the wrong friends. Nowadays, when an author who is rejected by mainstream publishing takes their manuscript to Book Oven, they build a community of comment from peer writers who help to develop and improve the book. Now everyone can make a small effort and get their "work" published. Things have definitely changed.



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# Pix or It Didn't Happen: Social Networking, Digital Memory, and the Future of Biography

CYNARA GEISLER

Mary Schendlinger writes: “When one edits (and reads) biographies, one looks not only for accurate, interesting, well-organized information that tells a story and illuminates a life, but also for the presence of the biographer: a guiding intelligence that interprets the data, pointing out themes and threads, connecting incidents and documents, sorting and riffing on anecdotes supplied by others, and making some educated, compassionate guesses about what it all means.” So what is the role of the biographer, now that social media puts these tasks in the hands of the subject? Cynara Geissler drives home the point introduced by Eva Quintana Crellis: the accessibility of information in the digital age demands more, not less, curating.

*Cynara Geissler is a social media enthusiast, critic, poet, copywriter, and fatshion plate who, in her spare time, occasionally sleeps and eats. (The latter trumps the former). You can find her in the cloud, tweeting her breakfast, facebooking her lunch, and creating Lolcats over dinner, er, noms.*

KEYWORDS: BIOGRAPHY, DIGITAL, SOCIAL MEDIA, TWEETS, FACEBOOK, PRINT, SOCIAL NETWORK, TENACITY OF PRINT

THE 2008 CREATURE feature *Cloverfield* includes all the things a good horror movie should: jubilant destruction of recognizable landmarks, heroes who are as plucky as they are clueless, and social commentary in the form of a ferocious monster who both represents and amplifies the fears and preoccupations of our cultural moment.

The most successful monster movies of the past fifty-odd years explore society's deep-seated anxieties about fraught topics. In the original *Godzilla* (1954), for example, the monster's irradiated origins speak to a fear of nuclear warfare (and its potentially hideous consequences). The 1956 version of *Invasion of the Body Snatchers* reveals an increasing fear/mistrust of the medical profession—psychiatry, in particular—as the protagonist doctor fails to diagnose that patients are, quite literally, not themselves: they are, in fact, being replaced by pod people.

What's striking about *Cloverfield* is that the monster's behaviour is less alarming than the behaviour of the characters trying to escape his dinosaur-like jaws and oversized mantis clutches. Scene after scene, people are all-consumed with documenting the beast: extras scramble, oblivious, through the crumbling streets with camera phones raised; one character is devoured trying to get a good shot of the beast's head with his camcorder. Their obsession is so powerful that they would rather die with cameras rolling than give up their devices and escape. For the characters in *Cloverfield*, the life undocumented is, quite literally, not worth living.

It's a little bit—okay, a lot a bit—dramatic to suggest that our drive to document our lives has reached a point where it has taken precedence over our instincts to (safely) live them. It is, however, undeniable that in our current digital and technological landscape in which smart phones are ubiquitous, omnipresent, and capable of uploading images, text, or media files to social media platforms within seconds—the impulse to digitally diarize is powerfully present in many (if not the majority) of our social interactions. The smart phone's ubiquity is evidenced in Anna Reading's article "Memobilia: The Mobile Phone and the Emergence of Wearable Memories," where she suggests that more than a portable communication device, the mobile phone is "a wearable archive that can be both deeply personal and playfully, as well as seriously, panoptical" (2009, 92). Reading cites a study by Richard Wray: "by the end of

2008 half of the world's population owned a mobile phone" (quoted in Reading 2009, 83).

A handful of years ago—just before I had my first cellphone, and long before it was possible to get properly Twitterpated—I facetiously predicted dinner parties where the guests conversed via cellphones—texting their opinions on the menu, guestlist, and decor—instead of verbally addressing one other. Now, in 2010 when, as scholar Anna Reading argues, the mobile phone ought to be renamed “the memobile” because it has evolved from “handy communication device” to an “emergent form of digital memory ... a wearable shareable multimedia data record of events and communication”, such a scenario no longer seems absurd (2009, 81). It is easy and intuitive—maybe even irresistible—to digitally narrate the story of our lives as they occur, to measure out our afternoons, movements, and musings in tweets, Facebook status updates, and tumbls, as our own almost-automated autobiographers.

On the one hand, I sometimes fear that we're losing the art of long-form conversation and whinge that my enjoyment of events/the company of others is compromised by the feeling that every moment is performed (for digital distribution and consumption) as much as it is lived. On the other hand, the activist in me is moved by the notion that social media platforms may well be democratizing the creation of history and of cultural memory, and granting more people than ever access to an audience and voice. Indeed as digital biography scholar Paul Longley Arthur observes in his article “Saving Lives: Digital Biography and Life Writing”:

Anyone with access to commonly available digital services and devices can self-publish online, reaching a potential audience of millions in an instant. It is astonishing how quickly the Internet is widening the reach of people's stories and allowing immediate connections and exchanges in ways that print never could (Arthur 2009, 46).

In terms of increasing access and representation, digital, online biographies seem to be nothing but a good thing. Still, as a paper and

ink-enamoured publishing student, I am preoccupied with the continued viability of p-books and wary about unexamined privileging of digital forms. With new media scholars like Andrew Hoskins identifying a rise in confessional culture, a “mediatisation of memory” that is replacing the “personal writing and production of memory (scrapbooks, diaries, photographic albums etc.) of the past” with “a social network memory” (Hoskins 2009, 30), it would seem print biography in particular is in a perilous position.

If, as Arthur posits, we’re witnessing a shift where people are abandoning private and personal “established forms such as diary writing, memoirs and other-print based records” such as letters and cards “in favour of public, dynamic and immediate forms of communication in cyberspace,” it seems the ways in which biographies are constructed, composed, and consumed should necessarily shift as well (2008, 50). The ready availability of up-to-the-second personal content—life-caching—online from a huge cross-section of compelling people from all walks of life would more than sate our appetites for glimpses into the *private* worlds and inner lives of people whose lifestyles are markedly different from—or comfortingly similar to—our own. Yet you only have to take a cursory glance at bestseller lists, Amazon rankings, and bookstore shelves—on a recent trip to Chapters Indigo I noted biographies command a dozen cases of bookstore real estate—to see that interest and sales in conventional print biography remain palpable (*pulpable*) and robust.

One possibility that arguably accounts for print tenacity is the notion that readers are deeply attracted to genre. Biography has a strong, familiar set of guiding conventions and principles that readers expect and desire to encounter, the power of which, it seems, should not be underestimated even as “Web 2.0 interactivity transforms expectations and has begun to render archaic even recently developed sites constituted through earlier technologies” (Jakubowicz 2009, 110). Digital media scholars like Joanne Garde-Hansen have—quite reasonably—made much of the fact that social networking sites like Facebook rely, “like many digital media objects, on a computer database logic rather than the narrative logic of older media” (Manovich as discussed in Garde-Hansen 2009, 141). Garde-Hansen explains:

Facebook is a database *of* users and *for* users; each user's page is a database of their life, making it a collection of collections and collectives. Databases, in themselves, do not 'tell stories; they do not have a beginning or end; in fact, they do not have any development, thematically, formally, or otherwise that would organize their elements into a sequence (Garde-Hansen with Manovich 2009, 141).

Relying on the work of *The Language of New Media*, scholar Lev Manovich, Garde-Hansen asserts that "database and narrative are natural enemies, the former refusing order and the latter insisting upon it" (142) and that the "anti-narrative" structure more closely mimics the nature of human memory than any other form. When time is represented as a permanent spatial montage where a user might "accumulate endless texts, messages, notes, and data, just as a person going through life accumulated more memories, with the past slowly acquiring more weight than the future" (143), it is tempting to believe social network memory would lead to the development of a social network biography, but the preferred way to consume the form—as a narrative organized by theme and chronology—persists.

Of course, like everything, there are exceptions. Jay Leyda's *The Melville Log* is a curious print biography that uses montage—albeit a chronologically organized one—"juxtaposing bits and pieces of letters, business documents, journals, and Melville's work" (Visel 2007, par. 5). Leyda believed "A 'document' should be distrusted as much as a photograph, for documents are as fallible as their human authors" (quoted in Visel 2007, par. 5) and curated the flotsam and jetsam of Melville's life to provoke readers to look at each thread with a critical eye.

On the multimedia front, interactive digital biography forms (e.g., CD-ROMs) have emerged that are organized in non-temporal database format "of many discrete media elements related to an individual person, including video clips, photographs, and text articles" (Wikipedia 2010). As well, online biography applications and repositories like [annknips.com](http://annknips.com) allow users to compile and illustrate their life stories. That no particularly compelling multimedia biography projects immediately

spring to mind is rather telling—they are simply not as common, or as sought-after as the well-travelled, well-respected print form.

In a recent lecture to MPub students on service design, creative director Haig Armen noted the fact that, in this age, the rise of on-demand audiences are not just looking for unfettered and rapid access to content. Quite the opposite, he argued “people don’t want to curate their own content for themselves. We are swimming in a huge sea of content. People are willing to pay money for that filtering of content” (Armen 2010). Digital content, while fast-moving, is no more infallible or impervious to hyperbole, alteration, egregious errors, stilted prose and sheer inanity than its (romanticized) tangible hard-copy predecessors. The core role of the biographer—to follow threads, marshal facts, and to edit lives for maximum interest, meaning, and context—has not fundamentally changed or been supplanted. Sure, we can spew raw text, images, and video online, at lightspeed, but few among us would argue that this hastily uploaded content constitutes a golden yarn. There is continued value in the careful packaging and presentation of content, and more than that, expert, inspired organization of materials creates value where it might appear—to the unwashed masses—that none exists.

While online social networks have changed the format of the archive—and arguably expanded it, not least in terms of minutiae—the role of (print) biography remains, to feed our need for narrative structure. This era of information glut will require a biographer who is that much more dedicated, savvy, and diligent in navigating and authenticating rapidly shifting personal archival mechanisms and protean digital forms.

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# Is Facebook the End of the Yearbook?

ELIZABETH KEMP

Cynara Geissler firmly believes in the longevity of traditional editorial roles in the face of auto-curating social media; Elizabeth Kemp, in her article, thinks their disease is terminal. Citing Wikipedia's triumph over its print counterpart, Elizabeth considers the yearbook's fate. After all, as Joy Gugeler puts it, "being able to search, use OpenID to link to people I email or know on other sites, edit, unfriend, tag and untag, and constantly evolve my own memory of high school (or any era for that matter) is much better than a dust-gathering hard copy that freezes unhappy or irrelevant moments in time."

*Elizabeth Kemp missed her calling as a hairdresser, but is destined for the corner office where she can fondle handmade paper in peace. Liz wouldn't mind if yearbooks survived because she has never in her life taken a bad photograph.*

KEYWORDS: DIGITAL, PRINT, FACEBOOK, YEARBOOK, SOCIAL MEDIA PLATFORMS, SOCIAL NETWORKS, CROWD SOURCING

*Dear Yearbook,*

*The last four hundred years have been totally awesome! I'm so glad we got to know each other! It's been crazy, though, hasn't it? Remember when you tried to become a video?!? Wow—that didn't work! And I know it's totally been tough on you this decade, but stay true, old buddy! I'm totally going to need you in 10 years when we have our reunion and I can't remember who anyone is!*

*Have a great summer!!!*

Recently, *The Economist* reported slumping sales of high school and college yearbooks. Citing the rise of electronic media, and the resulting decline of print, the article called the yearbook a “dinosaur” when compared to its more versatile online counterparts (A tradition in decline 2008). The yearbook is an historical record of a student’s time in school, but it also has sentimental value: it is a work of reference most useful for reminding the owner of days gone by. Now that digital content has more or less replaced works of reference in print format (i.e., the encyclopedia), the end of the traditional print yearbook is likely.

In the seventeenth century, students pasted memorabilia into blank scrapbooks. In 1845, the first official yearbook, *The Evergreen*, was created by the Waterville Academy in Waterville, New York (Arnold & Duffy 1991, 7). A letterpress process using halftone printing became available in the 1880s, allowing the yearbook to become a mass-produced product (8). In 1939, Taylor Publishing created the modern yearbook publishing industry by combining the print and production steps, which had previously been provided by separate companies, and by using offset lithography to introduce black-and-white photographs (17). From 1951 to 1979 the yearbook evolved from a keepsake and historical record to an educational tool, a public relations vehicle, and a forum for student expression, while for the staff, it became a place to acquire job-related skills (16). The seventies marked the experimental years: schools moved away from the standard design template provided by yearbook publishing companies and started personalizing their school’s books. Four-colour photography was introduced and candid

student quotations and informal text were used to create books that appealed more to the student body than to the administrators. Computer technology was introduced to yearbook publishing in the early eighties. This gave full creative control of design and typesetting over to the school staff for the first time, relegating major yearbook publishers to the roles of hawker and printer (19).

Facebook, which launched in 2004, has become the Internet's second most popular website, after Google (Giles 2010b, 5). In more impressive terms, if Facebook were a nation, its 350 million users would make it the third most populated in the world, after China and India (Giles 2010a, 3). When Facebook launched, it was marketed exclusively towards college and university students. Now, however, the average age of a Facebook user is between 35 and 54, and the age group that has seen the largest growth in the past year is 55 and older (Schroeder 2009). Not surprisingly, Facebook was conceptualized by a college student, Mark Zuckerberg, after his girlfriend dumped him (Facebook 2010). Zuckerberg's original website, called Facemash, was the bruised-ego remedy trifecta—allowing him to procrastinate from school work, look at pictures of cute girls, and dabble in the illegal by hacking into Harvard University's computer network. The original Facebook site was restricted to Harvard students before it became available by invitation only to all Ivy League colleges and, eventually, to all universities and colleges across Canada and the United States. In 2005, Facebook launched a high school version, which Zuckerberg called "the next logical step" (Facebook 2010). The site became available to everyone ages 13 and older in September 2006 (Facebook 2010). Facebook gained its first 150 million users between 2004 and 2008, doubled in size by 2009, and has now become the largest online social network (Giles 2010a, 5).

Facebook is conceptually a type of yearbook. Zuckerberg used the original site to compile photos from the online face books of various Houses on the Harvard campus. ("Face books" were the unofficial name for manuals published and distributed by Zuckerberg's prep school that contained photos of all students and faculty). As the site's popularity grew, it became less a student-focused phenomenon and more a tool for reconnecting with friends. Its ease of use encouraged older demographics to take advantage of the site, making those 55 and older the most

frequent users of Facebook. Consequently, the yearbook is following in the footsteps of the encyclopedia and the phone book: it has become unnecessary to a generation accustomed to instant access to what they seek—whether that be a definition, a phone number, or a photo. Costly to produce, and costly to purchase, the yearbook is no competition for its virtual counterpart that is not only free but also unrivalled in its accessibility and flexibility. In effect, as Dan Piepenbring stated on the popular blog, *if:book*, Facebook “is a better yearbook than a yearbook can ever be” (Piepenbring 2010).

The greatest challenge for the yearbook is that its value appreciates with time. “The problem that yearbooks are facing is that we’re in the business of selling history to people who are still living it,” says Lori Brooks, chairman of the yearbook committee for College Media Advisors, a national organization for collegiate media professionals (Smith 2008). A generation accustomed to instant gratification has little interest in a product that is slow to produce and limited in scope. Yearbook staff are creating an artifact in a culture that expects immediacy. A yearbook’s eventual value to its owner is impossible to quantify. The question is, will Facebook be appreciated by its users the same way?

The argument that digitized content will not endure as long as its print equivalent is based on discomfort with, or lack of faith in, the electronic world—books can be damaged and lost as easily as digital files. Society tends to privilege the tangible stage in the lifespan of a book, overlooking the fact that most content will originate as a digital file in a Word doc or similar, and (if Google has its way) will last eternally in the Cloud. The problem is that avid Facebook users and those old enough to appreciate their yearbooks are not the same people, and (to make a sweeping generalization for the sake of argument) neither generation understands the other’s choice of medium.

How can schools balance the latent worth of a potentially redundant product that is available for a limited time with its relatively novel digital counterpart? Schools have attempted the online yearbook, essentially a noninteractive version of Facebook, and the video yearbook, but did both unsuccessfully—in the digital age, the thought that a video yearbook would replace the print version is laughable. The solution may be to

combine social networking tools and digitized content to dynamically build a static artifact: a yearbook written, compiled, and created on Facebook and then traditionally printed. Social networking sites and the school yearbook can complement, rather than compete with, each other. This is exactly what a high school in Rocklin, California, has done. Recognizing Facebook's popularity with its student body, Whitney High School created a profile for the school's yearbook, *Details*, and used it to reach students campus wide (Miners 2009). Students were invited to submit photos and story ideas online to create a collaborative, traditionally printed yearbook. Zach Miners, of *U.S. News*, said of Rocklin High's efforts, "The real-time aspect of social networking has challenged yearbook editors to produce better, more inclusive records of what goes on in and around schools ... Facebook enabled yearbook staffers to identify trends and activities they wouldn't have otherwise known about" (Miners 2009). Collaborating with the student body not only added depth to the yearbook's coverage but also helped to market the book: the school reported an increase in its yearbook sales. Reaching out to the students on Facebook also addressed a major flaw that has hindered yearbook staff because they aren't exactly the kids with their fingers on the pulse.

Digital content will not be the end of the published word—that argument has been debated, debunked, and defanged over and over. (By "defanged" I mean "rendered harmless"). However, the increasing popularity of publishing online content in a traditional format is important to broach. Regardless of advances in technology, it appears that "to be published" is still a prevailing ambition. The published word has a certain authority, bestowing a socially accepted validity on authors and exposing them to a different audience from the one in the digital world. There is importance in the tangible book—it has value even to those who work predominantly in the digital world, including authors, bloggers, journalists, and contributors. But there may be more relevance in existing in the world of social media: it allows a user to be all these things more quickly and with greater scope—to the benefit of advertisers and marketing firms. Facebook and the school yearbook are essentially the same thing, except you can control Facebook—your photos, your friends, your content. As Dan Piepenbring notes, "Facebook's true

victory over print is predicated on its ability to massage our narcissism” (2010). Why settle for a book with one or two photos of yourself when you can have a vast network of thousands? The permanency of the Cloud should assuage any fears that Facebook’s memories won’t be available to pass along to the next generation; instead, the greater concern should be that the rampant self-editing on Facebook is going to mislead future generations about their parents’ awkward teen years.

A high school yearbook is literally a snapshot of a moment in someone’s life. Facebook allows you to take that moment, expand and build on it, and the site then becomes an ever-changing reflection of your life. When (in retrospect) the only things that really matter in your yearbook are how many photos you’re in, who signed it, and what they said, a costly inert product just cannot compete with a free and dynamic one that gives users unlimited ways to connect with others and make them feel good about themselves. In an age when MySpace takes being in a high school band to a whole new level of stardom, and Facebook is, in the words of SFU’s John Maxwell, “one hell of a collaborative, crowd-sourced memory machine,” Facebook is the best yearbook you could ever create.

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# True Fans: Can Social Media Get You \$100,000 A Year?

CHRIS LEBLANC

In Elizabeth Kemp's view, social media trumps traditional publishing; Chris LeBlanc sees the two formats as complementary. The challenges encountered in the business of publishing are particular to the field: "Unlike music that enjoys repeat[ed] listening, most books are read once, so you can't count on constant exposure to the reader beyond the frontlist ... What you can count on is that a creative person with talent is still creative and still has that talent, so sell that," says Joy Gugeler. LeBlanc shows how authors can use this talent and creativity when general-purpose social media strategies are applied to publishing.

*Chris LeBlanc is the only East Coast boy—the only boy at all—in this year's MPub. A blogger and avid user of both Facebook and Twitter, Chris sure does know his social media; hire him for marketing and he just might get you 1,000 True Fans.*

KEYWORDS: TRUE FANS, SOCIAL MEDIA, ONLINE NETWORKING, LESSER FANS

ACCORDING TO WRITER Kevin Kelly:

The point of this strategy is to say that you don't need a hit to survive. You don't need to aim for the short head of best-sellerdom to escape the long tail. There is a place in the middle, that is not very far away from the tail, where you can at least make a living. That mid-way haven is called 1,000 True Fans. It is an alternate destination for an artist to aim for (2008).

The True Fans concept is a relatively simple, yet exceptionally brilliant, strategy for providing many artists with a modest living. Kelly suggests that the money 1,000 true fans—fans who will “purchase anything and everything you produce ... [and who] can't wait till you issue your next work”—will spend on an artist's works can sustain that artist financially (2008). Assuming that these True Fans will spend at least \$100 a year on an artist, by having 1,000 True Fans, artists can expect \$100,000 in revenue from their work, even without producing a bestseller. Yet in order to maintain 1,000 True Fans, artists must remain in constant contact with their fans, which is where social media and online networking then come into play.

However, one must ask whether the 1,000 True Fans model can be successfully applied to publishing, as authors may not have \$100 worth of products or merchandise to sell to fans each year. Nevertheless, as the world moves further into the digital age, the core concept of the 1,000 True Fans model is a way for authors to use digital tools to their advantage. Social networking allows authors to reach out to readers more than ever before and connect with those individuals who are interested in the subjects about which the author is writing, which can then potentially lead to the creation of a True Fan.

The utilization of social media in marketing practices is still somewhat controversial; that is, its effects remain unproven and therefore some individuals are still quite hesitant to use social media as a legitimate business practice. However, it is safe to say that most—if not all—marketing departments in publishing houses have taken steps towards using social media to promote authors and their titles in one

way or another. Publishers offer podcast interviews with authors, advanced excerpts, and additional content for interested readers. Author blogs and Really Simple Syndication (RSS) feeds keep interested readers connected to authors outside of reading their primary works, while social networking sites such as Facebook and Twitter create buzz, discussion, and a sense of community surrounding an author's existing works and upcoming projects. Marketing through social media provides publishers with the ability to build and influence a community of followers interested in a particular author.

Although the potential benefits of social media are clearly apparent, Kelly suggests taking social media one step further by converting "Lesser Fans" into True Fans. Kelly describes Lesser Fans as people who "will not purchase everything you do, (who) may not seek out direct contact, but they will buy much of what you produce" (2008). Kelly suggests that an artist's True Fans are also surrounded by Lesser Fans, both in online communities and in their daily lives. The more artists connect with, and feed their True Fans through social media, the more artists will also nurture relationships with those Lesser Fans. Through the use of social media, True Fans can also communicate to Lesser Fans about how great the artist is and they may even convert those Lesser Fans into True Fans. As more True Fans are acquired, Kelly says additional Lesser Fans will in turn be gained. As Kelly suggests, "if you keep going, you may indeed end up with millions of fans and reach a hit" (2008).

But how exactly can publishing houses utilize this concept of True Fans, and is it really worthwhile to them? While the development, implementation, and maintenance of social media tools is costly in terms of time and energy, the dollar expense is relatively minimal and thus is ultimately attractive for marketing departments in publishing houses. Even with only 1,000 True Fans, artists already have a substantial following and, perhaps more importantly, quite a number of people who are willing to spend money on their material. The difficulty lies in finding an author who is not only marketable, but also willing to put in the time and effort required to maintain constant contact and interaction with their fans. In order to build that list of True Fans, an author will have to spend a substantial amount of time online, engaging with readers through blog posts, tweets, Facebook groups, and other social media.

However, having fans who not only spread word of mouth about an author's work but who also are willing to purchase any work they produce is extremely worthwhile for both the author and the publishing house; even if an author does not have 1,000 True Fans, reaching out to Lesser Fans online will generate substantial buzz around their works and potentially develop those Lesser Fans into True Fans.

Further, while the core concept behind the 1,000 True Fans method—to establish a consistent online connection between authors and readers—may be beneficial for publishers, the concept nonetheless runs into substantial obstacles in the publishing industry. Kelly states that all it takes is for 1,000 True Fans to “each spend one day’s wages per year in support of what you do,” with one day’s wages equalling \$100, for the author’s total revenue to reach \$100,000 (2008). Yet authors and publishing houses are limited to what they can produce in a year that can be put up for sale. Where musicians have concerts, DVDs, CDs, downloadable songs, posters, and many other products, authors and publishing houses are relatively limited in what they can produce for True Fans to purchase. Simply put, authors and publishers do not offer enough products on which True Fans can spend \$100 dollars a year.

Nevertheless, there may be some potential to utilizing a lesser form of the True Fans concept in publishing. Author Lawrence Watt-Evans successfully used this model of True Fans to publish a novel in 2004 when no major mainstream publisher was interested in continuing his *Legends of Ethshar* series. According to Watt-Evans:

I had several readers saying they desperately want to see more. I decided to see whether enough of them were willing to put their money where their mouths are to finance more Ethshar stories ... To my surprise, there were enough. My fans came through, and I wrote the ninth Ethshar novel (2009).

Watt-Evans accomplished the publication of a new novel by asking his fans to collectively contribute \$100 per month; when he received that amount he then posted the next chapter. The entirety of the book was initially published online only for his True Fans, and then later was printed in the February 2006 issue of the e-zine *Son and Foe*, and in

various formats by Wildside Press. However, Kelly notes that Watt-Evans gets by on an “estimated 200 True Fans because he also publishes in the traditional manner—with advances from a publisher supported by thousands of Lesser Fans” (2008).

How, then, can publishing houses use a similar technique with their own authors? The Watt-Evans method of releasing portions of the book to his True Fans may be potentially adapted towards a more widespread utilization by publishers; fans could pay a small fee to receive chapters of a novel in advance of the actual release of the print version. Of course this method encounters many problems, such as piracy, and some may argue that no one will want to pay for excerpts of an unfinished work. However, the True Fans concept suggests that people will pay for something of this nature, as the prospect of receiving content in advance of its official release provides what they believe to be added-value and thus becomes very enticing for both True Fans and Lesser Fans alike.

In the end, the concept of 1,000 True Fans is not entirely applicable to authors or publishing houses, but that does not mean it is completely invalid. While those True Fans may be willing to spend at least \$100 a year on an author’s work, the primary hindrance to implementing this concept in the publishing industry is that there simply are not enough streams through which to generate revenue. The concept may work on a smaller scale, and perhaps without a specific dollar amount in mind. In the confines of the publishing industry, the important aspect of the True Fan model is not generating \$100,000 a year, but developing and maintaining that list of True Fans. True Fans in the publishing industry are the ones who will spread word of mouth and who will create buzz about the publisher, the author, and the title; considering social networking’s nearly limitless potential for outreach, those True Fans are invaluable marketing tools.

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# Annie Goes Public: Finding a Suitable Solution for Orphaned Works

TRACY HURREN

Never before in the history of copyright has an entity been allowed to stand outside the law, and yet Google has been allowed to flout the restrictions of fair use. The Google Book Settlement is an opportunity to “address the inefficiencies in the copyright regulations head-on,” writes Tracy Hurren in this paper about orphan works. “What would it take for governments and corporations to think big about this and make it a global initiative to make all orphaned and public domain works universally available?” asks Sean Cranbury. Hurren closes out *The Book of MPub* by raising important questions of stewardship, accessibility, and ethics.

*Tracy Hurren has opted-out of both the Google settlement and a social life by completing coursework in the MPub, launching a publishing house, and designing its first book all in eight months. To purchase copies of Dragon Problems for your mother, brother, gerbil, and aloe plant visit [hurpublishing.com](http://hurpublishing.com).*

KEYWORDS: GOOGLE BOOK SETTLEMENT, ORPHAN, DIGITIZATION, COPYRIGHT, COPYRIGHT REFORM



WHEN THE FIRST copyright act—the Statute of Anne—was passed in 1710, no one could have predicted how the evolution of intellectual property rights and technology would complicate the dissemination of knowledge (Copyright Act, 1709, 8 Anne c. 19). The Google Book Settlement threatens to make this dissemination even more difficult. A central, and particularly unsettling, aspect of the Google Book Settlement is Google’s treatment of orphaned works, or titles that are still under copyright, but whose owners are unknown or unidentified, or have yet to come forward to claim the work. In a 2009 *New York Times* article, journalist Lewis Hyde references a fitting metaphor from Daniel Defoe: “both books and brats grow up; their relationship to those who bore them changes over time. Like a farmer’s children, books must help their author make hay until they come of age, whereupon they are free to leave home and participate in the larger community” (Hyde 2009). This may be true in the traditional author-publisher relationship, but in the eighteenth century Defoe could never have foreseen the copyright predicament that we face today; thus his metaphor overlooks a very important aspect of the stewardship of knowledge and content in the publishing industry: “What shall we do with the orphans?” (Hyde 2009).

Economic discourse defines public goods as those that are nonrivalrous and nonexclusive; that is, the value of the good does not decrease after use, and use by one party does not exclude use by another (Love 2008). By definition it would seem that knowledge and ideas should fit into this category. Current intellectual property regulations, however, ensure that knowledge is protected as a private good and, if passed, the Google Book Settlement will ensure that orphaned works will continue to be treated as private goods, thus making them accessible to the public only through purchase from Google. James Love of Knowledge Ecology International raises some interesting points in his proposal to the World Trade Organization (WTO) regarding the necessity of addressing the global availability of knowledge (2009). While I disagree with Love’s suggestion to use the WTO as an instrument to create policy change that would encourage the shift of knowledge into the public sphere, I do support the notion that current copyright policy needs to be re-evaluated in order to make the accessibility of knowledge a global right. The Google Book Settlement goes against Love’s ideals

and those of other forward-thinking, global, public knowledge initiators by granting Google, and Google alone, permission to digitize and make use of orphan texts that copyright renders inaccessible to everyone else. By creating an environment in which a not-for-profit organization would have the required legal protection to assemble an openly accessible collection of orphaned works, America could set a global precedent that would encourage other countries to engage in similar projects themselves, or even to collaborate on America's pre-existing ones. The result could be a truly global, *public* library.

The collective benefit of increased access to a variety of texts is a primary factor behind the Authors Guild's support of the Google Book Settlement. The Authors Guild argues that the Google Book Settlement would make millions of out-of-print books available once again with free public access at 16,500 public libraries and 4,000 post-secondary educational institutions (2009a). Access to individual titles would also be available for purchase from one's home computer. Additionally, 20% of all content would be made available free of charge to any computer connected to the Web (although initially only in America) through Google's preview function. This amounts to 600 million pages of free text—200 times that available through Wikipedia (2009b).

The benefits noted by the Authors Guild are not unique to the Google Book project, however. The public benefits of a digitized twentieth-century literary history can also be achieved through less commercial means. With such a valuable asset at risk it is important to make sure that the job gets done properly, and a corporation with commercial goals that are opposite to those of the cultural industry is not the right candidate to do so. The goal of the creation of a global library should be to make knowledge accessible to all, and to ensure that such knowledge is protected as a public—not private—good. Just because the owners of these orphaned works are not actively seeking economic gain from their intellectual property does not mean that Google, or any other commercially driven enterprise, has the right to step in and monetize the text. That said, to let this massive collection of cultural heritage languish in obscurity is to mount an assault on our literary heritage. To let the orphans slip into obsolescence effectively flies in the face of recent efforts to increase the supply of global, public knowledge.

Fortunately, Google is not the only party interested in digitizing orphans. Beginning in 2002, the Internet Archive began work on the Million Books Project—a program with the goal of scanning and digitizing books within the public domain to make them widely available in a digital library (Rights, 2001). The Internet Archive is a not-for-profit organization with a simple goal: “to encourage widespread use of texts in new contexts by people who might not have used them before,” and their method to accomplish this is by providing “near-unrestricted access” to the works (Rights, 2001). The Internet Archive’s efforts, unfortunately, have been delayed by the abundance of orphans that it has encountered; in 2004 Internet Archive filed a suit that challenged current American copyright legislation in an effort to free the orphans from copyright restrictions. Sadly, before orphaned works legislation could be passed, Google entered the ring and the Internet Archive’s proposed copyright legislation took the back seat to the current legal battle surrounding Google Books (Kahle 2009b).

Google’s solution to the copyright dilemma is unprecedented, to say the least. The ability to publish someone’s copyrighted material has always been based on the rights holder’s choice to opt in—if one party wants to use another party’s property outside the guidelines of fair use, then they need to request the use of the copyrighted property from the owner. The Google Book Settlement does not work this way. The settlement instead works on an opt-out basis, which is the reason the threat of Google taking control of orphans is so high—the orphans have no human voice to opt out for them, making Google the evil stepmother planning to put the orphans to work. Hyde’s article lists the number of orphans at four or five million, but each article I’ve read seems to cite a different number (Hyde 2009). Regardless of exact figures, orphans comprise a vast body of work, and to simply hand over control of orphans to Google would be like “letting an executor drain an estate whose rightful heirs cannot be found” (Hyde 2009). As author Nick Harkaway notes, this upside-down interpretation of copyright sets a dangerous precedent, “which favours large companies who can search over small companies and individuals who cannot be constantly vigilant and may not have legal resources to challenge those who appropriate material” (Harkaway 2010).

Instead of setting a precedent in court that grants Google special amnesty from copyright law, a better, more globally equitable solution would be to address inefficiencies in the copyright regulations head-on. Groups such as Public Knowledge and the U.S. Copyright Office have made proposals to address the copyright issues that directly hinder access to orphaned works. Public Knowledge advocates for the free use of orphaned works as long as a diligent search has first been conducted for the owner of the work and attribution is provided. It also suggests that there should be a cap on liability should the owner come forward at a later date. The goal is to ensure that fear of future financial damage does not prevent any parties from using orphaned material. On January 31, 2006, the U.S. Copyright Office submitted a report to Congress with similar recommendations. The primary difference between the two proposals was that, in the Copyright Office's version, noncommercial users, like libraries and museums, would not have to provide compensation should rights owners eventually emerge. If these (or similar copyright reforms) were implemented, a hospitable environment in which public libraries could openly share knowledge would ensue, and already underfunded libraries would not be at the mercy of purchasing access to orphans via institutional subscriptions to Google.

By creating copyright policy that encourages use by noncommercial organizations, the public—instead of corporations—would be able to reap the benefits of orphaned titles. If these works are available from not-for-profit—possibly government supported and protected—organizations, corporations such as Google would not be able to charge for the products that readers could access elsewhere for free, thus diminishing the threat of Google obtaining a monopoly over orphaned titles.

Like most custody battles, the Google Book Settlement has been long and tedious, with a lot of bad blood and sibling rivalries along the way. But with such high stakes, much more is on the line than the individual desires of both authors and publishers. While some public benefits could arise from the Google Book Settlement, these benefits should not be unique to Google Books and could be achieved through a noncommercial entity. Fortunately the settlement has been ongoing since

September 2006, and with version 2.0 of the settlement being rejected this past February (2010), it doesn't seem likely that Google will seize complete control of our cultural assets in the immediate future. This means we still have time to review the inflexible intellectual property regulations that created this problem in the first place. As Brewster Kahle urges in the *Washington Post*: "We are very close to having universal access to all knowledge. Let's not stumble now" (Kahle 2009a).

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# Glossary

**Akismet:** a spam filtering service.

**Agile:** A term for organizations or business models that follow the Agile Manifesto, which was initially created to guide software development practices. An agile business privileges people over products and innovation over expansion; these organizations tend to be high risk and cutting edge.

**Blog:** a type of website dedicated to providing regular entries about one's interests.

**Category:** a way to sort content. Each post in WordPress is filed under a category. Thoughtful categorization allows posts to be grouped with others of similar content and aids in the navigation of a site.

**Collaborative Editing:** the practice of groups producing works together through individual contributions.

**Commentpress:** an open source theme and plugin for the WordPress blogging engine that allows readers to comment paragraph by paragraph in the margins of a text.

**ebook:** an electronic form of text that is equivalent to a conventional printed book (pbook), often read on a computer or other electronic device designed to read ebooks.

**EPUB:** short for “electronic publishing format,” which allows content (text) to be reflowed, depending on the particular display device used.

**Espresso Book Machine (EBM):** a print-on-demand (POD) machine that prints, collates, covers, and binds a single book in a few minutes. It is small enough to fit in libraries and retail stores (via Wikipedia).

**Format Conversion:** moving content from one platform to another (from blog to ebook to pbook).

**Institutional Repository (IR):** an online site for collecting, preserving, and disseminating—in digital form—the intellectual output of a research institution. This would include materials such as research journal articles, before (preprints) and after (postprints) undergoing peer review; digital versions of theses and dissertations; and other digital assets generated by normal academic life such as administrative documents, course notes, or learning objects (via Wikipedia).

**Javascript:** Netscape's simple, cross-platform, World Wide Web scripting

language. JavaScript runs in three environments: as a server-side scripting language, as an embedded language in server-parsed HTML, and as an embedded language run in web browsers where it is the most important part of DHTML.

**Open Access:** access to material and information via the Internet in such a way that the material is free for all users to read and use. Related to the open source movement in software (via Wikipedia and *The Impact of Electronic Publishing*).

**Open-Source Software:** computer software protected under a software licence that allows users to modify and distribute the code freely.

**Page:** often used to present “static” information about yourself or your site. Pages live outside of the normal blog chronology, and are often used to present information about yourself or your site that is somehow timeless—information that is always applicable. You can use Pages to organize and manage any amount of content. Pages are for content such as “About Me,” “Contact Me,” and so on. Pages are displayed independently, do not appear in RSS feeds, and can have subpages for navigation. Other examples of common pages include Copyright, Legal Information, Reprint Permissions, Company Information, and Accessibility Statement.

**Peer Review:** the evaluation of a person’s work or performance by a group of people in the same occupation, profession, or industry.

**PHP:** a recursive acronym for PHP: Hypertext Preprocessor. It is a popular server-side scripting language designed specifically for integration with HTML, and is used (often in conjunction with MySQL) in Content Management Systems and other web applications. It is available on many platforms, including Windows, Unix/Linux, and Mac OS X, and is open source software. WordPress is written using PHP and requires it for operation (via WordPress).

**Plugin:** a group of PHP functions that can extend the functionality present in a standard WordPress weblog. These functions may all be defined in one PHP file, or they may be spread among more than one file. Usually, a plugin is a PHP file that can be uploaded to the “wp-content/plugins” directory on your webserver, where you have installed WordPress. Once you have uploaded the plugin file, you should be able to “turn it on” or Enable it from the “Plugins” page in the administration

interface of your weblog. The WordPress source code contains hooks that can be used by plugins (via WordPress).

**Pocket Market:** the group of people who are connected to an author—friends, family, colleagues, local retailers—and who are therefore most likely to order their work directly from them or through a POD service (via SFWA.org website).

**Posts:** the entries that display in reverse chronological order on your home page. In contrast to pages, posts usually have comment fields beneath them and are included in your site's RSS feed (via WordPress).

**Print on Demand (POD):** a printing technology and business process in which new copies of a book (or other document) are not printed until an order has been received. Innovations in digital technology printing have made print on demand a viable alternative to the traditional offset printing model, which demanded large print runs (and warehouse space to store those books) in order to be sustainable and profitable (via Wikipedia).

**Tags:** a way to situate content. Each post is tagged according to its content and users can then select the desired tag to find all related posts. These tags are global, allowing *The Book of MPub* to be associated with comparable content from other sources.

**Themes:** WordPress themes are files and styles that work together to create a presentation or look for a WordPress site. Each Theme may be different, offering many choices for users to take advantage of in order to instantly change their website look (via WordPress).

**Typesetting:** composition of text material by means of types.

**Widgets:** WordPress Widgets (WPW) are like a plugin, but designed to provide a simple way to arrange the various elements of your sidebar content (known as “widgets”) without having to change any code (via WordPress).

**XML:** “XML, or eXtensible Markup Language, is a specification for storing information. It is also a specification for describing the structure of that information. And while XML is a markup language (just like HTML), XML has no tags of its own. It allows the person writing the XML to create whatever tags they need. The only condition is that these newly created tags adhere to the rules of the XML specification” (Goldberg).



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# Colophon

The *Book of MPub* was designed by the pressplay team with invaluable guidance from Roberto Dosil.

The primary typeface used is Sabon, a serif designed by Jan Tschichold and released jointly in 1967 by Monotype, Linotype, and Stempel. Tschichold drew from type designed by Claude Garamond and Robert Granjon in the sixteenth century.

Scala Sans, a humanist font used to complement Sabon, was designed by Martin Majoor for the Vredenburg Music Centre in Utrecht. It was issued by FontShop International in 2004.

The book was composed and edited in WordPress and laid out in InDesign. HTML from the WordPress blog was converted for InDesign using the Thinkubator “ickmull” XSLT Conversion Script created by Keith Fahlgren, Meghan MacDonald and John Maxwell; the EPUB file was compiled in eCub. The stylesheets and templates were adapted from those written for *Book Publishing I* (CCSP Press, 2006). *The Book of MPub* is available in print format through BookRiff and on the Espresso Book Machine at Oscar’s Art Books in Vancouver, as a free ebook in EPUB and PDF formats, and in blog format at [www.ccsp.sfu.ca/bookofmpub](http://www.ccsp.sfu.ca/bookofmpub).

pressplay edited *The Book of MPub* according to the *Canadian Oxford Dictionary* (2004 edition) and the *Chicago Manual of Style* (15th edition).

Although *The Book of MPub* was a collaborative endeavour in every sense, the pressplay team members made specialized contributions worth highlighting:

Vanessa Chan, design and production guru and pastry chef

Cari Ferguson, eagle-eyed citation specialist, John whisperer, and caffeine addict

Kathleen Fraser, expert cat herder and editorial/twittitorial voice

Cynara Geissler, production/sartorial consultant and omniscient narrator

Ann-Marie Metten, mentor, soothsayer, editor, indexer, and CanLit advocate

Suzette Smith, proofreader, SEO ninja, and mediator

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