



The Current Bookmarket

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THE PUBLISHING of books is a six-hundred-million-dollar-a-year industry in the United States. On the American business scene, it is one of the lesser giants, a giant whose vagaries have often baffled librarians, and whose recurrent cries of anguish have given them much concern. New books, and new editions of older books, flow from the presses in a never-ending and again-rising stream: 12,050 titles in 1953, surpassing the industry's previous peak in 1940 when 11,328 new books appeared, and nearly doubling the figure reported in the trough-year 1945 when only 6,548 new titles or new editions were published.¹ It is from this stream, augmented by the publishing output of foreign countries, that libraries of all kinds and sizes must select whatever new books are needed in their service programs, and then to acquire them by whatever means experience has proved most expedient and economical.

For some libraries, the new-book stream is almost the sole focus of selection, while for others a major portion of available book funds is earmarked for out-of-print materials. All libraries, however, are concerned in one degree or another with the acquisition of books currently in print. This article describes the industry upon which libraries depend for books-in-print, and reports a survey of methods used by libraries in acquiring them.

In book-publishing, as in many other industries, a relatively small number of firms dominates the field. In 1953 the Big Four—Doubleday, Macmillan, McGraw-Hill, and Harper—added 1,297 titles to their already large lists, nearly 11% of the entire number brought out by the 332 firms publishing at least five books during the year. Clustering around these four are twenty-five other companies which published more than a hundred books each and, together, accounted for slightly more than one-fourth of the year's total. Broadening the circle to include thirty-two firms which brought out between fifty and one hundred books during the year, one finds that 18% of the publishers issued 56% of the books appearing in 1953.¹

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The postwar years, during which the annual production of new books or editions has risen more than 80%, have witnessed the phenomenal rise of a group of publishers whose sights are frankly trained upon mass markets. By 1953 nine of these firms had so successfully expanded their publishing and marketing of inexpensive paper-bound books that they were securely within the circle of large publishers. A total of 984 books was published by these nine firms and seven others whose lists have not yet reached the fifty-or-more-a-year mark. An estimated 270 million copies² of their paper-covered books were sold in 1952, 35% of the 766-million copies-total for the year, but only 8% of the dollar-value total.

Like earlier threats to the economic health of book-publishing, paper-bound book-production has not toppled the industry. While sales of paper-bound books increased nearly threefold from 1947 to 1952, sales in all other broad categories increased also (e.g., trade books, 46%; textbooks, 2%; technical and professional books, 35%).² As a kind of hedge, some of the old-line companies have actually strengthened their positions by establishing subsidiary firms to produce inexpensive lines of paper-books, or by tailoring their current lists to appeal more strongly to the reprint segment of the industry.

This trimming of sails is reminiscent of what happened during the years when the meteoric development of book clubs filled the book-trade with dark forebodings. To meet the threat embodied in skyrocketing subscriber-lists and club-distribution, publishers increasingly selected for publication manuscripts which would appeal to the editorial boards of the larger book clubs and which, if selected, would bring in additional revenue in the form of book-club royalties.

While publishers were and apparently still are able to accommodate themselves to the proliferation of book clubs, local booksellers have been so seriously affected that they probably take small comfort in the fact that book distribution by clubs has declined from 54 million copies in 1947 to 48 million in 1952.² Book-club distribution and the rise of the paper-bound book form negligible factors in library acquisitions programs, but librarians are nonetheless concerned with them as trends affecting the book industry's moral as well as economic health.

It is quite obvious that publishers must not only make ends meet, but must make a profit from their endeavors. However, despite rising production costs, publishers have been understandably reluctant to increase too rapidly the prices of their books. Experience has taught

them how precarious their market is. Hence *average* book prices in 1953, as compared with those in 1941, show increases of only 28% for novels, 41% for biographies, and 55% for historical works,³ whereas prices for other products have risen 80–100% over the same period.

Only by embracing expedients that would ensure additional revenues have publishers been able to keep book prices from rising too steeply. Royalties from reprinters, book clubs and, perhaps more significantly, from movie producers, have helped keep publishers solvent. The influence exerted by these groups upon the selection of manuscripts for publication, however, is of questionable virtue. It seems almost certain that, with the editorial environment more surcharged than formerly with the economics of publishing, a relatively greater number of manuscripts worthy of publication have been rejected. The rising birth-rate of university presses and of one-man scholarly presses with their expanding lists afford some small solace to librarians and others who deplore the diminishing incidence of the more scholarly type of book on trade publishers' lists, but it is recognized that the activities of these presses also are circumscribed by economic considerations.

In general, the channels through which current books are acquired by individuals or by libraries are relatively uncomplicated, but almost any acquisitions librarian can cite a myriad instances in which books currently in print were acquired only with extreme difficulty. It is often the case that a book can be purchased only from its author, or that a severely limited number of outlets are being utilized in the book's distribution. In such cases, librarians are often thwarted in their efforts to identify sources of availability, but for the majority of books-in-print sources are easily ascertainable, and accumulated experience enables librarians to select the right one for each title.

The publishers themselves are of course at the top of the distribution pyramid. Some of them operate their own printing establishments, while others have their printing done by separate firms. Some of them have their own binderies, but most of them have specialized binding houses do their work. The finished product is delivered either directly to the publisher's establishment or, in the case of some of the larger firms, to one or more strategically located warehouses or distribution points. The bulk of sales for any newly-published book is made to wholesale jobbers and to local bookstores. Not all of the latter group deal with publishers directly; many prefer to acquire their stocks from jobbers, who can give them discounts comparable to those the publisher allows, and whose service is often swifter and more satisfactory.

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An individual book-buyer more often than not makes his purchases at a local bookstore, or in one of the many book outlets which are operated in conjunction with the sale of other, often seemingly unrelated, products. Many individuals secure their books by the mail-order route, particularly if the towns they live in or near do not have bookstores. It is unfortunate that this kind of situation exists in so many places, and wholly understandable that some of the more enterprising publishers have resorted to mail-order advertising or direct circularizing, even though this distribution tactic has involved them in bitter controversy with booksellers.

Libraries can utilize at least three alternative sources in acquiring books-in-print. They may place their orders with local bookstores if adequate stocks are maintained and satisfactory discounts offered. Some public librarians, or their boards of trustees, consider it good public relations to buy locally, even though they might more judiciously spend their limited book funds with jobbers. Occasionally a college or university bookstore's operations are large enough to include the campus library's orders for current books. One of few such campus bookstores known to the writer is the Columbia University Bookstore, from which a majority of Columbia University Libraries' purchases of current titles is acquired on quite advantageous terms.

Orders may also be placed directly with publishers, but unless the library regularly buys multiple copies of single titles, or single copies of many titles from individual publishers, the latter often prefer not to handle the orders. The large public library with many branches may find it advantageous to place the bulk of its orders directly with publishers, but a small college library, on the other hand, may find it uneconomical and unsatisfactory to do so. Many such libraries, however, probably find it expedient, as do larger libraries, to place blanket orders for all books published by certain of the university presses or "specialty" publishers.

The third major alternative is to place the majority of orders for current books with wholesale book jobbers. The larger jobbers build up tremendous inventories, carrying in stock not only books recently published but also backlist items for which there remains some demand; the same can be said of some of the smaller regional jobbers. Some jobbers develop specialties, e.g., medical and technical books, or university press books. Libraries served by these jobbers can be reasonably certain of receiving prompt delivery on most books they order, and of receiving prompt reports on books not immediately available. The assertion about reporting probably applies more accurately

to the medium-sized jobber than to the larger companies. It would appear that the service aspects of book-jobbing do not always keep pace with an acceleration in sales volume.

In shaping their buying policies, librarians may choose to direct orders for books-in-print to one type of source exclusively, or they may elect to employ all three types, with equal or varying emphases. In general, decisions are based upon such considerations as (1) where can we buy most cheaply? (2) what sources make possible a greater simplification of our internal purchasing procedure? and (3) from what sources can we get promptest service? The last-named factor often outweighs the other two, but in most libraries the price and efficiency factors outrank the third most of the time.

In an attempt to discover existing patterns of buying, the writer mailed a short questionnaire last summer to thirty-one public libraries and sixty-four college or university libraries. Both small and large libraries were included on the mailing list, and care was exercised to include all regions of the United States in the sample. Librarians were asked to estimate, or to discover by close analysis, what proportion of their orders for books-in-print were placed directly with publishers, with jobbers, or with local bookstores. They were asked also to specify the reasons underlying the particular policies adopted in their libraries.

The responses of twenty-five public and forty-two college or university librarians make possible certain generalizations, the first of which is that the buying practices of no two respondent libraries are identical. Differences in collecting policy, correlative differences in requirements of clientele, and differing experiences in dealing with jobbers, publishers and bookstores account in large measure for this unsurprising observation. However, similarities in buying practice are strong enough to permit grouping the respondent libraries into four categories: (1) Those which purchase 65% or more (in some cases, as much as 95%) of their current books from jobbers, and divide the remainder of their buying between publishers and bookstores, in that order; (2) Those which purchase 65% or more directly from publishers, and split the rest between jobbers and bookstores; (3) Those which divide their purchases nearly half-and-half between jobbers and publishers; and (4) Those few which place the majority of their orders with local bookstores. The distribution of these groups, for the sixty-seven libraries participating in the survey, is shown in the following table:

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TABLE I
Book Buying Distribution

Buying-Pattern Category	Academic Libraries (%)	Public Libraries (%)	TOTAL (%)
From jobbers, 65% or more; 35% or less from publishers and/or bookstores	52	84	64
From publishers, 65% or more; 35% or less from jobbers and/or bookstores	14	0	9
From jobbers and publishers, 35%-65% each	29	8	21
From bookstores, 65% or more; 35% or less from jobbers and/or publishers	5	8	6
Total (N = 100%)	42	25	67

If the respondent libraries comprise a representative sample of libraries in the U. S. (and no such claim is made for them), it can be asserted (1) that both public and academic libraries tend to place the majority of their current book orders with jobbers, (2) that academic libraries place more orders directly with publishers than do public libraries, and (3) that neither public nor academic libraries purchase many books from local bookstores.

In earlier years, many public libraries utilized the services of bookstores, but it would appear that as acquisitions programs have grown, local booksellers have been unable adequately to meet libraries' requirements. Similarly, except on very large campuses, university bookstores are totally unable to fulfill the specialized needs of university libraries. With further reference to local bookstores, it is worth noting here that in later articles in this issue both Henderson and Mrs. Spain point to the problem faced by small libraries in areas lacking adequate bookstores. Since, as Henderson adds, book reviews are often unsatisfactory, these isolated libraries have considerable difficulty in selecting and acquiring current books. Furthermore the death rate among retail book outlets is apparently high. It is understood, of course, that this whole question of inadequate local bookstores presents a large economic and social problem throughout the country, a problem that disturbs publishers, booksellers and librarians.

A few of the respondent public libraries place as many as 50% of their orders directly with publishers, but among the academic libraries there are some (14%) which purchase two-thirds or more directly from publishers and a larger proportion (29%) that buy about half their books-in-print directly. This difference in buying practice can prob-

ably be explained chiefly in terms of the greater premium often placed on speedy procurement by academic libraries. When a professor discovers the library's lack of a book urgently needed for research currently underway, or when, two weeks or less before the semester begins, an instructor requests multiple copies of a book he wants placed on reserve, the library usually makes all-out efforts to procure the materials speedily, and in most cases a "rush" order to the publisher is the most effective method.

In a majority of both public and academic libraries it has apparently been found advantageous to buy chiefly from wholesale book-jobbers, but this conviction appears to be more prevalent among public libraries. Only slightly over half the academic libraries in the survey reported placing 65% or more of their current orders with jobbers, but over four-fifths of the public libraries do so.

The most probable explanation of this difference lies in the more specialized nature of the collecting programs of larger libraries, particularly those serving universities in which research activities are well developed. These programs involve procurement of many publications (e.g., those published by societies) which are not readily procurable through book-jobbers, either because the publishing agency cannot afford to allow the jobber the discount he expects and receives from trade publishers, or because the jobber himself is unwilling to handle items which are difficult to secure. If the volume of orders placed with him is large, it is often the case that, solely as a matter of courtesy and accommodation, a jobber will handle the hard-to-get items, but the small and medium-sized library is usually forced back upon the expedient of ordering directly from the publishing agency. Although smaller libraries may receive assurances from their jobbers that they will attempt to supply any currently available item, placing orders for the hard-to-get items is often followed by dismaying delays and fruitless correspondence which increase the ultimate cost of these items to the library.

The reasons given by librarians for placing most of their orders for current books with jobbers are varied and illuminating. Discounts allowed by jobbers, they claim, are as good as, and in many instances better than, those allowed by publishers. Some librarians cite contractual agreements with jobbers, under the terms of which favorable discount schedules apply throughout the year and rebates are granted if the total purchases exceed a specified amount. Many jobbers pay all transportation charges, and for some libraries this item alone represents considerable savings.

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Another side of the coin which puts jobbers in a favored position is that libraries can effect internal economies by dealing with one or two jobbers instead of ordering directly from a large number of publishers. One of the public librarians participating in the survey asserts, "We have found that purchasing direct from publishers creates a tremendous amount of paper work, check writing, etc., which more than eats up the differential in discounts offered by jobber and publisher. It is a question of total economy in the long run." It should be fairly obvious that by consolidating orders, savings are effected not only in the initial process of writing orders, but also in the checking of shipments and the processing of invoices for payment. Furthermore, to quote an acquisitions librarian in a large university, "We find [ordering through jobbers] more satisfactory than from publisher direct as it gives us a greater uniformity in type of invoice." As will be immediately obvious, this factor can operate to save the time of acquisitions librarians for more productive endeavor.

Librarians testify also that better service is usually given them by jobbers than by publishers. Books are supplied more promptly; invoices are rendered speedily and more accurately, with billing procedures modified to fit requirements that must often be imposed by libraries; reports on books whose delivery must be deferred or cancelled are submitted more promptly and consistently; claims are expeditiously handled, and adjustments readily made for returned duplicate, damaged or defective copies.

The relative proximity of their jobbers was cited by some librarians as another favorable service factor. It is known, however, that distance often adversely affects the volume of orders placed with jobbers. Most of the libraries which reported splitting their current orders about half-and-half between jobbers and publishers are located at considerable distances from the larger book-distribution centers. It appears entirely likely that if libraries in Arizona, New Mexico, and Oregon, for example, were closer to such centers, they would divert a larger proportion of their orders to jobbers than they now do.

It should be noted that the foregoing observations apply primarily, and perhaps exclusively, to domestic book-buying. Several respondents pointed out that their estimates did not include the acquisition of books published in other countries, and it is not known whether other respondents likewise excluded them. It seems moderately safe, however, to assert that most libraries which place domestic orders chiefly with jobbers also order the bulk of their foreign books from jobbers, and also that libraries which order directly from publishers in this

country tend to use the services of a jobber (located either abroad or in the U.S.) in acquiring foreign publications. Participation in the Farmington Plan operation has undoubtedly helped many libraries in their selection of foreign agents and in their methods of foreign business. The writer's experience, coupled with responses made by some librarians in the survey, would seem to indicate the wisdom of a library's selecting a single dealer in each country from which books-in-print are desired, or acquiring such books through American firms which specialize in foreign publications. Service elements outweigh economic considerations in this buying area, because as a general rule there are no discounts, other than on pre-publication offers, on books published in foreign countries. The recency and excellence of John Fall's discussion of procuring foreign publications makes any further observation unnecessary here.⁴

Never more true than now is the old saying, "Of making many books there is no end." New books appear in this country at the rate of about 230 each week; in Great Britain at a weekly rate of 351;⁵ and in countries embraced by the Farmington Plan a combined total of 17,504 in 1952,⁶ or an average of 337 each week. Not all these books are candidates for acquisition in any one library, but their numbers provide a measure of the flood of print which libraries collectively attempt to assimilate. They yield also some notion of the problems that confront acquisitions librarians in procuring the books-in-print wanted in individual libraries. Solutions found to be satisfactory in one library may not prove so in another, but the survey findings reported in these pages reveal prevalent buying patterns which may be instructive as well as interesting to librarians who have found only partial cures for their current book-buying ills.

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