



**Interview with
Guy LeCharles Gonzalez, Panorama Project**

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KENNEALLY: In the midst of political and social upheaval, where do you turn to gain understanding and to foster empathy? For many Americans, the answers are found in books, and consequently, in libraries. For them, reading is a gateway to move beyond misinformation, habits, and prejudices.

Welcome to Copyright Clearance Center's podcast series. I'm Christopher Kenneally for Beyond the Book.

In 2020, sustained protests have emerged across the United States following a series of deaths of Black Americans while in police custody. With Black Lives Matter as a rallying cry, this 21st-century civil rights movement has attacked systemic racism in American society and called for reform of the police and other public institutions as well as change to businesses and cultural organizations.

With this antiracism as a focus of our national conversation, Americans have gone to libraries and bookstores and made bestsellers out of Robin DiAngelo's *White Fragility* and Ibram X. Kendi's *How to Be an Antiracist*. Beyond those hits, however, dozens of other authors and titles remain to be discovered. In June, *The Washington Post* and the Panorama Project reviewed the lending history of public library systems across the country and developed nine regional reading lists related to civil rights and race and ethnic relations, all reflecting the diverse interests and perspectives of readers in each region.

Guy LeCharles Gonzalez is project lead for the Panorama Project, a research initiative guided by representatives from the American Library Association, the Audio Publishers Association, the Cuyahoga County Public Library, Ingram Content Group, the National Information Standards Organization, Open Road Media, Penguin Random House, Rakuten OverDrive, and Sourcebooks. He joins me now from his New Jersey home office. Welcome to Beyond the Book, Guy LeCharles Gonzalez.

GONZALEZ: Thanks, Chris. Glad to be back.



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KENNEALLY: We are happy to have you back at this particular moment especially. The project that you became involved in with *The Washington Post* is a very revealing one. It's a project, like all the others that you do at Panorama, that is steeped in data, and it really is a very powerful example of the potential for data analysis to reveal things to us that were previously obscure. Tell us how this project came about – *The Washington Post* and Panorama working together.

GONZALEZ: Yeah, so *Washington Post* was working on – a couple of their reporters were working on a story. Initially, they were looking at the rise in interest in certain books that were broadly being termed as antiracist or antiracism literature. At the same time, they were seeing a lot of emphasis on buying those books from Black-owned bookstores, all of which, just like all bookstores, were pretty much closed as a result of lockdown orders from the pandemic.

So as they were digging into that, they came across our program, called Panorama Picks, which is a quarterly initiative that makes an attempt to look at books below the better-known bestsellers to find out what recently published titles are also in demand at the libraries as a way to demonstrate regional differences across the country in interests. The national bestseller lists kind of represent the current zeitgeist – a broad representation of what people are reading. Just below that list, you start to see some regional variations with books that maybe never hit the bestsellers list or hit the list for one week and then faded, but remain particularly popular in a single region or a couple of regions. That's an initiative Panorama Project has been doing for – it'll be a year and a half with our next release.

One of the reporters working on the story for *The Washington Post* came across coverage of Panorama Picks at *Book Riot*, which routinely does a pretty nice deep dive into each quarterly list, so as a result, reached out to me initially just to see when our next release was going to happen. That wasn't scheduled to happen until later this month. So we ended up getting into a discussion around what they were trying to do, what they were looking at, what about Panorama Picks specifically they thought might be interesting, and ultimately we came to develop this project which was a customized version of Panorama Picks which would look at these specific BISACs that they had identified through their own analysis by looking at these books that kept appearing on most recommended reading lists, the ones that had resurfaced on the bestseller lists. They kind of worked backwards, reverse-engineered those BISAC categories, identified the main five that seemed to represent that collection of books, because there is no BISAC for antiracism or antiracist. It's ultimately a marketing term that's been created to reflect a specific area of interest, but it's not one publishers actually recognize as a publishing category for themselves.



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So that outreach led to – ultimately, what we were able to do was take that Panorama Picks framework, which normally looks at a specific publishing date window, which is roughly about six months to a year ago – so we’re not looking at immediate new releases. And we eliminated that parameter, so we wanted to see across basically the full available backlist at libraries what books were getting a lot of attention in libraries in these specific BISACs and then look at beyond – OK, these are the five or 10 that everybody is talking about, some of which popped up on the bestseller list. Let’s dig down a little deeper and see now what’s the second tier of books that people are interested in, and then more importantly, what are the regional variations? That kind of is how the project initiated with *Washington Post* and what led to what was ultimately published with them.

KENNEALLY: What’s fascinating to me, Guy LeCharles Gonzalez, about this effort, is just how it relates so well to the ongoing conversation. That is one that is attempting to be more inclusive of voices, to really open up our national dialogue, to move beyond just the voices that are so commonly heard. Bestseller lists, like Google top results – there’s a certain tyranny in them. It confines us to a short list of answers. But what your work has done is to open that up, and it has revealed just a range of voices, important voices, as well as regional distinctions.

GONZALEZ: Correct. Yeah, I almost compare it to the second page of Google results. There’s an assumption that the first page of Google results is the most relevant, and what we know over the evolution of Google’s algorithm – relevance is not always the key metric that’s driving your appearance on the first page. It’s the strength of your marketing. It’s the attention you were able to gauge. In what we’ve seen a lot, it’s a way “fake news” has proliferated, because the algorithm can be gamed.

The bestseller list is effectively not really any different. A publisher can drive a book to the bestseller list if they put enough marketing muscle behind it, and a lot of publishers’ operations are built around getting books onto that bestseller list. It’s a very short-term focus.

So what was really interesting in that second page of Google search results – one thing we noticed is the oldest book in our list was published in 2003, all the way up to two books from 2020. And within that 17-year range, there were a variety of books, most of which were not appearing on everybody’s recommended reading lists, but each of which had an interesting take on what’s currently the topic du jour. But what it kind of demonstrates is this isn’t a new topic. It’s just the interest has exploded recently. And it’s a category that publishers periodically publish into, but clearly don’t stay on top of until external factors drive the need to. That was made no more clear than a lot of these books ended up going on backorder within a



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couple of weeks of these antiracist reading lists being promoted, because there weren't many left in print and in stock.

That was another impact that libraries had. Libraries – they weed books after a while, or ebook licenses will expire based on publisher terms and lack of interest. But the depth of what we were able to surface in Panorama Picks – I guarantee you half these books were not on any bookseller's bookshelf if bookstores had been open at that point.

KENNEALLY: It also, I think, is important to point out the creativity, the resourcefulness, of the readers – the libraries as well, but the readers themselves. Because as you mentioned, these books do not sort of fall into a single easily defined category. So when people have searched out reading that they think will help them understand these issues better, they've been creative. They have looked into various subject areas, different fields, and found works that satisfied them.

GONZALEZ: Yeah. One thing we don't know from this data is what drove some of these books. Some of it was definitely reader diligence – kind of digging through the library catalog, making connection. Maybe they went looking for Robin DiAngelo's *White Fragility*. That book was not easily available in a lot of libraries.

The other aspect of Panorama Picks is what we're measuring isn't just interest, but also unmet demand. In libraries, there's a thing called holds ratio. Most libraries, their ideal is about three holds per copy that they have available to circulate. If you're person number four on the hold list for a book, that potentially could trigger purchase of another copy of that book so that they can keep holds in that three-to-one ratio. It's a broad average. It doesn't apply to every book. It is an average they rarely are able to meet on the most popular books.

One thing that really stood out in this analysis is that Michelle Obama's *Becoming* was nationally the only book libraries were generally maintaining a three-to-one hold ratio. That book is over a year old. There's still a lot of overwhelming demand for it, but it's demand that, relatively speaking, libraries are able to meet and booksellers. That wasn't a book that went on backorder, because publishers knew that was going to be a big bestseller and maintained inventory for it.

Some of the other books on this list, though, had hold ratios of five-to-one, seven-to-one, 12-to-one. What Panorama Picks does is in our methodology, we're not just saying these are the books that have the most hold requests. These are the books that have the most hold requests relative to libraries' ability to meet demand. In some of these cases, these are books that maybe 200 people want to read, but



libraries in their region had three copies, because they weren't on libraries' radar either.

KENNEALLY: And they wouldn't have been on my radar as a reader, perhaps. So it's helpful information to have these lists published by Panorama with *The Washington Post*. Tell us about the regional differences. I'm in Boston. You're in New Jersey. Would we be reading very different books?

GONZALEZ: Over the course of Panorama Picks in general, and we saw it reflected again in this custom look at the data, there are notable regional differences. Some, I'd say, fit regional stereotypes. So the Midwest and Pacific Northwest – I'm sorry, Midwest and mountains and plains – you'll tend to see books from the religious category more often popping up as uniquely in demand in those regions versus, say, the Northeast or the Pacific Northwest.

What we saw in the antiracist picks lists was some notable regional variation. We identified a few – I think all but two regions had at least one book that was notably in demand only in that region. *Compton Cowboys* was near the top of the list in California. Makes sense – Compton is a very specific neighborhood in southern California. It's probably a book few people outside of California even knew existed. But for some reason, there was a revived interest in that book in this period.

One that was a little less surprising – Tim Madigan's *The Burning*. Tops in the list in mountains and plains, which includes Oklahoma, which is where the book is based. It's about the burning of Black Wall Street. It's a story that the *Watchmen* HBO series kind of built a lot more mainstream awareness around, but it was kind of interesting that a book specifically about that incident that is kind of in the zeitgeist only popped in mountains and plains, as opposed to being one of national interest.

One thing Panorama Picks does not attempt to do is make any editorial judgments on the value of these books. That's a completely different kind of analysis that's outside of the scope of what Panorama Project is focused on. I don't know, say, if *The Burning* is a well written book, a well researched one, a provocative one, or what, but it was notable that in the region where that event happened, in this time period, that book popped up, and it didn't pop up in any other region.

What I've heard anecdotally is a number of libraries have been using these lists to surface these books in their own areas, even if they weren't the books in their region. So *The Compton Cowboys* may suddenly be on an antiracist reading list for



the Boston library. That's one of the uses we've seen of this data over time, and specifically with this list, we've heard that anecdotally from a number of libraries.

KENNEALLY: Guy, we've heard how this is useful information for readers and for libraries. Tell us about the ways you think this could be useful for publishers as they explore not only this particular topic, but just how they think about publishing for the public.

GONZALEZ: I think in my mind, there are two ways publishers can approach this data. The main way we frame it for publishers is you've got your bestsellers. You know how those are doing, and you're putting marketing muscle behind those. Then you've got this second tier of broadly called midlist books that get their initial release, and if they don't immediately catch fire and hit the bestseller list, they basically fade into the background. Hopefully, the author has the individual wherewithal to continue promoting that book, or they luck into a situation in current events that makes their book relevant, and maybe the publisher resurfaces it.

One of the uses for Panorama Picks that we push towards publishers is, look, you have this author who in your mind is a midlist author – didn't hit the bestseller list. You're not putting any more marketing muscle. But they're really popular in libraries in the Midwest. If nothing else, you should either consider trying to sell some more copies to libraries in the Midwest – because remember, this is unmet demand. These are books that patrons want to borrow and libraries don't have enough copies of. You should consider potentially doing some author events in those regions, either with libraries or with local booksellers, if there happens to be one in the right area.

So there's the marketing aspect. These are books you've likely moved on from in your broad marketing initiatives, but there are some regional opportunities here that you or your author should consider leveraging, and libraries are a key partner in that, because unlike, say, Amazon, libraries are willing to share this kind of data. They obviously are not sharing personal data, but circulation data like we're able to access, libraries – many will work directly with publishers when publishers approach them to develop marketing initiatives, particularly where there's a regional relevance that they can tap into. That, for me, is the main way publishers can look at Panorama Picks.

The other way is the broad discussion around the lack of transparency in the industry around sales data and discoverability and are libraries cannibalizing sales, or are they nurturing new readers and generating sales? Panorama Picks is one of the few areas where we're able to take some hard data and actually present it in a



useful way versus unsourced, unverified claims that libraries are cannibalizing sales.

KENNEALLY: And at this particular moment, Guy, during the COVID-19 pandemic, the spotlight is on libraries, because for many readers, that was the only place they could go to get books easily.

GONZALEZ: Yeah, if you look at the data that's been released over the past several months as the pandemic has continued and bookstores are, for the most part, still closed, what was really interesting was you were getting NPD's numbers that for the most part were showing relative stability in book sales, particularly on the print side. There was some fluctuation in categories as people kind of redirected where they were spending their money, particularly in the first couple of months, as kids were facing remote instruction and parents were buying materials that were more focused on their kids' education.

But you put that NPD BookScan data alongside the lagging data about actual physical bookstore sales being as much as 50% in decline, that's an interesting data point. Because if relative print sales are flat or barely going down, or in the most recent report, actually ticking upwards, but physical bookstores are literally collapsing their sales numbers, where are those readers going to buy their books? Probably Amazon.

The other data point we know is that as libraries close their physical buildings, the demand for digital content through libraries also increased. As far as I know, no one's released any hard numbers. I don't think that's an area – OverDrive's in a weird position of probably doing very well as a result, but it's not necessarily something you want to brag about, because the context of why they're doing very well is unfortunately terrible.

But anecdotally, plenty of libraries have noted that they've shifted spending more towards digital content. Most of that spending is to meet consumer demand, patron demand, which is typically bestsellers, or in this window, either specific interests, whether it was educational resources, whether it was some do-it-yourself, self-help psychology reference materials in kind of the middle of the pandemic, or most recently with this *Washington Post* analysis, an increased awareness around cultural issues that led to the increased interest in what is being called antiracism literature.

KENNEALLY: Finally, Guy, this effort is a piece of a far more ambitious project that Panorama is involved in, which is to begin to understand so much better not only what the role of libraries is, but what the public is interested in and how they are



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consuming their content. You are engaged in a couple of ongoing initiatives to learn about that and to have any reporting on that based in data. That's the essential piece of your work. Tell us about those efforts. There is a project underway to measure immersive media consumption.

GONZALEZ: So broadly speaking, Panorama's goal is to drive some transparent conversations around the impact of libraries informed by data as much as possible. I'm a year into leading the project. The year-plus prior to my joining, the initial emphasis was an attempt to actually build a data repository, similar to a BookScan but for libraries, that could really help illuminate this question around what do libraries actually do for the publishing industry, both from a revenue and discoverability perspective?

For a variety of reasons, that aim was kind of – I don't want to say tabled, but we've pushed it to the background. There were a number of obstacles, Amazon being the biggest one, to getting the kind of data you need to do that at scale. It's arguably something the AAP could do through their StatShot initiative, but for one reason or another, that's not a priority for them.

So what we decided – when I joined last year, there was this pivot towards advocacy and engagement where we wanted to directly engage with publishers to figure out, all right, what are the real questions you have about libraries – questions and concerns – and how can we answer them? Anybody who was at the ALA midwinter meeting back in January, when John Sargent from Macmillan spoke to this room full of librarians about Macmillan's embargo, why they made those decisions, how they were gauging the response – one of the biggest things that stood out to me is they were talking past each other. John Sargent had a very specific point of view on libraries that made the mistake to some degree of thinking of libraries as this monolithic entity. Libraries themselves view themselves very individually. There are small libraries, big libraries. There are urban libraries, there are rural libraries. Their approach to digital collections is very different, and there is no one-size-fits-all business model that's going to work for public libraries broadly.

So what we decided to do was reframe this conversation. All right, you don't want to share data, or you're unable to share data in the case of Amazon and their many NDAs. Where can we find some common ground that we can build some consensus, develop some data, do some research, and use that as the foundation to figure out how to move forward? That's where this immersive media study came from. It was a recognition that nobody had really looked at the library space at all in years. *Library Journal* and Bowker years ago partnered on the Patron Profiles



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initiative. A couple of years after that, Pew Research did a pretty deep dive into library usage. That was about 2015, 2016.

Ever since, there's kind of been these anecdotal studies, where there was a question in a bigger study about libraries or a question in a bigger study about book reading or book buying, but no deep dive into book buying behavior. If you think about what's changed in the last five years, back in 2015, library ebooks were still a relatively small percentage of library collection spend. That has significantly grown over the past five years. Ebook sales, at least for the major publishers, 2015 is around when it started to plateau, and then sales allegedly declined. We've seen the long-term impact of publishers losing – or winning, depending on how you look at it – the agency battle, where they were able to control pricing of their ebooks, and as a result, ebooks, particularly on Amazon, are often as expensive as their print versions. So there's a lot of things that have happened over the past five years that potentially have impacted reading and buying behavior, and there's been no research recently to examine that.

And then the other aspect of that is most book research tends to be very myopic. The book world likes to believe it lives in a vacuum and that books are these special snowflakes that are immune to any other interests a reader might have. Another thing that's changed over the past five years – streaming services, paid content. Five years ago, people were laughing about *The New York Times* becoming a major digital subscription-driven business. Yet fast-forward – not only has *The New York Times* made that pivot, *Washington Post*, a number of newspapers, and even more magazine media operations have made that pivot away from being solely reliant on advertising to being also dependent on reader revenue.

Where is that money coming from? There's nothing in the economy that says we all got 20% raises since 2015. So we still generally have the same discretionary income, but you've got a million streaming options. I don't know about you, but I have cut back on cable, and the number of streaming services I have, we pay more for cable, broadly speaking, including all those streaming services, than we ever have. Things didn't get cheaper because cable got unbundled. It got more expensive.

One thing book research tends to not do is put books in the context of the broader media ecosystem that they actually live in. That includes gaming. Gaming has significantly blown up, and it's going through similar changes as the book world has. Gaming has increasingly become digital. GameStop is now on the verge of bankruptcy and going out of business, because the majority of video game sales have shifted to digital channels, digital formats.



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So what we want to do with this research is look at book buyers – look at book reading, because that's the other thing. Book buyers do not represent book readers 100%, whether that's library reading, whether that's I borrow books from my friends, whether that's I only buy books from secondhand bookshops, which no industry organization measures those sales, because that revenue doesn't go back to publishers, all the way down to piracy. Those are all aspects of reading that if you narrowly define your research to book buyers, you're not actually measuring the entire reading ecosystem, and what you end up is what we tend to see – the same audience being measured, which is the same audience publishers prioritize, which coincidentally is the same audience that overwhelmingly responds to online research if you don't have your methodology in order. That's your middle-class, white, Mormon book club participant. That's that core audience for publishing that most research initiatives defer to. So the results reflect the conventional wisdom.

So what we're doing with this initiative is it's cross-industry, so we've got representatives of BISG, Authors Guild, IBPA, PubWest, and ALA all participating in the development of the survey itself and the methodology. We're partnering with Portland State University. We've got two professors who also work in their book publishing program who are going to guide that research. And we're working with Qualtrics, one of the biggest and best research platforms out there, to ensure that our methodology is on point, that we are getting a truly representative sample both nationally on race, gender, and ethnicity, but also we're layering in a regional factor as well. Similar to Panorama Picks, we're going to also be able to look at differences in regional behaviors for book readers.

And as part of this research, we're going to be looking at not just their book engagement, but these other media. We've identified streaming, gaming – now I'm blanking on the third one – three other immersive media types that people spend time and money on so that we can also put books in context. The goal is when this is done and the findings are released, cross-industry participation in the development means cross-industry consensus on the methodology. We can debate the findings all we want, but there won't be any, well, Panorama Picks, that's a library advocacy organization. Of course it says X, Y, Z about libraries. No, you can't make that criticism, because Authors Guild, BISG, IBPA, they were all engaged in this. They all signed off on the final product. We can debate how you want to parse the results, but you can't debate how the survey was developed and fielded. So that'll give us that solid foundation of methodology, and my hope is that from that foundation, it'll be easier to build some cross-industry initiatives around sales and discovery data that's proven really difficult to date. Sorry for that long-winded answer.



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KENNEALLY: No, it was fascinating. And with all of this talk about research, Guy LeCharles Gonzalez, I'm prompted to turn the research back on you. I have to ask you a question. I understand you have been involved in libraries one way or another since your very first job as a page at Mount Vernon Public Library in New York. I guess I have to ask you, during the pandemic and during this moment of social crisis for the United States, was there a book that you turned to that you found particularly helpful in penetrating through the noise, penetrating through the misinformation, helping you better understand what we're all about today?

GONZALEZ: That's an interesting question. I am in that category of people who have found it increasingly difficult to read a book. I just don't have the mental focus or bandwidth right now. My reading is predominantly – and really historically, as much as I love books, am a fan of the format, am an avid reader off and on, time allowing, my primary source of content is magazine media, both physical and online. So I have my preferred brands that I turn to depending on the topic that keep me going, fill me in where I need to.

Books, for me personally, are either a long-term repository or a collection of ideas. For me personally, there's been no recent book that's broken through, because no book (laughter) has been able to break through, unfortunately. But where I've found the most value has been a combination of reputable news sources.

This is an area that I've always kind of challenged publishers on. Forgive me for deviating a little bit, but a couple of years ago, I said something when fake news was really kind of becoming a thing everybody was talking about, and it was, I think, Milo Yiannopoulos – I forget how exactly you say his name – Simon & Schuster had commissioned him for a book – signed him to a book deal. There was a lot of outrage, because there was really no credible reason, other than potentially this guy had an audience to buy books, to give this guy a platform. And they ultimately backed down after a lot of pushback, particularly from authors who were published by Simon & Schuster. Roxane Gay notably pulled a book from them as part of her protest.

But at that time, I had made a point about – one of the missing gaps for publishers is they only think about books. So a perfect example right now – imagine a publisher that had a bigger, less book-centric media platform with the John Bolton book as an example. Instead of holding that book for publication, what if their platform was broader, and they themselves – instead of signing an exclusive excerpt to *The Atlantic*, which is the traditional approach, what if they had a platform that was actually built towards leveraging this deep repository of great content hidden in their books to become a credible media organization themselves



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rather than drafting on the influencers and other media brands that kind of generate book interest for them?

So my reading habits kind of lean much more that way. Books, to me, more often are a capturing of what happened, and I'm less inclined in most cases to look backwards than I am to be in the moment. So magazine media, physical and online, definitely suits my reading preferences a lot better, especially in a time like this.

KENNEALLY: Well, it seems to me that what you're describing is a digital world where the boundaries of format no longer are as important as the content itself. I think that's something we can all understand in our own lives, whatever we prefer to consume.

We have speaking today with Guy LeCharles Gonzalez. He is project lead for the Panorama Project. Guy, thanks so much for joining me on Beyond the Book.

GONZALEZ: Thanks, Chris. Glad to be here.

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