The Book, the Book Trade and the Future*

Martyn Goff

We are getting so accustomed, most of us, to living in a state of perpetual crisis that it is probably reducing our sensitivity to real crisis. This certainly applies on the political and economic fronts. And so if tonight I start by presenting you with a state of crisis, I hope that the recurrent state of the pound and/or the unions and/or the Government won't lead you to believe: O Lord, here's another one of them. But I do think for a number of reasons, and hope to show you, that the book trade—with which after all you are very concerned indeed—and the whole of the book world is facing a crisis, some of which, but only some of which, derives from the other crises to which we have to pay such attention daily in our newspapers and on television. It is clear that, as at the moment there is less money available for anything, there will be less money available for books. Most of you are aware probably of the startling cuts made by certain library authorities, and of these Buckinghamshire and Surrey are the obvious ones—they are authorities who cut out, in one case a great deal of their school library service, in the other a large amount if not all of their fiction and children's book-buying at least for a year. We must not exaggerate this. It isn't every library authority that is doing it, and in fact some public library authorities across the country are even spending more money this year than they spent last. But the chances are, when the axes start to fall, books are an easy thing on which to bring them down. It's obvious, isn't it, if you bring your axe down on a teacher or a librarian, quite reasonably he'll squeal or she'll squeal, but if you bring it down on a book, the poor thing doesn't do anything at all. This, I'm afraid, is true. So the chances are, we are likely to see a considerable reduction in the public buying of the units of books—notice how I put it—I'm not claiming to you that we shall see necessarily a large reduction in public expenditure. I think Buckinghamshire and Surrey are exceptional. But I think fewer books qua books will be bought, and fewer books qua books will be published. Book prices, as we all know, have advanced pretty rapidly in the last year or two. As a regular fiction reviewer in *The Daily Telegraph*, I'm aghast when I go to the 'Telegraph' and pick up my five books, and some of them have 160 pages and cost £3.50; for 180 pages they will cost £3.95. I'm the victim here of what we're all victims of, which is: the wrong perspective. But the perspective exists. I mean wrong perspective because the book in price has gone up no more than the butter, or the clothes we wear, or the petrol, or anything else. It is merely that we—and by we I'm talking, if I may for a moment, of Britons and shan't bother myself about differentiating Scotsmen from Englishmen or Irishmen or Welshmen—have always tended to regard books as a fringe item; and we have to take this into account so that when prices go up, we grumble and pay the price for butter, we grumble and pay the price for blouses or shirts, but books we balk at; £3.95, we say, for 180 pages! So that on the one hand most books are going to be bought in units in the public sector; on the other hand this is going to affect the private sector as well: because fewer books will be published, partly due to price resistance by the public, partly to the lessening in purchasing by public authorities.

Now this is something which, I'm going to suggest to you, is a crisis not least to every one of you. It's a crisis to every one of you because the laws of economics as applied to the world of books are such that the bad are likely to drive out the good. You know, and I know, that when publishers start reducing the number of titles—it looks as though this year for the first time, that regular 33, 34, 35 thousand titles a year that we've seen for the last five or six years are probably

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going to drop; it’s a bit difficult to say by how much yet, but to a 27-28,000 mark which is a very considerable drop indeed. It looks as though, when that happens, it is not, need I say, the Alistair Maclean that’s going to be dropped; it’s not the Agathie Christie; it’s not the eighth Alistair Maclean that’s going to be dropped; when that happens, it is not, need I say, the considerable drop indeed. It looks as though, going to drop; it’s a bit difficult to say by how much.

And this crisis is aided by a number of movements that have little to do necessarily with the shortage of money. This crisis is for instance assisted by the fact that we are seeing a change in the use of books within schools. There is a tendency to move away, unless Mr. Callaghan and his new outcry stops it, from the set book, from the purchase of a large number of books for one class, to spreading the idea of reading on to a number of books, which will probably result in a total lesser number of books being bought. And we are seeing a similar thing in the changed syllabuses in universities, where the more rigid disciplines of five, ten, and twenty years ago are being abandoned in favour of something far freer-ranging, which means that a very small number of students are doing a given course, which in turn means very few copies are being ordered of a given book, and this too is presenting the publisher with the problem: is it worth printing and publishing an edition of 300? The answer is: unlikely, or, no.

So, for all these reasons, I start tonight by saying to you that the chances are that we are going to see a time of increasing worry for those of us who care about books, not so much in terms of best-sellers but in terms of books that really matter. And I think it’s only fair to say here that this is going to have an effect not only on the production of books but on the way they are marketed and distributed. I would have a bet, Sir, that when I’ve finished talking, a number of people—except I hope I’m forestalling them—are about to say to me: Mr. Goff, can you tell us why it is it takes us three or four weeks to get a book, and we only live fifteen miles from London? I would say that this is a general experience everywhere. It’s therefore fair to go on to say that some, but not much, of the fault in the distribution, is due to the bookshops. Nearly all is due to the publishers, and I’ll come back to that in a minute. But, and this is the point I want to make, I wonder if it has occurred to you that one in four bookshops in England at this moment are making an actual loss every year. One in four! My figures come from the charter survey for last year, but from all I know, this year is going to present a worse not a better picture.

Not only that, we are very—if you’ll forgive the verb—we are very under-bookshopped. There are 400 bookshops that we would term charter bookshops; and charter bookshops which exist in this country are a special group that have to fulfil special conditions, and they are on the whole our 350-400 best shops—there are about that number of them—and they have to fulfil certain conditions of size, stock, training, financial returns, and so on. We’ve only got about 400. There are 900 such bookshops in the Netherlands, with a population of thirteen million against our fifty-five. This is a fairly shattering thing. New Zealand has much better bookshops than we do. Vienna, a city of a mere two million, has infinitely better bookshops than anything that we’ve got in London. If I’m talking in large generalisations, it is because I want to paint a picture. But I assure you that if you get down to the hard details, the picture changes minimally, and really what I’m saying holds up. So that not only are things set pretty poor for the book, but they are set equally unfair for the bookshop. And I think this is very sad, because while I think it is a marvellous thing that Great Britain has what is either the best or the equal best—Sweden being the other one—public library system in the world; this doesn’t always replace the bookshop. The bookshop in a community has a different function from the library, and one that I believe can be just as important; and it would be very sad if we were to see the number of our bookshops falling further than they have, since we start fairly poorly. So that I hope I may be forgiven if I talk about the state of the book world at the moment being somewhat in a state of crisis; and I hope I’ve given enough examples to show that it really is in this sort of state.

There are of course other straws in the wind which we hope will lead us the other way; and if I may be forgiven for describing one or two experiments in which the National Book League is at present involved, because we hope that these will both lead in the opposite direction, it is so that I don’t paint a picture that is too black. The first, of course, is the establishment of the School Bookshop Association. You may have seen in The Guardian or elsewhere, depending on your interests, that on October the 11th, under the aegis of the NBL, the School Bookshop
Association was set up. There are something like four to five thousand school bookshops already operating in schools in this country. We hope that, with the coming of the School Bookshop Association, this number will be doubled and eventually trebled and quadrupled in the next three to five years. And there is no doubt at all that, if we are to persuade more people to read and more people to buy books, then we have twenty times the hope of success inside schools as we have anywhere else. On the whole the greatest chance of success with young people is up to the age of eleven; we all know that it gets much harder from eleven onwards for a variety of reasons. There arise many competing things and the older children are not quite so impressionable. By the time they get to eighteen or twenty it's jolly difficult indeed to persuade the non-reader and the non-habitual book buyer to start doing either—not impossible, but pretty difficult—whereas at younger ages both are very possible. If we can persuade large numbers of children to acquire the book-buying and reading habit, I've not the slightest doubt we will do something to alter the movement away from books in the context to which I'm referring.

The other experiment in which we are involved, and which you may have heard about, is something called Book Flood. This was an experiment which was started in New Zealand in 1971 when I was there, and which is now going to happen in this country at Bradford. It's interesting that Bradford, way up there in the north, has produced all sorts of things, from great music to David Hockney, and now the Book Flood experiment. The basis of this experiment, put in very few words, is that some of us believe that if you can flood a classroom with books—and I really almost mean that term—you will persuade a child to read who will never go along to the school library, who will never go, even if there is one, to the bookshop. The school library is right along the corridor—anyway it's only open between x and y hours; but if the books are there in the classroom on shelves, the chances are that the child will pick them up and look, and if the books are the sort of books that he or she wants to read, he may well borrow them, and take them home to read. This is precisely what happened in New Zealand. The figures are very impressive, not just of the improvement in children, over three years, in reading interest or reading ability, but in comprehension, imagination, and character development. Although the figures in some of those things were as high as 25% improvement, I must add in fairness that of the schools selected one had a very high percentage of deprived children. In Bradford we shall have about 15% of Pakistani children; in the schools that were used in New Zealand, the percentage of Maori or part-Maori children was very much higher. However, we do hope that, like the School Bookshop Association, here will be something else with which we can beat the Department of Education and Science into realising what can be done if a great number more books are made easily available to young people.

But of course it is not only the question of money or price that is affecting the whole slightly depressing situation of books. It is above all the things competing for time with books; and it's no good pretending otherwise. If you say to people, well, television competes for people's leisure time, the answer you nearly always get is: Good Lord, no, it actually increases book sales—haven't you heard about what it did for the Forsytes, for the Pallisers, for Poldark, and so on and so forth? Yes, of course I have. In fact, probably as well as anyone I know the exact figures in each case. But these are the exceptions which prove the rule. So are the books which television itself makes, like the Kenneth Clark Civilisation, or like the Bronowski. These are wonderful. It is marvellous how many copies of those books are sold. But they are not the answer, as we know from research that was done for us by Masius, Wynne-Williams. They are not the answer compared to the amount of time that is blotted up by television and television viewing. The amount of time that very young people spend—I'm talking of ages about three or four up to eleven or twelve—watching TV can be as much as forty-five and fifty hours a week, and there is precious little time left to read books if you are spending that amount of time. And it doesn't stop there, because when one talks about the competition for leisure time, if you look at the picture 100 years ago and now, it is vastly different. However much all of us may grumble that we haven't got a penny when we get to the end of the week, that we can't cope with our income tax, that we are underpaid, and so on, it remains true that we are in one sense enormously affluent. We have endless hobbies, from yachting to boating to motocycling to all sorts of things, none of which existed in the main 100 years ago. Of course people did go out in boats 100 years ago, and...
they did do some of the other things I've mentioned, but they were not done on the scale they are now—the scale on which the competing things, and they are competing in terms of those of us who believe that books have a very special place indeed in our society, are taking up more and more time. And so we must take this too into account. We must take it into account in the sense that we must be prepared, those of us—all of us certainly in this room—who believe in the book as a very special means of communication and/or enjoyment, entertainment, all sorts of things, and I'll come to some of its merits in a moment. But if we believe in it, we must be prepared to fight for a place for the book, because all the other things are being fought for pretty hard as well. The commercial interests in everything else are in many ways more direct. Books are always, aren't they, a slightly unfocussed subject in their promotion, because we don't believe that in certain cases they should have a very hard sell. We don't mind if Alistair Maclean has a hard sell, we don't mind if certain other books do, but we are dubious about this when it gets to a serious biography or a serious book. Yet those are the very books that, for reasons I shall come to, we wish to see having greater currency.

So, if I may set beside the rather dour picture I gave you of the situation of the book due to so much less money being available, I would like you to take into account that there is also less time available.

I've also already said that our bookshop spread in this country is comparatively poor. It's liable to get poorer. The reason for this is that where you get an increasing concentration on a small number of best-selling titles, these can more easily be marketed through other places than bookshops. Indeed, we are already seeing anything from supermarkets to department stores selling very large quantities of books. We are seeing Woolworths at the moment moving into books in a very big way; and I've no doubt a lot of other people will soon have that doubtful term, 'own brand'! We shall see children's books from all sorts of lists, and we will know that they are really Collins or Hodders or whatever, but they will have of course on them, 'Fine Fare' or 'Safeway' or some other 'own brand'. There is no doubt about that, but that is a movement too, and a movement which will undercut, of course, the bookshop. The bookshop must have some of the goodies, some of the best-sellers, at all levels if it is to keep going.

This is one of the reasons why the Net Book Agreement remains a keystone to the good stock-holding bookshop. If you take away the Net Book Agreement, you will take away the very thing which enables the stock-holding bookseller to exist, the fact that the large department store or supermarket can't undercut him on the bread-and-butter lines—things like the popular cookery book, the popular novel, or anything else. It is for that reason that I believe that the ending, as in Australia, of the Net Book Agreement would be extremely serious.

Well, that's a pretty grim picture, Sir, with which to start. Is it really bound to be as bad as I've made it? I will answer—as far as the pursed strings available for purchase, yes. I can't honestly see, and I'm not by any means a pessimist—I'm an optimist by nature—I can't by any means see a lot more Government money in any form being available for books in the next reasonable period, three to five years. Of book prices, I have more hopes. I believe we could be producing, in the technical sense, books more cheaply than we are at the moment. There are presses available in this country which are just beginning to produce books very much more cheaply than we have been seeing for some time. It's extraordinary, isn't it, just stop and think about it: we go to the moon, we can get that Concorde up and down week in and week out, and we can't do what is now a simple thing like producing a book for less money in a cheaper way. Look at the production of newspapers and magazines on web offset: how come we can't do this with books? Well, we can and we will. When we've gone through a certain amount of difficulties over the introduction of the right machines, some of which are beginning to arrive in this country, we shall see books coming out more cheaply. I think this is very important, because this will, we hope, reverse the trends that I've been mentioning. Some of you will have seen the Heinemann Octopus books that have come out recently with six books in one. I'm not sure that I personally want six Kafkas or six Orwells or even six Maughams when I want one, above all if it's to take to bed with me or to take to the beach; but they are quite remarkable value at £3.95, with super binding, beautifully printed, very white paper, and altogether very nicely produced. I don't know how many of you have seen them, but they are worth a look next time you are in a bookshop; and I don't even know yet, perhaps someone in the audience will tell me later, what librarians feel about them. But
they do show what can be done. If you can have 1,200 or 1,400 pages for £3.95, there is very little excuse for £3.95 for 180 pages. I know, of course, it’s not exactly the same thing, and that the quantities are different. But nevertheless, it does give us some hope that the trend of book prices is not necessarily irreversible.

It is true that the book trade has suddenly got hold of a number of splendid words that it loves to throw about. They include ‘professionalism’ and ‘marketing’; you probably know the key fashionable words as well as I do. A book was published a couple of weeks ago, which I reviewed for ‘Kaleidoscope’ on the BBC, called *Victorian novelists and their publishers*, published by the Athlone Press. It is a remarkable book because it shows that there was as much real marketing of books going on in the Victorian age as there is today, despite our feeling that without management consultants, computers and the like, we couldn’t possibly be professional enough to market anything. It’s quite remarkable there is in existence a letter from George Eliot’s husband to her publisher which provides a marketing strategy—you notice I’m using exactly the right terms—which would command respect by any of your most modern marketing people. There is very little doubt that there are not many new things around; it has only taken, it seems, a very long time before we get round to doing them. There are trends, again of which you may have heard, which may possibly accelerate the pace in this direction. You may have heard that the German firm of Bertelsmann are considering coming into this country. Bertelsmann in Germany turn over just short of £400 million a year—that’s one publisher! Now when I tell you that figure is larger than the whole of the British book trade with its 2,000 publishers it is fairly impressive. Bertelsmann has one club alone in Germany with 4,250,000 members. Our most successful book club has well under the half million; and the total number of members of all book clubs in the UK is only just over the half million. So you can see the difference. And Bertelsmann are thinking of coming into this country and using their marketing methods here. I’ve no doubt that this might give some people enough of an affront to see if they can’t sell books very much more quickly! As you probably know, almost anywhere in Western Germany, you can get a book in forty-eight hours from any bookshop. Our failure to produce that sort of wholesale system is to me simply extraordinary. Firm after firm has set up its own large distribution warehouse, in Grantham and Alton and Andover, and all over the place; but they could not get together and produce regional wholesale houses that would have got the book to you and to me, not in three to four weeks, but at the most in three to four days. This, too, may now be very difficult to do, but I don’t think it’s impossible. For example there is the setting up of Charles Hammick’s cash-and-carry warehouse in Hampshire about ten days ago, which is described in this week’s *Bookseller*, and which we can only hope is a harbinger for the future.

But I have no doubt that the reversal of the trend that I’m talking about, of a movement away from the book, will come: in part if we can get prices down, i.e. a technological revolution; in part because they are much better distributed, and people who have got an impulse to go and get a book will get it instantly. Your Chairman mentioned that I was, before I came here, a bookseller. I still own a bookshop, and have done, the same one, for the last twenty-six years; and I am fascinated that if a customer asks for a book, and we say we haven’t got it, can we order it for you? Yes, that’s all right, how long will it take? And we say two and a half to three weeks. Oh, I don’t think so. But if I say, we can have it for you by the end of next week, the answer is, ninety-nine times out of a hundred of course, please get it. So that it shows that there is a span of time for an impulse. We are all of us willing to wait just so long, and no more; and it seems a week is about the span. If we achieve that, then there is hope that books will be more readily bought, because impulses will not be killed off.

But I think, too, that we’ve got to promote the book. We’ve got to promote it in the terms of the NBL and the work it does, not because I’m its Director, but because it is the one organization of an independent nature that is a charitable trust and that exists to promote books. I don’t think it is doing anything approaching what it ought to be doing; but then, it exists, as most of you probably know, on the thinnest of shoe-strings, which threatens every few years to snap altogether. But nevertheless, within those terms, it does of course send out about 300 touring exhibitions a year. It does produce a lot of booklists and bibliographies. It does, whenever it can get other people’s money to do it, try to have campaigns to persuade people to read more; and in those terms, things like Book Flood and the School Bookshop Association are directly in
line with what it would like to do. Even though some of our own staff disapproved of it, in 1971 when we put something on—which you may remember—called Bedford Square Book Bang, which was an attempt to get a lot of people to come to a book fair who would not come to see books but would come for junkets of one sort or another, and then when they were there, they stayed and they really did see the books.

I believe that the book still has advantages which put it infinitely in advance of any other medium of communication. I believe its flexibility is something you cannot replace. We all know that you can read a sentence, not understand it, put a little bit of paper or your finger in the page, read on, come back, read on, come back, forty or fifty times. You try doing that with a tape recorder—you've got to be very skilled indeed, and very lucky, if the tape doesn't break halfway. And anyway, you can do it with the book in the bath or in the plane. You can't take the tape recorder and use it in either of those places. So the book too is portable. The book is private. We live in a civilisation which has increasingly less privacy for all sorts of reasons: we live in smaller habitations, more close to each other, more preyed on and trespassed by each other. For this reason too, anything which increases our sense of privacy is terribly good, if I may be forgiven for using such a word in 1976, for our spirits. It is always a fact which pleases me enormously that if any single one of you here tonight were to turn on a transistor radio, you would trespass on all our attention, but every single one of you could read a different book while in this room, and you would not trespass on each other in any way at all.

Those are perhaps the practical reasons. At a higher level, the splendid thing of course about the book is that it develops the imagination in a way that not even the film, or anything else, has yet succeeded in doing. A very simple example perhaps will show you that. If we all go and see a film where the leading parts are played by Elizabeth Taylor and Richard Burton, then we all see just those two people, and that's it. But if we all read the book, then each one of us is called on to flesh out those characters on the author's bones as we will, and we have got to bring our own imaginations into play. The book, then, remains of tremendous importance in our civilization, whatsoever wonderful technological and electronic ideas are invented. For this reason, Sir, although I started tonight with a slightly warning, pessimistic note, something quite illogical within me believes that the book will somehow triumph in the end. Only it will triumph more easily if all of us are aware of the dangers to it, and push it and fight for it as hard as we can.

TOWARDS AUTOMATIC INDEXING
A New Report

In the INSPEC database three subject identification methods are employed—free-indexing terms, controlled subject headings and detailed subject classifications. Obviously relationships exist between the three and recent research work done under a grant from the British Library by Barry Field, a member of INSPEC's information research team, has been determining and displaying these relationships. The methods used involved the ranking of one type of indexing element with respect to another using a statistically generated adhesion coefficient to reflect the degree of association between the free-indexing terms, controlled subject headings and the classification.

Techniques and computer programs were developed to automatically generate controlled subject headings and classifications from free indexing terms. This involved the automatic truncation and manipulation of free-index phrases and the use of a manually constructed thesaurus together with statistical ranking and weighting methods.

The aim of this study was to assess the possibility of automatically assigning subject headings and classifications. The study included a check on the cost effectiveness of such a system. Results are encouraging—costs are approximately the same as with manual generation, while automatic generation of subject headings gives some 70-82% of the total possible subject headings compared with the manual indexing method which gave an 85% result.

Copies of a 70-page report (R75/20) entitled Towards Automatic Indexing—1 are available (price £4.50, $11.25) from Ms Gill Rodway, INSPEC Reports, IEE, Savoy Place, London WC2R 0BL, England.