A book publisher's manifesto for the 21st century
by Sara Lloyd

How traditional publishers can position themselves in the changing media flows of a networked era.

Print sales are falling. According to the National Endowment for the Arts' 2007 report *To Read or Not to Read (1)* both reading standards and voluntary reading rates of traditional print material amongst young people are falling. Textbook publishers are fighting for sales; campaigning to alert students to the necessity of using their products. Hardback fiction has almost gone the way of the dinosaur. The open access debate rages on. Publishers and retailers have consolidated. More and more books are produced, but there is less and less choice on the high street. Leisure time is transferring away from books and reading, away from television even, to the Web; to social networking sites, blogs, instant messaging, video and music file sharing sites. The attention economy is shrinking, fast. Academic research is – for many students – all about search. Let's face it, for most students, actually, it's all about Google. Who needs books anymore? More to the point, who needs publishers?

In an 'always on' world in which everything is increasingly digital, where content is increasingly fragmented and 'bite-sized', where 'prosumers' merge the traditionally disparate roles of producer and consumer, where search replaces the library and where multimedia mash-ups – not text - holds the attraction for the digital natives who are growing up fast into the mass market of tomorrow, what role do publishers still have to play and how will they have to evolve to hold on to a continuing role in the writing and reading culture of the future? Will there even be a writing and reading culture as we know it, tomorrow? Is the publishing industry acting fast enough and working creatively enough to adapt to the new information and leisure economies?

Publishing is an old and established industry with its foundations firmly rooted in print culture. The publishing model has evolved over history in a very slow, organic fashion. The sedate pace of change has suited publishers. Stated simply, the journey of a text from author to reader has been a linear one, with publishers traditionally fulfilling the intermediary roles of arbiter, filter, custodian, marketer and distributor. There has been some blurring at the edges, some tinkering with the process, but little radical change. In the literary world, agents have, at least partially, usurped the arbiter and filter roles. Retailers have become, to some extent, marketers and, occasionally, have even become publishers themselves. However, by and large, the stages in the process have been clearly delineated and the role of the publisher clearly defined. From a print perspective at least, publishers have offered one key, relatively unique set of abilities: to produce, store and distribute the product to the market. The rise and rise of the Internet has begun to disrupt this linear structure and to introduce the circularity of a network. More challengingly, perhaps, it has raised the distinct possibility of publisher disintermediation by more or less removing as an obstacle the one critical offering previously unique to publishers - distribution.

Publishers – and, importantly, authors - will need increasingly to accept huge cultural and social and economic and educational changes and to respond to these in a positive and creative way. We will need to think much less about products and much more about content; we will need to think of 'the book' as a core or base structure but perhaps one with more porous edges than it has had before. We will need to work out how to position the book at the centre of a network rather than how to distribute it to the end of a chain. We will need to recognise that readers are also writers and opinion formers and that those operate online within and across networks. We will need to understand that parts of books reference parts of other books and that now the network of meaning can be woven together digitally in a very real way, between content published and hosted by entirely separate entities. Perhaps most radically, we will have to consider whether a primary focus on text is enough in a world of

multimedia mash-ups. In other words, publishers will need to think entirely differently about the very nature of the book and, in parallel, about how to market and sell those 'books' in the context of a wired world. Crucially, we will need to work out how we can add value as publishers within a circular, networked environment.

One of the key perception shifts that publishers need to make, then, is about the book as 'product'. Whilst the book continues to be viewed as a definable object within covers, as a singular 'unit', publishers will continue to limit their role in its production and distribution, and this is a sure fire way for publishers to write themselves out of the future of content creation and dissemination. There are two areas of activity in the linear progression of a text between author and reader which have previously remained hidden to the reader: the development of the text itself; the writing and editing process, and the sales, marketing and distribution of the text. Readers have traditionally had no role in the former and only a limited role in the latter, through word of mouth recommendations or viral marketing. It is likely that today's digital natives, who have become 'prosumers' (producer / consumers) with alarming speed and perhaps even more alarmingly different levels of proficiency, will expect a great deal more involvement in both of these areas of activity if they are to be engaged by texts. Witness two main stream examples, the Star Wars films and the Harry Potter books and films, both of which have developed massive prosumer (or 'superfan') followings, and both of which have seen conflict between the film companies and the fans that are creating content.

A minority of publishers have begun to experiment with the blurring of these traditionally distinct boundaries already. Chris Anderson's *The Long Tail* (2) was of course written 'in public' via a blog, allowing readers to post comments and to be involved in the very act of writing the book. O'Reilly's Rough Cuts (3) make a virtue of the concept of developing a book online first and have established a business model for combining pre-publication and post-publication access. McKenzie Wark's *Gamer Theory* was also blogged before it was produced as a book, allowing readers to post comments and to make suggestions about the shape of the book. GAM3R 7H30RY 1.1 was "a first stab at a new sort of "networked book," a book that actually contains the conversation it engenders, and which, in turn, engenders it." At http://www.futureofthebook.org/mckenziewark/ readers can read the original version (v1.1), view the fully annotated version with all the reader comments alongside the core text, read v2.0, join a related discussion forum or view visualisations of theories within the text.

The locked-in perception of the book as a unit or a product has also led to digital 'strategies' which largely consist of the digitisation of existing print texts in order to create eBooks. This in turn has led to an obsessive focus on the reading device and a perception that the emergence of a 'killer device' will be a key driver in unlocking a digital future for books in the way that the iPod was, say, for music. This is a flawed perspective in a number of ways, not least because it fails to recognise the enormous amount of online or digital 'reading' that already takes place on non-book-specific devices such as desktop PCs, laptops, PDAs and mobiles, but also because it fails to recognise that the very nature of books and reading is changing and will continue to change substantially. What is absolutely clear is that publishers need to become enablers for reading and its associated processes (discussion; research; note-taking; writing; reference following) to take place across a multitude of platforms and throughout all the varying modes of a readers' activities and lifestyle.

As digital reading devices go, Amazon's Kindle is probably the first to at least recognise the importance of the 'connectivity' between our differing modes of reading, the fact that readers might like to follow up references within the text or to conduct a related search. The addition of wireless connectivity to the device and the capacity (although frustratingly limited) to connect to blogs, online newspapers and other web-based content goes some way towards recognising this as well as to acknowledging the fragmented, 'always on' nature of most people's reading habits today, allowing readers to move seamlessly from reading a few pages of a novel, say, to snacking on some news, before picking up a couple of blog feeds. This is

absolutely not to say that the Kindle has tied up the future of digital reading and defined what the experience should be; far from it. It signals a step change in that it connects downloadable digital units of reading matter ('eBooks') with the more exploratory-style online reading and researching, and it is the first device to be intrinsically connected to a commercially viable eBook platform. However, the Kindle is merely one device with one very specific agenda and, as such, it only provides one small, rather flawed element of the picture that is emerging of a future for digital reading.

Reading is not an activity that can be defined simply and it is all too often described as a solitary, immersive experience, as in the experience of reading a novel for hours at a time. This is only one type of reading, and it is important to recognise that narrative fiction makes up less than 25% of the entire book market. In any case, even if a reader spends some solitary time reading, readers have always traditionally liked to swap views and ideas about the content of books, to turn over the corners of pages in which favourite passages appear to which they want to refer again, and to write notes in the margins. Reading is a much less passive activity than it at first appears, and it is connected with many and diverse related activities. The Internet has not created a more active or proactive approach to reading but it has enhanced it, enabled it to happen across more disparate networks and allowed it to be recorded, aggregated and interlinked in exciting new ways. The way in which books might begin to 'live' on the Internet will perhaps be the most palpable incarnation of Roland Barthes' theories in *The Death of the Author*, in which the author is no longer the focus of creative influence but merely a scriptor, and every work is "eternally written here and now," with each re-reading, because the "origin" of meaning lies exclusively in "language itself" and its impressions on the reader (4).

Publishers need to provide the tools of interaction and communication around book content and to be active within the digital spaces in which readers can discuss and interact with their content. It will no doubt become standard for digital texts to provide messaging and commenting functions alongside the core text, to enable readers to connect with other readers of the same text and to open up a dialogue with them. Readers are already connecting with each other – through blogs, discussion forums, social book-marking sites, book cataloguing sites and wikis. Publishers need to be at the centre of these digital conversations, driving their development and providing the tools for readers to engage with the text and with each other if they are to remain relevant. Bob Stein at the Institute for the Future of the Book (http://www.futureofthebook.org) talks about "the networked book." … the book as a place, as social software - but basically .. the book at its most essential, a structured, sustained intellectual experience, a mover of ideas - reinvented in a peer-to-peer ecology." (5)

I like Chris Meade's story illustrating how publishers should not hold on too tight to the shores as we set sail into future waters:

"We (a novelist friend and I) visit(ed) a fish shop by the river that was flooded out. They'd only just opened an extension built at a height recommended by a local fisherman who had told them, "That's as high as the tide went nine years ago – you'll be all right." They weren't.

Bloggers mix text with still images with moving pictures embedded from YouTube etc. – young people take that media mix for granted, and as consumers we all do, watching tv adaptations of favourite books, using the web to research more about the author to discuss at our reading group. A new generation of more consciously transliterate reader will take it as read that the text is surrounded by researches, images, networks of reader response to the

point where these become an entirely integral part of the work of art, the author's creative voice distinct but no longer so alone.

The flooded fields are rather beautiful and it's already hard to recall what the landscape looked like before. Nature can adapt instantly to change; it takes longer to redraw the maps." (6)

Not all books need to be networked books. There will still be a place for that deeply immersive, solitary reading I hope in the future. But publishers had better be the ones defining what the shape of a 'networked book' should be nonetheless, because if they are not someone else sure as hell will be.

And whilst the edges of the book become more porous, the concept of a 'book as unit' slowly disappears further into history, new business models are already emerging. The value in the chain moves from a model which intertwines content with distribution to a model which simply values the content. Tim O'Reilly spotted this years ago and his company built Safari books online as a subscription service accessed with a browser, which now has revenues in excess of those widely cited for the entire downloadable eBook industry. As he points out in his recent blog post *Bad Math among eBook enthusiasts* on O'Reilly Radar *(5th December 2007) "…* as for the kind of books that you don't read from beginning to end, but just use to do a job like looking up information, or learning something new, the "all you can eat" subscription model may be more appropriate [than unitary pricing]. With Safari, we've increasingly moved from a "bookshelf" model (in which you put books on a bookshelf and can only swap at month end) to an all you can eat model, because we've discovered that people consume about the same amount of content regardless of how much you make available. All you can eat pricing lets people take what they need from more books, but it doesn't increase the total amount of content they consume. It merely changes the distribution, and in particular, favors the long tail over the head." (7)

As Scott Karp observes on O'Reilly's comments in his blog post on *The Future of Print Publishing and Paid Content (6th December 2007)* on Publishing 2.0, "Instant full access to a searchable digital library is a radically different form of distribution from buying reference books one at a time and putting them on your bookshelf. But here's the fascinating part — "it doesn't increase the total amount of content they consume." People still value and use the content in much the same way, despite the radically different distribution model. By unbundling these books into a digital library, consumers essentially repackage them by searching for and selecting specific content items.

So even when consumers value content enough to pay for it, they intuitively understand that it doesn't cost the publisher nearly as much to make the content available digitally as it did to put all of those books physically on a shelf. That's why consumers aren't willing to pay for the equivalent of buying ALL the books in print. You can't price a bus ticket the same as a plane ticket simply because they both get you from point A to point B — it costs a lot less to drive a bus than fly a plane." (8)

Online science fiction publisher Baen Books' webscriptions offering (http://www.webscription.net/) puts a value on material pre-publication and demonstrates a successful, early move from unitary distribution and pricing to a flexible, subscription offering. This web based re-creation of the serialized novel using Science Fiction published by Baen Books offers novels published in three segments, one month apart, beginning three months before the actual publication date. Each month four books are made available for $15 per month. About two weeks after the last quarter is delivered, print versions of the books become available in bookshops.

Publishers are also slowly waking up to the idea that, whilst the book online can no longer always afford to be an island, neither can the publisher. Consumers of books care very little, if at all, about publisher brands. Some authors are brands, but publishers have largely remained invisible to consumers in terms of branding. In the online space, publishers need to recognise that readers simply want the content they require – and fast, simply, without barriers or walls ring-fencing random selections of content purely because one content set belongs to one publisher and another set to a second, different publisher. A useful network of books will almost always, inevitably, cross the boundaries between a number of publishers. In the journals world this has been recognised and resolved by cross-publisher platforms and linking systems such as CrossRef (www.crossref.org) and IngentaConnect (www.ingentaconnect.com) . As books move online, similar developments will be necessary to connect the multiple references between books published by many different publishers, but book publishers have been far slower to develop cross-publisher platforms than journals publishers were, perhaps because the critical nature of citations in journals publishing offered a clearer strategic and commercial driver in the journals world. In the education market at least, the requirements for custom publishing in which institutions, their academics and students are able to construct bespoke textbooks and course materials drawn from content published by multiple publishers will also no doubt only increase, and publishers will need to get a whole lot better at finding ways to come down from their ivory towers and work together.

Customisation will not stop at bundling multiple texts together, though. Something that has shocked traditional media companies perhaps more than anything about the Web 2.0 world is the desire of consumers to produce and to share rich media content of their own rather than or in addition to being passive consumers of media streamed down to them by the corporations. The explosion in blogs, the popularity of digital photo sharing sites, the more or less overnight success of YouTube, the rise of 'citizen journalism', the development of 'machinima' (the creation of films or clips created by gamers manipulating the characters in video games) all bear witness to the strong desire of individuals to express themselves and their creativity and to share their productions with the world via the Web. As Jeff Gomez points out in his book, *Print is Dead*, the emerging generation of digital natives quickly graduated from 'Generation Download' to 'Generation Upload', a generation which is "beginning to define itself by mixing, mashing, and combining disparate elements of what they've pulled from the Internet and then changing it into something else." (9) Publishers will need to provide the wherewithal for these new 'prosumers' to customise published texts, to create their own complementary, ancillary content and to link it to the core text if they are to continue to provide an experience of reading which engages 'Generation Upload.' And as a new generation of readers interacts with texts online publishers will be wise to place themselves in a position to harness the network data and collective intelligence produced by social annotation and media creation, the sum of the "Wisdom of Crowds," and to apply this to its future content development and to its marketing.

But as texts become increasingly interlinked and prosumer-generated ancillary content and commentary grows, and as the distribution model moves from chain to network, the power of search – a.k.a. Google, at least in today's world - will only increase. The economics of distribution have been devalued by the digital content stream, but access – and search - have become all-important. Publishers in the trade space especially – and Amazon, too – might well be focusing far too much attention on the future of the download. Could it be that Amazon is betting on the wrong horse, assuming device (Kindle) plus distribution platform (Amazon eBook store) will be the killer combination? Many publishers are watching the mobile space with interest, and even more are observing Apple particularly closely to see how the iPhone and the iTouch perform, and whether either is widely adopted as a reading device. Both devices are already very text capable and Apple is likely to improve these capabilities.

As Adam Hodgkin points out in a November 2007 post on his Exact Editions blog, *"Amazon versus Google for eBooks?"*:

"Google with its Book Search program and its alliances with publishers and libraries is going to occupy the place that would otherwise appear to be Amazon's of becoming our preferred source of access to published literature. Amazon seems to have taken a wrong turn in supposing that **distribution**, rather than **access** and **search**, is the key challenge for digital print.

The TeleRead blog has been giving the most thorough all-round coverage of the Kindle and Sony eBook readers. David Rothman who blogs many of the TeleRead pieces admits to being close to being a Kindle supporter; he probably would be, if only it eschewed DRM and embraced the .epub Open eBook standard. But what would Google say to the .epub format? Google will ignore .epub, which is inimical to their advertising business model. The Google Book Search approach makes downloads irrelevant (the downloads GBS provides are very clunky, much less usable than the online GBS). In fact, for Google, downloads are just as outmoded and uneccessary as DRM.

Google and Apple, between them already have the solution for eBooks (and it's not a download solution). **Read** and **search** on your iPhone and **access** via a web browser, anything in print can be handled that way. More to the point: **everything in print can be handled that way**. Everything will be searched via the web, everything will be accessed via the web. Downloads are pretty much of an irrelevance. The question is: what do authors and publishers plan to do about that?

Answer: "Maybe the publishers should themselves try selling/granting access direct". Aside from Google with its Book Search, the publishers are the other variable in the market-place which has a promising opportunity if the Amazon Kindle download system bombs. .. After all, scientific and technical publishers have made a reasonable fist of creating a digital market for their STM periodicals. Book publishers need to create access opportunities and figure out how to sell digitally direct"(10).

The question really is no longer, "Will consumers read on screens in the future?" or "Will all content be found on the Internet?" The question is rather, "How will consumers read on screens in the future?" and "How will all content be found on the Internet?" And as publishers have been latecomers to the online party, the question lurking behind all of this is what, if any, role do publishers have in the digital future? It's a future which is not too distant and in which texts are potentially increasingly inter- related, multiple information sources and media types are mashed, and a combination of search and social networks provides the gateway and the guide to content online. Perhaps publishers might position themselves in new intermediary roles: helping authors to write through platforms, or bringing authors and readers together in new and creative ways. However, by and large, on a strictly technical level at least, publishers aren't needed at all for these functions. There is a tremendous amount of available application software online which can bring most of this about. Initiatives such as Amazon's CreateSpace bring authors and readers together and then apply the 'Wisdom of Crowds' to ensure that the best and most popular content rises to the top. Perhaps it could be argued that publishers will always be required in order to bear – or at least share – the financial risk of publishing a work, but again, with print distribution out of the equation, and with print on demand offering the ability to print a single copy for each single order, financial outlay in terms of production and product storage and delivery disappears. Publishers need to work quickly to define what the quintessence of publishing is, what the core value provided by the publisher is beyond the technicalities of matching content with readers. When pressed to think about this, much of what publishers have to offer beyond the technicalities is qualitative rather than quantitative:

stewardship, consultancy, an imprimatur. Will authors continue to value these things enough to believe that publishers are critical to the publication of their works?

An interesting question is that of scale. Should publishers be joining forces to create multi-publisher platforms, to dominate content networks by developing critical mass across content types and ensuring that content is interlinked in the most valuable and rich ways? If that is the case then publishers are probably mistaken in handing off this role to Google. In its current form, Google Book Search is already providing the access key to multi-publisher book content. It is, in effect, creating the online book platform. It does little to interlink the various texts but that would be a logical next step. Any publisher which continues to regard Google as a benign partner helping to bring their valuable content to light on the Internet has their head firmly buried in the sand, but in the Internet space, publishers attempting to stand up to Google is a little like a small shoal of fish attempting to push back a tidal wave. In fact, 'standing up to Google' may not be the answer at all, but finding a way to complement Google is difficult, when this Internet giant is so easily able to move and occupy new digital spaces. And Google's quiet announcement that it will invite Internet users to produce 'Knols' (units of knowledge; introductions to topics that will appear when a user searches on that subject) has been widely touted as a direct competitor to Wikipedia, but, more to the point, it firmly signals the search company's intent to move directly into the publishing space.

Perhaps the only way to answer this will be for publishers to focus back on developing specialist expertise around vertical niches, taking advantage of the 'deep niche' provided in the long tail world of the Internet, as described so well by Michael Jensen in his article on the subject in the Journal of Electronic Publishing (11) In this context publishers would focus value around subject or genre expertise and intimate, direct market knowledge, providing editorial and marketing functions beyond the merely 'technical'. In this scenario publishers would need to move back further into the territory of filter and editorial consultant and to re-focus energies on their (oft forsaken) role as career nurturers for authors (a space currently shared at least by agents in the trade space). They would also need to develop brands around subject or genre niches so that their platforms are able to gain traction over those developed by competitors and to become far, far better at direct sales and marketing. Publishers will need to press further into the retail space, developing direct relationships with consumers of their content, if they are to become an effective bridge between authors and readers. Whatever shape the future holds, it looks like publishers won't survive unless they regain some of the roles that over the years have been handed off to other partners in the distribution chain.

Publishers have always spoken proudly of their role as custodians of copyright, preservers of culture, but how much have they really done to ensure the existence of a digital archive? This – along with developing the interconnections within and across archives of content from multiple publishers - would be a clear role for publishers to take, but has Google already stolen a march there, too? The publishing world awaits the outcome of Google's legal battle with the Author's Guild, but in a way, the bluster about Google's generous interpretation of the fair use clause often only serves to cover up a sense of shame that it was not publishers who first chose to invest in the digitisation of our print archives and to develop the means to access them. Many historians and archivists and librarians are concerned about the possible impact on content quality of a mega-corporation focused in the main on expanding search, adding to its advertising revenue potential and providing 'good enough' information for the attention poor consumers of today. Robert B Townsend outlines some of the flaws in the content and the metadata provided via Google Book Search and asks:

"…what's the rush? In Google's case the answer seems clear enough. Like any large corporation with a lot of excess cash the company seems bent on scooping up as much market share as possible, driving competition off the board, and increasing the number of people seeing (and clicking on) its highly lucrative ads or "renting" copies of the books. But I am not

sure why the rest of us should share the company's sense of haste. Surely the libraries providing the content, and anyone else who cares about a rich digital environment, need to worry about the potential costs of creating a "universal library" that is filled with mistakes and an increasingly impenetrable smog of (mis)information.

As historians we should ponder the costs to history if the real libraries take error-filled digital versions of particular books and bury the originals in a dark archive or the dumpster. And we should weigh the cost to historical thinking if the only substantive information one can glean from Google is precisely the kind of narrow facts and dates that earn history classes such a poor reputation. It is time, it seems, to think in a careful and systematic way about how this will affect our discipline, and the new modes of training and apparatus that will make it possible to negotiate the volume and flaws of the emerging digital landscape." (12)

Whilst Google has led the drive to make book content 'discoverable' online, publishers have been slow to harness web techniques to promote and sell books, both in print and in digital formats. Many, many publishers are still nowhere near even managing the basics, of systematically creating and storing and 'seeding' sample chapters, excerpts, audio or video author interviews, schedules of author appearances, links to media coverage, featured material on social networking sites and rich bibliographic material. Whether publishers will find a way to cohabit with Google and the other search engines, to ensure that their content is discoverable through search *but on their terms*, to regain the lead as specialists in the marketing and selling of books, of content, remains to be seen. Publishers certainly could have a role to play in trying to work with Google and the other search engines to ensure the highest standards of quality are upheld, that the metadata is accurate, that the future users of the digital archive will find more than simply 'good enough' information and will be able to plough a rich seam of digital marketing materials in support of authors and their books.

Let's hope that is possible for a moment. Whichever way it goes, in order for publishers to break their traditional boundaries and to develop into the publishing companies of tomorrow will require a step change in their form, culture and approach. Digital publishing strategies will need to move from defensive or protective to creative and liberal, with an emphasis on enabling readers to share and to change what they read. A move away from text-centricity and towards multimedia will no doubt be key and this has repercussions for the kinds of rights that publishers will need to negotiate as well as for the skills they will require of their staff. Publishers will need to view themselves as shapers and enablers rather than producers and distributors, to take a project rather than a product approach and to embrace their position as merely a component element in a reader, writer, publisher circularity. They will need to embrace new business models and they may even need to become media companies rather than publishing companies. They will need to understand and know and connect with their readers far, far better and they will need to develop brands that hold the highest kudos for authors and imply brand values to consumers that appeal to readers around identifiable niches. Ultimately they may need to ready themselves sooner rather than later for a fight to the death not only with their current partners in the distribution chain but also with non-traditional competitors who are rapidly devouring the space which has traditionally been reserved for them.

(1) *NEA, To Read or Not to Read: A Question of National Consequence, Research report, November 2007* http://www.nea.gov/research/ToRead.pdf
(2) Chris Anderson, *The Long Tail*, *Why the Future of Business is Selling Less of More, 2006* http://www.longtail.com
(3) http://www.oreilly.com/roughcuts/
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(11)   Michael Jensen *The Deep Niche*, The Journal of Electronic Publishing, vol 10, no 2, Spring 2007.
(12)   Robert B Townsend, *Google Books: Is It Good for History?,* Perspectives, September 2007