



Prepared by	Book Publishers Association of New Zealand
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Survey of Book Publishing in New Zealand
Version 1 -2005

COMMERCIAL IN CONFIDENCE

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COMMENTARY

First of all, on behalf of the Book Publishers Association of New Zealand (BPANZ), I'd like to thank everyone who contributed to this, our first annual survey of Book Publishing in this country.

The response exceeded our expectations. The breadth and depth of those who participated means we have a high level of confidence the results provide a clear and representative picture of our industry.

As you will see there are some fascinating results; the differences between the different types of Publishers, the strength of export earnings and evidence of the growth of our industry.

The results as a whole provide a resource of great value. To you and I as Book Publishers, the results provide an excellent reference of what's happening in the industry, a key reference to relate our own businesses to.

For BPANZ, the results will allow us to illustrate the economic importance of our industry, citing the industry's turnover, export earnings and employment numbers.

While it is important to recognise what we have, it is only the first step. Next year and in future years we will repeat the study, providing Publishers and BPANZ with an ongoing measure of the industry and of the changes occurring, year on year.

Thanks again for your involvement. Thanks also to Colmar Brunton and to Tony Fisk for their development and coordination of the survey.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Michael Moynahan', with a long horizontal flourish extending to the right.

Michael Moynahan

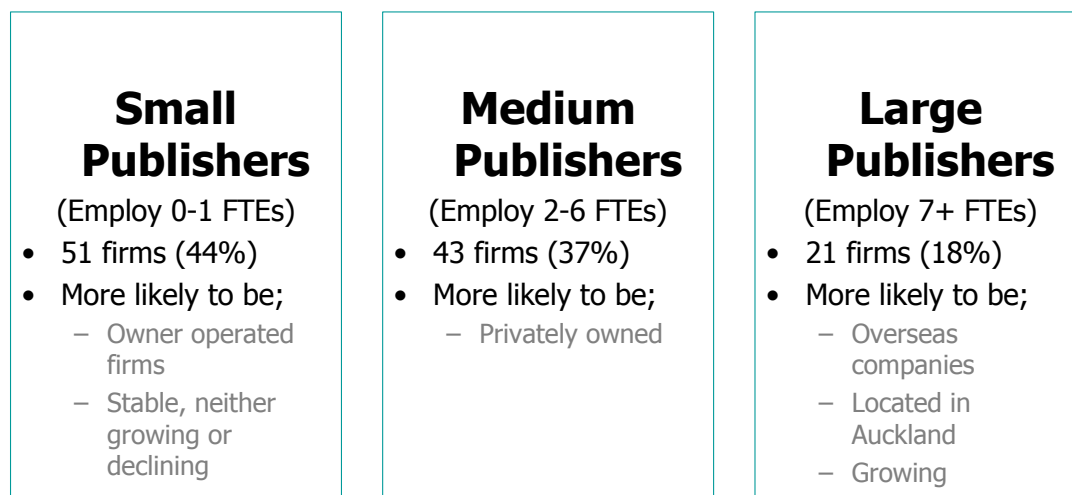
President – Book Publishers Association of New Zealand

EXECUTIVE SUMMARY

- 115 Book Publishers completed the survey
 - 122 firms replied saying they didn't want to or didn't feel it was appropriate to complete the survey. Most were hobby publishers – publish less than 1 book per year
- In 2005, the New Zealand Book Publishing industry turned over \$264,022,962
- In 2005, the New Zealand Book Publishing industry published 2,240 new New Zealand titles
- Education is the single biggest publishing category
 - Making up over 40% of new and revised titles
- The turnover from New Zealand published titles was \$148,407,460 – 56% of the total industry turnover.
- In 2005, the New Zealand Book Publishing industry employed 994 people
- Small Publishers makes up a large part of the industry
 - 44% of publishers employ 1 or less full time equivalent staff member
 - Only 18% employ more than 7 people
- The industry is growing
 - 44% of publishers say their business is growing
 - While only 8% say its declining

THREE TYPES OF PUBLISHER

Throughout the survey, there were clear differences driven by the size of the business. Three groups were identified; Small Publishers, Medium Publishers and Large Publishers.



Throughout this report we provide cross analysis of the results to illustrate the differences amongst these three groups.

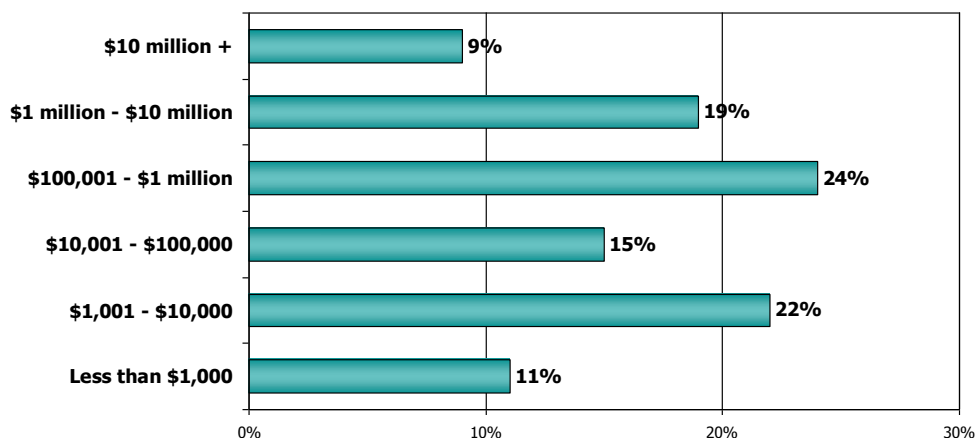
DETAILED RESULTS

REVENUE

What was your company's total turnover including imported and locally published titles, rights and third party distribution for the 2005 financial year? Please ensure you exclude sales made on behalf of other New Zealand publishers.

Revenue

What was your company's total turnover including imported and locally published titles, rights and third party distribution for the 2005 financial year? Please ensure you exclude sales made on behalf of other New Zealand publishers.



Base: N=115, All Book Publishers

The chart above illustrates the distribution of Book Publishers' total turnover in 2005. In total, Book Publishers earned \$264,022,962 during 2005.

- The mean (average) turnover figure for Book Publishers was \$2,295,852
- The median (middle) turnover figure Book Publishers was \$171,107.

There are differences by the three types of Publishers;

- Small Publishers generated \$3,406,852 (1%) in turnover in 2005
- Medium Publishes generated \$37,358,761 (14%) in turnover in 2005
- Large Publishers generated \$223,257,358 (85%) in turnover in 2005

DETAILED RESULTS

REVENUE – NEW ZEALAND VS. IMPORTED TITLES

How was your turnover split between New Zealand published titles and imported titles?

New Zealand vs. Imported Titles

How was your turnover split between New Zealand published titles and imported titles?



Base: N=115, All Book Publishers

The chart above illustrates how all Book Publisher's turnover was split between New Zealand published titles and imported titles in 2005.

Amongst all Book Publishers, \$148,407,460 in turnover was derived from sales of New Zealand published titles. This equated to 56% of total industry turnover.

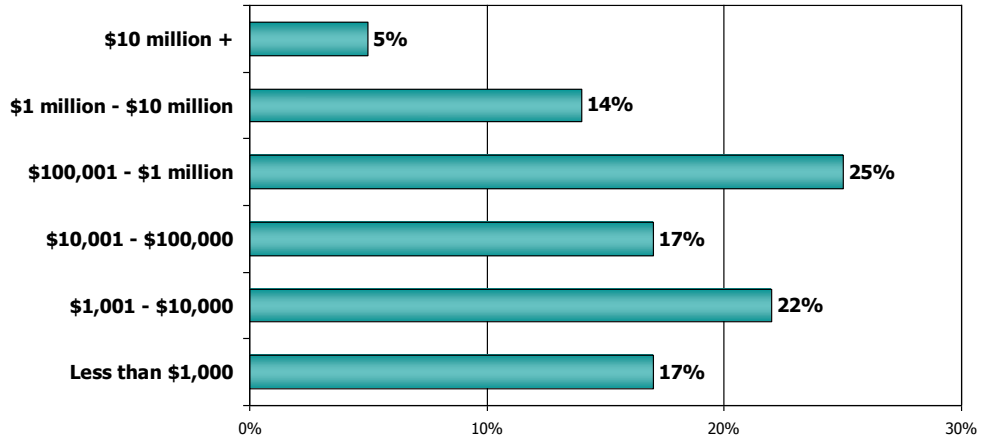
Amongst all Book Publishers, \$115,615,502 in turnover was derived from sales of imported published titles. This equated to 44% of total industry turnover.

Amongst the three types of Book Publishers;

- Small Publishers turnover was split 71%/29% in favour of New Zealand published titles
- Medium Publishers turnover was split 50%/50%
- Large Publishers turnover was split 57%/43% in favour of New Zealand published titles

New Zealand Titles Revenue

How was your turnover split between New Zealand published titles and imported titles?



Base: N=115, All Book Publishers

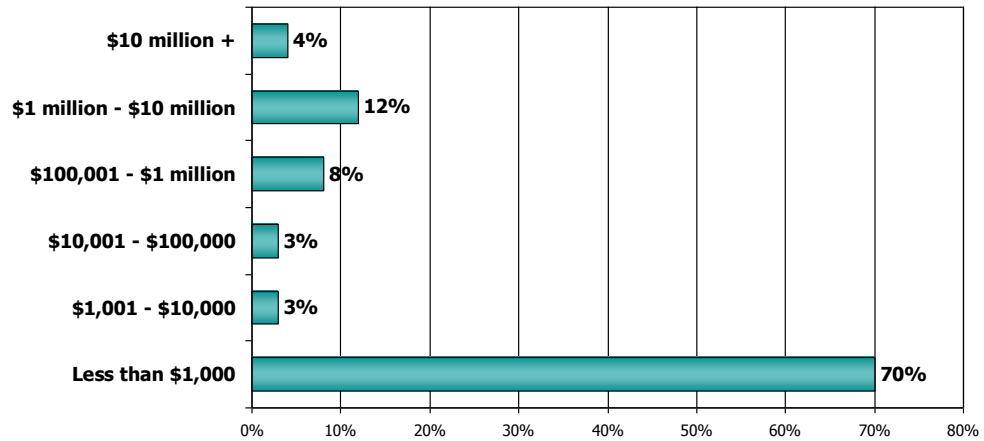
The chart above illustrates the distribution of Book Publisher's turnover from New Zealand published titles in 2005.

Turnover from New Zealand published titles totalled \$148,407,460 in 2005.

- The mean turnover figure from New Zealand published titles per Book Publisher was \$1,290,500.
- The median turnover figure from New Zealand published titles per Book Publisher was \$30,000.

Imported Titles Revenue

How was your turnover split between New Zealand published titles and imported titles?



Base: N=115, All Book Publishers

The chart above illustrates the distribution of Book Publisher's turnover from imported titles in 2005.

Turnover from imported titles totalled \$115,615,502 in 2005.

- The mean turnover figure from imported titles per Book Publisher was \$1,005,352.
- The median turnover figure from imported titles per Book Publisher was \$0.

70% of Book Publishers turned over less than \$1,000 from imported titles in 2005.

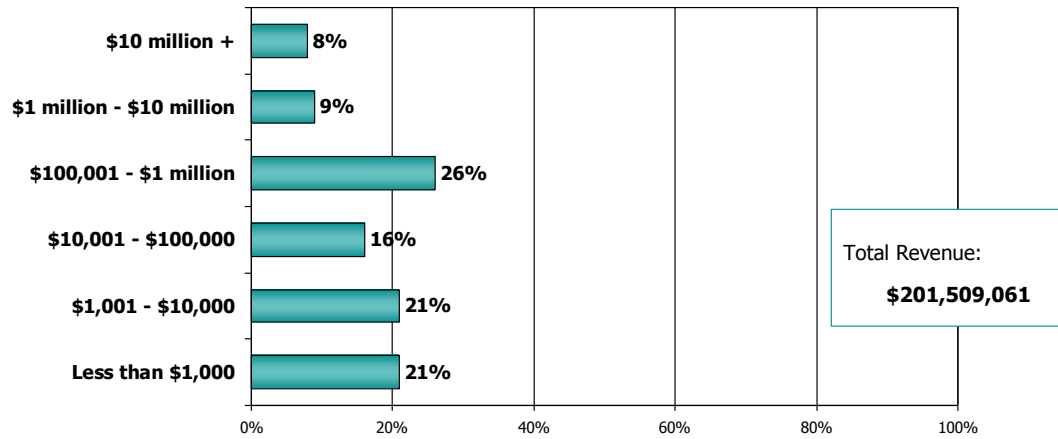
DETAILED RESULTS

REVENUE – BY REGION

How was your turnover, including rights and third party distribution, income split by region?

Revenue by Region – New Zealand

How was your turnover, including rights and third party distribution, income split by region?



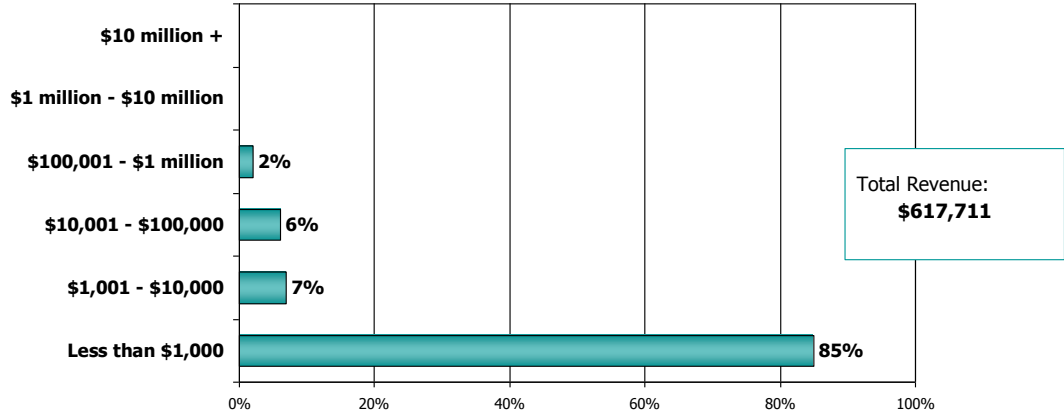
Base: N=115, All Book Publishers

The chart above illustrates the distribution of Book Publisher's turnover from sales within New Zealand.

- In 2005, \$201,509,061 in turnover was generated in sales within New Zealand
- This represents 76% of total industry turnover

Revenue by Region – Asia

How was your turnover, including rights and third party distribution, income split by region?



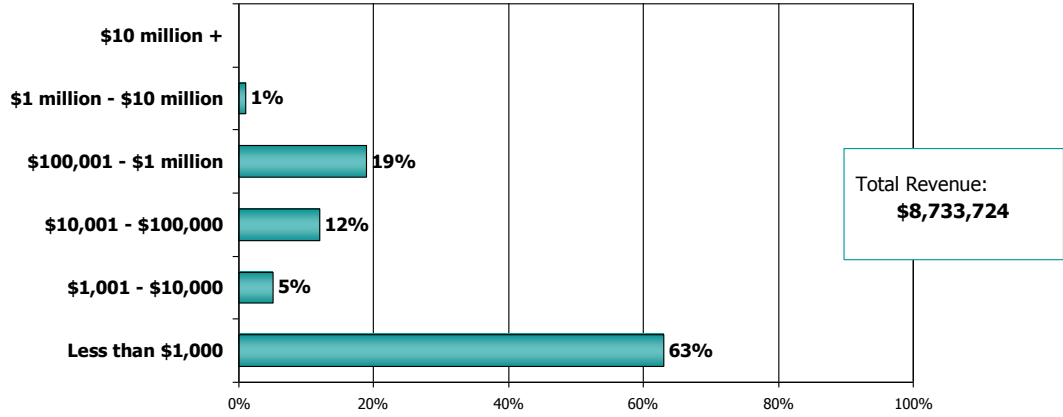
Base: N=115, All Book Publishers

The chart above illustrates the distribution of Book Publisher's turnover from sales to Asia.

- In 2005, \$617,711 in turnover was generated in sales to Asia
- This represents 0.2% of total industry turnover
- This represents 1% of export earnings

Revenue by Region – Australia

How was your turnover, including rights and third party distribution, income split by region?



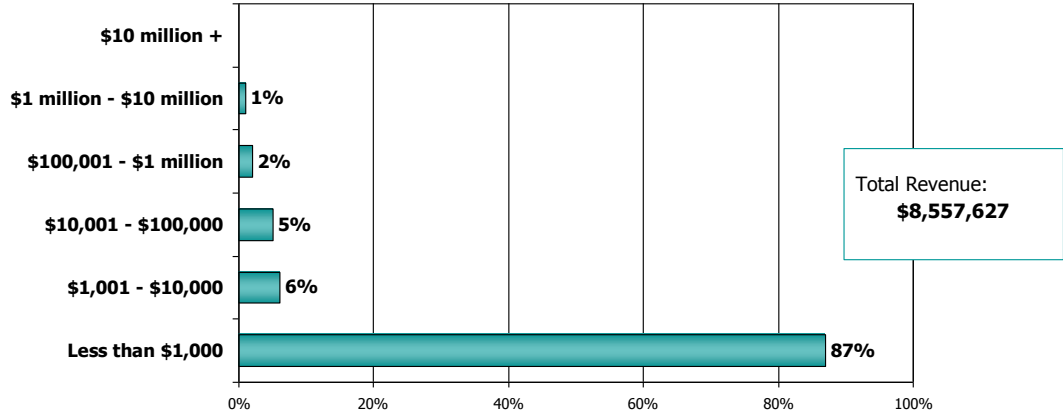
Base: N=115, All Book Publishers

The chart above illustrates the distribution of Book Publisher's turnover from sales to Australia.

- In 2005, \$8,733,724 in turnover was generated in sales to Australia
- This represents 3% of total industry turnover
- This represents 14% of export earnings

Revenue by Region – Europe (excl. UK)

How was your turnover, including rights and third party distribution, income split by region?



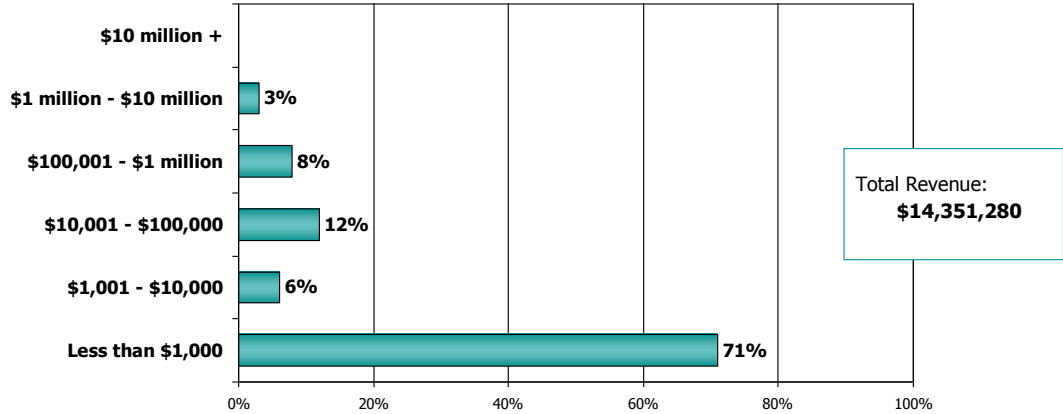
Base: N=115, All Book Publishers

The chart above illustrates the distribution of Book Publisher's turnover from sales to Europe (excluding the UK).

- In 2005, \$8,557,627 in turnover was generated in sales to Europe (excluding the UK)
- This represents 3% of total industry turnover
- This represents 14% of export earnings

Revenue by Region – North America (including Canada)

How was your turnover, including rights and third party distribution, income split by region?



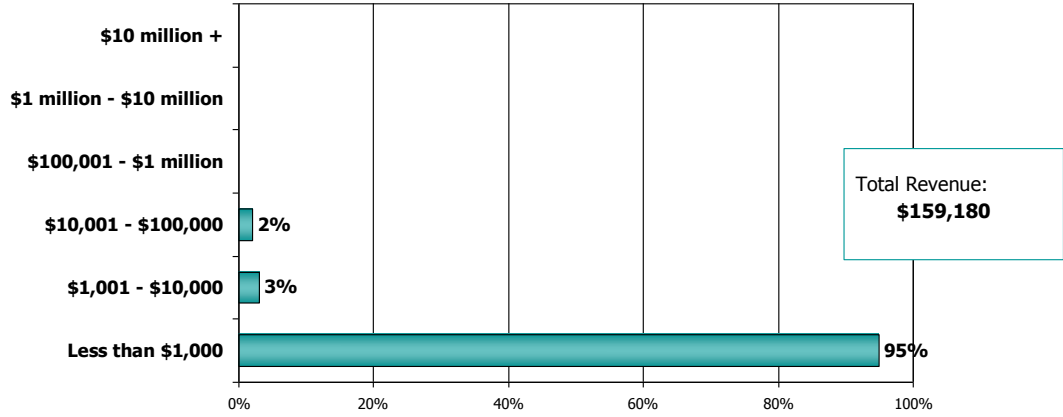
Base: N=115, All Book Publishers

The chart above illustrates the distribution of Book Publisher's turnover from sales to North America (including Canada).

- In 2005, \$14,351,280 in turnover was generated in sales to North America (including Canada)
- This represents 5% of total industry turnover
- This represents 23% of export earnings

Revenue by Region – South Africa

How was your turnover, including rights and third party distribution, income split by region?



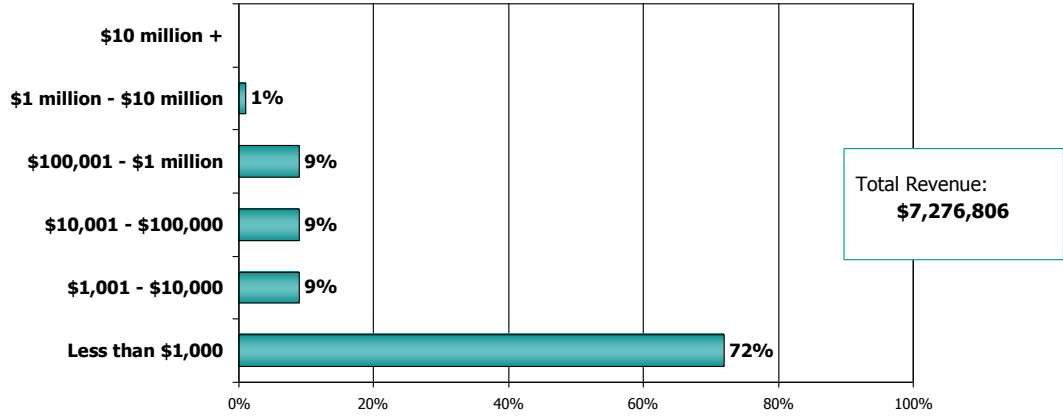
Base: N=115, All Book Publishers

The chart above illustrates the distribution of Book Publisher's turnover from sales to South Africa.

- In 2005, \$159,180 in turnover was generated in sales to South Africa
- This represents 0.1% of total industry turnover
- This represents 0.3% of export earnings

Revenue by Region – United Kingdom

How was your turnover, including rights and third party distribution, income split by region?

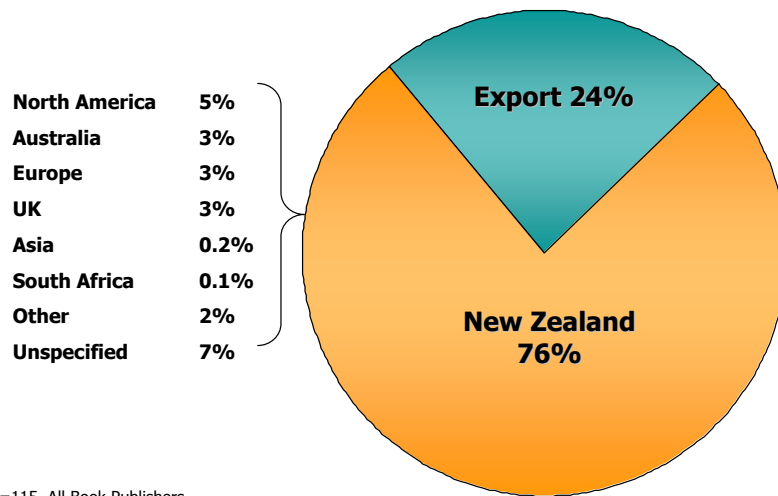


Base: N=115, All Book Publishers

The chart above illustrates the distribution of Book Publisher's turnover from sales to the United Kingdom.

- In 2005, \$7,276,806 in turnover was generated in sales to the United Kingdom
- This represents 3% of total industry turnover
- This represents 13% of export earnings

Total Revenue – By Region



Base: N=115, All Book Publishers

The chart above illustrates the split between domestic and export earnings for Book Publishers in 2005.

- Turnover derived from domestic sales total \$201,509,061
- Domestic earnings equate to 76% of total industry turnover

- Turnover derived from export sales total \$62,513,901
- Export earnings equate to 24% of total industry turnover*

* Note: \$18,692,987 of export earnings were not allocated to a specific region by Book Publishers

DETAILED RESULTS

TITLES

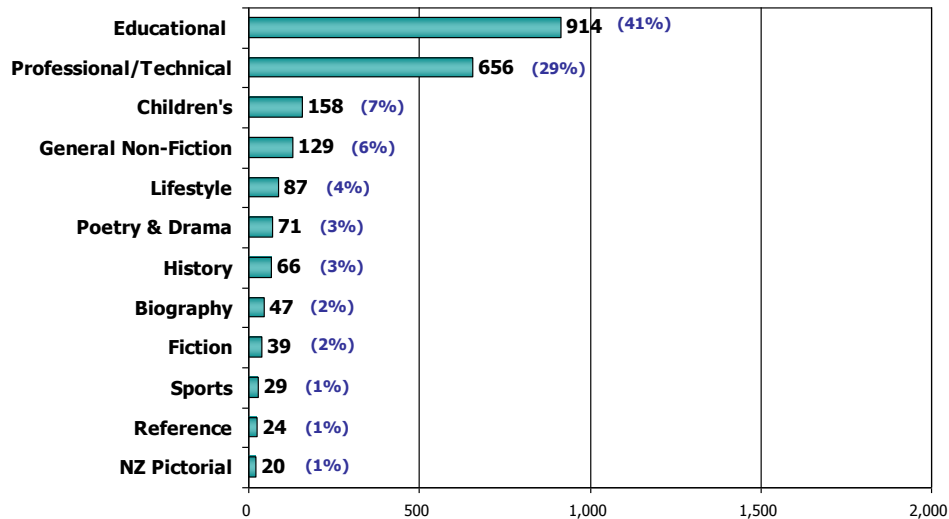
Please enter into the boxes below the number of new New Zealand titles your company published in the 2005 financial year for each category.

Please enter into the boxes below the number of revised New Zealand titles your company published in the 2005 financial year for each category.

Titles

New New Zealand Titles in 2005

Please enter into the boxes below the number of new New Zealand titles your company published in the 2005 financial year for each category.



Base: N=115, All Book Publishers

The chart above illustrates the distribution of new New Zealand titles published by Book Publishers in 2005.

In total, 2,240 new New Zealand titles were published in 2005.

Education was the single biggest category with 914 new titles published

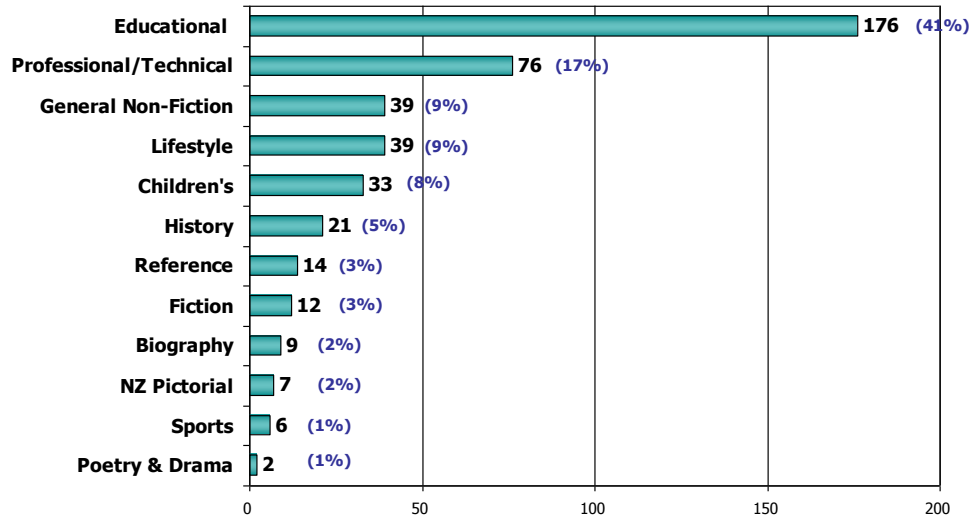
- This equates to 41% of all new titles published in 2005

Professional/Technical was the second most significant category with 656 new titles published

- This equates to 29% of all new titles published in 2005

Revised New Zealand Titles in 2005

Please enter into the boxes below the number of revised New Zealand titles your company published in the 2005 financial year for each category.



Base: N=115, All Book Publishers

The chart above illustrates the distribution of revised titles published by Book Publishers in 2005.

In total, 436 revised titles were published in 2005.

Like the new New Zealand titles, Education and Professional/Technical are the two biggest contributors to revised titles

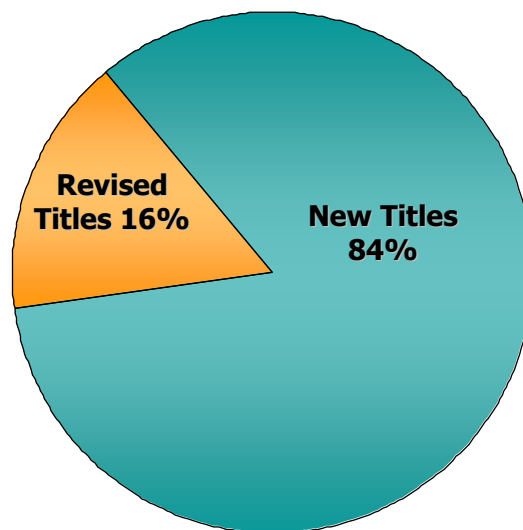
Education was the single biggest category with 176 revised titles published

- This equates to 41% of all new titles published in 2005

Professional/Technical was the second most significant category with 76 revised titles published

- This equates to 17% of all new titles published in 2005

Titles – New and Revised



Base: N=115, All Book Publishers

The chart above illustrates the split between new New Zealand titles and revised titles published in 2005.

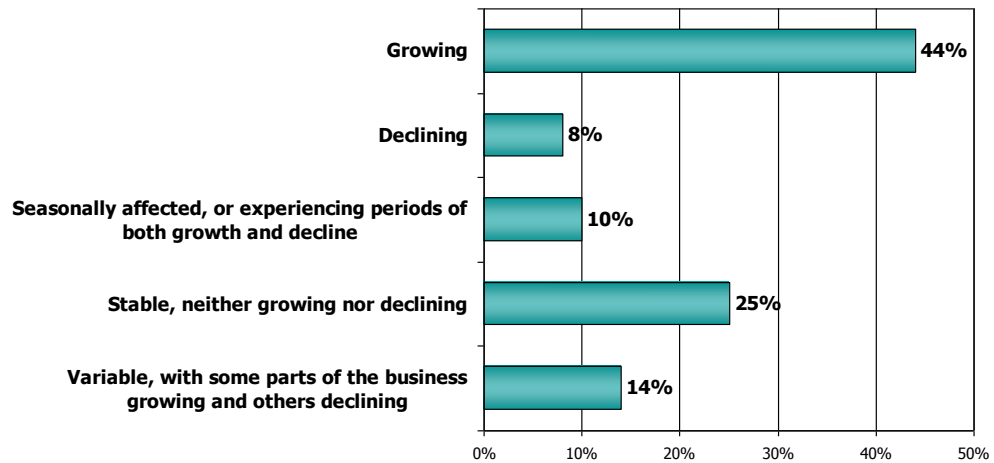
- In total, 2,240 new New Zealand titles were published in 2005
- This equates to 84% of total titles

- In total, 436 revised titles were published in 2005
- This equates to 16% of total titles

Business Details

Business Performance

Which one of the following statements best describes your overall business performance over the last year?



Base: N=115, All Book Publishers

The chart above illustrates the distribution of Book Publishers perceptions of the state of their business.

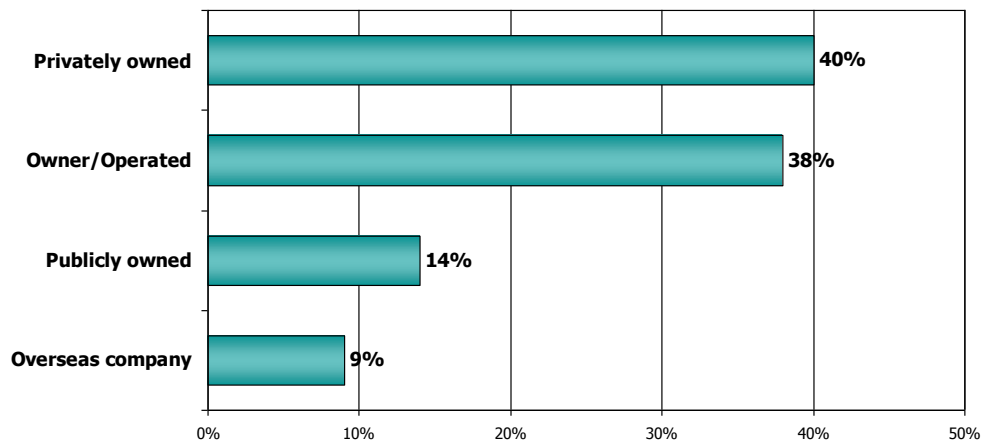
- 44% consider their business to be growing
- 8% consider their business to be declining
- 10% consider their business to be seasonally affected
- 25% consider their business to be stable
- 14% consider their business to be variable

Comparing those who consider their business to be growing (44%) and those who consider their business to be declining (8%) it can be seen that there is industry growth (net 36%).

APPENDIX A – BUSINESS DETAILS

Business Ownership

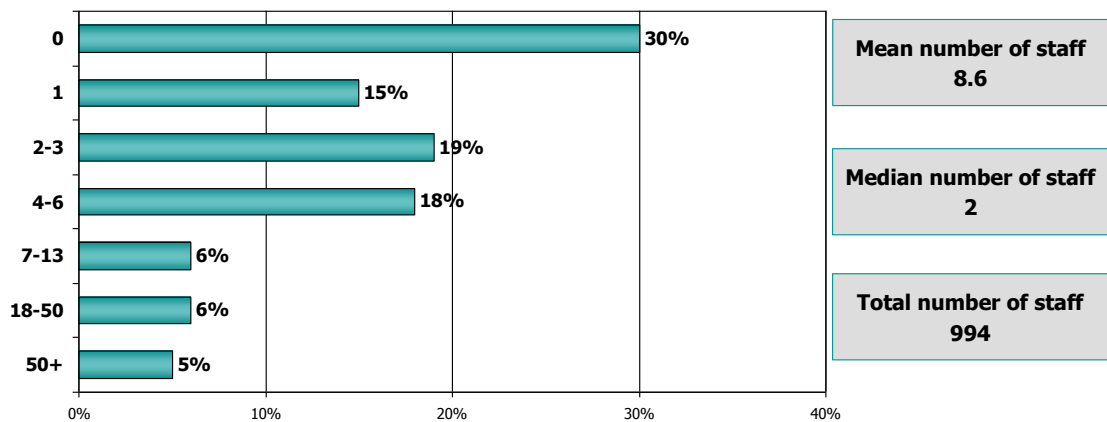
Which of the following best describes how your business is owned ?



Base: N=115, All Book Publishers

Number of Employees

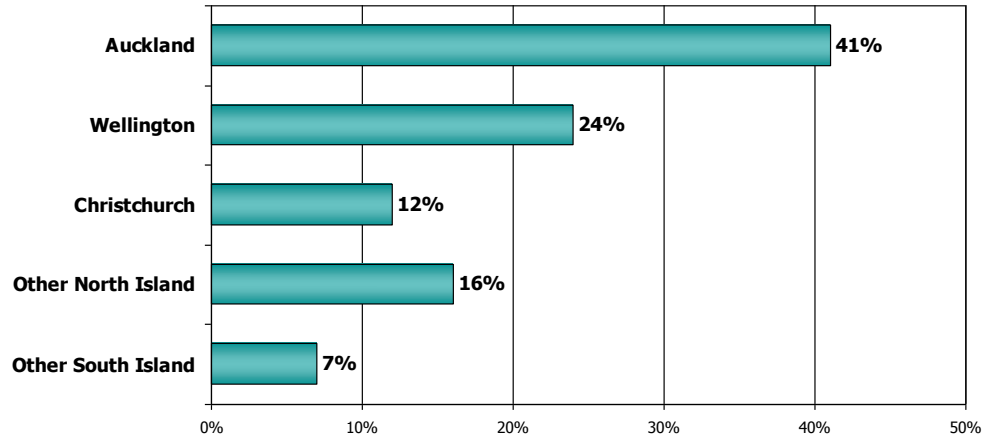
How many full time equivalent staff do you employ?



Base: N=115, All Book Publishers

Location

Where is your business located?



Base: N=115, All Book Publishers

APPENDIX B – QUESTIONNAIRE

2005 SURVEY OF BOOK PUBLISHING IN NEW ZEALAND



Introduction

You will have recently received a letter from the Book Publishers Association of New Zealand (BPANZ) explaining the importance of understanding our industry. For you, our members, being familiar with the size and scope of our industry will provide you with an important point of reference. Measuring the industry also allows us, the BPANZ, to illustrate its importance to the economy in such terms as employment and foreign exchange earnings.

Colmar Brunton is conducting this survey for the BPANZ. Once the data has been analysed, top line results will be available at www.bpanz.org.nz

Confidentiality Guaranteed

Colmar Brunton is a market research company specialising in this type of survey. All results are reported in aggregated form so that no individual company can be identified. The BPANZ will receive summarised statistical information only. No one other than Colmar Brunton will have access to individual responses.

Contact

If you have any questions about the survey please do not hesitate to contact;

Connon Bray
Account Director
Colmar Brunton
(09) 919 9253
connon.bray@cbrak.co.nz

OR

Tony Fisk
BPANZ
(09) 443 9406
tony.fisk@harpercollins.co.nz

Instructions

This survey will measure the book publishing industry on an annual basis. Please input your results from the financial year just completed. The survey is interested in the 2005 tax year – 1 April 2004 – 31 March 2005. If your financial and publishing records are for a different period, please answer questions 1 and 2 appropriately.

Please ensure you exclude sales made on behalf of other New Zealand publishers

Please note:

All dollar amounts should be entered as numbers without symbols or cents.

Time Period

1. This survey is focused on the 2005 tax year – 1 April 2004 – 31 March 2005. Is the information you intend to provide for this period?

Yes	GO TO Q3
No	CONTINUE

2. What period is the information you have for?

START DATE

END DATE

CHECK =12 MONTHS

Revenue

Reminder: All individual results are confidential and held only by Colmar Brunton. The BPANZ only receives aggregated results.

3. What was your company's total turnover including imported and locally published titles, rights and third party distribution for the 2005 financial year?

Please ensure you exclude sales made on behalf of other New Zealand publishers

\$

4. How was your turnover split between New Zealand Published Titles and Imported Titles?

Please ensure you exclude sales made on behalf of other New Zealand publishers

New Zealand Published Titles	\$
Imported Titles	\$
Total	\$ Total to Question 3

5. How was your turnover, including rights and third party distribution, including rights, and third party distribution income split by region?

Please ensure you exclude sales made on behalf of other New Zealand publishers

New Zealand	\$
Asia	\$
Australia	\$
Europe (excluding UK)	\$
North America (Including Canada)	\$
South Africa	\$
United Kingdom	\$
Other	\$
	\$ Total to Question 3

New Zealand Published Titles

6. **New Titles**

Please enter into the boxes below the number of new New Zealand titles your company published in the 2005 financial year for each category.

Biography	
Children's	
Educational (Including Text Books)	
Fiction	
General Non-Fiction	
History	
Lifestyle (Cookery/Gardening etc)	
NZ Pictorial	
Poetry and Drama	
Professional / Technical	
Reference	
Sports	

7. **Revised Titles**

Please enter into the boxes below the number of revised New Zealand titles your company published in the 2005 financial year for each category.

Biography	
Children's	
Educational (Including Text Books)	
Fiction	
General Non-Fiction	
History	
Lifestyle (Cookery/Gardening etc)	
NZ Pictorial	
Poetry and Drama	
Professional / Technical	
Reference	
Sports	

Your Business

8. Which of the following best describes how your business is owned?

Listed company	
Overseas company	
Owner operated	
Privately owned	
Publicly owned/institutional	

9. How many full time equivalent staff do you employ?

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10. How are those staff allocated across the following functions?

Administration/Finance/IT	
Publishing/Editorial/Production/Design	
Sales/Marketing	
Distribution	
	Q10

11. Which **one** of the following statements best describes your overall business performance over the last year?

Growing	
Declining	
Seasonally affected, or experiencing periods of both growth and decline	
Stable, neither growing nor declining	
Variable, with some parts of the business growing and others declining	

12. Where is your business located?

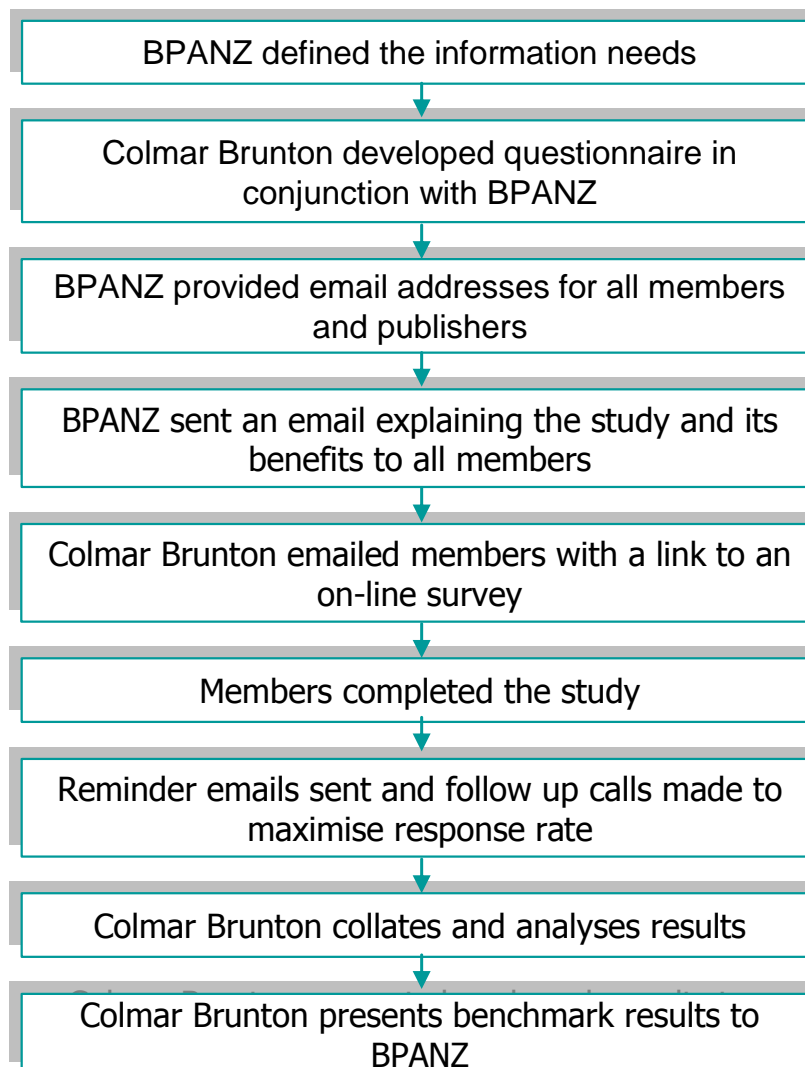
Auckland	
Wellington	
Christchurch	
Dunedin	
Hamilton	
Hawkes Bay	
Tauranga	
Palmerston North	
Nelson	
Invercargill	
Whangarei	
New Plymouth	
Gisbourne	
Rotorua	
Wanganui	
Other	

13. **Any other comments?**

If there are any particular comments you'd like to make about this survey or the BPANZ or the industry, please make them here.

Thank you for taking part in this survey. [Click here to close.](#)

APPENDIX C – METHODOLOGY



APPENDIX D – RESPONSE RATE

- Organisations asked to participate: 628
- Refusals: 122

- Potential participants: 506
- Actual participants: 155
- 31% response rate