Research Report Team
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EXECUTIVE SUMMARY

There is little data in the publishing industry about the best practices of small- and medium-sized book publishers, and these are the types of publishers that make up the base of PubWest. Therefore, the purpose of the PubWest Best Practices Survey was to capture information, primarily through responses to open-ended questions, from PubWest members about best practices. This survey was administered online using a third-party host (Qualtrics) through Portland State University. All raw data was analyzed anonymously by researchers at the book publishing program at Portland State University, led by Dr. Rachel Noorda.

Using qualitative research analysis methods of thematic coding and some quantitative statistical analysis and data visualization, this report offers an analysis of the 18 survey respondents to the PubWest Best Practices Survey. From the data, several best practices are extracted and recommended: diversifying income avenues, growing a successful business over time, knowing the audience and the best ways to reach that audience, engaging with readers not only through social media but also through in-person events, and participating in educational outreach and charitable giving. Finally, the community-building and network opportunities provided by PubWest, the data shows, continue to be important to the growth and success of PubWest members.

INTRODUCTION

The goal of the 2017 PubWest Best Practices Survey is to find out not only what PubWest publishers are doing, but to ascertain best publishing practices for PubWest members. The survey is comprised of three sections, focusing on members’ operations, lists, community involvement, and case studies of interesting titles (as reported by survey respondents). The sample size is relatively small, with 18 out of the approximately 141 publishers that are members of PubWest responding. It should be noted, too, that there were partial responses as well as duplicate responses for some questions, which were merged and/or omitted. The small sample size means that the results of the survey are not necessarily representative of PubWest publishers as a whole. Yet, there is much to be gleaned from the information contained in this report. Because the survey is a “best practices” survey, the data was analyzed with an eye toward making recommendations for best practices based on methods that respondents noted were effective, with useful takeaways for all PubWest members.
FINDINGS

Operations and Practices

This section focuses on the respondents’ operations and practices, including each publishing house’s location, date of establishment, 2016 net sales, breakdown of income sources, staff information, publishing-related organizations to which they belong, and distinguishing practices. What follows is a comprehensive look at the respondents’ answers.

Publishing House Location

Seventeen publishing houses responded to this question regarding publishing house location. After using a map to chart the locations of the respondents (see Appendix 4), it’s clear that the Pacific Northwest and the Southwest are particularly well represented, with eight respondents from each region. However, the Southwest respondents are more spread out—California, Arizona, New Mexico, Colorado, whereas the Northwest respondents are clustered along the Portland-Seattle-Vancouver corridor. The other notable thing about the map of members is the two outliers from Notre Dame, IN, and Webster Groves, MO. This serves as a reminder that despite its beginnings as the Rocky Mountain Book Publishers Association, PubWest does not exclusively serve the Western United States. To determine whether the sample is geographically representative of all PubWest members, another map was created to visualize the locations of all PubWest members. Indeed, the map with all members appears to generally correspond to that of the survey respondents—most are clustered in the Pacific Northwest, Southwest, and Rocky Mountains, with relatively fewer representing the Eastern United States. However, there is one notable exception—there are many PubWest members from the Bay Area of California that are not represented in the survey.

![2016 Net Sales (sample: 18)](chart)
2016 Net Sales (total revenue less discounts and returns)

Respondents were asked to represent their 2016 net sales in ranges (see question 8 in Appendix 3). Of the 18 respondents, one reported net sales of less than $5,000; two reported $25,000 to $50,000; two reported $50,000 to $100,000; two reported $100,000 to $250,000; two reported $250,000 to $500,000; two reported $500,000 to $1 million, and seven reported more than $1 million. At first glance, the most striking thing about the net sales data is how many companies reported more than $1,000,000 in sales (7). In any case, 13 of the 18 respondents reported more than $100,000 in sales. It is impossible with this limited data to say whether or not this same net sales pattern would be true of PubWest membership as a whole, and it could be that higher-income publishing houses were more able to take time to respond to the survey, which would explain the high representation of companies who made more than $1,000,000 in net sales. Finally, the median net sales of this sample is between the $100,000–$250,000 and $250,000–$500,000 ranges.
Establishment Date

Seventeen publishing houses indicated when they were established. The earliest respondent was established in 1865, the latest in 2014. As expected, there is a general correlation between years in operation and net sales—the highest-earning respondents were established the earliest, and most of the lowest-earning respondents were established more recently. The latest a million-dollar company was established was in 1993, and there were four of the million-dollar companies established between 1980 and 1993. Eleven of the 17 respondents were established in 1980 or later. The 1980s, 1990s, and 2000s saw the most publishing houses established (3 for each decade), followed by the 2010s (2). Before 1980, the establishment dates are more scattered—1865, 1911, 1938, 1942, 1968, and 1979.

Income Sources

Of the respondents, 15 of 18 reported earning a majority of their income from books. However, 14 respondents reported at least one other means of income, with only four earning 100% of their income from books. The most notable source of income is merchandising—in fact, three of the respondents reported earning more from merchandising than from books. It’s worth noting that these three respondents are also million-dollar companies, suggesting that nonbook merchandising has the potential to be a lucrative income stream. It’s difficult to make any conclusions about the remaining income sources other than to note that several of the respondents earn a relatively small portion of income (less than 20%) from private sector funding, public sector funding, and subrights.
Types of Staff

Respondents were asked to provide information on the number of full-time and part-time staffers as well as freelancers. Eleven of 18 respondents have fewer than six full-time and part-time employees. As expected, the higher-income companies appear to have the resources to hire more full-time and part-time staff members. For the higher-income companies, the number of freelancers is dwarfed by the number of employees. For most of the respondents with 2016 net sales less than $1,000,000, however, freelancers make up considerably more of the total workload. Due to the nature of freelancing, a company is more likely to contract work from different freelancers for various jobs over the course of a year rather utilize one freelancer for all required freelancing work, which could account for the high number of freelancers reported by respondents. Also, burgeoning middle-income companies may have the number and scope of
projects necessary for an increased workforce but not the income required to cover full-time benefits for employees.

**Staff Job Titles**

After providing data on the size of their staffs, respondents were asked to provide the title and salary of each full-time employee. Fourteen respondents provided the titles of their full-time employees, and five respondents provided salary data. All 14 respondents mentioned at least one chief staff member—“publisher,” “publishing manager,” “director,” or “president.” Of the respondents who provided salary data, the top-earning employee earned an average salary of $73,792. Eight respondents listed at least one person in an editorial role, and six listed at least one person in a marketing role. Five respondents listed six or more full-time employees with roles dedicated to design, digital services, shipping and warehousing, accounting, publicity, and human resources. Of the companies that listed more than six full-time employees, three reported more than $1 million in 2016 net sales and two reported $500,000–$1 million in net sales.

**Membership in Publishing-Related Organizations**

The survey participants were asked which publishing-related organizations (besides PubWest) they belong to, and 15 responded to the question. Seven of the respondents indicated that they did not belong to any other organizations, and one indicated that they were unsure. Several respondents mentioned national publishing organizations, regional publishing organizations, and niche organizations. A full list of organizations mentioned by participants in the survey can be found in Appendix 3.

**Differentiating Elements of Operations and Practices**

The respondents were asked which elements of their operations and practices—excluding genre or mission—served to differentiate them from the other publishers. Fourteen of the respondents provided an answer for this question. Two respondents mentioned that they work from home and have little to no overhead. Four mentioned collaboration in a general sense or more specifically in working closely with authors. Two contrasted their operations with what they view to be those of large publishers. Two mentioned nonbook products, including webinars and free PDFs for the public. Two mentioned being a publishing arm of a larger organization, and two mentioned handling some aspect of their business in-house—specifically distribution and retail. Finally, four respondents felt that their particular niche (education, geology, religion, technical fields) set them apart from other publishers.

**List**

This section focuses on the respondents’ lists, including list categories, niche areas, titles in print, titles published in 2016, average print run, e-book sales, distribution, sales channels, areas of growth, and challenges publishers face. What follows is a comprehensive look at the respondents’ answers.
List Categories

There were 11 publication categories listed: Academic, Children’s, Cookbooks, Educational, Fiction, Narrative Nonfiction, Other, Photography or Art, Poetry, Regional Nonfiction/Travel, and Technical or Scientific. Eight of the 18 (44.4%) respondents identified Regional Nonfiction/Travel as one of their publication categories; seven publishers (38.8%) identified Narrative Nonfiction as one of their publication categories; six respondents (33.3%) identified Children’s as one of their publication categories; six respondents (33.3%) identified Cookbooks as one of their publication categories; six respondents (33.3%) identified Other as one of their publication categories; four publishers (22.2%) identified Technical or Scientific as one of their publication categories; three respondents (16.6%) identified Fiction and Photography or Art as one of their publication categories; one publisher (5.5%) identified Academic as one of their publication categories; and no respondents identified poetry as one of their publication categories.

Publishers were asked to identify any books that fell into the category of Other, which broke that category down into the following four subcategories: Ghost stories, Illustrated Nonfiction, Gift/Humor, and Religious. Only one respondent selected each subcategory, with the exception of the Religious category which was selected by two publishers.

Survey respondents could select more than one category, although no publisher selected fewer than one and no publisher selected more than six categories. One respondent (5.5%) selected six categories, one publisher (5.5%) selected five categories, three respondents (16.6%) selected four
categories, three publishers (16.6%) selected three categories, four publishers (22.2%) selected two categories, and six publishers (33.3%) selected one category. While it was thought that there might be a correlation between net sales and the number of publication categories selected, no such correlation was found.

**Niche Areas**

<table>
<thead>
<tr>
<th>Niche Categories</th>
<th>Number of Publishers (sample: 18)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Children's Picture Books</td>
<td>1</td>
</tr>
<tr>
<td>Language Learning</td>
<td>1</td>
</tr>
<tr>
<td>Religious</td>
<td>1</td>
</tr>
<tr>
<td>Spirituality</td>
<td>2</td>
</tr>
<tr>
<td>Regional</td>
<td>3</td>
</tr>
<tr>
<td>Health</td>
<td>3</td>
</tr>
<tr>
<td>Science</td>
<td>3</td>
</tr>
<tr>
<td>Travel Guides</td>
<td>4</td>
</tr>
</tbody>
</table>

Respondents were asked if their titles fit into any niche categories within the broader categories they previously selected and if their titles might appeal to particular niche audiences. Only one publisher (5.5%) answered the latter question, so there is little that can be said about that dataset. However, 15 out of the 18 respondents (83.3%) answered the former question. Eight niche categories were identified: Regional, Spirituality, Children’s Picture Books, Language Learning, Health, Religious, Travel Guides, and Science. The language used to identify these niche categories varied widely and it is likely that some publishers that have titles in these categories did not write them in. There might also be some overlap between Regional titles and Travel Guides, so these categories might be overrepresented in the survey. Four publishers (26.6%) selected Travel Guides as a niche category; three respondents (20%) identified Regional, Health, or Science as niche categories, two publishers (13.3%) identified Spirituality as a niche category; one publisher (6.6%) identified Children’s Picture Books, Language Learning, or Religious as a niche category.

**Titles in Print**

The survey also asked how many titles respondents currently had in print. Sixteen out of the 18 total publishers (88.8%) surveyed responded to this question. Answers ranged between as low as three titles to as many as 700 titles. Seven publishers (43.75%) had 1-100 titles in print, one respondent (6.25%) had 101-200 titles in print, two publishers (12.5%) had 201-300 titles in print, two respondents (12.5%) had 301-400 titles in print, one respondent (6.25%) had 401-500 titles in print, one publisher (6.25%) had 501-600 titles in print, and two publishers (12.5%) had 601-700 titles in print.

**Titles Published in 2016**

Sixteen out of the 18 publishers (88.8%) answered the question about how many titles they published in 2016. Answers ranged from zero to forty, with one publisher (6.25%) identifying zero titles published in the last year, one respondent (6.25%) identifying one title published in
the last year, four publishers (25%) identifying two titles published in the last year, two
publishers (12.5%) identifying 3 titles published in the last year, three respondents (18.75%)
selected a range between 10 and 15 titles published in the last year, two publishers (12.5%)
selected a range between 20 and 30 titles published in the last year, two publishers (12.5%)
selected a range between 40 and 50 titles published in the last year, and one respondent (6.25%)
selected a range between 50 and 60 titles published in the last year.

Average Print Run

<table>
<thead>
<tr>
<th>Publishers (sample: 17)</th>
<th>Number of Titles in Print</th>
<th>Number of New Titles Published in the Last Year</th>
<th>Average Print Run</th>
<th>Percentage of E-books of Total Copies Sold</th>
<th>Net Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>3</td>
<td>1</td>
<td>5,000</td>
<td>5%</td>
<td>$25,000-$100,000</td>
</tr>
<tr>
<td>B</td>
<td>8</td>
<td>2</td>
<td>75</td>
<td>5%</td>
<td>Less than $5,000</td>
</tr>
<tr>
<td>C</td>
<td>10</td>
<td>3</td>
<td>2,000</td>
<td>0%</td>
<td>$25,000-$100,000</td>
</tr>
<tr>
<td>D</td>
<td>51</td>
<td>2</td>
<td>40,000</td>
<td>12%</td>
<td>Over $1,000,000</td>
</tr>
<tr>
<td>E</td>
<td>59</td>
<td>13</td>
<td>3,250</td>
<td>10%</td>
<td>$100,000-$500,000</td>
</tr>
<tr>
<td>F</td>
<td>60</td>
<td>10</td>
<td>1,500</td>
<td>5%</td>
<td>$25,000-$100,000</td>
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<tr>
<td>G</td>
<td>99</td>
<td>3</td>
<td>3,000</td>
<td>0%</td>
<td>$25,000-$100,000</td>
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<tr>
<td>H</td>
<td>130</td>
<td>2</td>
<td>2,000</td>
<td>15%</td>
<td>$100,000-$500,000</td>
</tr>
<tr>
<td>I</td>
<td>250</td>
<td>2</td>
<td>300</td>
<td>11%</td>
<td>$100,000-$500,000</td>
</tr>
<tr>
<td>J</td>
<td>251</td>
<td>0</td>
<td>4,000</td>
<td>0%</td>
<td>Over $1,000,000</td>
</tr>
<tr>
<td>K</td>
<td>300</td>
<td>15</td>
<td>2,500</td>
<td>No response given</td>
<td>$500,000-$1,000,000</td>
</tr>
<tr>
<td>L</td>
<td>315</td>
<td>24</td>
<td>3,000</td>
<td>8%</td>
<td>Over $1,000,000</td>
</tr>
<tr>
<td>M</td>
<td>402</td>
<td>22</td>
<td>5,000</td>
<td>1%</td>
<td>$500,000-$1,000,000</td>
</tr>
<tr>
<td>N</td>
<td>500</td>
<td>59</td>
<td>No response given</td>
<td>No response given</td>
<td>Over $1,000,000</td>
</tr>
<tr>
<td>O</td>
<td>665</td>
<td>40</td>
<td>No response given</td>
<td>5%</td>
<td>Over $1,000,000</td>
</tr>
<tr>
<td>P</td>
<td>700</td>
<td>40</td>
<td>No response given</td>
<td>3%</td>
<td>Over $1,000,000</td>
</tr>
<tr>
<td>Q</td>
<td>No response given</td>
<td>No response given</td>
<td>2,500</td>
<td>No response given</td>
<td>Over $1,000,000</td>
</tr>
</tbody>
</table>

Fourteen out of the 18 (88.8%) respondents answered the question regarding the average size of their print runs. Answers varied between 50 and 40,000 copies. For the table, a few publishers selected a range rather than a number for the size of their average print runs. One publisher gave
two averages for different types of titles. In both cases, the average of the two numbers and the print ranges was taken to use in the table. Most print runs in the sample average between 1000-3000 copies.

**E-book Sales**

Seventeen out of the 18 respondents answered the question regarding the percentage of e-books of total books sold. Three of the respondents were not sure what this percentage was. Four publishers selected 0% of e-books of total copies sold, one publisher selected 1% of e-books of total copies sold, one respondent selected 3% of e-books of total copies sold, four publishers selected 5% of e-books of total copies sold, one respondent selected 8% of e-books of total copies sold, one publisher selected 10% of e-books of total copies sold, one respondent selected 11% of e-books of total copies sold, one publisher selected 12% of e-books of total copies sold, and one respondent selected 15% of e-books of total copies sold.

These percentages are all fairly low, making up a small portion of the publishers in the sample’s book sales. This could be attributed to a variety of factors, from titles that do not lend themselves to digital formatting to an overall dip in the e-book market. In a 2018 survey, the Association of American Publishers found that e-book sales are down in all trade categories except for religious presses compared to sales in the previous nine months, with an overall total decline of 5.5%. This trend, combined with our data, indicates that perhaps publishers are focusing more heavily on print formats than digital formats, although further research would need to be done to verify this.

**Distribution**

Book sales might be related to book distribution models. Two of our 18 respondents did not answer the question regarding distribution. Of the 16 remaining respondents, six do not use distributors. The reasoning for this varied; some do not use distributors because there are not any in the region so the costs outweigh the perceived benefits, some sell primarily non-book items so book distributors are not particularly applicable, and some prefer to use internal marketing managers and departments. There was some overlap among the eight publishers that do use distributors. One uses Consortium, two use the National Book Network, three use Ingram, two use the Independent Publishers Group, and two use Publishers Group West. It was postulated that there might be a connection between publisher size and distribution or publisher net sales and distribution, but neither correlation could be made. It seems that there are many ways to get books into the hands of book buyers, and using a distributor works well for some publishers, while it does not work well for others (see Appendix 2).

**Sales Channels**

<table>
<thead>
<tr>
<th>Sales Channels</th>
<th>Through which sales channels do you typically operate?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample Size</td>
<td>17 publishers, 107 responses</td>
</tr>
<tr>
<td>Publishing House</td>
<td>6</td>
</tr>
</tbody>
</table>
There are a variety of sales channels publishers may pursue. Seventeen out of the 18 respondents (94.4%) answered the question focused on sales channels. Fifteen respondents (88.2%) identified Amazon as a sales channel; 13 respondents (76.4%) identified independent bookstores as sales channel; 13 respondents (76.4%) identified chain bookstores as a sales channel; 12 respondents (70.6%) identified websites as a sales channel; 12 respondents (70.6%) identified specialty retail as a sales channel; 11 respondents (64.7%) identified libraries as a sales channel; six respondents (35.2%) identified publishing houses as a sales channel; five respondents (29.4%) identified schools as a sales channel; three respondents (17.64%) identified other online booksellers as a sales channel; three respondents (17.64%) identified professional organizations as a sales channel; three respondents (17.64%) identified museum stores as a sales channel; three respondents (17.64%) identified gift stores as a sales channel; two respondents (11.8%) identified big box stores as a sales channel; two respondents (11.8%) identified direct to authors as a sales channel; two respondents (11.8%) identified event sales as a sales channel; one respondent (5.9%) identified churches as a sales channel; and one respondent (5.9%) identified national parks as a sales channel.

A large majority of the sample use Amazon as a way to reach their customers, although it is impossible to say how effective that sales channel is, particularly since it is fairly easy to make a title available through Amazon. Independent and chain bookstores are also frequently cited sales channels as are websites, specialty retail, and libraries. It is no surprise that publishing houses are not cited as much because many book buyers have little awareness of publishing house brands. Big box sales and schools seem to be underrepresented; however, both require specific types of titles which might not be representated in this particular sample. The least cited sales channels, churches and national parks, are both very niche markets but they exemplify how alternative sales channels can be effective if one has a clear target audience.

Areas of Growth
Only nine out of the 18 respondents (50%) answered the question about areas of growth. The largest area of growth respondents identified was net sales (nine respondents), with number of titles per year as the next largest area of growth (six respondents), and then freelancers or staff as an area of growth (four respondents), with one respondent selecting other (e-books) as an area of growth.

**Challenges Publishers Face**

<table>
<thead>
<tr>
<th>Challenges (sample size: 16, responses: 30)</th>
<th>What were the primary challenges for your publishing house in 2017?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff Turnover</td>
<td>1</td>
</tr>
<tr>
<td>Book Loss</td>
<td>1</td>
</tr>
<tr>
<td>Warehouse Space</td>
<td>1</td>
</tr>
<tr>
<td>Too Much Work</td>
<td>1</td>
</tr>
<tr>
<td>Discoverability</td>
<td>1</td>
</tr>
<tr>
<td>Meeting the Pace of Growth</td>
<td>1</td>
</tr>
<tr>
<td>Finding Staff</td>
<td>2</td>
</tr>
<tr>
<td>New Distributors or Sales Reps</td>
<td>3</td>
</tr>
<tr>
<td>Technology</td>
<td>4</td>
</tr>
<tr>
<td>Rising Costs</td>
<td>5</td>
</tr>
<tr>
<td>Small Staff</td>
<td>5</td>
</tr>
<tr>
<td>Declining Sales</td>
<td>5</td>
</tr>
</tbody>
</table>

Respondents identified 12 areas where they faced challenges in 2017. Sixteen of the 18 publishers (88.9%) responded to this question. Five respondents (31.3%) identified rising costs as a challenge in 2017; five respondents (31.3%) identified small staffs as a challenge in 2017;
five respondents (31.3%) identified declining sales as a challenge in 2017; three respondents (18.8%) identified new sales distributors or sales reps as a challenge in 2017; three respondents (18.8%) identified technology as a challenge in 2017; two publishers (12.5%) identified finding staff as a challenge in 2017; one publisher (6.3%) identified book loss as a challenge in 2017; one publisher (6.3%) identified warehouse space as a challenge in 2017; one publisher (6.3%) identified too much work as a challenge in 2017; one publisher (6.3%) identified discoverability as a challenge in 2017; one publisher identified staff turnover as a challenge in 2017 (6.3%); and one publisher (6.3%) identified meeting the pace of growth as a challenge in 2017.

There wasn't much overlap in this section; however, it is fruitful for making recommendations regarding best practices and indicating areas for future research. Costs are a challenge for many publishers and figuring out ways to reduce costs while still reaching book buyers is essential. Similarly, many publishers are understaffed and could use practical instruction on how to use the staffs they have to their greatest potential. The industry is also constantly changing, and staff turnover seems to be another difficulty publishers must learn to contend with. Figuring out systems that work and can be easily explained to new hires seem to be an essential part of any publishing house’s best practices.

Cultural and Community Involvement

This section focuses on the respondents’ cultural and community involvement, including physical space and events in the community, charitable giving, educational programming, social media and outreach, and local lists and authors. What follows is a comprehensive look at the respondents’ answers.

Physical Place in Community: Space & Events

Of 16 respondents, only four said their press had an actual bookstore, one said they had some stock at their headquarters, and two others said that while customers could visit their offices, it wasn’t a bookstore. The nine other respondents said no—they didn’t have a bookstore or physical space for the public in any shape or form. There are some telling commonalities between these responses. First, those who reported having a physical bookstore were all well-established companies that had been around for at least 50 years. They also reported significant revenue that likely also affects the physical space they can provide. Indeed, three of the four presses made upwards of $100,000 in net sales (two over $1 million). While the last bookstore-running press reported net sales of $50,000–$100,000, it is affiliated with a scientific research university that may explain the financial capacity to have a bookstore. Others indicated that while they did not have a bookstore, per se, they did allow customers in to visit or browse a small amount of stock in their offices. One respondent noted that they host a bookstore of sorts at special events. Of course, this kind of popup bookstore wouldn’t be considered a “dedicated physical space,” but it would certainly be interesting to see how many other publishers might do this sort of special occasion store even if they don’t have a permanent physical space.

<table>
<thead>
<tr>
<th>Dedicated Public Physical Spaces (sample: 16)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bookstore</strong></td>
</tr>
<tr>
<td>4</td>
</tr>
</tbody>
</table>
Public Welcome in Office | 3
No dedicated physical space | 9

Each of these “yes” and “sort of” responses are somewhere in the middle-to-upper range of net sales for a survey respondent—over $100,000, with half over $1 million. The finance factor is significant here, as a dedicated physical space requires paying for the physical space. It is also worth noting that most of these respondents are well-established. The fact that, after decades of existence, four of these presses choose to keep a physical bookstore indicates that something about these stores is working and merits being kept around. These companies also tend to have fairly large full-time staff (between 10 and 50), which may also factor into their ability to run a bookstore on top of a press.

Survey respondents were also asked about their participation in literary events. Twelve out of 16 respondents said that they were involved in local literary events in some capacity, while the four others said outright that they did not. One of the most common events to mention was literary festivals and trade shows—indeed, seven respondents total cited literary festivals as their primary literary event participation. Only four mentioned smaller-scale events like author signings/readings. One respondent noted that they host publisher happy hour events in their city. This kind of small-scale community involvement is likely not unique to this publisher and could be teased out in future iterations of this survey.

<table>
<thead>
<tr>
<th>Participation in Local Literary Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>Literary Festivals</td>
</tr>
<tr>
<td>Author Evens</td>
</tr>
<tr>
<td>Publishing Socials</td>
</tr>
<tr>
<td>Workshops/Conferences</td>
</tr>
<tr>
<td>No Reported Participation</td>
</tr>
</tbody>
</table>

Giving Back to Community: Charity & Education

Though there was some confusion with regard to community events, there was a great deal of enthusiasm when talking about another way publishers can interact with the community: charitable giving. This is an especially interesting aspect of a company’s community involvement. While literary festivals and author events may have a direct impact on a company’s sales, charitable giving has a much less direct connection. Involvement with charity can of course boost a company’s reputation and brand, but it is also a great indicator of a company’s commitment to its community, and a way to express and further the publisher’s mission. Several presses at the lowest end of the sales spectrum (less than $100,000) said they did not participate in charitable giving. At virtually every level, however, some form of charitable giving was taking place. Indeed, only four out of 16 respondents to this question said they did not engage in any charity.

<table>
<thead>
<tr>
<th>Engagement in Charitable Giving (sample: 16, responses: 20)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donated Books</td>
</tr>
</tbody>
</table>
Many smaller publishers found ways to give charitably that weren’t strictly financial. For instance, many making less than $100,000 in net sales gave books to charities and auctions, worked with local schools for education and reading programs, or hosted book drives for kids. Those in the middle of the spectrum tended to donate books and provide education and reading programs. Larger publishers’ charitable giving tended to be more financial: donating thousands of books, setting aside a portion of the annual budget, or matching donations of employees. This makes sense—companies with capacity for significant financial contributions tended to go a monetary route, while smaller publishers with less of a budget found other ways to give back. There was one significant outlier: one publisher making over $1,000,000 annually gathered its employees to volunteer as a group at local charities on a regular basis. This indicates that this publisher found that the best approach to charitable giving—though it had the funds to go a more monetary route, like other respondents on the higher end of the spectrum—involved the community. This decision was clearly not made based on lack of funds, but some other value was found in being active in the community.

Giving to charity—and volunteering for charities—is not the only way PubWest members are giving back and involving themselves in their communities. Some are also finding ways to engage through educational programming.

### Involvement in Educational Programming (sample: 17, responses: 20)

<table>
<thead>
<tr>
<th>Category</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Children Education</td>
<td>5</td>
</tr>
<tr>
<td>Publishing Education</td>
<td>5</td>
</tr>
<tr>
<td>Educational Materials</td>
<td>2</td>
</tr>
<tr>
<td>No Educational Programming</td>
<td>8</td>
</tr>
</tbody>
</table>

Five respondents noted that they were involved in children’s educational programming to some extent. Some involved speaking engagements, while others helped create material for educational kids’ camps. Other respondents indicated that their educational involvement was more industry-focused, including participating in webinars, writers’ groups, and conferences. Five respondents indicated that they were not involved in educational programing, and three indicated some level of confusion with the question, so the responses were limited as a result.

**Contacting the Community: Social Media & Outreach**

Engagement with the community doesn’t necessitate physical space or financial contributions. When asked how they engage with readers/fans/supporters, all 15 respondents indicated that they made some effort to engage with their readers. 13 of these respondents specifically mentioned social media, and 12 said that they held or participated in events (from smaller author events to literary festivals). Seven noted that they use e-newsletters. Social media and events were the clear standouts, though information on the types and frequency of both social media and events used is lacking; additionally, because social media and events were given as examples in the
question about engagement with readers, it could lead some respondents to focus on those aspects of engagement more than others.

| Engagement with Readers (sample: 15, responses: 37) |
|-----------------|---------|
| Social Media    | 13      |
| Events          | 12      |
| E-Newsletters   | 7       |
| Every Way Possible | 3   |
| Minimally       | 2       |

Some of the most interesting responses were also the most vague; three responses indicated that they tried to engage with readers “every way possible,” and while this isn’t quantifiable, it does indicate a certain level of enthusiasm and investment in their community engagement. Language like “possible” and “that we can” also hints at limitations—that the methods of engagement are somehow dictated by limitations of time/knowledge/finances/access, though the survey respondents don’t go into specifics. Two others just indicated a general lack of engagement. Respondents weren’t just interested in promoting their own agendas. Instead, there is a marked interest among the survey respondents in supporting and promoting others in the publishing community as well. Thirteen out of 16 responses indicated that they promoted others in the community as some level, and only one indicated that they really didn’t engage in this way (two were confused about the question).

| Engagement with and Promotion of Others in Publishing |
|-----------------|---------|
| Sharing Information | 3       |
| Social Media     | 3       |
| Events           | 3       |
| Networking       | 2       |
| PubWest          | 5       |
| Internships      | 1       |

From the majority of respondents, there seems to be a real enthusiasm for promoting other publishers’ work. PubWest was prominent here as an organization that helps the respondents find, engage with, support, and promote others in the publishing community. Several respondents consider PubWest to be the primary avenue through which they engage with the community as a whole. This indicates a level of reliance on PubWest as both a good/essential way to engage with other members of the publishing industry, and for many, it’s the only way that they mentioned—meaning that PubWest is a primary engagement method in the minds of many respondents. Networking seems to be a keyword for a lot of the respondents, but many didn’t dig deeper into what that means. Several mentioned social media as great modes of promoting other publishers, sharing events and posts.

*Publishing the Community: Local & Vocal*
Respondents were asked about their emphasis on locality in terms of list and local authors. Out of 15 respondents, five enthusiastically said they’ve published local authors, and another six indicated that while it wasn’t a particular emphasis for them, they have published local writers. Two vaguely indicate that they publish everyone and didn’t get specific, and two others said they had not published local authors. Those who firmly said they didn’t publish local authors are both new, having been established since 2000.

<table>
<thead>
<tr>
<th>Publishing Local Authors (sample: 15)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>Sometimes</td>
</tr>
<tr>
<td>No</td>
</tr>
</tbody>
</table>

Locality doesn’t seem to be a major factor, even for some of these smaller presses. For most, publishing local authors was present, but not a particular emphasis, and it was difficult to ascertain whether the presence of examples of local authors was indicative of the list as a whole without more contextual information. Some responded with “rarely” to this question, again indicating that the press might not have a particular focus on local or regional work. However, it’s necessary to distinguish here between work that is locally focused and local authors. Several of the respondents that have published fewer than 100 books total could name several local authors. More interesting even than the numbers is that several of the respondents expressed excitement about being able to do publish local authors: “almost all of our authors are local;” “yes, many,” and “We have our first local author!” This was the most indicative of the intent and passion of publishing local authors.

Case Studies

Five respondents provided information for the case study section, offering detailed data for a title that stood out among the rest of their titles. Of these five titles, three exceeded expectations and two fell short. To determine potential best practices, it's useful to look at the similarities between the three successes and two failures. Since there were only five examples to draw from, any analysis of these case studies will provide an incomplete picture that is not necessarily representative of every project. There are many other determining factors at play—including company size, distribution, etc.—that are not taken into account in this case study analysis. Still, this analysis may be useful to publishers as they form strategies for upcoming titles. In the interest of anonymity, specific details about each title has been withheld.

Of the two case studies that fell short of expectations, both cited a failure to reach their expected audience. One limitation was region and another was an inherently small, hard-to-reach market. Both of these cases also cited marketing challenges; one was written by a first-time author, and the other had low author participation in the book’s promotion. Both cases cited robust marketing efforts on the part of the publisher—however, these efforts are viewed as initially inadequate or at least not as effective as the author’s efforts were or might have been.
Of the three titles that exceeded expectations, all cited author participation in marketing efforts, including speaking events, interviews, and social media. One of the successes was from an author who had already published two books, and another was from an author who already had built a robust platform from speaking events. The remaining successful title was written and illustrated by a debut author and illustrator, but their roles in self-promotion on social media and through their personal networks played a large role in the title’s success. Two of the successes were adopted in educational or academic curricula. All three reported that their titles sold well nationally.

It’s clear that author participation in marketing efforts plays an important role in a book’s success; titles that lacked author participation fell short of expectations, while those that incorporated the author in marketing efforts exceeded expectations. Audience and regionality also appear to have played a role—the three successes had broad appeal, while the two that fell short of expectations were aimed at relatively narrow audiences that may have been difficult to reach. Again, it’s important to note that this analysis may not yield observations that are necessarily true of all titles, as this is such a limited sample size and success in book publishing depends on so many factors that are impossible to comprehensively analyze.

BEST PRACTICES

Operations

As expected, most respondents (15 of 18) reported earning most of their income from book sales, and four of 18 reported earning 100% of their income from book sales—including two companies that reported more than $1 million in 2016 net sales. Merchandising is the second-most reported source of income, with three companies—all with million-dollar sales—claiming more than half of their income from merchandising. The next notable source of income is public-sector funding, with three companies claiming this as 17%, 10%, and 5% of their income. Two of the million-dollar companies reported public-sector funding as 17% and 10% of their income, respectively. While income from book sales is still an essential portion of income for many publishers, the data from the survey shows that diversification of income sources can be a best practice in the often tumultuous and everchanging publishing environment.

Looking at company age and 2016 net sales, it’s clear that the older companies reported the highest sales. The earliest company in the sample—established in 1865—claimed more than $1 million in 2016 net sales. Four companies, all established between 1980 and 1993, also reported more than $1 million in sales. The newest company to claim more than $1 million in sales was established in 1993. The other two million-dollar companies were established in 1938 and 1968. The most recently established companies were among the lowest earning—2 companies established in 2013 and 2014 reported $25,000–$50,000 and less than $5,000, respectively. This reiterates the fact that publishing is a low profit-margin business that takes time to develop and make economically successful.
Each respondent asked what elements of their operations and practices they believe sets their organization apart. Two companies that reported more than $1 million in sales cited being part of a larger organization as a differentiating element of their operations. Two million-dollar companies also cited their nonbook products as something that differentiates them from other publishers. Also, two of the million-dollar companies mentioned their publishing focus or niche. It’s also interesting to note that two of the higher-earning companies—one million-dollar company and one $500k+ company—cited some aspect of their practices that they do in-house: distribution and retail, respectively. Here, it becomes clear that diversification of income areas, a niche focus, and relationship with larger organizations are a few of the key operational aspects of PubWest survey participants that set their practices apart from others.

List

As noted in the findings section, it was thought that there might be a correlation between net sales and the number of publication categories a publisher published in; however, no such correlation was found. This is significant because it means that diversifying the types of books one publishes does not necessarily lead to increased sales. In fact, the data suggests that publishers can be successful—using net sales as a marker of success—whether they publish in just one category, five categories, or ten categories. It seems, then, that the key to success lies not in how many categories one publishes in, but in other factors. It is important to note that net sales are not the same as revenue, so they might not be an accurate marker for success. Still, if diversification does not necessarily lead to increased sales, it is worthwhile to think about what might accomplish this.

One method that publishers who do not diversify in terms of the categories they publish in might still do well in terms of net sales, lies simply in knowing their target market. Some of the publishers in the sample have very niche categories, where they are likely to have a good sense of who their target market is. While this is not novel information, it is a useful reminder that knowing one's market is essential for book publishers. Similarly, these publishers also seem to have reliable methods for reaching their target market. Again, this is not a novel concept, but a good practice to incorporate into any publisher's marketing efforts.

It was also postulated that there might be a correlation between net sales and using a distributor, which was not the case. Some of the publishers in the sample were part of a larger organization and had other structures in place to distribute their titles. Still others sold non-book items as well as book items, so traditional book distribution models were not the most efficient or effective means for distributing their products. This suggests that distributors can offer value to publishers, but using a distributor is not the best practice for all publishers. The data also suggests that some of the publishers who did not use distributors might benefit from doing so. It seems that the perceived value of a distributor might be less than the actual value of a distributor, indicating value in publisher training and education regarding distribution models. Again, it seems that the best practice is to know one's target market and the best way for reaching that market.

Community
Many PubWest members are smaller presses, lacking the kind of financial resources that can allow for large-scale community engagement projects. This likely contributes to the overwhelming number of survey respondents who cited social media as a main method of community outreach and engagement. Nonetheless, there emerged a common thread throughout the survey: an interest in in-person events and physical spaces for engaging with community. Based on how varied the responses were and the range of publishers who made an effort to engage in person with the community, there is a great deal of value placed on these kinds of interactions.

Some of the more expected responses revolved around literary festivals, trade shows, and author events, which are all relatively standard facets of the publishing business. However, survey responses brought up other aspects of in-person engagement. A surprising number of respondents all across the board (press location, net sales, etc.) cited educational involvement in some form. Among educational outreach opportunities mentioned in the survey were participation in publishing programs, speaking at schools, hosting webinars, association with writers’ groups, partnering with organizations to create educational kids’ camps, teaching workshops, publishing educational material, and free community programs about the material they publish. The volume and variety of responses suggest a certain high value placement on these kinds of community-facing events, even tangential to the actual work of publishing. The variety of responses, too, shows that there is no one way to go about involvement in educational outreach as a publisher. This is good news for smaller presses, who may worry that they cannot fund any focus on educational outreach, when in fact there are a plethora of ways to get involved. The key here seems to be participating where possible. While data has not been collected on what publishers get out of educational programming, some conclusions are obvious. For example, children’s publishers that participate in educational camps for kids make connections with those kids and their parents, associating their brand with that programming. One might speculate that there’s something about a publisher being involved in the community that’s good for image, emphasizing that locality and dedication to the community that may help to bring them into the esteem of the public—especially useful if the portion of the public targeted also falls into their general audience.

Similarly, publishers also cited a range of kinds of avenues for charitable giving. For the most part, the kind of charitable giving the respondents participate in was somewhat contingent on the size of their press. For instance, the smaller publishers said that they gave books to charities and auctions, worked with local schools, or even hosted book drives. More mid-range presses also cited book donations, education, and reading programs. The largest presses that responded noted that their contributions were largely financial—either through setting aside a portion of the annual budget, matching employee donations, donating thousands of books, and the like. All of this is fairly predictable, and may make it seem like what the larger presses can do is more valuable. However, there is one significant outlier that may shift this view.

One of the larger presses (more than $1 million in net sales) cited, instead of a large financial contribution, but rather a contribution of time. According to the response, the company’s employees regularly gather to volunteer as a group for local charities. This is clearly not due to lack of funds, as this was one of the presses with the most funding. Thus, the decision to give
back in a more symbolic, outward-facing, community-serving manner was based less on finances and more on some inherent value found within the act of volunteering with the community directly that cannot be found in simple financial contributions. Like with educational programming in the community, one can speculate that this kind of local volunteer work is seen as a method of building the press’ image and gaining the public’s esteem. Regardless of the exact motivation, it is clear that the press found value in the in-person community involvement of volunteer work. This is something for small presses and large presses alike to think about moving forward: when deciding on charitable giving for the year, regardless of funding or lack thereof, it may be worthwhile to consider donating time to the surrounding community rather than just financial or material contributions. It may be that donating time instead of money is more financial viable, but there may be some less definable value to be found there as well.

When asked about how they promoted fellow community members, nearly half of respondents directly cited PubWest as an avenue for this engagement. There was a marked enthusiasm for PubWest, indicating a certain reliance on PubWest as a good and/or essential method of engagement with others in the community. This widespread interest and excitement for PubWest is an excellent thing to keep in mind—especially because other questions about community involvement didn’t draw respondents to mention PubWest. This may indicate that there is untapped possibility in PubWest as a community, that members could use and partner with their connections through PubWest in more direct ways for events and other outward-facing community engagement. The fact that respondents showed such enthusiasm for this organization may show that this group of publishers is ready to further explore partnerships with each other, in person, online, and otherwise.

**CONCLUSION**

While the 2017 PubWest Best Practices Survey involved a limited sample size, there is much to be gleaned from the data about best practices. The pool of respondents may not be perfectly representative of PubWest as a whole, but it does give an idea of some common threads linking all or most of the publishers. Even from this limited survey response, it is safe to say that PubWest publishers come in a huge array of sizes, and any publisher can benefit from association with this organization.

PubWest members vary greatly in size, mission, publications, and financial assets, but between them, there are plenty of resources within the community. Many face similar challenges, like rising costs, small staff, or declining sales. It is important to remember, and it is clear from this survey’s responses, that PubWest members bring a wealth of knowledge, experience, and resources to the table, offering much opportunity and advantage for collaboration. Indeed, going forward, members can keep in mind that others involved with PubWest are just as excited about it, and may provide useful partnerships. Many PubWest members are located near each other, and those farther out from the Pacific Northwest may still find that purposeful engagement with fellow members on social media or elsewhere beneficial. As a whole, PubWest members are excited about the organization as an avenue for engaging with and supporting others in the wider publishing community. Opportunities abound for expanded collaboration with PubWest members in the years to come.
Appendix 1: PubWest Best Practices 2017 Survey Questions

Portland State University and Oddian Press will be the third-party collector and analyzer of the PubWest Best Practices Survey. Data from the survey will be analyzed and then released back to PubWest members to further gauge and inform publishing practice.

Introduction

We are excited to present you with an updated PubWest Best Practices Survey! This is not your typical publishing industry survey. For starters, we’re interested in capturing data about PubWest’s base—that is, small- and medium-sized book publishers. We’ve also created a survey that won’t require you to look up any spreadsheets or add up any figures. Instead, we believe the most useful information in any survey of the publishing industry is found in the responses to open-ended questions. A link to the survey is provided below, please complete the form online and submit it right now.

All survey responses will be anonymous, and the information you provide will not be shared outside of this survey. You can opt out of any question. When we share the results, we will use your answers about net sales and the categories in which you publish, for example, to inform our analysis of different parts of our complex industry. We will also share verbatim responses to many open-ended questions, which we hope will stimulate new ideas among PubWest publisher members. We also look forward to sharing with you the data we gather on such topics as average salaries for various job titles.

Thanks in advance for the time you take out of your busy day to complete this survey. Next year it will be even more efficient, because we’ll reissue the survey with this year’s responses in place—making it easy for you to update your answers as necessary—along with a new section for more specific, timely inquiries. We hope the PubWest Best Practices Survey will become a regular and valued part of the services PubWest offers its publisher members.

Best regards,
Kent Watson, Executive Director of PubWest

Identifying Details

Name

Job title
Email address

Phone number

Full name of your publishing house

**Operations and Practices**

Location of your publishing house

Year in which your publishing house was established

**2016 net sales (total revenue less discounts and returns) on books, merchandise, publishing services, and rights**

- Less than $5,000
- $5,000-$10,000
- $10,000-$25,000
- $25,000-$50,000
- $50,000-$100,000
- $100,000-$250,000
- $250,000-$500,000
- $500,000-$1,000,000
- Over $1,000,000

**Estimated percentage of your publishing house’s income comes from**

- Book sales
- Non-book merchandise sales
- Author fees
Public sector funding
Private sector funding
Subrights
Custom publishing
Other (please specify)

Staffing

Number of full-time staff
Number of part-time staff
Number of freelance staff

Please record the job titles of everyone who works on a full-time basis for your publishing house. (If you have, for example, two editorial assistants, you should record the job title only once). For each job title, record the approximate annual salary.

Please list any publishing-related organizations (e.g., AAP) to which you belong, in addition to PubWest.

What elements of your operations and practices (not genre or mission) serve to differentiate you from other publishers?

List and Audience
Into which categories do your publications primarily fall? (Check all that apply.)

- Fiction
- Narrative nonfiction
- Technical or scientific
- Poetry
- Children's
- Photography or art
- Cookbooks
- Academic
- Educational
- Regional nonfiction/Travel
- Other (please specify)

Within these categories, do your titles fit into particular niche categories? Do they appeal to particular niche audiences?

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<table>
<thead>
<tr>
<th>Number of titles in print</th>
</tr>
</thead>
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<table>
<thead>
<tr>
<th>Number of new titles published in the last year</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Average print run</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Percentage of ebooks of total copies sold</th>
</tr>
</thead>
</table>
If you use a distributor, which one(s)? If not, why not?

Through what sales channels do you typically operate (e.g., publishing house website, independent bookstores, chain bookstores, Amazon, other online booksellers, big box stores, specialty retail, schools, libraries, professional organizations, etc.)?

In which areas has your publishing house seen growth from 2016 to 2017? (Check all that apply.)

- Number of titles per year
- Number of staff or freelancers
- Net sales
- Other (please specify)
- None of the above

What were the primary challenges for your publishing house in 2017?

Cultural & Community Involvement

Does your publishing house maintain a dedicated physical space that is open to the public (e.g., bookstore, reading room, etc.)?
Do you host, organize, and/or participate in literary events in the local community? If so, please provide examples.

Do you engage in any charitable giving (including sponsorships or partnerships with local or regional organizations)? If so, please provide examples.

Are you involved in any educational programming? If so, please provide examples.

Are you connected to or part of another institution or business, such as a larger publishing house, media conglomerate, nonprofit organization, or university? If so, which one(s), and what is the nature of your relationship?
How do you engage with readers/fans/supporters (e.g., social media, events, etc.)?

Do you engage with or promote other members of the publishing community? If so, where and in what ways?

Do you publish local authors? If so, please provide examples.

Do you publish books with local or regional subject matter? If so, please provide examples.

Case Study

Please describe in as much detail as possible the life of a particularly interesting title published in the last year. You are encouraged to explain what makes your selection stand out from the rest, including the criteria by which your publishing house defines the success or failure of its titles. Also, be sure to identify any aspects of your publishing and marketing process that differentiate this title from others you have published or from the processes of other publishing houses.

Please include all of the following information in your account:
1. Title, format(s), and release date(s)
2. Author name(s) and their publishing history
3. Category, genre(s), and sub-genre(s) (as appropriate)
4. Sales goals vs. sales figures
5. Has this title done well locally? Nationally? Internationally?
6. Where did this title’s most impactful review(s) appear?
7. Other impactful marketing, publicity, or advertising initiatives
8. Did this title win, or was it nominated or shortlisted for, any awards?
9. How has the author’s career been affected by the publication and reception of this title?
10. Has this title been adopted for any educational programming or academic curricula?

Feedback

Do you have any feedback about the PubWest Best Practices Survey? Are there any questions that you would like to see us ask in next year’s PubWest Best Practices Survey?
Appendix 2: List of distributors from the survey data

Consortium
National Book Network (NBN)
Small Press United (SPG)
Ingram
Publishers Group West (PGW)
Christian Book Distributors
Barnes and Noble Distribution
Independent Publishers Group (IPG)
University of Toronto Press (Canada)
Novalis (Canada)
Turnaround (UK)
Alban (UK)
John Garratt (Australia)
Appendix 3: Associations that respondents belong to (other than PubWest)

Community of Literary Magazines and Presses (CLMP)
Independent Book Publishers Association (IBPA)
Association of Catholic Publishers
Association of American Publishers (AAP)
Geologic Society of America
American Association of State Geologists
Earth Science Editors
Independent Book Publishers Association (IBPA)
Book Publishers Northwest (BPNW)
Northwest Independent Editors Guild
Association of Canadian Publishers (ACP)
Association of Book Publishers of British Columbia (ABPBC)
Appendix 4: Heat maps of survey respondents and all PubWest members