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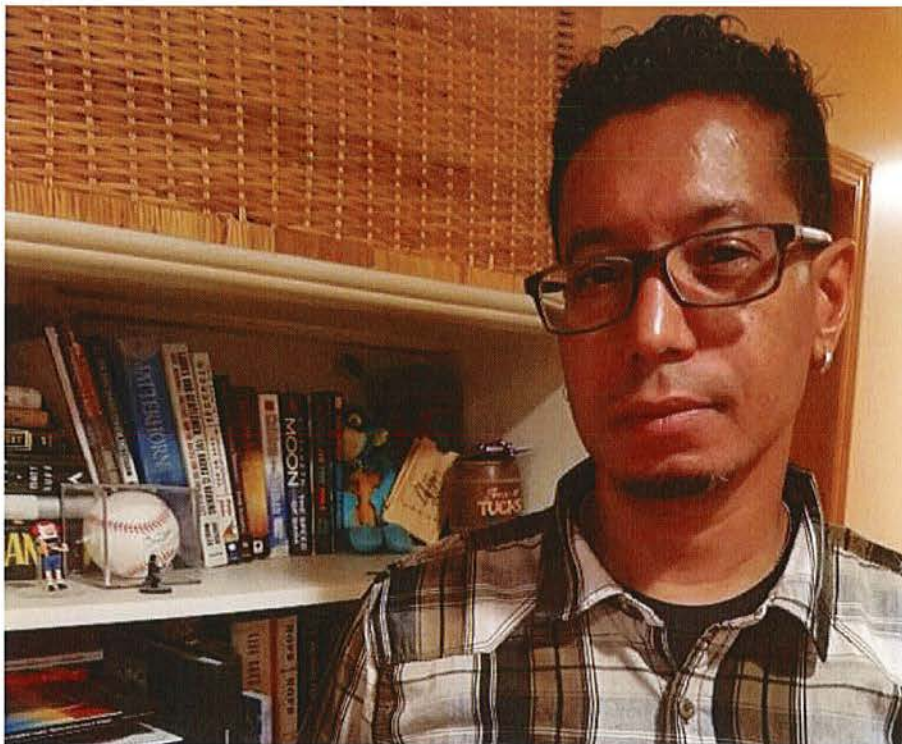
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Why It's Time to Quantify the Library's Role in the Reading Marketplace

Guy LeCharles Gonzalez argues that everyone would benefit from a collaborative, good-faith, and transparent effort to effectively measure the impact of libraries on book discovery, author brand development, and consumer sales

by Guy LeCharles Gonzalez | Dec 13, 2019

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Guy LeCharles Gonzalez

"If you're a writer and you have the impulse to put down on paper something that will survive you, you are inextricably connected to what a library means." □—Susan Orlean

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Practically every modern author's origin story includes a cherished memory of a library. Few question the public library's value as an important discovery channel, both in print and digital, especially in the thousands of communities across the United States without local booksellers.

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The same is true for publishers. Publishers depend on library preorders to help establish initial print runs ahead of publication. And once books are published, library-hosted author events and community reading campaigns have been shown to drive consumer sales. Many publishers even have full-time staff dedicated to marketing their books directly to librarians.

There is no question that public librarians themselves are unparalleled, often unheralded influencers, helping readers to discover books and authors through a plethora of in-

person and online readers' advisory services, regardless of publication date or bestseller list status. And yet, despite all these tangible, measurable activities and a well of consumer research that consistently shows library patrons are also book buyers, there are still some publishers who continue to view library lending, in any format, with a cynical eye. Why?

Most stakeholders would agree: better data about the library's role in the reading marketplace would be enormously useful. True, the inherent complexity of aggregating and analyzing the many sources of data needed to measure the impact of libraries is challenging—there's data from publishers and wholesalers, booksellers and libraries, and various industry organizations with overlapping and sometimes competing agendas. And there is the ever-present silent elephant in every room: Amazon.

But the challenge is by no means insurmountable, if only publishers were to deem it a priority.

Knowable Unknowns

"Not everything that can be counted counts, and not everything that counts can be counted."—William Bruce Cameron

Big Five publisher Macmillan has been at the center of controversy recently, following its new restrictions on public library access to new release e-books. These new restrictive terms were reportedly driven by internal data from an experiment with a set of titles from its Tor sci-fi/fantasy imprint, and based upon CEO John Sargent's belief that the lack of friction in library e-book lending is causing book-buying customers to "change habits."

Steve Potash, CEO of OverDrive, the leading supplier of e-books to public libraries, has publicly disputed Sargent's data and analysis on the impact of library e-books. "For all the Macmillan e-books that libraries acquired for lending, 79% expired and were removed from library catalogs because the two-year term limit occurred first," Potash pointed out in a recent blog post, "not because they were checked out 52 times." In fact, OverDrive's data, he added, suggests that the average Macmillan title is checked out just eight and a half times during a two-year license.

It's rare to see a vendor so publicly challenge a key partner. But the belief that library availability cannibalizes consumer book sales is a persistent, unproven conclusion with no public data to support it. And the underlying premise that library patrons borrow books or e-books they would otherwise purchase suggests a fundamental misunderstanding about the various ways patrons use libraries today.

Is it possible that library e-book lending really is so easy nowadays that it's negatively impacting Macmillan's consumer sales? Sure, it's possible. But viewed in context, it's more likely that other factors are having a bigger impact on Macmillan's e-book sales: for example, high consumer prices, especially for bestsellers and new releases; competition from other traditional publishers; competition from self-published authors (often at significantly lower price points); and the ever-increasing competition for a consumer's time and money from other forms of immersive media, such as audiobooks, podcasts, streaming TV, and gaming.

Rather than making strategic business decisions based on limited data and unsupported claims, why not uncover what's really happening? I believe that three of the biggest known unknowns about libraries are entirely knowable, if only there was a collective will to start shedding a productive light on them:

1. How much of public libraries' estimated \$1.5 billion materials budget goes toward trade publishing's estimated \$12 billion in projected revenue for 2019, and where does that rank against other channels?



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2. How much marketing value do public libraries create for publishers through readers' advisory services, physical shelf and online catalogue visibility, hosted author events, and community book clubs?
3. How do library patrons discover and acquire the books they read and in which formats, and how does that fit with other media consumption and buying habits?

If industry leaders accept NPD BookScan's stated 80%–85% coverage of the retail market and the AAP's oft-revised, self-reported StatShot data as useful data points to measure the health of the trade publishing industry, then establishing libraries' direct revenue contributions to the industry is absolutely a knowable unknown.

If publishers can accept that ARCs, social media, professional and reader reviews, co-op promotions, and paid advertising are all valuable marketing tools for publishers that are worthy of investment, then measuring the value of libraries' organic, community-centric efforts in those areas is absolutely a knowable unknown.

And, if we accept that books and reading exist within a broader multimedia ecosystem, then a better understanding of the consumption and buying habits of library patrons is absolutely a knowable unknown.

Facts Matter

"You may hate gravity, but gravity doesn't care." —Clayton M. Christensen

Data isn't a panacea, of course. The fact that two contradictory perspectives can be sparked by similar data illustrates one of the important limitations of data: without proper context, it can be used to prove whatever you want it to. As in the early days of GPS navigation systems, reliance on data will drive you off a cliff if you're not also paying close attention to your surroundings.

It is time for the publishing industry to put some teeth behind its oft-professed love for libraries, lest we find ourselves driving the industry off a cliff. It's time for a collaborative, good-faith, transparent effort to effectively measure the impact of libraries on book discovery, author brand development, and consumer sales.

Whether that's through the Panorama Project, BISG, ALA, ABA, some combination thereof, or something completely new, it is in everyone's best interests to demystify the role of public libraries in the book business, print and digital, with the explicit goal of identifying the ways publishers and libraries can effectively support their common mission and continue to deliver mutually beneficial outcomes.

Guy LeCharles Gonzalez is project lead for the Panorama Project, a research initiative guided by representatives from the ALA, the Audio Publishers Association, the Cuyahoga County Public Library, Ingram Content Group, NISO, Open Road Media, Penguin Random House, Rakuten OverDrive, and Sourcebooks.

A version of this article appeared in the 12/16/2019 issue of *Publishers Weekly* under the headline: Data Points

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