

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 Tammie Davis on Adelaide (08) 8237 7329.

NOTES

ABOUT THIS PUBLICATION

This publication presents the results from the 2002–03, 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, 2000–01 and 2001–02 and key data from the latest survey is included in this publication for comparative purposes. While similar surveys were also conducted in respect of 1994, 1995–96 and 1997–98 some refinements to the most recent surveys (see paragraphs 22 to 23 of the Explanatory Notes) limit the comparability of data across all years. Comparisons can be made for the number and value of books sold for all years and 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
ABN	Australian Business Number
ABS	Australian Bureau of Statistics
ATO	Australian Taxation Office
IVA	industry value added
RSE	relative standard error
SE	standard error
TAU	type of activity unit
USA	United States of America

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SUMMARY OF FINDINGS

INTRODUCTION

This publication presents data, in respect of 2002–03, 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). For other major contributors this publication only includes data for their book publishing activity.

OVERVIEW

For 2002–03, 236 businesses were identified as book publishers while a further 10 were other major contributors. These 246 businesses sold a total of 114.4 million books, primarily to book retailers, earning income of \$1,369.4m. With a total income of \$1,578.6m, expenses of \$1,487.7m and a reduction in inventories of \$2.5m, the overall operating profit before tax of these businesses was \$88.4m (table 1).

The 20 largest book publishers (in terms of income) generated 74% (\$1,171.2m) of the total income for book publishers and other major contributors. Similarly, the 20 largest book publishers achieved 76% (\$1,036.5m) of the value of total book sales and sold 77% (88.0 million) of all books. Their share of the total expenses was 75% (\$1,115.1m) (table 1).

Book publishers and other major contributors reported an average profit margin of 5.6%. For the largest 20 book publishers, the profit margin was 4.4%. For other book publishers, the profit margin was 10.2% while other major contributors had a profit margin of 2.0% for their book publishing activity. The 20 largest book publishers contributed \$303.9m to industry value added (IVA), which is a measure of the value which an industry adds to the overall economy. This was 68% of the total IVA for book publishing activity (table 1).

At the end of June 2003, book publishers and other major contributors employed 5,340 people, 3,552 (67%) of whom worked for the 20 largest book publishers (table 1).

INCOME

Sales of books contributed \$1,369.4m (87%) to the total income of book publishers and other major contributors. This included an amount of \$492.4m for the sales of imported titles. Sales of other goods (\$73.9m) by book publishers was the second highest contributor to total income, followed by income from services (\$66.3m) (table 4).

EXPENSES

The major components of total expenses (\$1,487.7m) were printing costs, wages and salaries, and the cost of imported books. Printing costs accounted for \$278.3m or 19% of total expenses, with printing in Australia comprising \$144.7m and overseas \$133.6m. Wages and salaries contributed \$248.6m (17%) to total expenses while another \$54.3m was spent on other labour costs. Businesses spent \$243.6m (16%) on imported books (table 5).

METHOD OF SALE

The majority of book sales (76% or \$1,039.7m) were to retailers and other book distributors for on-selling to individuals and organisations. The remaining sales (24% or \$329.7m) were transacted directly with the final consumer (table 11). An estimated \$14.1m (1%) of total book sales were made through the Internet (table 1).

SUMMARY OF FINDINGS *continued*

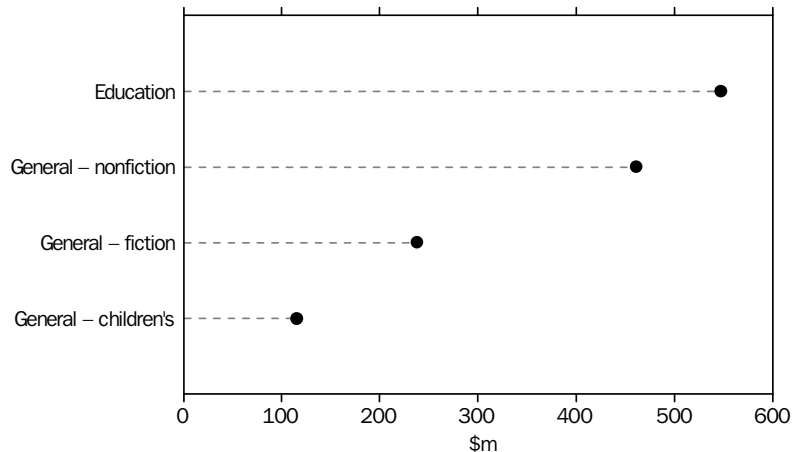
SALES OF BOOKS BY CATEGORY

Of the 246 businesses identified as book publishers and other major contributors, 141 were involved mainly in publishing books of general content while the remainder were predominantly publishing educational books (including professional and reference books) (table 3).

Book publishers and other major contributors sold \$814.5m worth of printed books of general content covering nonfiction (\$461.2m or 57%), fiction (\$237.6m or 29%) and children's books (\$115.6m or 14%). A further \$547.8m worth of sales were for printed educational books while sales of electronic books (which includes audio books) totalled \$7.1m (table 9).

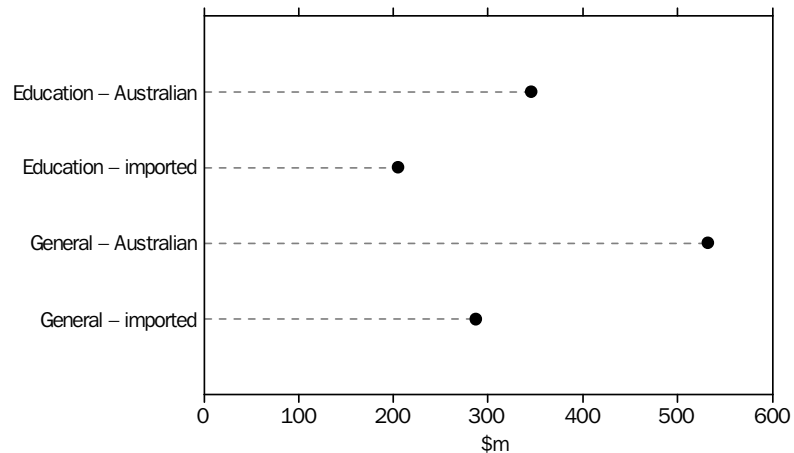
Many books are published as a hardback or trade paperback before being reissued as a mass-market paperback. The value of sales of general trade paperback books was \$316.8m, compared with sales of general hardback books of \$293.8m and general mass-market paperback books of \$203.8m (table 9).

SALES OF PRINTED BOOKS BY CATEGORY



New titles accounted for approximately one-half of total book sales (\$679.8m or 50%) (table 12). Australian titles comprised 64% (\$877.0m) of total book sales and 63% (\$345.1m) of educational book sales. Of all sales of Australian titles \$843.6m (96%) originated in Australia, while the remaining 4% (\$33.4m) were acquired from overseas under separate rights agreements (table 13).

SALES OF BOOKS BY CATEGORY AND ORIGIN OF TITLE



SUMMARY OF FINDINGS *continued*

SALES OF AUSTRALIAN AND IMPORTED BOOKS

There were 71.2 million printed books sold which were originated and published by Australian book publishers and other major contributors. These books generated income of \$801.5m, giving an overall average selling price for Australian originated books of \$11.25 per book. Of such books, tertiary education books had the highest average selling price (\$27.80) (table 14).

There were 36.7 million imported printed books sold by Australian book publishers and other major contributors, earning income of \$491.1m and an overall average selling price per book of \$13.39. Tertiary education books were again the most expensive on average (\$30.46) while children's mass-market paperbacks were the cheapest (\$6.01) (table 14).

Sales of Australian originated titles to book retailers, other distributors and to final consumers generated more income than the sales of imported titles. Income from printed educational books, originated and published by Australian book publishers and other major contributors, was \$328.4m, 60% more than the income from imported (\$205.3m). For non-fiction books, income from Australian originated publications (\$311.6m) were 138% higher than the equivalent figure for imports (\$130.8m). Income from Australian originated fiction books were 31% higher at \$118.5m, compared with \$90.2m for imported fiction. For children's books, however, income earned from the sales of imports exceeded those of Australian originated publications. The income from children's books were \$64.9m, compared with \$42.9m from the Australian originated product (table 14).

NEW AUSTRALIAN TITLES PUBLISHED

There were 8,553 new Australian titles published during 2002–03 of which 8,310 (97%) were printed titles originated by Australian book publishers and other major contributors. Over one-half of these printed titles (56% or 4,615) were educational. Of the 3,694 general-content titles, 49% were trade paperbacks, 36% were mass-market paperbacks and the remaining 14% were hardbacks (table 15).

EXPORTS

Export sales of books amounted to \$209.5m or 15% of total book sales. Re-exports contributed \$7.4m 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 \$81.8m which was over one-third (39%) of the total value of exports. Other significant markets were New Zealand (\$44.5m) and the United Kingdom (\$30.7m).

The total sales of rights to businesses in other countries was \$4.6m (table 10).

EMPLOYMENT

At the last pay period ending June 2003, book publishers and other major contributors had a total employment of 5,340 people (employment numbers for other major contributors refers only to their book publishing activity). Of these, 1,783 were males and 3,556 were females. Of the 5,340 people, the majority (3,972 or 74%) were full-time permanent employees. An additional 372 people (7%) were employed permanently on a part-time basis, 810 people (15%) were employed as casuals and 184 (3%) were working proprietors and partners (table 8).

SUMMARY OF FINDINGS *continued*

STATE AND TERRITORY DATA

In 2002–03, book publishers and other major contributors that were based, or had their head office, in New South Wales accounted for 55% (\$759.0m) of total books sales. Victoria's contribution was 38% (\$525.8m) of total book sales (table 2).

CHANGES OVER TIME

A comparison of survey data for 2001–02 and 2002–03 shows significant change in only a few of the data items. The value of the operating profit before tax increased by 76% (\$38.2m) from \$50.2m in 2001–02 to \$88.4m in 2002–03. The profit margin increased over the same period by 2.3 percentage points from 3.3 percent in 2001–02 to 5.6 percent in 2002–03.

Small changes between 2001–02 and 2002–03, although not significant, were also evident for estimates of the total number of books sold (a 12% decrease to 114.4 million books in 2002–03), income from the sale of books (a 1% increase to \$1,369.4m) and total expenses (a 2% increase to \$1,487.7m) (table 16).

Several data items are comparable across the seven collection periods since the survey began in 1994 (see paragraphs 22 to 23 of the Explanatory Notes). The sales of Australian titles has been growing since 2000–01, while the sales of imported titles has been declining since 1999–2000. Generally, the value of export sales of books has steadily increased over the years; export sales on books in 2002–03 (\$209.5m) were 158% higher than 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	88.0	24.6	112.6	1.8	114.4
Income						
Sales of all books						
Sales of Australian titles	\$m	611.3	220.5	831.8	45.2	877.0
Sales of imported titles	\$m	425.2	55.7	480.9	11.5	492.4
<i>Total</i>	\$m	1 036.5	276.2	1 312.7	56.7	1 369.4
Sales of other goods	\$m	53.9	20.0	73.9	—	73.9
Other income	\$m	80.8	51.5	132.3	3.0	135.3
<i>Total</i>	\$m	1 171.2	347.7	1 518.9	59.7	1 578.6
Average income per business	\$m	58.6	1.6	6.4	6.0	6.4
Expenses						
Wages and salaries	\$m	173.4	58.6	232.1	16.5	248.6
Royalties and fees	\$m	72.6	27.5	100.1	2.2	102.3
Other expenses	\$m	869.1	227.9	1 097.1	39.8	1 136.8
<i>Total</i>	\$m	1 115.1	314.1	1 429.2	58.4	1 487.7
Average expenses per business	\$m	55.8	1.5	6.1	5.8	6.0
Inventories						
Change in inventories	\$m	-4.2	**1.8	-2.5	—	-2.5
Ratio of inventory to sales of all books	%	20.2	18.8	19.9	6.4	19.4
Employment						
Males	no.	1 131	522	1 653	130	1 783
Females	no.	2 421	941	3 362	194	3 556
<i>Persons</i>	no.	3 552	1 463	5 015	325	5 340
Average employment per business	no.	178	7	21	33	22
Other key aggregates						
Ratio of royalties and fees to sales of Australian titles	%	11.9	12.5	12.0	4.9	11.7
Export sales of books(d)	\$m	152.7	53.6	206.3	3.2	209.5
Internet sales of books	\$m	0.9	**12.2	**13.0	1.1	**14.1
Operating profit before tax	\$m	51.9	35.4	87.2	1.2	88.4
Profit margin	%	4.4	10.2	5.7	2.0	5.6
Industry value added	\$m	303.9	115.3	419.3	25.1	444.3
Average wages and salaries per employee	\$'000	48.9	48.1	48.0	50.7	48.2
Number of businesses	no.	20	216	236	10	246

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

— 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 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 \$7.4m and excludes sales of rights which totalled \$4.6m.

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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	759.0	149.1	908.1
Victoria	525.8	39.2	564.9
Queensland	66.4	*15.2	81.6
Western Australia	8.6	4.2	12.8
Other states and territories	9.6	1.5	11.2
Australia	1 369.4	209.2	1 578.6

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

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

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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	394.7	143.7	92.0	948.1	1 578.6
Total expenses	\$m	353.2	140.5	90.9	903.1	1 487.7
Change in inventories	\$m	-1.1	2.0	**0.2	-3.6	-2.5
Operating profit before tax	\$m	40.4	*5.2	**1.3	41.4	88.4
Profit margin	%	10.2	**3.6	**1.4	4.4	5.6
Number of businesses	no.	52	15	*38	141	246

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

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

(a) Each business is classified according to whether its book sales are predominately: primary and secondary education; tertiary education; professional and reference; or general (fiction, nonfiction or children's).

(b) Includes any businesses predominately selling electronic books.

COMPONENTS OF INCOME, By employment size(a)

	BOOK PUBLISHERS(b)		OTHER MAJOR CONTRIBUTORS(c)	TOTAL BUSINESSES
	0-19 persons	20 or more persons		
	\$m	\$m	\$m	\$m
Sales of books (d)				
Australian titles				
Originated and published by the business	108.8	651.2	45.1	805.2
Originated by other publishers and co-published by the business	np	np	—	23.9
Distributed on behalf of other Australian publishers	np	np	—	48.0
Imported titles	13.2	467.7	11.5	492.4
<i>Total</i>	<i>123.0</i>	<i>1 189.8</i>	<i>56.7</i>	<i>1 369.4</i>
Sales of other goods	**13.1	60.7	—	73.9
Other sources of Income				
Income from royalties and sales of rights	np	9.9	np	23.8
Funding from Federal, State and/or local government (e)	*2.2	0.2	—	*2.4
Public Lending Right income	0.2	0.7	—	0.9
Copyright Agency Limited income	np	5.1	np	6.0
Education Lending Right income	0.1	0.6	—	0.7
Income from services	3.8	62.1	0.4	66.3
Other income	1.5	33.1	0.6	35.2
<i>Total</i>	<i>20.6</i>	<i>111.7</i>	<i>3.0</i>	<i>135.3</i>
Total income	156.7	1 362.2	59.7	1 578.6

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

— nil or rounded to zero (including null cells)

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

(a) Of the 246 businesses included in the survey, there were 236 book publishers and 10 other major contributors. Of the book publishers, 37 employed 20 or more persons while 199 employed less than 20 persons as of June 2003.

(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.

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	*0.6	8.4	0.6	9.6
Editors	3.9	16.4	4.0	24.2
Publishers	*2.6	11.1	0.8	14.5
Typesetters	0.7	1.5	—	2.3
Other	15.3	171.5	11.1	198.0
<i>Total</i>	23.1	209.0	16.5	248.6
Other labour costs	4.0	47.1	3.2	54.3
Royalties and fees paid(c)				
Authors	np	73.1	np	85.7
Artists, designers, illustrators	*1.6	3.2	—	4.8
Editors	1.0	np	np	1.6
Publishers	0.3	8.9	—	9.2
Others	np	np	—	0.9
<i>Total</i>	*13.8	86.3	2.2	102.3
Costs of printing				
In Australia	*26.3	111.6	6.8	144.7
Overseas	np	112.2	np	133.6
<i>Total</i>	*47.1	223.7	7.5	278.3
Landed cost of books imported(d)				
imported(d)	9.1	228.0	6.5	243.6
Sales and marketing costs	**11.9	85.1	2.6	99.6
Distribution costs(e)	6.4	76.6	2.4	85.4
Land taxes and land rates	np	np	—	3.6
Insurance premiums	0.7	4.5	0.2	5.4
Interest expenses	0.4	24.2	1.8	26.5
Depreciation and amortisation	1.7	29.7	2.5	33.9
Bad and doubtful debts	np	np	np	15.1
Computer software expensed	*0.6	3.0	0.2	3.8
Other operating expenses	17.6	256.8	12.8	287.3
Total expenses	139.4	1 289.8	58.4	1 487.7

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

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

— nil or rounded to zero (including null cells)

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(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.

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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)	*1.2	17.9	0.8	19.9
Other assets	*2.4	11.5	1.4	15.3
Total	*3.6	29.4	2.1	35.1

* estimate has a relative standard error of 25% to 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 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	27.1	236.8	3.7	267.6
Closing	30.5	230.9	3.6	265.1

(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.

	<i>Males</i>	<i>Females</i>	<i>Persons</i>
	no.	no.	no.
Book publishers(a)			
Working proprietors and partners	92	92	184
Employees			
Permanent			
Full-time	1 338	2 403	3 741
Part-time	np	np	350
Casual	np	np	739
<i>Total employees</i>	1 561	3 270	4 831
<i>Total employment</i>	1 653	3 362	5 015
Other major contributors(b)			
Working proprietors and partners	—	—	—
Employees			
Permanent			
Full-time	97	134	231
Part-time	np	np	22
Casual	np	np	71
<i>Total employees</i>	130	194	325
<i>Total employment</i>	130	194	325
Total businesses			
Working proprietors and partners	92	92	184
Employees			
Permanent			
Full-time	1 435	2 537	3 972
Part-time	49	323	372
Casual	206	604	810
<i>Total employees</i>	1 691	3 464	5 156
<i>Total employment</i>	1 783	3 556	5 340

— 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 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	132.5	53.8	186.3
Secondary	101.1	6.0	107.2
Tertiary	132.9	10.5	143.4
Professional and reference	93.4	*17.5	110.9
<i>Total education</i>	459.9	87.8	547.8
General			
Hardback			
Nonfiction	133.4	*25.9	159.3
Fiction	81.3	4.6	85.9
Children's	43.0	5.6	48.6
<i>Total hardback</i>	257.7	36.1	293.8
Trade paperback			
Nonfiction	153.7	*67.5	221.2
Fiction	68.3	1.6	69.8
Children's	21.8	*4.0	25.8
<i>Total trade paperback</i>	243.8	*73.0	316.8
Mass-market paperback			
Nonfiction	77.5	3.3	80.7
Fiction	77.4	4.5	81.9
Children's	36.5	4.7	41.2
<i>Total mass-market paperback</i>	191.4	12.5	203.8
<i>Total general</i>	692.9	121.6	814.5
<i>Total print</i>	1 152.8	209.4	1 362.3
Electronic (including audio books)			
Education	np	np	2.7
General	np	np	4.4
<i>Total electronic</i>	7.0	0.1	7.1
Total books	1 159.8	209.5	1 369.4

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

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

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

(b) Includes re-export sales of \$7.4m and excludes sales of rights which totalled \$4.6m.

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

	Value	Percentage book sales
	\$m	%
United States of America	81.8	39.0
Canada	3.9	1.9
United Kingdom	30.7	14.6
New Zealand	44.5	21.2
Asia(b)	16.1	7.7
Papua New Guinea, Fiji and Pacific countries and territories	2.5	1.2
Other	30.1	14.4
Total	209.5	100.0

(a) Includes re-exports of \$7.4m and excludes sales of rights which totalled \$4.6m.

(b) The most frequently specified Asian market was Singapore.

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SALES OF BOOKS, By method of sale

	VALUE OF SALES TO			Number of books sold million	Average per book \$
	The Trade(a) \$m	The final consumer(b) \$m	Total \$m		
Australian titles					
Originated and published by the business	571.6	233.5	805.2	71.3	11.29
Originated by other publishers and co-published by the business	np	np	23.9	1.3	18.14
Distributed on behalf of other Australian publishers	np	np	48.0	4.6	10.45
Imported titles	415.5	76.9	492.4	37.2	13.25
Total	1 039.7	329.7	1 369.4	114.4	11.97

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.

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SALES OF BOOKS, By type of title

<i>Type of title</i>	\$m	%
New(a)	679.8	49.6
Backlist(b)	689.6	50.4
Total	1 369.4	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>	<i>General books</i>	<i>Total</i>
	\$m	\$m	\$m
Australian titles			
Originated in Australia	341.4	502.2	843.6
Acquired from overseas under separate rights agreement	3.7	29.7	33.4
<i>Total Australian titles</i>	<i>345.1</i>	<i>531.9</i>	<i>877.0</i>
Imported titles	205.2	287.2	492.4
Total	550.5	818.9	1 369.4

	AUSTRALIAN(b)			IMPORTED		
	Number of books sold	Value	Average selling price per book	Number of books sold	Value	Average selling price per book
			million			\$m
.....						
Education						
Primary	16.4	120.4	7.33	np	np	np
Secondary	3.4	85.8	25.46	np	np	np
Tertiary	2.0	56.8	27.80	2.8	84.6	30.46
Professional and reference	3.1	65.5	21.39	1.6	40.6	26.09
<i>Total education</i>	24.9	328.4	13.19	11.5	205.3	17.81
General						
Hardback						
Nonfiction	4.8	64.2	13.26	2.9	41.8	14.22
Fiction	1.4	26.5	18.98	1.6	20.8	13.22
Children's	1.4	8.3	5.79	2.0	30.3	15.10
<i>Total hardback</i>	7.7	99.0	12.91	6.5	92.9	14.25
Trade paperback						
Nonfiction	14.3	207.1	14.44	3.3	42.0	12.61
Fiction	2.6	48.5	18.32	2.1	30.9	14.70
Children's	2.5	16.1	6.45	1.0	9.2	8.98
<i>Total trade paperback</i>	19.5	271.8	13.94	6.5	82.1	12.71
Mass-market paperback						
Nonfiction	4.9	40.3	8.20	3.3	47.0	14.13
Fiction	6.6	43.5	6.62	4.6	38.5	8.31
Children's	7.7	18.5	2.41	4.2	25.4	6.01
<i>Total mass-market paperback</i>	19.2	102.3	5.34	12.2	110.8	9.10
<i>Total general</i>	46.3	473.1	10.21	25.2	285.8	11.36
Total printed books	71.2	801.5	11.25	36.7	491.1	13.39

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.

<i>Category of title</i>	<i>0-19 persons</i>	<i>20 or more persons</i>	<i>Total</i>
	no.	no.	no.
.....			
Printed titles originated and published by the business			
Education			
Primary	*161	2 445	2 605
Secondary	*71	477	548
Tertiary	**637	233	**870
Professional and reference	*278	314	592
<i>Total education</i>	<i>*1 147</i>	<i>3 468</i>	<i>4 615</i>
General			
Hardback			
Nonfiction	67	196	263
Fiction	np	np	117
Children's	np	np	139
<i>Total hardback</i>	<i>144</i>	<i>376</i>	<i>519</i>
Trade paperback			
Nonfiction	302	752	1 054
Fiction	*116	211	327
Children's	**284	163	*447
<i>Total trade paperback</i>	<i>702</i>	<i>1 126</i>	<i>1 828</i>
Mass-market paperback			
Nonfiction	*138	160	299
Fiction	np	np	903
Children's	np	np	146
<i>Total mass-market paperback</i>	<i>*214</i>	<i>1 134</i>	<i>1 347</i>
<i>Total general</i>	<i>1 060</i>	<i>2 635</i>	<i>3 694</i>
<i>Total print titles</i>	<i>2 206</i>	<i>6 103</i>	<i>8 310</i>
Electronic titles originated and published by the business			
	np	np	173
Titles originated by other publishers and co-published by the business			
	np	np	70
Total titles	2 298	6 255	8 553

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

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

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

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

		BOOK PUBLISHERS(a)		OTHER MAJOR CONTRIBUTORS(b)		TOTAL	
		2001-02(c)	2002-03	2001-02(c)	2002-03	2001-02(c)	2002-03
Number of books sold	million	127.9	112.6	1.9	1.8	129.8	114.4
Income							
Sales of all books							
Sales of Australian titles	\$m	808.7	831.8	45.1	45.2	853.8	877.0
Sales of imported titles	\$m	491.9	480.9	11.1	11.5	503.0	492.4
<i>Total</i>	\$m	1 300.7	1 312.7	56.2	56.7	1 356.8	1 369.4
Sales of other goods	\$m	np	73.9	np	—	59.6	73.9
Other income	\$m	np	132.3	np	3.0	126.3	135.3
<i>Total</i>	\$m	1 482.6	1 518.9	60.1	59.7	1 542.7	1 578.6
Average income per business	\$m	6.5	6.4	6.0	6.0	6.5	6.4
Expenses							
Wages and salaries	\$m	233.4	232.1	16.3	16.5	249.6	248.6
Royalties and fees	\$m	91.7	100.1	1.7	2.2	93.5	102.3
Other expenses	\$m	1 076.7	1 097.1	40.7	39.8	1 117.3	1 136.8
<i>Total</i>	\$m	1 401.7	1 429.2	58.7	58.4	1 460.4	1 487.7
Average expenses per business	\$m	6.2	6.1	5.9	5.8	6.2	6.0
Inventories							
Change in inventories	\$m	-32.2	-2.5	0.2	—	-32.0	-2.5
Ratio of inventory to sales of all books	%	20.7	19.9	6.6	6.4	20.1	19.4
Employment							
Males	no.	1 724	1 653	137	130	1 861	1 783
Females	no.	3 288	3 362	214	194	3 502	3 556
<i>Persons</i>	no.	5 012	5 015	352	325	5 364	5 340
Average employment per business	no.	22	21	35	33	23	22
Other key aggregates							
Ratio of royalties and fees to sales of Australian titles	%	11.3	12.0	3.9	4.9	10.9	11.7
Export sales of books(d)	\$m	186.7	206.3	2.5	3.2	189.2	209.5
Internet sales of books	\$m	np	**13.0	np	1.1	6.8	**14.1
Operating profit before tax	\$m	48.7	87.2	1.6	1.2	50.2	88.4
Profit margin	%	3.3	5.7	2.6	2.0	3.3	5.6
Industry value added	\$m	376.4	419.3	25.2	25.1	401.6	444.3
Average wages and salaries per employee	\$'000	48.6	48.0	46.3	50.7	48.5	48.2
Number of businesses	no.	227	236	10	10	237	246

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

— 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 2001-02 have been revised (see paragraph 23 in the Explanatory Notes).

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

		1994(a)	1995-96	1997-98	1999-2000	2000-01(b)	2001-02(b)	2002-03
Number of books sold	million	124.8	130.6	111.5	129.4	104.3	129.8	114.4
Sales of all books	\$m	841.7	950.0	1 035.6	1 270.4	1 260.6	1 356.8	1 369.4
Sales of Australian titles	\$m	487.7	561.1	623.5	756.1	747.7	853.8	877.0
Sales of imported titles	\$m	354.0	388.9	412.1	514.3	512.9	503.0	492.4
Export sales of books(c)	\$m	81.1	80.3	109.8	151.1	162.5	189.2	209.5

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

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

(b) Data for 2000-01 and 2001-02 have been revised (see paragraph 23 in the Explanatory Notes).

EXPLANATORY NOTES

SCOPE AND COVERAGE

1 The scope of the 2002–03 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 2002* (Bookman Press 2002) 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 obtained from either the Australian Publishers Association membership list or *The Australian Writer's Marketplace 2002*.

4 In total there were 246 businesses found to be within the scope of the collection (as defined above). Data were obtained from all of the 10 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 236 businesses predominantly involved in book publishing. That is, a sample of 141 businesses were selected; their responses have been weighted to represent the 236 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 UNITS DEFINED ON THE ABS BUSINESS REGISTER

6 The ABS uses an economic statistics units model on the ABS Business Register to describe the characteristics of businesses, and the structural relationships between related businesses. The units model is also used to break groups of related businesses into relatively homogeneous components that can provide data to the ABS.

7 In mid-2002, to better use the information available as a result of The New Tax System, the ABS changed its economic statistics units model. The new units model allocates businesses to one of two sub-populations. The vast majority of businesses are in what is called the Australian Taxation Office (ATO) Maintained Population, while the remaining businesses are in the ABS Maintained Population. Together, these two sub-populations make up the ABS Business Register population.

ATO Maintained Population

8 Most businesses and organisations in Australia need to obtain an Australian Business Number (ABN), and are then included on the ATO Australian Business Register. Most of these businesses have simple structures; therefore the unit registered for an ABN will satisfy ABS statistical requirements. For these businesses, the ABS is aligning its statistical units structure with the ABN unit. The businesses with simple structures constitute the ATO Maintained Population, and the ABN unit will be used as the economic statistics unit for all economic collections.

EXPLANATORY NOTES *continued*

ABS Maintained Population

9 For the population of businesses where the ABN unit is not suitable for ABS statistical requirements, the ABS will maintain its own units structure through direct contact with the business. These businesses constitute the ABS Maintained Population. This population consists typically of large, complex and diverse businesses. The new statistical units model described below has been introduced to cover such businesses.

Enterprise Group: This is a unit covering all the operations in Australia of one or more legal entities under common ownership and/or control. It covers all the operations in Australia of legal entities which are related in terms of the current Corporations Law (as amended by the *Corporations Legislation Amendment Act 1991*), including legal entities such as companies, trusts, and partnerships. Majority ownership is not required for control to be exercised.

Enterprise: The enterprise is an institutional unit comprising (i) a single legal entity or business entity, or (ii) more than one legal entity or business entity within the same Enterprise Group and in the same institutional sub-sector (i.e. they are all classified to a single Standard Institutional Sector Classification of Australia sub-sector).

Type of Activity Unit (TAU): The TAU is comprised of one or more business entities, sub-entities or branches of a business entity within an Enterprise Group that can report production and employment data for similar economic activities. When a minimum set of data items are available, a TAU will be created which covers all the operations within an industry subdivision (and the TAU will be classified to the relevant subdivision of the Australian and New Zealand Standard Industrial Classification). Where a business cannot supply adequate data for each industry, a TAU will be formed which contains activity in more than one industry subdivision.

10 Data in this publication have been adjusted to allow for lags in processing new businesses to the ABS Business Register, and the omission of some businesses from the register.

11 For more information on the impacts of the introduction of the new economic statistics units model, refer to *Information Paper: Improvements in ABS Economic Statistics [Arising from the New Tax System]* (cat. no. 1372.0).

12 Prior to 2001–02, the Book Publishers Survey used the management unit as the statistical unit. For issues of this publication relating to 2001–02 onwards, the statistical unit in the Book Publishers Survey is the ABN unit for businesses with simple structures, and the TAU for businesses with complex structures. In most cases, ABN/TAU units will concord with the management units used prior to 2001–02.

INTERPRETATION OF DATA

13 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.

RELIABILITY OF DATA

14 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.

EXPLANATORY NOTES *continued*

RELIABILITY OF DATA *continued*

15 There are about two chances in three 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.

16 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.

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

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

	2001-02	2002-03
	%	%
Total		
Number of books sold	6.5	5.9
Income		
Sales of all books		
Sales of Australian titles	5.8	5.4
Sales of imported titles	8.5	6.5
<i>Total</i>	5.9	4.9
Sales of other goods	18.5	16.4
Other income	12.7	8.0
<i>Total</i>	5.9	4.8
Average income per business	12.4	11.2
Expenses		
Wages and salaries	6.0	4.7
Royalties and fees	6.9	6.8
Other expenses	6.1	5.1
<i>Total</i>	6.0	5.0
Average expenses per business	12.4	11.1
Inventories		
Change in inventories	17.5	263.2
Ratio of inventory to sales of all books	6.8	4.0
Employment		
Males	6.5	4.9
Females	6.3	4.9
Persons	6.1	4.8
Average employment per business	11.9	11.1
Other key aggregates		
Ratio of royalties and fees to sales of Australian titles	4.3	4.8
Export sales of books	13.2	10.6
Internet sales of books	18.7	64.3
Operating profit before tax	20.6	13.9
Profit margin	21.7	14.1
Industry value added	5.9	4.9
Average wages and salaries per employee	2.0	1.4
Number of businesses	11.1	10.7

EXPLANATORY NOTES *continued*

RELIABILITY OF DATA *continued*

18 As an example, the estimate of total income for book publishers and other major contributors for 2002–03 is \$1,578.6m and the RSE is 4.8%, giving a SE of \$75.8m. Therefore, there are two chances in three that, if all businesses in the population had been included in the survey, a figure in the range of A\$1,502.8m to \$1,654.4m 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 \$1,427.0m to \$1,730.2m.

19 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.

20 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.

SUPPRESSION OF DATA

21 Some data have been suppressed to prevent disclosure, either directly or by inference, of information relating to individual businesses. These data have been replaced by the symbol 'n.p.', but are included in totals.

COMPARISON WITH PREVIOUS DATA

22 The Book Publishers Survey was previously conducted in respect of 1994, 1995–96, 1997–98, 1999–2000, 2000–01 and 2001–02. As for the 2002–03 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. 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 comparisons over time can be made using the results from the latest survey (2002–03) and earlier surveys (see table 17).

REVISIONS TO 2000–01 AND 2001–02 DATA

23 The data for 2000–01 and 2001–02 have been revised to include corrections to figures previously reported by businesses to the ABS. These revisions are reflected in the data presented in tables 16 and 17.

RELATED PUBLICATIONS

24 ABS publications which may be of interest include:
Book Publishers, Australia, 2001–2002, cat. no. 1363.0
Book Retailers, Australia, 2001–02, cat. no. 1371.0
Manufacturing Industry, Australia, 2000–2001, cat. no. 8221.0

25 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.

EXPLANATORY NOTES *continued*

RELATED PUBLICATIONS *continued*

26 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 paragraph 22 above regarding comparability of data.

ABS DATA AVAILABLE ON REQUEST

27 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

28 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 originated title	A book that has an Australian International Standard Book Number (ISBN) 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. An Australian originated title could be written by either Australian or overseas authors but its rights must be secured by an Australian publisher.
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 2003.
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.
Imported title	A book which has a non-Australian ISBN whose rights are held by an overseas book publisher. The book may have been written by an Australian author.
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).

GLOSSARY *continued*

New title	A title being published in the period covered by the survey and featured in a publisher's current catalogue.
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, which includes 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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