

# Literature and Publishing Sector Review

## Appendices

July 2015

Commissioned by:

**Creative Scotland**

Prepared by:



**Nordicity**

in association with

drewwylie

## 1. CONSULTEES

### Organisations Consulted

Annual Business Survey, ONS	Book Festival	Sainted Media/Global Treasure Apps
Arts Council England	Edinburgh League of Comics	Sandstone Press
Association of Author's Agents	Edinburgh UNESCO City of Literature	Saltire Society
Backpage Press	Editions Métailié	Saraband
BBC	Emergents	Scottish Book Trust
Beyond Borders International Festival of Literature & Thought	Festivals Edinburgh	Scottish Household Survey
Birlinn	Freight Books	Scottish Library & Information Council
Black Hearted Press	Gaelic Books Council	Scottish Poetry Library
Blasted Heath	Glasgow Aye Write	StAnza
Bloody Scotland	Glasgow Comic Convention	Stirling Centre
Bookfestival Scotland	Glasgow Women's Library	Stirling University
Borders Book Festival	Good Press	STV Digital Spark Award
British Council	Highlight Arts	Swedish Arts Council
Business & Enterprise Statistics, Scottish Government	Jenny Brown Associates	The Booksellers Association
Canongate	Literary Dundee	The Glad Rag
Centre for Literature and Writing (CLAW), Edinburgh Napier University	Literary Review	The Publishers Association
Communities Analytical Services, Scottish Government	Literature Alliance Scotland (formerly Literature Forum for Scotland)	The Secret Experiment
Cove Park	Looking Glass Books	Tidelines Book Festival
Creative Scotland	Main Street Books	Traditional Arts and Culture Scotland (TRACS)
Danish Arts Council	Metaillie	Ullapool Book Festival
Dundee City Council	Moniack Mhor	University of Dundee (MLitt Creative Writing)
Dundee Literary Festival	Napier	Village Storytelling Centre
Edinburgh International	Publishing Scotland	Watermill
	Rally & Broad	Waterstones
	Reykjavik International Literary Festival	Writers' Centre Norwich
	Reykjavik UNESCO City of Literature	

## Individuals Consulted

Adele Patrick	Colin Bradie	Jessica Higgins
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Allan Guthrie	Eleanor Livingstone	Kevin MacNeil
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Ann Matheson	Ewan Morrison	Kirsty Gunn
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Philippa Johnstone	Sara Hunt	
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Up to a further 1,000 individuals were consulted through the Nordicity Survey.

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### 3. SCOTLAND'S LITERATURE FESTIVALS

Winter Words Festival Pitlochry	February	Festival	
StAnza: Scotland's International Poetry Festival	March	Tidelines Book Festival	September
Wee Write! Glasgow's Book Festival for Children and Young People	March	Wigtown Book Festival	September
Aye Write! Glasgow's Book Festival	April	BOOKMARK: Blairgowrie, Rattray and The Glens Book Festival	October
Colonsay Book Festival	April	Dundee Literary Festival	October
Booked! West Dunbartonshire Festival of Words	May	Edinburgh Independent and Radical Book Fair	October
Boswell Auchinleck Book Festival	May	Encounters (North Lanarkshire Cultural Festival)	October
Off the Page: Stirling Book Festival	May	Faclan: The Hebridean Book Festival	October
TradFest Edinburgh: Dun Eideann	May	Huntly Book Festival	October
Ullapool Book Festival	May	Imprint: East Ayrshire Book Festival	October
Word: University of Aberdeen Writers Festival	May	Orkney Book Festival	October
Borders Book Festival	June	Portobello Book Festival	October
ReadLochaber Festival	June	Scottish International Storytelling Festival: Stories without Borders	October
Aos Dana (Skye Festival)	July – August	Linlithgow Book Festival	November
Beyond Borders International Festival of Literature and Thought	August	North Ayrshire Council Readers' Day	November
Edinburgh Book Fringe	August	Shetland Noir: Shetland's First Crime Writing Festival	November
Edinburgh International Book Festival	August	Tarbert Book Festival	November
Inverness Book Festival	August	Wordplay Shetland	November
Bloody Scotland	September	Write by the Shore (Cockenzie House Book Festival)	November
Nairn Book and Arts Festival	September	Black Isle Words Festival	TBC
Spirit of Moray Book Festival	September	Islay Book Festival	TBC
The Three Lochs Book and Arts	September	New Words	TBC

Note: 2015 festival dates.

## 4. Data Tables

### Readership

**Figure 1 – Participation in cultural activities in the last 12 months (in %)**

<b>Adults</b>	<b>2012</b>	<b>2013</b>
Read for pleasure	69	68
Creative work on computer/social media	23	23
Crafts	14	15
Dance	12	12
Played instrument / written music	11	11
Photography / making films or videos	10	10
Art / sculpture	9	10
Creative writing	4	5
Performance with audience	3	3
Other cultural activity	2	2
None	22	22
Any (exc. reading)	48	49
Any (inc. reading)	78	78
<b>Base</b>	<b>9,890</b>	<b>9,920</b>

Source: 2013 Scottish Household Survey

**Figure 2 – Attendance at cultural events and visiting places of culture in the last 12 months (in %)**

Adults	2012	2013
Cinema film	54	56
Live music event	31	31
Theatre - e.g. pantomime/play	31	32
Library inc. mobile/online	30	30
Museum	29	31
Historical / archaeological place	28	28
Gallery	19	20
Exhibition - e.g. arts/crafts	15	16
Street arts	12	14
Culturally specific festival	11	14
Dance show/event - inc ballet	9	10
Classical music performance/opera	7	7
Book festival / reading group	4	5
Archive / records office	2	2
None	22	20
Any (exc. cinema)	70	72
Any (inc. cinema)	78	80
Base	9,890	9,920

Source: 2013 Scottish Household Survey

**Figure 3 – Frequency of attending cultural events and visiting places of culture in the last 12 months (selected activities)**

Adults (%)	At least once a wk	< once a wk / at least once a mth	< once a mth / at least 3-4 times a year	Twice in the last 12 mths	Once in the last 12 mths	Don't know	Total	Base
Cinema	4	23	43	21	10	0	100	4,910
Live music event e.g. traditional music, rock concert, jazz event (not opera or classical music performance)	2	10	30	31	27	0	100	2,800
Theatre e.g. musical / pantomime / play	0	4	25	39	32	0	100	3,080
Library (including mobile and online)	20	39	19	16	7	1	100	3,060
Book festival or reading group	2	11	9	20	57	1	100	470

Source: 2013 Scottish Household Survey

**Figure 4 – Proficiency in Gaelic amongst Scottish people**

Gaelic Proficiency	Scotland
All people aged 3 and over	5,118,223
Understands but does not speak, read or write Gaelic	23,357
Speaks, reads and writes Gaelic	32,191
Speaks but does not read or write Gaelic	18,966
Speaks and reads but does not write Gaelic	6,218

Source: Scottish Census Data (2011)

## Writers

**Figure 5 – Standard Occupational Codes for authors, writers and translators (SOC 3412)<sup>1</sup>**

Sector (SIC 2007) <sup>2</sup>	UK			Scotland		
	SOC 3412	All other occupations	All occupations	All occupations	All other occupations	SOC 3412
58.11 Book publishing	7,134	31,180	38,314	38,314	1,073	965
58.13 Publishing of newspapers	1,046	39,577	40,623	40,623	3,326	294
58.142 Publishing of consumer and business journals and periodicals	2,318	41,149	43,467	43,467	232	-
58.19 Other publishing activities	977	31,992	32,969	32,969	1,672	-
59.113 TV programme production activities	909	30,624	31,533	31,533	527	-
60.20 TV programming & broadcasting activities	582	51,784	52,366	52,366	3,824	-
73.11 Advertising agencies	2,986	95,777	98,763	98,763	*	*
74.30 Translation and interpretation activities	17,782	2,780	20,562	20,562	-	661
82.19 Photocopying, document preparation and other specialised office support activities	1,403	11,593	12,996	12,996	446	353
84.11 General public administration activities	976	700,492	701,468	701,468	*	*
84.12 Regulation of health care, education, cultural and other social services, not incl. social security	548	264,084	264,632	264,632	*	*
85.31 General secondary education	775	815,642	816,417	816,417	57,405	-
85.421 First-degree level higher education	500	494,770	495,270	495,270	42,551	-
85.59 Other education n.e.c.	1,384	187,187	188,571	188,571	*	*
86.101 Hospital activities	1,144	1,362,678	1,363,822	1,363,822	130,535	-
88.99 Other social work activities without accommodation n.e.c.	1,021	618,024	619,045	619,045	*	*
90.01 Performing arts	724	46,320	47,044	47,044	*	*
90.03 Artistic creation	19,121	59,152	78,273	78,273	3,777	1,067
93.29 Other amusement and recreation activities n.e.c.	1,614	77,162	78,776	78,776	6,830	-
94.12 Activities of professional	1,073	83,508	84,581	84,581	*	*

<sup>1</sup> [ons.gov.uk](http://ons.gov.uk)

<sup>2</sup> [ons.gov.uk](http://ons.gov.uk)

membership organisations

***Other Sectors that employed Authors, writers and translators (SOC 3412) in the UK	11,319	5,277,889	5,289,208	5,289,208	391,230	446
All Other Sectors	-	19,337,766	19,337,766	19,337,766	1,638,589	-
<b>All</b>	<b>75,336</b>	<b>29,661,130</b>	<b>29,736,466</b>	<b>29,736,466</b>	<b>2,476,367</b>	<b>4,951</b>

Source: Annual Population Survey, Office for National Statistics (compiled by Scottish Government. SOC 3412: Authors, writers and translators.

**Figure 6 – Those earning a second living from SOC 3412**

Second Job Occupation	UK	Scotland
Authors, writers and translators (SOC 3412)	11,965	1,292

Source: Annual Population Survey, Office for National Statistics (compiled by Scottish Government. SOC 3412: Authors, writers and translators.

**Figure 7 – Earnings of writers compared with Minimum Income Standard**

	Earning (£)				
	2000		2005		2013
	Real terms	Actual	Real terms	Actual	Actual
Median of professional writers	-	-	15,450	12,330	11,000
Acceptable level for single people in UK*	-	-	-	-	16,850*
Median of all writers	8,810	6,333	5,012	4,000	4,000

\*Joseph Rowntree Foundation (JRF) figures published in 2013 show that single people in the UK need to earn at least £16,850 before tax to achieve a Minimum Income Standard (MIS), the income level considered to be a socially acceptable standard of living.

## Publishing

**Figure 8 – Number of publishing enterprises across Scotland (2010-2014)**

<b>58.11: Book publishing</b>	<b>Number of Enterprises</b>				
<b>Local Authority</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>
Edinburgh, City of	30	30	25	30	25
Glasgow City	10	10	10	10	10
Aberdeen City	5	5	5	5	5
Argyll & Bute	5	5	5	0	5
Dumfries & Galloway	5	5	5	5	5
East Lothian	5	5	5	5	5
East Renfrewshire	5	5	5	5	5
Eilean Siar	5	5	5	5	5
Highland	10	5	5	5	5
Midlothian	0	0	5	5	5
Moray	0	0	0	5	5
Perth & Kinross	5	5	5	5	5
South Ayrshire	5	5	0	0	5
South Lanarkshire	5	5	5	5	5
Stirling	10	5	5	5	5
Aberdeenshire	5	5	5	5	0
East Dunbartonshire	0	0	5	0	0
Fife	5	0	0	0	0
Renfrewshire	5	5	0	0	0
West Lothian	0	5	0	0	0
Angus	0	0	0	0	0
Clackmannanshire	0	0	0	0	0
Dundee City	0	0	0	0	0
East Ayrshire	0	0	0	0	0
Falkirk	0	0	0	0	0
Inverclyde	0	0	0	0	0
North Ayrshire	0	0	0	0	0
North Lanarkshire	0	0	0	0	0
Orkney Islands	0	0	0	0	0
Scottish Borders	0	0	0	0	0
Shetland Islands	0	0	0	0	0
West Dunbartonshire	0	0	0	0	0
<b>Scotland</b>	<b>130</b>	<b>115</b>	<b>110</b>	<b>110</b>	<b>105</b>

Note: 1. Excludes central and local government. 2. Each enterprise is counted once in each local authority it operates in. The sum of the local authority enterprises does not equal the overall Scotland totals because each enterprise is only counted once in the Scotland figures.

**Figure 9 – Publishing employment across Scotland (2009-2013)**

<b>58.11: Book publishing</b>	<b>Employment</b>				
<b>Local Authority</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
Edinburgh, City of	300	300	200	200	200
Aberdeen City	100	100	*	*	*
Aberdeenshire	0	*	*	*	*
Dundee City	*	*	*	*	*
East Ayrshire	*	*	*	*	*
East Dunbartonshire	*	*	*	*	*
West Lothian	*	*	*	*	*
Midlothian	*	*	*	*	0
Moray	*	*	*	*	0
Perth and Kinross	*	*	*	*	0
South Ayrshire	0	*	*	*	0
Renfrewshire	0	0	0	*	*
Scottish Borders	0	0	0	*	*
Falkirk	*	*	0	*	0
South Lanarkshire	0	0	0	0	*
Argyll and Bute	0	0	0	*	0
Eilean Siar	*	*	0	0	0
Stirling	100	100	0	0	0
Glasgow City	0	100	0	0	0
North Lanarkshire	0	*	0	0	0
Highland	100	0	0	0	0
Fife	*	0	0	0	0
Inverclyde	*	0	0	0	0
Angus	0	0	0	0	0
Clackmannanshire	0	0	0	0	0
Dumfries and Galloway	0	0	0	0	0
East Lothian	0	0	0	0	0
East Renfrewshire	0	0	0	0	0
North Ayrshire	0	0	0	0	0
Orkney Islands	0	0	0	0	0
Shetland Islands	0	0	0	0	0
West Dunbartonshire	0	0	0	0	0
<b>Scotland</b>	<b>1,200</b>	<b>1,400</b>	<b>1,000</b>	<b>1,000</b>	<b>1,000</b>

1. All figures rounded to the nearest 100.
2. Estimates are subject to sampling errors which increase as geographic areas become smaller and industry more detailed. Please see <http://www.ons.gov.uk/ons/publications/all-releases.html?definition=tcm%3A77-230512> to gauge the magnitude of these errors.
3. The data been collected based on a reference date. For example, in 2009 businesses were asked to return their employment data as of the 11th of September. The data have not been seasonally adjusted to take account of this reference date.
4. Industry codes on SIC 2007 basis.
5. \* denotes disclosive data.



## Booksellers

**Figure 10 – Number of bookselling enterprises across Scotland (2010-2014)**

<b>47.61: Booksellers</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>
Edinburgh, City of	15	10	10	10	10
Fife	10	10	10	10	10
Glasgow City	15	10	15	15	10
Highland	5	5	10	10	10
Aberdeen City	5	5	5	5	5
Aberdeenshire	0	0	0	0	5
Argyll & Bute	5	5	5	5	5
Dumfries & Galloway	5	5	5	5	5
Dundee City	5	5	5	5	5
Falkirk	5	5	5	5	5
Moray	5	5	5	5	5
North Ayrshire	5	5	5	5	5
North Lanarkshire	5	5	5	5	5
Perth & Kinross	5	5	5	5	5
Renfrewshire	0	0	5	5	5
Scottish Borders	5	5	5	5	5
South Ayrshire	0	0	5	5	5
South Lanarkshire	5	5	5	5	5
Stirling	5	5	5	5	5
West Lothian	0	0	5	5	5
East Renfrewshire	5	5	5	5	0
Angus	0	0	0	0	0
Clackmannanshire	0	0	0	0	0
East Ayrshire	0	0	0	0	0
East Dunbartonshire	0	0	0	0	0
East Lothian	0	0	0	0	0
Eilean Siar	0	0	0	0	0
Inverclyde	0	0	0	0	0
Midlothian	0	0	0	0	0
Orkney Islands	0	0	0	0	0
Shetland Islands	0	0	0	0	0
West Dunbartonshire	0	0	0	0	0
<b>Scotland</b>	<b>85</b>	<b>85</b>	<b>80</b>	<b>75</b>	<b>65</b>

Note: 1. Excludes central and local government. 2. Each enterprise is counted once in each local authority it operates in. The sum of the local authority enterprises does not equal the overall Scotland totals because each enterprise is only counted once in the Scotland figures.

**Figure 11 – Bookselling employment across Scotland (2009-2013)**

Local Authority	Employment				
	2009	2010	2011	2012	2013
Edinburgh, City of	300	200	200	200	200
Glasgow City	300	200	200	200	200
Aberdeen City	100	100	100	100	100
Dumfries and Galloway	100	100	100	100	100
Fife	100	100	100	100	100
Highland	100	0	100	0	100
Perth and Kinross	100	100	100	100	100
Angus	*	*	0	0	*
Clackmannanshire	*	*	*	*	*
East Ayrshire	0	0	0	*	*
East Dunbartonshire	*	*	*	*	*
East Renfrewshire	*	0	*	*	*
Eilean Siar	*	*	*	*	*
Orkney Islands	*	0	*	*	*
Renfrewshire	*	*	*	*	*
Scottish Borders	*	0	*	0	*
Shetland Islands	*	*	*	*	*
South Lanarkshire	*	0	0	*	*
West Dunbartonshire	*	*	*	*	*
West Lothian	0	*	*	0	*
East Lothian	*	*	*	*	0
Inverclyde	0	0	*	0	0
Moray	*	0	*	*	0
North Lanarkshire	0	100	0	0	0
Aberdeenshire	0	0	0	0	0
Argyll and Bute	0	0	0	0	0
Dundee City	0	0	0	0	0
Falkirk	0	0	0	0	0
Midlothian	0	0	0	0	0
North Ayrshire	0	0	0	0	0
South Ayrshire	0	0	0	0	0
Stirling	0	0	0	0	0
<b>Scotland</b>	<b>1,400</b>	<b>1,400</b>	<b>1,100</b>	<b>1,200</b>	<b>1,100</b>

1. All figures rounded to the nearest 100.
2. Estimates are subject to sampling errors which increase as geographic areas become smaller and industry more detailed. Please see <http://www.ons.gov.uk/ons/publications/all-releases.html?definition=tcm%3A77-230512> to gauge the magnitude of these errors.
3. The data been collected based on a reference date. For example, in 2009 businesses were asked to return their employment data as of the 11th of September. The data have not been seasonally adjusted to take account of this reference date.
4. Industry codes on SIC 2007 basis.
5. \* denotes disclosive data.

**Figure 12 – Scottish Annual Business Statistics (SABS) (sourced to ABS), 2008-2012 data for Scotland**

SIC / Description	Year	No. of Units	Total Employment (1,000)	Total Employees (1,000)	Total Turnover (£m)	Gross Value Added at Basic Prices (£m)	Gross Wages & Salaries Per Head (£)
<b>4761: Retail sale of books in specialised stores</b>	2008	214	1.7	1.7	118.5	33.4	9,394
	2009	165	1.3	1.3	117.3	33.0	12,140
	2010	162	1.4	1.3	89.6	23.7	8,617
	2011	163	1.1	1.0	97.8	24.4	11,125
	2012	159	1.2	1.1	81.2	19.1	9,120
<b>5811: Book publishing</b>	2008	143	1.1	1.0	132.6	54.3	23,317
	2009	132	1.1	1.1	106	44.9	22,270
	2010	116	1.4	1.3	123.8	52.6	20,275
	2011	110	1.0	0.9	104.5	43.6	22,800
	2012	109	0.9	0.9	119.4	56.4	28,284
<b>9003: Artistic creation</b>	2008	604	2.2	2.0	86.8	35.6	11,006
	2009	578	1.3	1.1	144.4	63.6	49,210
	2010	570	1.1	1.0	106.7	52.6	15,209
	2011	560	1.0	0.8	102.9	53.5	21,144
	2012	575	0.9	0.7	107.4	45.1	34,801

Source: Scottish Annual Business Statistics (SABS) (sourced to ABS), 2008-2012 data for Scotland.

**Figure 13 – Business units (2013)**

Area	SIC07: Total	SIC07: 4761 Retail sale of books in specialised stores	SIC07: 5811 Book publishing	SIC07: 9003 Artistic creation
United Kingdom	2,721,240	1,975	2,265	16,375
Scotland	203,755	145	110	570

Source: ONS

**Figure 14 – Number of enterprises (2013)**

Area	SIC07: Total	SIC07: 4761 Retail sale of books in specialised stores	SIC07: 5811 Book publishing	SIC07: 9003 Artistic creation
United Kingdom	2,263,645	1,035	2,160	16,250
Scotland	156,765	60	105	570

Source: ONS