

Institution: University of Cambridge
Unit of Assessment: UoA23
Title of case study: The transformation of the book publishing industry in Britain and the US
<p>1. Summary of the impact (indicative maximum 100 words)</p> <p>Research undertaken by Professor John Thompson on the recent transformation of the book publishing industry has had an impact on practitioners in the publishing industry; on associated professions dependent on the publishing industry, such as writers of fiction and general interest nonfiction; on libraries and their acquisition policies; and on public debates. International reach is attested to by, among other things, invitations to address key professional bodies and writers organizations in the UK, Norway, Sweden, Denmark, Brazil and Argentina, citations in government reports in Norway and participation in policy discussions at the Library of Congress in the US.</p>
<p>2. Underpinning research (indicative maximum 500 words)</p> <p>The underpinning research was carried out by Thompson in the period from 1999 to 2012 at the Department of Sociology in Cambridge. During this period Thompson held two ESRC grants. The first grant supported a three-year research project on 'New Technologies and Global Change in the Book Publishing Industry'; this research focused on the transformation of academic and higher education publishing in Britain and the US from c1960 to c2005. It involved detailed case studies of 16 publishing firms in Britain and the US and around 230 interviews. The project had a full-time Research Assistant (2000-2) who helped gather background materials, etc., but Thompson did all of the on-site research, all of the interviews and all of the analysis and writing-up. The key output was <i>Books in the Digital Age: The Transformation of Academic and Higher Education Publishing in Britain and the United States</i>.</p> <p>The second grant supported a three-year research project on 'Concentration and Innovation in the Book Publishing Industry'; this focused on the transformation of mainstream trade publishing in Britain and the US from c1960 to c2010 and on the making of bestsellers. Thompson conducted all of the research, which involved more than 280 interviews with CEOs, CFOs, publishers, editors, sales managers, marketing managers, agents, booksellers, review editors, authors and others involved in the book publishing business. The End of Award Report was awarded the top grade – Outstanding – by the ESRC. The key output was <i>Merchants of Culture: The Publishing Business in the Twenty-First Century</i>. Thompson carried out additional research in 2011, including 20 new interviews, to update the book for the new paperback edition, which was published in 2012.</p> <p>The principal aim of these two research projects was to provide a systematic account of the changing structure of the modern book publishing industry and to examine the key challenges confronting the industry today. Prior to this research, the study of the modern book publishing industry had been largely neglected in the social sciences. The research set out to fill this gap. The two main outputs, taken together, now represent the most sustained account of the transformation of the modern book publishing industry available in any language.</p> <p>Thompson develops an original theory of publishing fields and uses it to analyse the structure and transformation of three of the most important sectors of the book publishing industry: academic publishing, higher education publishing and mainstream trade publishing. He shows that each publishing field is characterized by a distinctive set of processes and developments that comprise what he calls 'the logic of the field'. By reconstructing this logic through careful fieldwork, he shows how and why the field has evolved as it has and why agents act as they do. He also sheds light on the key challenges faced by the industry today, as the unfolding of the logic of the field collides with a technological revolution that is beginning to challenge and disrupt the traditional rules of the game, forcing all the key players in the field to reconsider their positions and practices.</p>
<p>3. References to the research (indicative maximum of six references)</p> <p>Key outputs:</p> <ol style="list-style-type: none"> 1. Thompson, John B. <i>Books in the Digital Age: The Transformation of Academic and Higher Education Publishing in Britain and the United States</i> (Cambridge: Polity, 2005), 468 + xii pp. Peer-reviewed book. Shortlisted for five prizes: the Marshall McLuhan Outstanding

Book Award, the Lewis Mumford Award for Outstanding Scholarship, the Susanne K. Langer Award for Outstanding Scholarship, the Sharp DeLong Book Prize, and the Independent Press Publishing Award. Translated into Chinese. Widely reviewed in the media and in specialist journals: 'An analysis that is as compelling as it is thorough... a fascinating study of the contemporary academic publishing world' (*Times Higher Education Supplement*); 'faultless, fascinating... a must-read' (*Logos*); 'a truly landmark study' (*Journal of Scholarly Publishing*); 'This is undoubtedly the best book I have read about publishing... It is the only book about publishing I have ever read where every statement rings true' (*Learned Publishing*).

2. Thompson, John B. *Merchants of Culture: The Publishing Business in the Twenty-First Century* (Cambridge: Polity, 2010), 432 + viii pp. Peer-reviewed book. Widely reviewed in the media and in specialist journals: 'This impressively comprehensive and revealing analysis of the structures and processes of modern publishing is timely as the industry faces its digital future' (*Times Higher Education, Book of the Week*); 'A fine-grained snapshot...of the terminal struggle of traditional publishers. [Thompson's] mordant picture of an industry in crisis gives publishers, writers and readers much to think about' (*The New York Review of Books*); 'Thompson brings forensic keenness, acuity, breadth, depth and wit to this page-turning study of the book trade, its denizens, demons and deities. It ought to be prescribed reading for publishers, booksellers, writers, authors, reporters, reviewers and critics' (*The Mail and Guardian*); 'Thompson's research has produced an excellent history and analysis; it's a wonderful book, highly recommended' (*Australian Book Review*); 'Excellent and fascinating study of the book business at this critical time...Superb stuff. This is why we have academies and academics' (*West Cork Times*); 'Thompson has written a seriously good, almost monumental work, one that will quickly become required reading for seasoned practitioners and newcomers alike' (*Logos*); '*Merchants of Culture*—in-depth, perceptive, profound—will remain the industry benchmark for years to come' (*Publishing Research Quarterly*).
3. Thompson, John B. *Merchants of Culture: The Publishing Business in the Twenty-First Century*, second edition (Cambridge: Polity; New York: Penguin, 2012), 441 + x pp. Paperback edition, revised and updated. Translated into Portuguese and Chinese.
4. 'Survival Strategies for Academic Publishing', *The Chronicle Review* (17 June 2005), pp. B6-B9. Reprinted in a leading scholarly journal in the field, *Publishing Research Quarterly*, vol. 21, no. 4 (Winter 2005), pp. 3-10.
5. 'Publishing in the Twenty-First Century', interviewed by Gabriel Cohen, *Poets & Writers* (March-April 2011).
6. 'The New Era of Publishing?' interviewed by Williams Cole, *The Brooklyn Rail* (December 2011).

Relevant research grants:

- 1999-2003, 'New Technologies and Global Change in the Book Publishing Industry', ESRC grant (£233,988, awarded to John Thompson as PI).
- 2005-2008, 'Concentration and Innovation in the Book Publishing Industry', ESRC grant (£47,154, awarded to John Thompson as PI).
- 2013-2016, 'The Digital Revolution in Publishing', Andrew W. Mellon Foundation grant (\$136,154, awarded to John Thompson as PI).

4. Details of the impact (indicative maximum 750 words)

The impact of this research is evident in four main areas:

1 The research has been actively taken up by professionals and practitioners in the publishing industry as well as by governments and used as a key resource for reflecting on business practices and strategies and developing policies. *Books in the Digital Age* and the article in the *Chronicle for Higher Education* in the US, 'Survival Strategies for Academic Publishing', were much discussed by senior managers in the university presses and other academic publishers [sources 1, 2]; they had an impact both on the strategic thinking of university presses and on the understanding and practices of editors: 'It definitely changed my awareness', said the Editor-in-Chief at Oxford University Press; 'at conferences and on campus visits, I lay out Thompson's thesis constantly to scholars wondering about the role of commercial publishers in the scholarly

publishing world, particularly with regard to works of original scholarship'. *Merchants of Culture* has been widely read and discussed by professionals working in trade publishing and is seen by many as the best guide to understanding their industry. For example, Sealy Yates, a literary agent, describes it as 'a must-read for anyone currently working in any position in trade publishing.' Thompson is often invited to present the main findings of his research to meetings of the main professional bodies and events in Britain, Europe and Latin America. He gave keynote presentations at the 34th and 37th Buenos Aires Book Fairs (2008, 2011), the Bienal do Livro de Sao Paulo (2010), the Swedish publishers association (2011), the Danish publishers association (2011), a gathering of the leading Norwegian publishers (2011), the annual conference of the Independent Publishers Group in the UK (2012) and a conference with key figures in the Brazilian publishing industry (May 2013). His work has been taken up and used by many publishing houses in different countries to inform and shape their strategic thinking. For example, a Director of Gyldendal, the largest publisher in Denmark, said: 'Publishers in Denmark have read with great interest John Thompson's unique and important books on publishing, which have become key reference points for those of us who work in the industry... It is relatively easy to apply Thompson's analysis in actual practice, not least because he establishes a precise terminology and conceptual framework that enable us as publishers to understand better and more clearly what we do. This in itself is very valuable, because you have to be able to form a clear and accurate view of what you are doing at the moment in order to be able to change and adapt to a new and emerging reality' [source 3]. Thompson was invited to give a presentation to senior managers at Aschehoug, one of the largest publishers in Norway, after which the CEO said: 'We have bought a number of copies of *Merchants of Culture* for key staff in our house, for our board and for our owners. Your work has had, and continues to have, an impact on our way thinking about the complicated mission of running a publishing house of our kind. It has been internalized in our mindset so that we have it as an important part of our frame of reference'. The book has been used by start-ups – both traditional print publishers and digital publishers – as a crash course in publishing. The co-founder and CEO of a leading digital start-up in the UK put it like this: 'Your book was a revelation for us, providing exactly the insight that we needed to formulate our strategy and to understand the competitive landscape we were entering. The book is essential reading for everyone in the company and I have recommended it to many of our digital publishing peers' [source 4]. His co-founder concurred: '*Merchants of Culture* is a very important practical guide to navigating the shark infested waters of the publishing world, and I recommend it to everyone I come into contact with in that benighted industry. It is a rare combination of serious academic research with actually useful and directly actionable information.' *Merchants of Culture* also had a direct impact on, and is cited extensively in, a report commissioned by the Norwegian government on the position of small and medium-sized publishers in Norway, *Rapport om småforlag*, and a report on book pricing commissioned by the Norwegian Ministries of Culture and Education, *Til bokas pris* [sources 5, 6, 7]. The report on book pricing, which draws directly on Thompson's analysis of price competition and the role of supermarkets in the UK, was discussed in the public debate in Norway and was influential in the development of the proposal for a Norwegian Book Law presented to the Norwegian parliament in 2012.

2 The research has also had an impact on related professionals who depend on the publishing industry, such as writers of fiction and general interest nonfiction. Many writers have a limited understanding of the industry, even though they may depend on it for their career and livelihood. Thompson's research has been welcomed by writers and writers' organizations as a valuable guide to the industry and a way of informing their actions and understanding. He has been invited to give accounts of his findings in magazines that are widely read by writers, such as *Poets & Writers* and *Brooklyn Rail*. He was invited to give the keynote address at the Annual General Meeting of the Norwegian Nonfiction Writers and Translators Association in 2011, which, according to a leading authority on the book business in Norway, 'definitely was of importance for authors' understanding of the situation in international publishing'. Thompson has received many letters from writers attesting to the fact that his research has changed their understanding of the industry and helped them to make better decisions and career choices. For example, a children's book writer in Australia said: 'Have just read *Merchants of Culture* and finally been able to put together all the pieces of the publishing industry that have been so puzzling... I can't tell you how enlightened I am by your publishing insights. I can finally make some informed career decisions'. A *New York Times* best-selling fiction writer wrote: 'I've just finished reading *Merchants of Culture*

and I wanted to tell you how much I enjoyed it... Since I now have an extensive publishing and agent team, it is so helpful to know the demons that haunt them so that I can both perform my own role as author better and interpret more accurately why a certain piece of advice may have been imparted'. And this from a poet in the US: 'I have been a writer for 20 years and can honestly say your book illuminated so much for me. It has explained the marginalized feeling I can sometimes have as a writer and, oddly enough, it was comforting to see it so clearly explained... I hope you will continue your study of this fast-changing field. We, the writers, need you to help us stay informed and, as such, empowered'.

3 Thompson's research has been taken up by libraries and other organizations that are part of the book supply chain and key players in the information economy. For example, the Library of Congress in Washington D.C. invited Thompson to be part of a small group of 15 leading researchers working on the social impact of the digital revolution to advise the Library on the development of a new strategic plan to guide investment decisions related to the Library's collections and services for the next 25 years. Thompson presented his analysis of the transformation of the publishing industry and the likely future trends in publishing and information dissemination to senior managers at the Library of Congress in July 2012 and his analysis has been incorporated into the development of the Library's Digital Revolution initiative – 'you have definitely influenced our thinking', commented one senior manager at the Library of Congress.

4 The research has also had an impact on public debates about changes in the publishing industry and the implications of these changes for literary culture and the future of the book. The dramatic changes affecting the world of publishing have given rise to a great deal of public interest and concern, and Thompson is often turned to by the media as an expert. *Merchants of Culture* has been widely and very positively reviewed in the general press – 'A superb history and analysis of publishing and bookselling' (*New Statesman*, *Books of the Year*); 'The best account we have of what happened to publishing' (*The Observer*); 'authoritative' (*The Guardian*) (see §3 above for further references). Thompson has appeared on radio programmes in the UK (Thinking Allowed, BBC 4 [source 8]) and Australia (The Book Show, Australian Broadcasting Corporation [source 9]) which reached large audiences. His 2011 Adam Helms Lecture, sponsored by the University of Stockholm and the Swedish Publishers' Association, was attended by a large audience in Stockholm and was filmed and broadcast on Swedish television [source 10]. Thompson has been interviewed on the BBC 4 Today Programme twice – once in relation to his presentation on the making of bestsellers at the LSE Literary Festival (February 2011) and again as an expert commenting on the merger of Random House and Penguin (November 2012). His presentation on the transformation of the publishing industry at the Hay Literary Festival in May 2012 was attended by a large audience, as were similar presentations in New York (October 2012), Antwerp (March 2013), Lisbon (October 2013), Rio de Janeiro (November 2013) and elsewhere. Interviews with Thompson have appeared in numerous newspapers around the world including the *Toronto Star*, *La Vanguardia* (Spain) and *O Estado de Sao Paulo* (Brazil). Through these and other forms of public engagement, many of which have been made available online, Thompson's research has furthered the public understanding of the social, economic and technological transformations currently affecting the oldest and one of the most important of our cultural industries.

5. Sources to corroborate the impact (indicative maximum of 10 references)

- 1 President, Oxford University Press
- 2 Director Emeritus, Penn State University Press
- 3 Director, Gyldendal
- 4 CEO, Touch Press
- 5 Professor, University of Oslo, and co-author of *Til bokas pris* and *Rapport om småforlag*
- 6 <http://www.regjeringen.no/nb/dep/kd/dok/hoeringer/hoeringsdok/2012/horing---utredning-om-litteratur--og-spr.html?id=673134> *Til bokas pris*
- 7 <http://www.nffo.no/Publikasjoner/default.aspx> *Rapport om småforlag*
- 8 <http://www.bbc.co.uk/programmes/b00vr5f>
- 9 <http://www.abc.net.au/radionational/programs/bookshow/john-thompson-on-the-merchants-of-culture/2990276>
- 10 <http://urplay.se/164663>