



BOOK PUBLISHERS

AUSTRALIA

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- For further information about these and related statistics, contact the National Information and Referral Service on 1300 135 070 or Helen Shannon on Adelaide 08 82377420.

NOTES

ABOUT THIS PUBLICATION

This publication presents the results from the 2000–01 Book Publishers Survey covering businesses which had either book publishing as their main activity or generated \$2m or more in income from book publishing.

As well as collecting financial information from book publishers, the survey sought details on the numbers and types of books published and sold.

The survey was previously conducted in respect of 1999–2000 and key data from that survey are included in this publication for comparative purposes (see paragraph 18 of the Explanatory Notes for information on revisions to the 1999–2000 data). While similar surveys were also conducted in respect of 1994, 1995–96 and 1997–98 some refinements to the most recent surveys (see paragraphs 15 to 17 of the Explanatory Notes) limit the comparability of data across all years. Comparisons can be made for the number and value of books sold, and the landed cost of books imported; these have been included in this publication.

The survey was conducted by the Australian Bureau of Statistics (ABS) with funding provided by the Department of Communications, Information Technology and the Arts as part of the Book Industry Assistance Plan.

ROUNDING

Where figures have been rounded, minor discrepancies may occur between the sums of the component items and the totals. Published percentages are calculated prior to rounding of the figures and therefore some discrepancy may occur between these percentages and those which could be calculated from the rounded figures.



ABBREVIATIONS

\$m	million dollars
ABS	Australian Bureau of Statistics
ANZSCC	Australian and New Zealand Standard Commodity Classification
ATSIC	Aboriginal and Torres Strait Islander Commission
IVA	industry value added
RSE	relative standard error
SE	standard error
USA	United States of America

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SUMMARY OF FINDINGS

INTRODUCTION

This publication presents data, in respect of 2000–01, for businesses which had either book publishing as their main activity (book publishers) or generated \$2m or more in income from book publishing, although this was not their main activity (other major contributors).

OVERVIEW

For 2000–01, 221 businesses were identified as book publishers while a further 7 were other major contributors. These 228 businesses sold a total of 104.3 million books valued at \$1,260.6m. With a total income of \$1,361.2m, expenses of \$1,321.7m and a change in inventories equalling \$23.1m, the overall operating profit before tax of these businesses was \$62.7m (table 1).

The 20 largest book publishers (in terms of income) generated 76% (\$1,029.5m) of the total income for book publishers and other major contributors. Similarly, the 20 largest book publishers achieved 76% (\$955.6m) of the value of total book sales and sold 72% (75.3 million) of all books. Their share of the total expenses was 74% (\$982.2m) (table 1).

Book publishers and other major contributors reported an average profit margin of 4.6%. For the largest 20 book publishers, the profit margin was 6.0%. For other book publishers, income and expenses were approximately equal, so there was no profit margin. Other major contributors had a profit margin of 2.7%. The 20 largest book publishers contributed \$286.9m to industry value added (IVA), which is a measure of the value which an industry adds to the overall economy. This was 75% of the total (table 1).

At the end of June 2001, book publishers and other major contributors employed 4,974 people, 3,288 (66%) of whom worked for the 20 largest book publishers (table 1).

INCOME

Sales of books contributed \$1,260.6m (93%) to the total income of book publishers and other major contributors. This included an amount of \$512.9m for the sales of imported titles. Other income was mainly from sales of other goods (\$29.6m), services (\$20.6m), and royalties and sales of rights (\$20.1m).

EXPENSES

The major components of total expenses (\$1,321.7m) were printing costs, wages and salaries, and the cost of imported books. Printing costs, which accounted for \$246.8m or 19% of total expenses, were similar for printing in Australia (\$123.4m) and overseas (\$123.3m). Wages and salaries contributed \$223.7m (17%) to total expenses while another \$49.9m was spent on other labour costs. Businesses spent \$211.0m (16%) on imported books (table 5).

METHOD OF SALE

The majority of book sales (77% or \$968.3m) were to retailers and other book distributors for on-selling to individuals and organisations. The remaining sales (23% or \$292.3m) were transacted directly with the final consumer (table 11). An estimated \$1.1m (0.1%) of total book sales were made through the Internet (table 1).

SALES OF BOOKS BY CATEGORY

Of the 228 businesses identified as book publishers and other major contributors, 128 were involved mainly in publishing books of general content while the remainder were predominantly publishing educational books (including professional and reference books) (table 3).

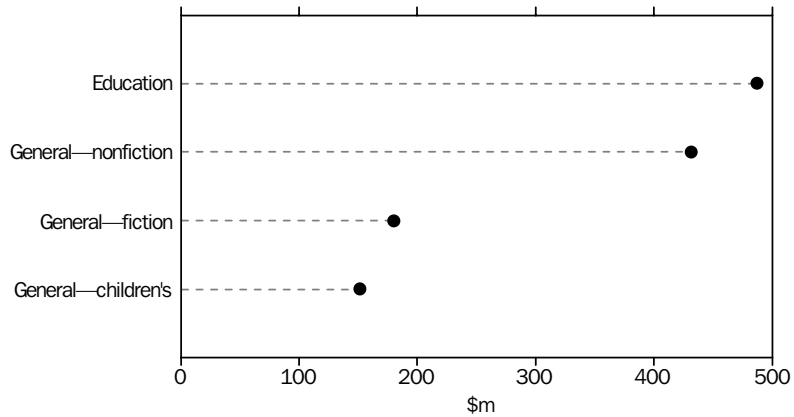
SUMMARY OF FINDINGS *continued*

SALES OF BOOKS BY CATEGORY *continued*

Book publishers and other major contributors sold \$763.2m worth of printed books of general content covering nonfiction (\$431.6m), fiction (\$180.2m) and children's books (\$151.4m). A further \$487.0m worth of sales were for printed educational books while sales of electronic books (which includes audio books) totalled \$10.4m (table 9).

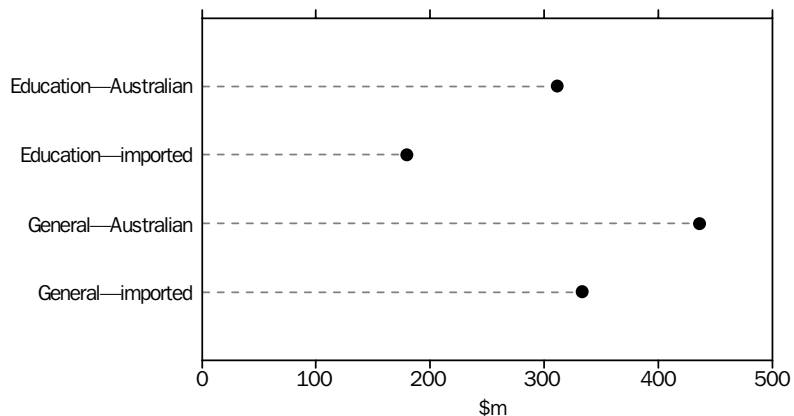
Many books are published as a hardback or trade paperback before being reissued as a mass-market paperback. The value of sales of general trade paperback books was \$316.8m, compared with sales of general hardback books of \$239.3m and general mass-market paperback books of \$207.1m (table 9).

SALES OF PRINTED BOOKS BY CATEGORY



New titles accounted for \$666.9m or 53% of total book sales (table 12). Australian titles comprised 59% (\$747.7m) of total book sales and 63% (\$311.4m) of educational book sales. The sales of Australian titles comprised \$710.0m for titles originated in Australia (95% of Australian titles) and \$37.8m for titles acquired from overseas under separate rights agreements (5%) (table 13).

SALES OF BOOKS BY CATEGORY AND ORIGIN OF TITLE



SALES OF AUSTRALIAN AND IMPORTED BOOKS

There were 61.3 million printed books sold which were originated and published by Australian book publishers and other major contributors. The value of these sales was \$681.2m, giving an overall average selling price for Australian originated books of \$11.1 per book. Of such books, tertiary education books had the highest average selling price (\$29.4) (table 14).

SUMMARY OF FINDINGS *continued*

SALES OF AUSTRALIAN AND IMPORTED BOOKS *continued*

There were 37.9 million imported printed books sold by Australian book publishers and other major contributors with a sales value of \$511.6m and an overall average selling price per book of \$13.5. Tertiary education books were again the most expensive on average (\$36.9) while children's mass-market paperbacks were the cheapest (\$5.1) (table 14).

The value of sales of printed educational books originated and published by Australian book publishers and other major contributors was \$295.9m, which is 66% more than the value of sales of those imported (\$178.4m). For nonfiction books, sales of Australian originated publications (\$261.2m) were 84% higher than the equivalent figure for imports (\$142.0m). For fiction and children's books, however, sales of imports exceeded those of Australian originated publications. Sales of imported fiction books were \$89.1m compared with sales of Australian originated fiction of \$78.7m. For children's books, sales of imports were \$102.1m; this is more than double the \$45.3m for sales of the Australian originated product (table 14).

NEW AUSTRALIAN TITLES PUBLISHED

There were 8,447 new Australian titles published during 2000–01 of which 7,392 (88%) were printed titles originated by Australian book publishers and other major contributors. The majority of these printed titles (52% or 3,877) were educational. Of the 3,515 general-content titles, 44% were mass-market paperbacks, 39% were trade paperbacks and the remaining 18% were hardbacks (table 15).

EXPORTS

Export sales of books amounted to \$162.5m or 13% of total book sales. Re-exports contributed \$6.6m to this amount (table 10).

The United States of America (USA) was the biggest single market for books exported from Australia, with sales to the USA totalling \$55.4m which was slightly over one-third (34%) of the total value of exports. Other significant markets were New Zealand (\$26.8m) and the United Kingdom (\$23.1m), while Papua New Guinea, Fiji, and Pacific countries and territories accounted for \$20.6m together (table 10).

The total sales of rights to businesses in other countries was \$3.9m (table 10).

EMPLOYMENT

At the last pay period ending June 2001, book publishers and other major contributors had a total employment of 4,974 people. Of these, 1,803 were males and 3,171 were females. Of the 4,974 people, the majority (3,859 or 78%) were full-time permanent employees. An additional 318 people (6%) were employed permanently on a part-time basis, 673 people (14%) were employed as casuals and 123 (2%) were working proprietors and partners (table 8).

STATE AND TERRITORY DATA

In 2000–01, book publishers and other major contributors that were based, or had their head office, in New South Wales accounted for 63% (\$790.8m) of total books sales. Victoria's contribution was 32% (\$397.5m) of total book sales (table 2).

CHANGES OVER TIME

A comparison of survey data for 1999–2000 and 2000–01 shows relatively small changes in estimates for most data items. With the exception of four data items, the changes are not statistically significant and thus may not represent real changes over time (see Explanatory Notes paragraphs 8 to 14). The statistically significant changes relate to the number of books sold, the operating profit before tax, the profit margin and the average

SUMMARY OF FINDINGS *continued*

CHANGES OVER TIME

continued

wages and salaries per employee. The total number of books sold decreased by 19% (from 129.4 million books in 1999–2000 to 104.3 million books in 2000–01). At the same time, operating profit fell from \$105.6m to \$62.7m, with an associated fall in the profit margin from 7.8% to 4.6%. Average wages and salaries increased by \$6,600 over the same period (table 16).

Several data items are comparable across the five collection periods since the survey began in 1994 (see paragraphs 15 to 17 of the Explanatory Notes). For example, since 1994 the total sales of books (both Australian and imported titles) has risen steadily from \$841.7m to \$1,270.4m in 1999–2000 before decreasing slightly in 2000–01 to \$1,260.6m. The ongoing increase in the value of books sold to 1999–2000 is not reflected in the number of books sold which has fluctuated since 1994; it peaked in 1995–96 (130.6 million) and fell to its lowest level in 2000–01 (104.3 million). Generally, the value of export sales of books has steadily increased over the years; export sales of books in 2000–01 (\$162.5m) were over double the export sales in 1994 (\$81.1m) (table 17).

KEY AGGREGATES, By business size

		BOOK PUBLISHERS(a)			OTHER MAJOR	TOTAL
		<i>Largest</i> 20(c)	<i>Remainder</i>	<i>Total</i>	CONTRIBUTORS (b)	BUSINESSES
Number of books sold	million	75.3	27.7	103.0	1.3	104.3
Income						
Sales of all books						
Sales of Australian titles	\$m	530.0	185.0	715.0	32.7	747.7
Sales of imported titles	\$m	425.7	82.3	507.9	4.9	512.9
<i>Total</i>	\$m	955.6	267.3	1 223.0	37.7	1 260.6
Sales of other goods	\$m	np	np	29.6	—	29.6
Other income	\$m	np	np	69.7	1.3	71.1
<i>Total</i>	\$m	1 029.5	292.7	1 322.3	39.0	1 361.2
Average income per business	\$m	51.5	1.5	6.0	5.6	6.0
Expenses						
Wages and salaries	\$m	156.8	57.4	214.1	9.6	223.7
Royalties and fees	\$m	61.5	21.8	83.2	1.8	85.0
Other expenses	\$m	764.0	222.2	986.2	26.8	1 013.0
<i>Total</i>	\$m	982.2	301.4	1 283.5	38.2	1 321.7
Average expenses per business	\$m	49.1	1.5	5.8	5.5	5.8
Inventories						
Change in inventories	\$m	*14.2	8.7	22.9	0.3	23.1
Ratio of inventory to sales of all books	%	24.6	26.6	25.0	8.4	24.5
Employment						
Males	no.	1 133	570	1 703	100	1 803
Females	no.	2 155	864	3 019	152	3 171
<i>Persons</i>	no.	3 288	1 434	4 722	252	4 974
Average employment per business	no.	164	7	21	36	22
Other key aggregates						
Ratio of royalties and fees to sales of Australian titles	%	11.6	11.8	11.6	5.6	11.4
Export sales of books(d)	\$m	131.0	30.5	161.5	1.0	162.5
Internet sales of books	\$m	np	0.6	np	np	1.1
Operating profit before tax	\$m	61.6	—	61.6	1.0	62.7
Profit margin	%	6.0	—	4.7	2.7	4.6
Industry value added	\$m	286.9	80.6	367.6	14.4	382.0
Average wages and salaries per employee	\$'000	36.4	33.2	46.6	38.1	46.1
Number of businesses	no.	20	201	221	7	228

np not available for publication but included in totals where applicable, unless otherwise indicated

— nil or rounded to zero (including null cells)

* estimate has a relative standard error of between 25% and 50% and should be used with caution

(a) Includes only businesses for which the predominant activity is book publishing.

(b) Includes only the book publishing activity of businesses for which the predominant activity is not book publishing, but book publishing income is \$2m or more.

(c) Ranked in terms of total income.

(d) Includes re-export sales of \$6.6m and excludes sales of rights which totalled \$3.9m.

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SUMMARY OF OPERATIONS(a), By state and territory

	<i>Sales of all books</i>	<i>Other income</i>	<i>Total income</i>
	\$m	\$m	\$m
New South Wales	790.8	60.5	851.3
Victoria	397.5	26.7	424.2
Queensland	52.5	6.7	59.2
South Australia	12.1	3.9	15.9
Western Australia	6.8	2.8	9.6
Other States and Territories	0.9	0.1	0.9
Australia	1 260.6	100.6	1 361.2

(a) Businesses with operations in more than one state or territory are classified according to the location of their head office.

3

CATEGORY OF BOOK MAINLY SOLD(a), Selected data items

		<i>Primary and secondary education</i>	<i>Tertiary education</i>	<i>Professional and reference</i>	<i>General(b)</i>	<i>Total</i>
Total income	\$m	302.5	96.6	135.5	826.7	1 361.2
Total expenses	\$m	284.2	75.5	135.2	826.8	1 321.7
Change in inventories	\$m	-1.8	-1.8	4.0	22.8	23.1
Operating profit before tax	\$m	16.4	19.3	4.3	22.7	62.7
Profit margin	%	5.4	20.0	3.1	2.7	4.6
Number of businesses	no.	52	21	27	128	228

(a) Each business is classified according to whether its book sales are predominantly: primary and secondary education; tertiary education; professional and reference; or general (fiction, non-fiction or children's).
 (b) Includes any businesses predominantly selling electronic books.

COMPONENTS OF INCOME, By employment size(a)

	BOOK PUBLISHERS(b)		OTHER MAJOR	TOTAL
	PUBLISHERS(b)		CONTRIBUTORS(c)	BUSINESSES
	0-19 persons	20 or more persons		
	\$m	\$m	\$m	\$m
Sales of books(d)				
Australian titles				
Originated and published by the business	80.3	577.0	32.0	689.3
Originated by other publishers and co-published by the business	1.7	25.3	0.1	27.0
Distributed on behalf of other Australian publishers	2.9	27.9	0.6	31.4
Imported titles	40.2	467.8	4.9	512.9
<i>Total</i>	<i>125.0</i>	<i>1 097.9</i>	<i>37.7</i>	<i>1 260.6</i>
Sales of other goods	2.7	26.9	—	29.6
Other sources of income				
Income from royalties and sales of rights	3.3	np	np	20.1
Funding from Federal, state and/or local government(e)	2.2	0.5	—	2.7
Public Lending Right income	0.2	np	np	0.6
Copyright Agency Limited income	0.8	np	np	5.1
Educational Lending Right income	0.1	0.2	0.1	0.4
Income from services	3.5	17.0	0.2	20.6
Other income	*3.7	np	np	21.6
<i>Total</i>	<i>13.6</i>	<i>56.2</i>	<i>1.3</i>	<i>71.1</i>
Total income	141.3	1 181.0	39.0	1 361.2

— nil or rounded to zero (including null cells)

np not available for publication but included in totals where applicable, unless otherwise indicated

* estimate has a relative standard error of between 25% and 50% and should be used with caution

(a) Of the 228 businesses included in the survey, there were 221 book publishers and 7 other major contributors. Of the book publishers, 35 employed 20 or more persons while 186 employed less than 20 persons as of June 2001.

(b) Includes only businesses for which the predominant activity is book publishing.

(c) Includes only the book publishing income of businesses for which the predominant activity is not book publishing, but book publishing income is \$2m or more.

(d) Net of trade, quantity or cash discounts.

(e) Includes book bounties, export market development grants, etc.

COMPONENTS OF EXPENSES, By employment size

	BOOK PUBLISHERS(a)		OTHER MAJOR	TOTAL
	PUBLISHERS(a)		CONTRIBUTORS(b)	BUSINESSES
	0-19 persons	20 or more persons		
	\$m	\$m	\$m	\$m
Wages and salaries paid to own employees				
Artists, designers, illustrators	1.5	9.2	0.3	11.0
Editors	4.9	15.1	3.7	23.7
Publishers	4.0	np	np	18.1
Typesetters	0.9	np	np	1.9
Other	17.8	146.0	5.3	169.0
<i>Total</i>	28.9	185.2	9.6	223.7
Other labour costs	6.5	41.8	1.5	49.9
Royalties and fees paid(c)				
Authors	8.5	65.5	1.6	75.7
Artists, designers, illustrators	1.7	np	np	4.5
Editors	np	np	—	2.5
Publishers	np	1.2	np	1.6
Others	0.5	np	np	0.8
<i>Total</i>	13.0	70.2	1.8	85.0
Costs of printing				
In Australia	19.1	np	np	123.4
Overseas	9.4	np	np	123.3
<i>Total</i>	28.5	213.4	4.9	246.8
Landed cost of books imported(d)				
	23.8	np	np	211.0
Sales and marketing costs	7.8	88.9	2.3	99.1
Distribution costs(e)	11.0	81.1	1.5	93.6
Land taxes and land rates	0.2	np	np	1.7
Insurance premiums	0.6	3.0	0.1	3.6
Interest expenses	1.5	np	np	22.6
Depreciation and amortisation	1.8	21.6	1.6	25.0
Bad and doubtful debts	1.0	9.9	0.1	11.0
Computer software expensed	1.2	2.1	0.2	3.5
Other operating expenses	23.9	212.5	8.8	245.2
Total expenses	149.8	1 133.8	38.2	1 321.7

np not available for publication but included in totals where applicable, unless otherwise indicated

— nil or rounded to zero (including null cells)

(a) Includes only businesses for which the predominant activity is book publishing.

(b) Includes only the book publishing expenses of businesses for which the predominant activity is not book publishing, but book publishing income is \$2m or more.

(c) Excludes payments to own employees.

(d) Excludes costs included in the category 'Costs of printing overseas'.

(e) Includes customer service, warehousing, etc.

6

CAPITAL EXPENDITURE, By employment size

Capital expenditure item	BOOK PUBLISHERS(a)		OTHER MAJOR CONTRIBUTORS(b)	TOTAL BUSINESSES
	0-19 persons	20 or more persons		
	\$m	\$m	\$m	\$m
Computer equipment and software(c)	np	11.2	np	13.7
Other assets	np	17.2	np	19.6
Total	2.9	28.4	1.9	33.3

np not available for publication but included in totals where applicable, unless otherwise indicated

(a) Includes only businesses for which the predominant activity is book publishing.

(b) Includes only the book publishing capital expenditure of businesses for which the predominant activity is not book publishing, but book publishing income is \$2m or more.

(c) Includes equipment for desktop publishing.

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VALUE OF INVENTORIES, By employment size

Inventories	BOOK PUBLISHERS(a)		OTHER MAJOR CONTRIBUTORS(b)	TOTAL BUSINESSES
	0-19 persons	20 or more persons		
	\$m	\$m	\$m	\$m
Opening	32.8	250.4	2.9	286.1
Closing	42.2	263.9	3.2	309.3

(a) Includes only businesses for which the predominant activity is book publishing.

(b) Includes only the book publishing inventories of businesses for which the predominant activity is not book publishing, but book publishing income is \$2m or more.

EMPLOYMENT—at end of June 2001

	<i>Males</i>	<i>Females</i>	<i>Persons</i>
	no.	no.	no.
Book publishers(a)			
Working proprietors and partners	78	45	123
Employees			
Permanent			
Full-time	1 399	2 285	3 684
Part-time	np	np	304
Casual	np	np	610
<i>Total employees</i>	1 625	2 974	4 599
<i>Total employment</i>	1 703	3 019	4 722
Other major contributors(b)			
Working proprietors and partners	—	—	—
Employees			
Permanent			
Full-time	73	102	175
Part-time	np	np	14
Casual	np	np	63
<i>Total employees</i>	100	152	252
<i>Total employment</i>	100	152	252
Total businesses			
Working proprietors and partners	78	45	123
Employees			
Permanent			
Full-time	1 472	2 387	3 859
Part-time	78	240	318
Casual	175	498	673
<i>Total employees</i>	1 725	3 126	4 851
<i>Total employment</i>	1 803	3 171	4 974

np not available for publication but included in totals where applicable, unless otherwise indicated

— nil or rounded to zero (including null cells)

(a) Includes only businesses for which the predominant activity is book publishing.

(b) Includes only the book publishing employment of businesses for which the predominant activity is not book publishing, but book publishing income is \$2m or more.

DOMESTIC AND EXPORT SALES OF BOOKS(a), By category of book

<i>Category of book</i>	<i>Domestic sales</i>	<i>Export and re-export sales(b)</i>	<i>Total</i>
	\$m	\$m	\$m
Print			
Education			
Primary	90.7	35.6	126.3
Secondary	114.8	11.8	126.6
Tertiary	107.5	12.1	119.6
Professional and reference	104.6	16.9	114.5
<i>Total education</i>	417.6	69.4	487.0
General			
Hardback			
Nonfiction	124.1	15.7	139.8
Fiction	53.0	0.3	53.3
Children's	42.9	3.3	46.2
<i>Total hardback</i>	220.0	19.3	239.3
Trade paperback			
Nonfiction	164.2	58.0	222.2
Fiction	42.9	1.0	43.9
Children's	49.5	1.3	50.8
<i>Total trade paperback</i>	256.5	60.3	316.8
Mass-market paperback			
Nonfiction	62.9	6.7	69.6
Fiction	np	np	83.0
Children's	np	np	54.5
<i>Total mass-market paperback</i>	193.7	13.4	207.1
<i>Total general</i>	670.3	92.9	763.2
<i>Total print</i>	1 087.9	162.3	1 250.2
Electronic (including audio books)			
Education	np	np	3.9
General	np	np	6.5
<i>Total electronic</i>	10.3	*0.1	10.4
Total books	1 098.2	162.5	1 260.6

np not available for publication but included in totals where applicable, unless otherwise indicated

* estimate has a relative standard error of between 25% and 50% and should be used with caution

(a) Domestic and export sales of books includes all books whether published by the business or not.

(b) Includes re-export sales of \$6.6m and excludes sales of rights which totalled \$3.9m.

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EXPORT SALES OF BOOKS(a), By country or region of destination

	Percentage	
	Value	book sales
	\$m	%
United States of America	55.4	34.0
Canada	*4.4	*2.7
United Kingdom	23.1	14.3
New Zealand	26.8	16.5
Asia(b)	8.4	5.2
Papua New Guinea, Fiji and Pacific countries and territories	20.6	12.7
Other(c)	23.7	14.6
Total	162.5	100.0

* estimate has a relative standard error of between 25% and 50% and should be used with caution

(a) Includes re-exports of \$6.6m and excludes sales of rights which totalled \$3.9m.

(b) Asian markets most frequently specified were Singapore and Hong Kong.

(c) Other markets most frequently specified were Europe and South Africa.

11

SALES OF BOOKS, By method of sale

	VALUE OF SALES TO			Number of books sold million	Average per book \$
	The Trade(a)	The final consumer(b)	Total		
	\$m	\$m	\$m		
Australian titles					
Originated and published by the business	483.1	206.2	689.3	61.5	11.2
Originated by other publishers and co-published by the business	np	np	27.0	1.9	14.2
Distributed on behalf of other Australian publishers	np	np	31.4	2.9	10.9
Imported titles	440.8	72.0	512.9	38.0	13.5
Total	968.3	292.3	1 260.6	104.3	12.1

np not available for publication but included in totals where applicable, unless otherwise indicated

(a) 'The Trade' refers to businesses which intend to on-sell books, such as retailers.

(b) 'The final consumer' refers to individuals or organisations which are the end users of books.

12

SALES OF BOOKS, By type of title

<i>Type of title</i>	\$m	%
New(a)	666.9	52.9
Backlist(b)	593.7	47.1
Total	1 260.6	100.0

- (a) Titles published during the period covered by the survey.
- (b) All other titles.

13

SALES OF BOOKS, By origin of title and major category of book

<i>Origin of title</i>	<i>Education books</i> \$m	<i>General books</i> \$m	<i>Total</i> \$m
Australian titles			
Originated in Australia	309.1	400.9	710.0
Acquired from overseas under separate rights agreement	2.3	35.4	37.8
<i>Total Australian titles</i>	<i>311.4</i>	<i>436.3</i>	<i>747.7</i>
Imported titles	179.5	333.4	512.9
Total	490.9	769.7	1 260.6

	AUSTRALIAN(b)			IMPORTED		
	<i>Number of books sold</i>	<i>Value</i>	<i>Average selling price per book</i>	<i>Number of books sold</i>	<i>Value</i>	<i>Average selling price per book</i>
	million	\$m	\$	million	\$m	\$
Education						
Primary	11.9	76.3	6.4	1.8	29.5	16.0
Secondary	4.7	99.3	21.2	2.0	28.0	14.0
Tertiary	2.2	64.2	29.4	1.9	69.0	36.9
Professional and reference	2.3	56.1	24.0	2.0	52.0	26.2
<i>Total education</i>	<i>21.1</i>	<i>295.9</i>	<i>14.0</i>	<i>7.7</i>	<i>178.4</i>	<i>23.2</i>
General						
Hardback						
Nonfiction	5.9	91.6	15.6	2.1	39.1	18.2
Fiction	1.1	28.5	26.3	0.9	22.0	24.7
Children's	1.7	13.1	7.5	3.6	33.4	9.2
<i>Total hardback</i>	<i>8.7</i>	<i>133.2</i>	<i>15.3</i>	<i>6.7</i>	<i>94.5</i>	<i>14.2</i>
Trade paperback						
Nonfiction	12.1	138.7	11.4	5.4	72.6	13.5
Fiction	1.2	17.4	14.8	1.6	26.9	17.0
Children's	1.7	15.7	9.1	2.9	31.8	11.1
<i>Total trade paperback</i>	<i>15.0</i>	<i>171.8</i>	<i>11.4</i>	<i>9.8</i>	<i>131.3</i>	<i>13.3</i>
Mass-market paperback						
Nonfiction	np	30.9	np	2.7	30.3	11.1
Fiction	np	32.9	np	3.8	40.3	10.6
Children's	3.1	16.5	5.3	7.2	36.8	5.1
<i>Total mass-market paperback</i>	<i>16.5</i>	<i>80.3</i>	<i>4.9</i>	<i>13.7</i>	<i>107.4</i>	<i>7.8</i>
<i>Total general</i>	<i>40.2</i>	<i>385.2</i>	<i>9.6</i>	<i>30.2</i>	<i>333.2</i>	<i>11.0</i>
Total printed books	61.3	681.2	11.1	37.9	511.6	13.5

np not available for publication but included in totals where applicable, unless otherwise indicated

(a) Excludes electronic books.

(b) Includes books originated and published by the business. Excludes books originated by other businesses and co-published by the business. Excludes books distributed on behalf of other Australian publishers.

Category of title	0-19	20 or	Total
	persons	more persons	
	no.	no.	no.
Printed titles originated and published by the business			
Education			
Primary	200	1 682	1 881
Secondary	110	504	614
Tertiary	380	327	707
Professional and reference	403	271	675
Total education	1 094	2 784	3 877
General			
Hardback			
Nonfiction	143	252	395
Fiction	3	79	82
Children's	70	75	146
Total hardback	216	407	623
Trade paperback			
Nonfiction	441	464	905
Fiction	119	94	213
Children's	*125	116	240
Total trade paperback	684	674	1 358
Mass-market paperback			
Nonfiction	np	np	376
Fiction	np	np	930
Children's	**15	214	228
Total mass-market paperback	232	1 302	1 534
Total general	1 132	2 383	3 515
Total print titles	2 226	5 167	7 392
Electronic titles originated and published by the business	np	np	215
Titles originated by other publishers and co-published by the business	np	np	840
Total titles	2 475	5 972	8 447

* estimate has a relative standard error of between 25% and 50% and should be used with caution

np not available for publication but included in totals where applicable, unless otherwise indicated

** estimate has a relative standard error greater than 50% and is considered too unreliable for general use

(a) Titles published during the period covered by the survey.

		BOOK PUBLISHERS(a)		OTHER MAJOR CONTRIBUTORS(b)		TOTAL BUSINESSES	
		1999–2000(c)	2000–01	1999–2000(c)	2000–01	1999–2000(c)	2000–01
Number of books sold	million	128.1	103.0	1.3	1.3	129.4	104.3
Income							
Sales of all books							
Sales of Australian titles	\$m	723.3	715.0	32.8	32.7	756.1	747.7
Sales of imported titles	\$m	509.0	507.9	5.3	4.9	514.3	512.9
Total	\$m	1 232.3	1 223.0	38.1	37.7	1 270.4	1 260.6
Sales of other goods	\$m	28.1	29.6	—	—	28.1	29.6
Other income	\$m	60.1	69.7	0.4	1.3	60.4	71.1
Total	\$m	1 320.5	1 322.3	38.5	39.0	1 358.9	1 361.2
Average income per business	\$m	6.6	6.0	6.4	5.6	6.6	6.0
Expenses							
Wages and salaries	\$m	197.9	214.1	8.7	9.6	206.6	223.7
Royalties and fees	\$m	82.8	83.2	1.4	1.8	84.2	85.0
Other expenses	\$m	963.0	986.2	24.3	26.8	987.4	1 013.0
Total	\$m	1 243.7	1 283.5	34.4	38.2	1 278.1	1 321.7
Average expenses per business	\$m	6.2	5.8	5.7	5.5	6.2	5.8
Inventories							
Change in inventories	\$m	25.2	22.9	-0.9	0.3	24.8	23.1
Ratio of inventory to sales of all books	%	25.6	25.0	7.7	8.4	25.1	24.5
Employment							
Males	no.	1 716	1 703	99	100	1 815	1 803
Females	no.	3 342	3 019	141	152	3 483	3 171
Persons	no.	5 059	4 722	240	252	5 299	4 974
Average employment per business	no.	25	21	40	36	26	22
Other key aggregates							
Ratio of royalties and fees to sales of Australian titles	%	11.4	11.6	4.2	5.6	11.1	11.4
Export sales of books(d)	\$m	149.4	161.5	1.7	1.0	151.1	162.5
Internet sales of books	\$m	0.9	np	—	np	0.9	1.1
Operating profit before tax	\$m	102.0	61.6	3.6	1.0	105.6	62.7
Profit margin	%	7.7	4.7	9.3	2.7	7.8	4.6
Industry value added	\$m	381.5	367.6	15.8	14.4	397.3	382.0
Average wages and salaries per employee	\$'000	39.7	46.6	36.3	38.1	39.5	46.1
Number of businesses	no.	199	221	6	7	205	228

— nil or rounded to zero (including null cells)

np not available for publication but included in totals where applicable, unless otherwise indicated

(a) Includes only businesses for which the predominant activity is book publishing.

(b) Includes only the book publishing activity of businesses for which the predominant activity is not book publishing, but book publishing income is \$2m or more.

(c) Data for 1999–2000 have been revised (see paragraph 18 in the Explanatory Notes).

(d) Includes re-export sales and excludes sales of rights.

SELECTED AGGREGATES, Historical comparisons

		1994(a)	1995-96	1997-98	1999-00(b)	2000-01
Number of books sold	million	124.8	130.6	111.5	129.4	104.3
Sales of all books	\$m	841.7	950.0	1 035.6	1 270.4	1 260.6
Sales of Australian titles	\$m	487.7	561.1	623.5	756.1	747.7
Sales of imported titles	\$m	354.0	388.9	412.1	514.3	512.9
Export sales of books(c)	\$m	81.1	80.3	109.8	151.1	162.5

(a) Data were collected on a calendar year basis in 1994.

(b) Data for 1999-2000 have been revised (see paragraph 18 in the Explanatory Notes).

(c) Includes re-export sales and excludes sales of rights.

EXPLANATORY NOTES

SCOPE AND COVERAGE

1 The scope of the 2000–01 Book Publishers Survey was all businesses in Australia which had book publishing as their predominant activity, and those businesses which had significant levels of book publishing activity despite being predominantly involved in another activity. Book publishing activity was deemed to be significant if it contributed \$2m or more to business income. Sales of imported books were included as part of book publishing activity.

2 The list of businesses covered by the collection was derived from three sources. The main source was all businesses recorded on the ABS Business Register with a predominant activity of Book and Other Publishing (Australian and New Zealand Standard Industrial Classification Class 2423). A supplementary source was all members of the Australian Publishers Association not already identified from the previous source. A further supplementary source was all businesses recorded as book publishers in *The Australian Writer's Marketplace 2001* (Bookman Press 2001) but not already identified from the other two sources.

3 A sample of businesses which was sourced from the ABS Business Register was contacted in relation to this survey. In contrast, contact was made with all businesses which were obtained from either the Australian Publishers Association membership list or *The Australian Writer's Marketplace 2001*.

4 In total there were 228 businesses found to be within the scope of the collection (as defined above). Data were obtained from all of the 7 businesses predominantly involved in another activity but with \$2m or more in income from book publishing. In contrast, data were obtained from a sample of those 221 businesses predominantly involved in book publishing. That is, a sample of 164 businesses were selected; their responses have been weighted to represent the 221 businesses in the book publishing industry.

5 For businesses predominantly involved in book publishing, data for their entire operations were included in the survey results with one exception. The one exception is a book publisher that had very high levels of non-book publishing activity; in this case, only data in respect of this business' book publishing activity were included. For businesses predominantly involved in another activity, only data in respect of their book publishing activity were included. Businesses were asked to report on their Australian-based activities, i.e. domestic operations, exports of goods or services from Australia and imports of goods or services into Australia.

STATISTICAL UNIT

6 The unit from which data were collected was the management unit. In nearly all cases the management unit coincides with the legal entity owning the business. For a small number of large businesses, the management unit coincides with a 'division' or 'line of business'.

INTERPRETATION OF DATA

7 If a book is available in more than one format, then each version is treated as a separate title. For example, if a book were available in hardback, mass-market paperback and electronically, and all were published during the reference period, these would count as three separate titles for the purposes of table 15. However, if the hardback version had been published before the reference period it would not be included in table 15. Further, in this case, its sales would be categorised as sales of backlist in table 12, whereas sales of the other two versions would be categorised as sales of new titles.

EXPLANATORY NOTES *continued*

RELIABILITY OF DATA

8 The estimates in this publication are based on information obtained from a sample of businesses. Consequently, these estimates are subject to sampling variability. That is, they may differ from the figures that would have been obtained if the survey had included all in-scope businesses. One measure of the likely difference is given by the standard error (SE), which indicates the extent to which an estimate might have varied by chance because information was collected from only a sample of businesses.

9 There are about 2 chances in 3 that a sample estimate will differ by less than one SE from the figure that would have been obtained if all businesses in the population had been included in the survey, and approximately 19 chances in 20 that the difference will be less than two SEs.

10 Sampling variability can be measured by using the relative standard error (RSE) which is obtained by expressing the SE as a percentage of the estimate to which it refers. The RSE is a useful measure in that it provides an immediate indication of the percentage errors likely to have occurred due to sampling and hence does not require reference to the size of the estimate.

11 The following table shows the RSEs for a selection of the statistics presented in this publication.

EXPLANATORY NOTES *continued*

RELIABILITY OF DATA *continued*

RELATIVE STANDARD ERRORS, For table 16—Key aggregates,
Total

	1999–2000	2000–01
	%	%
Number of books sold	7.6	5.9
Income		
Sales of all books		
Sales of Australian titles	6.4	4.2
Sales of imported titles	8.8	7.0
<i>Total</i>	6.7	4.8
Sales of other goods	9.4	5.0
Other income	10.1	7.5
<i>Total</i>	6.6	4.7
Average income per business	8.3	6.8
Expenses		
Wages and salaries	6.5	4.5
Royalties and fees	8.3	5.7
Other expenses	6.6	4.8
<i>Total</i>	6.6	4.7
Average expenses per business	8.2	6.8
Inventories		
Change in inventories	24.7	17.9
Ratio of inventory to sales of all books	4.5	3.1
Employment		
Males	6.8	4.4
Females	5.7	4.2
<i>Persons</i>	5.9	4.2
Average employment per business	7.6	6.2
Other key aggregates		
Ratio of royalties and fees to sales of Australian titles	5.4	3.4
Export sales of books	16.5	8.6
Internet sales of books	16.4	8.5
Operating profit before tax	10.3	10.3
Profit margin	6.0	9.3
Industry value added	7.0	4.6
Average wages and salaries per employee	1.2	1.0
Number of businesses	6.1	5.3

12 As an example, the estimate of total income for book publishers and other major contributors for 2000–01 is \$1,361.2m and the RSE is 4.7%, giving a SE of \$64.0m. Therefore, there are 2 chances in 3 that, if all businesses in the population had been included in the survey, a figure in the range of \$1,297.2m to \$1,425.2m would have been obtained, and 19 chances in 20 (i.e. a confidence interval of 95%) that the figure would have been within the range of \$1,233.2m to \$1,489.2m.

13 Although the table above shows the RSEs for only a selection of the statistics presented in this publication, they have been calculated for all of the statistics and are available on request. Estimates with high RSEs have been marked with asterisks in the tables in which they occur. If an estimate has an RSE between 25% and 50%, it is marked with one asterisk and should be used with caution. If it has an RSE greater than 50%, it is marked with two asterisks and is considered too unreliable for general use.

EXPLANATORY NOTES *continued*

RELIABILITY OF DATA *continued*

14 Errors other than those due to sampling may occur because of deficiencies in the coverage of the collection, imperfections in reporting by respondents or non-response. Inaccuracies of this kind are referred to as non-sampling errors and they may occur in any collection, whether it be a census or a sample survey. Every effort is made to reduce non-sampling error to a minimum by careful design and testing of questionnaires, efficient operating procedures and systems, and appropriate methodology.

COMPARISON WITH PREVIOUS DATA

15 The Book Publishers Survey was previously conducted in respect of 1994, 1995–96, 1997–98 and 1999–2000. As for the 2000–01 survey, businesses included in the earlier surveys were either predominantly involved in book publishing or undertook a significant amount of book publishing activity. However, prior to the 1999–2000 survey, the amount of book publishing activity considered to be significant was not defined. This led to some inconsistencies when determining which businesses should be included. Other inconsistencies in the treatment of businesses not predominantly involved in book publishing meant that non-book publishing activity was included in the results for some of these businesses but not for others. From 1999–2000, changes were introduced both to refine the definition of businesses in scope of the survey, and to reduce the amount of non-book publishing activity included for those not predominantly involved in book publishing. It should be noted that the changes have affected the comparability of some data items with surveys prior to 1999–2000. This is discussed more fully below.

16 For the 1999–2000 survey, a clearly defined level of significant activity was introduced to ensure comparisons with future surveys could be undertaken on a consistent basis. Specifically, significant activity was defined as book publishing income of \$2m or more. Hence businesses which were not predominantly book publishers and had less than \$2m of book publishing income were considered to be out of scope of the collection. By imposing this limit, a small number of book publishers were excluded from the 1999–2000 survey that would have been included if the process used in earlier years had been repeated. Nevertheless, this change is likely to have had little impact on the level of reported book publishing in Australia. For example, if the \$2m limit had been utilised in 1997–98, the impact would have been a reduction in the reported total sales of books of just 0.4%.

17 For surveys prior to 1999–2000, data were collected for all of the activity of some businesses which were significantly, but not predominantly, involved in book publishing. This meant that the non-book publishing activity of these businesses was included. From 1999–2000, only the book publishing activity of these businesses is included in the survey results. This has affected several data items, in particular the 'Sales of all other goods' category, which is substantially lower than it was for surveys prior to 1999–2000. The exclusion of data regarding the sales of all other goods, which represented 12% of total income in 1997–98, is reflected in other data items such as expenses, inventories, employment, profit margin and industry value added which, in the past, included the contribution of non-book publishing activity. Data items which relate only to books such as the number and value of books sold, the sales of Australian and imported titles, and the export sales of books should not be affected and therefore can be compared over time using the results from 2000–01 and earlier surveys (see table 17).

REVISIONS TO 1999–2000 DATA

18 The data for 1999–2000 have been revised to include corrections to figures previously reported by businesses to the ABS. These revisions are reflected in the 1999–2000 data presented in tables 16 and 17.

EXPLANATORY NOTES *continued*

CHANGES IN NEXT ISSUE

19 In April 2000, the ABS released an *Information Paper: ABS Statistics and The New Tax System* (cat. no. 1358.0), which foreshadowed changes in the statistical infrastructure supporting the compilation of ABS economic series. The changes will allow better use of data available from the taxation system to improve efficiency, coverage and sample design.

20 This publication presents the last release of estimates from the Book Publishers Survey compiled using the former infrastructure.

21 In the next release of this publication, estimates for 2001–02 will be compiled on the new basis. To facilitate comparisons over time, the data presented for 1999–2000 and 2000–01 will be adjusted so that all estimates are presented in that release on the new basis.

22 An *Information Paper: Improvements in ABS Economic Statistics [Arising from The New Tax System]* (cat. no. 1372.0), was released on 6 May 2002. That paper described the changes in more detail and provided information about the treatment of statistical impacts of the changes across ABS economic series.

RELATED PUBLICATIONS

23 ABS publications which may be of interest include:

Book Publishers, Australia, 1999–2000 cat. no. 1363.0

Manufacturing Industry, Australia, 1999–2000 cat. no. 8221.0

Manufacturing Industry, Australia, Preliminary, 2000–01 cat. no. 8201.0

24 Current publications produced by the ABS are listed in the *Catalogue of Publications and Products* (cat. no. 1101.0). The catalogue is available from any ABS office or the ABS web site <<http://www.abs.gov.au>>. The ABS also issues a daily Release Advice on the web site which details products to be released in the week ahead.

25 Detailed information from earlier Book Publishers Surveys for 1994, 1995–96 and 1997–98 is contained in a series of publications produced by the Department of Communications, Information Technology and the Arts entitled *Cultural Trends in Australia, Australian Book Publishing*. Refer to paragraphs 14 to 16 above regarding comparability of data.

ABS DATA AVAILABLE ON REQUEST

26 As well as the statistics included in this and related publications, the ABS may have other relevant data available. Inquiries about such data should be made to the contact person noted in the Inquiries box on the Contents page.

ACKNOWLEDGEMENT

27 ABS publications draw extensively on information provided freely by individuals, businesses, governments and other organisations. Their continued cooperation is very much appreciated. Without it, the wide range of statistics published by the ABS would not be available. Information received by the ABS is treated in strict confidence as required by the *Census and Statistics Act 1905*.

GLOSSARY

Audio book	A book which is made available in the form of a recording of someone reading the text. For the purposes of this publication, audio books are included in the electronic books category.
Australian title	A book that has an Australian International Standard Book Number as a result of being either originated (but not necessarily printed) in Australia, or acquired under a separate rights agreement for the Australian market by an Australian-based business.
Backlist title	A title published prior to the period covered by the survey.
Book publishers	Businesses which had book publishing as their predominant activity.
Capital expenditure	Outlays on capital equipment and other capital assets, including all costs capitalised in the account books of a business, e.g. legal fees, real estate transfer costs and assets acquired under finance leases.
Casual employees	Employees who are not entitled to paid holidays or paid sick leave days.
Closing inventories	Inventories of materials, finished goods and work-in-progress held at the end of the reference period.
Copyright Agency Limited income	Licence fees collected on behalf of copyright holders by Copyright Agency Limited from entities it has licensed to copy printed works. These fees are then distributed annually to members of Copyright Agency Limited on the basis of its records of the copying being carried out by licensees.
Educational Lending Right income	Payments made from a Commonwealth Government cultural program to eligible Australian authors and book publishers on the basis that they lose income because of the availability of their books for loan in educational lending libraries.
Educational book	A book which is authored with the intention of it being suitable for use as an aid to formal teaching at the primary, secondary or tertiary level. Reference books and books for use by professionals are also included in this category.
Electronic book	A book which is made available in an electronic format. This may be in the form of a computer file delivered via the Internet or as a CD-ROM, floppy disk or other data media. The text of these books must be read from a computer screen or special hand-held electronic device. For the purposes of this publication, the electronic books category includes audio books.
Employment	Includes working proprietors and working partners of unincorporated businesses, working directors of incorporated companies and trusts, and all employees working for businesses during the last pay period ending in June 2001.
Full-time employees	Employees who work 35 hours per week or more.
General book	A book not authored specifically for educational use.
Hardback	A book with a hard cover. If a book is first published as a hardback, it may later be published in paperback format for the mass market.
Industry value added	The value added to the economy by the industry. It is equal to the sales of goods and services plus government subsidies and changes in the levels of trading inventories, minus purchases and other selected expenses.
Internet sales	Sales for which the order was placed through the Internet.
Mass-market paperback	The conventional form of paperback book. A book published as a mass-market paperback may have been previously published in a different format (e.g. hardback).
New title	A title published during the period covered by the survey.

GLOSSARY *continued*

Opening inventories	Inventories of materials, finished goods and work-in-progress held at the beginning of the reference period.
Operating profit before tax	This item is a measure of profit (or loss) before extraordinary items are brought to account and prior to the deduction of income tax and appropriation to owners. It is derived as total income minus total expenses plus closing inventories minus opening inventories (see separate entries in the Glossary for these components).
Other major contributors	Businesses which had \$2m or more of book publishing activity despite being predominantly involved in another activity.
Part-time employees	Employees who work less than 35 hours per week.
Permanent employees	Employees who are entitled to paid holidays and paid sick leave days.
Profit margin	Operating profit before tax as a percentage of total income.
Public Lending Right income	Payments made from a Commonwealth Government cultural program to eligible Australian authors and book publishers on the basis that they lose income because of the availability of their books for loan in public lending libraries.
Re-exports	Exports from Australia of books originally imported into Australia by the publisher.
Rights	Permissions to use an author's work in different ways, such as publish it in foreign countries, publish it in magazines, broadcast it on radio or make it into a motion picture.
The final consumer	Individuals or organisations such as libraries which are the end users of books.
The trade	Businesses such as book distributors, book clubs, education and library suppliers, and other retailers which on-sell books to other individuals or organisations.
Total expenses	Sum of expense items including wages and salaries, other labour costs, royalties and fees paid, costs of printing, landed costs of books imported, sales and marketing costs, distribution costs, land taxes and land rates, insurance premiums, interest expenses, depreciation and amortisation, bad and doubtful debts, computer software expensed and all other expenses not excluded. Expenses excluded are extraordinary items, export freight charges, excise duty, dividends, income and other direct taxes, costs associated with the transfer of real estate, unrealised gains/losses from revaluation of assets, change in inventories, donations, capital repayments and Goods and Services Tax where this is recoverable as an input tax credit.
Total income	Sum of all income items, i.e. sales of books, sales of other products, receipts from royalties, sales of rights, government grants and subsidies, Public Lending Right receipts, Copyright Agency Limited receipts and any other sources of income, with the exception of extraordinary items which are excluded.
Trade paperback	An alternative format to hardback which has the same dimensions as the equivalent hardback, but with a soft cover. A book which is first published as a trade paperback may later also be published as a conventional (mass-market) paperback

FOR MORE INFORMATION...

- INTERNET* **www.abs.gov.au** the ABS web site is the best place to start for access to summary data from our latest publications, information about the ABS, advice about upcoming releases, our catalogue, and Australia Now—a statistical profile.
- LIBRARY* A range of ABS publications is available from public and tertiary libraries Australia-wide. Contact your nearest library to determine whether it has the ABS statistics you require, or visit our web site for a list of libraries.
- CPI INFOLINE* For current and historical Consumer Price Index data, call 1902 981 074 (call cost 77c per minute).
- DIAL-A-STATISTIC* For the latest figures for National Accounts, Balance of Payments, Labour Force, Average Weekly Earnings, Estimated Resident Population and the Consumer Price Index call 1900 986 400 (call cost 77c per minute).

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