

## A lovely kind of madness: Small and independent publishing in Australia

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for the Small Press Underground Networking Community  
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## Executive Summary

This research was conducted for the Small Press Underground Networking Community (SPUNC) to address the lack of information about the small and independent publishing sector in Australia and to provide SPUNC with information and inspiration to guide development of support initiatives.

The report

- » provides quantitative and qualitative data about the current activities of small and independent publishers around Australia and issues they face;
- » presents examples of other small press representative bodies and their particular initiatives that may provide inspiration or direction for SPUNC; and
- » offers suggestions, based on data collected and secondary research, about what SPUNC can do to help its members.

### **The independent publishing sector**

Australia has a diverse independent publishing sector, with a healthy mix of established presses and new ventures. It spans all genres of publishing, with a strong representation of fiction, particularly poetry and short fiction. Presses usually operate with very limited resources, and many do not receive funding at all. Despite this, there is a widespread sense of dedication and devotion to publishing new writers, providing high-quality content and maintaining the diversity of published work, where multinational publishing corporations may not be so supportive.

There are small and independent presses in every state and territory of Australia, but the majority are based in or near Sydney and Melbourne. The industry as a whole, not just the independent sector, tends to be focused in the eastern states.

Independent publishers in Australia operate on a scale ranging from just one or two publications a year and a turnover of under \$5000 up to 40 or more titles per year and a turnover in excess of a million dollars. One of the outcomes of this research is to provide a perspective on defining 'small press', which would help to define the sector's boundaries and thus allow definitive measures, such as the sector's financial value, to be established.

### **The issues**

Unsurprisingly, distribution and publicity remain the major difficulties for small and independent publishers. Relatively small print runs, low margins and a large area to cover mean commercial distribution services often don't suit small publishers, and a lack of resources (both financial and human) mean they often cannot put the necessary time and energy into publicity and marketing that a successful campaign requires. The problem of publicity is underlined by a general lack of attention from mainstream media, and low public awareness means less interest from booksellers, low sales and thus low print runs, which further compounds the problem of distribution.

Publishers would welcome collaborative initiatives under the guidance of a representative body like SPUNC to increase influence, share skills, reduce costs and generally provide a network of support.

## **Recommendations**

With recognition of SPUNC's current schemes to secure funding to employ an administrative co-ordinator and develop joint marketing catalogues, other short-term projects might be to:

- 1** Investigate potential distribution arrangements with The Australian Book Group.
- 2** Develop the SPUNC website, primarily as a source of information about SPUNC members and their titles, but eventually as a portal for small press news and resources (for both the public and SPUNC's members, and potentially the trade).
- 3** Ensure there is a prominent and readily available contact person for SPUNC, who can respond to enquiries and co-ordinate information.
- 4** Investigate potential (temporary) display spaces in libraries and independent bookstores.
- 5** Try to get a regular column or review space in a magazine or newspaper (for example *The Big Issue* or *mX*) or bookseller's newsletter, to feature a small press book or event each issue.
- 6** Build a library of resources for members, for example information on marketing and publicity tactics and where to go for business administration advice.
- 7** Investigate the models used by other small press representative organisations like Index and Independent Northern Publishers (both in the UK) – for example, the potential role of a co-ordinator and using direct-mail catalogues.
- 8** Conduct further research about small presses, particularly in the areas of employment and training, business strategies, use of resources and marketing/publicity strategies.

*Whenever anyone asks me if they should set up a publisher, I tell them not to, but to do it anyway. It's a form of madness, but it's a lovely kind of madness.*

- Ian Syson, Vulgar Press

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## Small and independent publishing in Australia

Publishing in Australia is an industry characterised by relatively small print runs, low margins, a large area to cover and a flooded market, yet according to Nielsen BookScan figures presented at this year's Newcastle Young Writers' Festival, the market is growing, in both fiction and non-fiction. Multinational corporations dominate the bestseller lists, but several independent Australian publishers have had significant success in the past decade, from household names like Allen & Unwin to the relatively recent successes of Scribe and Giramondo.

In the small and independent sector of the industry, publishers operate on scales ranging from break-even only and publishing one or two titles a year, up to 40 or more titles per year and a turnover in excess of a million dollars. These small and independent publishers are a healthy mix of established presses and new ventures, across all genres of publishing but with a strong representation of fiction, particularly poetry and short fiction.

Although the scope of the 'small and independent press' label is broad and somewhat unwieldy to use in defining the sector, the presses involved are characterised by a dedication to publishing new writers, providing high-quality content and maintaining the diversity of content published in Australia, and are run by publishers and staff who are often required to multi-skill and are usually low-paid or not paid at all.

There is a general lack of formal information about the sector, although networking and informal resource-sharing does happen between publishers who have a similar publishing style or focus. Through these networks and in the wider industry, there are generally acknowledged truths about small publishing – most notably its invaluable support for new voices and genres that larger publishers now consider too risky or commercially unviable, and the personal and cultural rewards it offers, rather than financial ones.

Small presses feel the pressure of distribution and publicity difficulties far more acutely than publishers in the broader industry because of their lack of resources, both financial and human, and these are usually the make-or-break issues that will decide a small press's fate. But there is hope: representative bodies like SPUNC have the opportunity to harness the immense dedication, experience and creativity of small publishers in collaborative marketing and publicity schemes.

## **The Small Press Underground Networking Community (SPUNC)**

SPUNC was formed in 2006 to advance the interests of the Australian small and independent publishing sector, and to facilitate co-operation between members of that sector.

SPUNC's goals are:

- » To network and support the efforts of the Australian small and independent publishing sector;
- » To improve the sector's engagement with the public (with a specific focus on collaborative marketing, publicity, and distribution);
- » To identify the issues which affect the sector;
- » To initiate and facilitate programs which contribute to the development of the sector; and
- » To actively represent members' interests to government and other organisations, where appropriate.

For more information, visit [www.spunc.com.au](http://www.spunc.com.au).

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## Survey of small and independent publishers

### Methodology

After initial consultation with the SPUNC working group, a survey was devised, tested and refined.

A list of around 120 potentially relevant presses was compiled from

- » SPUNC membership and mailing list
- » Suggestions from the SPUNC working group
- » Online resources for publishers and writers
- » *The Australian Writer's Marketplace* (Queensland Writers Centre, 2007-2008 edition)
- » Suggestions from survey participants

Ninety-three of these publishers were contacted by phone or email (where possible, first contact was by phone), and forty-six completed the survey.

The 46 presses included in this survey are:

The Australian Book Review	Interactive Publications
Aduki Independent Press*	Is Not Magazine
Agog! Press	Island Magazine
Australian Research Institute*	Kardoorair Press
Aurealis	The Lifted Brow
Black Pepper Publishing*	Little Hare Books
Boris Books	Lythrum Press
Brandl and Schlesinger	Modern Writing Press*
Celapene Press*	Overland Magazine*
Citrus Press	Page Seventeen*
Currency Press	Picaro Press
East Street Publications	Scribe Publications
Express Media*	Sleepers Publishing*
Finch Publishing	SminkWorks Books*
Flat Chat Press*	Total Cardboard
Ford Street Publishing*	Transit Lounge*
Gestalt Comics	Undergrowth
Ginninderra Press	Vignette Press*
Giramondo Publishing*	Vulgar Press
Going Down Swinging*	Wagga Wagga Writers Writers*
Griffith Review*	Wakefield Press
Hesperian Press	Walla Walla Press
Ilura Press*	Working Title Press

\*SPUNC members (19)

Twenty-eight respondents were asked three extra follow-up questions, about difficulties they've faced and how a representative body could help.

The full survey, including the follow-up questions, is included as an appendix to this report (page 65).

## **Risks and limitations**

### *Large scope, but limited time and resources*

Because of limited time and resources, I was unable to contact all presses identified. Presses were prioritised according to size and focus, based on the SPUNC working group's discussion of how they decide on membership applications and general comments made about the scope of their membership and potential defining criteria (such as size, number of authors, number of print titles published, if they operate on a fee-for-service bases). SPUNC members and presses recommended by the SPUNC working group were the highest priority.

'Small and independent publishers' is a very broad group, and encompasses organisations that vary wildly in terms of size, focus, structure, goals and activities. Constructing questions that would apply to all respondents and provide enough specific data to be useful and comparative, while still being easy to answer, was no easy task, and there is room for improvement in future research. Data that is potentially ambiguous has been noted in the results.

### *Sample*

The publishers surveyed were not standardised or balanced to provide a strictly representative sample of the industry (in terms of publishing focus and content or turnover), but are a selection of publishers who are operating within the broad criteria set by initial research and discussion with SPUNC.

This survey is not intended as a comprehensive or complete study of the Australian small and independent publishing sector – it is an indication of what small publishers are doing and the areas in which they could use some help.

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## Survey findings

### **A profile of small and independent publishers**

The majority of small and independent presses surveyed

- » Are in or near Melbourne and Sydney, although all states are represented except the Northern Territory
- » Publish fiction, particularly short fiction, and poetry (although usually not exclusively)
- » Have published fewer than 30 titles (for book publishers) or 10 issues (journal publishers) in total
- » Have published between one and ten titles in the past year (for book publishers)
- » Have an average print run of fewer than 2000 (often 1000 or fewer)
- » Are not members of the APA, because it costs too much
- » Have just one, two or three regular staff members
- » Have had 1 to 5 volunteers, interns or unpaid staff working for them in the past year
- » Have used 1 to 5 freelancers in the past year
- » Have an annual turnover of no more than \$50 000 (and often significantly less)
- » Receive funding of less than 5% of their income (half receive no funding at all)
- » Are registered as companies
- » Don't employ a publicist
- » Sell books online and at events as well as through bookstores

## **A profile of SPUNC members**

The nineteen surveyed SPUNC members tend to

- » Not use a distributor (13)
- » Have an annual turnover ranging from less than \$5000 to \$50 000 (11, compared with four who have a higher turnover and four who did not specify)
- » Publish a variety of content – usually fiction (both short and long), poetry and essays

The thirteen surveyed SPUNC members who publish books tend to

- » Have published fewer than 10 titles in total (8)
- » Have published fewer than five titles in the past year (9)
- » Have an average print run of up to 1000 (8, plus one who uses Print on Demand)

The ten surveyed SPUNC members who publish journal/magazines tend to

- » Have a print run of 1000-2000 (five, compared with three who have lower print runs and two higher)

(Note that some SPUNC members publish both books and a journal/magazine.)

Almost half of the SPUNC members surveyed were established in the last five years.

Half the SPUNC members surveyed receive funding, usually from state and federal governments.

## **Overview of findings**

### *Marketing and publicity*

- » Around a third of presses surveyed employ a publicist
- » 37% said publicity is something a representative body could help with (unprompted)
- » 36% see publicity as one of the biggest difficulties facing small and independent publishers (unprompted)

The small and independent publishers surveyed already successfully host launches, appear at events and promote themselves and their publications to the established writing and reading community, but find marketing to booksellers and getting media attention difficult. It's also hard to ensure good support and point-of-sale merchandising once a title gets stocked in bookshops. Many respondents commented on the enormous energy and dedication needed for good publicity – and most of them just don't have the resources to do it.

### *Online sales and marketing*

Small publishers have generally embraced online sales and marketing, because they can distribute information widely and reasonably cheaply; most are comfortable with email campaigns and online sales. These tactics are fantastic in strengthening existing audiences and capitalising on awareness created by other publicity, but do not easily reach beyond established audiences.

### *Distribution*

- » 41% of presses surveyed use a distribution service (a further four use a distributor for a specific area of their distribution but not in general)
- » 39% see distribution as one of the biggest difficulties facing small and independent publishers (unprompted)
- » 43% specifically mentioned distribution as a significant recent difficulty (unprompted)
- » 26% said distribution is something a representative body could help with (unprompted)

There is widespread frustration about distribution among the presses surveyed, particularly among the many presses who've been unable to secure a distribution arrangement because the cost is too high or their print runs are too small, and many presses indicated they would flock to an organisation that could provide a small-publisher-friendly model.

Several respondents specifically mentioned the need for a 'small publisher model' of bookselling that bypasses the current retail distribution and bookstore channels in favour of establishing direct channels of communication with readers (e.g. selling through launches, events and having authors on-sell their titles).

Several publishers have moved to a Print on Demand (PoD) model to reduce costs and keep titles in print. Some have books available internationally through online PoD sources, while others use a PoD model in a more local sense, printing as necessary but not via online distributors.

*"Small presses need really innovative selling practices...Keep distributors and booksellers out, to a degree, so they're not taking out their percentages. We need a new model of bookselling."*

*"Anyone who manages to crack the distribution problem would have so many people jumping on board. Anyone who's willing and able and has a good idea will have 50 presses running to them, with products."*

### *Funding*

- » 48% of publishers surveyed received no funding at all in the last 12 months
- » The vast majority of funding comes from state and federal government

There are no overall trends in funding for small presses – some rely on it, many would like more, some don't bother applying for it, and almost half of the presses surveyed survive without it.

There doesn't appear to be much correlation about age of press, number of titles published, staff numbers or annual turnover with funding levels, although the majority of newly-formed presses surveyed (established in the last five years) do not receive any funding.

Three publishers commented that they've stopped applying for funding as it requires too much time and effort for too little reward.

Four publishers say they receive some funding from their authors, and one more said they are being forced to consider moving to a fee-for-services model in order to remain viable.

### *Staff*

- » Three quarters of small presses surveyed have one, two or three regular staff members
- » A total of approximately 146 people regularly work in the 46 presses surveyed
- » A total of approximately 166 freelancers have been used in the last 12 months by the 46 presses surveyed
- » Almost a third of presses surveyed have no staff on a wage or salary scheme

Almost a third of publishers who were asked about the most significant difficulty they had faced in the last 12 months specifically mentioned the strain on staff that results from being under-resourced.

*"Multi-tasking is, and always will be, a major problem. Whereas large publishers can afford to employ specialists for various departments, a sole trader has to have some knowledge of a great many subjects. These include marketing, publicity, contracts, accounts, editing, proofreading, distribution, covers (layout etc)."*

### *Volunteers and training*

A total of 200 unpaid staff, interns, work experience students or volunteers worked for the 46 surveyed presses in the last year, including 50 who were involved in Express Media's Emerging Writers' Festival.

Of these, around a quarter (52) received practical industry training as part of their involvement. (If the Emerging Writers' Festival is included, where volunteers received training which may not have been directly related to publishing, this figure is 72.)

### *The APA*

Almost two thirds of the publishers surveyed are not members of the APA, usually citing cost as the reason, closely followed by a perceived lack of benefit or not feeling that the APA represents their needs. Several respondents also specifically commented that the APA doesn't look after the needs of small publishers. Lobbying the APA for more support or membership schemes that are viable for small presses are some of the ways respondents thought a small press representative body could help.

### *Sectors within sectors – children's publishers and SF/fantasy publishers*

While most small and independent publishers have common experiences, there seem to be particular groups that are set apart within the sector. Two speculative fiction (SF) publishers (one who is included in the survey, and one who was contacted and spoke briefly about their experiences but did not complete the survey) mentioned the tight-knit community of SF/fantasy publishers, who tend to be operating on a very small scale and who sell to a well-defined and cohesive market. Children's publishers also appear to operate in a different market, perhaps because of a similarly well-defined audience and established retail sales markets. The market for children's books is no less competitive than any other kind of publishing, but many independent children's publishers (e.g. The Five Mile Press, Black Dog Books, Working Title Press, Little Hare Books) maintain significant lists and have print runs in excess of 3000, often 5000-6000.

*"I've been connected to the Australian speculative fiction scene for a very long time... When it came to needing authors or needing publicity, there were people around me. Small presses who work in SF all help each other, we're quite connected to each other. We don't look outside our genre. We feel quite ghetto-ised, but it's a very friendly environment to work in."*

### *The value of small presses*

Without doubt, the overwhelming response from the publishers surveyed was that despite the difficulties faced by small publishers and the hard work involved for often minimal financial reward, small publishing is a rewarding, satisfying and above all *necessary* part of the cultural landscape.

Aside from small publishers' widely acknowledged role in finding and developing new authors, small publishers ensure local content (both fiction and non-fiction) has a presence, and are able to be closer to their audience to encourage a community of readers and writers.

The breakdown of content published by the surveyed presses proves that while the large publishing companies are often reluctant to consider (let alone publish) short fiction and poetry, small presses revel in them.

### *Difficulties for small and independent presses*

Unsurprisingly, distribution and publicity were the most commonly mentioned difficulties for small and independent publishers. Other difficulties mentioned (without being prompted) were a lack of funding and resources, lack of support from booksellers and problems with point of sale merchandising, maintaining readership or not having enough readers, the general difficulties of running a business and the strain on staff these difficulties create.

### *How SPUNC can help*

Most publishers who were asked what a representative industry body could do to help them said that the problems of distribution and publicity could best be tackled by collaborative efforts under the guidance of a group like SPUNC.

Ideas about how SPUNC could help with publicity generally fall into two categories – joint publicity and marketing instigated by SPUNC to reduce costs and increase influence with media, booksellers and the public (for example, SPUNC’s proposed catalogues), and helping publishers themselves gain skills in publicity and marketing (for example, through workshops or skill-sharing programs).

Other areas in which publishers feel a representative body could help include lobbying the APA for more support and recognition (e.g. by creating a pricing scheme that is viable for small presses), promoting small presses in general, networking and skills-sharing between publishers, providing information on funding and advertising opportunities, and generally investigating ways of working collectively.

Comments about the value of small presses:

*"It's hard but intensely rewarding."*

*"It's the small presses who keep the short story alive as an art form."*

*"In general we believe that small press is flexible and has the opportunity to present new or under-represented kinds of writing to audiences."*

*"Independent publishing is very difficult, but it can also be tremendously rewarding. It makes little economic sense for the major publishing houses to be involved with poetry and short fiction because the sales figures seldom justify their normal print run and they hardly ever promote these titles. Small and niche publishers have much more potential to be successful there."*

*"Small and independent presses are crucial to the diverse life of any country's culture."*

*"With big publishers being more cautious, there's a huge role for small and independent publishers, who can use events, use the community, use launches and small publisher models. Every generation needs to create their own infrastructure, and needs to publish and read books written by their generation."*

*"Small publishers provide vital diversity in a growingly faceless landscape of multinational publishing houses and disinterested bookseller chains."*

*"Small publishers are vital to a healthy culture."*

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## Other relevant organisations

### **The Australian Book Group**

<http://www.australianbookgroup.com.au/>

The Australian Book Group (ABG) is a book distribution company founded by a group of publishers as a co-operative effort to pool resources, minimise overheads and provide profitable distribution to its publisher members. It was established in 1992, and now distributes for around 130 members.

The Australian Book Group:

- » Is run by a board of publishers as a not-for-commercial-profit organisation
- » Has a warehouse and customer service center in Drouin, Victoria
- » Has about 25 sales representatives based around Australia, including Darwin and Perth
- » Covers the New Zealand market
- » Facilitates dealings with non-trade outlets, bookclubs, libraries and specialist wholesalers
- » Produces four catalogues a year and occasional specialist catalogues (genre or subject-specific) to promote members' backlists
- » Distributes journals, although not to newsagents (due to the difference between bookstore and newsagent distribution models which the ABG has not yet successfully negotiated)

Catharine Retter, chairperson of the ABG, says the group has a co-operative spirit where publishers are members, not clients, and information and skills are shared between publishers. "We get really excited when one of them has a new title; it's a family kind of feel – sharing information, helpful, not competitive."

According to Ms Retter, ABG fees are 4-5% lower than other distribution companies, and funds generated are put back into the organisation to keep fees lower and provide better services for the publishers.

Membership of the ABG is judged on a case-by-case basis, with the proviso that each member "has a commitment to full-time, professional publishing and developing a list of titles" – but there are also arrangements to suit one-off publishers, self-publishers or organisations whose focus is not publishing, via Landmark Press (a member of the ABG).

Ms Retter mentioned that the arrangement with Landmark, where they represent a number of smaller publishers to the ABG who then act as distributor, might also be applicable to SPUNC. She said the ABG board would welcome discussion with the SPUNC working group about possible distribution arrangements.

## **Representative bodies and development initiatives in Northern England**

Index and the Independent Northern Publishers Group (INP) were formed for many of the same reasons as SPUNC, with collaborative publicity and distribution and raising member's individual profiles as well as a collective 'brand' as central goals. Both organisations operate on a similar scale to SPUNC – Index has 53 publisher members, INP has 17. Thirst, a catalogue-based bookclub selling independent publishers' titles direct to readers is another initiative to boost sales, based in Yorkshire. All are well subsidised by Arts Council England.

The development, initiatives and impact of all three organisations are well described in *Independent Publishing in the North West*, a report made to Arts Council England in 2004, but the following points, drawn from the report, might be of particular interest to SPUNC.

Note: Unlike SPUNC, INP and Index focus specifically on literary publishing, and do not represent publishers of non-fiction.

### **The Independent Northern Publishers' Group (North East England)**

<http://www.northernpublishers.co.uk>

<http://www.literaturenortheast.co.uk>

- » Employs a co-ordinator for three days a week, who works from home to manage administration, publicity/PR, processing and distribution, some repping to bookshops and is on-hand to help members with information, enquiries and advice
- » Produces a printed catalogue which is sent to a mailing list, bookshops, libraries and book fairs
- » Sells online from its website (which constitutes three quarters of their sales, compared to offline sales from the catalogue)
- » Provides a central contact point for members, the trade and the public
- » Manages processing and distribution of orders, including magazine subscriptions – although this seems quite limited, and is managed by the co-ordinator from her home. INP takes a cut of 10% for offline sales and 30% for online sales.
- » Works with libraries to host reading groups and buy library copies of members' publications (at a discount)
- » Has a presence at book and zine fairs, and has held local events including 'branded' launches and fairs, sometimes 'piggy-backing' with other events.

#### *Key points*

- » Because INP is now one of Arts Council England's Regularly Funded Organisations, the steering committee has been able to make long-term plans and employ experienced staff
- » INP's website has been its biggest success, because most members previously had no e-commerce facilities

## **Index** (North West England)

<http://www.publishingnorthwest.co.uk>

<http://www.literaturenorthwest.co.uk>

- » Explores ways for publishers to work together – for example, joint marketing and profile-raising
- » Hosts the Literature North West (events listings, author information, news, online sales) and Publishing North West (online sales, contacts for trade and libraries) websites
- » Hosts networking meetings
- » Produces a printed catalogue for libraries, wholesalers and reading groups

## **Thirst**

<http://www.thirstbooks.com>

- » Produces three or four direct-mail catalogues per year, sent straight to customers to prompt direct sales
- » Was developed to work around the problem of getting stock into high street/chain bookstores
- » Is pitched to the audience as discovering new writing, going beyond the chain bookstores, being 'independent thinkers'
- » Had 666 members after a year of operation, compiled from publishers' existing contact lists and some commercial mailing lists
- » Is well subsidised, allowing prices to be significantly reduced for special offers
- » Returns 60% of the cover price to publishers
- » Processes orders through an organisation who is a member of the scheme, who receives a monthly fee (for warehousing costs) and a percentage of orders processed
- » May have closed down, as the website is unavailable

### *Key points*

- » Targeting and branding of the catalogue, in terms of tone and design, was crucial
- » Need a good range of titles and consistent quality
- » Discounting is an important factor – prices offered in Thirst were often lower than when purchasing direct from publishers, and allowed readers to take a risk.

## **Large-scale independent publishers' organisations – US and UK**

### **The New York Centre for Independent Publishing (US)**

<http://www.nycip.org>

### **The Independent Publishers Guild (UK)**

<http://www.ipg.uk.com/>

Both the New York Centre for Independent Publishing (NYCIP) and the Independent Publishers Guild (IPG) have large membership bases (in excess of 400-500) and focus on promotion of the sector as a whole and professional development for individual publishers.

Both NYCIP and IPG:

- » Offer skills development seminars and workshops
- » Host an annual conference
- » Provide online resources about publishing for authors, readers and publishers alike (although most of IPG's resources are members-only)
- » Host/sponsor annual awards for independent publishers
- » Have a presence at international book fairs
- » Have extensive online databases of members, and some listings of other services (freelancers, printers etc)

Some specific initiatives of NYCIP are:

- » National Small Press Month and the Independent and Small Press Book Fair
- » Significant discounts for members on services from 'partner' companies, e.g. 50% off advertising space in the *New York Times Book Review*, cheaper subscription to industry magazines, discounts on publicity, design and printing services
- » A display table at a major library, where readers can browse and order titles

The IPG provides:

- » Access to resources from the Publishers Association (UK), e.g. the *Global Publishing Information* database
- » An online forum where members can ask questions of each other and share experience and skills
- » Access to business support (including business law and tax help) through an arrangement with an external business consulting group

## **Trade associations in the US**

### **PMA, the Independent Book Publishers' Association (US)**

<http://www.pma-online.org>

### **The Small Publishers' Association of North America (US)**

<http://www.spannet.org>

PMA and the Small Publishers' Association of North America (SPAN) are trade associations for independent publishers, with a focus on business services rather than promoting the sector as a whole or developing the 'culture' of small publishers. Their primary benefits are joint marketing opportunities (for a fee), information and training resources and discounts on services.

#### **PMA:**

- » Produces and distributes marketing materials for members (for a fee), including catalogues, direct mail and marketing materials for libraries, booksellers and media
- » Buys advertising space in trade publications for co-operative promotions
- » Acts as a distributor for some titles, but this is done on a very selective basis
- » Hosts an online rights marketplace for members
- » Has an online catalogue of all members' titles
- » Arranges booth space at national and international book fairs

#### **SPAN:**

- » Offers training advice and resources
- » Offers discounts for 'partner' companies

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## Definitions of 'small press'

Within the publishing industry, there is a common understanding of what constitutes the small publishing sector but very few definite measures. That small presses be independent of large corporations is self-evident, but beyond this the scope of the sector is hard to define.

While this general understanding is only occasionally discussed explicitly, it apparently incorporates criteria such as:

- » Having fewer than X titles in print
- » Publishing fewer than X titles per year
- » Having an average print run of less than X
- » Have an annual turnover of less than \$X
- » Having a particular publishing philosophy

One of the only independent publishers' organisations to put quantitative measures on their interpretation of 'small press' is the New York Center for Independent Publishing (NYCIP), who say on their website:

The loose definition which we use for a 'small press' is a publisher whose print runs usually do not exceed 5,000 per book and who produces fewer than 12 books per year.

Obviously the boundaries of these categories, particularly print run size, are relative to the size of the broader publishing market.

Publisher membership of the NYCIP (as opposed to 'Friend' or 'Corporate' membership) is open to:

... all independent book, journal, audio and electronic publishers. Publishers who charge the cost of production, editing or distribution to the author, whose business model is primarily to sell books back to the author, his/her family and associates are ineligible.

For further research and discussion about small presses in general, see the articles listed in the Links and Resources section of this report on page 62.

## **Suggestions for an Australian definition of small press**

There is no reason to change SPUNC's current case-by-case membership approval or to introduce strict criteria, but as the small publishing industry develops and more research is done, rough guidelines may help to determine the scope of the sector and to describe it to those outside the industry.

Based on survey data collected, other organisations' definitions of small press, SPUNC's current membership and the SPUNC working group's discussion of how they judge membership applications, potential guidelines for 'small press' are independent publishers who:

- » Have published at least one book title or journal issue (in hardcopy)
- » Have an annual turnover of \$500 000 or less
- » Have print runs of usually less than 2000
- » Have published more than one author
- » Publish fewer than 10 book titles per year, and
- » Usually do not charge authors fees for production, editing or distribution.

These are generous criteria, and include all but one member of SPUNC (Ford Street Publishing, who have a higher print run but fall within the other categories), and should be used as guidelines rather than strict measures.

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## Conclusion

While nothing short of a radical shake-up of the whole book industry and an instant shift in readers' awareness and buying practices will drastically change small and independent publishers' fortunes, there are several opportunities to develop the sector and improve small presses' outlooks by working collectively under the guidance of an organisation like SPUNC.

Most small publishers (including those in the SPUNC working group) know that small presses can greatly improve their influence by working together, but what is missing is the impetus – in terms of the right people coming together with the right ideas and resources at the same time – to make things happen. SPUNC is already well on its way to creating this impetus, and only needs to continue investigating opportunities, finding resources and acting collectively to see potentially great results.

Distribution will always be a problem for publishers – the combined effects of a crowded market, a geographically wide distribution area, low margins and relatively small print runs affect most publishers in Australia, regardless of turnover or corporate power. Commercial distribution companies face these same difficulties, and also struggle with low margins. A publisher-run distribution group like The Australian Book Group has the potential to remove one layer of margin, allowing more profit to flow back to the publisher or into better distribution.

Publicity and distribution are the underlying causes of many of the other problems that survey respondents identified, like a lack of resources and strain on staff. Co-operative efforts to address the major issues and establishing a network of support and collaboration will likely release the pressure in other areas of small publishers' businesses.

Despite the oft-mentioned difficulties that small presses face and the sometimes exhausted publishers, there is a strong core of passion, energy and enthusiasm that is the driving force of the sector, and there are many experienced, resourceful and creative people who are dedicated to making small presses work. SPUNC is a great example of these kinds of people working together, and has the potential to be a focus point and guiding force for successful collaborative initiatives in the sector.

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## Recommendations

In light of the survey findings, publishers' comments, SPUNC's current activities and inspiration drawn from overseas small press representative bodies, it is recommended that the SPUNC working group:

### **1 Investigate potential distribution arrangements with The Australian Book Group**

Rather than setting up new distribution infrastructure, a feasible way for SPUNC to provide distribution services for its members is to represent them as a whole to an existing service provider.

The Australian Book Group's publisher-led, not-for-profit model is designed to work for small and independent publishers, and could potentially provide the established infrastructure and systems necessary to distribute SPUNC members' titles at a low cost. Catharine Retter, chairperson of the ABG, said they would welcome further discussion with SPUNC.

### **2 Develop the SPUNC website**

As a common first point of contact for the public (after initial awareness), the SPUNC website should have a focus on promoting its members and their titles as well as SPUNC's goals and activities.

As resources become available and SPUNC's interaction with the public grows, a mailing list and news and events listings could help develop the site into a portal of information for readers, writers, publishers and potentially the trade.

An online SPUNC bookstore would provide a central point of availability for all members' titles, but the time and resources needed to maintain the system, as well as to process and distribute orders, would need to be weighed against the potential benefit to members, many of whom already have e-commerce facilities.

For inspiration, see the Independent Northern Publishers (UK) website:  
<http://www.northernpublishers.co.uk/>

### **3 Ensure there is a prominent and readily available contact person for SPUNC**

As with any organisation, administrative co-ordination and managing information take time and resources – but are crucial to providing efficient service both to members and those who deal with the organisation from outside.

As SPUNC's reputation and scope grows, there needs to be a first point of contact for both members and those outside SPUNC, who can facilitate communication, respond to enquiries and take responsibility for administrative tasks.

#### **4 Investigate the potential for temporary display spaces at libraries and bookstores**

While it may not permanently address the problems of merchandising and point-of-sale display in stores, temporary displays of small press titles will at least bring small presses into the spotlight and get their titles into the hands and minds of readers.

Potential spaces might be a sympathetic independent bookseller, or an inner-city library (for example the City Library in Flinders Lane, Melbourne). Libraries could purchase copies at a discount for display and loan, while booksellers could be encouraged with in-kind support from SPUNC and the hope of extra sales.

#### **5 Push for regular media space**

Some book review spaces, particularly booksellers' newsletters, are often looking for cheap ways to get their reviews – so perhaps SPUNC could volunteer a review for each issue, covering a new release small press title or event.

The focus could be rotated amongst SPUNC's members, depending on new releases and the audience of the publication, and reviews could be written by SPUNC members' interns or volunteers.

#### **6 Build a library of resources for members**

While many small presses are run by experienced and canny publishers, several survey respondents mentioned the need for help in developing their skills, particularly in marketing and publicity.

Using recommendations from members or existing resources, SPUNC could start with information on

- » where to go for business advice (i.e. advice about running a small business, not necessarily related to publishing)
- » marketing and publicity tactics on a low budget, and
- » how to investigate potential niche markets and alternate sales avenues.

As resources become available, SPUNC could look at hosting workshops or skill-sharing seminars with professionals from the wider publishing industry.

For inspiration, see Laughing Bear Press's collection of very practical, small-press-related articles on their site at <http://www.laughingbear.com>.

#### **7 Investigate the models used by other small press representative groups**

Index and the Independent Northern Publishers both have apparently successful models of sector representation, on a feasible scale. Independent Northern Publishers have benefited from employing a co-ordinator, while Index focuses on sharing information, resources and skills between publishers. Both have initiated successful collaborative marketing initiatives and catalogues.

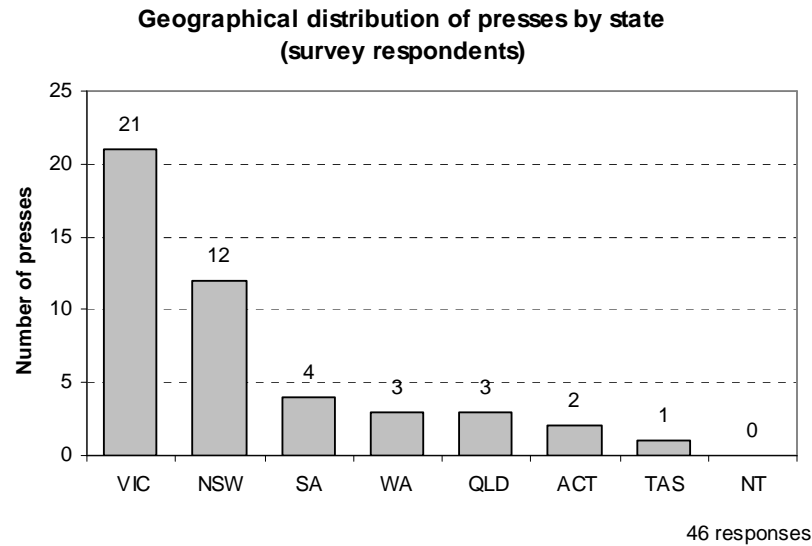
## **8 Conduct further research**

Further research into small publishers would be immensely valuable in devising targeted support schemes and potentially attracting funding. Using the *Independent Publishing in the North West* report as a template, research could be conducted about:

- » Employment (number of staff, working hours vs pay, number of staff also working other jobs, staff roles and expectations)
- » Training (how it happens, level and depth, who, where trainees go)
- » How income is spent (percentage on production, distribution, administration, staffing, marketing)
- » Marketing methods, and what has proved successful for publishers.

## Survey data

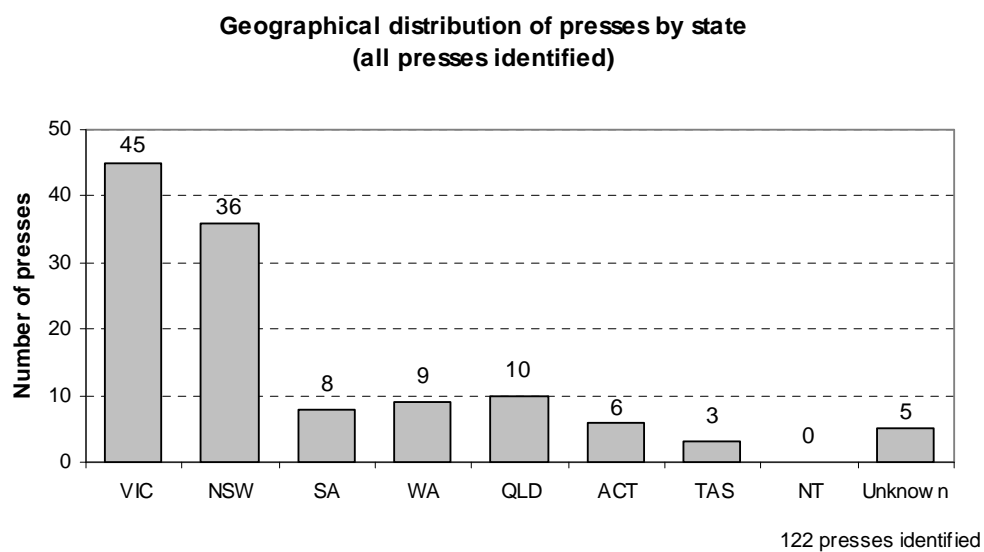
### Geographical distribution of presses



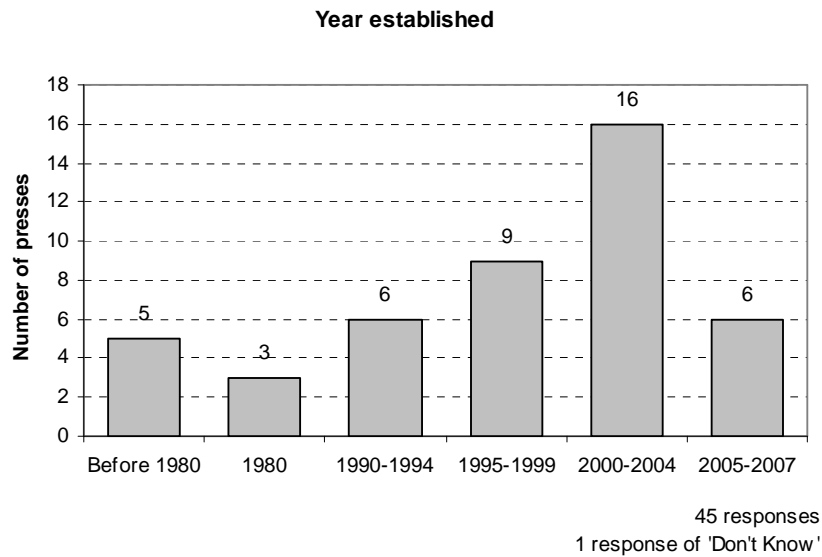
Unsurprisingly, the majority of respondents are based in the eastern states, and are concentrated on Melbourne and Sydney (although several presses specified that they are based outside the capital cities).

These results echo the distribution of the 122 small and independent publishers identified in the initial stage of this research.

The majority of SPUNC members are in Victoria (15 of 19 surveyed).



## Year established



The most recently established press surveyed is Ford Street Publishing, an imprint of Hybrid Publishers created in 2007. The longest-running is Overland Magazine, which has been operating since 1954.

### *Age of press and core publishing activities*

Of the five longest-running presses, three are journals and two are book publishers. Four of them use a distributor, although not exclusively (i.e. still manage some distribution themselves).

Of the six presses formed in the last two years, two produce books, two produce journals and two produce both journals and books. Four are in Victoria, one is in Western Australia and one is in Queensland. Only one of them receives funding.

### *Recently established presses and funding*

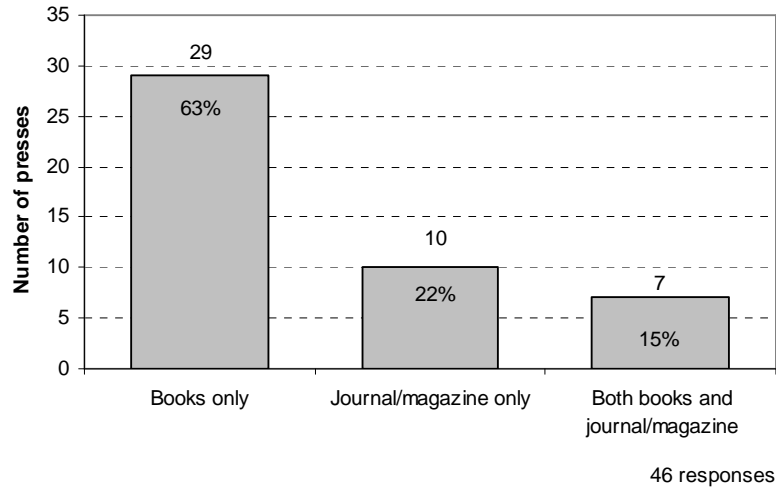
Of the 22 presses formed since 2000, only eight receive funding of any kind (one described the funding as insignificant – ‘.00001%’ of their turnover). Two of the funded presses are attached to universities.

### *Age of press and SPUNC members*

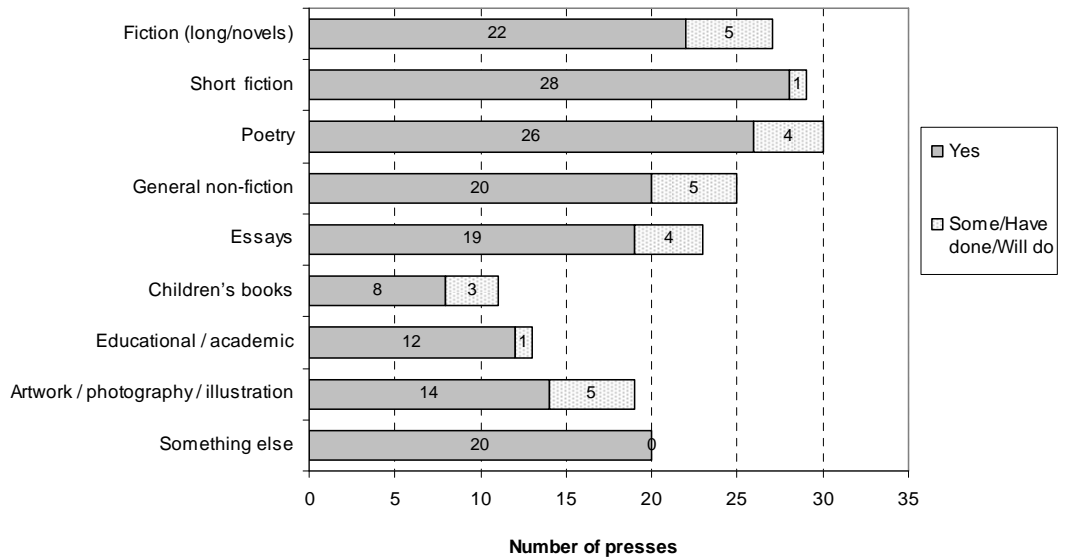
There is no obvious correlation between age of the press and SPUNC membership (both the longest-running and the most recently established presses in this survey are members of SPUNC).

## Publishing activities

### Publishing focus



### Published content: Do you publish ...



When asked the "Do you publish... ?" (with prompted categories), the vast majority of respondents specified more than one genre, and the majority specified three or more.

'Something else' includes

- » Narrative non-fiction (including memoirs, biographies, histories)
- » Reviews and commentary
- » Comics and graphic novels
- » Political cartoons
- » Drama/plays
- » Corporate and funded/sponsored books
- » Spoken word (on CD)
- » E-books and audio books

Respondents who said they publish artwork, photography and/or illustration generally specified that it was as part of a collection (i.e. in a journal, or with short stories and poetry) as opposed to purely visual art collections.

The low representation of children's publishers is probably a result of the selection of presses contacted. Children's presses were not deliberately ignored, but often did not come under the broad scope of the survey as determined by early research and discussion with SPUNC (see Risks and Limitations on page 6).

#### *Content and SPUNC members*

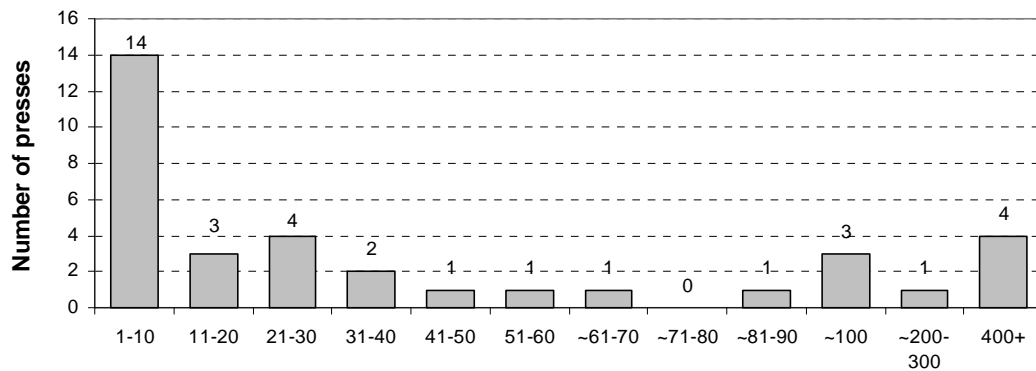
There is no apparent correlation between SPUNC's members and content type, except that they tend not to focus on children's books or specifically educational/academic titles.

*"It's the small presses who keep the short story alive as an art form."*

*"I'm moving away from fiction, because I just don't think that there's the place in the mass market for independently published fiction any more. It's sad, because that's why I set the press up. [I've got] lots more optimism when it comes to non-fiction."*

## Number of publications (total)

Number of titles published (books)



35 responses

Excludes respondents who only publish journals/magazines but includes 7 respondents who publish both books and journals.

One respondent gave no answer.

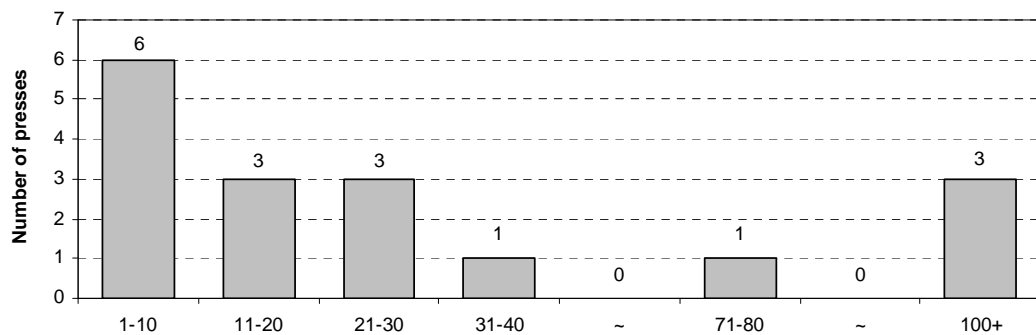
NB: Some figures, particularly in the categories over 50, and publishers' estimates.

The 14 respondents who have published more than 30 books tend to

- » Have been established more than ten years ago (8)
- » Have published ten or more titles in the last 12 months (11)
- » Have an annual turnover of \$50 000 or more (7; four more did not specify turnover)

The 21 respondents who have published 30 books or fewer tend to have been established in the last 10 years (15)

Number of issues published (journals)



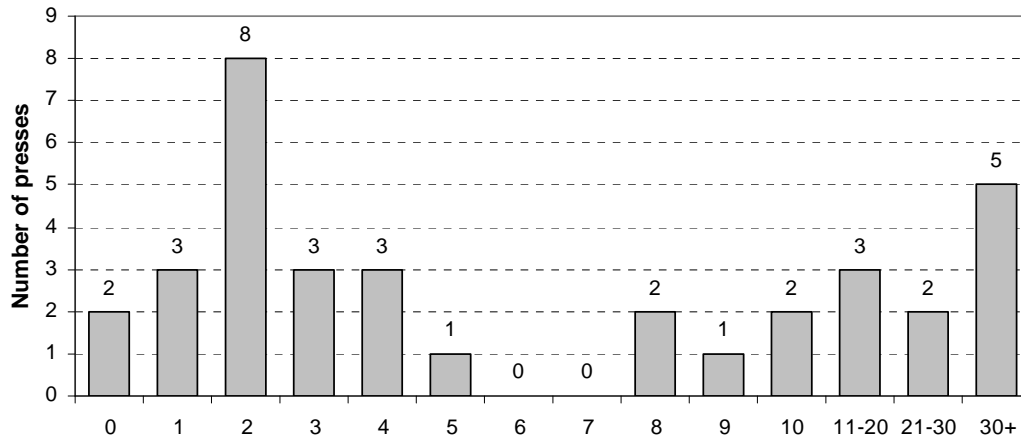
17 responses

Excludes respondents who only publish journals/magazines but includes

7 respondents who publish both books and journals.

## Number of publications in the last 12 months/per year

Number of book titles published in the last 12 months



35 responses

Excludes respondents who only publish journals, but includes 7 respondents who publish both books and journals.

One respondent gave no answer.

A total of approximately 366 book titles were published by the 46 presses in the last 12 months.

The 15 respondents who published more than five books in the past year tend to

- » Be members of the APA (10)
- » Have print runs of 2000 or higher (9)
- » Use a distributor (9)
- » Have an annual turnover of \$100 000 or more (9, with a further four who did not specify turnover) (NB: these are not the same nine that use a distributor)

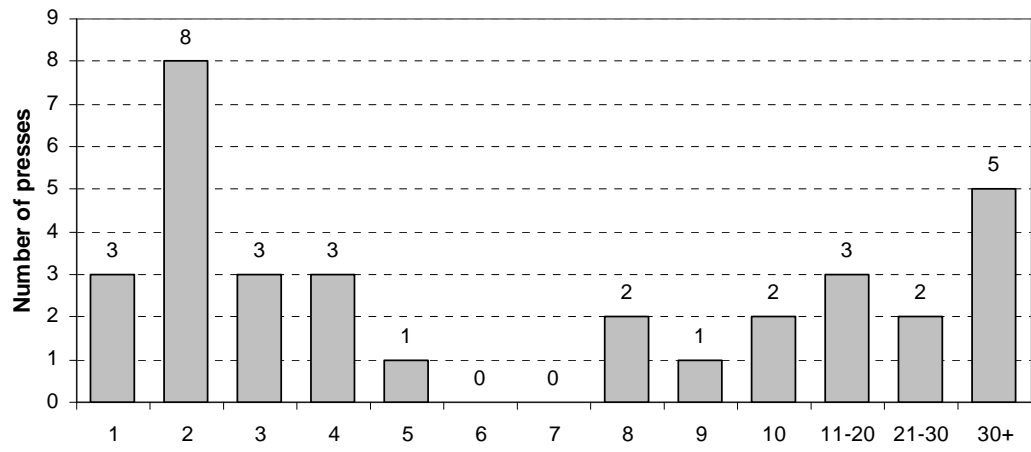
The 20 respondents who published five or fewer books in the past year tend to

- » Have been established within the past ten years (14)
- » Receive no funding (13)
- » Not be members of the APA (18, and one who has applied for membership)

### *Number of titles in the last 12 months and SPUNC members*

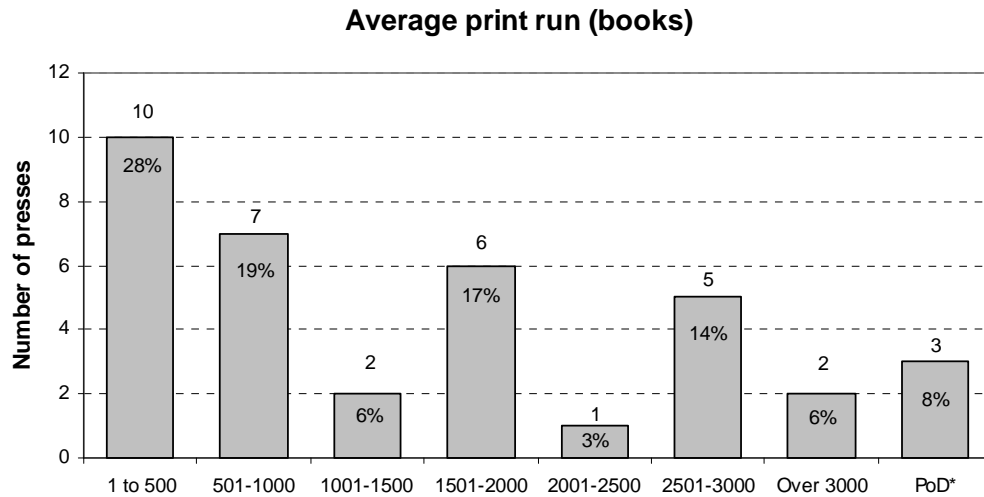
Most surveyed SPUNC members (who publish books) have published one to four titles in the past year (8 of 13, and one more who did not release any titles in the last year).

### Number of issues per year (journals/magazines)



17 responses

## Print run



36 responses

\*Print on Demand. Two of the three PoD publishers specified an initial set print run of 150-300  
Another publisher also uses PoD for some titles, but specified an average print run of ~1000  
NB: Where respondents specified varying print runs (e.g. for different genres), the higher average print run was used.

Many respondents noted that there is no 'average' print run – each print run is decided on a title-by-title basis, particularly for poetry or locally-specific titles.

### *Print run and turnover*

The size of print run does not directly correlate with turnover – two presses whose average print run is under 500 have an annual turnover of \$100 000-\$500 000, probably because they each produce 35-40 titles per year.

### *Print run and funding*

The majority of presses whose average print run is 500 or lower receive no funding at all (8 of 10).

### *Print run and genre*

The three presses whose main audience is young readers (children or young adult) all have average print runs of 3000 or higher.

Respondents who publish poetry as well as other titles often specified a print run for poetry titles of 500 or fewer, regardless of their average print run for other genres.

### *Print on Demand*

Two of the publishers who use Print on Demand technology, Interactive Publications and SminkWorks Books, have strong digital publishing and marketing strategies – as well as Print on Demand, their titles are available in multiple e-book formats across platforms, including digital, audio and multimedia publications.

The other two respondents who use PoD are more print-focussed – Agog! Press and Picaro Press appreciate the benefits of keeping titles perpetually in print while keeping printing costs down.

*"[Our titles are] in print and perpetually available. Has taken a lot of the cost out of for me. I just do small runs to cover review copies, author copies, hand-selling. Costs \$1000 for a title instead of \$5000. Anyone can buy them anywhere."*

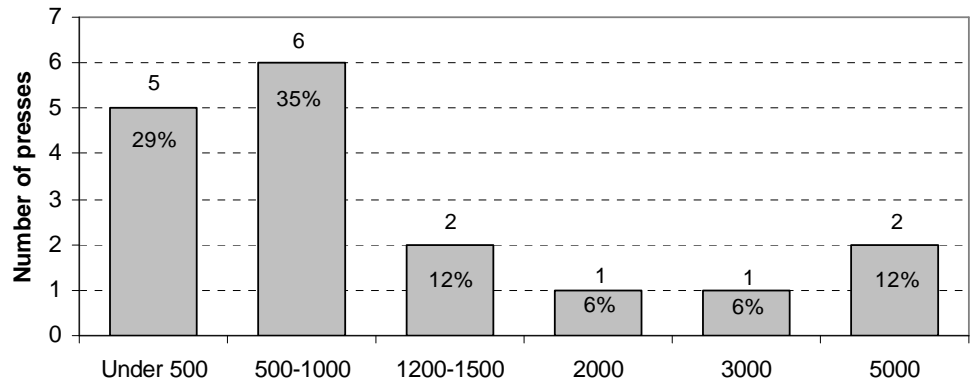
*"PoD, if it really did work, would be a big thing for us. If I could package a book and sell four units if four units were ordered, it'd work. The model where you have to print 100 anyway then they'll print 10 every now and again, it doesn't work. Need a way of cutting out the middle man."*

[A book publisher who doesn't use PoD although would like to. They mentioned the benefits of a PoD self-service 'kiosk' model, where a customer can select, pay for and print out a book, without hardcopies being handled by distributor and booksellers.]

*"We tried 'conventional' book publishing (commercial printers, print runs of 500 or so, distribution through bookshops) at the beginning and didn't do well, so the current model (demand publishing, sales by [authors who are] performers) evolved as a viable, low-cost alternative. We'd like to do more, but it isn't on."*

[A publisher who doesn't use online-delivery PoD, but has adopted the demand-model of printing]

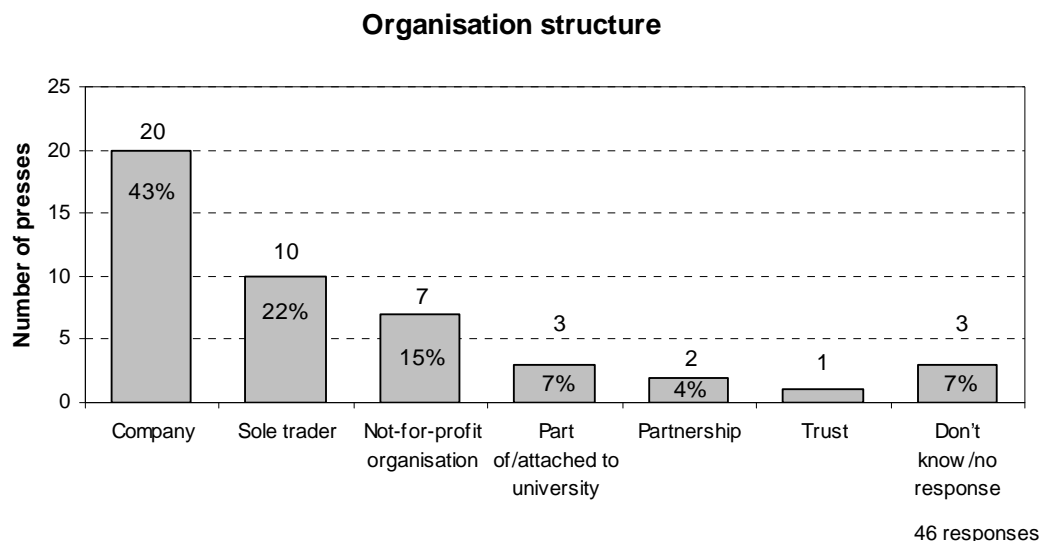
### Average print run (journals/magazines)



17 responses

Of the six journal/magazine publishers who print over 1000 copies, four are attached to or supported by universities.

## Organisation structure



### *Organisation structure and turnover*

Presses with an annual turnover of \$50 000 or more tend to be companies: in the \$50 000+ turnover range there are 11 companies, four not-for-profit organisations and one sole trader.

Four of the five presses with an annual turnover of less than \$5000 are sole traders, although sole traders are represented throughout the turnover ranges.

### *Organisation structure and funding*

- » Only one sole trader of the 10 interviewed (10%) receives funding.
- » Four of the seven not-for-profit organisations (57%) receive funding.
- » Thirteen of the 20 companies (65%) receive funding.

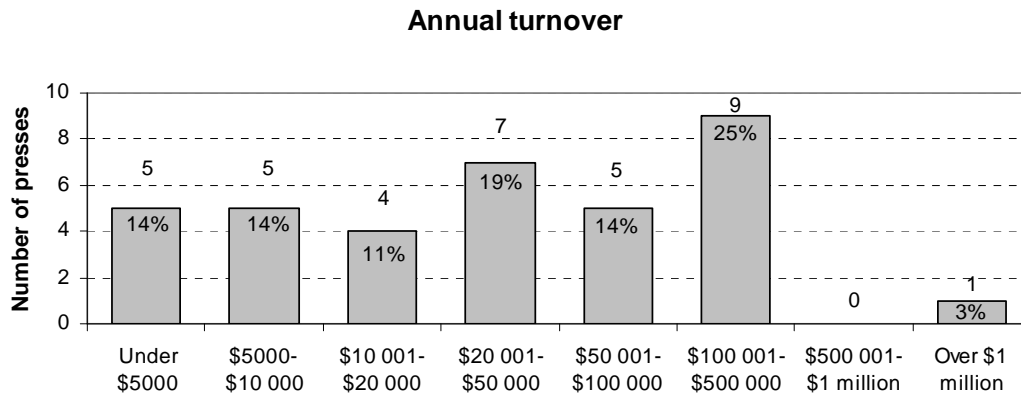
### *Organisation structure and SPUNC*

Of the 19 surveyed members of SPUNC, seven are sole traders, four are companies, three are not-for-profit organisations, three are part of or attached to universities, one is a partnership, and one gave no answer.

*"[I] chose a sole trader because I didn't realise the options. Being like that, without being specifically not-for-profit, we're restricted in applying for funding."*

[Journal publisher]

## Annual turnover



36 responses

10 'No answer/don't know' responses have been discounted so that percentages are representative.

### *Annual turnover and age of press*

The majority of presses established in the last five years have an annual turnover of less than \$50 000 (13 of 18, with four 'no responses').

### *Annual turnover and distribution*

Nine of the 15 publishers with a turnover of \$50 000 or more use a distributor (60%) (and one distributes their own books as well as others').

Only one of the 10 presses with a turnover of \$10 000 or less uses a distributor (10%) (another uses Amazon PoD for international distribution, but not for general local sales).

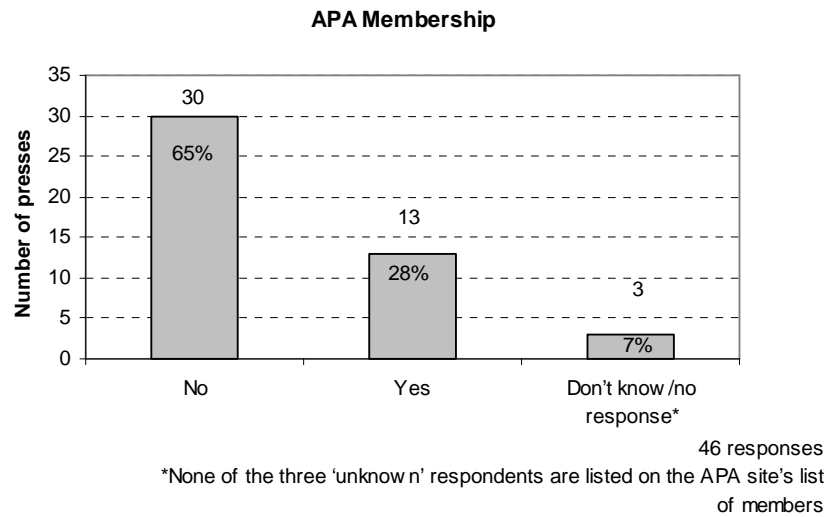
### *Annual turnover and funding*

- » None of the presses with an annual turnover of under \$5000 receive any funding
- » Of the 10 presses with an annual turnover of \$10 000 or less, only two receive funding (20%)
- » Eight of the ten presses with an annual turnover of over \$100 000 receive funding (80%)

### *Annual turnover and SPUNC*

The 15 SPUNC members who responded to this question are fairly evenly distributed across the ranges up to \$500 000. Three have a turnover of less than \$5000, four are in the \$20 001 to \$50 000 range, and one or two are in each of the other categories below \$500 000.

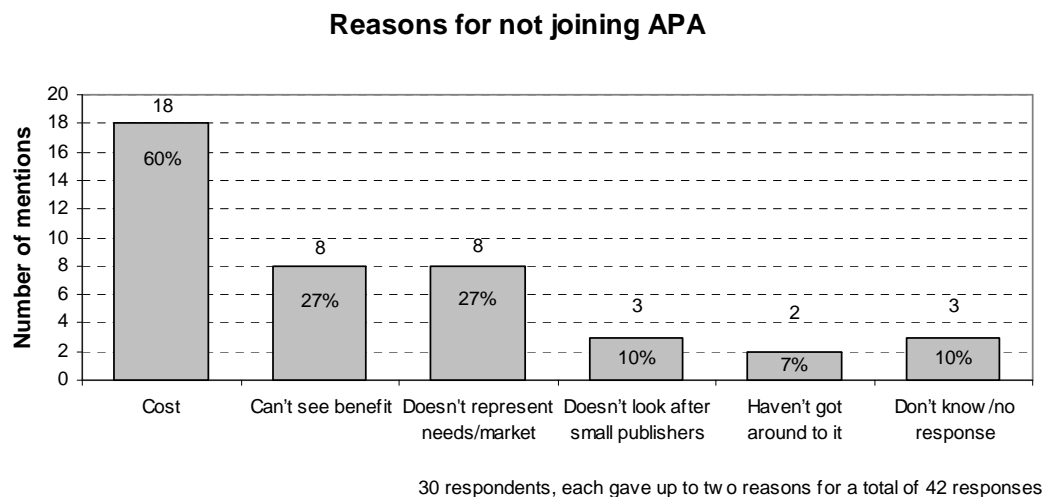
## APA membership



All 13 respondents who are members of the APA publish books (two publish both books and a journal/magazine). None of the journal/magazine publishers (who do not also publish books) are APA members. APA membership does allow for journal/magazine publishers.

One member of SPUNC is also a member of the APA (Giramondo Publishing).

Almost two thirds of the publishers surveyed are not members of the APA, usually citing cost as the reason, closely followed by a perceived lack of benefit or not feeling that the APA represents their needs. Several respondents also specifically commented that the APA doesn't look after the needs of small publishers (see graph and comments on the following page).



*"We aren't interested in joining. Our market is too different, there would be no benefits to us."*

*"We don't feel the benefits outweigh the cost."*

*"Can't afford it. Would like to be, but it's only set up for the big end of town."*

*"Too expensive! And poetry marketing is so far out on the fringe, I can't see what they could do for us that would come close to recouping the cost."*

*"Costly and because it's a big boys' club."*

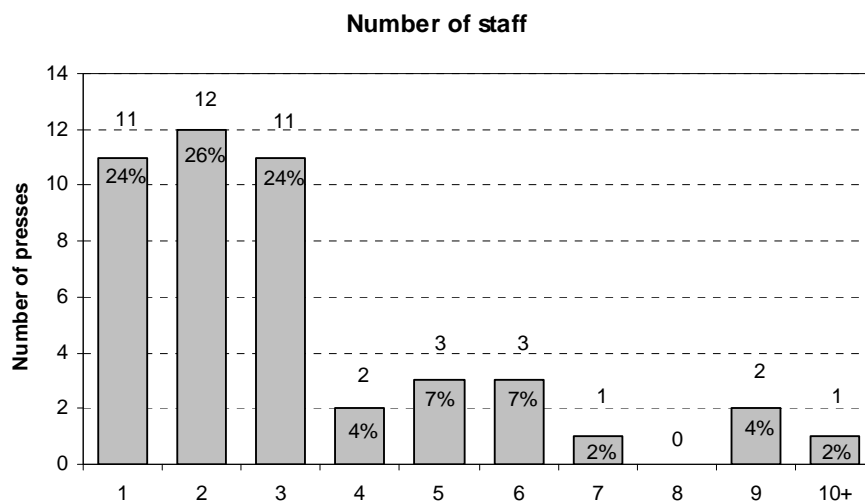
*"Being in a regional centre, I've just not bothered. Probably should be, but it costs money – that's probaly a small book."*

*"Too expensive, doesn't represent my interests."*

*"No, never got around to it. We know what we want to do, and we just go and do it."*

## Staff and freelancers

Note: because of the nature of small press publishing, where most publishers and staff work without regard to regular hours or wage schemes, collecting definite and comparable data on employment was difficult. Further research with specifically targeted questions would be necessary to make any definite conclusions about employment in small presses.



46 responses

NB: This is the total number of people who regularly work at the press, regardless of hours or pay

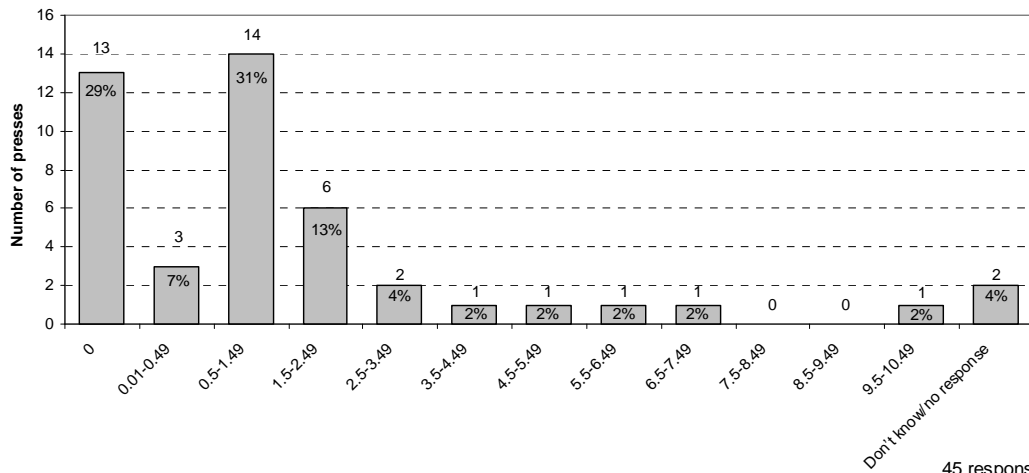
Three quarters of small presses surveyed (34 of 46) have one, two or three regular staff members.

A total of approximately 146 people regularly work in the 46 presses surveyed.

### *Staff and annual turnover*

Presses with four to seven regular staff members are not necessarily those that have high turnovers or produce many titles per year; some are co-operative efforts and have multiple publishers/editors who work for little or no pay. The three presses with nine or more staff are Wakefield, Scribe and Currency Press, who did not specify their turnover but are generally recognised to be 'large' small publishers.

### Full-time equivalent of paid staff (total)



NB: This data should be used as an indication only, as there may be some ambiguity about hours worked versus hours paid. Many publishers do not have regular hours or wages. One response was discounted because of obvious disparity.

Almost a third of presses surveyed (13 of 45) have no staff on a wage or salary scheme. Several commented that their business is break-even only, and contributors and freelancers are paid before the publisher/editor(s).

#### *Paid staff and turnover*

Eight of the 13 presses with no paid staff have an annual turnover of less than \$10 000, three have a turnover of \$10 000-\$20 000 and one has a turnover of \$20 000-\$50 000 but is break-even only. One did not specify turnover.

#### *Paid staff and SPUNC members*

SPUNC members have paid FTEs ranging from zero to 4.4.

#### *Freelancers*

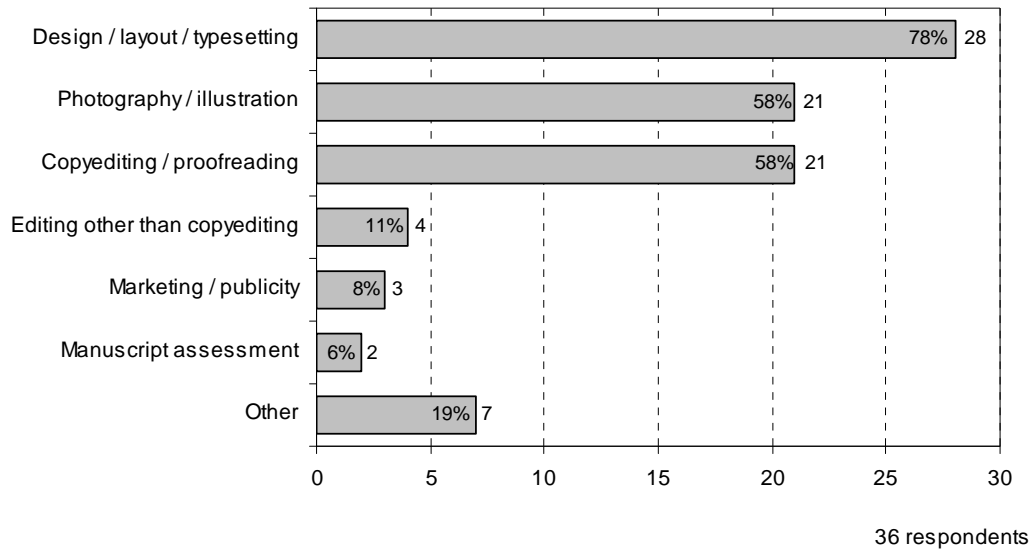
A total of approximately 166 freelancers have been used in the last 12 months by the 46 presses surveyed.

80% of presses surveyed used at least one freelancer in the last 12 months (36 of 45 responses, including one 'don't know'. One response was discounted because it included all contributors as freelancers, where other responses did not).

Most presses who used freelancers in the past 12 months (75%, 27 of 36) used between one and five freelancers, usually for design, typesetting and/or layout.

Almost half of those who did use freelancers (17 of 36) used just one or two.

### Main activities of freelancers



'Other' activities of freelancers included

- » Contracts
- » Picture rights and permissions
- » Some administrative work
- » Translation
- » Pre-press
- » Launch staff
- » "A bit of this, a bit of that"

(1 response each)

### *Freelancers and turnover*

There is no direct correlation between the number of freelancers used and annual turnover, although for obvious reasons presses with a turnover of \$5000 or less tend not to use (paid) freelancers, or to use just one or two.

### **Volunteers and training**

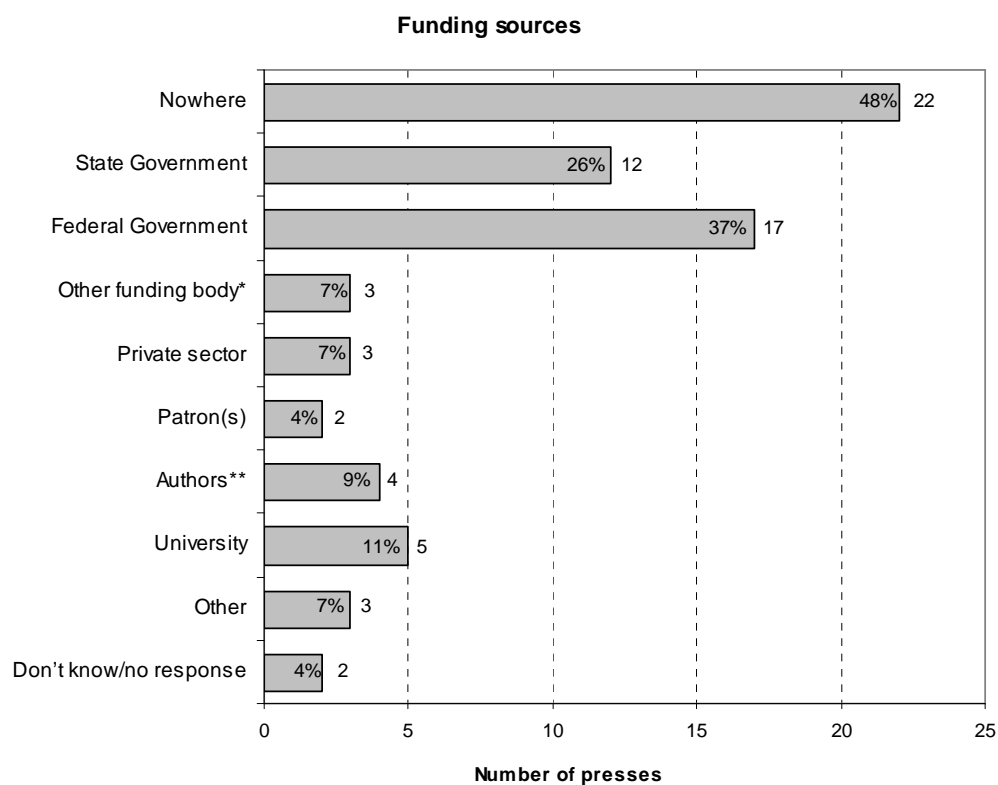
- » 89% of the publishers surveyed (41 of 46) have used unpaid staff, interns, work experience students or volunteers in the last 12 months.
- » Most presses (32 of 46) have had 1-5 volunteers or unpaid staff working for them in the last 12 months.

A total of 200 unpaid staff, interns, work experience students or volunteers worked for the 46 surveyed presses in the last year, including 50 who were involved in Express Media's Emerging Writers' Festival.

Of these, around a quarter (52) received practical industry training as part of their involvement. Including the Emerging Writers' Festival, where volunteers received training which may not have been directly related to publishing, this figure is 72.

Note: no distinction was made between formal and informal training or the length of volunteers'/interns' involvement.

## Funding



46 responses

\*All three specified CAL, one also specified the Australian Business Arts Foundation.

\*\*Two others answered "occasionally" and "rarely".

Of the 22 presses who receive no funding

- » Five have a turnover of less than \$5000 (23%)
- » Ten have a turnover of less than \$20 000 (45%)

The two presses who receive funding from a patron are journal/magazine publishers.

### *Federal government funding*

Of the 17 presses who receive funding from the federal government;:

- » Eleven are companies (65%), four are not-for-profit organisations (24%), one is attached to a university and one is a partnership
- » The most commonly published genres are short fiction and poetry (82% and 76% respectively, although note that these publishers do not necessarily publish these genres exclusively, and that short fiction and poetry are the most commonly published genres overall)
- » Eleven also receive funding from a state government

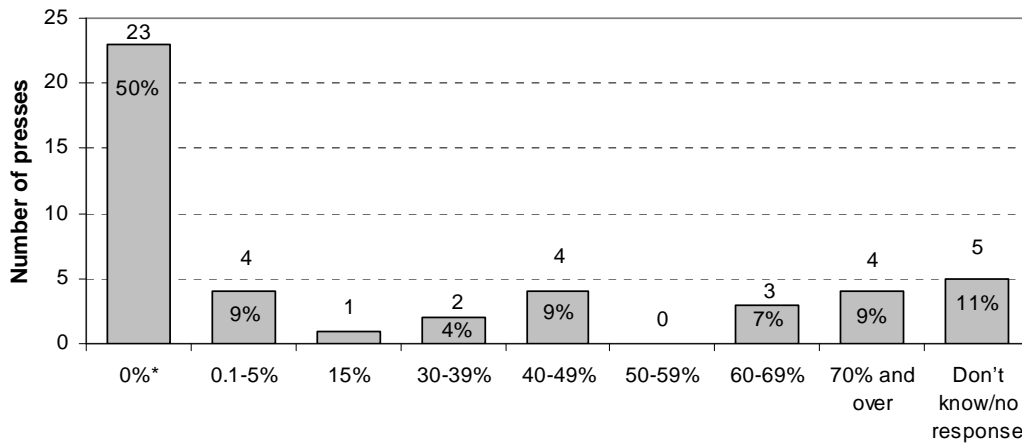
One third of book publishers surveyed and half of the journal/magazine publishers surveyed receive federal government funding (NB: there is some crossover by respondents who publish both books and a journal/magazine).

*State government funding*

Of the 12 presses who receive funding from a state government

- » Six are companies (50%), four are not-for-profit organisations (33%), one is attached to a university and one is a partnership
- » All but one also receive funding from the federal government (92%)
- » The most commonly published genres are short fiction and poetry (83% and 58% respectively, although note that these publishers do not necessarily publish these genres exclusively, and short fiction and poetry are the most commonly published genres overall)

**Funding as percentage of income**



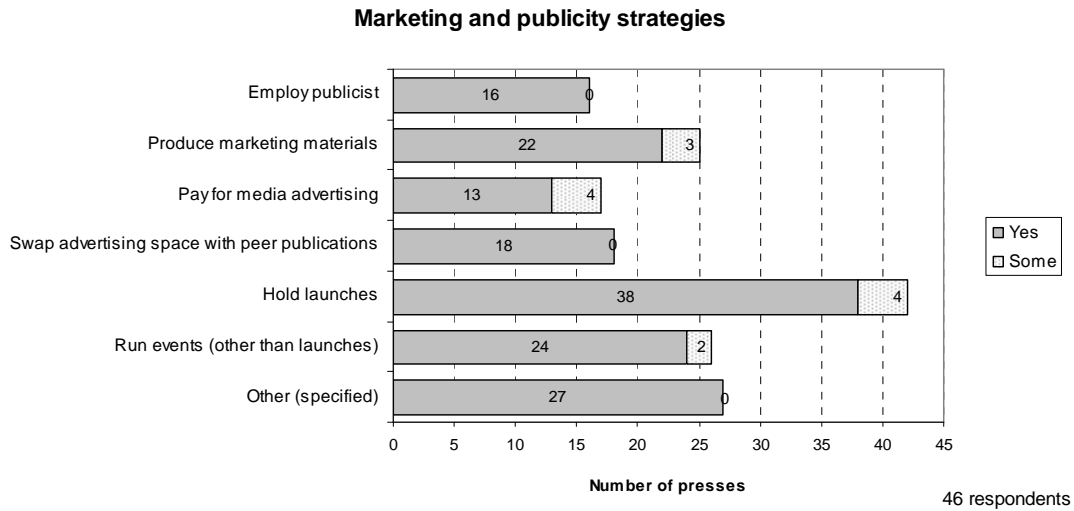
46 responses

\*Includes one response of "0.00001%"

*"I gave up applying for funding within the third year of the current government because of all the time I put in with no success."*

*"I made a policy decision to stop applying for funding. The books that have been supported have been the dogs [in terms of success]. Maybe it's because I go in half-arsed when they're funded, because they've already made their money, whereas if they're starting from scratch and need to make the money back, I put more energy into it. It's also tied to an ideological kind of commitment."*

## Marketing and publicity



Of the 46 respondents, 16 (35%) use just one or two of the specified marketing/publicity strategies, 20 (44%) used three or four, while eight (17%) used five or all six (not including 'other').

Two respondents said they don't use any of the publicity strategies mentioned. One of them, with a turnover of under \$5000, said they rely on word of mouth while the other, with a turnover of between \$100 000 and \$500 000, said they rely on word of mouth and the marketing their distributor does.

### *Publicity and annual turnover*

Most of the presses who employ a publicist have an annual turnover greater than \$50 000 (10 of the 12 who specified turnover).

### *Online publicity*

Almost a third of respondents (14 of 46) specifically mentioned their online publicity and marketing strategies, without being prompted. Online tactics include:

- » Email newsletters
- » Sending out marketing packages or announcements via email, and
- » Viral campaigns

Interactive Publications and SminkWorks Books are particularly resourceful in their online marketing; between them they also mentioned:

- » Swapping links
- » Participating in or hosting forums
- » Writing a blog
- » Search engine optimisation
- » Free e-books or digital samples delivered by e-book distributors
- » A podcast series of conversations with authors

*"I think it's also difficult to be a small voice as far as publicity goes – people buy books they have heard of, read about or been told about. (That's why I think it's a good idea to join a collective of small presses, such as SPUNC, where there can be combined publicity clout.) That being said, I think small presses have a unique opportunity to take advantage of:*

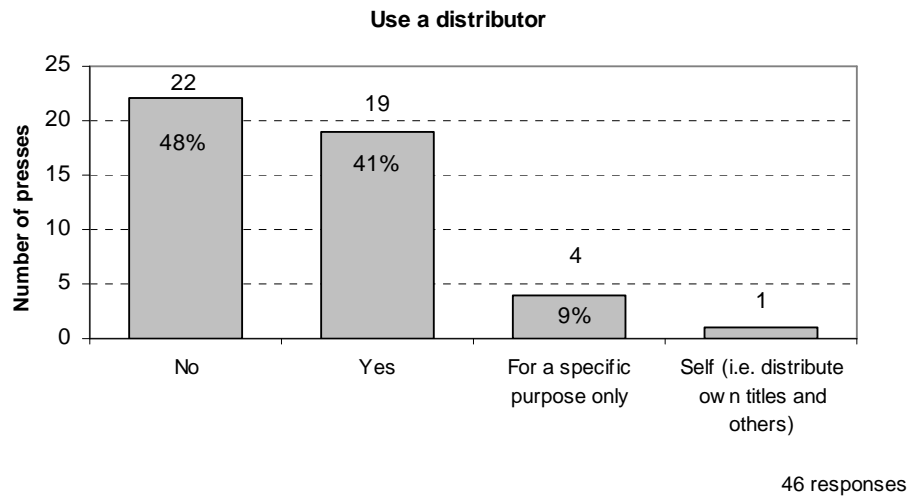
- a. The Internet, where minority markets are larger, and*
- b. The long-tail-of-content phenomenon – where businesses with distribution power (possible with the Internet) can sell a greater volume of otherwise hard to find items at small volumes than of popular items at large volumes."*

#### *Other tactics*

Respondents also mentioned:

- » Giving lectures, workshops and tutorials
- » Publishers appearing at events organised by others and going to conferences
- » Targeting local or specialist media
- » Direct marketing, particularly to organisations where a particular title might be relevant (and offering discounts for bulk purchases)
- » Authors giving readings, appearances and on-selling their titles
- » Running competitions
- » Word of mouth
- » Sponsoring competitions (i.e. donating prizes)
- » Sending complimentary copies to media
- » Hosting a festival (the Emerging Writers' Festival, by Express Media)

## Distribution



Of the respondents who do use a distributor, two are journal publishers, two publish both books and journals, and 15 publish books only. All have an average print run of 1000 or more, and the majority (15 of 19) have an average print run of 2000 or more.

The four presses who only use a distributor for a specific purpose, are:

- » The Australian Book Review, who use Selectair to distribute to Borders stores;
- » Is Not Magazine, who use Rock Posters for their street displays;
- » Gestalt Comics, who use Diamond Comic Distribution for specialist international distribution; and
- » Agog! Press, who use Amazon Print on Demand for PoD and international distribution.

Wakefield press distributes its own titles as well as those of other publishers.

### *Distribution and annual turnover*

Five of the presses who use a distributor have an annual turnover of less than \$50 000, nine have a turnover above \$50 000 and five did not specify.

### *Distribution and journals/magazines*

Only six of the 17 journal/magazine publishers use a distributor. Three of the six who use a distributor specified that the distribution service they use is only for certain areas of their distribution (i.e. bookstores but not newsagents, a particular chain but not other bookstores, a poster distributor for Is Not Magazine's wall display issues).

### *Distribution and SPUNC members*

Six of the 19 surveyed SPUNC members use a distributor.

*Distribution companies used*

Of the 19 presses surveyed who use a distributor (not including companies used for limited/specific distribution listed above), the companies used are:

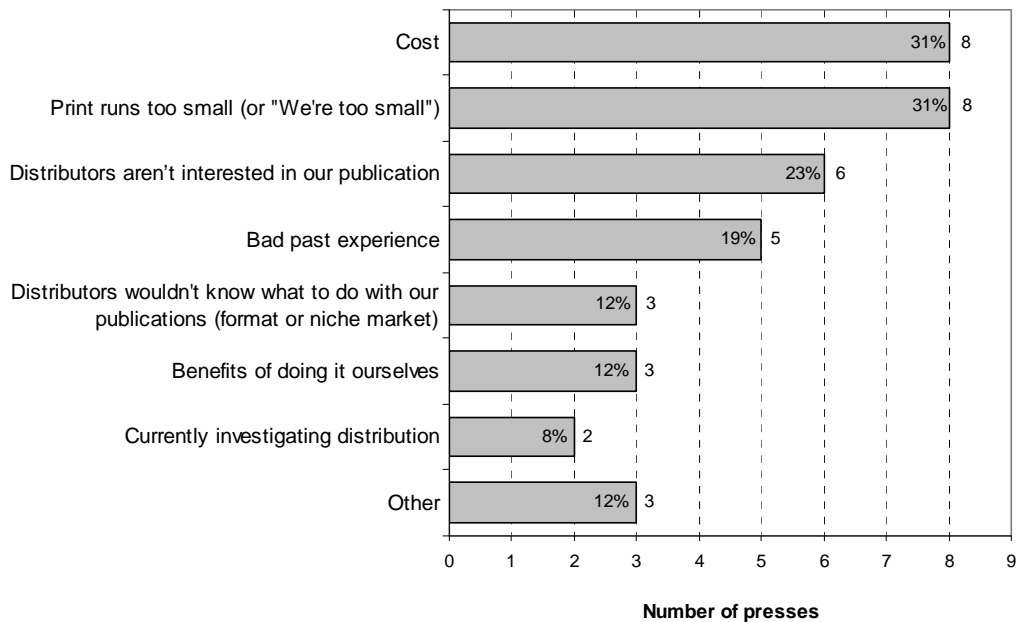
Dennis Jones (3)	Allen & Unwin (1*)	Simon and Schuster (1)
Tower Books (3)	Baramo (1)	UNIREPS (1)
Macmillan (2)	Hardie Grant (1)	Wakefield Press (1**)
Penguin (2)	HarperCollins (1)	
BookWise (1)	The Australian Book Group (1)	

\* through a partnership with ABC books  
 \*\* not including Wakefield itself

*Reasons for not using a distributor*

The 26 presses who do not use a distributor (including those who use a distributor for a specific purpose, but not for general distribution) generally felt that the cost was too high or had trouble finding a distributor because of their size. Ten have tried to use a distributor but currently do not, either because they are unable to come to a mutually acceptable arrangement or because they have decided to handle distribution themselves (or both).

**Reasons for not using a distributor**



26 respondents gave up to two reasons each, for a total of 38 responses

The respondents who said they don't use a distributor because of cost tended to have an annual turnover of under \$20 000 (five of eight).

Of the eight respondents who said their print runs are too small or “we’re too small”, five have an average print run of 250-500, two have an average print run of 1000, and one of 1500.

Of those who said distributors aren’t interested in their publication, two are journal publishers and the remaining four are publishers of comics and graphic novels, speculative fiction, songbooks and poetry chapbooks.

The ‘other’ comments included one respondent who was unsure about how to get a distributor, and a press which is attached to a university and uses students for distribution to give them practical experience.

*"They charge too much, and we have our own ways of marketing the books. Have investigated distributors, but we're pretty small, and it's like losing almost another 40%. We don't go round to major stores, we have a good relationship with a few bookstores. Getting information around, at not too much of a cost, is a challenge. It's not worth our while going to a bookshop with just one copy."*

*"Not yet, currently being looked at but believe the cost is too high at this stage."*

*"Tried one, it was disastrous – because we only distribute small numbers to each store, the distributor didn't pay much attention to us, sent copies back that were unsaleable, all bashed up."*

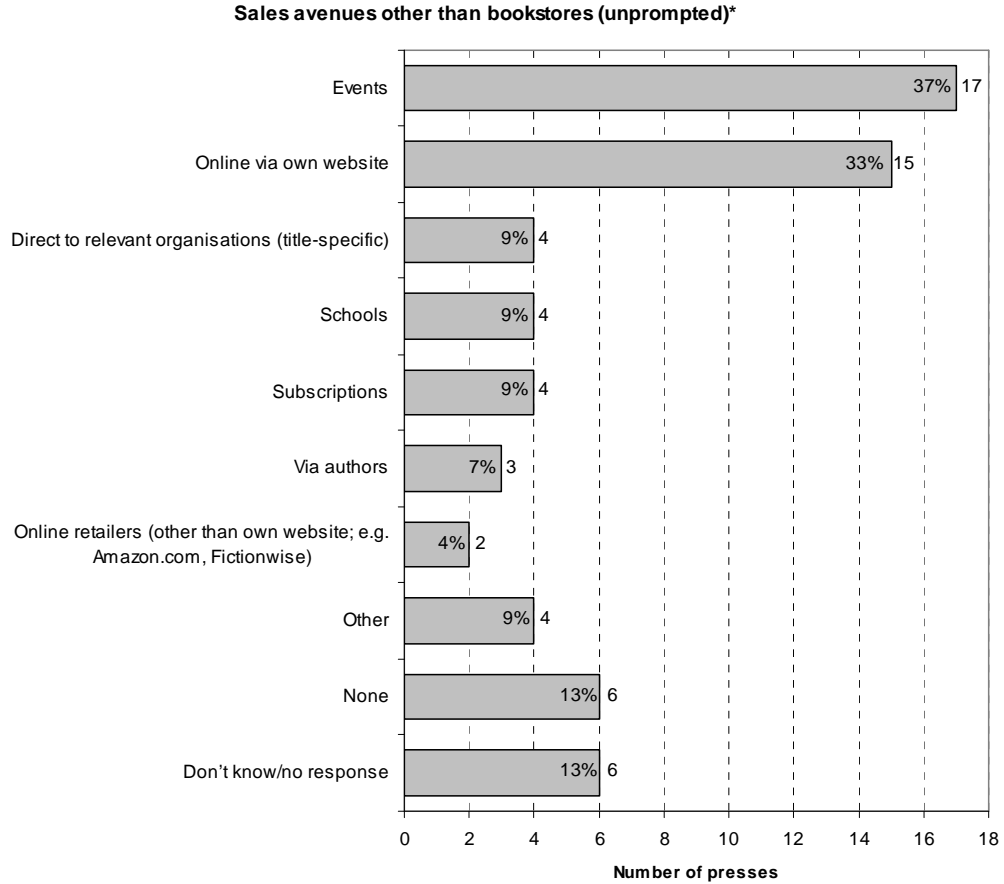
*"Tried one who ended up owing me a large amount of money which had to be retrieved via a debt collection agency."*

*"Haven't tried. Not sure that they would understand my niche market sector."*

*"We used to have a distributor but once having established our market that way we found it was more efficient to distribute directly (we eliminated sale or return contracts with bookshops except for Readings)."*

*"Distributors aren't interested in selling poetry. Besides, they want 20% minimum of the RRP. We're centred on mail order, and our margins are much healthier that way. Because we use print-on-demand, we're much keener on firm sales than SOR."*

## Sales avenues other than bookstores



46 respondents  
Excluding 'Don't know/no response' and 'nothing' categories, 27 respondents each gave up to 3 responses for a total of 53 responses.

\*These numbers come from unprompted responses. Other presses may use these sales avenues but did not specifically mention them.

'Other' responses were:

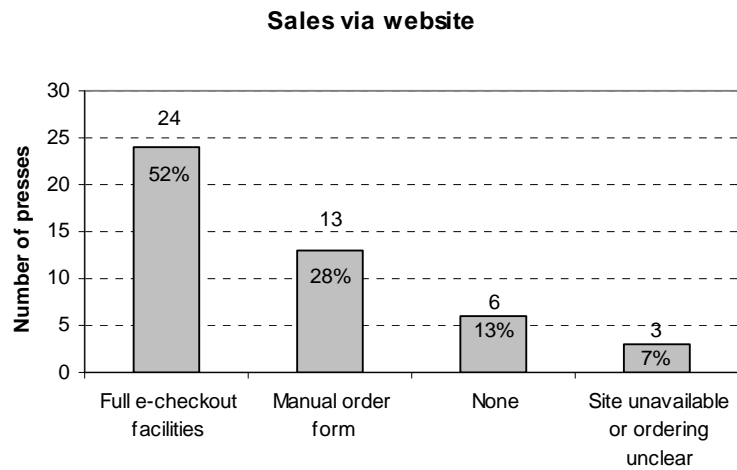
- » Through a distributor of food products (for food-related titles)
- » Bookclubs
- » Exports
- » Through a university

(1 response each)

*"Small press needs really innovative selling practices. Get books out cheaply at launches and move stock, even if you're not making much profit. Keep distributors out and booksellers out, to a degree, so they're not taking out their percentages, we need a new model of bookselling."*

### Online sales

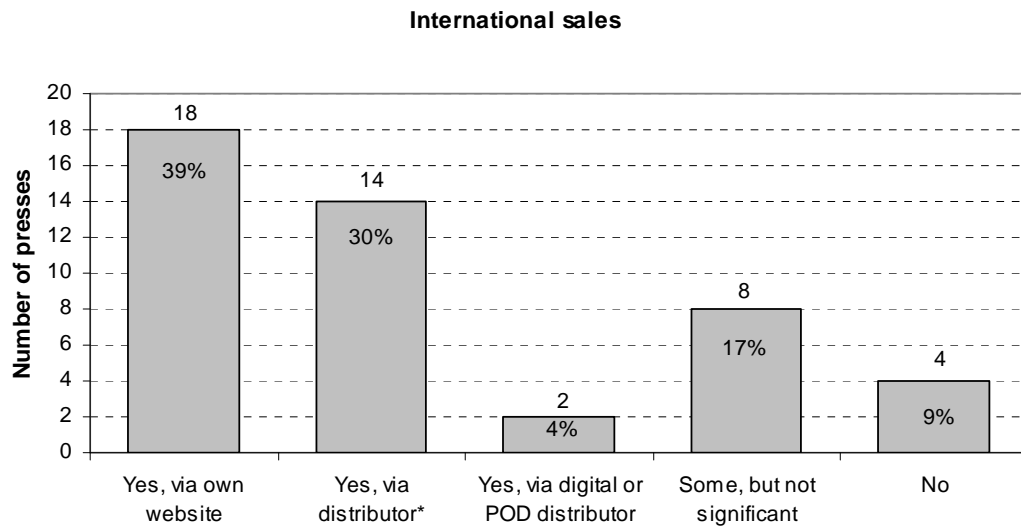
Although only a third of respondents (15 of 46) specifically mentioned their website as one of their sales avenues, a visit to respondents' sites showed that 80% have the means to order from the site, whether by a manual (email or print) order form or through full e-checkout facilities.



Visited all 46 survey respondents' websites

Most sites where online ordering was not available directed potential buyers to a distributor or bricks-and-mortar stockists.

## International sales

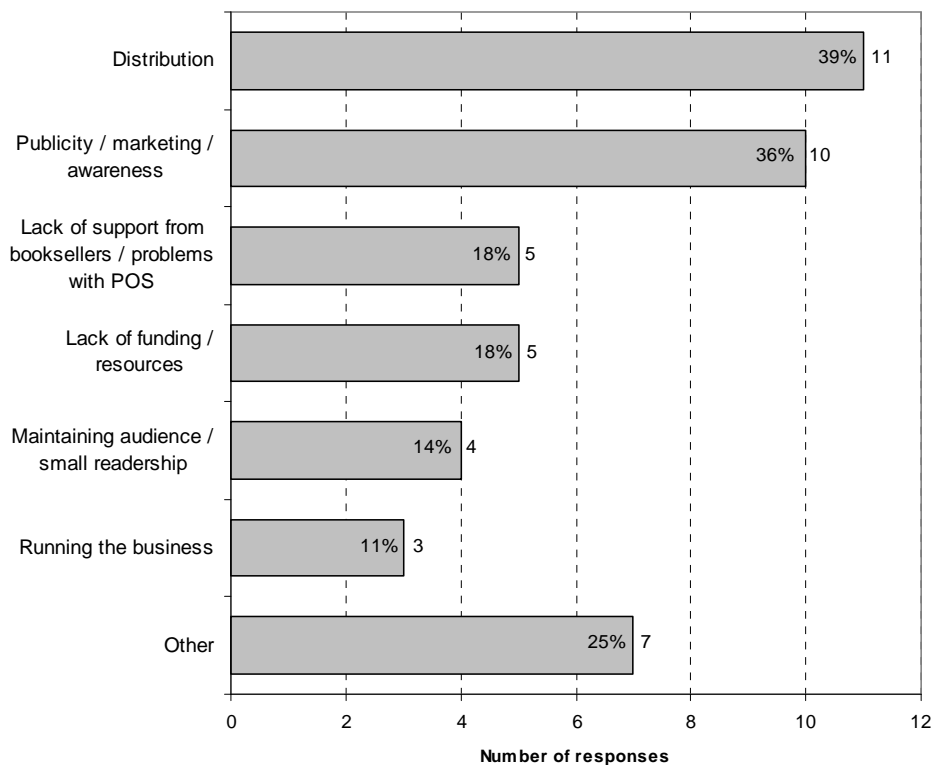


46 respondents

\*Four publishers who have international distributors also mentioned some direct international sales.  
Three respondents who have international distributors also mentioned international rights sales.

## Major difficulties for small and independent presses

Main difficulties for small and independent publishers  
(unprompted)



28 respondents

Each gave up to 3 responses for a total of 45 responses

NB: This was a supplementary follow-up question, and not all survey participants were asked to comment.

'Other' difficulties mentioned were:

- » People power
- » Personal strain
- » Storage
- » Finding advertisers
- » Negative perceptions of small presses
- » Taking risks
- » Bureaucratic demands of funding

(1 response each)

Example comments about the main difficulties for small and independent presses:

*"Multi-tasking is, and always will be, a major problem. Whereas large publishers can afford to employ specialists for various departments, a sole trader has to have some knowledge of a great many subjects. These include marketing, publicity, contracts, accounts, editing, proofreading, distribution, covers (layout etc)."*

*"Lack of support from booksellers, in particular Borders, airport stores and some independents. Media that isn't always receptive to new voices. Almost no one will stock poetry, except for the usual suspects."*

*"The main difficulties are remaining sustainable as a business and facing all the admin, marketing, distro etc duties whilst still being focused on the core creative endeavour."*

*"Dwindling literary readership that doesn't appear to be regenerating in younger people."*

*"Inability to sell books through lack of marketing clout (it's not my forte, I must admit). But I can't afford a publicist or advertising."*

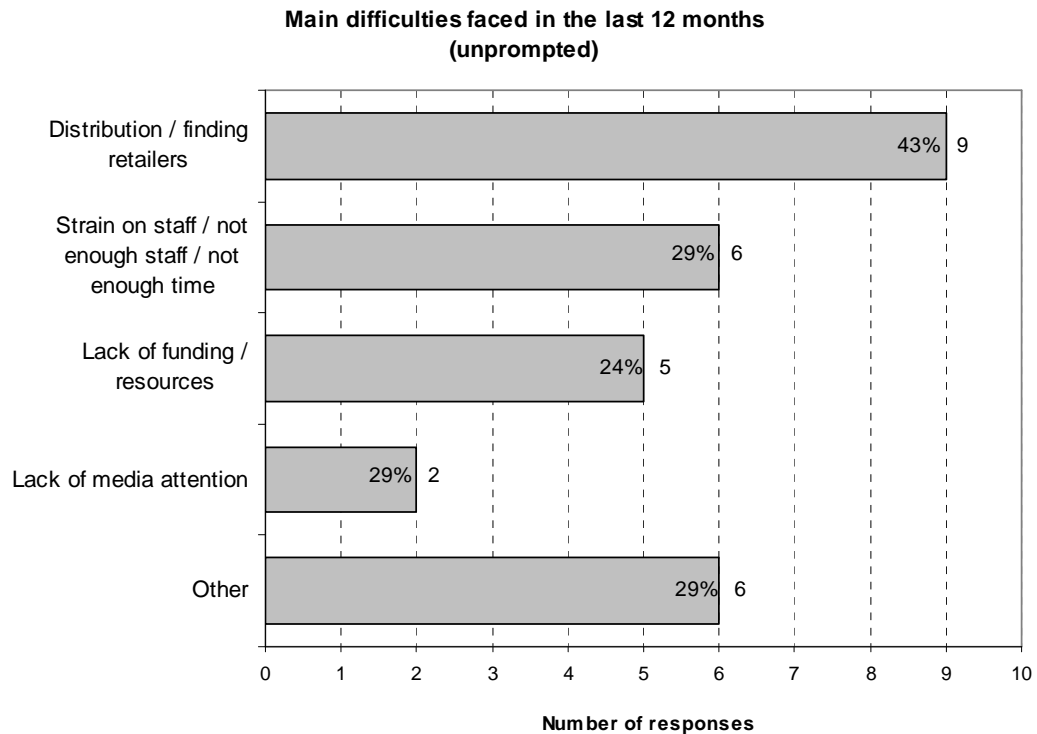
*"The perception, underpinned by the industry structure, that small publishing is necessarily of an inferior quality to corporate publishing."*

*"Distribution and person-power."*

*"Advertising, awareness. We're all working with no money, for the love of it. It's been a labour of love from the beginning – but that can be a problem because when the love dies, the project dies. 10 years is the maximum anyone lasts doing this."*

*"Resources – lack of. The rapidly declining government support. All of which makes it difficult to distribute, which makes it difficult to attract advertisers (by increasing circulation), which makes it diff to get distribution – it's a catch-22."*

## Difficulties faced in the last 12 months



21 respondents

Each gave up to 2 responses for a total of 28 responses.

NB: This was a supplementary follow-up question, and not all survey participants were asked to comment.

When asked about the most significant difficulty they had faced in the last 12 months, more publishers commented on distribution and finding retailers than anything else.

Other difficulties respondents have recently experienced include:

- » Managerial incompetence
- » Authors snaffled by larger publishers (who can pay advances) for their next book
- » The state of the industry
- » Sales slump
- » Lack of infrastructure
- » Bureaucratic demands of funding

Comments about recent difficulties

*"Our major recent difficulty has been the Australia Council's edict which compelled us to become a Pty Ltd Company, a requirement that consumes time, money and energy in unnecessary administration, rather than production."*

*"Having a third of our AusCo funding cut, due to a variety of reasons. We also suffer from the turnover of staff – well, not really, they don't run away that quickly, but it does happen. We've hired a new general manager and a new artistic director this year, and there's disruption when there's not regular staff in, which comes from being under-resourced and all of us having position descriptions that cover more than we could ever hope to cope with. We get tired and burnt out. We attract passionate and dedicated and experienced people, but it's not the sort of job you'd hang around in for 10 years, which means continuity in the organisation tends to suffer a bit – but it also brings in fresh ideas."*

*"Having enough money to pay our writers. Finding stockists in Sydney – it's hard to find independent bookstores."*

*"Not having enough cash."*

*"Finding retailers who are interested in servicing niche audiences."*

*"Lack of notice from city's newspaper."*

*"Slow payment from distributor (who does not get paid by the bookshops)."*

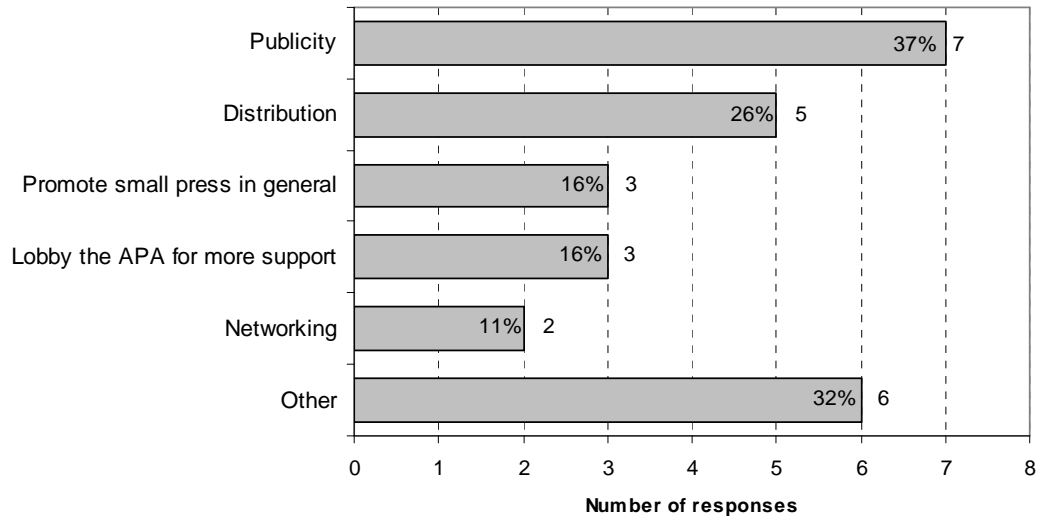
*"Time, without a doubt. Not enough of the stuff."*

*"Lack of qualified staff/support stretching thin the extant editorial body."*

*"Trying to get people to volunteer, it's too much to do on my own. People only want to help with the good stuff, like selecting stories; they don't want to help with the other stuff like getting it into bookstores or helping with publicity. But it's also the workload, asking that of people is hard."*

## What SPUNC can do to help

### How an industry representative body could help



19 respondents

Each gave up to 3 responses for a total of 26 responses.

NB: This was a supplementary follow-up question, and not all survey participants were asked to comment.

Other comments about how an industry representative body could help included:

- » Establishing direct communication between readers and publishers
- » Professional development courses in marketing and publicity strategies
- » Informing independent retailers about independent publishers
- » Create a high-profile sales website
- » Find advertisers who are interested in/sympathetic to small presses
- » Provide information on funding opportunities

*"Use SPUNC to set up a sustainable network for small press publishers that outsources all the fiddly stocking, distro, follow-up type stuff. A subsidised, open-source back end for small press publishers to use the services of to get their stuff out there without having to be overwhelmed by those duties themselves..."*

*"Organise distribution deals; promote the sector."*

*"Anyone who manages to crack the distribution problem would have so many people jumping on board. Anyone who's willing and able and has a good idea will have 50 presses running to them, with products."*

*"Public awareness for the sector."*

*"Joint marketing outlets, e.g. via internet, media publicity, perhaps even a small publisher's book fair? A way of getting books listed on electronic databases such as TitlePage. Getting the APA to recognise how small we are, and make a membership category/fee structure to suit."*

*"Marketing and publicity strategies and how to go about it; professional development courses in that area. Help with distribution."*

*"I think it's about investigating how we can work collectively, setting up channels of communications between readers and publishers that don't involve corporate bookshops."*

*"Perhaps generate interest in our high-quality publication, and therefore enable networking, distribution and sales."*

*"Shared advertising, publicity initiatives, lobby for reduced APA and TitlePage rates for small publishers."*

*"The one area that could be improved is publicity, maybe having some co-operative where things could be electronically circulated to a wider audience."*

*"Assist with informing independent retailers as to who we are and what we do. Provide information on funding opportunities (at the federal level)."*

*"Sourcing advertisers who are sympathetic to (and interested in) small presses, direct them to the publication that's most appropriate. Networking – it's really encouraging to meet people doing great things, and to talk about it."*

*"I want the arts department to put an ad in the West Australian every month – not a review, but a couple of inches of column and maybe a cover picture, just an announcement: 'these are West Australian books, by West Australians, this is what's happening'. The Arts Department should be promoting WA literature of all different types."*

*"A voice within the APA might help."*

*"Cultivation of the culture and the value of small press and small publishers. With all the consolidation and the generic globalisation of literature and writing in general, there's a lot less diversity. Need to promote an awareness that there is a vital role for small presses, and a need for them to remain viable – they should be supported and celebrated."*

## Comments

This is a list of other comments made by respondents, which may not relate to a particular topic but are included to give the survey data context and to help gauge the mood of the sector.

*"We need five Giramondos, groups like Sleepers to publish high quality fiction. People who judge fiction awards tell me there are about 20 books of quality being published in Australia each year, compared with about 80 that are submitted. You just have to look at novels being reviewed in ABR – only about six per issue; there should be more. [Literary] fiction that would have been published 10 years ago is not being published."*

*"We don't see ourselves as having a 'role'. We see ourselves as having a market – and the moment we're not serving that market, we won't exist anymore. We're not about forcing content onto anyone, but we are about proving that there's space and demand for certain types of writing that aren't published elsewhere. In general we believe that small press is flexible and has the opportunity to present new or under-represented kinds of writing to audiences. However, we back that up with an understanding of branding, the power of good design and the importance of markets beyond Australia."*

*"[A major difficulty for me is] Realising that I don't want to devote the time and energy to it any more, because I'd rather be writing. Realising that I'm just not a business person at heart. I already knew that - but realised it's a problem, got to the point where I need to treat it like a business to keep it going. I used to be better, but have lost hope that it'll get better."*

*"I'm in talks at the moment with a guy, and he's starting to convince me that the only way I can possibly operate is by providing a packaging service to people who want to publish their own stuff, and take a cut of it. I think we'll see more of that."*

*"Without having any business or marketing background, I came to it without knowing any of the issues. We set it up very quickly, but if we'd looked at all the ins and outs and bits and bobs we never would have done it! Now that I'm feeling more comfortable, I'm looking at those more professional aspects."*

*"Would use more freelance services if they were available: e.g. in exporting, direct marketing, etc."*

*"Hard work sustaining the effort after 20 years – need for succession planning..."*

*"We're constantly having to justify the decision to be in print, not just online. Everything online is just so disposable, it's hard to differentiate it in your mind. We like the fetishness of having something to carry around."*

*"Australia is well behind the US and the rest of the world in getting digital publishing happening. Independent publishing is very difficult, but it can also be tremendously rewarding. It makes little economic sense for the major publishing houses to be involved with poetry and short fiction because the sales figures seldom justify their normal print run and they hardly ever promote these titles. Small and niche publishers have much more potential to be successful there. Small publishers are where innovation in the industry happens because they can more quickly adapt to changing market conditions, whereas major publishers [in Australia] that are branches of multinational companies have less flexibility in making changes in their mode of operation. Niche and small publishers can take advantage by moving forward with innovations and new technology."*

*"Representative bodies are really important, being part of training and networking opportunities is crucial, small publishers need to be seen and heard."*

*"It's hard but intensely rewarding."*

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## Resources

### Links

The Australian Book Group (Distributor)

<http://www.australianbookgroup.com.au/>

The Independent Northern Publishers Group (North East England)

<http://www.northernpublishers.co.uk>

<http://www.literaturenortheast.co.uk>

Index (North West England)

<http://www.publishingnorthwest.co.uk>

<http://www.literaturenorthwest.co.uk>

Thirst (Yorkshire, England)

<http://www.thirstbooks.com>

The New York Centre for Independent Publishing (US)

<http://www.nycip.org>

The Independent Publishers Guild (UK)

<http://www.ipg.uk.com/>

PMA, the Independent Book Publishers' Association (US)

<http://www.pma-online.org>

SPAWN: Small Publishers, Artists and Writers' Network (US)

<http://www.spawn.org>

SPAN: Small Publishers Association of North America (US)

<http://www.spannet.org>

Laughing Bear Press and The Surviving Small Press (practical advice for small publishers)

<http://www.laughingbear.com>

### Research papers

Tranter S (2004) *Independent Publishing in the North West*, Arts Council England, North West, available online at

[http://www.artscouncil.org.uk/publications/publication\\_detail.php?sid=11&id=466](http://www.artscouncil.org.uk/publications/publication_detail.php?sid=11&id=466)

Hampson J and P Richardson (2005) *Kitchen Table to Laptop: Independent Publishing in England*, Arts Council England, available online at

[http://www.artscouncil.org.uk/publications/publication\\_detail.php?sid=11&id=430](http://www.artscouncil.org.uk/publications/publication_detail.php?sid=11&id=430)

## Articles

### *Small publishing – general information and discussion*

Brandl & Schlesinger (no date) 'Small Literary Publishing', available online at <http://www.publishers.asn.au/emplibary/Writers.Poets.pdf>

Jeff Byles (2003) 'The Tao of Small: 70,000-Odd Small Publishers Might Be Wagging the Publishing Dog', available online through PMA (The Independent Book Publishers Association) at <http://www.pma-online.org/articles/shownews.aspx?id=1928>

'The Future of Independent publishing' panel hosted by The Society of Authors (London, no date), notes available online at [http://www.societyofauthors.org/information\\_and\\_news/society\\_reports\\_archive/the\\_future/](http://www.societyofauthors.org/information_and_news/society_reports_archive/the_future/)

### *Small publishing and the media*

Bruce L. Bortz (2000) 'Book Publishing's "Iron Triangle": Recognizing How the Media Downplays Books from Small Publishers', available online through PMA (The Independent Book Publishers Association) at <http://www.pma-online.org/articles/shownews.aspx?id=1365>

### *Alternative publishing (publishing with focus on social responsibility and creative expression)*

Chris Atton (1999) 'A reassessment of the alternative press', *Media, culture and society*, 21(5), pp51-76

### *Defining 'small press'*

Tom Person (2003) 'The Surviving Small Press: What Is Small Press?', *Laughing Bear Newsletter #137*, Laughing Bear Press, available online at [http://www.laughingbear.com/lbn.asp?mode=article&subMode=137\\_what\\_is\\_small\\_press](http://www.laughingbear.com/lbn.asp?mode=article&subMode=137_what_is_small_press)

## Other resources used in this research

Transcript of the Independent Press Conference 2007 at the Emerging Writers' Festival, 24-25 May 2007, Melbourne

BookScan data presented by Rose Michael (one behalf of Michael Webster) at the Newcastle Young Writers' Festival 2007

Phone interview with Catharine Retter, publisher at Citrus Press and chairperson of The Australian Book Group, 20 October 2007

**A note about other data sources**

After discussing with Michael Webster (of BookScan Australia) the possibility of garnering information about independent publishers from BookScan data, the consensus was that, due to the scale on which BookScan operates and the bookstores from which it collects data, together with the problem of defining 'small press' and sector's reliance on sales avenues other than major bookselling chains, the data would not be particularly relevant or indicative of small publishers' place in the market.

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## Acknowledgements

Thanks to all the publishers who took the time out of their hectic publishing schedules to be part of this research, and to the SPUNC working group for their invaluable support.

Thanks to Rose Michael at the University of Melbourne, and Louise Swinn and Zoe Dattner at Sleepers Publishing for their advice and direction.

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## About the author

Kate Freeth is studying for a Master of Arts in Publishing and Communications at the University of Melbourne (due to be completed in 2008), and was an intern at Sleepers Publishing for most of 2007.

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## Appendix: survey questionnaire

### **SPUNC Survey of Small and Independent Presses October 2007**

Thanks for taking the time to be part of this research. This survey aims to identify small and independent presses and publishers across Australia and to find out what you're doing. I'm a Masters student in the Melbourne University Publishing and Communications program, conducting this survey on behalf of SPUNC (the Small Press Underground Networking Community).

In May this year, SPUNC was formed to advance the interests of the Australian small and independent publishing sector, and to facilitate cooperation between members of that sector. For more information on SPUNC, and how to become a member, visit <http://www.spunc.com.au>.

This survey will help SPUNC identify the issues facing small publishers and bolster their efforts to gain support and recognition from government institutions, the public and the wider industry, as well as encouraging networking within the sector by identifying the many and varied presses in Australia and their activities.

Your press's information will only be available to the SPUNC committee, but general statistics may be used by SPUNC to represent the sector and gain support, for example in submissions to funding bodies (like The Australia Council) and the government, or in media releases. If you have any questions or comments about this research, or would like to see a Plain Language Statement, please email Kate Freeth ([kate.freeth@gmail.com](mailto:kate.freeth@gmail.com)).

If you think this survey doesn't apply to you or you would prefer not to participate, please send a quick reply telling me why – this will help SPUNC get a better idea of the sector's boundaries.

Thanks for your time. We know you're busy, but your answers are greatly appreciated and will help SPUNC support and develop the small and independent publishing sector.

To complete the survey, you can:

- » Type your answers directly into this document, save it and attach it to an email to [kate.freeth@gmail.com](mailto:kate.freeth@gmail.com), or
- » Email me at [kate.freeth@gmail.com](mailto:kate.freeth@gmail.com) to arrange a time to complete the survey by phone.

Answer in as much detail as you like, and feel free to include comments or extra information you think is relevant. If a question isn't relevant to you, please briefly explain why.

## 1. Publishing

What do you publish? (An overview, in your own words)

Do you publish... (Y or N for each one)

Fiction (other than short fiction)

Short fiction

Poetry

Trade non-fiction

Essays

Children's books

Artwork/photography/illustration

Educational/academic material

Something else? (Please specify)

When was your press established?

[FOR BOOK PUBLISHERS]

How many book titles do you have in print? (If you don't know exactly, give an estimate or range)

How many book titles did you publish in the last 12 months?

What is your average first print run?

[FOR JOURNAL/MAGAZINE PUBLISHERS]

How many issues have you produced (in print)?

How many issues do you produce a year (in print)?

What is your average print run?

Are you a member of the APA? If not, why?

If you are a member of the APA, are your titles included in TitlePage? If not, why?

## 2. Staff and freelancers

How many staff work at your press?

(i.e. the total number of people who regularly work there, including you/the owner/the director.)

What is the full-time equivalent of all paid staff?

(based on a 40-hour week, e.g. 1 full-time staff member and two part-time staff who each work 20 hours = 2 full-time staff)

How many freelancers have you used in the past 12 months?

What do you use freelancers for? (Y or N for each one)

- Copyediting
- Design and layout
- Photography/Illustration
- Something else? (Please specify)

### **3. Unpaid staff, volunteers and training**

Many people in the publishing industry acknowledge that small presses provide an invaluable training experience for people starting out in the industry. To prove this service that small presses provide, SPUNC would like to find out the extent to which it happens.

How many unpaid staff, volunteers, work experience students or interns worked for you in the past 12 months?  
(i.e. the total number of people who do not draw a wage, including the press's owner/director if applicable)

How many of these volunteers/students/interns/unpaid staff are receiving practical industry training (formal or informal) as part of their work?

### **4. Funding and turnover**

These questions are optional, but will help SPUNC gain a better understanding of the sector. Your individual answers will be strictly confidential, and will be available only to the SPUNC committee.

What is your annual turnover? (Enter a Y next to the applicable range)

- Under \$5 000
- \$5 001 - \$10 000
- \$10 001 - \$20 000
- \$20 001 - \$50 000
- \$50 001 - \$100 000
- \$100 001 - \$500 000
- \$500 000 - \$1 million
- Over \$1 million

In the last 12 months, have you received funding from: (Y or N for each one)

- The state government
- The federal government
- Other funding bodies (e.g. CAL's Cultural Fund) (please specify)
- The private sector
- A patron
- Your authors (contributions or a fee for services)
- Somewhere else? (Please specify)

Approximately what percentage of your income is funding?

Is your press a non-profit organisation, sole trader, partnership or company (or something else)?

## **5. Publicity and marketing**

Do you use any of the following publicity and marketing strategies?  
(Y or N for each one)

- Employ a publicist
- Produce marketing materials for sales reps
- Pay for media advertising
- Swap advertising space with peer publications
- Hold launches
- Run other events
- Something else? (Please specify)

## **6. Distribution and sales**

Do you use a distributor?

If you do use a distributor, who is it?

If you don't use a distributor, why is that? Have you tried to?

Do you use any non-standard sales avenues (for example through schools, events, etc)? If so, what are they?

Do you sell internationally? Is it through a distributor?

## **7. Differentiation**

What's your point of difference from other publishers? Is there anything you do that's particularly unusual ( e.g. events, or the format, style or subject of your publication/s)?

## **8. Other comments**

Do you have any other comments about the role of small and independent publishers?

## **Thank you**

Thanks again for your time.

If you have any questions or comments about this research, or would like to hear about the research's results, please contact Kate Freeth at [kate.freeth@gmail.com](mailto:kate.freeth@gmail.com) or on (03) 9421 0867.

For more information on SPUNC and how to become a member, go to <http://www.spunc.com.au>.

### **Follow-up questions**

Twenty-eight presses were also asked:

- » What are the main difficulties facing small and independent presses?
- » What has been the most difficult issue you've faced in the last 12 months?
- » What kind of things could a representative or industry body do to help you?