



BOOK
PUBLISHERS
ASSOCIATION OF
NEW ZEALAND

The Publisher

THE PRESIDENT'S FILE

The beginning of a new year is nearly always a time for reflection. I don't mean silly resolutions that can be abandoned happily by 2 January with any number of self-justifications. Embarking on a New Year is like having a blank piece of paper to work with. Nothing at that point may have gone right, but nothing has gone wrong either. No author has delivered late, no critic has been unreasonable, no bookseller has missed the opportunity of a lifetime and no overdraft has crept up.

In our world, of course, the reality is that the year doesn't start with a blank page at all. We have any number of projects that were poised in December 2006 and still need to be dealt with in January 2007. But putting that to one side for a minute, let's imagine that we do have a blank page. What could 2007 bring?

As an industry organisation we have the following priorities:

- We will establish an administrative position to support the organisation, council and membership to further advance the goals and aspirations of BPANZ. We are advertising now for an Executive Director, and hope the new person will be on board by the end of the first quarter. This position is crucial to how we enhance the services offered to you and to the way the organisation responds to the changing world. The position will also need to find a way of becoming self-funding; the council has been prepared to invest in its establishment for one year.
- We will maintain and expand our support and co-ordination of international sales and marketing of New Zealand publishing. Priorities will be to get London underway, discuss with membership support for Beijing, and plan for Frankfurt, and we hope to resolve some issues around how the stand is being used. We also have to find other opportunities to exploit the potential of these fairs to bring New Zealand books to the world.

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- As publishing globally grapples with the ramifications of the digital age, we will work on understanding and interpreting the issues and providing membership with sound and useful advice.
 - This year will bring opportunities for training in specific areas alongside our more general training initiatives such as the intern programme.
 - We will distil the figures and trends provided by two years of the Colmar Brunton industry survey (which are, by the way, on the website) and pick out issues we can champion in the media and with government.
 - We will further support New Zealand Book Month and establish this as a powerful platform for New Zealand books that can grow more successful in coming years.

The fundamental tasks of our organisation are to explore ways that we can help you to help your businesses and to expand and enhance the position of New Zealand publishing. This will be made considerably easier when the council gets the support of an Executive Director.

Last year saw much change for the industry. Senior leaders who had been in publishing a long time left or signalled they would leave, distribution networks changed shape, and some booksellers consolidated while others expanded. I can't predict where the changes will come in 2007, but I bet that there will be some. In the meantime I know that we will continue to face issues like fluctuating exchange rates, paper prices and freight charges, as well as threats to copyright and the usual demands of publishing in a modern world.

While we briefly have the blank page, though, let's celebrate that:

- We are still here to face the challenges.
- We can still make a significant cultural as well as commercial contribution to this country.
- We participate in an industry that, at its core, is about ideas and passion.

By the time you read this, the year will have been well and truly disrupted by the reality of the day to day. Oh well, it had to happen. I urge you though to take some time to think about what you want to get done and make 2007 the year when it happens. Good luck.

Michael Moynahan, BPANZ President, michael@randomhouse.co.nz

BPANZ EXECUTIVE DIRECTOR

The Book Publishers Association of New Zealand (BPANZ) is seeking an Executive Director to assist in furthering the aims of the association.

BPANZ represents most book publishers in New Zealand both large and small and seeks to provide training, international marketing support and information as well as communication and networking opportunities for its members. This is a new position but there are established frameworks to operate within. We are seeking someone who can work with the governing council and support it to expand the role of the association and bring value to the members. This is a largely sole charge position so candidates need to have experience in running small

operations in their entirety from finance (MYOB is essential) to reporting. They need to be passionate about books and their cultural value as well as interested in the issues facing small to medium businesses. There may be some international travel involved and flexible working hours are possible. The position is based in Auckland and a North Shore location is likely.

Make your application by 16 March to BPANZ Director, Private Bag 102 950, NSMC, Auckland or email Natalie@randomhouse.co.nz

SURVEY SHOWS NEW ZEALAND PUBLISHING IN GOOD HEART

In 2005, with the assistance of funding support from Copyright Licensing Ltd (CLL), BPANZ launched a major initiative to scope the size of our industry – the annual Survey of Book Publishing in New Zealand. The survey, which is conducted by Colmar Brunton, measures industry turnover, overseas earnings, title output and employment statistics. As well as providing members with a valuable point of reference, the results of the survey enable BPANZ to illustrate clearly the importance of our industry to the economy. The first survey provided a valuable baseline of statistics which will act as a reference point for future years.

The 2006 survey was conducted in August and September of 2006 and was completed by 97 organisations (down from 116 in 2005). The results of the survey were released in December and show that the industry is in good heart.

- Between them, the organisations that completed the survey had a turnover of \$256 million and published 2266 new and 552 revised titles. People employed by the survey participants totalled 931.
- Small publishers make up a large part of the industry with 76 per cent of firms employing fewer than seven people.
- Education is the single largest category with nearly 40 per cent of new titles being categorised as educational.
- The participating publishers reported strong growth in export sales which accounted for 27 per cent of their collective revenues. The strongest markets were the US and the UK.

Whilst the total number of participating publishers in 2006 was down only slightly on 2005, it was disappointing to note that only 62 of the 116 organisations that participated in 2005 also took part in 2006. As a result of this we have formed a control group of publishers who participated in both the surveys, and their results are compared to help establish trends. Collectively these publishers accounted for 76 per cent of the total revenues reported. The encouraging thing is that in nearly every category analysed in the survey, the control group showed growth.

Thank you to all those publishers who took part in this year's survey. By now you should have received the full results, and they are also available on the BPANZ website. We hope you

find the results useful and that all members will continue to support our investment in the collection of data by completing the survey annually. Thank you also to CLL without whose support the survey would not be possible.

Tony Fisk, tony.fisk@harpercollins.co.nz

ACCREDITATION FOR EDITORS

Should editorial accreditation be introduced? How useful could it be? Ahi Text Solutions recently carried out an industry-wide survey of 18 employers and 88 editors for BPANZ and Whitireia Community Polytechnic, and the results are in. Accreditation will lead to a better tomorrow where skill, honesty and virtue reign. Conversely, accreditation will give bureaucrats a rope with which to lasso those who possess the free-roaming editorial genius so vital to our culture.

Or does the industry see the truth lying somewhere in between? On balance the industry is cautiously in favour of accreditation, and it seems from employer responses that if accreditation is credible it will in many cases affect employment decisions and it will place some upward pressure on pay rates. But editors and employers note that much depends on the crucial questions of how and by whom.

There are two main models for achieving accreditation – test/examination-based accreditation and portfolio-based accreditation. Overall, survey respondents saw more value in portfolio-based accreditation. A portfolio might include before and after versions along with client briefs, project specifications and editor–author correspondence. It allows experience and accomplishments to form the basis for accreditation. Experienced professionals can be accredited without sitting a test, and their buy-in is essential. However, portfolio-based assessment holds several problems: verifying that candidates’ work is their own; identifying assessors and a process for choosing them; dealing with confidentiality where a client may not want to release work to a third party; maintaining consistent standards across assessors; providing a pathway for newer editors; preventing capture by sectorial interests; and costs.

Many survey respondents made the point that tests provide a consistent, transparent standard. Tests could offer administrative advantages such as security and confidentiality. Several noted that tests are useful as an industry entry point, thus avoiding the catch-22 of needing to have worked in order to get work. But difficulties also exist: administrative, cost and logistical problems; issues of scope, genre and relevance; and problems with setting relevant, fresh (and culturally appropriate) tests. Many saw problems with the testing of one’s exam temperament rather than one’s editorial flair and ability. Experienced editors see little for them in a test regime, and if experienced editors choose not to become accredited, accreditation could ironically stand as a sign of inexperience.

If we do move towards portfolio-based accreditation should we establish a wholly New Zealand scheme or establish links with Australia? Opinion is fairly even. Among those who

supported joining or linking with the Australian scheme there was a feeling that there should be some way of building in New Zealand- and Māori-specific elements.

Much remains to be worked through before a proposal can be put to the industry. The survey report has gone to Whitireia and BPANZ, as well as an industry advisory group of editors convened by Rachel Lawson of Whitireia. The advisory group will comment on the way forward. Editors and employers want accreditation to work for the broader industry. If it works well it could lend greater credence to the profession. Editors and employers alike have offered many richly detailed and valuable suggestions on how obstacles may be overcome.

John Huria, john.huria@ahitextsolutions.co.nz

LAPHROAIGS ON THE YEAR AHEAD

We asked Tilly Lloyd, co-owner and manager of Unity Books (Wellington) Ltd, for a bookseller's view on 2007. She found her inspiration in a glass of fine malt whisky . . .

Independent booksellers will have much the same turnover on less volume. High street rents will rise another 60 per cent as Australian sportswear chains clog the works. The Americans will continue to publish heart-stoppingly beautiful books. New Zealand independents will decline to subscribe titles previously exclusive-to-a-chain. The independent booksellers will continue to direct-import and parallel import. Buy-local will continue to be mainly about food. New Zealand Book Month 2007 will be a success but stakeholders won't agree on the reasons why. Booksellers will lobby for more margin but the publishers will give it to the retailers. Several high-profile, charismatic independent booksellers will retire and sell. Some of those shops will then go down the gurgler. University bookshops will survive on reduced text supply without deep discounting. Library supply will decline as libraries become more like Hoyts. New Zealand mall culture will continue to colonise lifestyle blocks. Smaller New Zealand bookshop franchisees will haemorrhage. The New Zealand independents will not boycott *Harry Potter and the Deathly Hallows* on 21 July. Overdraft stress will kill off innovation in bookshop design and display. Booksellers will find that an expiry date on Booksellers Tokens does make the difference they predicted but to fewer punters than they predicted. More booksellers will print their own, thus inheriting the fiscal long tail suffered by Booksellers NZ. Whitcoulls will finally sell and redeem Booksellers Tokens again. Whitcoulls will remainder Bennetts. Dymocks group will strengthen as-is-where-is. Paper Plus will return to the (conference) fold. Conference will be Auckland-only from 2008. Borders will continue southern hemisphere expansion after Lambton Quay and Sylvia Park, all with minimum New Zealand inventory. More children's bookshops will thrive. More Christian bookshops will meet their makers. Loyalty cards will stay much as they are. Shoplifters will be dobbed-in by rare and secondhand booksellers. Booksellers will invest in better websites. Leaf Salon will bloom. Early version e-book hardware and software providers will let us down. Later versions will become as normal as 021, and that's only a few short years away. Distributors with web

ordering will improve their ISBN prompts so the 13-digit ISBN doesn't slow booksellers' buyers down. Invoices and credits and statements will bear a closer resemblance. Pacstream will wind up due to irrelevance. Amazon will consolidate its monopoly. Booksellers will receive more price and availability enquiries by text. The punters will carry on driving while they do this. People will continue to buy apartments across the road from their favourite bookseller so they can go there in their pyjamas.

Fabulous, salient and culturally significant local books will be published. BPANZ will stay married to Booksellers NZ. The number of independent publishers will slightly increase along with their market share. University presses will continue to lead the pack. Self-publishing will continue. Local publishers (multinationals in particular) will continue to publish dozens of rush-written, semi-edited and poorly designed non-fiction books that really should be four-page magazine articles. Multinationals will think medium-term and stop offering literary fiction as exclusives to chains. Genre-warp publishing will continue and *Brief Lives* will win the Lifestyle and Contemporary Culture category in the Montana New Zealand Book Awards and win the Spectrum Print Book Design Awards. Remaining New Zealand multinational distributors will increase talks with Australian counterparts. An Auckland merger will occur but Baker & Taylor will win the award for 2007 Distributor of the Year. Print on demand will not reach its iTunes moment (yet). Reps will continue as the cohesive force in the trade. Manga will hold. New Zealand manga will stay fringe. So will excellent New Zealand graphic fiction and non-fiction. The cost of paper stock, printing and international flights will continue to rise as bigger foreshores in Antarctica crash into the sea. 'A' formats will increase. Freight and courier charges will go through the stratosphere but reliability will stay in hell; hardly anyone will bother to change contractors. The Colmar Brunton survey on the New Zealand publishing industry will be fascinating as well as useful. Exporters (publishers and booksellers) will get central government support before the brink of the election, but it will not cover carbon tax. The New Zealand copyright laws will stay the same. New Zealand will continue to benefit from Australian copyright law. Creative NZ will continue 2006 policies. *Mister Pip* will win the Montanas. *Mister Pip* will win the Commonwealth and the Man Booker. Publishers will continue to call booksellers retailers despite the inaccuracy of the shortcut (never mind that it disses the specialists). Books will still be called product despite ditto.

Google will increase its monopoly as the primary information resource. Google will continue its full-text downloads lobby and more publishers will partner Google in digitisation. Other international publishers will continue to self-digitise their front and mid list and New Zealand publishers will increase their digitisation strategy in preparation for the e-market. Digital copyright will be an issue forever. Thorpe Bowker and Titlepage will be purchased by Nielson BookData which will then be purchased by Google. Glaucoma operations will increase. What was that thing, the fax? The long tail will lengthen and BookScan won't measure it. Literary authors will continue to reach the market. Blogging activity will increase but the number of well-written blogs will reduce. The *Listener* and the *Sunday Star-Times* will drop their book pages to one page as the norm. The New Zealand Society of Authors will strengthen.

Advertising will increasingly be web-based. Reducing ratings for radio and TV will continue. Author events and literary festivals will start to glut-out but they'll survive until the baby-boomers stop attending (say, 2015). The hardback will prevail, though less so. The paperback will simply prevail.

Tilly Lloyd

EAST GERMANY MEETS NZ

The sky was deep blue as the aeroplane soared away from Frankfurt and out of the northern hemisphere – ‘Now I am really far away,’ I thought to myself. With feelings of excitement and apprehension about my destination, I arrived in Auckland on 1 August 2006.

I am from Leipzig, a city of 500 000 people, in East Germany. My parents would never have expected that they could give me such a wonderful opportunity to travel — something they had never had in their youth, when East Germany was a staunch communist regime. Having grown up in that part of Germany makes me appreciate the freedoms I enjoy that my parents could not, like the liberty to choose my own career.

I am currently completing a degree in Book Trade/Publishing Management at the University of Applied Sciences of Leipzig. I am at the advanced level and as part of the curriculum we have to gain work experience for six months in media companies. With experience working in an advertising agency, and after completing specialisations in product development, design and market research, I applied to Reed Publishing (NZ) in Auckland. I knew of Peter Dowling, the publishing manager, through a friend. Peter gave me a warm welcome to one of New Zealand's largest and oldest publishing companies.

My time at Reed has taught me many things. It has given me a close understanding of how the New Zealand book and publishing market operates, which is quite different from Germany. I have gained insights into the work of different departments – editorial, design, marketing and export sales – and have improved my English.

Reed's staff have been very co-operative and kind. Through their help I have been able to work on many different and interesting projects, like the planning and production of a business book which is being published at the end of February 2007. I could also use my knowledge of copyright to contribute ideas about protecting copyright in print and on the Internet. I had fun designing Reed's posters and flyers for the 2006 Frankfurt Book Fair.

The New Zealand book market is small compared to that of my home country. Germany publishes more than 90 000 titles each year, compared to the New Zealand industry's 2300 new titles.

One of the most interesting things I've learned is about distribution of books in New Zealand. Book publishers here typically use more direct distribution, rather going through various wholesalers. I believe this provides a big opportunity for new authors to get into the market. By contrast, publishers in Germany have to sell their titles to big distributors before

the books get into shops. Our big wholesalers, which operate like logistics specialists, then distribute the books into the market. If a book is not in store, the bookshop will receive the book within 24 hours via an efficient ordering system. All of these stages put pressure on the profit margin, which is eroded by having to pay the large wholesalers and also due to the variety of the titles. As a result it seems that only major publishers get the chance to find a place in this market — and they must compete aggressively to release bestselling editions. Small publishing houses, or less well-known authors, seldom get the chance to attain representation in bookshops.

I think New Zealand can be proud of its publishing industry. While it is small in comparison to other countries, it is unique because it sustains a greater diversity of work by allowing a variety of talented New Zealand authors to enter the market.

I will go back to my country soon, taking memories of the awesome time that I had here. I'll finish my study, and maybe one day I'll come back to New Zealand.

Lysann Ploschke

DESIGN AWARDS CALL FOR ENTRIES

Publishers are invited to submit entries for the 2007 Spectrum Print Book Design Awards. This year's judges are Denis Welch, Beth Davies and William Chen. One winner and up to two runners-up will be chosen in each of the six categories: Best Book, Best Cover, Best Illustrated Book, Best Non-illustrated Book, Best Children's Book and Best Educational Book. Entries are open to books published in New Zealand in the 2006 calendar year. The books must have been designed in New Zealand, but there is no restriction on the place of typesetting, filmwork, printing, etc. Entries must be received by 5pm, Friday 30 March 2007.

For more information on how to enter, including conditions of entry, or to receive an entry form visit www.bpanz.org.nz or contact Arian Vitali at HarperCollins Publishers, 09 443 9400 xtn 824, arian.vitali@harpercollins.co.nz



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PO Box 36 477, Northcote, Auckland 1309
Tel +64 9 480 2711 • Fax +64 9 480 1130
bpanz@copyright.co.nz • www.bpanz.org.nz