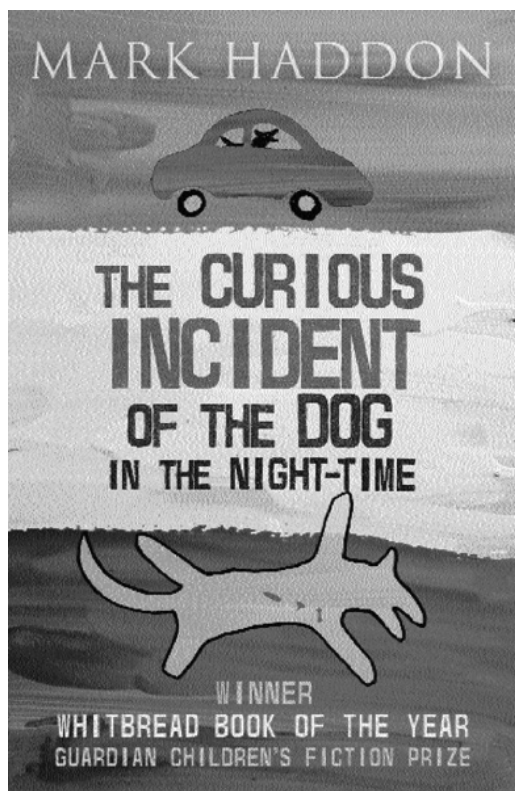
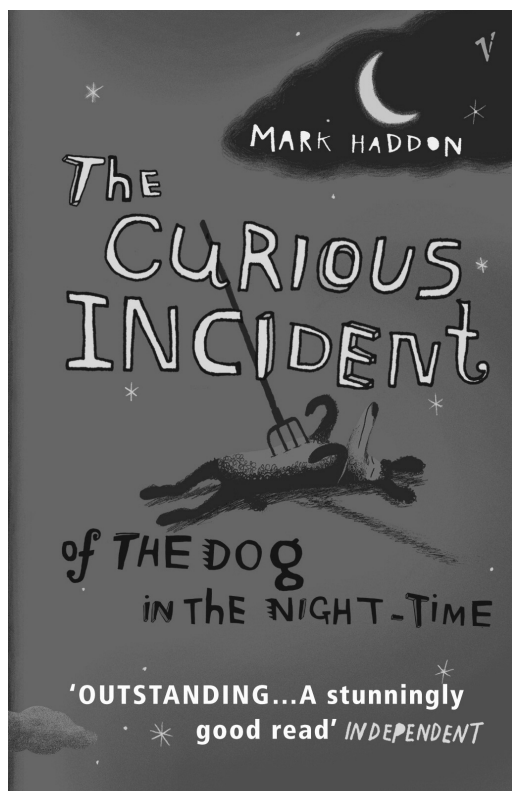


Inside Book Publishing

Giles Clark and Angus Phillips

Fourth edition



Mark Haddon's *The Curious Incident of the Dog in the Night-Time* was published in separate editions for adults (*left*) and children (*right*)

yet the publishers continued to increase their title output through to 1995 when it stabilized at around 8,000 titles. The UK market for children's books declined from 1990 through to 1997, as other new products competed for children's attention and parents' spending. However, in 1998–9 the market staged a substantial recovery. Government policy to give greater emphasis to literacy in primary schools was a fillip to some children's publishers, encouraging school and library sales. Some titles became more answerable to the needs of the National Curriculum, although this did create a tension between the book as entertainment and as a learning aid. In a multimedia age there has been a decline in the market for picture books and booksellers have reduced their range in this area. Publishers have to be more innovative in their pricing and combining the books with digital offerings.

By the end of the twentieth century an explosion in new children's fiction was apparent. This was led by J. K. Rowling's *Harry Potter* series, which not only rocketed the independent publisher Bloomsbury up the charts for retail sales in the UK, but also the books became international bestsellers and widely translated. They were attractive to a crossover market – read by children *and* adults – and stimulated consumer interest in children's books across the board (and interest from film companies in children's book properties). In fiction, the importance of the branding of authors, such as Jacqueline Wilson, Philip Pullman and Francesca Simon, strengthened. Publishers were keen to develop series based around the fictional characters, which could lead to sales of associated merchandise. In the early years

Table 2.5 Carnegie Medal winners 1998 to 2007. The medal is awarded by children's librarians for an outstanding book for children and young people

<i>Year of award</i>	<i>Author</i>	<i>Title</i>	<i>Publisher</i>
2007	Meg Rosoff	<i>Just in Case</i>	Penguin
2006	Mal Peet	<i>Tamar</i>	Walker Books
2005	Frank Cottrell Boyce	<i>Millions</i>	Macmillan
2004	Jennifer Donnelly	<i>A Gathering Light</i>	Bloomsbury
2003	Sharon Creech	<i>Ruby Holler</i>	Bloomsbury
2002	Terry Pratchett	<i>The Amazing Maurice and his Educated Rodents</i>	Doubleday
2001	Beverley Naidoo	<i>The Other Side of Truth</i>	Puffin
2000	Aidan Chambers	<i>Postcards from No Man's Land</i>	Bodley Head
1999	David Almond	<i>Skellig</i>	Hodder
1998	Tim Bowler	<i>River Boy</i>	OUP

of the new century, children's publishing became a vibrant sector with publishers willing to invest in both authors and marketing in search of the next bestseller.

The major children's publishers include the children's imprints of Puffin, Ladybird and Dorling Kindersley (all in the Penguin group) and of the other adult consumer publishers such as Hachette UK, HarperCollins, the Bertelsmann companies of Random House and Transworld, Pan Macmillan, Simon & Schuster and Oxford University Press. There are other specialist children's publishers, which are not part of adult book publishing groups. The magazine and book publisher Egmont (majoring in licensed character publishing) is in the top rank of children's publishing. Others include Scholastic, Templar, Usborne and Walker Books. Parragon, which began as a packager, has expanded rapidly by publishing books for supermarkets, and extended its reach into high street retail by becoming the licensed publishing partner of Disney. The rapid growth of Bloomsbury has depended largely on the *Harry Potter* series.

It is important to note that the children's publishers sell their books through many different distribution channels beyond booksellers, such as direct to schools (for example Scholastic and Troubadour).

AUDIO AND EBOOKS

At the time of writing the audio market in the UK is relatively undeveloped, with a survey on behalf of the Audiobook Publishing Association finding that only 8 per cent of consumers had listened to an audiobook in the last year (*The Bookseller*, 6 April 2007). Sales figures for 2006 showed the overall market in the UK to be worth £71.4 m – adult titles sold £50 m and children's titles the remaining £21.4 m. For adult titles three times as many units sold were for the abridged version compared to the unabridged, while it was fairly evenly split between abridged/unabridged in the children's market.

CHAPTER 4

The characteristics of the main publishing sectors

The last two chapters have traced the development of the book publishing industry across its various sectors. Common themes can be identified but there remain differences in the ways books are published for different markets. Publishers specialize in reaching particular markets, and each market has a separate dynamic. The skills of their staff, the activities they perform and the structure of the business are aligned accordingly.

UK PUBLISHING

Table 4.1, using figures from The Publishers Association, gives the scale of the UK publishing industry in 2006 based on publishers' sales. The size of the domestic market was estimated at £3.3 bn in terms of *end-purchaser prices* (see the pie chart opposite), an increase of 3 per cent on the previous year. There were around 2,300 book publishers registered for VAT, plus thousands more individuals and organizations publishing a narrow range of titles (publishers.org.uk).

The number of titles published in the UK in 2006 – 115,522 – was around the level of 10 years previously. In 2005 over 625,000 separate titles were sold in the UK market, and the top 500 titles accounted for 24 per cent of sales (OFT).

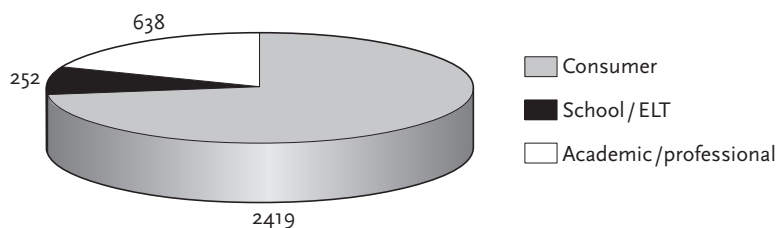
All kinds of publishers can be described as serving niche markets. Attaining a critical mass in a particular field, right down to a list of books on the narrowest subject area, is vital to publishers of every size. It allows the employment of editors who understand and have contact with authors and associates in a particular field, and who can shape projects for their intended markets. A respected list attracts

Table 4.1 UK publishers' sales in 2006 (source: The Publishers Association)

	Home	Export	Total
Volume of books sold (m)	472	314	786
Sales (£m)	1,814	999	2,813

Table 4.2 Number of titles published in the UK 1996 to 2006 (source: Nielsen BookData)

Year	Number of titles and new editions
1996	114,153
1997	112,916
1998	123,580
1999	130,053
2000	124,941
2001	123,679
2002	125,449
2003	131,271
2004	124,027
2005	110,925
2006	115,522



UK domestic book market – sales of books at retail value in 2006 (£m) (source: The Publishers Association)

authors. Furthermore, a list of books needs to generate sufficient turnover to allow effective marketing and selling, which in turn feeds new publishing.

Books in the UK are zero rated for VAT alongside newspapers, magazines published at regular intervals (more than once a year), and printed music. VAT is charged on digital products such as CD-ROMs and online content.

Themes shared across publishing sectors include the growth of digital publishing, changes in publishing processes, and the search for new talent, sometimes from outside the industry. The larger companies have shown an increased interest in corporate social responsibility (CSR). Pearson is 'guided by the UN Global Compact's 10 principles on labour standards, human rights, business ethics and the environment', and aims to review the performance of its suppliers against the Global Compact (pearson.com). In the area of environmental impact, HarperCollins set itself the target of achieving carbon neutral status by the end of 2007, and all its 4th Estate titles are now printed on recycled paper.

Four-colour book
jackets being
laminated at
Lightning Source



material glued to the spine to reinforce the hinge with the case, and the spine sometimes rounded. Meanwhile the case is made by gluing the front and back boards (and paper backstrip of the spine) to the 'cloth' which in turn is blocked with the title, author and imprint in gold, silver or a range of different colours. The outer sides of the end papers are pasted, the finished case dropped over the book (spine-side up), and the book squeezed. The jacket is printed on a small colour press, sometimes by another firm. This is often laminated with clear plastic film and wraps the finished book. Sometimes the printed cover is glued to the case before binding to produce a *printed paper case* (PPC) or *cover to board* book.

Sewn bindings are stronger but more expensive. Adhesive binding methods are commonly used for paperbacks and some hardbacks. *Perfect binding* is used typically for cheap paperbacks – the spine folds of the sections are cut off and the spine edge of the now individual leaves roughened. Glue is applied to hold the leaves together and to stick the printed cover to the book, which is then trimmed on three sides. The cover may have been varnished (on a printing press or special machine) or laminated. Another method, cheaper than sewing but stronger and more expensive than perfect binding, is known variously as *slotted*, *notch* or *burst* binding. The spine folds of the sections are not cut off. Instead they are perforated during sheet folding. The binding machine merely injects the adhesive to hold together the folded sections, applies the cover and trims the book.

Packing and distribution

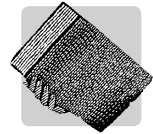
The printer/binder packs quantities of the book by shrink wrapping, parcelling or in cartons and delivers them on pallets to the publisher's specified warehouse. Printers have traditionally delivered the bulk stock of new titles to the publisher's warehouse, which in turn ships them out to the main retailers and wholesalers. However, UK printers, competing on service against foreign printers, may deliver stock directly to some key customers. In the case of print journals, they may deliver to subscribers.

Now read this

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**Web resources**

www.bapla.org British Association of Picture Libraries and Agencies.
www.crossref.org CrossRef operates a cross-publisher citation linking system.
www.doi.org International DOI Foundation.
www.tasi.org.uk Technical Advisory Service for Images.
www.worldbank.org/infoshop A video shows the Espresso Book Machine in use at the InfoShop at the World Bank in Washington DC.



institutional repository a digital collection of research papers by members of an institution such as a university

intellectual property (IP) a publisher's IP includes its copyrights and licences

IPG Independent Publishers Guild

IPR intellectual property rights

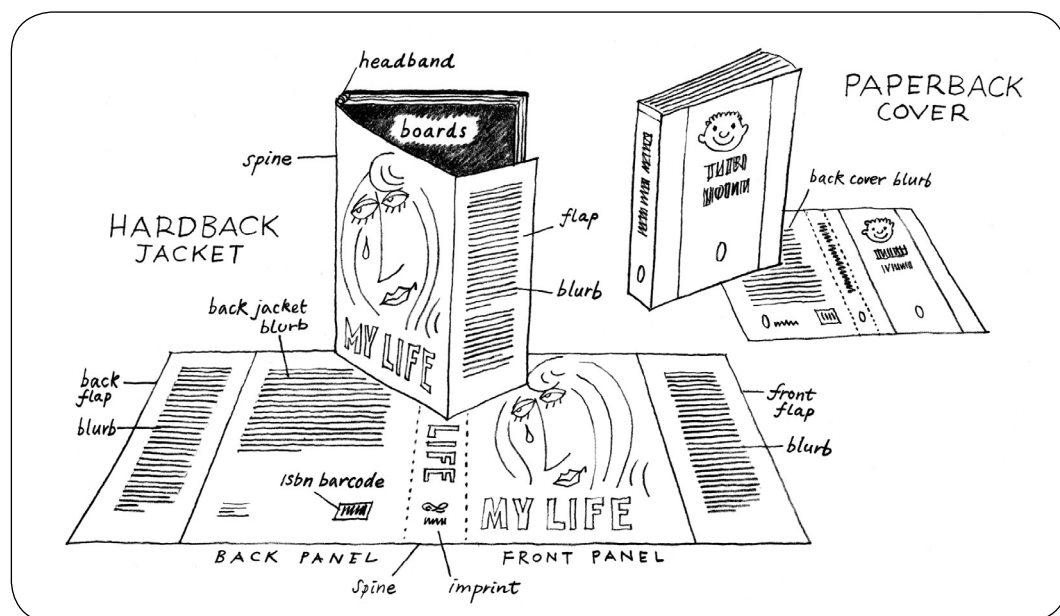
IRI industry returns initiative

ISBN international standard book number

ISP internet service provider

ISSN international standard serial number

jacket the dust jacket wrapped around a hardback book



JISC Joint Information Systems Committee

JPEG joint photographic experts group

leading the spacing between lines of text

licence a licence gives a publisher the sole, exclusive right to publish an author's work and sell it as widely as possible. The publisher also licenses a book to other publishers, for example for translation. A *non-exclusive* licence enables the publisher to sell content – for example for digital use – to a number of companies

list-building taking a strategic view of commissioning in order to create a new publishing list or expand the present publishing programme

literal error introduced in keyboarding a text; also called a **typo**

litho offset lithography. This form of printing is still common for many books

LMS learning management system

Long Tail first proposed by Chris Anderson in 2004 in *Wired* magazine, the idea that there is greater total value in the Long Tail of less popular products (available over the internet) than in the more widely available hits

- manuscript (ms)** the author's version of the work. Now often referred to as the *typescript*, it was originally handwritten
- marketing mix** product, price, place and promotion
- mass-market paperback** A format paperback – 178 × 110 mm; compare *trade paperback*
- metadata** data about data. This enables content to be categorized and found more easily in online searches
- monograph** scholarly work based on the author's primary research
- moral rights** additional to copyright, these statutory rights granted to the author are the right to paternity, the right of integrity, the right to prevent false attribution and the right to privacy
- NBA** Net Book Agreement
- net receipts** the revenue received by the publisher after a discount has been given to a wholesaler or retailer. Also called net sales revenue (NSR)
- notch binding** see *slotted binding*
- NSR** net sales revenue
- OA** open access
- OCR** optical character recognition
- OEBF** open ebook format
- OED** *Oxford English Dictionary*
- offset fee** a fee payable to reproduce the original setting of a book
- on-screen editing** copy-editing on screen rather than on a paper print-out
- OP** out of print
- OPuS** Oxford Publishing Society
- OUP** Oxford University Press
- outdoor advertising** advertising on billboards, buses and trains
- overheads** the ongoing costs of running a business, for example office costs and salaries
- PA** The Publishers Association
- packager** separate from a publisher, a packager supplies an edited and designed book for the publisher to market and sell
- pay per view** users of an online service pay for access to individual articles, chapters, pages
- PDA** personal digital assistant
- PDF** portable document format
- Perfect binding** the binding method used for cheap paperbacks. The spine folds of the sections are cut off and the spine edge of the now individual leaves roughened. Glue is applied to hold the leaves together and to stick on the cover
- PLS** private language schools
- POD** print on demand. Digital printing enables the economic printing of short runs. True print on demand is the ability to print single copies to order
- podcast** a series of digital or audio files available for syndication or download
- POS** point of sale
- positioning** placing the product in the mind of the consumer
- postprint** a journal article after peer review. This is the version that is typeset and published
- PPC** Publishers Publicity Circle