

Diversity and inclusion – using *Thema* and ONIX to improve discoverability

With the huge range of published books available to the reading and listening public, good metadata is vital to help guide searches, allowing booksellers, librarians and educators to discover titles and make informed choices, as well as improving the discoverability of titles by readers themselves. Subject classification schemes are one of the key areas of metadata to aid improved discoverability and thereby drive improvements in sales.

Two aspects of book discoverability are particularly relevant: a desire to find books that increase awareness of the importance of diversity and inclusivity, and books which themselves are exemplars of diversity and inclusion. In book publishing for children and teenagers in particular, one important aim is to help young people understand the world around them, as well as their own situation and life. And for child and adult readers alike, it may reflect a desire to find books that they can identify with, or that help them expand their own horizons.

Diversity is the range of human differences including, but not limited to, culture, ethnicity, gender and gender identity, sexual orientation, age, socio-economic status, physical ability or attributes, disability, religious or ethical value system, national or regional origin, political beliefs, family structure, etc. Inclusion is the deliberate act of welcoming diversity and creating an environment where all kinds of people can thrive and succeed. An inclusive culture makes people feel respected and valued for who they are as an individual or group and lessens feelings of being marginalised or excluded by society.

Booksellers, educators and librarians spend time and effort searching for titles that are suitable for the communities they serve, and it's often hard to find all the relevant information – so the better the quality of the book metadata, and the better its availability, the greater the potential sales. It can be frustrating for a bookseller who has to wade through hundreds or thousands of titles with minimal metadata just to find two or three that are suitable for some specific need – it's far better if they can select the two from only ten that are pre-selected for their relevance.¹

Potential readers may feel excluded if they find it difficult to discover titles they can relate to or identify with. Minority or marginalised groups of potential readers should be able to find titles as easily as anyone, and publishers and booksellers should be making use of all the information available about contributors and titles to facilitate the discoverability of these titles.

New and diverse voices find it harder to be heard if the information available about their titles is too broad and generic, or too basic, giving none of the relevant metadata for the content of the work or its potential audiences. The sales of these titles may be directly affected by the difficulties in discovering them, which may in turn deter publication of future works by diverse voices.

¹ the document *Thema for booksellers* gives a good introduction and overview:
<https://www.editeur.org/151/Thema/#Documentation>

The idea behind this document is to spark ideas on how to use *Thema* and ONIX to highlight books relevant to subjects of diversity and inclusion, or that would appeal to diverse groups, as well as to provide some suggestions for sending complementary information in ONIX which makes those titles more discoverable. It's meant to inform discussion about how you use standards to communicate information about your books, and maybe drive improvements within your organisation.

This is only a small selection of ideas: the document isn't intended to cover every aspect of diversity around the globe, and you're encouraged to look at the *Thema* categories and qualifiers, and ONIX, in the context of your own products or requirements.

Q.1 What are the main areas of Thema to be looking at when it comes to improving the discoverability of titles that cover aspects of diversity and inclusion?

The *Thema* subject category scheme² has always included certain elements that help identify such books, and the latest version (*Thema* v1.4) has strengthened these³. The most important aspect of *Thema* in this regard is its range of qualifiers⁴. Qualifiers are used to add precision or nuance to a subject category – for example, a location, setting or milieu the book is set in, what style of music or what language the book is about, a specific group of people who feature in the book, or a group which might be particularly interested in reading it. The qualifiers provide not only nuance for a particular book, but also a bridge to related titles across a broader range of subjects.

Qualifiers in *Thema* are never used alone – they must have a subject which they qualify. They are always used alongside more conventional subject codes, but they can be important as a way of identifying, for example, a list of history books about a specific period, or of young adult novels of potential interest to an educator with a multicultural classroom or to a teenager trying to understand their own identity.

Interest qualifiers cover, *inter alia*, some aspects of diversity and inclusivity. There are codes that allow publishers to flag titles that are suitable for readers who may otherwise feel excluded from reading. These include:

SAR – For reluctant or struggling readers (children / teenagers) These are usually books with a higher interest age and a lower reading age. These titles are important for parents, educators and librarians *etc.* who are trying to make sure children do not get left behind and want to find reading material that will engage their interest and encourage them to read.

SAX – For adult emergent readers is another important flag. This allows publishers to indicate titles that are suitable for adults who have difficulty reading or who are 'newly literate' – whether because of prior educational issues or because they are learning a second language.

SAZ – For people with learning / communication difficulties this allows publishers to indicate titles where the content is specifically adapted or written for, or is aimed at, people with special or additional needs, such as content adapted for those with dyslexia or learning difficulties, or content adapted for those with dementia or visual impairments.⁵

² For further details of *Thema*, see <http://www.editeur.org/151/thema> – most particularly the executive briefing at https://www.editeur.org/files/Thema/20200407_Thema_briefing.pdf – and an interactive browser at <https://ns.editeur.org/thema>

³ This note has been updated to reflect the release of *Thema* v1.4 in April 2020

⁴ *Thema* qualifiers have codes that begin with a digit – 1 for Place qualifiers, 2 for Language and so on. In contrast, *Thema* subject categories have codes that begin with a letter

⁵ For ways to indicate accessible digital content for print impaired readers in ONIX, see the EDItEUR Application note on *Accessibility metadata in ONIX* at https://www.editeur.org/files/ONIX_3/APPNOTE_Accessibility_metadata_in_ONIX.pdf

Another group of qualifiers under [5P*](#) allows a publisher to flag titles that may be of interest to specific groups of people by combining these qualifiers with relevant subject categories. Those under [5PB – Relating to peoples: ethnic groups, indigenous peoples, cultures, tribes and other groupings of peoples](#) include qualifiers that identify material about or of interest to groups of people, including for example:

[5PB-US-C – Relating to African American people](#)

[5PB-GB-AS – Relating to British South Asian people](#)

[5PB-AU-A – Relating to Australian Aboriginal peoples and Torres Strait Islanders](#)

[5PBD – Relating to peoples of African descent](#) ⁶

[5PBA – Relating to indigenous peoples](#) ⁷

There are also groups of qualifiers that can indicate things like a relationship to particular religious groups ([5PG](#)), to groups of people with visible or hidden disabilities, impairments or conditions ([5PM](#)) as well as groups based on gender, gender identity or sexuality. Any of these qualifiers can be used – with a subject category – to identify titles of relevance, and this allows booksellers, retailers, librarians or educators to create and curate lists or highlight individual titles about or of particular interest to a certain group.

Within the main subject categories of *Thema*, there are many subject themes that are important for diversity and inclusion. These are particularly critical for children and teenagers, and the themes are reflected in a list of categories under [YX* – Children’s / Teenage: Personal and social topics](#) ⁸. These categories can be used on their own for titles *directly about* one of these topics, or in conjunction with other categories especially the [YF* – Children’s / Teenage fiction and true stories](#) categories to indicate fiction titles that tackle these topics *indirectly*. When using combinations of categories in this way, care must be taken to ensure the category which is considered the *main* subject is clear (in ONIX 3.0, for example, by using the `<MainSubject/>` flag). Non-fiction titles about multiculturalism would use [YXM – Children’s / Teenage personal and social topics: multicultural](#) as the main code whereas a work of fiction that heavily but incidentally features a multicultural theme must always have a Fiction category as the ‘main’ subject.

Examples of these [YX*](#) codes include:

[YXB – Children’s / Teenage personal and social topics: LGBTQ+](#)

[YXC – Children’s / Teenage personal and social topics: gender identity](#)

[YXK – Children’s / Teenage personal and social topics: disability, impairments and special needs](#)

[YXN – Children’s / Teenage personal and social topics: racism](#)

[YXP – Children’s / Teenage personal and social topics: diversity and inclusion](#)

[YXPB – Children’s / Teenage personal and social topics: prejudice and intolerance](#)

[YXM – Children’s / teenage personal and social topics: multicultural](#)

[YXZM – Children’s / Teenage social issues: migration and refugees](#)

It is a good idea to read the notes that accompany these categories, in particular, the note attached to code [YXP](#) specifies it can be used for *‘books that deal with these topics and stories with a particularly diverse cast of characters, or which illustrate inclusivity within the context of the story without necessarily being the subject of the story. Use with: YF* codes for stories and values from 5P* INTEREST Qualifiers as appropriate.’* This illustrates the building-block (post-coordinated) nature of *Thema* which allows subject categories to be combined to give a deeper view of the subject and content of a book.

⁶ See the note for this qualifier for usage : <https://ns.editeur.org/thema/en/5PBD>

⁷ This qualifier would be used with Place or Language qualifiers to give greater detail of a particular group that identifies as indigenous

⁸ These categories were labelled ‘social issues’ in 1.2, but are relabelled ‘social topics’ from version 1.3 (April 2018)

There are two categories that allow publishers to indicate titles that are about girls or boys, female or male role models or titles where the theme or main characters are strongly linked to girlhood or boyhood:

YNMF – Children’s / Teenage general interest: Girls and women

YNMH – Children’s / Teenage general interest: Boys and men

Finally, *Thema* has a selection of categories (**FX***) for specific special features of *adult* fiction (e.g. satire or humour) and narrative themes (e.g. coming of age, death and grief etc). One of the latter is **FXS – Narrative theme: Social issues** which can be used with a relevant main genre fiction code, and further supplemented with an additional (non-fiction) code to highlight a particular social issue. For example a novel that deals with social issues around discrimination could include the *Thema* code **JBFA – Social discrimination and equal treatment** alongside its main (adult fiction) subject code(s). Other categories in this section that could be used to identify fiction that has strong themes that could be linked to questions around diversity and inclusion include **FXN – Narrative theme: Identity / belonging** and **FXQ – Narrative theme: displacement, exile, migration**.

The multilingual online browser for *Thema* can be found at <https://ns.editeur.org/thema>. You can look up all the subject categories and qualifiers shown in these examples and review the headings in multiple languages. It’s one of the best ways to search for different subjects – the search is flexible as it looks at the codes, headings, notes and other text in the scheme. When reviewing these, it is important to remember that in *Thema*, the alphanumeric *code* – the element that’s used in the exchange of metadata about a title – and its *meaning* remain constant, and the wording used in this document reflects the heading text on the official documents.

A third party using *Thema* might choose their own wording or even their own language for public display and presentation of subject headings, and so long as that wording doesn’t modify the *meaning* of the category or qualifier, it may be more suitable in a particular context. They may also map certain subject categories or qualifiers to broader proprietary categories on their own websites or systems but providing the appropriate level of detail in the original metadata allows those who receive *Thema* codes to choose what level of detail they want to display and what they want to keep for detailed searches.

Q.2 What information that can be included in ONIX messages should we be looking at when it comes to improving the discoverability of titles that cover aspects of diversity and inclusion?

In an ONIX message, each part of the metadata is important to some part of the global book supply chain, but there are some key areas to look at when looking at questions around diversity and inclusion, including information around the notion of accessibility of titles.

Contributors – biographical information and associated locations and professional affiliations can help highlight titles that may be of interest. Looking for contributors from other countries or who may have migrated or lived in multiple places can all be interesting information – as long as the contributor themselves has consented to make this publicly available⁹. Biographical information about authors, editors, illustrators etc is critical to help increase the visibility of diverse contributors in the global book supply chain.

Language information – this is important for works that have been translated from other languages – another way of finding new, diverse and authentic voices from other cultures or to discover titles that

⁹ Reputable publishers check their biographies with the contributors concerned whenever possible, to ensure their *public* identity is presented as the contributor would wish – see Q.3 below

may be available as bilingual editions, for example. ONIX has fields to indicate the name of the translator as well as the language from which the book was translated (see [code lists 22](#) and [74](#)), the language(s) the work is published in, and also which script ([see list 121](#)) the text uses.

Subject – this is where the *Thema* categories and qualifiers are sent in the ONIX file, as well as subject schemes such as the US BISAC¹⁰ scheme or library classifications which have certain categories or codes that are suitable for highlighting diversity. This is also where you can include `<NameAsSubject>`, another element in ONIX that is useful to highlight certain aspects of diversity and inclusion¹¹.

Keywords – a carefully selected list of keywords can include current or in vogue words and phrases that can help highlight titles around diversity and inclusion topics, and these keywords can be updated to reflect emerging terminology or trending terms

Audience – beyond the basic audience codes ([list 28](#)), ONIX allows for descriptive text about potential audiences for a title that gives an opportunity to describe potential audiences for the title in more detail. This can be sent in the `<AudienceDescription>` data element.

Marketing collateral – is all the marketing information about your titles being included in your ONIX feed? Are you updating this information with new material from the marketing department, or with information from the authors, who will often also do their own promotion? ONIX 3.0 allows you to send different texts for public display, book trade audiences, teachers, bloggers *etc* (see [list 154](#)).

Descriptive text – the book description, the table of contents, the promotional headline, review texts from diverse media sources, extracts from the title, the audience description, the description of the illustrations, *etc* are all areas of metadata where you can convey information about titles and their relevance to the aspects of diversity and inclusion you're looking at. ONIX 3.0 also allows for these texts to be sent in multiple languages in parallel. Sending some of your descriptive text in other languages – maybe other languages spoken in your country, or in some of your key markets or by the community your contributor is from – gives more opportunities for search engines to find your titles and potential readers to discover the titles.

Prizes and awards – there are many awards given in the book world, and a high proportion are specialised and can highlight interesting titles in various areas of diversity and inclusion.

Promotion details – a new part of ONIX 3.0, this allows detailed, structured information about events like author signings, appearances, tours *etc*. Making this information more visible across the supply chain will help boost the visibility of diverse authors by giving more opportunity to connect and highlight alternative media channels with actual appearances of the author. This could allow influencers to point to visible schedules of diverse authors appearing in bookshops and potentially bring new audiences into them.

Content detail – chapter level metadata, this is a key part of ONIX for audiobook and scholarly publishing metadata, and a potentially an important extra area of metadata to boost the discoverability of diverse authors. This part of ONIX 3.0 allows you to send not only the titles of individual chapters or parts of a work, but also to associate contributors at this level, include descriptive texts, keywords, subject codes *etc* – essentially, you can provide a mini-record of metadata for each chapter. Such detailed, well-structured data is very important for search and discoverability both by search engines and for voice search.

Edition information – ONIX [list 21](#) includes options for edition types like Large or Ultra large print, High readability, Simplified language, Braille, Bilingual or Multilingual editions.

Accessibility information – ONIX allows publishers to indicate if a digital title is accessible for print-impaired readers, whether it meets standards like the EPUB Accessibility specification, and what accessible features that title carries.

Product relations – is the title available in another format that's more accessible to certain types of readers, in digital, large- print, audio *etc*?

¹⁰ More about BISAC subject codes can be found here : <https://bisg.org/page/BISACSubjectCodes>

¹¹ See the Annex to this document for some examples of use.

Publisher information – where was the title published – the `<CityOfPublication>` and `<CountryOfPublication>` – can be important if you're trying to broaden the range of titles from different cultures. Are you supporting publishers from Africa or Latin America, for example? Or publishers outside the traditional main metropolitan publishing centres?

Supplier and price information – ONIX carries all the essential information about where the title is available, from whom, and at what price. Clear supply chain information about where the title can be ordered from makes titles more easily available to a larger potential audience, and ONIX enables specialist publishers of diverse and inclusive works to maximise their reach and make their products available to a global audience. Price is also important: is the title at a price that makes it accessible to a broad and diverse audience?

Q.3 We want to make sure that the diverse contributors we publish are easier to discover and far more visible. Can ONIX and Thema together help with this?

The ability to discover diverse and often marginalised voices once they are published is important, and both ONIX and *Thema* can help with this. The `<Contributor>` composite in ONIX allows for a range of information to be included about writers, illustrators and others who contribute to the work. When it comes to how an individual contributor wishes to identify themselves, this is somewhat personal information that should come initially from the contributor themselves, and ideally should only be part of any descriptive text with their explicit consent. Consent and agreement are very important when communicating biographical information about any contributor.

When we're talking about information about an individual person, that if included in the metadata could be displayed publicly, there is no universally agreed list of codes or terms that can be used to describe an individual contributors' identity, as this is a very personal thing – the words used should be the choice of the person themselves. They can vary a lot, can change through time, and cannot simply be reduced to a list of codes. There are terms that are used to group people together for statistical or census reasons, or because of cultural usage, which may be useful, but these terms aren't necessarily acceptable to all who fall into each group. There are accepted norms in different languages and countries, but they will differ according to current (and continually changing) cultural usage, or through personal choice of the contributor themselves. Therefore, ONIX has no simple code list of 'identities' but both ONIX and *Thema* do provide various options to help highlight diverse contributors.

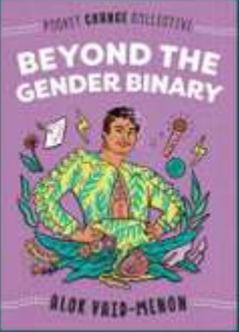
Q.4 What elements of the contributor composite itself could be useful in highlighting diversity in some of my markets?

In ONIX the `<Contributor>` composite can potentially be used to send rich information about a particular contributor¹², and it is a good idea to review the ONIX documentation to see the full possibilities. One of the most important elements in regard to the identity of a contributor is the `<BiographicalNote>`.

This should be written in natural language, be clear, and should ideally use the contributor's preferred vocabulary for describing themselves. Consider getting the contributor themselves to write the text, or at least approve it and confirm for example pronouns, and any other words or phrases used, are what they prefer. The biographical text could include terms and phrases that will be picked up by searches when potential readers are looking for diverse authors, poets, illustrators, *etc.*

¹² See ONIX code list 17 for all the different contributor *roles* that can be sent in an ONIX record <https://ns.editeur.org/onix/en/17>

Example 1 , Alok Vaid-Menon: here the contributor themselves wrote the biographical description to be sent with their books and it includes their preferred pronouns, vocabulary and terminology



```

<Contributor>
  <SequenceNumber>1</SequenceNumber>
  <ContributorRole>A01</ContributorRole>
  <PersonName>Alok Vaid-Menon</PersonName>
  <PersonNameInverted>Vaid-Menon, Alok</PersonNameInverted>
  <NamesBeforeKey>Alok</NamesBeforeKey>
  <KeyNames>Vaid-Menon</KeyNames>
  <BiographicalNote textformat="05"><p><strong>ALOK </strong> (they/
  them) is a gender non-conforming writer and performance artist. Their
  distinctive style and poetic challenge to the gender binary have been
  internationally renowned. As a mixed-media artist Alok uses poetry,
  prose, comedy, performance, lecture, fashion design, and portraiture to
  explore themes of gender, race, trauma, belonging, and the human
  condition. They are the author of <cite>Femme In Public</cite> and
  <cite>Beyond the Gender Binary</cite>. In 2019 they were honored
  as one of NBC's Pride 50 and Out Magazine's OUT 100. They have
  presented their work at 500 venues in more than 40 countries.</p>
  </BiographicalNote>
</Contributor>
  
```

Along with **<BiographicalNote>**, ONIX also allows for the creation of short headline texts for contributors that can be sent as **<ContributorDescription>**. This should be a short sentence with only the most important information that could aid recognition or deliver key terms that identify diverse voices. It can if necessary can be repeated in different languages, for example if the author has more than one maternal language, you could include the headline in the person's other language, at least for search purposes.

```

<ContributorDescription language="eng" textformat="05"><p>Dean Atta is a British poet of
Greek Cypriot and Caribbean descent. He has been listed by <cite>The Independent</cite>
newspaper as one of the 100 most influential LGBT people in the United
Kingdom.</ContributorDescription>
  
```

```

<ContributorDescription language="eng">George Lester is a freelance editor, musical theatre
lover and drag nerd who is also a Drag Queen under the name 'That
Gurrrr1'.</ContributorDescription>
  
```

The **<Contributor>** composite has an optional **<ContributorPlace>** composite. This is used to send information about a contributor's relationship to a country, region or a named place like a city. They may have been born in one country, but are now a citizen of another, or be currently resident in a city in a third country. These relationships to a place are expressed using the values from [list 151](#).

List	Code	Heading	?
151		Contributor place relator...	*
151	00	Associated with	*
151	01	Born in	
151	02	Died in	
151	03	Formerly resided in	
151	04	Currently resides in	
151	05	Educated in	
151	06	Worked in	
151	07	Flourished in	*
151	08	Citizen of	*
151	09	Registered in	*
151	10	Operating from	*

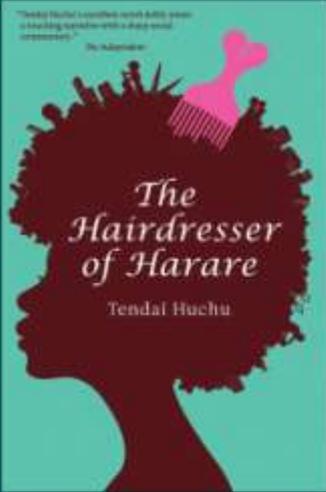
You can send these place relationships with an ISO **<CountryCode>** ([list 91](#)) or a **<RegionCode>** ([list 49](#)), and in a free text **<LocationName>** for a more precise location within a country or region. This free text field could be a town or a city, or a named entity such as a traditional cultural region. As **<LocationName>** is a descriptive text field it can be repeated in different languages and scripts.

This information makes it easier to match local authors to local bookshops, for example, or to highlight writers from different cultural backgrounds, emigres, immigrants or to find overseas authors whose works are available in your country (including works in translation).

As an example, a Canadian author who is from a Canadian First Nation could be highlighted like this:

```
<ContributorPlace>
  <ContributorPlaceRelator>08</ContributorPlaceRelator>    <!-- Citizen of -->
  <CountryCode>CA</CountryCode>                             <!-- Canada -->
</ContributorPlace>
<ContributorPlace>
  <ContributorPlaceRelator>01</ContributorPlaceRelator>    <!-- Born in -->
  <RegionCode>CA-ON</RegionCode>                             <!-- Ontario -->
  <LocationName>Chippewas of Rama Mnjikaning First Nation</LocationName>
</ContributorPlace>
```

Example 2: The Hairdresser of Harare by Tendai Huchu (Ohio University Press)



The book cover features a silhouette of a woman's head with a large afro hairstyle. A pink comb is positioned at the top of the afro. The title 'The Hairdresser of Harare' is written in a white, serif font across the middle of the afro, with the author's name 'Tendai Huchu' below it. The background is a solid teal color.

FBA – Modern and contemporary fiction
FXD – Narrative theme: Love and relationships
1HFMW-ZW-A – Harare

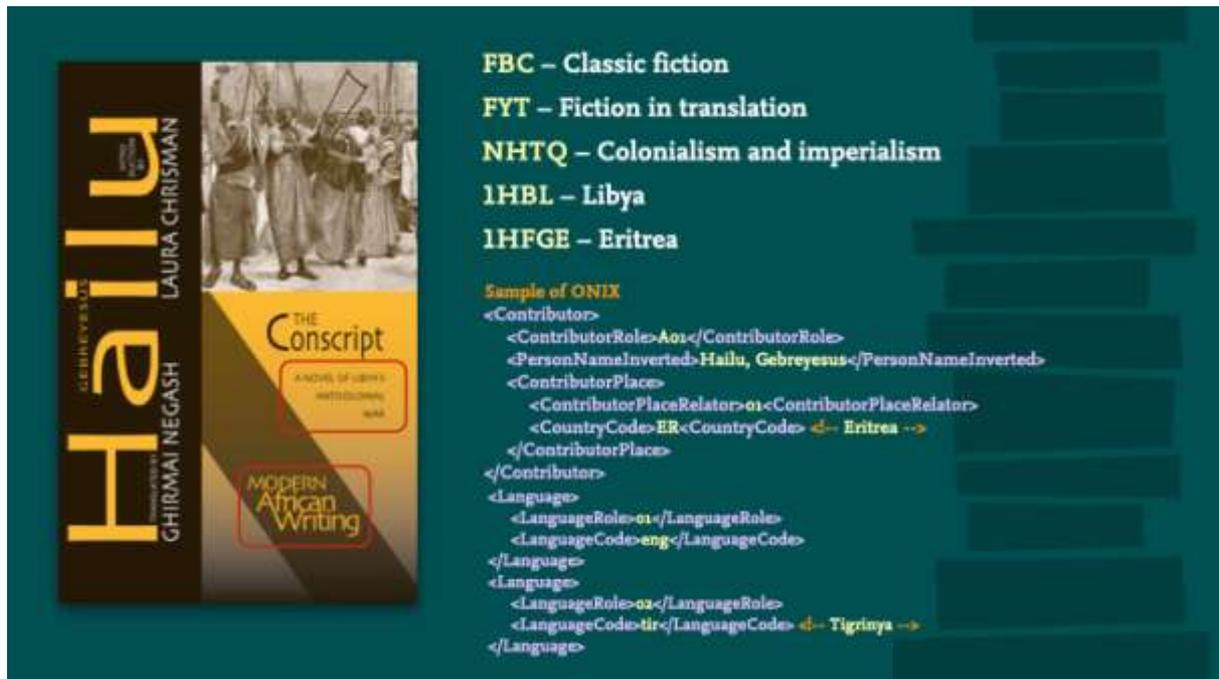
```
<Contributor>
  <NameIdentifier>
    <NameIDType>16</NameIDType> <!-- International Standard Name Identifier (ISNI) -->
    <IDValue>0000000108077158</IDValue>
  </NameIdentifier>
  <ContributorRole>A01</ContributorRole> <!-- Author -->
  <PersonNameInverted>Huchu, Tendai</PersonNameInverted>
  <ContributorPlace>
    <ContributorPlaceRelator>08</ContributorPlaceRelator> <!-- Citizen of -->
    <CountryCode>ZW</CountryCode> <!-- Zimbabwe -->
  </ContributorPlace>
  <ContributorPlace>
    <ContributorPlaceRelator>04</ContributorPlaceRelator> <!-- Currently resides in -->
    <RegionCode>GB-SCT</RegionCode> <!-- Scotland -->
    <LocationName>Edinburgh</LocationName>
  </ContributorPlace>
</Contributor>
```

This book was originally published in Zimbabwe by the Weaver Press and was later re-published by Ohio University Press. It's been translated into several other languages. Highlighting fiction written by authors from another country or cultural background who tell stories about other places and experiences can give educators, booksellers, librarians and readers a chance to discover more diverse voices.

The action of the novel takes place in Harare: the *Thema* place qualifier code for Harare **1HFMW-ZW-H** is included in the metadata, which allows any data receivers to display or to create lists, or to provide search options to find books *about* or *set in* Harare or Zimbabwe.

In the ONIX example we are adding the information that the author is a citizen of Zimbabwe – **<ContributorPlaceRelator> 08**. This adds to the information available to those who receive the data and would allow for the search and creation of lists of titles by authors from Zimbabwe, or from African countries. Included in the ONIX is the fact that he now lives in Edinburgh, Scotland, which bolsters the interest further. It allows booksellers or librarians in Scotland find out he is now a 'local author' but with an authentic Zimbabwean voice.

Example 3: *The Conscript* by Gebreyesus Hailu, translated by Laura Chrisman (Ohio University Press).



This work was originally written in the Tigrinya language in 1927, and first published in 1950. This is another title where both *Thema* codes and information in the ONIX file will highlight features that can help with discoverability.

Adding the *Thema* code **FYT** to indicate that this is a novel in translation, is important. Many retailers highlight translated fiction, and translated works are another way for readers to discover different experiences, and for booksellers and librarians to expose diverse voices to potential readers. **FYT** is complemented by the information sent in ONIX about the original language of the title **<LanguageRole> 02**. Information about the translator would also be included in the ONIX file.

Adding **NHTQ – Colonialism and Imperialism**, even though it is a non-fiction code, is useful in this case, as the major theme of the novel is the impacts of colonialism, and in truth, the novel might not be out of place in a history section. The two *Thema* place qualifier codes **1HBL – Libya** and **1HFGE – Eritrea** indicate where the novel’s events take place, and enables the discovery, display or creation of lists of books about or set in these countries.

Finally, in the ONIX record, adding the information that the author was born in Eritrea – using **<ContributorPlaceRelator> 01** – adds to the information available to those that receive the data and again highlights the authenticity of the authorial voice.

Example 4: Like a Mule Bringing Ice Cream to the Sun by Sarah Ladipo Manyika (Cassava Republic Press)



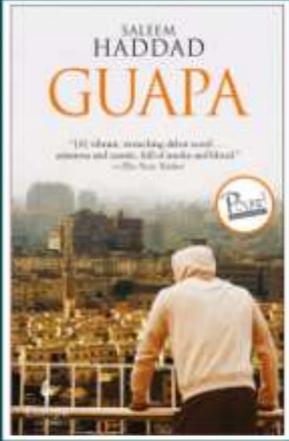
This is the story of a cosmopolitan Nigerian woman, about to celebrate her seventy-fifth birthday, who lives in San Francisco. It is about the range of people she meets, a subtle story about ageing, friendship and loss, this is also a nuanced study of the erotic yearnings of an older black woman.

FBA – Modern and contemporary fiction is the most appropriate main category, but **FQ – Contemporary lifestyle fiction** is also a good category as this is a story set in over a few days in a contemporary urban setting and deals with the day to day life of its female protagonist. The fact that it is set in San Francisco means it's good to use the place qualifier **1KBB-US-WPCF**. As this is a story that talks about ageing, problems linked to a fall, the sexuality of an older woman, adding the qualifier **5LKS – Relating to late adulthood / old age** indicates that the subject matter is about older people. **5PBD – Relating to peoples of African descent** is added here as the character is a Nigerian woman, living in an American city, but not necessarily identifying as African-American.

The ONIX information about the contributor is also very important here as her biography shows that she is a person with a very multicultural background and different experiences. Some of this information should also be included using **<ContributorPlaceRelator>** but it is also good to include these details in the biographical text.

Another detail in the metadata is the city where the title was officially published. This is a Nigerian publisher that has offices in Abuja and London, so has added both cities to the City of Publication information. The place where the title was published is another indicator that can be used to improve the visibility of diverse voices, by featuring titles that were originally published in other countries or outside the traditional metropolitan centres of the publishing industry.

Example 5: *Guapa* by Saleem Haddad (Europa)



FBA – Modern and contemporary fiction
FXD – Narrative theme: Love and relationships
FXN – Narrative theme: Identity / belonging
FXP – Narrative theme: Politics
1FB – Middle East
5PSG – Relating to Gay people

```
<Contributor>
<SequenceNumber>1</SequenceNumber>
<ContributorRole>A01</ContributorRole>
<PersonNameInverted>Saleem, Haddad</PersonNameInverted>
<NamesBeforeKey>Saleem</NamesBeforeKey>
<KeyNames>Haddad</KeyNames>
<BiographicalNote textformat="05"><p><strong>Saleem Haddad</strong> was born in Kuwait City in 1983 to a Lebanese-Palestinian father and an Iraqi-German mother, and educated in Jordan, Canada, and the United Kingdom. He has worked as an aid worker with Médecins Sans Frontières in Yemen, Syria, and Iraq, and currently lives in London, where he advises on inclusion of refugees, women, and young people in the transition and peace processes of the Arab Spring.</p></BiographicalNote>
</Contributor>
```

This story is set over 24 hours in an unnamed Arab country, hence the use of **1FB** rather than a more specific code. Rasa is a gay man trying to carve out a life for himself in the midst of the political and social upheaval. He explores his relationships with family, friends and his lover. The encounters in the novel leads the protagonist closer to confronting his own identity.

The most important category here is **FBA – Modern and contemporary fiction**, as this is where the novel would go in a bookshop’s shelving scheme, but the narrative theme categories give far more detail highlighting three major themes in the novel: **FXD – Narrative theme: Love and relationships** as the novel deals with the main character’s relationship with his grandmother, with his lover, with his friends and with others he meets; **FXN – Narrative theme: Identity / belonging** as the character is examining his identity as an Arab man, having been away to study in the USA, and as a gay man in a conservative society, so the novel explores the complexities of identity; **FXP – Narrative theme: Politics** as the background to the novel is the events of the Arab Spring and its consequences. The author does not state which country the action takes place in but using **1FB – Middle East** indicates that the action of the novel takes place in that region. The qualifier is important as it allows people looking for fiction set in the Middle East to find the title. Finally, the qualifier **5PSG – Relating to Gay people** is used, as one of the main topics of the novel is the protagonist’s sexuality. The 5* qualifiers are powerful tools for identifying titles that may be of interest to particular groups, and this is an example might allow the book itself to selected or be displayed in a broader LGBTQ+ fiction section of a larger physical store or an online bookshop.

The ONIX example shows the author’s biography, highlighting the author’s mixed background. This complexity cannot be expressed by simple codes but has to be explained in descriptive text.

Finally, this title won the Polari First Book Prize in 2017, another bit of information to highlight.

Q.5 In the examples you mention *Thema* qualifiers starting with 5P*. Can I not just use these to flag an author's identity?

No, these qualifiers are not meant to highlight the contributor's identity – they are about the content of the book. If the two are the same, then there will be an obvious overlap, but a title of interest to a particular group in 5P* may be written by a person who does not specifically identify themselves with that group. Equally, a contributor from that particular group may be writing about topics or subjects that have nothing to do with their identity. If the content does not correspond to the qualifier, that qualifier should not be used.

The 5P* qualifiers are vital when looking at questions of diversity or inclusion. All qualifiers and subject categories in *Thema* are about the *content* of a work, its subjects and themes, but these will often have a link to the writer or illustrator of the work. There will inevitably be an overlap with potential audiences, and these categories and qualifiers give information that delivers greater visibility to works that are about specific groups or topics. However, neither *Thema* subject categories nor qualifiers should be used as a marketing 'audience code'. If the title is not *about* the subject or topic, then don't use *Thema* as a proxy for other marketing information that can be sent in ONIX. This includes <AudienceDescription>, which allows a publisher to include free text with details of a potential audience, and other descriptive text fields that can be sent in ONIX.

Q.6 How can we include trending terms such as #OwnVoices, that might apply to highlight a diverse or marginalised voice?

The use of certain trending terms or hashtags have become important in certain markets to identify and highlight marginalised or diverse themes. The #OwnVoices tag has been used to recommend books about diverse characters written by authors from the same group as the main character(s). This is just one current example of a widely used term, and these terms can evolve or change very quickly. Because of their volatility, such terms or phrases should be used with care, but can be associated with the contributor (with their consent) and if appropriate can be included in descriptive text fields such as a biography or contributor description, marketing text, audience description and especially in the keywords field.

Keywords are sent in ONIX as a list of terms separated by semi-colons. Keywords should be carefully curated and should not repeat words that are already elsewhere in the structured metadata. It is inadvisable to make the list too long: a shorter, well-curated list of appropriate words and phrases is more useful to data receivers and is more likely to be used than a long list of every possible synonym or trending term. Shorter lists are also easier to update with newer terms or phrases.

```
<Subject>
  <SubjectSchemeIdentifier>20</SubjectSchemeIdentifier>
  <SubjectHeadingText>Own Voices; Diverse voices; New writings; lived experience; life
writing; Afro-Latinx; Afro-Cuban; BIPOC; urban settings; intersectionality; cross-cultural
experience; cultural clashes</SubjectHeadingText>
</Subject>
```

There's also an option – little-used so far – to send keywords that are specifically *not* meant for public display, using code B2 instead of code 20 from [list 27](#). Even though code 20 keywords are not usually displayed anyway, this option is to allow for sending words that might be searched for would but would not make sense – or might even be perceived as offensive – on a public display.

Along with the #OwnVoices tag often used for authors, is the notion of Own Voices Reviews – identifying reviews written by people from that same specific group, and an additional key selling point for works published and falling under this definition. It increases the range and diversity of reactions to a book by including Own Voices Reviews along with other reviewers.

To highlight reviews that are sent in an ONIX file, there is a short descriptive option that can be included to give extra information about the source of the review and highlight where these reviews reflect an aspect of diversity.

If a review is sent in the `<TextContent>` tag, then there is an option to add `<TextSourceDescription>` which allows you to add a short headline description of the reviewer where the notion of Own Voices Review could be added. The same can be done for `<CitedContent>` reviews using `<CitationNote>`.

```
<TextContent>
  <TextType>06</TextType>
  <ContentAudience>00</ContentAudience>
  <Text textformat="05"><p>'The writing is elegant and surprisingly humorous, and I found it very easy to relate to the characters as my own experience growing up as the child of Afro-Cuban immigrants was very similar. #OwnVoicesReviews.'

```

Q.7 Are we making the most of the possibilities in ONIX to send out marketing material to appeal to a diverse audience?

An important aspect of making diverse or marginalized voices more visible is making sure they are discoverable by a *mainstream* audience, and this is an important role of the marketing material¹³.

ONIX 3.0 already has numerous options to send different marketing materials to different audiences. It is important that publishers include a wide range of marketing material in their ONIX files to make sure this gets the broadest diffusion possible.

List	Code	Heading	?
154		Content audience...	*
154	00	Unrestricted	*
154	01	Restricted	*
154	02	Booktrade	*
154	03	End-customers	
154	04	Librarians	
154	05	Teachers	
154	06	Students	
154	07	Press	*
154	08	Shopping comparison service	*
154	09	Search engine index	*
154	10	Bloggers	*

Block 2 in ONIX 3.0 allows you to send various text in the ONIX file itself, to include links to cited resources from third parties, or links to supporting resources. The distinct audiences – the book trade itself, the press, librarians, educators, readers – are addressed using the code [list 154](#) and the `<ContentAudience>`

¹³ *Rethinking 'Diversity' in Publishing* is an interesting report discussing ideas around marketing diverse authors. It can be found here: <https://www.spreadtheword.org.uk/projects/rethinking-diversity/>

tag. The different texts that can be sent in ONIX ([see list 153](#)) can include marketing text aimed at non-traditional channels such as bloggers and influencers that may reach audiences who are looking for more diverse authors. This list also gives you the option of sending descriptive text that is not intended for display to anyone, but which targets automated search engines to highlight diverse works and voices online.

There is the potential to associate specific marketing texts with specific territories, so you can use wording specific to a particular region. For example, you could include different textual descriptions for the US market, the Canadian market, the European market *etc.* You could include text that is destined for booksellers, for example, that highlights some of the key selling points around diversity questions as applied to a particular country.

NB if you do not want this text to be displayed widely, check with your data receivers that they understand and use `<ContentAudience>` correctly.

Q.8 Do you think information about literary prizes or awards that the author has won or been nominated for are useful in the context of diversity and inclusion?

Yes, literary prize information is very powerful. It's only the major prizes that are commonly seen in marketing text, but ONIX has two data structures specifically for prize information associated with an individual work or more generally with a contributor.

These days, there are many prizes awarded to writers from diverse backgrounds, some international and some associated with specific countries, cultural groups, diversity topics – and they are intended to be powerful marketing tools for diverse and marginalised voices. Prize information is important to libraries, booksellers, educators – and to potential readers. It's valuable for publishers to include all prize information in their ONIX files using the `<Prize>` composite, so that downstream partners can make use of this data. Sending this as structured information makes it easier for others to use the information on websites. As with all structured data, having this information included in the `<Prize>` composite in ONIX also makes it more discoverable by search engines and voice searches.

```
<Prize>
  <PrizeName>Coretta Scott King Award</PrizeName>
  <PrizeYear>2017</PrizeYear>
  <PrizeCountry>US</PrizeCountry>
  <PrizeCode>01</PrizeCode>      <!-- Winner -->
  <PrizeStatement>Presented by the Ethnic and Multicultural Information Exchange Round
Table, part of the American Library Association</PrizeStatement>
</Prize>
```

Q.9 We are a children's publisher which publishes illustrated books that reflect the reality of children in diverse communities. Can Thema and ONIX help us to give more information about our illustrated titles?

In *Thema*, there's a category **YXP – Children's / Teenage personal and social topics: diversity and inclusion**, which has the note 'Use for: books that deal with these topics and stories with a particularly diverse cast of characters, or which illustrate inclusivity within the context of the story without necessarily being the subject of the story'. This category allows a publisher of titles aimed at children or teenagers to highlight works that *exemplify* diversity and inclusion – rather than heavily featuring diversity and inclusion as a topic – and that includes with the illustrations in picture books. It's important for all children to see illustrations they can relate to, and that show them what a diverse world they live in. This could be

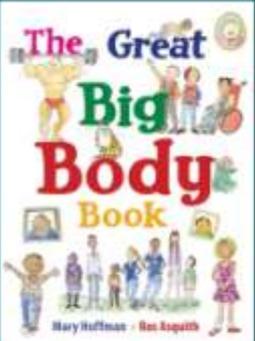
illustrations with diverse children, or maybe illustrations that feature inner-urban settings that would be more relatable for children living in cities. Using this category allows booksellers to make more detailed searches.

In ONIX, it's also easy to *describe* the illustrations, giving the maximum amount of information about the style and type of the images. This is usually accompanied by at least a couple of sample pages that show the type of illustrations. Some descriptive metadata should be included with the image file as well. However, when booksellers, educators, librarians, parents or readers are looking for relevant books they'll often be relying on text-based search. For example, a school in a socio-economically mixed area of a big city may want to find books that its pupils can relate directly to, with images that include settings that the children will recognise. ONIX allows you to give information about illustrations, type, number *etc*, and this includes a description. This can be sent using `<AncillaryContentDescription>` or `<IllustrationsNote>`, depending how you send other information about your illustrations, for example:

```
<IllustrationsNote>Includes 36 full-page colour illustrations, with various urban settings, including buildings, parks and streets, plus a diverse and inclusive range of children of mixed body types, backgrounds, and abilities are featured in the illustrations.</IllustrationsNote>
```

The main descriptive text describing this title (the 'long description') can also include details of the illustrations but using the note above allows for targeted searches to be made specifically about illustration.

Example 6: The Great Big Body Book by Mary Hoffman and Ros Asquith (Frances Lincoln)



```
<IllustrationsNote textformat="05"><p>Includes 36 full-page colour cartoon-style illustrations, depicting variety of perfectly believable bodies of all shapes, sizes, skin tones, moods, clothing , activities, and degrees of mobility.</p></IllustrationsNote>
```

```
<AudienceDescription textformat="05"><p>Intended for a broad audience, suitable for parents or schools use. Good for classes with diverse pupils, good resource in libraries, good title for general public.</p></AudienceDescription>
```

```
<TextContent>
  <TextType>02</TextType> <!-- Short description -->
  <ContentAudience>02</ContentAudience> <!-- Booktrade -->
  <Text textformat="05"><p>Hoffman and Asquith explore various questions and more as they build on their <cite>Great Big Book</cite> series with this celebration of the human body.</p><p>Their successful formula is honest, detailed and fact-filled, yet humorous, accessible and thought-provoking. The lively cast of characters is about as inclusive as you can get – hearing aids, glasses, birthmarks, walking frames, wheelchairs and sign language all appear in a flawlessly casual and convincing manner.</p><p>The book also touches subtly but positively on other facets of diversity, including transgender issues and same-sex parents. Meanwhile, Asquith's delightful cartoons and asides ensure plenty of laughs along the way.</p></Text>
</TextContent>
```

This title aimed at children is a good example of a book that is about a particular topic, but which incidentally features a highly diverse range of characters, illustrations and situations presented in a very inclusive way. So, the ONIX should include a detailed description of the illustrations, as well as a description of the potential audience and a description aimed at the book trade.

Q. 10 So what are some of the steps we can take next?

- If you're a publisher producing metadata, look at how you use *Thema* categories and qualifiers internally, and how aware your staff are of the full potential of using *Thema*. Are your editorial and marketing staff aware of how important the metadata is to the discoverability and sales of diverse titles? Check your metadata workflow: where is the information coming from? Are you making full use of the potential of your ONIX feed to transmit information about diversity, inclusion and the books that represent the diverse range of author voices and reader interests? Can you store and add to your ONIX feed all the relevant information about your titles and authors? Talk to your trade partners, let them know what you are doing, what kind of information you're sending them, and how they could use it.
- If you're a wholesaler or data aggregator, are you collecting all the information that publishers send you? Examine whether and how you make this information available to your customers.
- If you're a bookseller, get to know the *Thema* categories and qualifiers that are important for you, start asking your trade partners how they are using and delivering *Thema* in their metadata. How is other information about titles shared with you? Are you making full use of all the potentially relevant pieces of information that can be sent to you in an ONIX file? And how does your own online or in-store merchandising map to *Thema* categories and qualifiers?
- Are you talking to your trade partners about metadata requirements? Communication with your trade partners is critical when deciding to add new fields to your data feeds or if you want to receive new data fields.
- Download the annex to this document which has more examples.¹⁴

Chris Saynor
EDITEUR
26th June 2020

¹⁴ Annex to 'Diversity and inclusion' - <https://www.editeur.org/151/Thema-v1.4/#Documentation>