



Interview with Brian O’Leary, executive director, Book Industry Study Group

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KENNEALLY: The novel coronavirus is giving us all lessons in subjects we never before would have considered of wide public interest, from policy debates over epidemiological models to the intricacies of supply chains for toilet paper and hand sanitizers. For publishers, the nightly homework assignment in this hard-knock classroom never changes – prepare a survival plan for the next day.

Welcome to Copyright Clearance Center’s podcast series. I’m Christopher Kenneally for Beyond the Book. In a recent survey of more than 200 stakeholders from one end of the publishing workflow to the other, the Book Industry Study Group has documented the symptoms publishers are suffering from the COVID-19 crisis – headaches over sinking revenues and lost orders and gut-wrenching pain from layoffs and canceled projects. BISG executive director Brian O’Leary joins me now with details and a look at the prognosis for publishing in a pandemic. Welcome back to Beyond the Book, Brian.

O’LEARY: Thank you, Chris. It’s always good to be here.

KENNEALLY: You have conducted quite a revealing survey at Book Industry Study Group. Of course, your membership includes trade, education, professional, and scholarly publishers, as well as distributors, wholesalers, retailers, manufacturers, service providers, and even libraries. We’ll focus on what you learned about the publishing sector. But a question to start us off today is why survey the supply chain at all? Why not build on what we already know about each sector?

O’LEARY: Well, there’s certainly a case that there’s good work that’s been done in a number of other associations, including BMI, which is Book Manufacturers Institute, IBPA, the Independent Book Publishers Association, ABA, and more. And I think that those surveys and conversations have helped identify what specific segments, whether it’s publishers, manufacturers, distributors, retailers, and libraries can do. But I think coping with and managing in a post-pandemic world is going to require industry-wide planning, transparency, and collaboration. So we created the survey, actually, to help identify areas of mutual interest and potential cooperation. Where are the pain points? What could we be doing about them now? And what could we be preparing to do now so that we’re able to return as an industry coming out of the pandemic?



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KENNEALLY: It's an interesting holistic view of publishing, Brian. As we say, you surveyed all those various segments of the supply chain in the book industry, including non-members of BISG. What did you ask, and how many people did you hear from?

O'LEARY: Overall, we had almost 250 responses to date. We've left the survey open, and we'll continue to monitor the results. But we asked some basic questions. We tried to keep it short, because people are busy.

The first one is what part of the business are you in? Are you a publisher, a distributor, a manufacturer, etc.? Because it's important to be able to qualify the responses – essentially filter by what part of the business you're currently working in. We asked how each company had been affected by the COVID-19 pandemic. We had a whole bunch of responses both to a fixed set of menus as well as off-the-cuff, open-ended responses. We asked what problems that people felt they would face as a result of restrictions related to the pandemic. And we asked the kinds of information from other companies in the industry that would be helpful for both members and non-members to make better decisions in responding to the pandemic.

KENNEALLY: Brian, what were the top ways that book publishing across the supply chain has been affected in this crisis?

O'LEARY: Top of the list was slower orders. People are just not seeing things coming in. There was a lot of talk in the survey as well as on the follow-up conversation we had with our board that Amazon's decision to focus on emergency rather than non-essential goods was having an effect. Coming with slower orders also comes lost or lower revenues. The difficulty in forecasting effectively, both for inventory as well as demand, was really important. Virtually everybody that we talked to had taken steps to reduce spending, and many were talking about postponing titles or projects. Those are kind of the top five.

Less prevalent, but still significant, generally getting between 30% and 50% responses – publishers talked about canceled orders. Virtually all companies talked about laid-off staff. The inability to fulfill orders was also an issue. Part of that, again, ties back to Amazon's decision to focus on emergency goods and services, but it's also a function of just getting product through the supply chain.

And about one out of every 10 respondents said that they'd shut down their business, which is pretty sobering in this time.



KENNEALLY: Obviously, that kind of range of responses makes great sense, Brian. You live with your members on a daily basis. What's your takeaway? How are they feeling? What's the situation?

O'LEARY: Well, pretty clearly, there's a lot of immediate pain. The industry has never seen anything like this. That's not unique to book publishing, and I think for people listening to this, it's important to understand that we're not looking at it just as a publishing problem, but we're trying to be responsive to the folks who are both members and active in our industry.

There's also a lot of mid-term uncertainty. I think we all feel that no one knows when this is going to end. To the extent that we've heard from anyone about their plans going forward, they say, well, tell me the end date, and I'll tell you what our plans are. So I think that clearer communication is really required to get people on firmer footing.

I think there's a pretty clear need for some entity – it could be BISG, we're certainly willing to step into that – to help pull these conversations together. I think that there's a hankering for understanding not just what's going on in my particular part of it, but what's happening in the industry, and how can we move forward?

KENNEALLY: It's good to hear you say you want to be proactive at Book Industry Study Group. What are the areas that you think have priority? Where could you make a difference?

O'LEARY: There was a lot of interest in hearing what other companies are doing. In some cases, it's what other companies in my sector are doing – so what are other manufacturers or publishers thinking about when it comes to the pandemic? But there were also interest in hearing – say, if you're a publisher, to hear what distributors are up to. BISG actually gets a lot of information from other parts of the industry, and we're going to be putting together a single page, probably a very extensive page, that will point to other resources. We don't need to invent the update on what's going on in manufacturing. BMI's doing a really good job on that. But we can point to it and make sure that the links that we get are always up to date and relevant to the audiences that we serve.

Second piece was people were looking for support in better managing distributed workflows – work from home, working remotely, not working at your desk. That's actually an area where BISG's been really active over the last year and a half, two years. We have a committee – a workflow committee that last year created a white paper on best practices for improving workflows. Elements of that are certainly relevant to the current environment. And we're currently on the same committee



working on creating a tools and resources – what we call a grid and glossary. So the grid would be essentially a listing of all the tools that you might consider. The glossary would provide short, text-driven summaries of each of the elements in the grid.

We're pretty good at brainstorming with others. The industry's been asking for it, and we actually have a committee structure with five standing committees that meet on a monthly basis, each of them. So we're having 60 conversations a year where we're trying to solve problems, and certainly responding to COVID-19 has fallen into that.

And the last piece – I think people are looking to keep up to date. So that resource page that I mentioned a moment ago is a piece of it. But we've also changed some of what we're doing to address that.

KENNEALLY: Most parts of the nation – indeed, much of the world – is about a month into the quarantine related to COVID-19. So responding really is imperative right now. What are the ways, then, that BISG is going to respond in the next several weeks or months?

O'LEARY: We're looking at responding in a variety of different ways, and we've looked at this longer-term as well. The first part of it is an update – like creating a status page that points elsewhere, along the lines of what I was talking about a minute ago. We have a weekly newsletter, and that has typically been providing updates in each of the five charter areas that our committees cover – things like metadata or rights, supply chain, subject codes, and workflow. But we've also added two sections over the last month, one on working remotely with a variety of different links, as well as managing disruption. So it's something that we're already involved with, we're talking about with our committees and with other members within BISG. Any time we find an interesting link, we throw it into the hopper and publish it on a weekly basis.

We're looking at options to revamp our webinar schedule. We do in the range of two dozen webinars a year. That may not be enough, and we're adding pieces that would be more specific to, for example, how to revamp your workflow. We're also looking at doing shorter webinars. We typically do an hour. That's not an unusual length for most programming in the webinar format. But we're looking at doing what we call coffee break webinars, where it's maybe 25 minutes, 20 to 30 minutes in the middle of the morning or in the afternoon – just an opportunity to get people together on a very specific topic and share information in a condensed format so that people can kind of take some notes, get the recording, and hopefully get some value out of it.



We're capitalizing on our workflow resources. We have written a white paper already. It's out there and available to anyone for free – which is a crazy number, free. But we want to make sure that anyone who registers on the BISG website can get access to it. But we're also trying to figure out if we can accelerate the timeframe for delivering our tools and resources grid and glossary, because we think that will also be really practical.

We're doing a lot of work to convene virtually. In some ways, this is something that BISG was built for. We've been meeting – our committee structure's been meeting virtually for more than three years. We've been using Zoom for that entire time. I think it's something that we're really good at. We know how to conduct the meetings. We know how to make them effective, how to make them agenda-driven, but at the same time personal. And we think that that's something we can also bring to the industry.

And within that, we're keeping our committees really active. We're making them available, actually, in the second quarter and maybe longer to non-members. That's not something we've done in the past. Typically it's a privilege of membership. But we recognize that lots of people have a point of view. This is not the time to be trying to sell BISG, but rather the time to bring people together and get them involved in a conversation that can identify and solve problems that are affecting the business in this environment.

KENNEALLY: And the Book Industry Study Group, Brian, is an organization that's been around for quite some time. It's an umbrella organization. It's a wide church. Have you had a chance while in lockdown to reflect on how BISG is going to be a different organization moving forward? What are some of the ways that BISG may change, may evolve in this very dynamic environment?

O'LEARY: I haven't had as much time as I would like. We have a commitment to service, so there's a lot of things to do. But I think a few things are really clear. The first is we have to be flexible. There are a lot of opportunities for us to do good work, but it has to be in response to the environment around us. That means we need to listen more than we speak. That's not such a big shift for us, but it's an important reminder that we need to understand the problems and we need to work with others to make sure that we're working on their behalf.

I think, though, that this is an opportunity for us to make book publishing better. I referred to it before the pandemic as a move to Supply Chain 2.0. But I think that before we can make the book publishing business better, we first have to work on behalf of the many parts of book publishing that need help today. Talking about



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the future or what the future looks like six to 12 months from now seems kind of out of touch with the environment and what we're facing.

And I think, ultimately, a pandemic might be the biggest supply chain challenge any of us have faced. You mentioned at the outset about the challenges of finding toilet paper. Andrew Savikas has talked about the shift in supply chain for bananas. Those aren't publishing, but it's a symptom of how we were built with a certain set of assumptions about how work gets done, and I think we need to both recognize that this is a supply chain challenge and then step up to help the industry meet it in whatever form that takes.

KENNEALLY: Brian O'Leary, executive director of the Book Industry Study Group, thanks for sharing the survey results with us and for your insights.

O'LEARY: Chris, it's always a pleasure, and thank you for having me at this important time.

KENNEALLY: Thank you, indeed, as well, Brian.

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