Summary

The Book Industry Study Group proposes a plan to address U.S. adoption and use of the ONIX 3.0 standard for book metadata. The plan includes several steps to be taken in calendar 2018, including fact-finding, outreach, development of a refined business case, persistent communication, and BISG-sponsored education. This document provides the background, rationale, and details for the project.

Background

The Book Industry Study Group (BISG) has played a significant role in promoting best practices in the development and use of metadata in the book publishing industry in the United States. The U.S. market was one of the first to move to widespread use of ONIX, and an estimated 800 publishers representing the majority of titles published in the market provide metadata using the ONIX standard.

ONIX 2.x has been in place for more than a decade and a half. The number of publishers using ONIX 2.x now, as well as those providing metadata in other ways, have made the U.S. market a difficult one to move to a new standard. Systems, procedures, and investments made around ONIX 2.x compound the difficulty of migrating to a new standard. The growing number of ONIX recipients, many requiring specific 'flavors' of the ONIX message, is also a factor.

Within the U.S., efforts to improve metadata efficiency and effectiveness across the supply-chain have met with mixed results. In 2012 BISG commissioned a comprehensive study of metadata provision and receipt. An initial sunset date for ONIX 2.1 had been announced around that time, and BISG wanted to develop a reasonably comprehensive picture of the current state. As a result of this research, several opportunities to improve metadata processes were identified. They included:

- Adopt the practice of comparing metadata to the actual product at the time a book is printed or an e-book file is created (create an internal feedback loop).

- Create stronger feedback loops between recipients and senders, to improve the quality of supplied metadata.

- Confirm shared definitions for metadata fields like page count (well-defined in the specification but not uniformly interpreted by senders and recipients).

- For recipients, clearly articulate when updates occur and what gets updated and what doesn't.

- For both senders and recipients, improve the discussion about what metadata is changed, added, and deleted throughout the supply chain.

In addition, the research uncovered opportunities to "future-proof" the use of metadata in the supply chain. Recommendations for doing so included:

- Senders and recipients should collaborate to further automate data workflows and compress cycle times.

- Senders and recipients should also prepare for more frequent metadata updates, particularly concerning price.

- The processes used to prepare metadata for print and digital products should be harmonized, prior to or coincident with a move to ONIX 3.0.

- The use of style tags within ONIX should be reconsidered; the use of such tags often creates problems for recipients, many of whom have taken to stripping the style tags as a matter of practice.

- Engage new supply-chain entrants and encourage them to understand and support the use of ONIX.

Work to address these recommendations began in mid-2012, after the study was completed. Progress was limited, and after a period of time, the work was tabled while considering other pressing metadata-related issues (whether digital products should be assigned unique ISBNs is an example).

Over time, data recipients have increasingly customized their use of ONIX, forcing data providers to generate unique feeds for specific recipients. Major publishers today talk of generating as many as eight (8) feeds for different recipients. This practice presents several operational challenges, costs providers time and resources, and likely drives up the expense of managing metadata across the supply chain.

"Flavors" of ONIX also complicate efforts to certify publishers' metadata feeds. With multiple 'interpretations' of the standard, publishers lack a baseline against which to measure success.

ONIX 3.0 in the United States

BISG recognizes that U.S. adoption of ONIX 3.0 lags other countries. Following the ONIX International Steering Committee meeting that took place in London in March 2017, BISG formed an ONIX 3.0 working group to examine options to move the U.S. to the current standard.

A number of publishers, intermediaries, and systems providers are already ONIX 3.0-enabled. Given the size and complexity of the U.S. market, any transition will take time. BISG can work to reduce the time and parallel resources required, and the approach described later in this plan can be used to that end. Because publishers and retailers lack

the components of a business case to justify investment to move to ONIX 3.0, the working group tried to develop a business case for adopting ONIX 3.0 in the U.S. market.

The primary benefits of using ONIX 3.0 in the U.S. market include:

- Improved data about series (collections). Product 'series' are widely recognized as a powerful marketing tool that increases sales to existing customers.
- Additional and more reliable information about digital products. Digital products account for most of the growth in the market over the last decade.
- More accurate and actionable market and supply detail information. This matches the increasing complexity of international markets (and the growth in export sales for US publishers).
- Access to the complete range of collateral a publisher may provide. Publishers produce a wider range of (particularly digital) collateral material aimed at both reseller and consumer.
- Enhanced ability to describe and support new business models, including models like 'subscription', rental and so on that cannot be described in ONIX 2.1.
- Future benefit: Availability of block updates (reducing size of update files)
- Elimination of obsolete and deprecated data structures means fewer variations in the data and a more streamlined ingestion process for recipients
- Availability of 'Acknowledgement message' to increase feedback and automation
- Better documentation and support, and commonality with ONIX markets elsewhere

A move within the U.S. to use ONIX 3.0 may also benefit independent Canadian publishers, some of whom have accepted government funding to be ready to deliver ONIX 3.0 files to data recipients.

The working group found a range of examples that show the time and cost required to migrate to ONIX 3.0 is manageable. Estimates are not precise, but publishers are typically reporting that making their data workflows ONIX 3.0-ready took less than $30,000 in dedicated IT support. The investment required of data recipients is said to be larger, with more research needed in this area.

Medium-size and smaller presses that use intermediaries and systems providers to manage their metadata may not incur any significant expense, as their vendor base is likely to already support ONIX 3.0. Firebrand, Klopotek, OnixSuite, Booksonix, Virtusales, and others (particularly those whose client profile includes non-U.S. publishers) have invested over the past few years to support ONIX 3.0.

The extent to which data aggregators and distributors are ready to move to ONIX 3.0 needs to be confirmed. In its review, the working group found that Bowker and Ingram will accept ONIX 3.0. Baker & Taylor is processing ONIX 3.0 for both print and digital inbound and has the capability of sending ONIX 3.0 for digital only.

Among retailers, readiness is mixed. Digital-only retailers (Rakuten Kobo, Google Play) are seen as ONIX 3.0-ready. The working group learned this summer that Rakuten Kobo would like to move all of its publishers to ONIX 3.0, and it is working this fall to build its own business case for the current standard.

Within the U.S. market, other retailers (e.g., Amazon, Barnes & Noble) are not ready to accept ONIX 3.0 for both physical and digital products. The significance of these retailers for many publishers creates a 'chicken and egg' challenge for the market. Without retailer engagement, publishers currently using ONIX 2.1 feel little urgency to invest in the current standard. Even if the total investment required is moderate, it is still an expense that can be put off until retailers require an ONIX 3.0 feed.

To address this situation, BISG plans to lead a five-part, ongoing effort to support adoption of ONIX 3.0 in the U.S. market. Core components include:

- Improved fact finding ("Moving past anecdote")
- Deliberate outreach
- Creating a refined business case with international participation
- Persistent public communication
- BISG-sponsored education

These initiatives are presented in greater detail in the following sections.

Improved fact finding

BISG created the ONIX 3.0 implementation grid several years ago, around the time that plans and a timeline to sunset ONIX 2.1 were announced. The grid was maintained for a period of time, but it no longer reflects the state of the U.S. market.

Between November 2017 and the end of January 2018, BISG will revisit the grid, expanding it to list the full range of publishers, systems providers, data recipients, retailers, and others. The grid will capture use (or non-use) of ONIX 3.0 as well as any timelines for a change in status.

We will also work to cover the parts of ONIX 3.0 used by publishers or supported by data recipients. These include product types, tags, code list values, and block updates. The more granular information is expected to give publishers a better sense of the functionality they can expect to obtain with a move to ONIX 3.0. Greater transparency helps identify:

- Where data elements newly available in ONIX 3.0 are supported
- Where senders may be putting ONIX 2.1 data into an ONIX 3.0 'shell'
- Where recipients are not actually ingesting any new data, but instead are just processing the ONIX 3.0 file structure.

The apparent growth of customized feeds and 'flavors' of ONIX 2.x make it important to understand how senders, intermediaries or recipients customize or ask to receive customized ONIX 2.1 feeds. Some precision is required to understand current practices.

We will work to separate legitimate cases for individual feeds (sensitive price information, retailer exclusive promotional titles, etc.) from other reasons, which (as examples) could include: feeds changed to feature an older code instead of a new one; or tags used for the 'wrong' data element.

To the best of our ability, we'll also work to understand who asks for the changes, why the customization is needed, and whether a shift to ONIX 3.0 afford an opportunity to reduce or eliminate the need for customization. Senders and recipients in the U.S. market may also benefit from sustained education, communication, or clarification of best practices, some of which is already anticipated in this plan.

To keep track of existing practices, 'exceptions' may be listed separated or added to the ONIX 3.0 implementation grid. To the extent that the causes of customization can be managed, we may develop a timetable for their reduction or elimination.

Deliberate outreach

After the implementation grid is updated and published, BISG's executive director will schedule conversations, held in person or remotely, to better understand the current and expected positions for major retailers (Amazon, Barnes & Noble, Apple, and others) and the largest (top 20) publishers. These conversations, which will take place between February and April of 2018, will be kept confidential, but common themes emerging from them will be brought back to BISG's Metadata committee for consideration and possible resolution.

In addition, BISG will target publishers working with systems providers that are ONIX 3.0-ready to highlight the value of moving to the current standard. For systems providers that are willing, we will work to create a "how to" document illustrating ways that publishers already on these platforms can cost-effectively migrate to use of ONIX 3.0. We will work to make this happen in the same time frame (February to May) planned for one-on-one conversations with retailers and publishers.

Where publishers, systems providers, distributors, or retailers are willing, we will share technical roadmaps with planned timing for rollout and implementation of ONIX 3.0. We recognize that some supply-chain participants may hold back certain information. The intent here will be to show progress, or an intent to implement, where possible.

Refined business case with international participation

At Frankfurt Book Fair, BISG noted that we could use help from representatives in other markets to better understand the business benefits of ONIX 3.0. We also could use help understanding how other markets moved quickly and completely to use of ONIX 3.0. We have a sense that the structure of the U.S. market works against rapid and complete migration.

We expect to be able to learn the business benefits of using ONIX 3.0 from publishers, data recipients, and retailers in markets that have moved from ONIX 2.1 to ONIX 3.0. An example could be Germany, where a fairly rapid transition is taking place. The review may also include a comparative view through participation of multinationals with a presence in both the United States and the United Kingdom. Some UK companies have already adopted ONIX 3.0 (PRH, Macmillan) and may provide useful benchmarks.

Ahead of the London meeting of the International Steering Committee (April, 2018), we will prepare a summary of the U.S. business case, accompanied by concerns, gaps, or objections raised during outreach conversations. We will ask the steering committee for feedback, in writing, at the in-person meeting, or elsewhere.

Persistent public communication

BISG's Metadata Committee will convene three discussions among (in turn) publishers, data recipients, and (after the two separate meetings) a summit of publishers, distributors, aggregators, and retailers. The timing of these discussions will be determined in part by availability of key participants. We propose the publisher meeting for May 17, the retailer gathering for July 25, and the joint publisher/retailer summit for September 17.

Tentative agendas include the following:

May 17: What do publishers need?

Publishers articulate what they need to achieve, within their businesses, to justify moving forward. Will include:

• Retailers supporting ONIX 3.0 (meaning that recipients will take data points in 3.0 that they don't currently take in 2.1)

• Better processing consistency across recipients - that is, better adherence to the standard and best practices. Publishers hate having to make many and various exceptions / changes to the ONIX output for recipients. This includes taking 3.0 for all product types, not just for eBooks, as well as eliminating non-standard interpretations of the supplied data

- Address concerns with perceptions of ONIX 3.0's flexibility. To meet expressed business requirements, the ONIX 3.0 standard can carry many different types of data. As well, the range of types can be extended easily. While individual data elements are no more 'flexible' than in 2.1, and ONIX 3.0 elements are often better and more precisely specified, both data senders and data recipients in the U.S. market feel they need more direction/standardization before moving to ONIX 3.0

- Review of international use cases, with comparisons done by multi-nationals where possible, plus maintenance and supply of data elements that meet individual business needs

- Estimate of cost and effort to implement 3.0.

July 25: What do recipients want?

Retailers articulate what data they want publishers to supply in 3.0, in order for the shift to be meaningful and worthwhile. Likely to include:

- Better Series Data (Collections information)
- More information about digital products
- Accurate market and supply detail information
- All the marketing collateral available from a publisher
- Estimate cost to implement 3.0.

Participants will be asked to share their publisher guidelines for ONIX 3.0 to help identify areas in which best practice may not have been implemented.

In migrating to ONIX 3.0, recipients will be asked to help the supply chain reduce or eliminate the number of variations publishers must support using ONIX 2.1. This can also provide benefits for data recipients in several ways (avoiding the need to build multiple extracts; consistent data mapping; and uniform or shared parsers).

September 17: Data Recipient / Publisher summit

- Create agreement on the problems to be solved
- Overcome barriers / reluctance on both sides
- Establish realistic goals and timelines
- Develop agreements on implementation best practices (don't migrate bad practices used to manage ONIX 2.1 to ONIX 3.0)
- Identify opportunities to use ONIX 3.0 as a baseline for certification
- Develop and confirm target dates for implementation

Throughout this period, the implementation grid will be updated as new information is received, and the content of the grid will be summarized for the BISG community on a monthly basis. BISG will also develop, publish, and update an "ONIX 3.0 FAQ", a document that will go live before the first (publisher) gathering.

An update on the work completed and the progress made through September 2018 will be provided in writing to members of the ONIX International Steering Committee ahead of the October 2018 meeting at the Frankfurt Book Fair. It may be discussed there, at the discretion of the committee.

Education

Throughout 2018, BISG will provide or identify resources capable of providing support (e.g. training events, consultation, in-person hand-holding, etc.), on aspects of ONIX 3.0 that are a significant selling point for the standard (e.g. e-book metadata).

Over that same time, a weekly BISG newsletter (planned for launch in January 2018) will offer regular tips that support 3.0. We will look to EDItEUR, the BISG Metadata committee, and publishers using ONIX 3.0 to offer content in areas like:

- Did you know that in 3.0 you can associate an author with a city – something you can't do with 2.1 – and retailers could use that info for 'local author' promotions? or
- Having difficulty communicating your rights data? Have you seen how ONIX 3.0 handles each market?

Conclusion

BISG and its Metadata committee anticipate focusing resources throughout 2018 on making a case for adoption of ONIX 3.0 in the U.S. market. Full implementation requires progress in areas BISG does not directly control, but we will make it a priority to communicate the benefits and implications throughout the coming year, as outlined in this document.

Final draft prepared for International Steering Committee review: December 27, 2017