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INDUSTRY BRIEF NO. 1: KEY FINDINGS

The Australian book industry: Authors, publishers and readers in a time of change

October 2015

The Australian Book Industry: Authors, publishers and readers in a time of change' is a three-year research project led by Prof. David Throsby, funded by the Australian Research Council under Discovery Project grant DP 140101479 and Macquarie University. In February 2015 the researchers conducted an online survey of over 1,000 Australian book authors.

INTRODUCTION

In February 2015 the Macquarie University research team surveyed Australian book authors about the impact of changes in the industry on their creative practices and livelihood, particularly in response to technological changes that are currently affecting the book industry worldwide. Nearly 30 organisations including authors' professional associations, writers' centres, government departments and the Copyright Agency were involved in the design of the research or promoting the survey to their members, following which over 1,000 authors completed the online survey. When we invited authors to participate, we undertook to provide them with industry briefs summarising the findings in addition to the academic papers that will arise from this project. This series of briefs is the result.

One of our first tasks was to devise an appropriate definition of a book author for the survey. Given the large range of publication formats available to book authors and the innovation and experimentation being undertaken by some authors, the researchers worked with a number of authors' organisations to ensure our criterion took into account contemporary developments.

Ultimately, survey participants were required to have met the following criterion: they had authored one or more published books including fiction, non-fiction, poetry, short stories, educational books and scholarly works, in formats which included traditional print publishing, epublishing, self-publishing, multi-platform works or other equivalent book-length publications (including other digital platforms and related performance works). Ineligible activities included marketing-based activities on websites, blogs or social media, online games, TV programs or films.

After validating the screening process and removing clearly questionable responses, rank outliers and those where important variables had missing values, the analysis in these briefs is based on 993 responses from book authors who reside in Australia[1]. Further detail about the survey methodology, including the survey questionnaire, is available in a working paper: Book Authors and their Changing Circumstances: Survey Method and Results. Section 8 of the working paper utilises the 2011 Census and a 2010 survey of artists' income to confirm that the sample generated for the present survey is a valid representation of the population of Australian book authors.

We asked authors detailed questions about the genres in which they have published work, and the main genre that is most important to their writing now. We summarised the responses as follows:

(1) Trade books

- Fiction
  - Literary fiction
  - Genre fiction
  - Children's fiction
- Non-fiction
  - Creative non-fiction[2]
  - Other non-fiction (including illustrated books for adults)
- Poetry

(2) Educational books/textbooks

(3) Scholarly books/research monographs

Much of the analysis in these briefs is organised according to these categories.

DEMOGRAPHICS

The profession of book author in Australia is predominantly female. Overall, women make up two thirds of book authors and they outnumber male authors in most genres, especially children's books. Education and scholarly authors come closest to having an equal balance between the genders. (One area for future investigation is whether we can identify different patterns in the career progression of male and female authors.)

As a group, Australian book authors are more highly-educated than the general population. More than 80% of authors have attended university and almost half of authors have completed a postgraduate degree, with postgraduate education common across all the different genres. However, as will become evident in discussion further on, high levels of formal education are not broadly matched by high levels of income.

Professional book authors are relatively old compared to Australia's population (half of book authors in the survey are aged 40-59 years, and nearly 40% are older). Although the average age of authors in the survey is slightly older than in the 2011 ABS census, the distribution of age is a close match to a 2010 survey of artists' income in Australia. One reason for the slightly older group of book authors

[1] The researchers focussed on authors who resided in Australia in this set of findings in order to compare the spread of responses to other reputable surveys in order to check the validity of the data, in particular the 2011 Census and a 2010 survey of artists' income, Do You Really Expect to Get Paid? An Economic Study of Professional Artists in Australia prepared by Prof. David Throsby and Anita Zednik for the Australia Council for the Arts.

[2] Also known as narrative non-fiction; examples include biography, autobiography, history, politics, true crime, travel and sporting accounts, long-form journalism, memoirs and essays.

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could be due to our screening criterion, in which a writer needed to have had a book published to be eligible for the survey. The older age of authors may point to a possible misalignment between general media interest in new, emerging writers who tend to be younger and the reality that the majority of professional book authors are likely to be older, especially if they have successfully authored and published a number of books.

Three quarters of book authors write trade (consumer) books, and one quarter write education or scholarly books. The highest proportion of survey respondents comprises genre fiction authors (28%), followed by education (15%), creative non-fiction, children's and scholarly (10% each), literary fiction and poetry (9% each) and other non-fiction (8.5%).

Approximately 40% of authors describe themselves as emerging or developing and another 40% identify as being an established author or established but working less intensively than previously.

Not surprisingly, the majority of authors live in New South Wales, followed by Victoria, consistent with the spread of Australia's general population. One feature of new communication technologies is the potential for authors to maintain stronger professional connections regardless of their location. Over 60% of book authors live in a capital city, with an additional 20% located in a regional city or town. Half of all writers who live outside a capital city find that this has an impact on their practice as an author, with half of these assessing it as negative and nearly one third as positive.

Australian book authors are very likely to have been born in Australia or in another English-speaking country. Nearly three quarters were born in Australia, another 10% were born in England and a further 9% in other English-speaking countries. The vast majority of Australian book authors speak English as a first language (97%), suggesting that in Australia's multicultural society, second-generation or subsequent generations from non-English speaking immigrants are most likely to develop this career.

The highest proportions of authors who do not speak English as a first language are scholarly (6.1%), literary fiction (4.5%), genre fiction (3.5%) and other non-fiction (3.2%) authors. Two percent of authors have written a book in a language other than English, with the most common languages being French and German.

AUTHORS' EARNINGS FROM ALL INCOME SOURCES

It's well known that book authorship is not well-remunerated for many members of the profession, and the findings of this survey bear this out.

Despite working long hours in a variety of jobs to make ends meet, when all sources of income are taken into account not quite half of all authors (43%) earn the average annual income for the Australian workforce in 2013-14 FY or higher ($61,485). [3] This figure is boosted by education and scholarly authors. If we focus on trade authors, just under two thirds of all trade authors earn less than the average annual income for this period (taking into account all sources of income).

When all sources of income are included, the average total income for authors is $62,000[4] and the average income derived from practising as an author is $12,900. Overall, education and scholarly authors have the highest average total income, reflecting income from sources other than their creative practice as a writer. (A higher proportion of education and scholarly authors also describe themselves as being at an established stage of their career.)

The researchers also analyse the spread of income within the genres by examining the range of incomes within a particular group of genres. We examine the average earnings by the highest-earning 25% of authors in each genre[5], the median income, and the average earnings among those authors whose earnings are in the lowest 25%.

When all sources of income are taken into account, the highest average earnings among the top 25% of income earners are by scholarly and education authors, who earn an average of $130,000 (scholarly authors) and $110,000 (education authors). The next highest category is literary fiction authors with an average for the top 25% of earners of $85,000. The average of the highest-earning 25% from all of the other genres is $75,000.

There is greater variation in the median – or mid-point - income of authors across the various genres. Once again, the highest median income is received by scholarly authors ($85,000), followed by education authors ($75,000). The next highest income is received by literary fiction authors ($50,000), followed by creative non-fiction and other non-fiction authors ($45,000). The remaining categories of author have a median estimate of $35,000. Apart from scholarly and education authors, the average incomes are below the ABS Australian average annual earnings for this period.

[3] The comparison is based on ABS data: 63060DO011_201405 Employee Earnings and Hours, Australia, May 2014.

[4] As noted, the higher total income earned by some types of authors (especially scholarly and education authors) and some high-earning individuals increases the overall average but the majority of trade authors earn less than this amount.

[5] The highest possible total income for authors is calculated at $250,000 according to the methodologies used in this research. This may underestimate the income of a very small number of high-earning authors, but the methodology enables us to look at the spread of authors' earnings with some confidence.

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However, nearly one fifth of authors earned $101,000 or more in the 2013-14 financial year. Once again, the highest proportion within each genre in this band of income constitutes scholarly (44.4%) and education (26.5%) authors, followed by literary fiction (15.7%), creative non-fiction (15.3%), other nonfiction (14.7%), poetry (14.3%) and genre fiction authors (12.8%). (These percentages are calculated as a proportion of authors in each genre who earn over $101,000.) The findings demonstrate that while the majority of authors earn modest total incomes, some authors are able to earn a good living, especially if they can derive income from a range of sources.

Finally, 2.5% of authors are in the highest income band of $200,000+, including income from all sources. The highest representation in this select group is by education and scholarly authors, followed by literary fiction, genre fiction and children's authors.

AUTHORS' EARNINGS FROM THEIR CREATIVE PRACTICE

When we consider authors' average income from their practice as an author, earnings are significantly lower than authors' total income. The highest average earnings from practising as an author for the top 25% of authors are associated with education authors ($16,500), followed by children's authors ($14,000) and genre fiction authors ($11,100). The lowest average earnings received by the top 25% of earners are associated with poets ($4,900).

The income earned from practising as an author among the lowest-earning quarter of income is modest across all the genres, from $900 to $100.

Although nearly 20% of authors work full-time on their creative practice, less than 5% of authors earn the average annual income from their creative practice alone. There are only two categories of authors represented in the highest band of income of $200,000+ derived from an author's creative practice alone. These are genre fiction and education authors.

Many authors supplement income from their creative practice in a variety of ways. Nearly half of all authors supplement this income with a job that is unrelated to being an author. Another important source of income is from an author's partner (37.3%). One quarter of authors work in a job that is related to being an author but does not directly lead to the production of a creative work. A smaller proportion of authors rely on credit card debt, unemployment or other government benefits and loans from a family member or a friend.

One aspect of authors' income that this research did not capture is the volatility of authors' income from their creative practice from year to year. In feedback provided by survey participants on the questionnaire, a number of authors noted that they have not yet received any royalties from their latest book. Therefore, while this survey provides a snapshot of authors' income in a particular year it does not mean that these figures are constant for individual authors. The following financial year could entail greater prosperity – or a decline in income – derived from an author's creative practice, a situation that several authors emphasise as a key characteristic of their profession.

CHANGES IN AUTHORS' FINANCIAL POSITION

When we ask authors about the impact of changes in the industry over the past five years on their financial position, 40% of authors respond that there is no change, 15% are better off and 15% are worse off. Nearly 10% report greater variability in their financial position. The 17% who respond 'don't know/can't say' may be more recent participants in the industry as authors or simply may not be able to make a judgment.

However, when we examine the data further, some disparities emerge. Genre fiction authors appear to be the major beneficiaries of change with over one quarter assessing that they are better off. (Closer investigation reveals that they are more likely to be at an established stage of their career.) Although 9% of literary fiction authors report an improvement in their financial position, literary authors are the largest group by a significant margin who are experiencing a deterioration (30%) in their financial position. Children's authors are experiencing the highest levels of variability in their income (14.1%) and second-greatest level of deterioration (19.2%) in their income. While some children's authors may have benefited from the strengthened retail presence of discount department stores such as Big W and Target in the Australian market, others may have been disadvantaged by the closure of traditional bookstores. The experience of education authors is close to the average of all authors. In preparatory research prior to the survey, some education authors told of a reduction in the number of new commissions from their publishers and lower sales of education books to schools due to financial constraints and new school library purchasing policies. Poets and scholarly authors are the most likely to report no discernible change, perhaps because income from poetry and scholarly works continues to be modest, with poets and scholarly authors reliant on other forms of income. A high proportion of creative non-fiction and other non-fiction authors also experience no discernible change to their income (over 40%) but other non-fiction authors are also slightly more likely to report a deterioration in income than other genres.

One factor that contributes to these outcomes is suggested by a senior Australian publisher. It relates to the closure of REDgroup Retail in 2011, which owned Borders and the Angus and Robertson chain of bookstores and was responsible for 20% of trade sales in the Australian (onshore) market. The book industry's view is that apart from the stores that were taken over, the closure of the remaining bookstores contributed to a contraction of book sales because many consumers didn't buy books elsewhere, instead they spent their discretionary income on other goods. Literary fiction, children's and illustrated book authors are likely to be among those most affected because bricks and mortar bookstores are particularly important for the sales of these types of books. In contrast, during the

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past five years discount department stores (DDS) have increased their retail market share of books in Australia. Authors of genres which are sold through these channels may have benefited, such as genre fiction authors. Further, ebooks are a popular format for genre fiction, which may have been financially beneficial for some genre fiction authors.

CHANGES TO AUTHORS' PRACTICE

Overall, the greatest impact of new technologies is on authors' practices. The most widespread impact is on promotion, with trade authors affected far more than education and scholarly authors. Genre fiction (91%), children's (83.5%), and poetry (82%) are the most likely to have experienced a change in promotion, but approximately three quarters of literary fiction, creative non-fiction and other non-fiction authors are affected.

A key aspect of technological change is the increase in the number of publishing formats. Genre fiction authors are the most likely to report that they have changed the way their work is published or distributed (84%), reflecting the uptake of ebooks in genre fiction as a contributing factor. Poets also have a high rate of response (73.5%), which could reflect shifts to digital printing by small, boutique poetry publishers, print on demand, and the use of the internet and social media as new forums for publishing poetry. However, nearly 70% of all authors are affected in this way.

Another area of change is in the way that authors interact with their readers, with trade authors more likely to be affected than education and scholarly authors. Overall, two-thirds of authors are experiencing this change. Once again, the highest proportion of change is by authors of genre fiction (87.5%), followed by children's books (72.4%).

Accessing new readers is vitally important, and nearly two thirds of authors are able to access readers using new technologies. Genre fiction authors are particular beneficiaries of this change (85.8%), followed by poets and literary fiction authors. Further, over half of authors report that new technologies have opened up new avenues to publish paid, original work, with genre fiction authors (78.5%) and poets (69%) the most affected.

At the 'typeface' (rather than the coalface), over half of authors report that new technologies are changing the way they draft their work. Over one quarter of all authors have composed, edited and published a substantial creative work without a print version being part of the process. Nearly one quarter of all authors have shown drafts of their work in progress in online forums (closed or public) to gain feedback from other authors or readers.

The authors who experienced these changes were asked if the changes have been positive or negative. Changes in the ways that authors create drafts of their work (91%) and the ability to access new readers (90.6%) are viewed the most positively. However, the impact of all changes is viewed generally as positive.

ALLOCATION OF TIME

Nearly one fifth of authors work full-time in this role. The highest proportion of full-time professional writers is in genre fiction, followed by children's and literary fiction. Nearly one third of authors work part-time as writers, and one quarter occupy a professional position in another field in which writing books is an important output.

Many authors deal with considerable constraints on the time they have available for their creative practice. Authors spend on average about 43% of their working time on their creative occupation as a writer, including writing, research, administration, promotion, networking, etc. This amount of time is matched, on average, by other paid work.

We asked authors about the factors that prevent them from spending more time on their writing. Over half of authors are limited by domestic responsibilities and/or the requirement to earn income by means other than their own creative work. Over one third of authors are limited by the demands of another job, nearly one third by other tasks associated with writing and nearly one quarter of authors are constrained by time spent on marketing and promoting their work.

RIGHTS SALES, TRANSLATIONS AND PIRACY

We asked authors about some specific international dimensions to their practice as an author. Nearly half of all authors (44.5%) have sold overseas rights to their work during their careers. It's important to note that this does not adequately represent the international reach of Australian-authored books, even in terms of sales. For example, it does not include authors who sell current and/or backlisted titles from their own websites, and who successfully self-publish to international platforms such as Amazon (with some achieving considerable sales according to our preliminary research). It also does not include authors who use the Internet as a medium for publishing their work directly for Australian and international readerships, for example a number of Australian poets, literary and other writers. Taking all these activities into account, it is clear that well over half of Australian book authors have been or are engaged with international readerships.

Nearly one third of authors have had their work translated, including over one half of poets[6] and children's authors. The most common languages are German, French, Chinese (Mandarin and/or Cantonese), Spanish, and Italian. While German and French are the most popular languages for genre fiction and literary fiction translations, Chinese

[6] It's possible that this figure includes the translation of individual poems in addition to collected works.

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languages are the most popular for poetry, scholarly works and education. The most popular language for translated children's books is Korean.

A less desirable aspect of internationalisation and digitisation is piracy. Over one quarter of authors have had their work pirated and an additional quarter are unsure. Genre fiction authors are the most likely to have had their work pirated (44.7%), followed by education authors. One fifth or more of literary fiction, other non-fiction and children's authors have had their work pirated. Over half of book piracy is occurring via file-sharing sites, and nearly one tenth through social media.

PROMOTION

Over 20,000 new book titles were released in Australia in 2014[7]. Authors, publishers and booksellers face a substantial challenge in drawing the attention of potential readers to their new works in the face of competition from other new and existing titles (known as 'discoverability'). Members of the Australian book industry also have to contend with a broad range of other media and entertainment options that compete for the attention of potential book readers.

Trade authors are particularly affected by changes in the promotion of books, with over half of trade authors spending more time promoting their work than five years ago. In particular, genre fiction and literary fiction authors are the most affected, followed by authors of children's books and poets. Education and scholarly authors are less affected, with only approximately one quarter of education and scholarly authors experiencing this change.

New technologies have increased the ways in which books can be promoted, including the Internet, blogs, social media, e-newsletters, making available additional content online and providing free samples of work. Trade authors are more likely to engage in a wider range of promotional practices than educational and scholarly authors. One quarter of education and scholarly authors have not undertaken any of the promotional activities listed in the survey questionnaire.

When we asked authors who has the greatest responsibility for promoting their work, nearly half of authors nominate themselves, followed by one quarter who nominate their publishers and 14% who select their readers. In practice, there is often a combination of people responsible for promoting a new book title. For example, Australian bricks and mortar booksellers are recognised as playing a particularly important role in 'hand selling' (through personal recommendations) the work of new Australian authors and other Australian titles.

We also asked authors about the importance of serious reviews of their work, general reader reviews and winning a well-regarded prize in their genre for sales of their work. Overall, two thirds of all authors consider serious reviews of their work important for sales, particularly authors of literary fiction (86.5%), scholarly works (75.8%) and poetry (70.2%).

A notable change in the book industry is the increased access to book reviews by other general readers. Nearly two thirds of authors regard general reader reviews as important for the sale of their work. These are particularly important for trade authors, especially genre fiction (80%) and two thirds of children's authors.

Australia hosts a considerable number of book awards in addition to international literary and genre awards. Winning a well-regarded prize relevant to an author's genre is regarded as most important for poets (60.7%), literary fiction (55.1%) and children's (49.5%) authors.

A high proportion of trade authors use websites and social media to promote their work but live events in a range of forms and formats are also important. In general, it appears that websites and social media have not supplanted live appearances, rather, they supplement one another (although in some cases, communication technologies enable authors to make live appearances from remote locations). Further, industry advice is that the physical display of books in bricks and mortar retail outlets remains important, although the survey did not address this.

Several authors noted that they have undertaken a number of the promotional activities listed in the questionnaire but they are unsure whether or not these have increased sales of their books. As the options for promoting books continues to increase, it's likely that authors and publishers will enhance ways to measure the effectiveness of various promotional tools.

AUTHORS AND PUBLISHERS

Overall, one quarter of authors are not currently working with a publisher (other than self-publishing). There could be a variety of reasons for this, including that authors are between projects, authors are working on a project without a publisher attached at this stage, authors are working less intensively than previously in their careers, or authors have nominated to self-publish their latest work. Over 42% of authors are working with one publisher. One third of authors are working with more than one publisher, including over half of scholarly authors and nearly half of children's authors.

[7] The exact figure provided by Thorpe-Bowker, the company which manages ISBNs for the Australian territory, is 20,877. While this number includes several ISBNs for one new book title published in multiple formats, it does not include additional books published directly to Amazon or other online platforms with their own cataloguing system, not does it include self-published print books without an ISBN. As such, this is a conservative estimate.

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We asked authors how satisfied they are with their current relationship with their main publisher. [8]Nearly 20% of authors overall are very satisfied, and another 35% are satisfied. If we combine these two categories, the highest satisfaction rate is by education authors (61%), scholarly authors (57.9%) and genre fiction authors (58.8%). Overall,

30% of authors are 'neither satisfied nor dissatisfied' and 15% of authors are either dissatisfied or very dissatisfied with their main publisher.

PUBLISHING FORMATS

Traditional publishers still play the most important role in bringing the work of authors to publication. The most frequently nominated format for works published in the previous year is a print book by a traditional publisher (44% of authors), followed by an ebook by a traditional publisher (34.3%). Other popular media formats include a blog or other social media (29.9%) and website (28.4%). Nearly one fifth of authors have published work in a print or online magazine and/or a print or online literary journal. Further, a substantial proportion of authors have self-published a print book or an ebook, discussed next.

SELF-PUBLISHING

Nearly one in five (19%) authors have self-published a print book or an ebook or both in the previous year. Genre fiction authors are by far the most active: over one third have self-published their work, especially in ebook format. Across all the genres, over one in ten authors have self-published an ebook (14.7%) or a print book (11.9%). Poets, creative non-fiction and other non-fiction authors are also particularly engaged with self-publishing. Authors are less likely to use a book production 'services' company but rates of self-publishing where the author managed the whole process him or herself are substantially higher than these services.

We asked authors about their motives for self-publishing. The most popular reason is to have creative and financial control of their work (59.4%), followed by just over one third of authors who are unable to interest a traditional publisher in their work. Further, 28% of authors report that self-publishing is becoming increasingly common in their main genre, most notably in poetry, education, creative and other non-fiction. Approximately one quarter of authors seek to increase their income and/or to attract new readerships. Nearly one fifth of authors self-publish as an experiment to keep up with the technology. The survey did not ask authors about their satisfaction with the outcome of self-publishing but comments in the survey indicate that a small number of authors are disappointed. This is a potential area for investigation in future research.

CONCLUDING COMMENTS

If we were to point to one group of authors as a beneficiary from changes in the industry, it would be genre fiction authors. One quarter of genre fiction authors report an improvement in their financial position over the past five years, particularly established genre fiction authors. Genre fiction authors, more than other authors, are affected by the impact of technology on new forms of promotion, changes to the way their works are published or delivered, the ways they interact with readers, opportunities to access new readers and new avenues for paid work. They are most likely to have benefitted from changes to the retail distribution of books in Australia. One third of genre fiction authors have self-published, a far higher proportion then other authors (although their satisfaction with the outcome is not known). A considerable percentage (13%) of genre authors earned more than $101,000 in the 2013-14 FY and genre fiction is one of two genres represented in the highest income band in the survey from creative practice alone. On the downside, genre fiction authors are by far the most likely to report that their work has been pirated.

However, while genre fiction authors at the highest end of income earners perform particularly well, they are not the best remunerated authors across a broad range of income levels. Scholarly and education authors have the highest overall incomes, reflecting well-paid employment in universities and other educational institutions. They are also the most likely to report that they are established in their career. They are the most highly educated authors in general, although authors in all genres have a high level of university and post-graduate education. Scholarly and education authors are less likely than trade authors to be affected by changes to their practice as an author, with over one quarter unaffected.

The situation for the top 25% of income earners among literary fiction authors is also relatively favourable. They earned an average of $85,000 from a range of sources, and 15.7% of literary fiction authors earned over $101,000 in the 2013-14 FY. However, the situation for authors outside the top 25% of income earners is more difficult. Over 70% of literary fiction authors are prevented from spending more time on their creative practice by insufficient income from their creative work or the need to earn more income elsewhere, the highest proportion of any group. Literary fiction authors comprise the largest group which have experienced a deterioration in their financial situation due to changes in the industry (nearly one third). One factor may be the closure of bookstores owned by the REDgroup Retail, because bricks and mortar bookstores are important retailers of literary fiction.

Children's authors are particularly likely to benefit from new technologies for new promotional activities (83.5%) and interacting with readers (72%). Children's books recorded particularly strong sales in Australia during the period of the survey, and industry data demonstrate that ebooks had less impact on sales of children's books while

[8] The definition of their "main publisher" was not specified in the survey.

print formats remain relatively popular. Children's authors are the most likely to have sold rights for overseas publication to their work (60%) and over half of children's authors have had their work translated into another language, the second-highest proportion after poets.

While over half of poets in the survey have had their work translated into another language, the low financial returns to poets from their creative practice are evident in the findings. The average earnings received by the highest-earning 25% of poets are the lowest compared to other genres ($4,900). New technologies do not appear to have assisted most poets to earn a higher income - poets are one of the largest groups to report that their income levels are unaffected by new technologies. However, poets are using new technologies to publish and distribute their work, to engage with readers and to find new readers, to find new avenues for paid work and to self-publish. They are the second-highest group to use new technologies to promote their work (80% of poets). In these ways (in addition to the craft of poetry composition), the findings suggest that it is a dynamic field; however in terms of economic scale it remains a niche part of the Australian publishing industry.

Creative non-fiction authors, like the other authors in this survey, are likely to have changed their practice as a writer due to the impact of new technologies. They are more likely to release their backlist as ebooks, and like other authors, nearly three quarters use new technologies for promotional activities. Nearly half of creative non-fiction authors report that their financial position is unaffected by changes in the industry. Overall, these authors' average income levels are neither the highest nor the lowest across the genres. While 15% of creative non-fiction authors earn over $101,000 and 1% earned $200,000+, nearly 40% earned below the average annual income for this period.

The impact of new technologies on the practices of other non-fiction writers, including authors of illustrated books, is very close to the average of all types of authors, that is, a high rate of impact overall. The impact of changes on other non-fiction authors' income is also close to the average of all authors but it's possible that they are one of the groups that has been particularly disadvantaged by the closure of bricks and mortar bookstores in Australia. One fifth of other non-fiction authors have had their work translated into other languages, and 44% have sold rights to their work in another country via a publisher or agent. Relatively little is known about other non-fiction authors and this is a potential area of further investigation by scholars of the Australian publishing industry.

In summary, the findings show that while some things have changed (particularly authors' practices) some things stay the same. The majority of authors still struggle to find sufficient time for their creative practice and most authors earn income from other sources which constitute the majority of their livelihood. While traditional publishers are still the most important means for bringing authors' work to readers, over one quarter of authors have self-published work, and authors themselves report that self-publishing is becoming increasingly accepted in a number of genres, most notably in genre fiction, poetry, education, creative and other non-fiction. The ways in which authors engage with international readerships is also becoming more complex. In addition to rights sales, translations and (unfortunately) piracy, new technologies have made direct access to overseas readers quicker and more convenient. It's difficult to predict with certainty how changes will unfold, but authors are part of a profession that is thousands of years old. The findings demonstrate that Australian authors are adapting to changes in the industry with resilience and resourcefulness.

This industry brief is part of a series prepared for Australian book authors and other members of the Australian book industry to highlight key findings of the 2015 survey.

Thank you to all the authors who gave generously of their time and expertise by participating.

The complete series of industry briefs about this survey is:

1. Key Findings
2. Demographics of Australian Book Authors
3. Authors' Income
4. Changes in the Financial Position of Australian Book Authors
5. Authors' Changing Professional Practices
6. Authors' Allocation of Time
7. Rights Sales, Translations and Piracy
8. Promotion
9. Authors and Publishers

See also the Department of Economics Working Paper, 'Book Authors and their Changing Circumstances: Survey Method and Results'.

These can be downloaded at:

http://goto.mq.edu.au/book-industry

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