

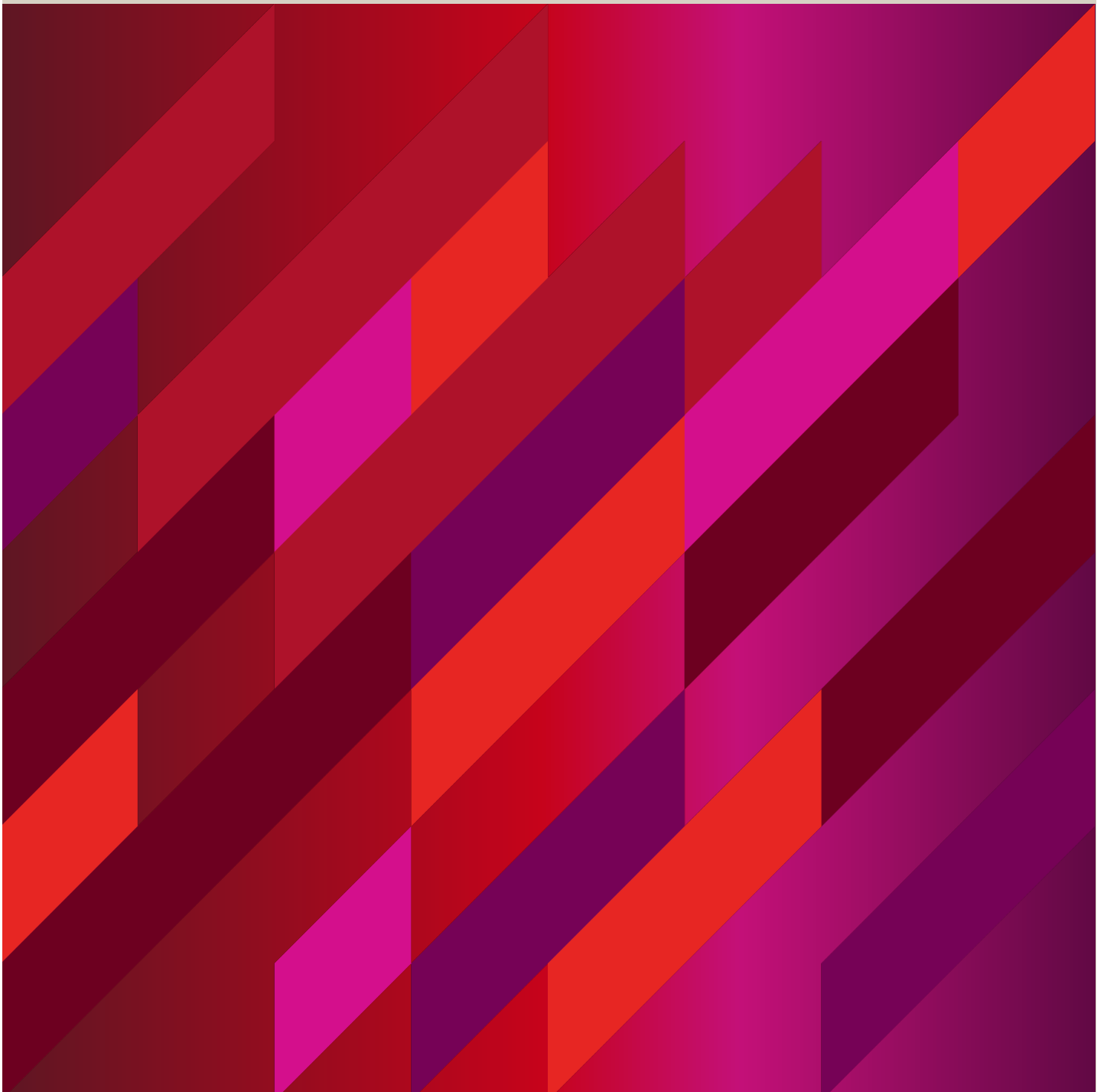


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Success Story- International Rights Sales of Australian- Authored Books: Main Report

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Introduction and Objectives

Over many years Australian book publishers, literary agents and authors have reported rights sales success in major English language territories such as the USA, UK and Canada and translation markets including Germany, France, China and Taiwan to the industry's *Books+Publishing's* 'Think Australian' e-newsletter and to the Visiting International Publishers (VIPs) program run by the Australia Council for the Arts. Anecdotally, the international success of Australian-authored books has been acknowledged and celebrated within the industry. Despite the important commercial and cultural contribution of these rights sales and other forms of export, there has been and remains a lack of unified research that examines the patterns of growth and nature of rights sales in a systematic way.

Previous research by Macquarie University found that approximately 50 percent of Australian authors have sold the rights to their work via an agent or publisher for publication in a territory other than Australia (Throsby, Zwar, & Longden, 2015a, p. 2). In practice, the most common overseas market for Australian-authored books is New Zealand, because the Australia New Zealand (ANZ) territory is a standard market in the international book publishing industry, but the economic and cultural reach of Australian-authored books extends much further. This international reach includes well-known Australian authors who achieve international bestseller status (for example, a listing in the *New York Times* bestseller list) and win international awards and recognition through to thousands of perhaps lesser known authors whose international success is reached via trade and cultural exchanges resulting in rights sales and non-traditional channels to international markets.

This project brings together Australian literary agents, publishers, authors, funding bodies and other key industry entities including professional associations to answer the following research questions:

- Has there been an increase in the success of international rights sales of Australian-authored books during the time-frame of the study (2008-2018), and if so, what factors have contributed to successfully securing those deals in overseas markets?
- What patterns in demand for different types of Australian books can be identified in overseas sales territories?
- How have models of how rights sales are secured changed over time?
- What has been the impact of the COVID-19 pandemic on international rights sales successes and opportunities?
- How can Australian literary agents, publishers, authors and funding organisations build on the current success of international rights sales to sustain international interest and increase international publication opportunities in the future?

Although this research investigates a potentially under-recognised aspect of the increasing international success of the Australian book industry and its authors, it draws on previous studies which examine the success of Australian books overseas dating back from the colonial period.¹ Contemporary industry reports from sources such as

¹ See, for example, Webby (2009, pp. 34-51), Bode (2014) and Carter & Osborne (2018).

Books+Publishing and anecdotal discussion by rights sellers at Australian publishing houses and literary agents suggested that prior to the COVID-19 pandemic Australian books were experiencing significant success overseas, perhaps on a broader international scale than ever before given the digital transformation of the global book publishing industry and the subsequent ease in connecting with international markets. The first objective is to establish a systematic overview of contemporary developments.

Further, it appears that unlike previous historical waves of overseas success of Australian books and authors, this time there is an additional underlying factor. The Australian book industry has developed a new scale and level of onshore capability to sell the rights to books by Australian authors overseas,² and have those books find direct readerships in other territories in both English and other languages. Therefore, this project also considers the ways in which the Australian industry's rights sales capabilities have developed over recent decades, although this preliminary work does not constitute a full scholarly examination.

A final key objective of this research is to consider how the Australian book industry can build on its success in a sustained way and increase future opportunities for rights sellers—publishers and agents—to secure new markets and readerships for Australian authors. Like many other industries, the COVID-19 pandemic has had a severe impact on the Australian and international publishing industry. Although Nielsen BookScan reported that Australian book sales were up 7.8 percent in 2020 (*Books+Publishing*, 2021), anecdotal evidence in written submissions to and public hearings by the House of Representatives Standing Committee on Communications and the Arts inquiry in 2020 suggested that established authors were most likely to benefit from these sales. Debut and emerging authors were more likely to be disadvantaged through the difficulties of publicising and marketing new titles during a pandemic. All authors were negatively impacted to some extent by the loss of income from speaking engagements and traditional avenues of promotion such as Australia's many and celebrated writers' festivals (Wood, 2020), as discussed further on. This study recommends ways that, as the industry recovers over the coming years, the publishing ecosystem of authors, agents and publishers can be well-placed to build on the international achievements outlined in this report and to pursue further opportunities for rights sales, co-editions and direct export, through strengthened and continued industry collaborations and appropriate policy settings.

² Technically, rights are normally licensed but the phrase 'selling rights' is the industry shorthand and will be used in this report.

What are rights sales of books?

While the success of individual Australian books and authors overseas is often reported and celebrated in the domestic news media, the ‘mechanics’ of rights sales are less well known outside the industry. In book publishing, the term ‘export’ refers to both the export of books in all formats (print, ebook and audiobook) and the licensing of rights to third-party international publishers.

Direct export of books involves shipping physical copies from a printer or a publisher’s warehouse to other territories, alongside the sales of ebooks and audiobooks from websites including the global sites of Amazon, Book Depository and Apple, as well as local retailers such as Booktopia. Titles available on export are normally the Australian edition, so will have the original Australia cover, publisher’s logo and Australian spelling. While Australian titles can be sold via export in all territories, as most Australian books are published in English, the edition available for sale would likely be in English (this English language edition would be the one available to a German resident, for example).

Another example of a licence is co-edition: a book that is designed for release in two or more territories by two or more publishers who collaborate so that the product will serve the needs of all markets. Heavily illustrated titles (such as picture books, cookbooks and reference titles) contain a large number of colour photographs or illustrations adding to printing and production costs. To achieve economy of scale, the originating Australian publisher will enter into agreements with third-party international publishers and coordinate the printing of physical copies. While the Australian publisher might have been considering a print run of 20,000 copies, the addition of another 50,000 copies for an American edition, 10,000 for a Polish, 15,000 for a British edition, can bring that print run to 95,000 copies allowing all publishers to achieve economy of scale. The third-party publishers are able to make changes to their specific print runs including to the logo, text (to translate it, for example) or cover. Authors normally receive a royalty payment as a share of net receipts in this model.

The other conduit to reaching international markets—selling rights—is through a license to a third-party publisher. The Australian literary agent, publisher or author will license an international publisher the right to edit, market, translate (if the acquiring publisher is in a market other than English), print and sell copies of that original title (in agreed formats). The process of securing these rights sales and licenses consists of many parts, but more crucially, it requires the rights seller (whether that is the literary agent, publisher or author themselves) to pitch a particular title to acquiring editors in all markets throughout the world. Australian rights sellers might work direct in some markets, such as the United States, Canada and the UK, or work with a network of co-agents. Co-agents (also known as sub-agents) are literary agents that represent publishing houses or other literary agencies and work in a specific market on behalf of the rights holder; they may also have their own authors. An Australian publisher or literary agent is likely to have a network of up to 30 co-agents who represent them in territories such as Germany, Russia, China, Brazil, Lithuania. The Australian publisher or literary agent works in tandem with their co-agents. No matter how well the Australian publisher or literary agent knows a particular international market, the co-agent—being ‘on the ground’—is the one with the specialised knowledge of the trends in that market, and the specific acquisition editor to approach. An important aspect is, of course, language. A co-agent is able to pitch an Australian work in the relevant language.

All of these paths to international markets (licensing rights, co-editions and direct export) hinge entirely on licensing of intellectual property.

Key terms relating to 'rights'

Publishing, like the film, television and music industries, is a copyright industry. Unless they've assigned it elsewhere, copyright will rest the author. When an author enters into a publishing agreement, they will grant certain rights to the publisher.

Along with commercial considerations—including advance and royalties—a publishing agreement will specify which rights are granted to that publisher. These include what format the publisher can publish in (for example, print, ebook, audiobook), the language of publication and the territories in which a work might be sold. Usually, this agreement will include a subsidiary rights clause which delineates those additional rights which the publisher may license to a third party. This might include serial rights (the right to publish an extract from a book in a magazine or newspaper), large print and audio rights, dramatisation or stage rights. It can also include English language rights (the rights to license rights to a third-party publisher, usually in North America or the United Kingdom in the English language) and translation rights (the right to license rights to a third-party publisher who will have the additional right to translate the text from English to the language of their market). These English language rights and translation rights are often collectively known as 'international' rights or 'foreign' rights. These international rights might be retained by the author or their agent who will then approach the international markets themselves. In this instance, the grant of territory to a local Australian publisher is limited to Australia and New Zealand, and dependencies.³

In a rights contract, it is important to look at both the language and territory. When English language rights are sold it is common for the distribution area to be limited. This may mean it is limited to one country—Canada, for example—or to multiple countries, as is the case when a British publisher is granted Commonwealth rights. In this case, these additional countries will be listed in what is known as 'The Schedule'. For translation rights, the territory can be defined by country (a grant of rights to an Italian publisher for the Italian language in the territory of Italy, for example). Or, depending on the deal negotiated, that territory can be widened geographically while still restricted by language (for instance, a grant of rights to a Spanish publisher in the territories of Spain and Latin America; or the territories of Spain, and North America where Spanish is widely spoken. Or the territory could be expanded to 'World' for that language. If Italian and Spanish rights were granted with a territory of 'World', there is the potential for an Australian based reader to buy an edition of the Spanish language work from Sydney.

³ For a discussion about industry initiatives to improve the quality of template contracts between authors and agents, and authors and publishers, see the case study interview with Olivia Lanchester, CEO, Australian Society of Authors and Juliet Rogers.

Literature Review

International connections: Australian authors, publishers and readers since the colonial period

Since colonial times Australians have been keenly interested in reading books from overseas countries (initially the UK), and Australian writers have sought to have their work published overseas. Webby (2009) observes that:

Books, along with much else, had been written in Australia from 1788, with officers of the marines Watkin Tench and David Collins competing to see who would be first to get his account of the early settlement to London for publication. While there remained demand in Britain for non-fictional and, later, fictional works about the Australian colonies, London publishers had little interest in collections of Australian poetry... One of the ironies of 19th century Australian literature was that the more obviously Australian a work was, the better chance it had of finding an overseas publisher. So most fiction and non-fiction was published overseas, most poetry and drama in Australia, at the author's expense.

...In order to become a bestselling novelist or successful dramatist, it was necessary to move to London, as a number of Australian-born authors did later in the century. (p. 45)

Australian book history scholars have documented and debated key developments in the Australian book industry, including the early dominance of British book publishers in the Australian market which continued alongside Australian-owned pulp fiction (popular genre fiction) publishing in the period between 1945 to 1969 (Bode, 2014, pp. 62-70). Bode argues that in effect, popular mass market books or "pulp fiction" publishing,⁴ while extremely significant in terms of sales numbers, operated separately and in parallel to the more mainstream book publishing industry.

pulp fiction publishers... actually dominated the local industry from the end of the Second World War until the 1970s, and... arguably provided the lion's share of fiction available in Australia throughout these decades.

...publishing trends suggest that more Australian readers continued to seek popular American (as well as Australian) genres, characters and themes. (2014, p. 102)

In addition to the long history of genre fiction authorship and publishing in Australia, another key development in Australian publishing history was the growth in "middlebrow" publishing (that is, a much-disputed middle ground between literary publishing and genre fiction) and associated developments from the late 1950s which strengthened the Australian book industry and Australia's literary culture.

In the decade from the 1950s, local publishing of Australian books expanded, gradually at first, and then rapidly as local branches of British firms developed Australian lists. ... By the mid-1970s Australian literature was defined through a set of relatively autonomous institutional sites in

⁴ Bode (2014, p. 64) notes that "From 1945-1969, most Australian novels were published by... pulp fiction publishers. As Toni Johnson-Woods notes, pulp fiction 'correctly refers to all-fiction magazines...printed on wood-pulp paper. However, over time, the term "pulp" has become shorthand for cheap fiction', especially mass-produced, formula-driven paperback novels." The author goes on to give examples of westerns, war novels, crime fiction and romance as the predominant pulp fiction genres during this period (Bode, 2014, p. 65).

universities, publishing, criticism, bookselling and professional associations. The presence of contemporary [Australian non-pulp fiction] books expanded dramatically. (Carter, 2009, p. 360)

Middlebrow publishing is both a serious area of scholarly inquiry and a potentially sensitive one because it involves judgments about taste, social status and literary qualities.⁵ Beth Driscoll (2014) examined the popularity of contemporary feminised models of middlebrow reading and mounts a defence of middlebrow reading preferences, for example she considers book clubs in the context of “over five centuries of degradation of women’s shared reading” (p. 81). Driscoll concludes that whereas middlebrow studies have focused on national reading cultures:

While nationalism can still be a component of middlebrow institutions, there is a growing level of international engagement. The new literary middlebrow increasingly promotes a global cosmopolitanism. (p. 198)

Another significant development in the Australian industry occurred during the 1970s and 1980s with the emergence of independent Australian publishing houses, and offices of multinational publishing houses further developing their local list. Perhaps unlike many authors of the 1950s and 1960s (such as Patrick White), Australian authors such as Peter Carey, David Malouf, Helen Garner, Kate Grenville, Tim Winton and many were published primarily by Australian publishers. This distinction plays a large role in how authors are paid their royalties (a ‘home’ royalty paid by Australian publishers on sales made in Australia and New Zealand; rather than an ‘export’ royalty paid by British publishers on sales made in Australia and New Zealand). There was new and renewed marketing support for these from their local publishers and sales success. The idea of an Australian-based culture of books and writing appealed successfully to policy makers (the Australia Council for the Arts was founded in 1967 and was an important source of literary funding during the 1970s and onwards), and to Australian book buyers and readers. These books by new Australian literary authors both succeeded commercially in the local market while members of the new ‘literary infrastructure’ identified by David Carter including academics and critics engaged with the authors’ writing and ideas.

During this period, genre fiction remained popular too, although there was a steep decline in pulp publishing in the 1970s and 1980s compared to its previous peak popularity. Bode (2014) notes that American-style westerns, war novels and romances were published in large numbers and achieved strong sales in Australia.

Pulp fiction publishing presents a notable counterpoint to descriptions of Australian reading habits that emphasise the desire for books depicting and celebrating Australia... many Australian readers chose American stories (or at least, given the cheapness of these titles, selected their reading material based on price rather than national sentiment). (p. 75)

The growth in the number and sales of Australian-authored literary fiction in the 1970s and 80s eventually prompted a new debate in academic circles. Over time, the increasing presence of local offices of multinational publishers led to discussion about the publication prospects for literary fiction written by Australian authors living here. Mark Davis argued that given the commercial imperatives of multinational publishers in Australia, small independent presses would become increasingly responsible for literary

⁵ For a light-hearted discussion of the sensitivities, see Carter (2020) and the associated reader comments.

publishing. One consequence was that small publishers would have fewer resources to support authors financially and to invest in marketing and promotion for their books (Davis, 2008). However other scholars, including Bode, argued that:

by the 1980s, multinational conglomerates already published 40 per cent of all non-pulp Australian novels.

...The growth in local literary publishers in the 1960s and 1970s occurred despite the prevalence of local pulp fiction and continued as multinational publishers entered the Australian novel field. The ongoing growth in 'independent Australian publishers' in the 1990s and 2000s, including a substantial number of literary presses, suggests that the globalisation of publishing is occurring in the context of—and potentially motivating a parallel shift towards—local, regional and national identifications and communities. (2014, p. 103)

Australian authors' historical success in the USA

In parallel with the development of the Australian book industry from the colonial era, many Australian authors aspired to have their work published overseas, particularly in the UK and the US. This usually involved achieving publication deals with overseas publishers without the systematic intervention or support of Australian publishers or literary agents. David Carter and Roger Osborne give a fascinating account of the success of Australian authors in the US from the 1840s to 1940s, including genre fiction bestselling authors and literary figures such as Patrick White. They demonstrated how, since the 1800s, Australian books have been successful in US markets: they have at times been on bestseller lists and reviewed in prestigious outlets. Carter and Osborne (2018) conclude that:

Across the century or so covered by this book Australian novels were a consistent presence in the American marketplace even while their numbers in any particular year or publishing season were never large. Most of the novelists who would become defining, canonical figures in the articulation of an Australian literary tradition over the course of the twentieth century were published in the United States, their standing as serious authors and in certain cases as major contributors to English fiction acknowledged by American publishers, reviewers and critics... Many Australian authors also participated in and profited from the burgeoning markets on both sides of the Atlantic for light fiction or genre fiction, sometimes with careers as good-selling novelists over several decades, their books reviewed widely and favourably in the weekly book pages. Less predictably, our research has revealed a dense undergrowth of writers with more modest reputations or less obvious claims on Australian literature who were published and found different kinds of success in America. (p. 341)

However, each wave of individual commercial or critical success did not provide a platform for future efforts to sell the works of Australian authors in the US. Rather, between each period of Australian success in the US awareness of Australian books and writing lapsed and the next Australian authors pursuing publication were in effect starting out with no base or support structure to build upon. Carter and Osborne (2018, p. 343) argue that the end of the Traditional Market Agreement in the late 1970s (under which the UK and US book publishers had divided international English language markets between them and Australia had been a colonial market for UK publishers) provided 'the axis of direct negotiations between Australian authors, publishers and agents and the American book trade' resulting in a short-lived 'mini-boom' in American

editions of Australian novels in the 1980s. Carter and Osborne's study ends prior to the developments in the Australian industry outlined in this report.

The rise of self-publishing

Self-publishing dates back to the colonial era in Australia. The dominance of British book publishers in the Australian market from the 1860s to 1950s is well-known, however Australian authors also published novels in serial form in Australian newspapers and their weekly supplements and magazines (and to a lesser extent, in British newspapers). American newspapers and magazines were also important outlets for Australian authors during the 19th and 20th centuries (Carter and Osborne, 2018). Bode (2019, p. 10) argues that in the 19th century the nationality of Australian authors was promoted as an important feature to readers of Australian newspapers, suggesting that newspapers understood this was an important source of appeal. Interestingly, these stories were included as part of a diverse range of international range of popular and literary stories (including from the US, France, Germany, British Commonwealth countries, other European countries, Japan and Russia). For Australian authors, publication of serial fiction could often be a step to publication in print book form.

a novel serialized in an Australian periodical between 1860 and 1889 had a three in ten chance of becoming a book, but only one in four chance again of that occurring via a local publisher. (Bode, 2012, p. 104)

While British publishers were responsible for publishing the majority of Australian-authored novels, Bode (2012) finds that Australian-based companies that carried out book publication as a 'sideline' were active from the 1860s to the end of this century.

these predominantly Melbourne- and Sydney based enterprises were also booksellers, printers, bookbinders, stationers, paper merchants, news agents, distributors, libraries, periodical publishers, and, in most cases, a combination of these.

Rather than an activity in direct competition with major British companies, local book publishing was probably more akin to what today would call self-publication: that is, publication entirely or partly funded by the author. (pp. 106-107)

In many cases it was accepted practice that the authors would contribute a payment for the print costs, and these books could be considered the earliest examples of self-publishing in Australia (Bode, 2012). British publishers dominated the Australian market for books even more strongly from the 1890s.

Although self-publishing is not a new development in Australia or in the history of book publishing, the nature and extent of self-publishing was transformed with the development of digital technologies from the 1990s. Digital publishing enabled the cost-effective production of print books with high production values, and digital communications enable authors to find potential readerships for their work on an international scale. Bode (2014, p. 98) estimates that self-published and partially author-subsidised novels comprised "22 per cent in the 1990s and 25 per cent in the 2000s" of Australian novels published domestically and that these figures may be under-representative. Bode (2014, pp. 100-101) also suggests that these self-publishers operated largely separate from mainstream publishers and retail outlets (unlike in the colonial period).

This separation between traditional publishing and self-publishing changed with the entry of major technology platforms into the self-publishing business, led by Amazon⁶ which is both a major international English-language self-publishing platform and retailer of traditionally published print and ebooks. Driscoll et al. (2018) in a study of genre fiction find that:

The category of self-publishing starts to gain traction between 2010-11 and 2015-16 (increases of 230% for crime, 290% for fantasy, and 1000% for romance), suggesting the degree to which digital technologies inspire expansion. (p. 209)

A 2015 survey of Australian authors found that over a quarter of authors had self-published a print book or an ebook at some point, and nearly one-fifth had self-published a book in the previous year. Genre fiction authors were particularly active, with nearly one-third having self-published in the previous year (Throsby, Zwar, & Longden, 2015b). The survey did not ask about authors' satisfaction with the outcome and there may have been a level of experimentation as part of this activity. However, the entry of platforms such as Amazon and Apple have enabled self-published authors to promote their work directly to readers in ways which have fundamentally transformed the market for books. In particular, Australian romance authors have found international readers through these platforms. A title available via Kindle Unlimited, for example, is available to all English speakers throughout the world.

The status of Indie publishing varies, for example, it is now well-established in some popular fiction genres such as romance but less so in literary fiction publishing (arguably with the exception of poetry).⁷ Traditional publishers have acknowledged monitoring self-publishing platforms to identify authors and their works which gain momentum as potential acquisitions for their lists. New self-publishing or Indie publishing has also paved the way for other models. Sophie Masson, a successful traditionally published author, formed a small children's publisher with colleagues as an experiment and has since published 25 books through Christmas Press. Masson (2019, pp. 68-69) examines the opportunities for crowdfunding as an option for small publishers and finds it should not be a primary business model but can be viable for specific book projects.

Structural changes to the Australian book industry in the twenty-first century

Digital transformation has potentially provided opportunities for Australian genre publishers of all sizes. Kim Wilkins, Beth Driscoll, Lisa Fletcher, and David Carter (authors of a major study on Australian contemporary genre fiction)⁸ argue that 'Genre fiction plays a central role as a driver of change in the post-digital publishing industry' and that change has been driven by "small, innovative Australian genre publishers as well as multinational publishers".

Accounts of a starkly divided industry are beginning to lose some of their explanatory power, as digital technologies increase the capacity and reach of medium, small and self publishers. Digital technology reduces the costs involved in both print and ebook

⁶ For an overview of developments see Matulionyte et al. (2017).

⁷ Many self-published authors use the term "Indie publishing" to refer to self-publishing and that is the definition of Indie publishing in this report. In studies of book publishers Indie publishing can refer to independent publishing, but the term is not used in that context here.

⁸ 'Genre Worlds: Australian Popular Fiction in the 21st Century (2016-2019)', funded by the Australian Research Council.

production and enables new infrastructure for distribution such as Amazon's Kindle Direct. These are affordances that all sectors of publishing capitalise on, but which have been particularly transformative for small players. (Driscoll et al., 2018, p. 204)

David Carter and Millicent Weber (2019) survey Australian fiction publishing from 2013 to 2017. They find that three multinational publishers—HarperCollins (including during this period romances published by Harlequin), Penguin Random House and Pan Macmillan—are responsible for approximately 30% of fiction published in 2013-2017, followed by Allen and Unwin and then a number of smaller multinational and medium independent publishers followed by a “long tail” of small publishers. Carter and Weber (2019) observe similarities with fiction publishing in the UK and US but also key differences in Australia:

multinationals dominate, but that there is one Australian independent in the top four, two in the top six, and five altogether in the top ten. This suggests firstly, that being medium sized is more sustainable in Australia's medium-sized market than in the larger overseas markets, but also secondly, that what counts as medium-sized in Australia is comparatively small. (p. 350)

Carter and Weber (2019) observe patterns of fiction publishing as follows:

local independents are comparatively far more visible in literary and crime fiction publishing than in romance, thriller/adventure and fantasy. Medium-sized firms are substantially represented, but the multinationals dominate in both literary and genre fiction,

With the exception of crime, where publishing patterns more closely resemble those of mainstream fiction despite the genre's taste for seriality, the medium-sized publishers are much less engaged with genre fiction. For romance in particular, but also fantasy and science fiction, this is due in part to the typical pattern of larger print-runs and relatively rapid production of successive titles rather than the title-by-title strategies common elsewhere. However, the balance is beginning to shift with the multiplication of specialist and niche lists among small to medium-sized publishers.

Again, the advantages of size are evident: large publishers can act small where it matters, for example in cultivating a literary list, and big where that matters, say in sustaining a romance list. Medium-sized publishers can play across the various sectors, maintaining a literary list while also investing in selected genres or a few genre titles, especially when these are closest to mainstream or literary fiction (as with Text's crime list). A small publisher, by contrast, has little option but to keep it small, to specialise or invest in literary prestige. (pp. 351-352)

Traditional book publishers of all sizes are dealing with constraints imposed by international digital platforms such as Amazon, Facebook, Apple, Google and others. Recent scholarly analysis of the contemporary Australian publishing industry has focussed less on implied models of iterative growth and progression than on the radically different nature of the industry. Discussion has included the nature of post-digital publishing and the opportunities for Australian authors and publishers of a range of genres.⁹ Mark Davis (2020) has examined the “reorganisation of cultural industries around digital platform logics” by organisations including Google, Amazon, Facebook, Apple and Microsoft, arguing that that the platforms “don't somehow ‘replace’ the human, but intersect with human factors in a hybrid post-digital environment where digital and human practices intermingle”. Claire Squires (2017) interviewed UK

⁹ See, for example, Stinson (2016a), Davis (2017) and Weber & Dane (2020).

commissioning editors to investigate whether their decision-making processes had changed as a result of access to big data, and found that editors strongly emphasised the role of personal judgement and experience, albeit nuanced to the requirements and operations of their publishing company and marketing opportunities. Squires concluded with a call to:

simultaneously recognise the faults inherent in human gatekeeping (including its repeated exclusion of particular demographics), but also reinsert a critical understanding of where data-driven, algorithmic culture might be taking publishing, and which aspects of traditional [commissioning] practice we might want to retain along the way. (p. 36)

Authors' income

Another relevant area of scholarly work examines the income of Australian authors. A 2015 national survey of Australian authors found that the average income of Australian authors from their creative practice was \$12,900 in the previous year. The majority of authors supplemented their income from other sources including other paid work, their partner's income, and/or grants and prizes. Even when these additional income sources were taken into account, nearly two-thirds of trade authors earned less than the average income for this period despite authors having higher levels of formal education than the general population, and a broad willingness to engage in innovation and marketing outreach to increase the opportunities for their books to find readers. The survey also found that nearly one-fifth of authors earned over \$101,000 (including all sources of income) with genre fiction and education authors the only ones to report earnings of over \$200,000 from their creative practice alone (Throsby, Zwar, & Longden, 2015c).

A recent investigation by Brigid Magner and Tracey O'Shaughnessy (2020) examined the earnings of midlist authors:

that is the 'middle of the list'. It does not mean that the writing is not as 'good' as a bestseller, only that it does not sell as well. It's a space that is full of a wide range of different titles. Midlist titles are those that sit in the middle of the range of advances and sales on a publisher's list. (pp. 10-11)

Magner and O'Shaughnessy (2020) found that earnings for midlist authors in 2005-2018 (a period roughly overlapping with the timeframe of this study) have decreased. The Australian book industry has not recovered from the collapse of the REDGroup Retail in 2011, with the retail discounting on recommended retail prices highly prevalent (leading to higher sales volumes but lower average selling prices). The authors also find that, "one of the most significant consequences of bestseller culture is the widening of the income gap between bestselling authors and others" (Magner & O'Shaughnessy, 2020, p. 21). Simone Murray (2019) observes that:

industry-wide belt-tightening in the face of digital uncertainties has seen advances to authors (upfront payments offset against future income) substantially reduced for all except star, front-list performers ... Such financial realities have contributed to a marked polarization of author-ship into authorial celebrities at one end who may be marketed as virtual brand-names, and the mass of other authors, formerly denoted 'midlist', who struggle to maintain publisher support and must fight among themselves for editorial and marketing attention. (pp. 48-49)

The decline in Australian authors' incomes is consistent with findings in the UK, Europe, Canada and the US.¹⁰

Economics of book publishing

This project also ties in with the existing literature examining the economics of book publishing. Books, along with other types of cultural goods, exhibit key characteristics that distinguish them from other goods and services in the economy (Crosby, 2019; Crosby & Throsby, 2019). Of relevance is the fundamental concept of uncertain demand (that is to say, nobody knows whether a new title will be a success) that underpins all publishing contracts (Caves, 2000). Book publishing is further complicated by non-convexities in production costs (each title typically has large fixed costs and small marginal costs) and the complex nature of international trade in the industry (Canoy, van der Ploeg, & van Ours, 2006).

As alluded to above, the book publishing industry has also traditionally been coined a “blockbuster” industry (Anderson, 2007). In such industries, most sales have traditionally been concentrated among a small number of titles. Over recent years, digitisation in the book industry has greatly reduced the cost of bringing new titles onto the market and facilitated new lower-cost models of promotion and dissemination (Waldfoegel, 2017). These changes, in particular their impact on product quality (both in terms of content and production values) and discoverability, further serve to exacerbate the issues of uncertain demand introduced earlier. Given the unique nature of the quantitative data on rights sales collected as part of this research project, our results can be used to investigate product concentration, at both the title and author level, and examine whether the “blockbuster” model dominates the industry.

Empirical data on rights sales of Australian-authored books

To date, perhaps because rights sales data has not been available for scholarly analysis, there has been limited academic scholarship on contemporary rights sales. Airlie Lawson (2019a) examined the international rights sales of a selected set of Australian novels from 2000 to 2015 and the factors which influenced their sales. Lawson drew on her research to write a series of articles for *Books+Publishing* about the use of data to challenge or uphold assumptions about factors relevant to rights sales success. (Lawson, 2019b).

Other discussions of Australia's track record in rights sales have come about as a result of government inquiries, selected academic initiatives and initiatives by industry associations. One government-sponsored inquiry found that while ‘the growth of Australian book exports’ between 1991 and 2011 had been publicly recognised as ‘a major success story’ (BISG, 2011, p. 59), the export of intellectual property as a trade had not been effectively measured or studied. Monitoring the rights trade has not been a priority for the industry to date. A related report noted the value of rights sales data but labelled collecting the data systematically—at that stage—as ‘discretionary’ (BICC, 2013, p. 85).

Prior publicly available revenue figures to those in this report which cover the period of this study (2008-2018) come from different sources and have different methodologies

¹⁰ See: The Writers' Union of Canada (2015), European Commission (2016), Kretschmer et al. (2019) and The Authors Guild (2019).

with regards to the inclusion of advances, royalties and direct export income. A 2009 survey, drawing on 2007-8 figures, for example, modelled the international rights revenue for ‘large publishers’ at \$610,000 (Lee, Davis, & Thompson, 2009, p. 34); while an industry estimate based on Australian Publishers Association (APA) figures put revenue for 2010 at ‘between \$5 million and \$10 million’ (BISG, 2011, p. 17). A survey of participants in the Australia Council-funded international networking program, the Visiting International Publishers (VIPs) program, revealed sales of ‘over \$2 million’ in 2011-2012 (BICC, 2013, p. 175) and between 2011-2015, sales of \$4.1 million (Australia Council for the Arts, 2018).

The publisher survey figures did not include literary agents’ revenue, and while it has been claimed that ‘authors deal directly with their publisher’ (PwC, 2011, p. 5), it has also been argued that agents are more likely to be responsible for selling rights (Lee, Davis, & Thompson, 2009, p. 35). The respondents to the VIP survey included agents and it was estimated sales generated by the program represented just 15 percent of respondents’ rights sales (Australia Council for the Arts, 2018): this survey too, only represents a portion of the industry. By this measure, industry-wide rights sales were likely to have been far higher than any single report during the period suggests.

The value of the trade can also be measured in terms of the volume of rights sales. The most extensive source of edition information during the period was the country’s largest literature database, *AustLit*. It is not designed to provide transactional information such as terms for rights sales; it is also not comprehensive with ‘coverage ... stronger in some areas than in others’ (AustLit, n.d.). While there is no general non-fiction equivalent of *AustLit*, the magazine *Books+Publishing* had included non-fiction and children’s rights sales coverage, however this information has not been aggregated.

Using *Austlit* to examine trends in international editions of Australian literature has been attempted and difficulties noted (McLean & Poland, 2010, p. 31), and scholars have examined ways devised to supplement the existing records. *Windows on Australia*—a study of Australian translations in five languages—described searching national libraries records, Wikipedia, blogs and employing bi-lingual research assistants (Gerber & Wilson, 2011, pp. 4-5); the data used in *Conditions of Access*—a global study of the Australian rights trade for novels—was formed by combining *AustLit* edition information with publisher-supplied contract records and aggregated deal announcements, manually sourced (Lawson, 2019a, p. 4-104). The difficulty of obtaining rights data means that it has not been possible to make a comparative, longitudinal assessment across languages, countries and categories and to understand the value of rights in terms of successful cultural exchange.

Overall, while the literature does not provide a definitive account of the value of the rights trade as this activity gained momentum, it suggests that rights have been of more commercial value than is evident in individual accounts. It also makes clear the importance of using multiple indicators to measure success on the international stage.

The role of literary awards and prizes in relation to rights sales

Academics have debated the role of literary prizes in Australia in shaping the prestige associated with types of writing and authors. Beth Driscoll (2014) examines the way that literary prizes seek to combine the prestige of literary culture and the commercial aims of promoting book sales and reading. Alexandra Dane (2020a) argues that eligibility criteria and entry fees for major literary awards “help to preserve a top-down

approach to circulation of literary texts” despite organisers’ aims to increase the diversity of books entered. Emmett Stinson considers the extent to which books published by small independent publishers are shortlisted and winners of major literary awards including the Miles Franklin Award, the Prime Minister’s Literary Award for Fiction and the Stella Prize (Stinson, 2016b; 2019a). Ivor Indyk (2015) has criticised the award choices made by panels drawn from “the different sectors of the reading community—writers, librarians, retired politicians with cultural leanings, actors, singers, television presenters”:

It’s a truth well understood, though perhaps not much regarded these days, that literary quality stands in an often hostile relation to popular appeal. Nevertheless, it takes strong judges to choose books that they know people will have to make an effort to read. They can hear the whine of popular disappointment insinuating itself into their brains—‘It’s difficult to read...’ ‘I didn’t like the characters...’ ‘There wasn’t much of a story...’. (Indyk, 2015)

The scholarly debate, however, acknowledges that literary prizes remain important in Australia (Stinson, 2019b). A significant recent success is the Stella Prize, established in 2012 to recognise Australian women’s books and writing, following research by Melinda Harvey and Julieanne Lamond (2016) which examined the number of book reviews by male and female authors in newspapers and literary journals in 2011, and the gender of reviewers. Harvey and Lamond found patterns of longer reviews of books by male authors and a greater proportion of longer reviews assigned to male reviewers. The Stella Count was established to monitor the annual count of book reviewers and has been remarkably successful in increasing the proportion of reviews assigned to books by female authors, and by female reviewers.¹¹ Unfortunately, this positive development has occurred in a period of decreasing coverage of books and writing by major newspapers (Harvey & Lamond, 2019). Building on this momentum, leading figures in the Australian publishing industry established the Stella Prize, to redress the literary awards to female authors.

In her doctoral thesis, Lawson examines whether winning one of Australia’s leading literary prizes such as the Miles Franklin, Prime Minister’s Literary Award or the Stella Prize leads to increased international rights sales. Lawson’s examination of awards and rights sales leads her to conclude that in many cases the rights to award-winning titles were already sold to key territories before the books won the award. Lawson’s doctoral thesis (drawing on a smaller and different data set than the current report) found that:

while prizes in general do have an impact on rights sales for all categories, they are particularly important for literary fiction, as it is not just about a few novels, but many. This is significant in an environment where the cost of entering awards has come under scrutiny, and some smaller publishers have suggested they won’t enter: potentially not only is the novel in question missing out on an award—but also on rights sales. (Lawson, 2019b)

Findings in this report about the role of prizes in rights sales are discussed further on.

Policy interventions and the mechanics of the rights trade

¹¹ The results of the 2018 Stella Count suggest that the act of counting is actively shifting the gender balance of literary journalism in Australia (Stella, 2019).

Given the lack of aggregate rights sales data it has been difficult to establish the role that policy interventions (changes to copyright law and funding initiatives) have played in facilitating international trade, and the effectiveness of trading models and practices.

The partial lifting of Parallel Importation Restrictions (PIRs) in 1991 has been widely credited with enabling the growth of the Australian publishing industry: this includes rights sales (Lee, 2004, p. 157). At the time publishers claimed that fully lifting them—“opening” the market—would inhibit the trade (Lee, Davis, & Thompson, 2009, pp. 128-129). The industry has argued that territorial copyright, enabled by PIRs, is “essential if full export culture is to be developed” (BICC, 2013, p. 32). In the case of Australia, territorial copyright is normally associated with English language rights, but it has also been argued that English language sales influence translation rights sales (a rights sale to the major markets of North America and the United Kingdom are seen as a strong precursor to translation rights sales. Without a sale into these markets, the translation markets can be slower to perceive the value in a title), so “opening the market” would negatively impact the whole rights trade (Lawson, 2019a, p. 368).

The Visiting International Publishers (VIPs) program, which generated “over \$2 million” in rights sales in 2011-2012, did so for a total investment of \$100,000 per year (BICC, 2013, p. 175). Two of the Australia Council’s other long-running rights trade funding initiatives have also generated sales and enabled cultural exchange. Over three years, recipients of Booked grants—grants designed to increase knowledge of, and trade with, international markets—reported \$7.3 million in rights sales (BICC, 2013, p. 175); between 2008-2015, 120 translation grants were awarded, facilitating the publication of Australian books in 38 territories.¹² Without industry-wide, longitudinal rights data, the contribution of these initiatives cannot be contextualised, so their full impact has not been assessed. Austrade too, can be seen to have contributed to enabling the rights trade to increase with 67 export grants to publishers between 2008—2011 (BISG, 2011, p. 59), but without a larger dataset it is, again, difficult to understand the influence of these grants.

With the exception of the VIP program, these funding programs have also been limited: to “quality” works in the case of the Australia Council for the Arts programs, and certain publishers (depending on their size) in the case of Austrade export grants due to the contribution “threshold” (BISG, 2011, p. 60), limiting their usefulness to the wider industry. Broader initiatives, jointly supported by the Australia Council, Austrade and the APA, include trade delegations to markets such as China, Taiwan, Korea and India (BISG, 2011, p. 28), based on export market growth initiatives that target growing economies (PwC, 2011, p. 88). The Taiwan initiative has been described as successful, paving the way for the Korean delegation (BICC, 2013, p. 178), yet a recent study of the book market in the UK showed a reduction in the correlation between economic activity in the country and book sales (Phillips, 2017), while a comparison of national export figures and international rights sales revealed significant differences in trends over time (Lawson, 2019a, pp. 191-192).

Lawson’s analysis of rights transactions for adult novels demonstrated that the way rights are sold can be seen to be determined by the country’s unique geographic, cultural, historic and economic co-ordinates (Lawson, 2019a); VIPs survey respondents reported intermediaries (such as co-agents or literary scouts) were involved in 60 percent of sales generated by the program over a five year period (Australia Council for

¹² Data supplied to Airlie Lawson by the Australia Council.

the Arts, 2018); a study of independent publishers and the US market demonstrated the importance of networks (Henningsgaard, 2017); and over a fifteen year period, the magazine *Books+Publishing*'s annual survey of Australian rights sellers, 'The Rights Stuff' consistently ranked international book fairs high on their top ten trading "conduits". Case studies have focused on individual authors and works, supplementing the quantitative information, which revealed the way in which Australian publishers such as Text Publishing have been highly strategic in their approach to gaining rights success (BICC, 2013, p. 24), authors such as Matthew Reilly have chosen international representation to build on an existing global audience (BICC, 2013, p. 33), and the influence of literary scouts (BICC, 2013, p. 157).

Case studies have also shown how publishers have adapted their business models to changing market conditions (Zwar, 2016). More widely, studies have shown it to be a common practice to cede some Commonwealth territories to British publishers as part of UK rights sales (Lawson, 2019a, p. 138), while respondents to 'The Rights Stuff' surveys have revealed conducting ebook-only deals in some translation markets (Hanke & Wrathall, 2016, p. 19). The literature suggests that factors often attributed to influencing success domestically have a different value internationally and, moreover, that works that achieve domestic success are not necessarily more likely to achieve global success, or even a single rights deal in a single territory (Lawson, 2019a, p. 270). There are cases of titles that have not achieved success in their home market (either through sales or awards), that can achieve greater success in rights deals. Perhaps most significantly, the literature shows a pattern of a rapid contraction in the timeframe for announcements of deals relating to individual books over the period, accompanied by an increase in the number of territories into which rights are sold (Lawson, 2019a, pp. 356-357), suggesting the impact of new technologies on the trade.

Drawing on diverse scholarship in Australian publishing studies and literary studies

The contemporary scholarly approaches in this literature review can be understood in the context of the extensive changes in Australia's book industry. Aspects of book publishing which were once viewed as separate are now intimately connected: for example, self-published books and traditionally published books vie directly in online retail sites for readers, commissioning editors bring personal experience and judgement to decision-making about acquisitions "augmented" by big datasets, book sales are influenced by reader word of mouth and algorithms in online search engines. Literary agents may represent both authors who are traditionally published and others who have chosen to go Indie (self-publishing). Authors have adopted the term 'hybrid' to refer to practitioners who take up both Indie publishing and traditional publishing.

The key developments that created the conditions for the rights sales summarised in this report can be located stemming from developments in the late 1980s and early 1990s to the present: the development and growth of platform publishing, ebook technologies and new models of self-publishing; the rise of the internet and social media; the expansion by multinational publishers into some areas of popular fiction (and some subsequent scaling back of investment) (Driscoll et al., 2018); the expansion of the blockbuster publishing model and also opportunities for niche publishing; the increased role for authors to promote their work; expanded scope for direct interaction by authors and publishers with readers; and, between readers themselves on an unprecedented international scale.

Approaches to scholarship aim to address these changes, for example Carter and Weber propose that publishing studies address a broader notion of “Australian writing... “not least for the crucial task of bridging gaps between industry, policy and culture”. This does not diminish the importance of literary writing in a more restricted sense, but is recognition that it is part of a complex “arts ecology” (Carter & Weber, 2019, p. 355). Kim Wilkins (2019, p. 121) has argued that popular fiction can be understood as a site of experimentation and innovation, even though “This notion of literature that experiments outside the mainstream does not map easily onto the usual view of genre fiction”. Likewise, although Australian literary scholars retain a national focus this is combined with local and transnational approaches to generate nuanced insights. Robert Dixon (2004) argued that Australian literary studies has been interested in transnational themes since the 1940s, and in an influential article he called for a greater emphasis on transdisciplinary and transnational “boundary work”. It is not possible to list the broad body of work with which scholars have responded but he returned to these questions about the appropriate “scale” for Australian literary studies recently and concluded by endorsing “the call for a ‘scale-sensitive’ analysis, in which all scales are in play, and in which there is movement above, below and around the national level” (Dixon, 2015).

This movement around and beyond the national level has recently been examined in relation to popular fiction. One notable finding in this report is the contemporary success of Australian romance, crime, and other genre writers internationally. Kim Wilkins, Beth Driscoll, Lisa Fletcher (2018, p. 1) explain that “Australian popular fiction is a success story hidden in plain view”. Wilkins, Driscoll and Fletcher examine the international settings of these contemporary works and find that many successful Australian popular fiction writers have both a sense of Australian identity and membership of a global genre community. They find “little evidence that writers feel they must choose between a national and international outlook” (Wilkins, Driscoll, & Fletcher, 2018, p. 4). The scholars identify:

a key aspect of Australian popular fiction: that the objective of the work is rarely to depict Australianness, but to fulfil the expectations of genre readers. Rather than seeing themselves as national writers, our interviewees see themselves as genre writers. They have often grown up reading in their genres and learning which settings provide the most reading pleasure, and trained as writers within genre communities that span national boundaries. (p. 8)

As such, the books discussed further on in this report include a very broad range of Australian-authored works, which connect to international communities of writers and readers and a diverse range of Australian publishing studies and literary scholarship.

Further, the notion of an author continues to evolve from its influential Romantic origins. Simone Murray (2019) summarises the changes in relation to the contemporary understanding of book authors:

Digital technologies present fundamental challenges to traditional conceptions and practices of authorship: digital texts are typically open to ‘readerly’ manipulation, and digital publishing has allowed more democratic forms of authorship such as self-publishing and crowd-funded publishing. Paradoxically, the digital domain has triggered a further elevation of the celebrity author figure, with author-maintained social media accounts providing readers with daily, or even real-time, communion with favourite authors. Authorship thus stands at a fascinating point: at once sacralized more than ever and yet, in theory at least, never more accessible to a mass public. (p. 1)

There is an additional area of scholarship relevant to the report's findings, which relates to the role of women in Australia's book publishing industry.¹³ The survey findings and case studies indicate that the vast majority of contemporary rights sellers in Australia—be they employees of publishing houses, literary agents or authors themselves—are women, and their success builds on the contributions of pioneering literary agents and publishers, many (but not all) of whom were women. Initially, this was not commented upon in interviews for the case studies, however women's names predominated on invitation lists for briefing seminars about the research projects, in discussions about pioneering figures in Australian rights sales (while noting that there also important male pioneers), and in case study interviews where interviewees referred to rights sales colleagues in other agencies and publishing houses.

Interestingly, interviews for the case studies and informal conversations during the period of research produced some intriguing insights. While this report discusses the role of rights sellers as agents, and within publishing houses, within houses the location in the company structure and job definition vary from publisher to publisher. In some publishing houses, rights sellers are included in editorial meetings about potential acquisitions and their insights into a book's international rights sales prospects are taken into account. These rights sellers were more likely to perceive their role as part of the core business of the publisher (to acquire, develop, launch and market books). In other publishing houses, rights sellers were not part of editorial meetings and after the decision was taken to acquire a title, they then took on responsibility for investigating international rights opportunities. In the latter case, some rights sellers perceived that their role and contribution is regarded by management as a step removed from the core business of the publishing. Because much of their work involves online research and communication and overseas travel, there was the potential for their efforts to be less visible within other parts of the company, or in the book industry more broadly.

The role of women in international rights sales in the Australian book industry is a largely under-studied area and it is hoped that this report may lead to further scholarly interest in the role that women have played in taking Australian books to international markets and territories.

¹³ Broader scholarship about the contributions of women to Australian book publishing is too numerous to list here but examples include the previously mentioned scholarship on the Stella Count by Melinda Harvey and Julieanne Lamond (2016); Beth Driscoll's examination of middlebrow books and readerships (2014); Katherine Bode's work on serialised fiction in newspapers in the colonial era and pulp fiction publishing (2012); Simone Murray's work on feminist publishing (2004; 2008). Louise Poland has published studies of key female publishers and editors (see, for example, Poland, 2003a; 2003b and Jordan & Poland, 2013). Recently, Alexandra Dane (2020b) examined structural and institutional mechanisms which influence the prospects of books authored by women. Parnell, Dane & Weber (2020) exemplified the contribution of publicists, a female dominated profession in book publishing. However, to date there has been little systematic examination of the role of women in international rights sales.

Methodology

Choice of research method

This project was developed in consultation with a wide range of participants in the industry, including rights sellers at publishing houses, literary agents, author representatives and senior figures at the Australia Council for the Arts and the Copyright Agency. The research approach involved a series of stages: initial meetings with senior industry figures and funders to assist in formulating the issues to be covered in the project; design of a draft survey questionnaire and consultation with agents, publishers, and author representatives to refine the questionnaire, and the development of case studies. These stages are outlined in more detail below.

An informal working group was established by Drs Crosby and Zwar with the following members:

- Wenona Byrne, Head of Literature, Australia Council for the Arts
- Nicola Evans, Head, Cultural Fund and Reading Australia, Copyright Agency
- Nerrilee Weir, Senior Rights Manager, Penguin Random House and former Chair, Arts Practice, Audience and Market Development of the Australia Council for the Arts
- Rebecca Mostyn, Director, Research and Knowledge Management, Australia Council for the Arts
- Chris Pope, Research Program Manager, Research and Knowledge Management, Australia Council for the Arts
- Karen Le Roy, International Market Adviser - North America, Australia Council for the Arts
- Juliet Rogers, former CEO, Australian Society of Authors

The group met approximately two to three times per year, initially in person and then using Microsoft Teams, to provide feedback on the project to the Macquarie University researchers and advise on the project's design and implementation.

During these initial project development meetings, it was decided that the survey would be programmed in-house using Qualtrics survey software and administered over the internet. While a variety of other options for survey implementation and distribution exist (such as face-to-face interviews, computer-aided telephone interviewing, paper-based surveys) the decision to proceed with an online survey was made for several reasons. Online surveys decrease the need for manual data entry, lowering costs and reducing the possibility of data entry errors during transcription. Crucially, online survey implementation also gives respondents increased flexibility and convenience. Only relevant questions are shown, and respondents can complete the questionnaire at a pace that suits them. Given that respondents were being asked to contribute information and data from a variety of different sources for the survey questionnaire, this last point was a particularly important consideration.

Population and sample

The book publishing industry has traditionally been divided between trade (consumer) publishing and educational (primary, secondary and tertiary) publishing, with the following sub-categories:

-
- Trade
 - General: adult fiction
 - General: adult non-fiction
 - Children's
 - Includes some output from scholarly presses
 - Education
 - Primary schools
 - Secondary schools
 - Tertiary
 - Vocational and continuing education
 - Includes some output from scholarly presses

Scholarly presses, which are mostly attached to universities, may position themselves in a combination of trade and education markets, depending on their lists and their publishing strategies. This research focuses on trade publishing only.

A 2016 survey of Australian book publishers conducted by Macquarie University researchers found that although there are a large number of organisations which publish books as part of their broader activities (numbered in the thousands), the number of specialist book publishers is much smaller (Throsby, Zwar, & Morgan, 2018). The 2016 survey provided an estimate of 181 specialist book publishers which are members of the Australian Publishers Association (APA) and/or the Small Press Network (SPN). This figure does not include small education publishers (these are often initiatives founded by former teachers or other educators), however the 2016 study and this present research focus on trade publishing only so the exclusion of education publishers from the estimated population does not affect the findings.

There are 16 literary agencies which are members of the Australian Literary Agents' Association. Each of these agencies varies in size from independent operators to larger organisations employing multiple literary agents.

The 2015 survey of Australian book authors found that nearly one-fifth of authors had self-published (also known as Indie publishing) in some form in the previous year (Throsby, Zwar, & Longden, 2015b, p. 5). The survey found that established genre authors are most likely to experience a financial benefit from Indie publishing. This was a period when some authors who were also traditionally published were experimenting with Indie publishing and the figure is likely to have changed (but it is not clear if the proportion and genre of authors benefitting from self-publishing has gone up or down). The number of Australian authors who are Indie publishing and successfully selling their work overseas is not known and as will be discussed further on, income from Indie authors' overseas sales is likely to be under-represented in this study's findings.

Not all of the 181 specialist book publishers identified in the 2016 survey conducted by Macquarie University had rights sales to report over the sample period. Therefore, the working group established for this project prepared a longlist of publishers and agents who are known within the Australian book industry to have had success in international rights of Australian-authored books. The longlist contained 72 agents and publishers. The majority of Australia's rights sales deals were known informally within the industry to have been achieved by a relatively small number of large and medium-sized

publishers and well-known literary agents. These publishers and agents were the priority respondents for the survey.

Given the relatively small number of agents and publishers on our population longlist, we adopted an “opt-in” approach to sampling (as opposed to a random sampling approach). This involved an email invite (which included a link to the online survey) being sent to each of the agents and publishers known to have had rights sales deal by the Australia Council on behalf of the research team. A further follow-up email was sent four weeks after the initial invite to encourage participation from those who had not yet registered. The survey was also advertised by the two major publishers’ organisations, the APA and the SPN to encourage participation by any eligible respondents who may have been omitted from the longlist.

Survey design

This was the first time a scholarly survey of Australian agents and rights sellers within publishing houses had been conducted. Based on previous experience of research into the Australian book industry about authors and publishers, the Macquarie University researchers placed a strong emphasis on consultation and feedback over a long period of time to refine the questionnaire. The goal was that the research findings would meet the needs of the Australian book industry and funding organisations and that it would have a high participation rate to address scholarly research questions.

Dr Crosby and Dr Zwar met several times with Nerrilee Weir, Senior Rights Manager at Penguin Random House to take notes about the areas to be covered in the survey, following which the researchers prepared a draft questionnaire. Feedback on the draft was obtained from the funding organisations, the Australia Council for the Arts and the Copyright Agency, as these organisations both have expertise in survey design. Wenona Byrne, Head of Literature at the Australia Council for the Arts, also provided feedback drawing on her experience as a former rights sales manager at Allen and Unwin, Australia’s largest independent publisher.

The Australia Council hosted two introductory events for agents, rights sellers and publishers so they could be briefed about the research and to provide feedback about the project design. An event in Sydney was on 15 March 2019 and in Melbourne on 29 March 2019. Dr Crosby and Dr Zwar presented to approximately 20-25 people in each session, comprising agents, rights sellers, large and small publishers and representatives of industry associations. The mix of attendees across this range was roughly similar at each event apart from a higher proportion of independents within the publisher numbers at the Melbourne event. Dr Crosby also hosted an online event on 1 April 2019 with 20 participants. At each event, he presented the draft survey questionnaire, distributed hard copies and emailed links to the draft survey online for trialling and feedback. Dr Crosby had several follow-up conversations with leading rights sellers and agents, including the President of the Australian Literary Agents’ Association and the CEO of the Australian Society of Authors.

Through discussion with members of the industry, several changes were agreed to reduce the time involved for respondents in filling out the survey and to satisfy the need for confidentiality. A proposal to include royalties earned from international rights sales was removed because of the extensive time it would take many respondents to compile this information covering a ten-year timeframe. Therefore, all financial data is comprised of the advance component of rights deals only. Strong sales in a market can

result in royalty earnings once that advance has earned out. For example, an initial advance of EUR3,000 from Germany can lead to royalties of more than that amount.

A memorandum of understanding was prepared which would guarantee that only Dr Crosby would have access to the survey responses to satisfy concerns about confidentiality. Dr Crosby undertook all data cleaning and analysis personally rather than hiring a research assistant to respect industry concerns. Dr Zwar designed an additional component for agents in the survey questionnaire, to ask their feedback about changes in the industry and the impact on their profession. This addition was intended to complement earlier surveys of authors and book publishers about the impact of changes in the industry on their professional practice and their expectations for the industry's future.

Questionnaire structure

The structure of the survey questionnaire is as follows:

- Publisher / Agent / Other Organisation Details
- Agents: professional practices and responses to industry changes
- Rights Sales Information (for the period 2008-2018)
- Co-edition Information (for the period 2008-2018)
- Direct Export Information (for 2018 only)
- Strengthening the Capacity to Sell International Rights
- Changes in rights sales from 2008-2018
- Optional Questions (scope to nominate a case study)

A copy of the survey questionnaire can be found in the Appendix.

The survey was designed to have two components. The first was a series of general questions. The second component was a detailed listing of rights deals, co-editions and direct exports. Rather than requiring the respondents to fill out these details over ten years (and potentially hundreds of deals) as a series of responses to survey questions, the researchers provided a template in advance which showed all the categories of information which would be requested. Respondents could prepare this data ahead of time and upload the files as an attachment to the survey questionnaire. An excerpt of the deals template can also be found in the Appendix.

To reduce the time required on the part of survey respondents, flexibility was offered regarding the format of the respondents' data about rights sales and co-editions (the data could be uploaded as Excel spreadsheets, PDFs or output from a rights management system, for example). Dr Crosby then undertook to adapt the data provided to a common format for deidentification and analysis.

Implementation

The researchers designed the online survey questionnaire so that respondents could register their intention to respond weeks or months in advance of filling out the survey. This enabled the researchers to gauge the level of industry support for the project. The launch of the survey in September 2019 was accompanied by publicity inviting agents, publishers and authors to register. The number of initial registrations was strong and included leading publishers and agents, indicating that there was scope for a

generalisable sample. Dr Crosby conducted various phone, email and in-person consultations with approximately 15 potential respondents who wished to participate but who were unsure how their record-keeping would serve the data requirements of the research project, or who required further information regarding their potential participation in the research project.

The closing date was initially advertised as December 2019 and then extended to March 2020 based on feedback from agents and publishers who advised that they could complete the survey but needed more time. The COVID-19 pandemic introduced an unforeseen complication to the implementation of the survey. First, lockdowns in Australia resulted in the closure of bookstores, the cancellation of writers festivals, speaking appearances by authors in schools, libraries and elsewhere and the postponement of book launches. The book industry was experiencing major financial uncertainty, although the exact dimensions of the losses were not yet known. Agents found themselves dealing with authors who were uncertain about their income and with major international book fairs such as the London and Bologna book fairs were cancelled early in 2020. Publishing staff were also working from home instead of at their place of employment. All these factors meant that agents and publishers who had expressed strong support for this research project but had not yet filled out the survey questionnaire communicated to Dr Crosby that it might not be feasible for them to do so due to the other pressures they were dealing with.

Due to the ability for respondents to register their intention to complete the survey, the researchers had a list of who intended to participate in the research prior to the pandemic but had been unable to proceed. Dr Crosby prepared an initial analysis of the responses to date which found that the advances earned from international rights sales were larger than had previously been realised, even without data from some major publishers and agents. This is where industry support for this project became vital in seeing it through to the next stages. Drs Crosby and Zwar prepared a confidential brief on the findings to date, including the initial results from the survey and quotes from the case studies. This brief was used in discussions by senior industry figures to encourage colleagues who had not yet completed the survey to do so, despite the considerable pressures caused by the COVID-19 pandemic. The discussions were productive and additional major publishers and literary agents contributed survey data despite the severe impact of the COVID-19 pandemic. (Please see the acknowledgements section in which the researchers express their appreciation to the respondents—anonimised—for their participation in this research despite the impact of COVID-19 on their business.)

Case studies

A longlist for the case studies was drawn up in consultation with the informal working group and in discussion with agents and publishers who participated in the introductory seminars. Dr Zwar contacted the CEO of the Small Press Network, Tim Coronel, to invite SPN members to nominate for case studies. Dr Airlie Lawson, a member of the research team for this project, had previously worked in senior rights roles in the UK and Australia. She drew on her knowledge of the industry to suggest case studies. Dr Crosby also provided feedback about individuals who had agreed to be interviewed for case studies as part of his industry liaison about the design of the survey questionnaire. Interestingly, although the questionnaire included an option to nominate for a case study, no one filled this out. Dr Zwar and Dr Crosby presented at the 2019 Small Press Network annual conference industry day on 22 November to encourage small publishers to fill out the survey and to nominate for a case study.

Over several iterations, longlists were developed and refined to represent a range of case studies as follows:

- Different genres including commercial fiction, literary fiction, adult non-fiction, illustrated books and children’s books¹⁴
- Australian Indigenous writers and their work
- Literary agents
- Large and small publishers
- International bestselling authors and books, and more commercially modest but significant rights sale successes
- Authors who have sold their work overseas by a range of methods including traditional rights sales and Indie publishing (self-publishing)
- Rights sales successes occurring at different periods over the ten-year timeframe of the study
- The impact of literary awards on rights sales
- Well-known success stories of rights sales and lesser-known examples

A number of Australian publishers are recognised within the book industry for their long-standing success in rights sales. These include large publishers such as Allen and Unwin, Penguin Random House and HarperCollins, and small to medium publishers including Text Publishing, Scribe and Black Inc. These publishers have without doubt played a key role in the growth of international rights sales of Australian books in this study. Individual Australian literary agents have also been pioneers in international rights sales, including Lyn Tranter, Jenny Darling, Mary Cunnane, Sheila Drummond and others.

Unfortunately, interviews for the case studies commenced from February 2020, just as the COVID-19 pandemic took effect in Australia and this meant that a number of publishers and agents were simply not able to be interviewed while they dealt with pressing and ongoing business concerns. They expressed their regrets in phone calls and emails and it is hoped that if a repeat study is conducted, these case studies could be included in the future.

Despite these challenges, the depth and range of rights sales successes meant that there was still a rich, diverse range of case studies available to choose from. In the end, the research team settled on the following:

Agents

Mary Cunnane, former literary agent and publisher, co-founder of the Australian Literary Agents’ Association

Tara Wynne and Caitlan Cooper-Trent, Curtis Brown Australia and President of the Australian Literary Agents’ Association

Gaby Naher, Left Bank Literary, former President of the Australian Literary Agents’ Association

Publishers

Ivor Indyk, Giramondo Publishing, one of Australia’s leading small, independent literary presses

¹⁴ In this report, “genre” is also applied to category, in line with the Australia Council for the Arts use of the term

Katy McEwen, Pantera Press, a recognised *Heatseeker* by Nielsen Bookscan three years in a row (leading independent publishers showing both short-term and long-term growth)

Alexandra Yatomi-Clarke, Berbay Publishing, a small children's publisher awarded best publisher at the 2017 Bologna Children's Book Fair

Authors and author advocates

Trudi Canavan, internationally bestselling fantasy author

Jesse Fink, acclaimed narrative non-fiction author

John Flanagan, internationally bestselling author of middle grade series

Richard Flanagan, internationally acclaimed literary author

Olivia Lanchester, CEO, Australian Society of Authors

Melissa Lucashenko, Miles-Franklin-winning Aboriginal writer of Goorie and European heritage

Juliet Rogers, former CEO, Australian Society of Authors, former MD of Random House (NZ and Australia), former CEO of Murdoch Books

Kylie Scott, *New York Times* bestselling romance author

Elisabeth Storrs, historical fiction author, founder of the Historical Novel Society Australasia

Shaun Tan, Astrid Lindgren and Oscar-winning illustrator and author

Charlotte Wood, winner of the 2016 Stella Prize, joint winner of the Prime Minister's Literary Award for Fiction

Two additional case studies include the role of publication grants for translation in enabling international rights sales, and the relationship between screen rights and international rights (book-to-film adaptations). Dr Airlie Lawson prepared case studies on Trudi Canavan, Jesse Fink, John Flanagan, Charlotte Wood and Richard Flanagan, Shaun Tan, the case study on translation grants, and the relationship between screen rights and international rights. Dr Zwar prepared the other case studies. A background interview was also conducted by Dr Jan Zwar with Jacinta di Mase, Jacinta di Mase Management, which was extremely valuable for identifying and discussing industry trends over the timeframe of the study.

The case studies were prepared independently by Drs Zwar and Lawson. In some cases, the researchers had long-standing associations with the interviewees, in some cases the researcher initiated contact directly via phone or email without prior association and invited the interviewee to participate, and in others an introduction was provided by Wenona Byrne, Director of Literature, Australia Council for the Arts.

Dr Zwar conducted online research prior to each interview and prepared a tailored list of questions which were emailed in advance to the interviewee. In her phone discussion and emails, she advised that the questions were intended as guides and interviewees were encouraged to initiate any discussion they considered was relevant to the project. The interviews were recorded and transcribed for internal use only. Dr Zwar provided a draft copy of the case study for review, editing and clearance by the interviewee.

Dr Lawson conducted online research prior to each interview and prepared a tailored list of questions which were emailed in advance to the interviewee. Interviews were conducted via phone and/or email; notes were taken. Dr Lawson provided a draft copy of the case study for review, editing, and clearance by the interviewee. Dr Paul Crosby, the project manager, reviewed all case study drafts from an early stage to ensure a

consistent approach. The case studies were made available to other members of the research team after they had been cleared for release.

After the case studies had been completed, Dr Zwar commenced writing up common themes and observations about trends in international rights sales which could be investigated in the survey responses when the complete data set was available. Likewise, early findings from the survey data in progress informed questions in the case studies to illuminate trends.

A consultation meeting was held with Professor Katherine Bode, Australian National University part way through the project, to discuss preliminary findings and invite feedback.

A draft report was provided to members of the informal working group and Tara Wynne, President of the Australian Literary Agents' Association before the report was finalised. Draft copies were also provided to Professor David Carter (University of Queensland), Professor Mark Davis (University of Melbourne), and Professor David Throsby (Macquarie University) for feedback.

Key findings

How are rights traded?

There are different ways of trading rights: the type of trade agreement will reflect the category of book and the target market. One model is the payment of an advance and royalties paid on the recommended retail price (RRP) or selling price. The term of the agreement might be for the term of copyright, or a limited term (say five, seven or ten years), or a limited print run (for example, a maximum of 1,000 copies with additional print runs subject to a new fee). This model is the most often used for licensing rights in adult general fiction and non-fiction, and children's books including picture books. Once a deal has been finalised, the local publisher might supply native digital files (if the deal is for the English language), or the final text via PDF or finished copy to enable translation work to commence. The third-party publisher has control over their production including any additional edits, new cover design, logos etc.

Often, however, the high production costs associated with illustrated works (such as some children's picture books and illustrated reference books) can mean that it is more economical for a publisher to print multiple editions at the same time which can be sold into different territories: these are known as co-editions. This model is normally a publisher-to-publisher agreement and these are often (but not always) royalty inclusive—that is, the royalty is included in the unit price rather than paid separately. The copyright holder will still receive payment of the royalty whether the deal is structured as inclusive or exclusive.

The payment of an advance and royalties can mean that the author receives a higher share of the income. The second model (co-editions) offers the advantage of cost and quality control but the author receives a lower share of the income. Regardless of the deal structure, both types of trading models have the same outcome: works enter the international market under an international imprint, rather than the Australian imprint.

Australian books can also be distributed directly overseas by a domestic publisher. An important consideration by a rights seller in an Australian publishing company will be whether a title has the potential to secure a rights deal or not. For example, a narrative non-fiction title on a popular topic with broad international appeal may sell well as a direct export but it may be more difficult to secure a rights deal if the book would be competing with international high-profile authors on the same topic. In these cases, direct export may be a viable alternative.

The returns to authors are structured differently between direct export and rights sales. In rights sales, the author receives the majority share of the income compared to the publisher that has negotiated the deal, but achieving a rights deal is not always possible. If a publisher, therefore, negotiates a direct export agreement, an advantage to the author can be speed to market, however, there are often high discounts on the pricing of the books, meaning that the percentage that is returned to authors can be relatively low.

Who trades rights?

Authors' rights are usually represented and licensed by literary agents and rights sellers based in publishing houses.¹⁵ The key roles in international rights sales can be described as follows:

Literary agents

A literary agent represents their author's works to publishers both at home (Australia and New Zealand) and in the international markets. Among many other aspects, their role includes holding key knowledge of the markets (particularly the home market of Australia and New Zealand), an ability to negotiate publishing contracts and ensure payments are received. Literary agents also work closely with their authors and their authors' publishers on editorial matters, publicity and marketing.

Rights sellers in book publishers

Rights sellers differ from literary agents in two key areas. Firstly, they are employed 'in-house', that is, they work for the publishing house; and secondly rights sellers aren't as closely connected to the author's works they represent. Rights sellers need to have a strong knowledge of the publishing markets outside of Australia and New Zealand. Unlike literary agents, who have a myriad of other responsibilities on behalf of their authors, rights sellers focus solely on securing new publishing deals with third parties. Like literary agents, rights sellers need the ability to negotiate rights contacts with third parties and ensure that their publisher (the rights seller's employer) receives payment, which is then shared with the author. A literary agent might grant world rights to the Australian publisher so that the rights sellers can license the rights through their networks, or an agent might retain them and look to license these rights themselves through their own networks. Ultimately, the decision of who represents the rights can depend on who is best placed to license them.

Book scouts

Literary scouts have a very different role to literary agents and rights sellers but are a big part of the rights selling ecosystem. Literary scouts quite literally 'scout' the book world seeking particular titles that will suit their publishing clients. Scouts stay in touch with rights sellers (both rights sellers and literary agents) who in turn keep the scouts informed of new acquisitions and new titles on their rights lists in order for the scouts to send their regular reports on new titles to their clients. Those reports from the scouts highlight the titles that they feel their clients should focus on or should know about. A scout can only have one publishing client in a particular country. So, a scout may have 10 clients from around the world. What unites those clients is that they are not strictly competitors (they publish in different markets and languages) but they might have similar publishing lists. A scout's report on a particularly exciting new title can mean that the scout's clients are informed of the work before they've even received a manuscript. One rights seller commented, "Book scouts are fantastic, and they are really good at creating buzz around a book."

Co-agents

Rights sellers and literary agents work with co-agents in the translation markets and might have a network of over 30 co-agents in the various markets. Co-agents—also known as sub-agents—focus on their markets. (A German co-agent is very likely to be

¹⁵ Unless otherwise specified, the term "rights sellers" will be used in this report to describe individuals working within publishing houses.

based in Germany, for example, and their role is to license German-language rights to German publishers on behalf of the rights sellers and/or literary agent). To reach as many markets as possible, rights sellers and literary agents might have a network of co-agents reaching directly into the large translation markets of Germany, France and China, to ‘smaller’ markets such as Estonia, Turkey and Indonesia. These co-agents have an in-depth knowledge of the publishing houses in their market, and the specific editors. They meet regularly with those editors, gaining market knowledge on who is looking for what, and pitching titles on behalf of rights sellers and literary agents, in order to secure deals in that market. Co-agents are often best placed to sell a title in another market and have the networks to pitch it effectively, and to pitch in the language of that market.¹⁶

Methods of trading

Rights can be licensed either directly or indirectly. When rights are licensed directly, a literary agent or publisher will approach third-party publishers directly to pitch, submit and negotiate) and this is most common with the English language markets of North America or the United Kingdom. In examples of indirect negotiations, one party might engage a co-agent.

Authors, literary agents or publishers may also use a database, Google or LinkedIn to identify potential acquisition editors where the aim is to work directly. The end goal is the same: to generate interest in a specific title or author, receive and negotiate an offer resulting in a contractual agreement with a third party for publication in a new market.

The primary requirement for trading rights is the contractual authority to trade them. This depends on whether the author has granted the necessary subsidiary rights to their local publisher, or to their literary agent, or retained them so that the author can approach other markets directly. Key considerations for choosing who will represent an author’s rights include: the rights seller’s suitability and ability: suitability might depend on the category of work (for example, publishers are in the best position to enter into co-edition agreements for illustrated titles), or the rights seller’s track record of previous rights sales for titles in similar categories (such as adult fantasy titles); ability depends on the rights sellers level of experience, their connections in the international markets and their motivation.

Regardless of whether a publishing house or literary agent is working to secure rights deals, all rights sellers interviewed for this research project stressed that they take great pride in achieving the best deals possible for each title and author. While there is a financial motivation (the rights seller receives a commission), the majority of the income from international rights sales is paid to the author either directly (via a literary agent) or through royalty accounting (via a publisher).

Why trade rights?

Rights are traded for five key reasons: to increase the reach of the work and develop new audiences and readerships through publications in different markets; to increase the author’s revenue from work they have already created; increase an author’s profile on an international stage; and ensure a work is culturally accessible for an individual market (for instance: cover, format, spelling, language). From a publisher’s perspective, rights income also offsets the author’s advance which reduces risk and can help build

¹⁶ The terms co-agent and sub-agent are often used interchangeably, and are in this report.

buzz ahead of publication. Rights sales also have the potential to generate positive spillovers such as cultural exchange and soft diplomacy, particularly when a significant but not necessarily commercial work is sold.

What proportion of Australian-authors books will ‘travel’ to overseas sales territories?

Opinions vary as to the proportion of Australian-authored books which could achieve overseas rights sales but the agents and rights sellers generally agreed that the most significant market for the majority of Australian books is Australia and New Zealand (ANZ). Two interviewees referred to overseas rights sales as “icing on the cake”. Some agents and rights sellers estimated that half of the books on their lists had the potential for international rights sales, for others it was perhaps 10 to 20 percent of their titles. This estimated range must be considered in the context of all the Australian books that are published each year, not just those by authors who have agents or publishers with rights sales capacity or who are selling directly to large numbers of overseas readers. Therefore, the proportion of all Australian-authored books with the potential for international rights sales must be considered to be low overall. However, for those authors whose books are sold internationally, there are significant benefits including income, recognition, access to international readerships and networks of overseas authors and publishers. There are also broader benefits for the Australian book industry which will be discussed further on.

How are rights to Australian-authored books sold by agents and publishers?

In Australia, the rights to a book are initially owned by (“vested in”) the author. The author may then grant the rights to an agent or publisher to sell or may sell them directly.

An Australian author who has a literary agent will probably leave their subsidiary rights with that agent. Many authors are represented by literary agents who are based in Australia (with the majority being based in Melbourne and Sydney), however Australian authors are also increasingly represented by agents in the US, UK and other countries. Some bestselling Australian authors have long-standing professional relationships with their agent in Australia and also have an agent or agents overseas.

As an example, let us assume that the Australian author has a literary agent based in Australia. Usually, the key task for the agent will be to get the best deal possible for publication in ANZ (Australia and New Zealand). The agent is likely to have long-standing relationships with all the local publishers who may have an interest in publishing the author’s book. If the author has published with an Australian publisher previously and it was a positive experience, that is likely to be a strong option. Indeed, if the author previously published successfully with an Australian publisher, the agent is likely to have kept the Australian publisher briefed about progress with the next book, with a view to signing a deal. The publisher may also have sales figures for the previous books by that author. That will be a factor in the publisher’s interest in the new book and the size of the advance offered.

Publishers have a ‘list’: a list of all the books they have published and are hoping to publish depending on the particular types of books they’re interested in. It is the job of agents to have a detailed knowledge of publishers’ lists and interests and where their own clients’ books might fit. For example, one publisher may be expanding its offerings in upmarket women’s fiction, another publisher may be expanding its children’s or adult

non-fiction titles. Further, the publishers will have reputations for handling and positioning particular sorts of books successfully: from editing, to cover design to distribution to promotion. Agents will seek to place their author's book with a publisher who has the best chance of publishing the book in a manner that will meet the author's expectations and in achieving sales.

In discussions between an agent and an Australian publisher, the publisher may pitch for world English language rights, that is, the publisher wants the right to on-sell the rights in the book for publication in US, UK, Canadian and other English language territories.¹⁷ The publisher may also pitch for world rights (including translation), which is the right to on-sell the book for publication in other language territories including countries in Europe, Asia, South America and others. In these situations, the agent will consider whether the publisher is best placed to on-sell the rights internationally. Many Australian publishers including Allen and Unwin, the Australian arms of multinational publishers and leading independents including Text, Scribe and Black Inc have a long history of successfully selling the rights to Australian books internationally. Further, many other Australian smaller publishers have developed this capability (for example see the case studies on Pantera Press, Berbay Books and Giramondo in this project).

If the author and the agent agree to grant world English language rights or world rights to an Australian publisher, then the task of selling the rights falls either to a specialist rights seller or another role in the company which also has responsibility for rights sales (such as the publisher or managing director in a smaller operation).

Regardless of whether the literary agent or the rights sellers inside a publishing house holds the rights on behalf of the author, their role is the same: to have a knowledge of the international markets and their differences, to have a sense of which markets this individual book might have potential in, to pitch the title to their networks of co-agents in translation markets and ensure those co-agents have all material, selling points that they will need to pitch directly to their in-market publishers; to assess whether to submit directly to publishers in English speaking markets such as North America or the United Kingdom, or perhaps approach a co-agent in both markets to gauge their interest in that title and whether there is an opportunity for collaboration.

All the rights sellers and publishers interviewed for this research stressed that research is a key component of their role. This involves reading trade publications such as *Publishers Lunch* and *Publishers Weekly*, which report rights deals. It involves extensive "desk work", keeping across how a change of editor at a publishing house may affect the plans for that imprint's list; being across trends in key markets, what is on the bestseller lists, when trends appear to be waning and new trends emerging. For example, some agents interviewed for this research spoke about a decline in the popularity of historical fiction in favour of contemporary settings in women's fiction, however they wondered whether the success of Hilary Mantel's *Wolf Hall* trilogy which concluded with *The Mirror and the Light* in 2020 might lead to interest in other historical fiction. Other examples of international trends include the immense popularity in the German market of rural romances set in Australia, a trend which has largely ended due, in part, to German readers changing tastes in romance novels, the rise in popularity of Australian crime across many and varied international markets, and the current active interest in children's books with strong environmental themes.

¹⁷ When used in this context "on-selling" is also known as "sub-licensing".

Rights sellers and agents combine this desk research with travel to international book fairs where rights are bought and sold. The most significant international fairs are the Frankfurt Book Fair, the London Book Fair and the Bologna Children's Book Fair. There are also significant book fairs in New York, Shanghai and other locations. These are intensive events over several days where tens of thousands of publishing-industry people converge to meet with the intention of doing deals, networking and trading information about market and industry developments. The meetings—colloquially known as 'slots'—last for 30 minutes and are held back-to-back. Scheduling these meetings begins months before the book fair itself. Rights sellers and agents use these 30 minutes slots to pitch their lists, establish relationships with new international contacts, consolidate existing relationships, learn from overseas publishers and agents what is selling in various territories and what each market is looking for, and just as importantly, what they're not looking for. In addition to these meetings (which can be up to 15 per day), the networking extends to social functions including breakfasts, drinks and dinners. These face-to-face meetings are a key opportunity to establish rapport and trust, which will then be continued remotely for most of the year via email, social media and other media such as Zoom meetings.

The stage at which a book is taken to the international market varies. Ultimately rights sellers aim to begin pitching and submitting before publication in the home (ANZ) market. This is particularly true in submissions to the English market territories of North America and the UK. Strategies of how rights sellers approach the market also depend on the title. In non-fiction, for example, an exceptionally strong proposal and sample chapters from a leading expert in the field might be enough to warrant submissions; for fiction, perhaps the right seller will wait for an edited manuscript. In all cases, it can depend on how strong that initial material is. Ultimately, the decision might rest on how strong is that initial manuscript, and whether it would be preferable to wait for an edited manuscript.

For the translation markets, strategies can vary. The larger translation markets (such as Germany and France) can also be keen to see pre-publication material. Other markets might take a 'wait and see' approach. They might wait until post-publication when a decision to acquire the rights for the market can depend on how successful a title has been in the home market, what level of review coverage or publicity and how many other territories have already acquired the rights.

In the case studies, many of the rights sellers mentioned a specific international bestseller and named the US-based co-agent who had been effective in securing a strong deal for the book in the US. Further, many of the agents and rights sellers referred to their use of co-agents who specialise in the European territories.

Going back to our original example, the Australian literary agent and their client, if the author decides to licence ANZ rights to an Australian publisher only, the literary agent may sell the international rights through overseas-based co-agents or to overseas publishers, or a combination of both. In the case of some bestselling authors, the Australian agents may work in conjunction with an overseas-based agent who also represents the author directly. The process of finding the key contacts with an understanding of the markets for that particular title and the ability to do deals that will lead (hopefully) to publication are broadly similar to those outlined above.

There are also other models of international publishing by Australian authors. Elisabeth Storrs is an historical fiction author who has been published by traditional

publishers, self-published and is currently published by Lake Union Publishing, an imprint of Amazon. Storrs discusses the ways that Amazon's marketing to historical fiction readers in the US, Europe, UK and other territories has enabled new readers to discover her books in far greater numbers than would be usual if her work was marketed by a traditional publisher. Traditional publishers usually focus on promoting frontlist titles, that is, books which have been released within the last 12 months.¹⁸

In discussion with the literary agents and publishers for this research, a number of themes about the process of selling rights came up repeatedly.

First, the business of international rights sales is built on relationships. This involves knowing an overseas agent or publisher's taste (what sort of books they'll be motivated to represent effectively), their acuity and effectiveness in getting a book to market either as a publisher or co-agent, and what types of books are succeeding and not succeeding in their market. This could include a history of the books they have represented effectively previously and the perhaps slightly obscure informal reasons why they may be enthusiastic about representing your client's book.

Second, it may take years before a relationship with an overseas co-agent or publisher leads to an Australian book being published in their territory. A book has to fit their list and they have to be confident of selling enough copies. Even if an agent or publisher likes a book personally, they will not take it on if they believe it will not sell sufficient copies in that territory. All the agents and publishers interviewed for this project have experienced numerous examples of feedback that a book was "too Australian" for an overseas market even though the agent or publisher had high regard for it. Likewise, Australian publishers will be making the same judgements about whether books written overseas will be commercially viable and appealing in the Australian market, regardless of their personal regard for a title.

Third, success can lead to success. The perception that international bestselling titles are originating in Australia drives a focus towards our market. *The Dry* by Jane Harper was not the first contemporary internationally bestselling Australian crime novel (arguably, that honour might go to Peter Temple but the media attention around *The Dry* ignited international interest in other contemporary Australian crime authors. This doesn't imply that it is suddenly any easier for rights sellers to license rights in all Australian crime authors—it will still very much depend on the writing, plot, characterisation, narrative tension and subjective opinion; but it can open doors to place those titles on international desks for their review.¹⁹

Fourth, a consistent long term presence at international book fairs. Australia has long had a presence at the major book fairs such as Frankfurt, London and Bologna which can assist newer Australian publishers seeking to establish their authors internationally. Katy McEwen, Pantera Press, described the growing credibility that Pantera gained

¹⁸ Previous research by Macquarie University found a tacit understanding among many Australian authors that after their book has been released to market, responsibility will shift to authors to keep alive interest in their books as the publishers focus on the next releases in their schedule (Throsby, Zwar, & Longden, 2015d).

¹⁹ Historically Australia has produced a substantial number of internationally successful crime novelists with well-known examples including Fergus Hume in the late 1800s and Arthur Upfield in the 1920s. For further information about the earlier success of Australian crime writers in the USA, see Carter and Osborne (2018).

(with international publishers) over time. Pantera began attending book fairs as part of the APA stand and building networks.

Finally, a sophisticated, professional international presence on the part of the Australian book industry at key book fairs and a positive profile in the international industry in general increases the opportunities for agents and rights sellers to achieve sales for Australian-authored books. The international market for rights sales is extremely competitive. The growing awareness that Australian authors can reach the top of international bestseller lists (e.g. John Flanagan, Andy Griffiths and Terry Denton), win international book awards (e.g. Richard Flanagan), become the basis for top-rating American television adaptations (e.g. Liane Moriarty); contribute to the overseas profile of Australian books and provide a platform from which to sell rights.

How are Australian-authored books sold directly by the author?

This report includes case studies of authors who have sold their work directly to readers (Indie publishing or self-publishing) as well as through traditional publishers. Kylie Scott is a *New York Times* bestselling romance author who has an agent based in New York. Romance readers tend to read large numbers of romance books and many bestselling romance authors have successfully turned to Indie publishing and increased their income through this business model. Scott has transitioned to Indie publishing but still retains her agent, who handles much of the publishing arrangements and finances while Scott concentrates on writing and interaction with her readers. Scott's books are available online through ebook retailers and can also be ordered as print books. They are not available in discount department stores and bricks and mortar bookshops (however Scott noted that these outlets have traditionally not stocked romances in significant numbers). Scott's large readership enables her to retain an agent and employ assistants, other Indie authors may take on all aspects of the publishing work themselves.

Which types of Australian-authored books are likely to 'travel' (achieve rights sales) overseas?

The literary agents and rights sellers interviewed for this research discussed a number of types of Australian books which are likely to 'travel' (achieve rights sales) overseas. The following discussion is a generalisation only.

First, there has been success over the past decade with women's fiction which could variously be described as 'upmarket women's fiction' or 'book club' books. These books are very well-written and crafted, and often have international settings. It is not clear whether Australian authors are writing more of these types of books or they are being sold more effectively or overseas markets are more receptive, but their success in terms of international rights sales over the last decade is notable.

Australian-authored children's books have also achieved significant success overseas. It's possible that, unlike adult fiction and non-fiction, children's titles are perhaps more international in their appeal. They are generally not geographically specific and more focused on the universal interests of children.²⁰ Jacinta di Mase, a literary agent based in Melbourne, noted that Australian children's book illustrators are also directly

²⁰ The success of Australian education authors has been noted previously in books for school-aged children (Zwar, 2016, pp. 253-254).

commissioned by overseas publishers: this particular export income is not captured in this research.

Australian authors have had remarkable success in a number of commercial fiction genres. These include Michael Robotham and Jane Harper in crime fiction; Matthew Reilly in action/thriller; Liane Moriarty in upmarket commercial fiction. The settings for these books may be international or may be Australian or a combination of both. Kylie Scott writes bestselling romances and sets most of her books in the US, where most of her readers are based, although she also writes books set in Australia.

Agents and international rights sellers discussed the challenge of selling adult non-fiction books overseas, because each territory has their own recognised experts on popular issues such as the environment, history, politics and so on. However, individual self-help titles were early examples of commercial success in the late 1990s (Nerrilee Weir gave the example of *Hot Sex* by Tracey Cox, parenting titles by Dr Christopher Green and Steve Biddulph, and Mary Cunnane gave the example of Kaz Cooke's *Real Gorgeous*), as were illustrated books such as the series of cookbooks published by Murdoch Books. The cookbooks were seen to have a fresh, contemporary approach to illustration and layout which were appealing to markets overseas as well as bestsellers in Australia (for example, Donna Hay).

Australian literary fiction is published across the board, from multinational publishers to independents (Text, Scribe) to smaller, specialist literary imprints and publishers (such as Giramondo). Literary fiction can be less profitable to publish in Australia and overseas, due to sales figures that are often lower than for commercial fiction. Ivor Indyk, the publisher of Giramondo (one of Australia's most respected literary presses) discusses in a case study the way that he has formed connections with like-minded literary presses overseas, and the careful economics by which they are able to publish leading literary works, including in translation, on modest budgets. Australian literary fiction is sold internationally and this is where discussion of the economics of publishing literary works can become complex. As Indyk notes, some works are ahead of their time and may sell in modest numbers despite winning literary prizes and achieving critical acclaim. Over time some of these works may be set on school curricula and become recognised as an important part of the literary canon. Eventually, a literary author may have a bestselling work after years of publishing. Melissa Lucashenko recounts that during her first 20 years as an author she earned less from her writing than if she had been on unemployment benefits, and she worked in other roles such as an Uber driver to supplement her income. Her latest book, *Too Much Lip*, won the 2019 Miles Franklin Literary Award and has been sold internationally. Many Australian books have been acclaimed for their literary qualities and have achieved commercial success in Australia and overseas. It is important to note that while much Australian literary fiction sells in modest numbers and may not 'travel', these books make important contributions to the Australian cultural landscape and how we view ourselves as a nation.

A small proportion of Australian-authored books sell more copies overseas than in Australia. This could be for a number of reasons, including:

- The authors have written genre-based bestsellers which achieve major sales in the US, UK, or European territories as well as in Australia, and the overseas markets are large. Liane Moriarty, Kate Morton (commercial women's fiction) and Michael Robotham (crime) are examples. These books are usually extremely well-crafted and feature international settings.

-
- The authors have developed larger followings overseas than in Australia, because there is a stronger appetite for the genres in which they write in other countries such as the US. Elisabeth Storrs, who writes historical fiction, and Garth Nix (who writes YA fantasy) are examples. Historical fiction and YA fantasy have much larger readerships in the USA than in Australia even taking into account the relative size of populations.
 - The subject matter has an international following. For example, Jesse Fink's books about AC/DC. Airlie Lawson's case study establishes that some international editors bought rights to publish the books in their own territories while not being aware that AC/DC is an Australian band.
 - The authors and Australian publishers have developed a fresh, distinctive approach to their subject matter which is recognised as a market leader overseas and which will appeal to book buyers in other territories. Examples include illustrated books (Murdoch Books' cookbooks), self-help (Kaz Cooke's *Real Gorgeous*, *Kidwrangling* and *Up the Duff*; Tracey Cox's *Hot Sex*) and children's books (Andy Griffiths' and Terry Denton's *Treehouse* series).
 - The authors have a very strong following for their distinctive books, stories and/or writing in particular countries. Katherine Scholes writes women's fiction which is set in Africa and these books are particularly popular in Germany. Kenneth Cook's following in France (Cook is the author of *Wake in Fright*) is another example.
 - The author has an international reputation for expertise in the subject matter which is sufficiently authoritative to stand out in a crowded international marketplace of book authors who are experts in their field. Peter Doherty, an Australian Nobel laureate in science and medicine is an example. Environmentalist Tim Flannery is another example.

However, income for the majority of Australian authors remains modest and their working conditions precarious.²¹

²¹ For a recent discussion see, Magner & O'Shaughnessy (2020).

Analysis of Rights Deals 2008-2018: Principal results

In this section, we present the principal results from the collection of rights sales information for the period 2008-2018. A summary of the rights sales data follows:

- 9,315 individual rights sales deals
- 1,792 unique authors
- 3,842 unique titles
- 92 territories (plus deals for ‘world’ rights)
- 70 languages

Before discussing the results in detail, we must first address issues concerning the representativeness of our sample. As noted in our discussion of the project’s methodology, 72 agents and publishers were originally longlisted and targeted to complete our survey. From this list we received rights sales information from a total of 31 respondents, resulting in an overall response rate of 43%. To assess the representativeness of our sample in more detail, we categorise each of the respondents and compare the targeted longlist population with our sample as follows:

Table 1: Comparison of longlist and sample populations

Category	Turnover	Longlist (%)	Sample (%)
Large publisher	\$10 million +	20	21
Small publisher	\$100,000 to \$9.99 million	31	25
Micro-publisher	Less than \$100,000	34	38
Agency	N/A	15	17

In terms of large publishers, our sample is largely representative of the targeted longlist population. One in five of our respondents were large multi-national publishers. Given that many of Australia’s rights sales deals are informally known to have been achieved by a relatively small number of large publishers, the positive response rate from this group adds validity to the results that follow (we discuss the number of deals from each group of respondents in detail below). In terms of small publishers, the sample is slightly underrepresented. Many of these entities were found to conduct rights sales with little to no employees dedicated solely to the task. As such, it was indicated that some longlisted respondents in this category did not have the resources to provide detailed records of their rights sales and transactions for the sample period. This was further exacerbated by the onset of COVID-19, which saw many employees forced to work from home with no access to the required records. Nevertheless, one in four of our respondents still hail from a small publisher. The sample is also largely representative of micro-publishers. Given the distinctive nature of rights deals among this group of respondents (as discussed at length in the case studies), it is crucial that these deals are adequately represented in our analysis. The overall proportion of respondents belonging to a literary agency is similar to the targeted longlist. However, care must be exercised when drawing conclusions solely from this group of respondents given the heterogenous nature of each agency, both in terms of organisational size and the nature of their activities.

The survey coverage of self-published authors who have sold rights overseas or generated substantial income through international sales is likely to be substantially under-represented. The researchers focussed on the longlists of publishers and agents to

encourage participation despite the impact of COVID-19. Therefore, the success of Australian self-published authors is a likely under-reported upside when considering the findings.

Overall, the sample is largely representative of the targeted longlist. However, the fact remains that we do not have accurate population data on which to perform statistical tests to establish confidence intervals for our results. Caution must therefore be taken when interpreting the results that follow. Nevertheless, given the information contained within the large number of deals gathered as part of the survey (n = 9,315) it is possible in the following analyses to identify general trends and patterns which are unlikely to be affected by these issues, such that overall conclusions concerning rights sales over the sample period can be validly drawn.

Deals over time

The number of international right sales deals completed in each year between 2008 and 2018 is presented in Figure 1. The average annual number of deals over the survey period is 847 (one book may be associated with a number of deals). In 2009, we see a 15 percent decline in rights sales as the international book industry grappled with the retail uncertainty associated with fallout from the global financial crisis. Although there was a strong recovery in the *number* of deals in 2010 (and it's possible that smaller offers were acceptable in this environment), this was followed by another steep decline in the number of deals in 2011. This decline echoed a weakened demand for books worldwide during this period. Overall, there is evidence to suggest that the number of rights deals completed annually by Australian publishers and literary agents correlates with underlying international book industry conditions and wider macroeconomic indicators. That is, the opportunities for rights sale for a particular title with good international prospects are likely to be affected by sentiment in the international book industry and broader macroeconomic conditions. If a book is pitched to international rights buyers and prospective co-publishers in a tough international economic climate—especially if the book is not authored by a high-profile author with a strong sales track record, the prospect for achieving rights sales may be negatively affected despite the book's otherwise strong international potential.

To smooth out the 'noise' associated with annual fluctuations in the number of rights deals, Figure 2 tracks the number of deals per year against a 3-year moving average. After a declining trend in the earlier years of the sample period (2008-2012), there has been a sustained recovery since 2013. Notably, in each year since 2015, the number of rights sales have been tracking well above the forecast predicted by the 3-year moving average. The key drivers of these fluctuations and patterns of growth are discussed in detail in the results that follow.

Figure 1: Number of international rights deals per year and annual rates of change

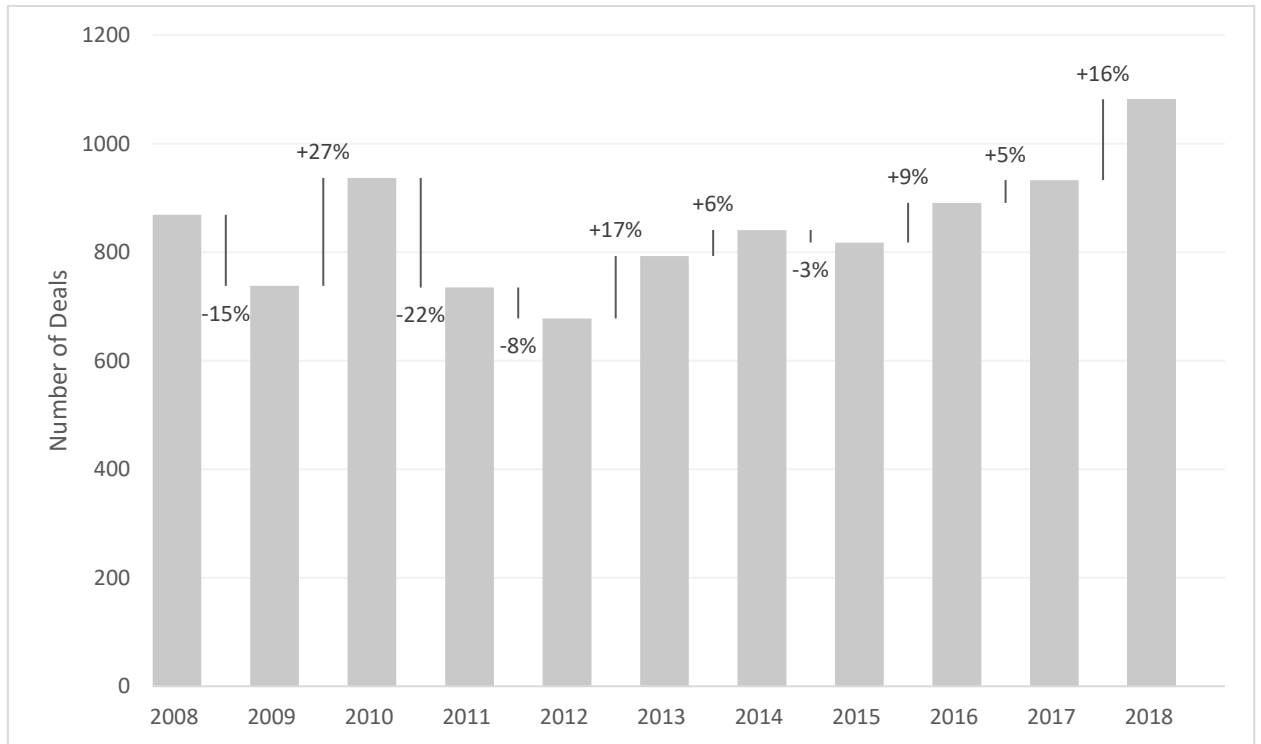
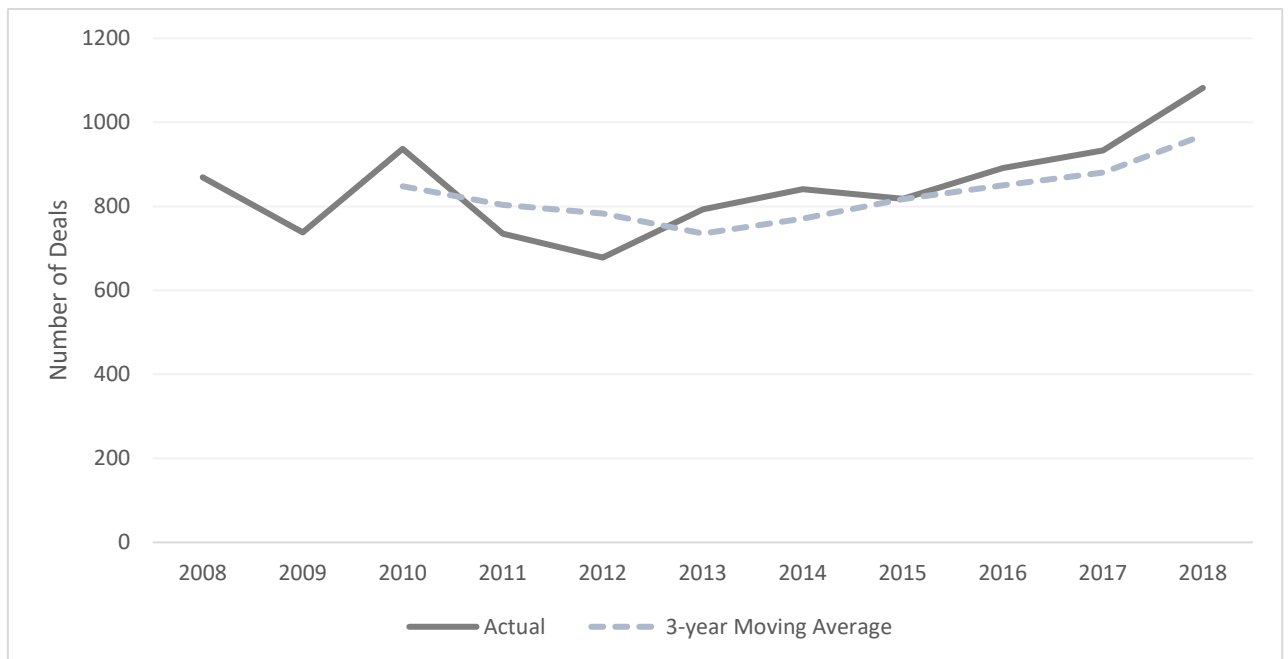


Figure 2: Number of international rights deals per year - actual versus three-year moving average



Deals over time by respondent type

In Table 2, we present the annual number of deals with percentage shares based on the type of respondent. Of the 9,315 rights sale deals contained within our sample, almost two-thirds (64 percent) were secured by large publishers, just over one fifth (22 percent) of deals were secured by agencies and one-tenth of deals were secured by small

publishers (that is, with annual turnover between \$1 million and up to \$10 million). Micro publishers accounted for the remaining 3 percent of deals.²² The evidence is that the Australian arms of multinational publishers plus Australia’s largest independent publishers, have played an active, successful role in establishing and growing the international market for rights sales of Australian books. Literary agents have also played an important role. The case studies include accounts by rights sellers and literary agents suggesting that this Australian onshore industry capability developed from the late 1980s. Because the data in this report commences in 2008 it is not clear exactly when the Australian industry developed some type of “critical mass” in rights sales capability, but it appears that between the 1980s and 2008s through a combination of mentoring, the relocation of overseas industry professionals (especially UK and US-based) with established international networks and rights sales experience to Australia, and learning through experience, Australian industry capability was growing to the point where at the opening point of the survey in 2008, a strong level of activity is already evident. While the number of deals by micropublishers is a relatively modest percentage, that too is trending upwards even as the total number of industry deals increases annually in the latter half of the survey period.

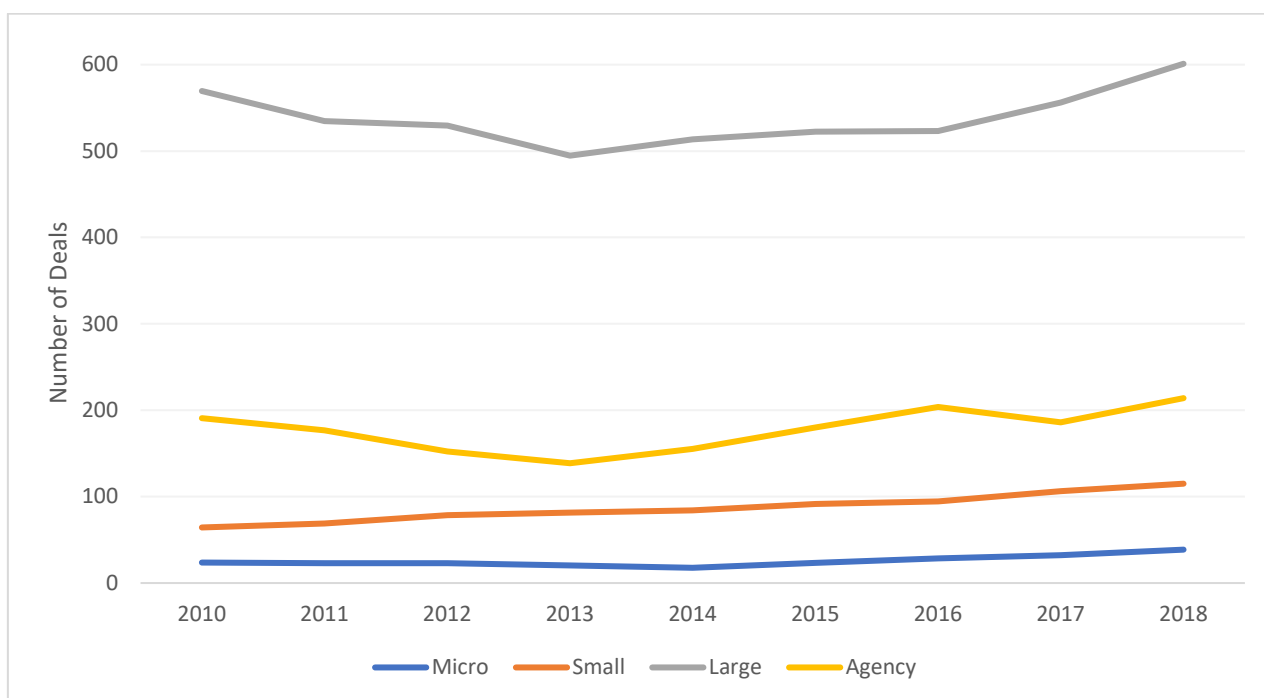
Table 2: Percentage contribution of deals by respondent type

Year	No. of deals	Percentage contribution			
		Micro	Small	Large	Agency
2008	869	3%	6%	68%	23%
2009	738	3%	9%	62%	27%
2010	937	3%	8%	71%	19%
2011	735	4%	9%	66%	22%
2012	678	3%	14%	65%	18%
2013	793	2%	11%	70%	17%
2014	841	2%	9%	64%	25%
2015	818	4%	14%	57%	24%
2016	891	4%	11%	63%	23%
2017	933	3%	11%	69%	17%
2018	1082	5%	13%	56%	26%
<i>Total</i>	<i>9315</i>	<i>3%</i>	<i>10%</i>	<i>64%</i>	<i>23%</i>

Figure 3 displays the three-year moving average of deals per respondent type. During the sample period, we see a significant expansion to the overall contribution of rights sales from both the small and micro publishers. This is particularly evident since the beginning of the overall upward trend in rights sales in 2013, where the number of rights deals signed annually by small and micro publishers has almost doubled (albeit from a relatively small base). Large publishers and agencies appear to be subject to increased levels of year-on-year volatility in their rights selling, likely due to the broader nature of their activities couple with heightened exposure to both international market uncertainties (including macroeconomic volatility) and the risks associated with the “blockbuster” best-seller model discussed in the literature review.

²² Note: large, small and micro publishers are classified using the annual turnover boundaries defined in Table 1.

Figure 3: Number of international rights deals per year by respondent type - three-year moving average



Deals over time by genre

Of the 9,315 rights sale deals contained within our sample, over half (54 percent) involved titles targeted at younger readers (picture books: 21 percent, middle grade: 27 percent, teen & young adult (YA): 6 percent). Rights deals for adult fiction titles (including literary, commercial and crime & thriller) make up 24 percent of all deals reported in the survey. Adult non-fiction titles account for the remaining 22 percent.²³ The importance of children's and middle-grade books in the number of international deals as an ongoing contributor to the Australian book industry is a stand-out finding here: further on we examine the size of deals (within some constraints including the decision not to include information about royalty payments in the survey data). Adult non-fiction is also a significant genre as a stable contributor to the number of deals achieved annually.

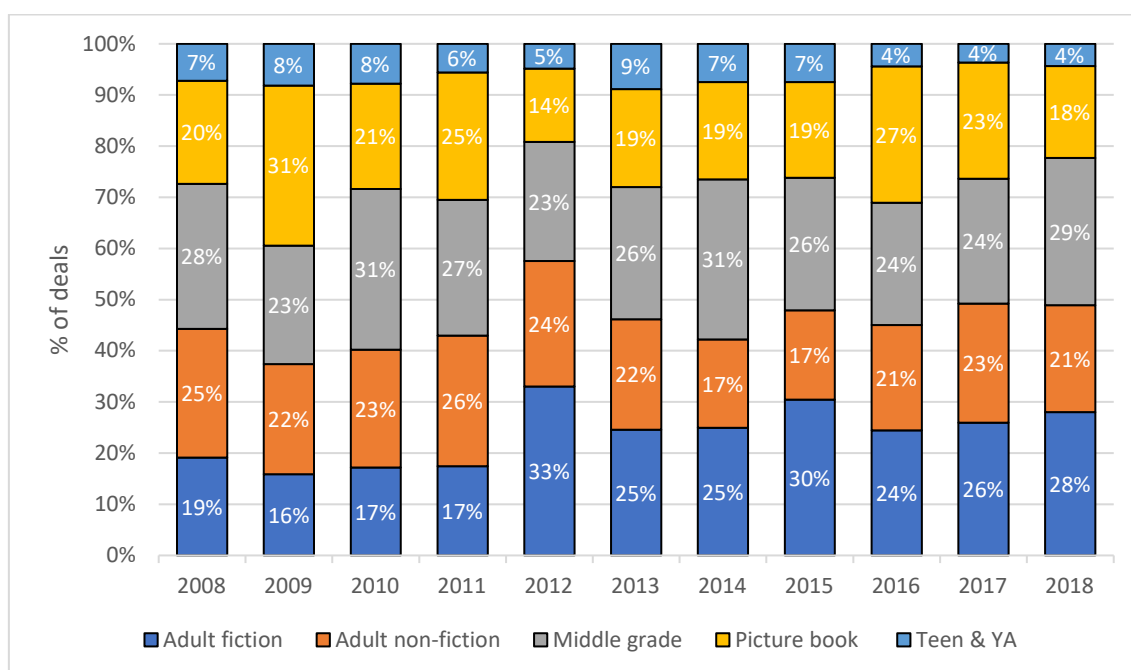
Table 3 shows the annual number of deals with percentage shares based on the genre of the title. A graphical representation of the same data is provided in Figure 4. Here we can see that there appears to be a structural break in the contribution of adult fiction deals from 2012 onwards. The percentage contribution of deals for this broad genre almost doubled from the 2011 amount (increasing from 17 percent to 33 percent). Since this time, adult fiction titles have largely maintained their share in terms of all Australian deals. The timing of this shift coincides with the growth in the absolute number of deals discussed earlier. This suggests that an increase in the prominence of Australian authored adult fiction titles may be a key driving force behind the growth in the number of deals over recent years. (This increase is discussed further on.)

²³ Note: analysis of narrower genre definitions is excluded from the subsequent analysis due to the small number of titles in some categories and years.

Table 3: Percentage contribution of deals by genre

Year	No. of deals	Percentage contribution				
		Adult fiction	Adult non-fiction	Middle grade	Picture book	Teen & YA
2008	869	19%	25%	28%	20%	7%
2009	738	16%	22%	23%	31%	8%
2010	937	17%	23%	31%	21%	8%
2011	735	17%	26%	27%	25%	6%
2012	678	33%	24%	23%	14%	5%
2013	793	25%	22%	26%	19%	9%
2014	841	25%	17%	31%	19%	7%
2015	818	30%	17%	26%	19%	7%
2016	891	24%	21%	24%	27%	4%
2017	933	26%	23%	24%	23%	4%
2018	1082	28%	21%	29%	18%	4%
<i>Total</i>	<i>9315</i>	<i>24%</i>	<i>22%</i>	<i>27%</i>	<i>21%</i>	<i>6%</i>

Figure 4: Percentage contribution of deals by genre



Deals by genre and respondent type

Table 4 presents the number of deals by respondent type and genre. The data reveals several differences in the percentage contributions made by each of the respondent types across each broad genre. Large publishers and agents are evenly matched in terms of the number of adult fiction deals. However, large publishers are responsible for the vast majority (almost three-quarters) of adult non-fiction, picture books, middle grade, and teen & YA deals. Agencies are particularly underrepresented in terms of adult non-fiction titles, whereas micro and small publishers contribute a greater percentage of these deals. On the other hand, micro publishers are responsible for just one percent of deals for titles aimed at younger readers.

Table 4: Percentage contribution of deals by respondent type and genre

Genre	No. of deals	Percentage contribution			
		Micro	Small	Large	Agency
Adult Fiction	2213	5%	18%	43%	34%
Adult Non-fiction	2033	7%	15%	72%	6%
Picture books, middle grade, teen & YA ²⁴	5069	1%	5%	71%	23%
<i>Total</i>	<i>9315</i>	<i>3%</i>	<i>10%</i>	<i>64%</i>	<i>22%</i>

Deals by language

Among the 9,315 international rights sales secured during the sample period, 8,325 (89 percent) specified a language. For the remaining deals, language was either not specified or the deal was for ‘world’ rights, or some other broad group of languages. In total, 70 unique languages were included in the sample of deals collected. Table 5 shows the shares of languages in the number of deals over the entire sample period. All languages associated with over 50 rights deals are specified in the table, otherwise, that language is classified as ‘other’. As expected, given the nature of the Australian market, English is the most frequently specified language, accounting for almost 1 in 5 titles. It should be noted that many of the ‘not specified/world’ deals (10.6% of deals) are also likely to be published in English, despite this not being stated on the contract. Of non-English languages, Chinese (both simplified and complex characters) and Korean are the most specified translation languages. This is followed by German, Portuguese, French, Spanish, Turkish, Polish. Dutch rounds out the top 10. Overall, there is a heavy skew towards the top five languages, which account for over half of all deals.

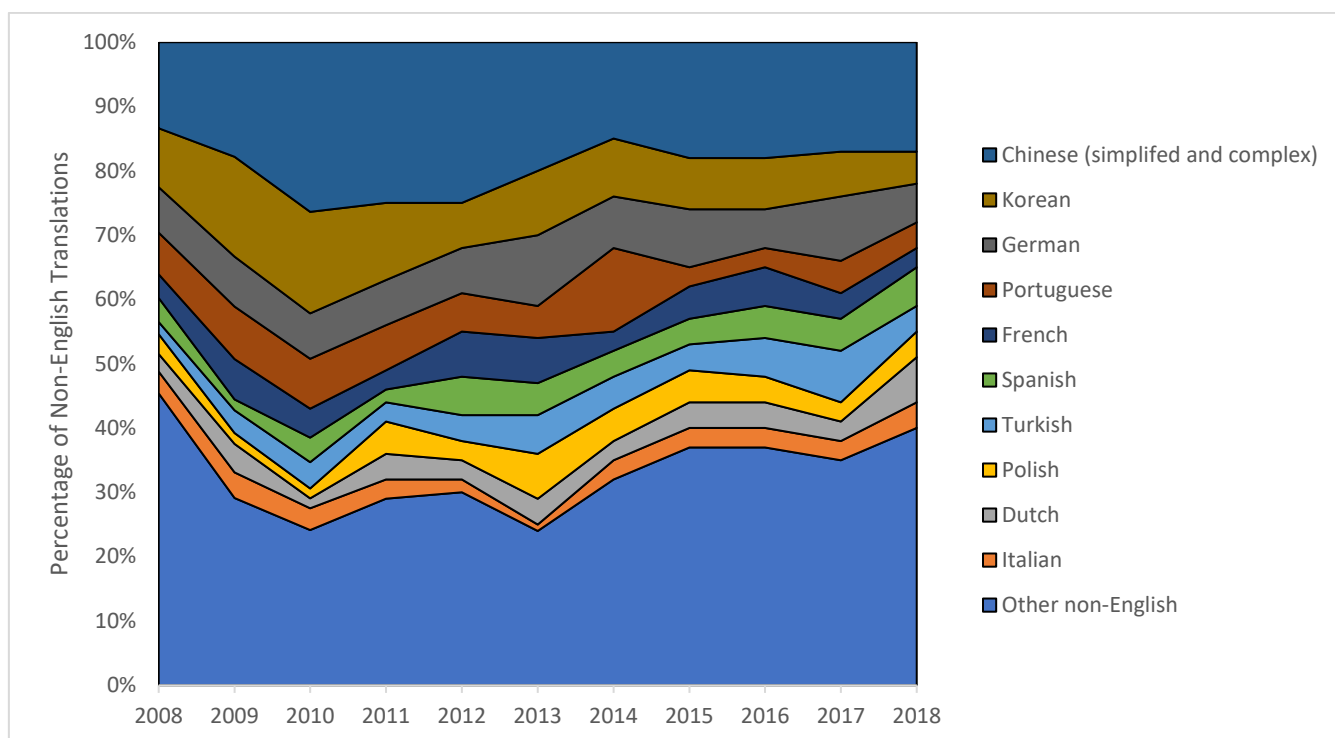
Figure 5 illustrates the shares over time of the top 10 non-English languages that appear most frequently in our sample. Chinese language (simplified and complex characters), coupled with Korean, dominate the percentage of translations in each year of the sample period. However, the increased percentage of non-English languages from outside the top 10 (labelled ‘other non-English’) in the past five years suggests diversification of translation languages in international rights sales deals. Such translations have increased from 24 percent of deals in 2013 to 40 percent of deals in 2018, indicating an increasing capacity for Australian rights sellers to develop new and existing markets.

²⁴ Note: picture books, middle grade, teen & YA have been aggregated due to the small number of titles in some categories.

Table 5: Percentage share of languages across all deals

Language	Total
English	19.6%
Chinese (simplified & complex)	13.7%
Korean	7.0%
German	5.5%
Portuguese	4.4%
French	3.5%
Turkish	3.3%
Spanish	2.8%
Polish	2.8%
Dutch	2.6%
Italian	2.2%
Czech	2.0%
Russian	1.9%
Japanese	1.5%
Slovenian	1.5%
Bahasa Indonesian	1.2%
Swedish	1.1%
Hungarian	1.0%
Norwegian	1.0%
Danish	0.8%
Greek	0.8%
Lithuanian	0.7%
Bulgarian	0.7%
Slovakian	0.7%
Romanian	0.7%
Catalan	0.6%
Hebrew	0.6%
Persian	0.5%
Other	4.4%
Not specified/world	10.6%

Figure 5: Percentage share of top 10 non-English languages over time



Deals by language and genre

Table 6 presents the percentage share of languages by genre for those with over 50 deals associated. Thirty-four percent of the English language deals involve adult non-fiction, followed by adult fiction (25 percent), middle grade titles (18 percent), picture books (17 percent) and teen & YA titles (8 percent). Over three-quarters of Chinese and Korean translations relate to middle grade and picture books, providing evidence of the strong and growing demand for titles aimed at younger readers from these large Asian markets. Overall, the distribution of genres for European language translations appears to be more uniform than for non-European nations. For example, the proportion of adult fiction translations is much lower in languages such as Bahasa Indonesian (7 percent) and Persian (2 percent). In the case studies, rights sellers discuss the investment that is needed on the part of an overseas rights buyer to find a readership for an Australian-authored book in their market. In addition to translation costs, these may include new illustrations, layout in formats preferred by the overseas market, printing, distribution and promotional support. Therefore, in some cases even a modest rights sales deal still reflects a broader financial commitment by an overseas rights buyer to making that book a success (commercially, critically or simply by reaching the intended readership) in a foreign market. The list of languages below indicates a broad range of commercial and cultural interest in Australian-authored books.

Table 6: Percentage share of languages by genre (languages with over 50 deals)

Language	Adult Fiction	Adult Non-Fiction	Middle Grade	Picture Book	Teen & YA
English	25%	34%	18%	17%	7%
Chinese (simplified and complex)	5%	17%	30%	46%	2%
Korean	5%	14%	20%	57%	4%
German	37%	24%	18%	9%	12%
Portuguese	12%	18%	51%	13%	6%
French	31%	17%	27%	18%	6%
Spanish	25%	19%	38%	13%	5%
Turkish	18%	10%	44%	19%	8%
Polish	26%	26%	33%	9%	6%
Dutch	22%	30%	35%	8%	5%
Italian	28%	28%	18%	18%	7%
Czech	26%	20%	42%	5%	7%
Russian	26%	35%	21%	11%	6%
Japanese	13%	24%	34%	26%	3%
Slovenian	12%	7%	42%	34%	7%
Bahasa Indonesian	7%	19%	10%	55%	8%
Swedish	19%	8%	58%	12%	3%
Hungarian	46%	24%	22%	3%	5%
Norwegian	39%	2%	36%	20%	3%
Danish	32%	13%	39%	14%	1%
Greek	49%	18%	20%	9%	4%
Lithuanian	29%	14%	51%	6%	0%
Bulgarian	52%	20%	17%	3%	8%
Slovakian	19%	13%	56%	5%	8%
Romanian	32%	28%	25%	10%	5%
Catalan	14%	0%	65%	14%	7%
Hebrew	39%	2%	28%	26%	5%
Persian	2%	0%	78%	20%	0%

Deals by language and respondent type

Table 7 presents the percentage share of languages by respondent type for languages with over 50 deals. The language profile of the deals secured by large publishers is the most diverse (59 unique languages). Agency deals involved 44 unique languages, and small and micro publishers, 29 and 27 languages, respectively.

As expected, given their size and resources, the majority of deals for most languages are secured by large publishers. Amongst the English language deals, the majority (71 percent) hail from large publishers, followed by agencies (17 percent), small publishers (8 percent) and micro publishers (4 percent). Other types of respondents show varying foci in terms of translation languages. Agency deals are relatively more focused on Chinese, Korean, German, and Dutch languages amongst the top ten, and Bahasa Indonesian and Swedish outside of the top ten. Small publishers are relatively more involved in Chinese and Korean deals. Micro publishers are strongly represented in several languages, in particular Greek, Hungarian, French, Danish and Spanish. Indeed,

micro publishers account for a higher percentage of translations than small publishers in 11 out of the 28 markets that have over 50 deals. This speaks to the intricate and complex nature of such deals and the important role that personal networks play in the sale of international rights. (The rights sellers in the case studies include discussion of the importance of personal networks in achieving rights deals. Ivor Indyk, publisher of Giramondo, a small publisher which specialises in literary works, examines their crucial role in relation to achieving translation deals for Giramondo’s list.)

Table 7: Percentage share of languages by respondent type (languages with over 50 deals)

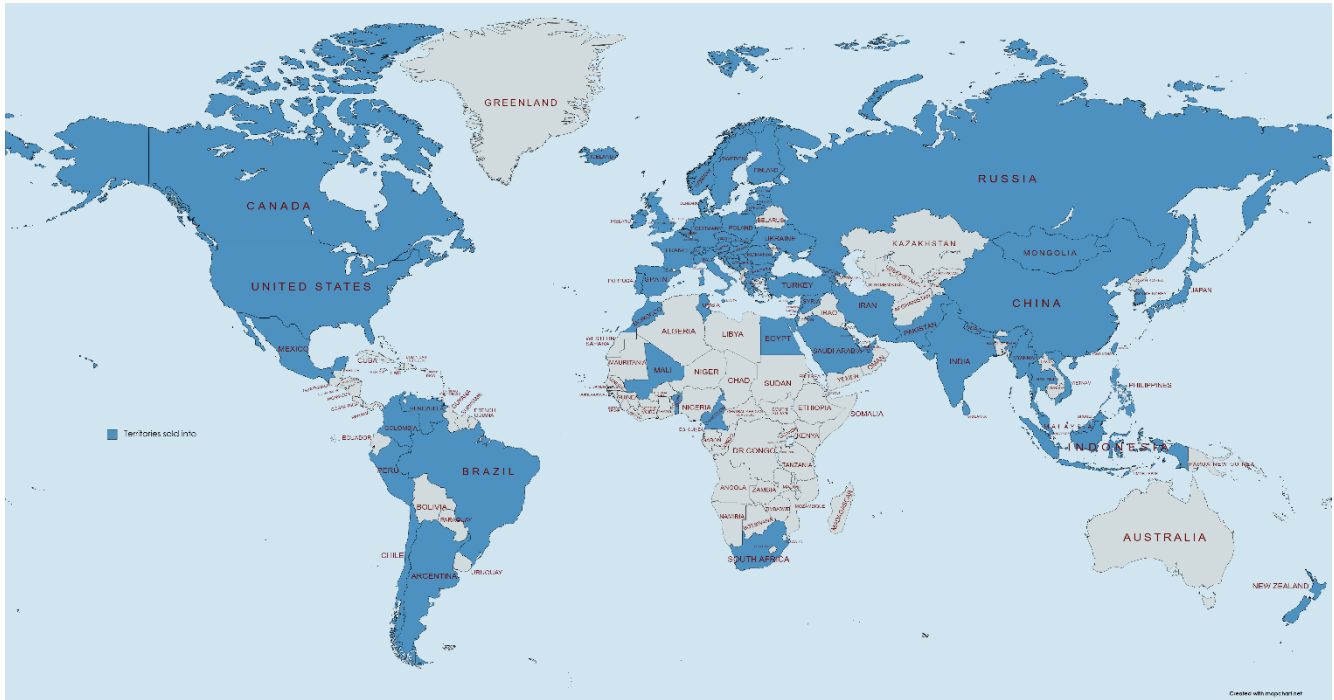
Language	Large	Small	Micro	Agency
English	71%	8%	4%	17%
Chinese (simplified and complex)	68%	5%	2%	26%
Korean	62%	6%	1%	30%
German	78%	5%	4%	12%
Portuguese	84%	1%	1%	13%
French	74%	3%	7%	16%
Spanish	94%	0%	6%	0%
Turkish	77%	5%	4%	13%
Polish	72%	6%	3%	18%
Dutch	74%	1%	2%	23%
Italian	74%	4%	5%	16%
Czech	80%	3%	2%	16%
Russian	73%	3%	4%	20%
Japanese	82%	5%	0%	13%
Slovenian	75%	4%	0%	20%
Bahasa Indonesian	48%	0%	1%	51%
Swedish	69%	1%	1%	29%
Hungarian	68%	4%	8%	20%
Norwegian	64%	4%	3%	29%
Danish	74%	1%	7%	18%
Greek	63%	3%	9%	25%
Lithuanian	84%	0%	3%	13%
Bulgarian	73%	0%	2%	25%
Slovakian	71%	6%	2%	21%
Romanian	67%	3%	0%	30%
Catalan	95%	0%	0%	5%
Hebrew	68%	0%	0%	32%
Persian	100%	0%	0%	0%

Deals by territory over time

Of the 9,315 international rights sales deals collected as part of the survey, 83.5 percent list a specific territory. The remaining 16.5 percent list broad groups of territories (such as world, Latin America, Europe, etc.) or do not specify a particular territory. A total of 92 unique territories were listed in the data. Figure 6 presents a world map depicting each of the specific, named territories that rights for Australian authored books have

been sold into by survey respondents over the sample period.

Figure 6: Map of rights sales to specific territories



Note: This figure only depicts deals to a specific named territory. Deals relating to broad groups of territories (such as world, Latin America, Europe, etc.) are not shown.

Table 8 presents the percentage share of territories across all deals in the sample. The prevalence of deals for broad groups of unspecified territories means that caution should be taken when making inferences regarding the most ‘popular’ territory. Nevertheless, the data reveals the importance of key markets. For instance, one in ten of all rights deals that specifies a territory relates to a Chinese deal. The USA, UK, and Canada, three key primarily English-language markets, follow China. Korea rounds out the top five most specified territories. As expected, there is a high correlation between the top languages and territories. For instance, Table 5 revealed that 4.4 percent of all translations were Portuguese. We therefore see strong representation from Brazil (3.9 percent) and Portugal (0.6 percent) in terms of specified territories.

Table 8: Percentage share of territories across all deals

Territory	% of deals
China	10.0%
USA	8.6%
UK	6.8%
Canada	5.9%
Korea	5.7%
Germany	5.0%
Brazil	3.9%
Spain	3.1%
Turkey	2.8%
France	2.8%
Poland	2.5%
Netherlands	2.4%
Italy	2.1%
Czech Republic	1.8%
Taiwan	1.7%
Russia	1.5%
Japan	1.3%
India	1.0%
Sweden	0.9%
Indonesia	0.9%
Slovenia	0.9%
Hungary	0.8%
Norway	0.8%
Denmark	0.7%
Greece	0.7%
Lithuania	0.6%
Portugal	0.6%
Israel	0.5%
Iran	0.5%
Slovakia	0.5%
Bulgaria	0.5%
Other	5.7%
Not specified/world	16.5%

To examine how the popularity of different territories changes over time, Table 9 shows the top ten most frequently specified territories for each year of the sample period. Again, we exclude deals relating to broad groups of territories (such as world, Latin America, Europe, etc.) for ease of interpretation. Since 2010, China has emerged as the dominant territory each year. The USA, UK and Germany make consistent appearances in the top ten, with some movement among other territories. In recent years, countries such as Turkey, Poland and Iran have emerged as key markets.

Table 9: Top Ten most frequently specified territories (yearly)

Rank	2008	2009	2010	2011	2012	2013
1	Korea	Korea	China	China	China	China
2	China	China	Korea	Germany	UK	UK
3	UK	Germany	Brazil	UK	Germany	Germany
4	Germany	UK	UK	Brazil	Spain	Korea
5	USA	Brazil	Germany	Netherlands	France	USA
6	Canada	USA	Spain	Korea	USA	Canada
7	Brazil	Canada	Mongolia	USA	Canada	Poland
8	Indonesia	Netherlands	USA	Taiwan	Korea	France
9	Spain	Taiwan	Canada	France	Brazil	Turkey
10	France	Indonesia	France	Poland	Netherlands	Brazil

Rank	2014	2015	2016	2017	2018
1	China	China	China	China	China
2	Brazil	USA	USA	UK	UK
3	Korea	UK	UK	Germany	USA
4	UK	Germany	Canada	USA	Spain
5	Germany	Turkey	Germany	Turkey	Germany
6	USA	Korea	Korea	Korea	Canada
7	Canada	France	Spain	Canada	Italy
8	Poland	Canada	Turkey	Iran	Korea
9	Turkey	Poland	France	Brazil	Netherlands
10	Spain	Netherlands	Netherlands	Czech Republic	Poland

Table 9 should be interpreted with caution. One way of interpreting this finding is that the territories listed above have been very important to Australian rights sellers during this timeframe. However, one must keep in mind that the rankings exclude combined territories (such as world, Latin America, etc.). The actual reach of Australian authored titles is much wider when such deals are factored in.

The inclusion of the UK in every year of the table is interesting, and there is some contrast with the challenges discussed in some of the case studies of selling rights to UK publishers with the exception of potential bestsellers (commercial fiction, for example). The researchers reviewed the data relating to UK rights sales and found that large publishers are responsible for a significant proportion of Australian rights sales (over three-quarters). There are several ways of interpreting this finding. One possibility is that these large publishers are more likely to publish bestsellers which are of interest to their UK counterparts (while bearing in mind that smaller publishers and literary agents have also successfully sold Australian books with bestseller potential to the UK). Another interpretation is that Australia's large multinational and independent publishers have established effective ways of communicating with their UK arm about books which may be of interest to them. In this case, they may be able to also effectively pitch books which have smaller commercial potential and which fill spaces in their UK counterpart's lists. Either way, this development represents enhanced Australian industry capacity in dealing with UK counterparts compared to the late 1980s and 1990s, as discussed by Juliet Rogers in her previous experience as Managing Director of Random House NZ and Australia (see the associated case study for further details).

Direct exports and co-editions

The survey also investigated the prevalence of direct exports as an alternative path to international rights sales for Australian authored titles. Direct exports are books that are supplied directly from publishers to fulfil orders in other countries. To ensure respondents were not overburdened by the survey, we only asked about direct exports for a single year (2018). Just under half of the respondents (48 percent) indicated that they directly exported titles during this year.

We then asked respondents who indicated that they had directly exported titles to rank the territories in order of income generated. The USA was ranked first, suggesting this is the most lucrative direct export market. This was followed by the UK, Canada, China, and India. All told, export markets appear to correlate closely with the territories associated with international rights sales for the single year in which information was collected. However, further research on direct exports would be required to make broader conclusions regarding this method of disseminating Australian-authored books.

As noted above, we also attempted to collect data on deals for co-editions during the sample period. Only four of our 31 respondents reported selling international rights using this method. Given the very small number of co-edition deals we collected as part of the survey, we were unable to perform any sort of robust analysis with regards to this method of rights selling.

Deals and authors

Table 10 shows the number of deals secured for each of the unique authors in the sample. Of the 1,792 authors listed in the deals reported, 44 percent secured only one deal; 46 percent, between two and ten deals; and nine percent secured between 11 and 50 deals. The top one percent (which consists of 20 authors) signed more than 50 deals during the sample period. In total these 20 authors account for over 23 percent of all deals, suggesting that the blockbuster phenomenon (where a relatively small number of individuals dominate the market in which they are engaged) is alive and well in the Australian book industry and the market for international rights sales.

Table 10: Number of deals per author

	No. of authors	Percentage
1 deal	793	44%
2-10 deals	827	46%
11-50 deals	152	9%
50+ deals	20	1%
<i>Total</i>	<i>1792</i>	<i>100%</i>

Table 11 presents the number of deals by gender. Female authors were responsible for more rights sales than males, with 52.6 percent of deals compared to 43.1 percent. (The 2015 survey of Australian authors found that female authors comprise approximately two-thirds, or 67 percent, of Australian book authors.) Mixed gender collaborations and titles written by organisations made up 3.4 percent of all rights sales.

Table 11: Number of deals by gender

	No. of deals	Percentage
Female	4899	52.6%
Male	4017	43.1%
Not specified	84	0.9%
Collaboration / organisation	315	3.4%
<i>Total</i>	<i>9315</i>	<i>100%</i>

Table 12 expands our analysis of the gender differences in rights deals by analysing variations across genres. We see that adult fiction titles are heavily skewed towards female writers, who account for two-thirds of all deals in this genre. On the other hand, adult non-fiction is dominated by male writers (albeit to a lesser extent). Looking at titles aimed at younger readers, we see a reasonable gender balance when it comes to middle grade titles. Picture books and teen & YA deals are again predominately written by female authors.

Table 12: Percentage share of genders by genre

	Adult fiction	Adult non-fiction	Picture book	Middle grade	Teen & YA
Female	66%	45%	50%	49%	59%
Male	33%	51%	39%	51%	41%
Not specified	1%	0%	1%	0%	0%
Collaboration / organisation	0%	3%	10%	0%	0%

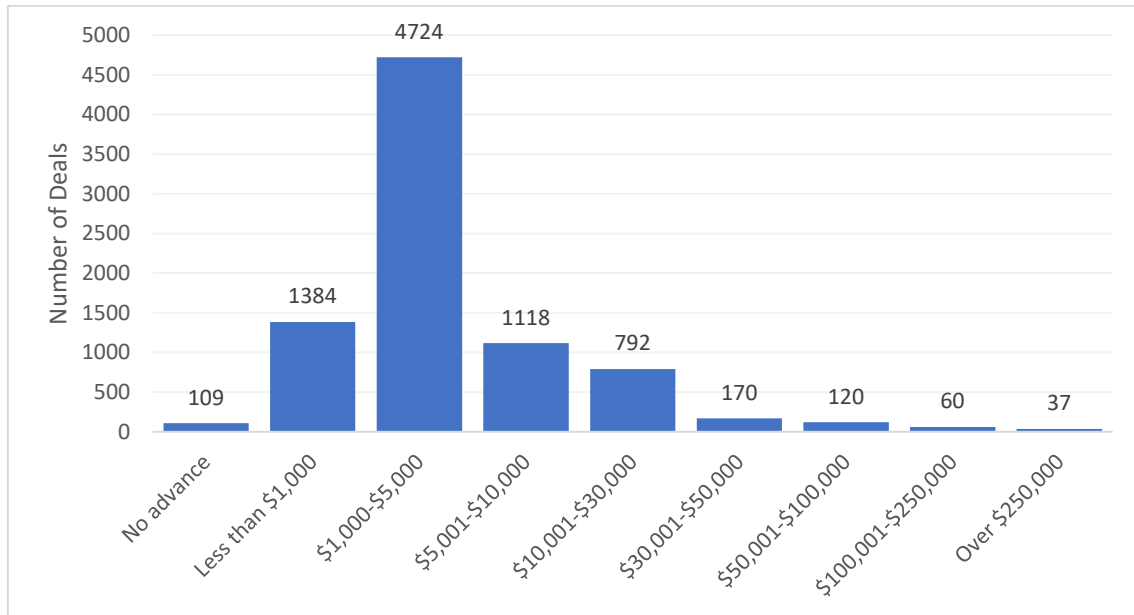
Size of advance

As discussed, advances form an important part of many deals for international rights. Indeed, 91 percent of the rights deals contained within our sample specify an advance amount. To ensure that the financial aspects of the deals collected in our survey remained confidential, we sought information on the size of advances in bracketed ranges. Figure 7 shows each of these ranges (from no advance to advances over \$250,000), along with the number of deals that fall within each category.

By taking the mid-points of the bracketed ranges, we find that the average size of advance is \$9,032 and the advance most frequently nominated is \$2,500. The right-skewed distribution of advance size indicates that a small percentage of authors receive considerably higher advances than others. This discovery further cements the blockbuster author phenomenon that we saw in our analysis of deals per author and title.

Using this data, we can also estimate the total amount of advances paid to Australian authors during the sample period. The highest—or upper bound—estimate is \$114.7 million. Using the more conservative mid-point estimate advances total \$83.6 million, while a lower bound estimate is in the region of \$52.4 million. Given the relatively low average levels of income received by Australian authors that have already been discussed in this report, international rights represent an important area of current and potential income for Australian authors.

Figure 7: Size of advance



Size of advance by respondent type

The size of advance by respondent type is presented in Table 13. Large publishers dominate deals under \$50,000, while literary agencies are responsible for the majority of the deals over this amount. It could be that authors with a book that has the potential to secure a \$50,000 advance on a rights sale deal are more likely to be represented by an agent, however large and small publishers are also responsible for a significant proportion of deals involve large advances over \$50,000 and higher. In the case studies, agents and publishers discuss how they decide who is best placed to secure the strongest deal for an author's book.

If we take the mid-point of the bracketed advance amounts, the average advances of deals signed by each respondent type are \$6,817 for large publishers; \$14,819 for small publishers; \$5,146 for micro publishers; and \$12,673 for agencies. The higher average advance amounts for small publishers and literary agents are driven by the relatively small number of deals that pay no advance or an advance under \$1,000 by these types of respondents. Therefore, these figures should be treated with caution and considered in the broader context of the mix of book genres and authors represented by literary agents and publishers of different sizes.

Table 13: Size of advance by respondent type

Size of advance	Percentage contribution			
	Micro	Small	Large	Agency
No advance	5%	5%	69%	22%
Less than \$1,000	3%	9%	67%	21%
\$1,000-\$5,000	4%	9%	64%	23%
\$5,001-\$10,000	4%	16%	58%	22%
\$10,001-\$30,000	1%	16%	54%	30%
\$30,001-\$50,000	3%	13%	59%	25%
\$50,001-\$100,000	0%	22%	34%	44%
\$100,001-\$250,000	3%	22%	30%	45%
Over \$250,000	0%	27%	30%	43%

Size of advance by genre

The size of advances by genres is presented in Table 14. The majority of deals for all genres are in the \$1,000 to \$5,000 range. Advances over \$100,000 are exclusively reserved for adult fiction deals. Adult non-fiction titles are most likely to have no advance, while 1 in 5 children's, teen & YA titles have an advance of less than \$1,000. Again, taking the mid-point of bracketed advance amounts, the average advances of deals signed by each genre are \$20,078 for adult fiction; \$7,538 for adult non-fiction; and \$4,734 for children's, teen & YA. However, once again, these figures should be treated with caution because each genre represents a broad range of titles and involves a diversity of rights sales markets which vary from large to very small in terms of capacity to pay an advance.

Table 14: Size of advance by genre

	Size of Advance				
	No advance	Less than \$1,000	\$1,000 - \$5,000	\$5,001 - \$10,000	\$10,001 - \$30,000
Adult fiction	1%	7%	44%	17%	14%
Adult non-fiction	3%	11%	46%	15%	9%
Children's, teen & YA	0%	20%	55%	9%	6%
All titles	1%	15%	51%	12%	9%

	\$30,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	Over \$250,000	Not specified
	Adult fiction	4%	3%	2%	2%
Adult non-fiction	2%	1%	0%	0%	12%
Children's, teen & YA	1%	1%	0%	0%	8%
All titles	2%	1%	1%	0%	9%

Table 15 presents the average advance per deal in the order of titles produced by an author. Note that for this analysis we first take the average advance amount (using the mid-point) across all deals for each title with a specified advance amount for an author's first appearance in the dataset. We then calculate the average advance amount across all deals for each title for an author's second appearance in the dataset, and so on for each

additional title. While an author’s first appearance in our dataset does not necessarily mean it is their first-ever deal, this method permits an aggregated analysis of how advance size changes based upon increasing levels of author success.

As expected, we see increasing average advances being paid to authors who have more than one title with international rights sales during the sample period. These returns to success are not, however, evenly distributed across genres. Adult fiction authors receive more than double their average advance amount for their second to fifth title. Adult fiction authors who go on to publish more than five titles see their average advance amount almost triple (from \$20,295 to \$58,337). Adult non-fiction writers, on the other hand, do not enjoy the same increases in average advances over their first five titles. Only when publishing more than 6 titles, do they begin to enjoy increased average advance amounts. However, these amounts are still considerably lower than equally prolific adult fiction authors. There appears to be decreasing average advance returns for children’s, teen & YA authors. Authors in these genres tend to be rewarded with lower average advance amounts as their number of titles increases. This effect is likely due to the success of these genres in smaller territories, which tend to have smaller advance amounts.

Table 15: Average advance per deal by number of titles and genre

	Average advance per deal			
	All deals	Adult fiction	Adult non-fiction	Children's, teen & YA
1st title	\$6,886	\$8,944	\$6,846	\$4,867
2nd - 5th title	\$10,109	\$20,295	\$6,061	\$3,972
6th - 10th title	\$25,736	\$58,377	\$15,164	\$3,668

Size of advance by gender

The size of advance by gender is presented in Table 16. Male authors receive a slightly larger number of deals with no advance. This is largely driven by the relatively large amount of adult non-fiction titles written by males, which have smaller advance amounts (as shown in Table 12). For all other bracketed advance amounts, females have a larger share of the deals. This gap is particularly prominent at the upper end of the advance spectrum. Well over half (57 percent) of superstar deals (over \$250,000) are signed by females. This is an intriguing observation given the prevalent gender pay gap amongst Australian artists reported in the previous literature.

Table 16: Size of advance by gender

Size of advance	Percentage contribution			
	Female	Male	Not specified	Collaboration / organisation
No advance	48%	50%	1%	2%
Less than \$1,000	49%	46%	0%	5%
\$1,000-\$5,000	50%	46%	0%	4%
\$5,001-\$10,000	55%	42%	1%	3%
\$10,001-\$30,000	57%	39%	1%	3%
\$30,001-\$50,000	61%	36%	1%	1%
\$50,001-\$100,000	55%	43%	2%	1%
\$100,001-\$250,000	58%	40%	2%	0%
Over \$250,000	57%	41%	0%	3%

Great care has been taken to deidentify the survey data, however based on discussions in the case studies, it may be that some genres in which female authors are particularly well-represented can also be the most lucrative for those few authors who are bestsellers, for example in commercial women's fiction, both contemporary and historical; and authors who are well-known in Australia but also authors whose primary markets are outside of Australia and New Zealand.

Rights Sales Experiences Survey: Principal results

The rights sales experience survey yielded a total of 39 responses. This is greater than the number of responses used in the analysis of the rights sales data above (where $n = 31$). This difference is due to some respondents being actively engaged in selling international rights but having no deals to report during the survey period of 2008-2018. As with the principal results associated with the rights deals, we must exercise caution when interpreting the results associated with the experiences survey. The “opt-in” nature of the survey, coupled with the lack of population data on which to perform such statistical tests for our results means care must be exercised in drawing more widely applicable conclusions from them. Nevertheless, the following analyses allow us to identify general patterns and views regarding rights selling experiences from our respondents, which are unlikely to be affected by these issues.²⁵

Staffing arrangements

The principal results presented in the previous section reveal the considerable success that Australian publishers and literary agents have had in securing rights deals, both in terms of the volume of deals and the size of advances secured for Australian authors. As shown in Table 17, this success comes even though over half of our respondents indicated that they did not currently employ dedicated rights sellers on an ongoing basis to oversee this area of their business activity.

Table 17: Percentage of organisations that currently employ dedicated rights sellers on an ongoing basis

	Dedicated rights seller
Yes	43
No	57
Total	100
<i>n</i>	39

As expected, organisations that employed dedicated rights sellers were predominately large publishers and literary agents. Among this group, the average full-time equivalent number of employees dedicated to selling rights was 1.9. 95 percent of the respondents who reported not having a dedicated rights seller indicated that rights sales were handled by an employee in a ‘mixed’ role, which typically centred around sales and editorial duties. The remaining 5 percent of respondents without dedicated rights sellers were small or independent operators, who handled rights sales themselves.

The survey uncovered a wealth of experience among rights sellers, regardless of their underlying rights selling role in an organisation. The median level of personal rights selling experience among respondents was between 11 and 20 years. As revealed in Table 18, over one in ten respondents had more than 20 years of experience with selling rights. Overall, these results confirm the notion that the selling of rights involves the development of a considerable stock of industry-specific human capital in the form of

²⁵ As noted in the methodology, literary agents were asked an additional set of specific questions relating to their professional practices and responses to industry changes. Given the small number of responses from this group, this information is incorporated directly into our discussion of the key findings and recommendations to ensure anonymity.

product knowledge and networks. The longevity of employees in such roles is also a testament to their dedication both to the book industry, and the authors they represent.

Table 18: Amount of rights selling experience: percentages within each group

Rights selling experience	
Less than 3 years	13
Between 3 and 10 years	34
Between 11 and 20 years	40
More than 20 years	13
Total	100
<i>n</i>	39

Developing rights sales

The survey investigated how rights sales are developed, with questions asking what book fairs and conduits were used by respondents. The effectiveness of each of the options presented was also investigated.

Table 19: Book fairs used to develop rights sales transactions: percentages within each size group and effectiveness bracket

Book fair	% of respondents using	Have used:			Have used: will not use again
		Important	no sales yet	Undecided	
Attendance at Frankfurt Book Fair	62	100	0	0	0
Attendance at Bologna Book Fair	38	100	0	0	0
Attendance at London Book Fair	27	86	0	14	0
Attendance at Shanghai International Children's Book Fair	19	100	0	0	0
Attendance at Beijing International Book Fair	12	100	0	0	0
Attendance at BookExpo America	8	100	0	0	0

Table 19 reveals that Frankfurt is found to be the most utilised rights sales channel in terms of book fairs. Given the event's status as the world's largest trade fair for books, it comes as no surprise that almost one-third of the respondents develop rights sales at this annual event. The Australian Publishers Association and the Australia Council provide support (in terms of logistics, collective stands, catalogues and the like) to publishers to attend a range of book fairs. This is likely to further increase the use of fairs' and their importance among respondents. Other general-interest book fairs (London Book Fair, Beijing International Book Fair and BookExpo America) appear to be less used by respondents. Given the considerable costs incurred by Australian publishers and literary agents in attending international events, it may be the case that the dominant rights selling strategy is to limit appearances to a single major event if a publisher's or agent's resources are limited. In the case studies, agents and publishers discuss their experiences at the book fairs and how they decide which fairs are most strategic for achieving rights sales. Not surprisingly, given their specialised focus on children's titles, the Bologna and Shanghai fairs are less utilised overall but children's publishers in the case studies discuss the importance of both these fairs.

The findings demonstrate that the overall importance of key international book fairs when it comes to developing rights sales is without question. Five out of the six fairs presented were deemed to be either moderately or extremely important by all respondents that utilised them. Importantly, all fairs yielded sales for those that attended them, and no respondents indicated that they would cease to attend fairs that they had used in the past.

In addition to book fairs, a wide variety of government and industry support designed to help develop rights sales is offered to Australian publishers and literary agents. Some of these initiatives are detailed below. Preliminary discussions with industry stakeholders, particularly the multinationals also revealed that formal and informal arrangements with overseas entities also play an important role in the development of rights sales. Table 20 presents a list of these conduits, along with their utilisation among respondents and an assessment of effectiveness.

Table 20: Conduits used to develop rights sales transactions: percentages within each size group and effectiveness bracket

Conduit	% of respondents	Have used:			Have used: will not use again
	using	Important	no sales yet	Undecided	
The Australia Council's Visiting International Publishers (VIPs) program	88	87	9	4	0
Formal sub agency arrangements with overseas rights agents	77	100	0	0	0
Searching online for agents/publishers	69	95	5	0	0
Informal relationships with likeminded publishers overseas	62	87	13	0	0
Literary scouts	54	100	0	0	0
Australia Council-led market delegations	42	100	0	0	0
Rights sales trips to specific markets	42	100	0	0	0
<i>Books+Publishing's</i> annual 'Think Australian' edition	27	43	57	0	0
Internet-based rights marketplaces	19	100	0	0	0
Formal relationships with sister companies overseas	19	100	0	0	0
Australian Government Export Market Development Grants scheme	12	100	0	0	0

The Australia Council's Visiting International Publishers (VIPs) program is found to be the most utilised conduit through which to develop rights sales. 88 percent of respondents indicated that they have utilised VIPs to develop rights sales. An array of formal and informal conduits is also found to be a prominent way to develop rights sales. Three-quarters of respondents utilised formal sub-agency (co-agency) arrangements with overseas rights agents as part of their rights selling strategy. Informal relationships with overseas publishers and online searches were also found to be critical, further highlighting the importance of long-term networking relationships. Over half of all respondents worked with literary scouts.

As was the case with book fairs, respondents generally view the conduits they have used in the past favourably. Ten out of the eleven avenues to develop rights sales are deemed to be either moderately or extremely important by at least 87 percent of respondents that utilised them. Again, no respondents indicated that they would cease to use any of the conduits that they had used in the past, highlighting perhaps, the importance of all conduits working in tandem with each other. The zero value for conduits is a prompt for consideration as to why this might be the case. Overall, the number of rights sellers in

Australia is relatively small.²⁶ The case studies reveal a great deal of informal information exchange and informal mentoring in rights sales occurs in the Australian book industry. Agents and publishers discuss the industry dynamic in which they are both collaborators to support the Australian book industry overseas and potential commercial competitors in the domestic industry. It could be that this shared experience assists rights sellers to weigh up the costs and benefits of investing in various rights sales strategies, especially those which involve a substantial outlay of money or time. Publishers associations including the APA and the SPN also include panel sessions on international rights sales opportunities and strategies at their annual conferences. The survey findings appear to show that the support strategies currently in place are perceived by rights sellers to offer substantial benefits.

Perceptions of success and future prospects

The survey also aimed to ascertain rights sellers' perceptions of success and their views regarding prospects for the future of rights selling. Overall, 63 percent of respondents indicated that they sensed an increase in international interest in Australian authored books over the 10-year sample period (2008-2018). Twenty-two percent did not sense an increase in interest, while the remaining 15 percent were unsure.

We asked respondents who sensed an increase in international interest in Australian authored books to suggest reasons why they thought this was the case. Table 21 presents a list of these reasons, in ranked average order of importance, along with the percentage of respondents who indicated the reason was important. Greater awareness of the quality of Australian authors from overseas publishers and agents was both the most selected and highest-ranked reason. Greater awareness of the quality of Australian authors from overseas readers was chosen by 59 percent of respondents. However, this fact was not deemed to be as important as other factors. The emergence of blockbuster Australian titles during the sample period and subsequent interest from publishers and agents were both highly ranked and often selected, indicating that this was a key driver of positive sentiment for respondents. While educational appeal was only selected as a reason for increased interest by a small number of respondents, it was deemed to be important for those who chose it. Reciprocal rights relationships were not found to be a key driver of positive sentiment, both in terms of selection percentage and ranked order of importance.

²⁶ Less than 100 in an industry which employs over 3700 people (Chapman, 2020).

Table 21: Reasons for the increased interest in Australian authored books: ranked by average order of importance with percentages within each group

	Order of Importance	% of respondents
Greater awareness of the quality of Australian authors from overseas publishers and agents	1	82
Australian best-selling books have generated increased interest from publishers and agents	2	71
I have successfully built relationships with like-minded agents and publishers overseas	3	41
Educational appeal	4	6
Ability to connect with potential rights buyers online	5	41
The higher profile of successful books and authors overseas amongst readers	6	59
The ability of Australian rights sellers to attend book fairs	7	71
Improved Australian presence at international trade fairs	8	35
Australian writers are writing books which fit with international trends	9	47
Strength of my professional international relationships in the industry	10	53
Increased commercial appeal of the books in overseas territories	11	59
Greater awareness of the quality of Australian authors from overseas readers	12	59
My ability to buy the rights to overseas titles (reciprocal relationships)	13	6
Ability of international readers to engage with Australian authors through social media	14	29
Positive reviews of Australian books overseas (includes reader reviews and critical reviews)	15	35
My improved ability to sell international rights effectively	16	29

Next, we examined how rights sellers perceive their own level of success. Table 22 reveals that although 96 percent of respondents regarded their organisations experience in selling rights as at least a little successful, only eight percent consider there is no scope to improve their success. 84 percent of rights sellers believe there is scope to expand on their current success.

Table 22: Success in selling international rights to Australian books to date: percentages within each group

	% of respondents
Very successful with no scope to improve	8
Very successful with scope to improve	41
Moderately successful with no scope to improve	4
Moderately successful with scope to improve	32
A little successful with no scope to improve	0
A little successful with scope to improve	11
Unsuccessful with no scope to improve	0
Unsuccessful with scope to improve	4

Table 23 reveals similar positive sentiment when it comes to being equipped to sell rights in the future. Again, 96 percent of respondents regarded their organisation as being at least a little equipped to sell rights to Australian books in the future. While over half of all respondents suggesting that they are very well equipped. While this positive sentiment bodes well for future rights sales success it is important to note that the vast majority (93 percent) of respondents believe there is scope for their organisations to improve their rights selling abilities in the future.

Table 23: How well equipped are organisations to sell international rights to Australian books in the future: percentages within each group

	% of respondents
Very well-equipped with no scope to improve	7
Very well-equipped with scope to improve	48
Moderately well-equipped with no scope to improve	0
Moderately well-equipped with scope to improve	30
A little well-equipped with no scope to improve	0
A little well-equipped with scope to improve	11
Not well-equipped with no scope to improve	0
Not well-equipped with scope to improve	4

Next, we turned our attention to examining what can be done to strengthen the industry's capacity to sell rights.

Strengthening capacity

We investigated issues associated with rights sales capacity strengthening with two key questions. First, we asked what current obstacles rights sellers face regarding expanding their rights sales. Table 24 indicates that there is no single unifying obstacle. Given the heterogeneous nature of the survey respondents, this is not surprising. Rather, we see an array of challenges that rights sellers must negotiate to secure deals. Competition from overseas markets was selected by over half of the respondents and ranked as the most important obstacle. The most selected obstacle relates to the distance from other markets, suggesting that the 'tyranny of distance' may be an impediment when it comes to networking and securing deals. Obstacles related to research, record keeping and knowledge about how to use rights sales resources effectively were generally regarded as the least important factors.

Table 24: current obstacles faced by rights sellers in regards to expanding rights sales: ranked by average order of importance with percentages within each group

	Order of importance	% of respondents
The number of titles in overseas markets which compete with my lists	1	56
Type of work published (i.e. locally focused)	2	41
Distance from other markets	3	59
Competition from other publishers/literary agencies	4	44
Changing international trends running counter to my lists	5	15
Difficulties in identifying and/or making connections	6	41
Difficulty attracting interest from overseas publishers and agents in my lists	7	41
Lack of international networks with publishers and agents	8	30
Insufficient support from external bodies	9	26
Cost of international author tours to promote books	10	37
Cost of translation	11	41
Delays in tax office certification	12	33
Insufficient support from your organisation	13	11
Lack of regular, ongoing research on rights sales to inform decisions	14	30
Limited knowledge about how to use rights sales resources effectively	15	15
Insufficient rights sales record keeping and management systems	16	15

With these obstacles in mind, respondents were then asked to detail what rights sellers require to strengthen their ability to sell rights in the future. Table 25 presents a list of the proposed factors. Increased capacity to build and strengthen international networks emerged as a key consideration. Over 80 percent of respondents chose this issue, and it was ranked as the most important consideration. As we have seen in previous questions, issues relating to travel and the distance to other markets appear to be crucial areas where support is needed. Half of the respondents would like to see increased support for agents and rights sellers to attend international trade fairs and more industry delegations to specific territories. On a similar note, increased funding for Australian authors to promote books in international markets was also deemed to be an important future consideration. Further explanation about how these initiatives lead to rights sales in practice is found in the case studies. Further, almost half (48 percent) of respondents highlighted the need for more effective rights sales record-keeping tools. This is consistent with discussion in the case studies about the benefits of rights sales software. This could be in the form of customised Excel spreadsheet templates or specialised rights sales software. In 2020, Nerrilee Weir, the rights sales manager for Penguin-Random House and an advisor to this project, presented an online seminar on rights sales record-keeping hosted by the Australian Publishers Association. While agents and rights sellers are focussed on the task at hand-securing the rights sale, they are also aware of the need for rigorous record-keeping to ensure that the deals are effectively contracted, the advances due are paid, and that the author’s share of that income ultimately flows through to them. Publishers and agents with a longstanding history of success in rights sales may be more likely to have established record-keeping systems and the response demonstrates a willingness across the industry to learn from best practices.

Table 25: what do rights sellers need to strengthen their ability to sell rights in the future: ranked by average order of importance with percentages within each group

	Order of importance	% of respondents
Capacity to build/strengthen my international networks	1	81
Learn how to identify the publishers/agents who might be interested in my lists	2	48
Support for agents/rights sellers to attend international trade fairs	3	59
More industry delegations to specific territories	4	56
More time in addition to my other responsibilities	5	56
Increase in the number of dedicated rights sales employees at my organisation	6	37
Increased funding for Australian authors to promote books in international markets	7	52
Improved training programs	8	30
More effective rights sales record-keeping tools	9	48
Learn how to pitch my titles more effectively	10	33
Increased investment in new technologies that change the way rights are sold	11	41

Digital transformation

Digitisation has transformed the way books are produced and consumed. There exists a growing literature examining the effect of the digital transition in the book industry with regards to supply chain issues, the emergence of self-publishing, the adoption of ebooks, audiobooks and the like. However, little is known about rights sellers' attitudes towards the adoption of digital innovations in their day-to-day activities. The onset of COVID-19 and the subsequent closure of Australia's international borders (resulting in many book fairs moving online) make such considerations even more timely.

We began by investigating overall attitudes towards the importance of face-to-face contact when conducting rights sale negotiations. As revealed in Table 26, all respondents placed a high value on in-person networking. It is important to note that many of these responses were gathered before events such as the Frankfurt Book Fair were moved online in late 2020. However, the rights sellers in the case studies emphasised the importance of face-to-meeting meetings which enables them to gauge whether they could do business based on shared values and ethics, reading tastes and publishing lists, and market opportunities. These face-to-face meetings, often accompanied by socialising after hours at book fairs, became the basis for friendships in many cases and provided a foundation for maintaining business interactions online in between book fairs. It is not clear whether it is possible to build the same depth of personal networks which facilitate rights sales deals through remote communication alone. It remains to be seen whether such strong sentiment against online interactions has been softened at all by the forced exposure to such methods as a result of the pandemic: it is also possible that the experiences of 2020 have reinforced the effectiveness of face-to-face meetings in building a foundation for long-term international rights sales networks.

Table 26: The importance of face-to-face contact when conducting rights sale negotiations: percentages within each group

	% of respondents
Very Important	74
Moderately Important	26
Not at all important	0

When developing this project, we sought feedback from industry stakeholders regarding potential changes to existing models of rights selling. The two key developments that dominated such discussions related to the idea of a national database of Australian titles which lists the international rights sold and available, and the potential for crypto technologies such as blockchain to create a new rights ecosystem. Respondents were therefore asked to evaluate the following statements:

It has been suggested that a national database of Australian titles which lists the international rights sold and rights available would assist in securing sales and strengthening the processes involved in selling international rights to Australian books. Such an initiative would be designed and run in consultation with the Australian book industry. What is your view?

It has been suggested that crypto technologies such as blockchain could create a new ecosystem through which rights could be bought and sold. What is your view?

Table 27 presents the outcomes of these evaluations on a 5-point scale. Looking first at attitudes towards the adoption of a national database of Australian titles, we see that 70 percent of respondents either agree or strongly agree with this proposition. It should be noted, however, that almost one in five respondents were either unsure or needed more detail regarding this proposition. Separately to this research and in parallel to the inclusion of this question about a rights database in the survey questionnaire, the Australian Publishers Association developed an initiative which was launched in late 2020.

The Australian Publishers Association (APA) developed the Books from Australia website (www.booksfromaustralia.com) to promote the Australian publishing sector to the world after the Frankfurt and Bologna 2021 book fairs were cancelled as in-person events and moved online. Developed as a central platform to boost the profile of Australian titles, and to connect those looking to buy and sell international rights, Books From Australia aimed to be an “outward promotional push rather than a platform where business is actually done” according to Cat Colwell, APA TitlePage & Supply Chain Manager. The APA’s rationale for its development was to deliver value to publishers over an estimated 12-month period while rights trading occurred primarily online, however, the APA intends that Books from Australia will continue to offer value to publishers as a supporting tool alongside the recommencement of in-person book fairs.

Cat Colwell observed that relationships between individual rights sellers remain critical to achieving international deals in the majority of agreements. In her experience, publishers have informally reported limited advantage from the many digital rights platforms, including platforms developed with particular book fairs such as Frankfurt

and Bologna, so this aspect of international trade is still developing. The APA is also examining a number of other possible initiatives to assist the industry to upskill and build capacity in relation to rights selling: these were confidential at the time of the finalisation of this report.

In contrast, the potential creation of new rights sales ecosystems through crypto technologies such as blockchain is not yet well understood by rights sellers. Seventy percent of respondents were either unsure or need more detail regarding this proposition. Only 16 percent were keen to embrace such an innovation, while the remaining 14 percent of respondents either disagreed or strongly disagreed that it could create a new ecosystem. Given the lack of comparable innovations in the book industry and other creative sectors, this uncertainty is not unexpected.

Table 27: Attitudes towards the adoption of a national database and crypto technologies: percentages within each group

	National database of Australian titles	Crypto technologies
Strongly agree	22	4
Agree	48	12
Unsure / more detail required	19	70
Disagree	7	7
Strongly disagree	4	7

Placing the findings in context

How did Australia's success in international rights sales develop?

One unexpected finding from this research project was the relevantly recent development of the Australian book industry's onshore capability to sell international rights to Australian-authored books on a consistent and sustained basis. Although this report focuses on rights sales from 2008-2018, the case studies point to some key developments during the decades prior which made the later sustained achievements possible. A scholarly study falls outside the scope of this project and the following broader context is meant as an interim comment only.

During the 1970s and 1980s, a number of Australian books became bestsellers in the US and/or the UK. These ranged from non-fiction to fiction, with notable examples including *The Thorn Birds* by Colleen McCulloch in the 1970s, and in the 1980s Robert Hughes' *The Fatal Shore*, books by Bryce Courtenay, Germaine Greer, and Clive James. It has been suggested that *Songlines* by Bruce Chatwin was also influential even though Chatwin was British (and the book is considered to have substantial weaknesses). As noted earlier in the report, Australian books had achieved bestseller status in the UK and USA since the colonial era, but this time the success of Australian books occurred in context with other important factors, discussed next.

The 1970s, 1980s and 1990s also saw a flourishing of Australian cinema, with films including *Picnic at Hanging Rock*, *The Chant of Jimmy Blacksmith*, *My Brilliant Career*, *Mad Max*, *Crocodile Dundee*, *Strictly Ballroom* and *Muriel's Wedding*. Former literary agent Mary Cunnane reflects, "Overseas moviegoers were seeing Australia—in various forms—on screen. This would have had an effect, I'm sure, both in terms of influencing the people—agents and publishers—who acquire books overseas and those who buy and read them."

A shift also occurred in attitudes towards Australian publishers within the sector. The end of the Traditional Market Agreement in 1976, under which Australia was deemed part of UK publishing markets, opened up opportunities for Australian publishers to obtain rights directly from authors and their agents to publish in Australia (with UK rights acquired separately), and also to sell rights to Australian books directly to the USA market. Craig Munro, inaugural fiction editor and later managing publisher at the University of Queensland Press (UQP), recalls debate at the 1986 Adelaide Festival's Writers' Week

That year's Writers' Week was notable also for a spirited panel session about whether Australian fiction should be originated from Australia or, as it often had been in the past, from London. David Malouf's publisher at Chatto & Windus, the Australian expat Carmen Callil, put the British case, while Laurie Muller put the independent Aussie case. When *The Sydney Morning Herald* published a feature on this topic, it also included the comments of two writers. Helen Garner said simply, 'I want my books to come out first in Australia.' Peter Carey said that he supported Australian publishing 'by making sure that an Australian publisher can publish my work here and thereby make a profit'. (Munro 2015, p. 167)

Munro recounts changes that followed the end of the Traditional Market Agreement in relation to UQP's negotiations over rights to publish Peter Carey's works, concluding, "I was... pleased, and relieved, that Illywhacker [published in 1985] was the last of Peter Carey's novels for which UQP would be required to go, cap in hand, to Faber for

the Australian rights. In future, we'd be dealing directly with his agent" (Munro 2015, p. 169).

In the 1990s, a number of Australian literary authors achieved critical recognition in the UK. This included publication by respected UK literary presses and praise from respected UK literary critics. Some of these authors were not recognised or positioned as Australian authors and others were. Collectively, their critical success contributed to a recognition that Australia was developing its own literary authors. Early examples include Tom Keneally, Shirley Hazzard, Rodney Hall, David Malouf, Helen Garner, Peter Carey and Tim Winton.

These developments were accompanied by onshore growth in the Australian book industry's capability in international rights sales. Early pioneers in international rights sales included Louise Adler, Greg Bain, Madonna Duffy, Rosie Fitzgibbon, Michael Heyward, Ivor Indyk, Airlie Lawson, Peg McColl, Angela Namoi, D'Arcy Randall, Henry Rosenbloom, Frank Thompson, Meryl Yule, Nerrilee Weir and Terri-Ann White. Examples of agents include Margaret Connolly, Tim Curnow, Mary Cunnane, Jenny Darling, Sheila Drummond, Debbie Golvan, Jill Hickson, Fiona Inglis, Caroline Lurie, Barbara Mobbs and Lyn Tranter.

Cunnane, from her perspective as a former senior editor in the USA and UK, and in the US as a literary agent, observes another key development. In her experience,

you had both to sell and buy rights sales especially English-language ones to the UK and the US to really be in the game. Historically ANZ [Australia New Zealand] was considered part of a British rights deal if a US publisher sold rights to a UK one. The UK publisher considered ANZ merely an export sales market. They shipped some copies down here to be distributed, not actually published. It wasn't until the mid to late 1990s that US publishers—and agents—began to realize that if they broke off ANZ and sold those rights separately (much to the annoyance of the Brits), they could do better. The Australian publishers who began to buy rights vigorously, e.g. Text and Scribe were also the people in London and New York that editors started to buy from.

The Australia Council established the Visiting International Publishers program (VIPs) in 1998, and the Australian Literary Agents' Association was formed in 2003.

Nerrilee Weir suggested that there has also been a change in the aspirations of Australian authors. This is a complex area for scholarly discussion because from the colonial period onwards Australian authors have had aspirations for their work to be published overseas, notably in the UK but also with notable success in the US. However, it is possible that the development of a more internationally connected Australian industry has also been accompanied by Australian writers who, due to easier access to global cultures through digital media, have had a different type of access to writing for international as well as Australian readerships.

Less is known about the industry pathway to the overseas success of Australian children's books, building on the increasing number of Australian-authored children's books published from the 1970s. In recent decades Australian children's authors have travelled internationally, often without international readers (and some acquiring publishers) ever recognising that they were Australian. Examples of rights sales successes include picture books by Pamela Allen, Jackie French, Graeme Base, Aaron Blabey to the category-defying work of Shaun Tan; middle grade series by John Flanagan, Morris Gleitzman, Andy Griffiths and Terry Denton, and teen and young

adult authors such as Simone Howell, Margo Lanagan, Melina Marchetta and Markus Zusak.

To summarise, from the late 1980s onwards a number of developments made possible a potentially enduring platform for international rights sales. These include an increase in Australian industry capability to negotiate rights sales (through the growth of Australian literary agents and publishers who learned this expertise overseas, through mentoring, or through trial and error), the increasing willingness of Australian authors with international reputations to grant rights to Australian publishers and choose Australian agents to represent their interests, and the gradual willingness of US, UK and other overseas publishers to receive pitches and to acquire rights from Australians.

A related development is the capacity for Australian arms of multinational publishers and rights sellers to pitch titles with overseas sales potential to their head office or other parts of their publishing organisation. Further on in the case studies, Juliet Rogers discusses her experience as CEO of Random House Australia and that at the time “There was no corporate mechanism for rights from ANZ to be acquired by the parent company.” Now there are established internal channels for Australian executives to approach colleagues in the arms of overseas affiliates. (The receptiveness to pitches may vary: that is outside the scope of this study.)

In brief, drawing from the case studies, key changes in the Australian book industry from the 1990s to 2021 include the following:

The 1990s

- In the 1990s, there were no established mechanisms in some of Australia’s largest multinational publishers to refer an Australian manuscript with international sales potential to their UK or UK office to explore interest in international rights sales.
- There was initially little interest among UK publishers in publishing Australian literary books.
- Australia was not seen as a source of potential international bestsellers in fiction, non-fiction or children’s books.
- Few Australian publishers or agents based in Australia had much experience in selling international rights to Australian books, although a number of Australians were gaining experience as editors, rights sellers and other roles in the UK and US book industry which they would later bring back to the Australian industry.
- Such arrangements as there were between UK literary agencies and Australian literary agencies at the time would later be changed and improved to give UK literary agents greater incentives to sell the rights to Australian books in the UK and to European translation territories. That is, the arrangements and incentives between Australian and UK literary agents in the 1990s had scope for improvement.
- It was not common for Australian authors whose books sold internationally to grant the rights to Australian agents or publishers to sell. Rather, Australian authors dealt directly with US or UK publishers or agents.
- Pitches and submissions were made using fax and post in addition to in person meetings at book fairs and industry gatherings. Australia’s lack of geographic

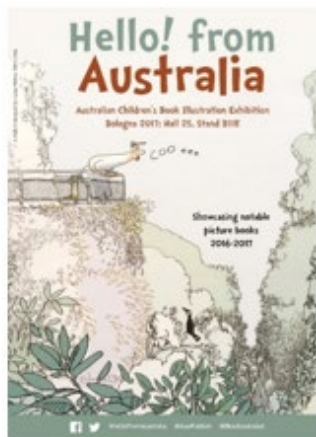
proximity to the US and UK and the prevailing technology were factors that made it difficult to capture the attention of key decision makers.

2021

- The Australian arms of multinational publishers have established channels and networks to pursue rights sales of Australian books with other arms of their companies, including the US and UK (the strength and effectiveness of these channels vary from publisher to publisher).
- Australia is viewed as a potential source of bestselling genre fiction in particular, although it must be noted that the international market for rights sales remains highly competitive. There are established relationships by publishers and agents in place to pursue opportunities to sell rights to Australian children's, adult non-fiction and literary fiction also.
- The Australian book industry now has an established infrastructure of literary agents and publishers with international rights sales experience and overseas networks which have been built up over the last three decades. In addition to experienced figures with decades of experience, the rights selling landscape of 2020 is populated by an emerging group of rights sellers at literary agencies and publishing houses.
- Australian literary agents and rights sellers have relationships in place with US and UK literary agents to pursue rights sales for US, UK, other English language and arrangements in place with co-agents to reach the translation markets.
- It is now reasonably common for Australian authors to choose Australian literary agents to represent their international rights or grant them to publishers to pursue sales opportunities overseas.
- Pitches and submissions are made using email, communication occurs on social media and other digital media, in addition to in person meetings at book fairs and industry gatherings. Australia's lack of geographic proximity to the US and UK is still a factor which makes capturing the attention of key decision makers difficult but making submissions is faster and easier if the initial in-person relationship has been established.

These changes must be considered in the context of government and industry-funded initiatives including the Australia Council's Visiting International Publishers (VIPs) program which also funds Australian delegations on overseas rights sales trips to key markets, Copyright Agency-funded international fellowships for Australian editors and publishers, the Hello Australia! Promotions at the Bologna Children's Book Fair, and the 'Think Australian' industry overviews prepared by *Books+Publishing* "aimed at an international audience of publishers, rights sellers, scouts, literary agents, and film and TV agents".

Covers of Australian children's book catalogues prepared for the Bologna Children's Book Fair (the leading international fair for children's books) are shown below.



Other examples of industry capability development include collaboration between the Australian Society of Authors, the Australian Literary Agents' Association and the Small Press Network to improve template contracts between authors and agents or publishers in order for Australian authors to better understand what rights they are granting where. The Australian Publishers Association organises a joint stand for key book fairs such as the London Book Fair and the Frankfurt Book Fair, with government funding support. The Small Press Network annual conference includes market reports from key international trade fairs, a panel discussion with tips about rights sales and introductory sessions on copyright and intellectual property.

Interviewees reported increasing informal collaboration within the Australian industry to build capacity. As noted earlier, there is an informal network of Australian international rights sellers and agents who are increasingly collegial and supportive (while also in many ways domestic competitors). Australian rights sellers may contact each other for a 'reference' for a publisher they haven't worked with before, and an increasing number of seminars are presented by Australian rights sellers and agents to Australian rights sellers and agents aimed at developing their skills.

Key advocates for Australian books overseas

Overseas-based advocates play key roles in helping Australian books get published internationally. These can be agents (such as Dan Lazar in New York), publishers (such as Judith Curr in New York), critics, academics and diplomats. They can provide opportunities by doing deals directly as agents or publishers, by reviewing the books in influential outlets, by writing scholarly articles about the books and/or including them on university curricula, and by using diplomatic networks to promote Australian books and authors.

It is difficult to capture the economic and cultural value that these advocates contribute but based on the interviews for this research it is very significant. Dan Lazar, an agent at Writers House LLC, was named repeatedly in case study interviews as a key agent who had successfully pitched Australian-authored books in US and secured deals. Judith Curr was also named often. An ex-pat Australian who has worked in the New York book publishing industry in senior positions at HarperVia (HarperCollins) and Atria (Simon and Schuster), Curr has published and championed a large number of Australian authors in the US market.

Literary publishers may champion an Australian author and publish their work either over a long timeframe or to bring it to critical attention. Ivor Indyk spoke about the role of Andreas Campomar in the UK and Judith Curr in New York in getting publication deals for *The Swan Book* and *Carpentaria* by Alexis Wright; and Stefan Tobler for publishing Gerald Murnane's books. Christos Tsiolkas and Tim Winton were also given as examples of literary writers who have a strongly committed publisher overseas.²⁷

Indyk also discussed the role that academic and author Nicholas Jose played in the Australian embassy in China, in raising the profile of Australian books and setting up institutes for the study of Australian literature in Chinese universities. Jose was also influential in promoting opportunities for the discussion of Australian literature in South American countries. Indyk also discussed the importance of European literary scholars who included literary books published by Giramondo on the European university curriculum. Nicholas Birns, a US literary scholar and former editor of *Antipodes: A Global Journal of Australian/NZ Literature*, is another influential figure in relation to Australian literature, based at New York University.

Other key advocates can include book bloggers. Kylie Scott's romance books were endorsed by a US blogger who was so influential that she was referred to in the industry as a "kingmaker". This endorsement led to tens of thousands of sales in the US. Scott's US sales then made her a more attractive proposition for a US agent to take her on as a client.

These advocates operate in a range of roles and as part of networks of advocates for books and literature from a range of countries and across a range of genres. They play important roles as influencers, gatekeepers and dealmakers.

Debate about strategies for overseas sales

The rights sellers and agents interviewed for this research discussed different views about strategies to maximise international rights sales. One common—but not uniform—strategy is to achieve a US rights sale first and then to use that as a platform to build confidence on the part of rights buyers in other territories. There was also a perception that the first translation deal for a book can give rights buyers in other language territories more confidence to acquire translation rights to a title.

Significance of awards

The Booker Prize (awarded by a panel based in the UK) is known in the English language book industry as the most significant literary award, and the most strongly associated with significantly increasing the sales of winning titles. The Crime Writers' Association's Gold Dagger, also a British award, is also associated and is also believed to increase sales. Australia has a large number of national and state-based literary awards.

Three Australian literary awards in particular are associated with increased interest from overseas rights buyers. They are the Miles Franklin award for "a novel which is of the highest literary merit and presents Australian life in any of its phases", the Stella Prize for Australian women's (cis, trans, and non-binary inclusive) fiction and non-fiction writing that is excellent, original and engaging, and the Prime Minister's Literary

²⁷ The term "publisher" is used in the industry as a shorthand for publishing house; it might also apply to an individual in a senior acquiring position (it may, or may not be, their specific title).

Award. This has not always been the case. Nerrilee Weir, Senior Rights Manager, Penguin Random House Australia, noticed that approximately five years ago that after the shortlists for the Miles Franklin and Stella were announced, she was contacted by international rights buyers interested to learn more about the Penguin Random House titles (rather than Weir being the first to email her contacts with the news or a press release). It was a noticeable change in attitude for rights buyers to perceive that these books may have potential to sell in other territories and that the international markets were following the Australian book trade announcements.

The case study by Airlie Lawson about Richard Flanagan and Charlotte Wood's awards and international rights sales establishes a more complex scenario, however. In these examples, the rights to Flanagan and Wood's books had already been sold extensively to overseas territories before receiving major awards. Instead, these authors suggest that the awards potentially increased the bargaining power of their agents for future deals. The awards also enabled loyal overseas editors and publishers to advocate to continue to publish the author's work. Lawson concludes that the strengths which made the books award winners had already been effective in capturing the attention of rights buyers and international publishers.

In contrast, Katie McEwen, Pantera Press, discussed that it was easier to pitch a book which had won a major Australian prize. While pitching a manuscript begins before publication and before any award shortlisting or award win, an award win helps 'position' that book within the international markets and adds a level of renewed interest. Gaby Naher reported in her case study that she was able to sell the US rights for Heather Rose's *Museum of Modern Love* after it won the 2017 Stella Prize, having pitched it without success previously. As such, it appears that the effect of awards varies. However, it is a welcome development that overseas agents and other rights buyers are now taking an interest in the Stella and Miles Franklin shortlists with a view to rights acquisition. The relatively short time in which the Stella Prize has gained recognition and cachet among overseas rights buyers is a substantial achievement for the founders, sponsors and administrators of the award.

Award prize money itself remains vitally important for many Australian authors. Melissa Lucashenko, interviewed for this research, observes that "prizes and grants are what keep me going, and most of the writers I know, going" and that winning the Queensland Premier's Literary Award for *Mullumbimby* enabled her financially to keep writing.

Diversity of books and authors

While the findings of this report demonstrate the diversity of Australian books which have achieved rights sales success, the international English language book industry is increasing opportunities for books by a more diverse range of authors to be published, receive editorial and marketing support and have the opportunity for rights sales. One person interviewed for this research referred to the 'Anglo' characteristics of the Australian-authored adult fiction which has been commercially successful overseas. For example, many commercial women's fiction authors have Anglo-Saxon backgrounds, as do their protagonists and the books' settings. The reasons for this are complex and it is not within the scope of this project to propose causal reasons as to why this pattern has emerged. Further, industry is pursuing ways to promote greater diversity within the book industry workforce.

Jacinta Di Mase, a Melbourne-based literary agent, is interested in industry developments to increase the opportunities for authors from diverse backgrounds. It is an area she invested in several years ago.

I hired Danielle Binks about five years ago and my brief to her was that I wanted more own voices and a greater diversity on the list. I didn't feel like I had the skillset or networks to do that for middle grade and YA books. It was a gap in the list and she has successfully met the brief to bring in more own voices, whether it is writing about body positivity or working with writers with a disability, LGBTQI community.

In terms of selling overseas, every territory has their own communities facing these issues, struggling with these issues, trying to get their voices heard so it is not surprising that those books don't necessarily travel. I respect that. Why should we come in and say, "You should listen to us." You should be hearing your own voices.

The Australian industry has been going through its own debate about ways to promote diversity. The Stella Prize, founded in 2011, includes a number of initiatives to improve the representation of Australian women in literary awards, books by women that are reviewed in the literary sections of major Australian newspapers, and the proportion of women as book reviewers. As noted previously, it has been remarkably successful in achieving measurable change (Burke, 2021; Stella, 2019).

The interviews for this project were conducted in the wake of Melissa Lucashenko's success in winning the 2019 Miles Franklin award and a number of high profile international rights sales for books by Indigenous authors such as *The Yield* by Tara June Winch (which subsequently won the 2020 Miles Franklin award). However, the empirical timeframe of 2008-2018 for this report ends prior to these developments and growing momentum to publish books by diverse authors. It appears that opportunities for international rights sales may increase due to the establishment of imprints such as HarperVia (an imprint of HarperCollins) which has a mandate to publish diverse voices. On 6 July 2020 Simon & Schuster US announced that Dana Canedy had been appointed as senior vice president and publisher of its flagship imprint, the first Black appointment to this senior role. Some media coverage of her appointment has been framed in terms of the book industry's strategies to promote diversity (Chotiner, 2020). In 2020 Allen and Unwin announced a new imprint, Joan, curated by Nakkiah Lui "to help create space for the voices that get pushed to the fringes" (Kembrey, 2020).

Given Australia's multicultural population, it is natural to ask whether Australia may be well-positioned for authors from diverse backgrounds to participate in increased opportunities for international publication. Not surprisingly, the answer is complicated. First, as Juliet Rogers, former CEO of the Australian Society of Authors discusses in a case study, the quality of writing is paramount and it takes authors years to craft their skills. Rogers advises that starting from an early age, Australian children from diverse backgrounds need opportunities to develop their writing and for those with talent to be nurtured and mentored over time. The book industry needs to explore ways to employ a more diverse workforce: a challenge because many roles are modestly paid and many members of the book industry work long hours of unpaid overtime in an industry with tight profit margins (despite this, these jobs are highly sought after).

Dr Stuart Glover, Policy & Government Relations Manager, Australian Publishers Association, advised that:

In mid 2021 in line with several international publishing organisations, the APA has elevated "Diversity and Inclusion" to be a priority for itself and the industry. The APA expects to develop resources and programs to support greater diversity and inclusivity over time. The APA's initial focus is on generating trend data about the make-up of industry workforce. The APA expects that supporting long-term change to the make-up and skill base of the workforce will ultimately influence how and what the industry publishes and for whom.

A key finding from this research is that all book authors need the opportunity to work on the craft and quality of their writing over time if their books are to be considered for international publication. Most authors supplement income from their writing with other paid work or support from other sources such as their partner (Throsby, Zwar, & Longden, 2015e, p. 2). In the current changing local and international publishing marketplace, there may well be increased opportunities for international publication by Australian authors from diverse backgrounds. Australian rights sellers and agents are responsive to international demand and have said informally to the researchers that in the most recent years outside of the data captured by this report, they are experiencing growing international interest in works by Australian authors from diverse backgrounds. This leads Australian rights sellers to feature strong books by diverse authors more prominently when they pitch. Nerrilee Weir, Penguin Random House, commented, "Opportunities for diverse authors and voices will increase as we [in publishing houses] all start paying more attention, finding these voices and publishing them". The contemporary success of diverse authors also opens up areas for future research, for example, into the authors' international career opportunities, the reception of their work overseas, and the effects of industry initiatives to promote capacity building and change.

Impact of COVID-19 on international rights sales of Australian-authored books

The COVID-19 pandemic has had a rolling series of impacts on international rights sales of Australian-authored books. The first wave has arguably been the lockdowns of retail outlets in early 2020 in countries where Australian-authored books are sold, combined with the impact of COVID-19 on unemployment and consumer confidence. This has had several economic consequences for booksellers, publishers and agents in key overseas territories leading them to concentrate on the domestic book industry and devising strategies to deal with sudden, severe losses of revenue. This lack of confidence has in general put interest from publishers and agents in overseas rights purchases on hold, perhaps with the exception of very large publishers. Some large publishers have informally reported strong sales from their largest overseas territories, offsetting losses from other smaller territories where rights sales have almost ceased due to the pandemic.

Second, the key trade fairs where rights are bought and sold have been cancelled in 2020 or scheduled in very uncertain conditions. For example, the London book fair, the Bologna book fair and the New York rights fair were cancelled in early 2020. Although after some conjecture the Frankfurt book fair organisers announced that it would go ahead in October 2020 it is not clear whether the same level of rights sales activity was sustained as pre-COVID. Frankfurt has opted for a hybrid model in 2021, with in-person and online events and activities. Australian agents and publishers are using both their existing relationships to investigate rights sales opportunities via digital communication while taking advantage of new technology to 'cold call' with some rights sellers reporting the opportunities to meet with people they haven't been in touch with before via zoom as part of their now fully digital and virtual book fair meeting

schedules. All the agents and publishers interviewed for this research estimated that it will take at least two years for the Australian and international English book industry to recover. While it might take some time for rights sellers to be back at a book fair presenting their titles to their networks in person, the need to innovate and make connections remains a vital part of the publishing ecosystem.

However, attention also needs to be paid to the authors working on the ‘pipeline’ of manuscripts in development in Australia that would in usual circumstances eventually lead to rights sales. Many authors who had book launches scheduled in 2020 have seen those launches postponed. Those book releases which went ahead did so with reduced opportunities for publicity and sales (such as live events and associated media coverage). As Jacinta di Mase observed, for those readers who turned to ebooks borrowed from libraries in the pandemic, there is no payment to Australian authors from the Public Lending Right (PLR) scheme for ebooks as it applies only to print copies held in Australian libraries. The industry has been lobbying for several years on the extension of the PLR scheme to include ebooks and audiobooks.

Australian authors rely on other sources of income to support their writing which have also been affected. Many authors have lost income due to the COVID-19 leading to the cancellation of paid schools and library speaking engagements, appearances at writers festivals and casual work as writers for corporate and government projects. Publishers have cut budgets for advances and new acquisitions. (Anecdotal accounts suggest that publishers of all sizes are looking closely at their acquisition lists and costs.)

This cautious approach is typical of many professions and industries in Australia and other countries affected by the COVID-19 pandemic, with individuals and businesses struggling to survive financially. The role of this report is to reflect on the opportunities for rights sales of Australian-authored books, especially given that they were at a historic high prior to the pandemic and were achieved on the basis of decades of growing capability to export intellectual property from the Australian onshore book industry. The findings suggest that it takes many authors years of developing their writing skills before their books are sold internationally. Even if they find overseas success with their first book, getting to that point will have taken years of work and (often) sacrifice. Melissa Lucashenko’s account of 20 years of critical and literary success but low income as an author is not unusual.

It would be fair to say that all the aspects of the ‘pipeline’ that lead to high quality books in a range of genres that find overseas markets are under pressure. These include authors’ capacity to fund their work as writers, publishers’ capacity to pay advances and provide editorial and development support, Australian booksellers’ abilities to sell books and establish a successful sales record domestically, and agents’ and rights sellers’ opportunities to sell the rights overseas. However, as this report has noted, there have always been challenges in selling rights in Australian authors; this pandemic is the latest challenge. As Australian literary agents and rights sellers adapt to online platforms to maintain their networks and pitch their authors’ titles, they are also looking to the time when opportunities to travel will open up again. The next section proposes recommendations for industry and government based on the findings.

Recommendations

During this research, we asked senior industry figures for their recommendations to build on Australia's recent achievements in international rights sales, in order to position the Australian book industry to resume exports as the international book trade slowly rebuilds. The recommendations are listed as follows. They are presented for consideration and further discussion by industry associations, funding bodies, ministers and government departments.

Industry capacity building

Publishers

If possible, have a dedicated role in a publishing organisation for rights sales. This could be a part-time role or involve one role shared across a number of small publishers. The financial challenge is that it is likely to take several years before this investment results in rights sales, and a long-term commitment is needed.

Records management

Use a professional rights management software system or another proven rights sales record-keeping system.²⁸

Contracts

Extend initiatives underway by key industry associations such as the ASA and APA to provide template contracts and author agreements.²⁹ Raise awareness about the availability of these template contracts among authors and publishers. Provide support for contract assessment services currently provided by the likes of the ASA and Arts Law Centre of Australia.

Promotional initiatives

The 'Think Australian' and 'Hello from Australia!' materials were referred to in the case studies as being valuable for publishers and agents at overseas book fairs. They should be continued and new opportunities and initiatives identified and implemented.

Cultural diplomacy events in New York, London and other international cities should include invitations to senior overseas book publishers and literary agents as part of the cross-medium promotion of Australian talent and culture if this is not already established practice.

Training and mentoring

Extend existing rights sales management training and mentoring in the industry. A starting point could be to conduct an audit of whether there are rights sales courses or professional development materials in other countries.

Every two/three years, hold a one or two-day rights sales symposium in Australia. Bring out senior rights sales figures as guests. Hold sessions on rights sales contracts, market updates, and how to pitch effectively. One model might be the Rights Symposium held

²⁸ Nerrilee Weir, Senior Rights Manager, Penguin Random House presented an APA webinar on rights sales record-keeping. See <https://www.publishers.asn.au/events/event/webinar-rights-sales-administration>.

²⁹ See <https://www.asauthors.org/campaigns/fair-contracts> (ASA) and <https://www.publishers.asn.au/resources/author-agreements> (APA).

as part of the VIP 2019 program convened by Nerrilee Weir with support from the Australia Council for the Arts.

Establish formal mentoring programs between experienced rights sellers and less experienced industry members. This could include mentoring from senior figures who have stepped back from active rights sales work.

Extend existing informal and collegial networks in Australia to increase opportunities for new and less experienced publishers to inquire about the reputations and track records of potential rights sales buyers overseas.

Increase training and mentoring opportunities within the industry to entrants from diverse backgrounds within the area of rights selling.

Continue support for the Beatrice Davis Editorial Fellowship (administered by the Australian Publishers Association) for overseas placements. Although this is editorially based, it expands the international networks of the Fellows (see the case study interview with Mary Cunnane).

Metadata

An industry-wide initiative to promote the use of metadata to identify First Nations authors and authors from diverse backgrounds would enable broad-based data collection and analysis from existing datasets to examine changes in the publication and rights sales of these books. This information could be added to the existing “Special Features and Selling Points” field of a title’s metadata entry, at no extra cost to the industry. An industry-wide campaign to set up baseline data could attract strong support if led by key figures and key associations in the industry.

The collection of metadata could be used to complement existing records of publications by First Nations authors such as *Austlit*’s BlackWords database (www.austlit.edu.au/blackwords).

Funding organisations

Continue and consider increasing investment in the Visiting International Publishers (VIPs) program and other potential incoming international delegations. Such schemes directly support the top four activities identified by rights sellers required to strengthen their ability to sell rights in the future.

Continue support for overseas trade missions to key territories.

Continue support for translation grants and grants for market attendance at book fairs.

Investigate funding opportunities to support individuals to develop their skills and to build capacity in rights sales.

Explore opportunities for additional funding to enable Australian authors to travel to key markets to promote and publicise their works upon publication within that market.

Investigate the viability of a not-for-profit organisation dedicated to advancing the work of Australian writers overseas. A successful example already in place is that of Livres Canada Books. Governed by a volunteer board of directors, Livres Canada Books have

a mandate to “support Canadian-owned book publishers in their export sales activities, in developing international partnerships, and to assist publishers in improving their overall results through a range of services, including financial support, promotion, research, training, and a collective presence at major international book fairs”. The development of a similar organisation for Australian writers may allow the Australian book industry to build on its existing rights sales success and enjoy the economies of scale that derive from such collaborative endeavours.

Government

Continue and improve funding support for Australian stands at key book fairs.

Draw on initiatives by Canada and France to raise the profile of Australia’s literature and leading thinkers overseas via diplomatic channels. This has the potential benefit of building Australia’s soft power as well as promoting interest in rights sales acquisitions.³⁰

Extend the Public Lending Right (PLR) scheme to include ebooks and audiobooks. This is consistent with policy imperatives behind payments for loans of hard copy books from public libraries to Australian authors, upon reaching a certain threshold of loans. This support enables Australian authors to spend more time working on the quality of their books and writing.

Continue and extend funding support for authors. This remains essential for the long-term development of high-quality manuscripts that are competitive in international markets.

Benchmarking

This 2008-2018 survey could provide a baseline against which to measure future achievements in international rights sales and, if there be interest on the part of industry, funding organisations and government, this survey should be repeated to capture data for 2019-2024.

³⁰ French joint industry and government strategies were viewed as particularly effective in the Chinese market for rights sales, and French children’s books are positioned as being particularly prestigious for Chinese publishers to acquire.

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Appendix

Copy of the survey questionnaire.

Publisher / Agent / Other Organisation Details

Your Name

Organisation Name

Position

Phone number

Email address

Please describe your organisation:

Publisher

Literary agency

Management agency

Self-published author

Other (please specify)

Is your organisation:

A fully independently-owned Australian entity

An Australian subsidiary of a multinational entity

Other (please specify)

Does your organisation currently employ dedicated rights sellers on an ongoing basis:

Yes

No

Please state the number of dedicated rights sales sellers currently employed by your organisation on an ongoing basis:

Number of full-time rights sales sellers

Number of part-time right sales sellers

Are rights sales are handled by an employee in a mixed role in your organisation?

Yes

No

Approximately how many hours a week, on average, do these employees dedicate to the task of rights selling?

What other roles do these employees primarily undertake?

Editorial

Sales

Administrative

Other (please specify)

Do you use literary scouts/scouting agencies to develop rights sales?

Always

Sometimes

Never

Are you or your organisation a member of any of the following Australian industry associations? Select all that apply.

Alliance of Independent Authors

Australian Crime Writers Association

Australian Literary Agents' Association

Australian Poetry

Australian Publishers Association

Australian Society of Authors

Copyright Agency

First Nations Australia Writers Network

Historical Novel Society Australasia

Romance Writers of Australia

Small Press Network

Society of Children's Book Writers and Illustrators

Other (please specify)

What was your organisation's annual turnover in the financial year ending June 2018 (or the closest financial year to this period)?

\$50 million or higher

\$10 million – \$49.99 million

\$1 million - \$9.99 million

\$100,000 - \$999,999

\$50,000 - \$99,999

\$20,000 - \$49,999

Less than \$20,000

Approximately what percentage of your organisation's annual turnover in the financial year ending June 2018 (or the closest financial year to this period) was a result of international rights sales and exports?

For how long has your organisation been operating in Australia?

Less than 5 years

Between 5 years and 10 years

Between 11 years and 20 years

More than 20 years

For how many years have you personally been involved in the rights sales of books?

Less than 3 years

Between 3 and 10 years

Between 11 and 20 years

More than 20 years

Rights Sales Information (for the period 2008-2018)

Did you or your organisation successfully secure any international rights sales of Australian authored titles between 2008 and 2018?

Remember: The survey covers trade books - adult fiction (including poetry and graphic novels), non-fiction and children's. It does not cover textbooks. For the purpose of the survey, we consider an 'Australian book' to be any book written by an author who identifies as Australian, regardless of the book's subject matter or content.

Yes

No

[Please upload your organisation's rights sales transactions here]

Please nominate the top three most successful rights sales transactions (in terms of sales volume) that your organisation completed between 2008 and 2018. Please include the title and author for each entry.

Co-edition Information (for the period 2008-2018)

Did you or your organisation publish any co-editions of Australian authored titles between 2008 and 2018?

Note: For the purpose of this survey, co-edition refers to two (or more) publishers publishing the same title simultaneously (or near-simultaneously) across multiple territories.

Remember: The survey covers trade books - adult fiction (including poetry and graphic novels), non-fiction and children's. It does not cover textbooks. For the purpose of the survey, we consider an 'Australian book' to be any book written by an author who identifies as Australian, regardless of the book's subject matter or content.

Yes

No

[Please upload your organisation's co-edition activities here]

Direct Export Information (for 2018 only)

Direct export includes books which are supplied directly from your organisation to fulfil orders in other countries. This includes print, ebooks and audiobooks. Please select the territories to which you exported Australian authored trade titles in 2018:

New Zealand

United Kingdom

Republic of Ireland

France

Germany

Spain

Netherlands

USA

Canada

China

India

Indonesia

Singapore

South Korea

Brazil
United Arab Emirates
Other (please specify)
My organisation did not directly export any titles in 2018

Of the territories selected, please rank them in order of income generated in 2018, with 1 indicating the territory that generates the highest income.

What was the gross income generated for your organisation by direct export sales in the calendar year 2018?

Over \$3 million
\$2 million – \$2.99 million
\$1 million – \$1.99 million
\$500,000 – \$999,999
\$200,000 - \$499,999
\$50,000 - \$199,999
\$10,000-\$49,999
\$2,000-\$9,999
Less than \$2,000

Strengthening the Capacity to Sell International Rights

Which of the following conduits/fairs do you currently use in order to develop rights sales transactions?: Please select all that apply.

Attendance at Frankfurt Book Fair
Attendance at London Book Fair
Attendance at BookExpo America
Attendance at Children's Book Fair
Attendance at Beijing International Book Fair
Attendance at Shanghai International Children's Book Fair
Scouts
The Australia Council's Visiting International Publishers (VIP) program
Australia Council-led market delegations
Formal sub agency arrangements with overseas rights agents
Internet-based rights marketplaces (eg ASA International Marketplace Catalogue, Publishers Marketplace)
Formal relationships with sister companies overseas
Informal relationships with likeminded publishers overseas
Books+Publishing's annual Think Australian edition
Rights sales trips to specific markets
Searching online for agents/publishers & making contact by email/phone/website
Australian Government Export Market Development Grants (EMDG) scheme
Other conduit/fair (please specify)

For each of the conduits/fairs you selected, please select how important you think they are when it comes to facilitating rights sales transactions:

Extremely important
Moderately important
Have used but have not facilitated rights sales yet
Have used but will not use again
Undecided

How would you rate your organisation's success in selling international rights to Australian books to date?

- Very successful with no scope to improve
- Very successful with scope to improve
- Moderately successful with no scope to improve
- Moderately successful with scope to improve
- A little successful with no scope to improve
- A little successful with scope to improve
- Unsuccessful with no scope to improve
- Unsuccessful with scope to improve

Briefly state the reason behind your answer to this question: (optional - up to 200 words)

How well equipped is your organisation to sell international rights to Australian books in the future?

- Very well-equipped with no scope to improve
- Very well-equipped with scope to improve
- Moderately well-equipped with no scope to improve
- Moderately well-equipped with scope to improve
- A little well-equipped with no scope to improve
- A little well-equipped with scope to improve
- Not well-equipped with no scope to improve
- Not well-equipped with scope to improve

Briefly state the reason behind your answer to this question: (optional - up to 200 words)

What is needed to strengthen your ability to sell rights in the future? Select all that apply.

- Learn how to identify the publishers/agents who might be interested in my lists
- Capacity to build/strengthen my international networks
- Improved training programs
- More industry delegations to specific territories
- Increased funding for Australian authors to promote books in international markets
- Learn how to pitch my titles more effectively
- More time in addition to my other responsibilities
- More effective rights sales record keeping tools
- Increase in the number of dedicated rights sales employees at my organisation
- Support for agents/rights sellers to attend international trade fairs
- Increased investment in new technologies that change the way rights are sold
- Other (please specify)

Please rank your selections by order of importance (with 1 being the most important factor impacting your ability to sell rights in the future).

It has been suggested that a national database of Australian titles which lists the international rights sold and rights available would assist in securing sales and strengthening the processes involved in selling international rights to Australian books. Such an initiative would be designed and run in consultation with the Australian book industry. What is your view?

Strongly agree
Agree
Disagree
Strongly disagree
Unsure – more detail required

Briefly state the reason behind your answer to this question: (optional - up to 200 words)

It has been suggested that crypto technologies such as blockchain could create a new ecosystem through which rights could be bought and sold. What is your view?

Strongly agree
Agree
Disagree
Strongly disagree
Unsure – more detail required

Briefly state the reason behind your answer to this question: (optional - up to 200 words)

In a changing digital world, how important do you think face-to-face contact is when conducting rights sale negotiations?

Very Important
Moderately Important
Not at all important

What are the current obstacles you face in regards to expanding your rights sales? Select all that apply.

Competition from other publishers/literary agencies (including Australian and overseas)
The number of titles in overseas markets which compete with my lists
Distance from other markets
Lack of international networks with publishers and agents
Difficulty attracting interest from overseas publishers and agents in my lists
Limited knowledge about how to use rights sales resources effectively
Type of work published (i.e. locally focused)
Changing international trends running counter to my lists
Insufficient support from external bodies
Insufficient support from your organisation
Difficulties in identifying and/or making connections with the relevant international publishers/agents/scouts
Cost of international author tours to promote books
Cost of translation
Delays in tax office certification
Lack of regular, ongoing research on rights sales to inform decisions
Insufficient rights sales record keeping and management systems
Other (please specify)

From your selections, please rank the biggest obstacles you face in regards to expanding your rights sales.

In your opinion, over the past 10 years, have you sensed an increase in international interest in Australian authored books?

Yes
No
Unsure

What do you think the reasons for this increased interest in Australian authored books are? Select all that you think apply.

Strength of my professional international relationships in the industry
Increased commercial appeal of the books in overseas territories
Greater awareness of the quality of Australian authors from overseas publishers and agents
Greater awareness of the quality of Australian authors from overseas readers
Educational appeal
Australian writers are writing books which fit with international trends
Ability of international readers to engage with Australian authors through social media
The higher profile of successful Australian books and authors overseas amongst readers and book buyers
Australian best-selling books overseas have generated increased interest from publishers and agents
Positive reviews of Australian books overseas (includes reader reviews and critical reviews)
My improved ability to sell international rights effectively
I have successfully built relationships with like-minded agents and publishers overseas
Improved Australian presence at international trade fairs
Ability to connect with potential rights buyers online
My ability to buy the rights to overseas titles (reciprocal relationships)
The ability of Australian rights sellers to attend book fairs
Other (please specify)

Please rank the reasons that you believe that there has been increased interest in Australian books overseas.

In approximately what year did you first sense a significantly increased interest in Australian books?

Optional Questions

As part of this research project, we are also developing a series of case studies of author, agency and publisher experiences with the sale of international rights. The case studies will cover a broad range of authors (first time and established), genres, territories, rights deals, Australian publisher size (small and large) and strategies for success

These case studies will play an important role in adding depth and insight to the quantitative findings. If you have a suggestion for a case study, please outline your idea in the box below (no more than 300 words). We will consider all suggestions and will contact you with a response.

Any other comments?

Excerpt from deals template spreadsheet.

		Required Information									
	Year of first publication of local title in Australia	Year deal secured	Title	Author	Genre	Language	Territory / Country of Third-Party Publisher	Term of contract	Size of advance in AU\$ (in total, not publisher share)	Has this title earned out its initial advance from this particular deal?	
Suggested responses →		• We are collecting information on all deals secured (contracted) between the ten year period of 2008 and 2018 only. • If rights were on sold to a new third party as a result of that original deal, please only list the original deal.	• Where the deal is for multiple titles (e.g. a two- or three-book deal), please list each title separately.	• Last name, first name	• Genre categories can include: Adult Fiction – Literary Adult Fiction – Commercial Adult Non-Fiction - Narrative Adult Non-Fiction - Illustrated (cooking, lifestyle, etc) Picture Books Middle Grade Teen Readers Young Adult	• E.g., English language German Spanish Chinese Complex Chinese Simplified Portuguese	• Please specify the country of the acquiring publisher, e.g. Spain for Spanish world language rights.	• E.g., 5 Years 7 Years 10 Years Term of Copyright Limited Print Run and Term Other	• Less than \$1,000 • \$1,001 - \$5,000 • \$5,001 - \$10,000 • \$10,001 - \$15,000 • \$15,001 - \$20,000 • \$20,001 - \$30,000 • \$30,001 - \$50,000 • \$50,001 - \$100,000 • \$100,001 - \$250,000 • \$250,001 - \$500,000 • \$500,001 - \$500,000 • over \$500,000	• Yes • No • Unsure	
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