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# WHAT DO BOOK PUBLISHERS DO AND HOW IS THE BOOK EVOLVING?

Angus Phillips

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## ABSTRACT

This PhD by Publication captures an ongoing exploration of the book industry and the changes affecting the book itself. Two central questions are examined: What do book publishers do? How is the book evolving? The thesis shows the coherence of the research questions, demonstrates the linkages between the published works, and how they contribute to the overall field of publishing studies.

The thesis is constructed around nine works published over a 17-year period: three monographs, five book chapters, and one journal paper. Overall the works add coherent analysis and new insights to our understanding of the book industry, devising models, offering new interpretations, and moving on beyond simple descriptions of what publishers do. The publications show why publishing operates in certain ways, how publishers can and do add value, and what challenges they face from digital and other developments. The business model of the book remains robust, and the printed book continues to demonstrate resilience as part of a broader family including ebooks and audiobooks. Long-term trends in the UK publishing industry are identified through analysis of time series data to establish what correlation if any exists between the national income of a country and its sales of books.

The methods employed in the research include semi-structured interviews, case studies, industry data and archival research. These are discussed in detail outlining some of the decisions made and the background to the methods.

New concepts are advanced in the works alongside structured analysis of the industry and its operations. The publications not only explain what publishers do and how they add value – they also show why some functions are carried out by third parties. Theoretical models advanced include the value chain in publishing, which shows how publishers add value to content. The concept of digital capital shows how publishers need to connect with readers, and the importance of the co-creation of value. A tripartite concept of the book goes beyond a technical definition to advance a dynamic model which shows how a book is not just an information architecture but also occupies a special place in society, which grants it privileges such as lower taxation and prestige, and has a distinct business model.

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I dedicate this work to my mother, Sheila Phillips, who blazed a trail by being one of the limited number of female students at Oxford University in the years immediately following the Second World War. Only 14 per cent of admissions at undergraduate level were women students. In 1927, the year of my mother's birth, the University had voted to limit the number of women at the University to 840; the quota was not removed until 1957.

# 1 INTRODUCTION

This thesis encompasses a range of publications from 2006 up until 2022, constituting a significant body of work that examines the publishing industry and how the book continues to evolve. The focus of the narrative is to contextualize the publications, show their coherence, and demonstrate an original contribution to the field of publishing studies. The period of the published work has seen continuous change within the publishing industry, the arrival of large technology players in the market, and sales growth in formats such as ebooks and audiobooks. This timescale has also seen the emergence of the field of publishing studies, which now has its own identity and body of research.

This Introduction sets out the general background to the enquiry including the industry context, the evolution of the book, the development of publishing studies as a discipline, and the list of publications included in the critical appraisal.

## 1.1 INDUSTRY CONTEXT

As a creative industry, book publishing in the UK is notable for both its economic impact and its wider influence (Phillips, 2022), covering a range of types of book from the academic monograph to the latest children's bestseller. The business is international and any analysis of the industry requires consideration of trends across borders rather than just viewing the UK in isolation. The level of risk varies by sector and traditionally trade publishing has carried higher levels compared to other areas.

The publishing industry as a whole has faced challenges from other media, user-generated content and the rise of digital access. Where it was once TV and film, rivals for consumer attention now include social media and gaming. Authors are attracted by the money on offer from services such as Netflix and Amazon, whilst many are self-publishing rather than seeking a mainstream publisher. Yet commercial publishers continue to offer authors validation of their work, editorial and marketing support, and retail exposure (Clark and Phillips, 2019). Many authors would prefer to concentrate on writing rather than having to market and promote their own work; and publishers bear the risk of publication in print whilst giving access to high street retail. The survival of bookstores remains uncertain and in many countries they have to sell a range of non-book stock to make a profit.

In academic book publishing, research monographs continue to survive despite falling print runs and high pricing from publishers (Shaw, Phillips and Gutierrez, 2022 and 2023). Digital printing and print on demand (POD) facilitate lower print runs and already some academic publishers aim not to hold any printed stock. We will arrive at a point where the book goes digital with only a few copies printed for the author. Already the larger publishers often fold new books into their online libraries. The environment for higher education textbooks is difficult with increased competition from rental sites and diminishing demand from students, who expect their universities to provide free online access. Educational and academic publishers have moved from selling discrete products to the sale of services: such as testing materials for schools or a comprehensive database of book and journal content, accessed anywhere on a range of devices (Cope and Phillips, 2014).

The book industry has special features such as subsidies from some national governments, a favourable tax regime in many countries, and general agreement that the book retains an important place as the carrier of knowledge and information (Phillips and Kovač, 2022). Some national publishing markets are still transitioning towards digital products and their structures may be based around a strong public library market and government spending on resources for education; publishers may also retain interests in bookselling and printing. Whereas in the UK there has been consolidation of publishing within market sectors, in other markets there is often the tradition of smaller and family-run companies both in publishing and bookselling (Banou and Phillips, 2008).

## 1.2 THE EVOLUTION OF THE BOOK

Digital access means that books have a ready global market, and some genres such as romance have shifted sales from print to the ebook. Yet the printed book has remained resilient whilst offering a reliable business model for publishers. Whether read on holiday or for study, or adapted for TV and film, books continue to play an important role in our society and culture. In a world of content abundance, books retain an authority when viewed alongside the commoditized content often found on the internet. Audio offers a new revenue stream and the opportunity to reach younger audiences. The book in physical form offers a respite from screens, the opportunity to enter the world of the imagination, and the home of long-form writing as this disappears from newspapers and magazines. The book survives and is experiencing the revitalizing effect of BookTok, which has given prominence to works from publishers' backlists.

The future of the book is intimately connected with new generations of readers. Book publishers aim for profitability but also believe in their product and the value of reading. What is the place of reading and books in the digital landscape? Intriguingly our quick-fire reading habits on the web open up a clear space for long-form,

immersive reading (Phillips and Kovač, 2022). Reading fiction enables us to enter other worlds and other minds, and immerse ourselves in stories fuelled by the writer's imagination. Serious non-fiction asks us to grapple with ideas, events, and stories of interesting lives. Human beings express their thoughts with words: the more words we know and the more familiar we are with how words change their meaning in different contexts, the more complex thoughts we can express. In short, the depth and breadth of our vocabulary is one of the preconditions for critical and analytical thinking - the larger our vocabulary, the larger and more complex becomes the world we can think about.

### 1.3 THE GROWTH OF PUBLISHING STUDIES

The business aspects are naturally important when focusing on the industry, but also of significance are the cultural and societal dimensions which make publishing so distinctive. If governments in some countries wish to control publishing and publishers, this serves to highlight the valuable and sometimes challenging contribution publishing makes to a flourishing society. Publishing in the UK and other countries gathers controversies around authenticity of the authorial voice and the lack of representation in the industry from all parts of society. Publishing attracts commentary in the blogosphere, on social media and in the press, and there is continuing appetite for information about how digital in particular is changing the industry. The mainstream media remains fascinated by developments in book publishing, whether the death of the book, the death of the ebook, or the rise of audio.

Theory in publishing studies has been adapted or applied from other subject disciplines, and fresh ideas have been put forward to explain what it is that publishers do, and how they can add value in a world of free content and self-publishing. The rapid growth in the number of programmes teaching publishing shows the strong interest from the industry in greater professionalization, and new thinking is required to keep abreast of the changes that have been taking place within publishing, from digitization to globalization. For today's publishing industry, artificial intelligence offers both threats and opportunities as it is likely to affect both content creation and reading. It remains vital for researchers in publishing studies to keep in touch with industry developments from workflows to strategic thinking, from diversity and inclusion to sustainability.

Certainly we have moved a long way in the development of publishing studies and we can contrast the healthy state of the subject in 2023 with that of the year of the first publication included as part of this thesis. Back in 2006 Simone Murray was to conclude:

research about contemporary book publishing is often in the ignominious position of being regarded as a fringe intellectual undertaking by groups themselves wedded to the principle of interdisciplinarity. Acknowledging this institutional precariousness, alongside the inherited lack of theoretical and methodological rigour amidst the vocational wing of publishing studies, it might appear tenuous to talk about publishing studies as a research discipline at all. (Murray, 2006, 3)

Today we can see that publishing has grown as an area of study and there are university programmes to be found in Europe, North America, and China as well as in Australia, Nigeria and South Africa. From research monographs to articles in journals such as *Publishing Research Quarterly* and *Logos*, and the annual By the Book conference, there is a growing volume of high-quality research displaying analysis and theoretical rigour. (Baverstock, 2020) The aim of *The Oxford Handbook of Publishing* (Phillips and Bhaskar, 2019) is to present the field of publishing studies as an important area of research, whilst continuing to draw on theories and insights from allied subjects including media, business, book history, literature, sociology, and library and information science. The book brings together leading international scholars of the subject to present a rounded picture of the ideas and approaches that make up the field of publishing studies.

#### 1.4 CRITICAL APPRAISAL

The main aim of this critical appraisal is to capture an ongoing exploration of the book industry and the changes affecting the book itself. Two central questions are examined:

- What do book publishers do?
- How is the book evolving?

This appraisal will show the coherence of the research within the two overall themes, demonstrate the linkages between the works, and how they contribute to the overall field of publishing studies. Mentions are also made of other publications that are not part of the body of work included for this thesis. Chapter 2 places the corpus of work within the relevant literature; Chapter 3 focuses on methods; and Chapter 4 summarizes the contribution to knowledge.



The following is the list of works covered by this appraisal.

#1 Phillips, A. (2006a), 'Where is the Value in Publishing: The Internet and the publishing value chain', chapter in Cope, B. and Phillips, A. (ed.), *The Future of the Book in the Digital Age*, Chandos.

#2 Phillips, A. (2014), *Turning the Page: The evolution of the book*, Routledge.

#3 Phillips, A. (2017a), 'The Closure of the Printing House', chapter in Robbins, K. (ed.), *The History of Oxford University Press*, OUP.

#4 Phillips, A. (2017c), 'Have We Passed Peak Book? The uncoupling of book sales from economic growth', *Publishing Research Quarterly*, 33:3.

#5 Clark, G. and Phillips, A. (2019), *Inside Book Publishing*, 6<sup>th</sup> edition, Routledge.

#6 Phillips, A. (2019), 'Corporate Social Responsibility', chapter in Phillips, A. and Bhaskar, M., *The Oxford Handbook of Publishing*.

#7 Phillips, A. (2020a), 'Does the Book Have a Future', chapter in Eliot, S. and Rose, J. (ed.), *A Companion to the History of the Book*, 2<sup>nd</sup> edn, Wiley Blackwell.

#8 Phillips, A. (2020b), 'The Modern Literary Agent', chapter in Baverstock, A., Bradford, R. and Gonzalez, M. (ed.), *Contemporary Publishing and the Culture of Books*, Routledge.

#9 Phillips, A. and Kovač, Miha (2022), *Is this a Book?*, Cambridge University Press.

The relevant proportion of effort is 100 per cent for works #1-4, 6-8; and 80 per cent for #5, and 50 per cent for #9 (statements are provided in the Appendix from my co-authors). The works have been subject to peer review at the relevant stages, organized by the book or journal publisher. The publications constitute a considerable body of work and the total word count is over 250,000 words.

## 1.5 BIOGRAPHY

I have an international reputation for my publications, which have contributed to the development of publishing studies. The selection of publications for this critical appraisal was made in order to pursue the two main themes. I have separately published on a diverse range of topics including book covers, journals publishing, reading, and the Greek publishing industry. I was a contributor to *The Oxford Companion to the Book* (Suarez and Woudhuysen, 2010), writing over 30 entries on book publishing.

I am the co-convenor of the international conference on Publishing Studies, *By The Book*, held annually in locations around Europe (in 2022 Paris, in 2023 Porto). I am the Editor-in-Chief of *Logos* – the international journal has a long history and is unique for its mix of contributions from both academics and senior industry professionals. The journal regularly publishes special issues, most recently an issue on sustainability and a double issue on Indian publishing 75 years after Independence. I edited a selection of articles from the journal published as a book (Phillips, 2015). The journal has a CiteScore Percentile of 77% in the category of Literature and Literary Theory (Scopus, February 2023); and in its review of the title, Scopus noted:

This is an especially impressive journal that appears to be in rude health, from the editorial policy and the homepage to the production schedule and online access. Much of the material published is a pleasure to read. Articles are being very well-cited, which is an indication of the importance of the journal in its research field.

I have been the Director of the Oxford International Centre for Publishing (OICP) at Oxford Brookes since 2006. The activities of the Centre include teaching (we run undergraduate and postgraduate awards), academic research, consultancy and training. I have been external examiner for degree courses at the following universities in the UK: Derby, Exeter, Manchester Metropolitan, Plymouth, University of Central Lancashire, and University College London. I have been the external examiner for doctoral theses at Bedfordshire, Cambridge, Edinburgh Napier and Robert Gordon; and at Victoria University of Wellington, New Zealand.

## 2 THE CORPUS OF WORK

This chapter will review each publication in turn, highlighting key points and what makes them distinctive, whilst establishing their coherence within the overall themes of this appraisal. The works are framed within the relevant body of literature and reference is made to key authors and ideas from the area of publishing studies and other disciplines.

### 2.1 KEY AUTHORS IN PUBLISHING STUDIES

Systematic analysis of book publishing is provided by John Thompson (2005, 2012 and 2021), who applies the theory of Bourdieu to the industry (Bourdieu, 1984), identifying the importance of symbolic capital, and drawing out the workings of the field of book publishing. The three books have examined in turn academic publishing, trade publishing and the digital revolution in publishing. The first (2005) highlights the key changes in academic publishing, examining the field from textbooks to journals. The 2012 work identifies three key developments that helped to shape the field of trade publishing. Firstly the transformation of the retail environment with the arrival of large bookselling chains; secondly the arrival of the literary agent as a power broker; and thirdly a wave of mergers and acquisitions leading to the creation of large international publishing groups. Most recently Thompson (2021) sees that digital technologies and innovations enabled established players to do things differently but also encouraged new players to enter the field and challenge the stakeholders already there.

Michael Bhaskar (2013) aims to arrive at a unified theory of publishing by building on four key terms: framing and models, filtering and amplification. Arguing that publishing can never be separate from content, he builds his model of the content machine. He connects his theory to the digital landscape, and looks to draw out broad implications for the general drift of publishing. He expands on the filtering function in two further works (Bhaskar, 2016 and 2019), employing what he regards as a better turn of phrase, curation. A publisher has to make choices as to what to publish, and this process of selection adds value.

More part of a European tradition, which regards with some suspicion the concentration on bestsellers in the Anglo-American model of consumer publishing, Roberto Calasso (2015) sees publishing as 'a kind of business that is also an art' (4) – and identifies the importance of form for a publisher, the creation of an identity. The art of publishing is the 'capacity to give form to a plurality of books as though they were the chapters of a single book' (9). Commenting on the packaging of British and American books, he sees the process concentrating on each individual book in turn without regard for the overall form of the publisher's list.

The operations of publishers have been described in works by industry insiders such as Anthony Blond (1971), Stanley Unwin (1976; original edition 1926) and Diana Athill (2000). More critical views are presented by André Schiffrin, deploring the growing conglomerate culture of book publishing (Schiffrin, 2000). Alison Baverstock and Susannah Bowen (2019) concentrate on the marketing function, moving from theory to practice. Lynette Owen (2020) explores the world of international rights; Frania Hall (2022) offers an introduction to the development of digital products; and Gill Davies (2004) presents the commissioning role. Adrian Bullock (2012) offers an overview of production and project management in the book industry.

The debate about the future of the book has been live since before the arrival of digital alternatives to printed texts (Eco, 1996; Price, 2019). The advent of TV saw a shift in reading habits (Phillips, 2010b) and then the industry (and the media) embarked on repeated convulsive episodes around the death of the book – for example with the arrival in turn of CD-Roms, ebooks and apps. Nicholas Carr bemoaned the influence of our digital browsing on our attention spans, saying that when he read a book his attention would wander after only a few pages (Carr, 2008). Yet there is continued expansion in the number of books published, both from publishing houses and self-published (Baverstock, 2011), to the point of saturation (as originally highlighted by Zaid, 2003). Print has shown great resilience in the face of digital developments and the form of the book remains largely unchanged with its variety of paratextual elements (Genette, 1997). Audiobooks, once dismissed as a lazy form of reading (Kozloff, 1995), offer an opportunity for publishers to gain a new, younger market. Rubery (2016) traces the history of the audiobook, now a fast-growing format within publishing.

## 2.2 PUBLICATIONS

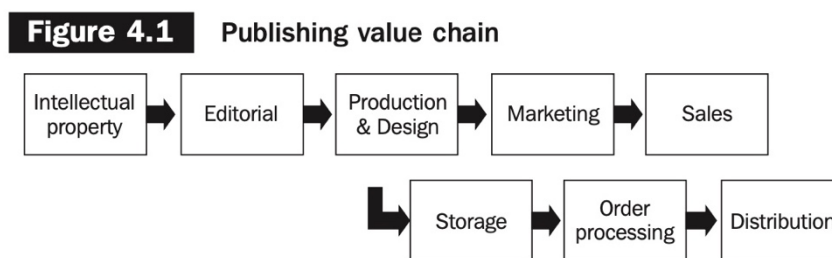
Each publication included in the appraisal is presented in turn, ordered by date of publication.

#1 Phillips, A. (2006a), 'Where is the Value in Publishing: The Internet and the publishing value chain', chapter in Cope, B. and Phillips, A. (ed.), *The Future of the Book in the Digital Age*, Chandos.

The volume in which this chapter appears was a collection of papers from the third International Conference on the Book, hosted by the Oxford International Centre for Publishing. I co-edited the volume, which asked what place the book has within a rich media environment of TV, the internet, gaming and mobile technology.

#1 presents a model of the industry and its functions, showing how the different areas add value. In 2004 I carried out a consultancy project in the Middle East, developing a strategic and financial model for a new publishing house. This offered the opportunity to reflect on the functions of a book publisher and the publishing value chain. In this book chapter I developed a model of the value chain in publishing – taking as my starting-point Porter’s concept of the value chain (Porter, 1985 and 2001).

The goal of a publisher’s activities is to generate a profit, by creating value that exceeds the cost of providing the product to the customer. The raw material in publishing is the author’s text, which is taken through a succession of stages before its sale to customers. By adding value to the text, through for example judicious editing and an attractive cover, publishers hope to sell more copies or charge a higher price. Publishing firms make decisions about which activities in the value chain to include in – or exclude – from their business. Publishers can choose which activities to undertake themselves, and which to outsource to third parties. Taking a part of the value chain in-house adds to the fixed costs of the company. This may enable higher profitability when sales are rising, but can lead to larger losses in poor economic conditions.



This book chapter fits into the overall theme of what publishers do, showing the key functions of a publishing house. An earlier published work focused on one element of the value chain, examining the relationship between the author and the editor. Noted was the author’s increasing desire for contact with other parts of the publishing house, and not just with their commissioning editor (Phillips et al., 2005).

#1 was reprinted in Weedon (2010). The model of the value chain was reproduced in #5 in the chapter on how publishers create value; the model was also cited in Bhaskar (2013). The book was reviewed in the *Library Journal*:

The structure of the papers published in this book is convincing as a tour d'horizon of issues on the minds of the many people – authors and publishers, printers and internet wonks, sociologists and book trade students and historians – who interest themselves in the past, present and future facts and destinies of the book. ... On a critical level, these issues are dealt with at three levels of sophistication. The highest (which is also the most perceptive and useful) comes in pieces on new revenue sources from on-demand (Phillips), the contributing editors' own introduction and late chapter where the overarching issues are summarized. (Hannabuss, 2007)

#2 Phillips, A. (2014), *Turning the Page: The evolution of the book*, Routledge.

Most book history concentrates on the printed book, its dissemination and reception, although there have been moves to update Darnton's Communications Circuit to take in digital developments (Darnton, 1982; Adams and Barker, 1993; Squires and Murray, 2013). The ecosystem of the digital book is drawn out in #2, which foregrounds the central questions of the critical appraisal, with analysis of the key drivers of authorship, copyright and readership. The book suggests publishers should develop digital capital, in addition to symbolic capital (Thompson, 2005 and 2012), through a closer relationship with readers of books.

This book does not attempt to cover the form and functions of the publishing industry, which are amply covered in #5. Instead the aim is to analyse the fundamental drivers of the book publishing industry, and to examine the effects of digital and other developments on the book itself. The perspective taken is from the field of publishing studies, and given its interdisciplinary nature, the book draws on theory and research from a range of subjects from business and sociology to neuroscience and psychology. Since other media have experienced digital transformations ahead of the book, the text also investigates developments in the areas of music and newspapers. In addition to drawing on my own observations of the book industry worldwide, I conducted a series of interviews with industry professionals, from authors to digital publishers.

Some large themes dominate the discussion of the evolution of the book, and how these play out form the backdrop to the analysis. They impact in significant ways on the key drivers of authorship, readership, and copyright examined in the first three chapters.

Firstly, disintermediation, with the arrival of digital production and distribution enabling the bypassing of traditional players in the value chain of publishing and the arrival of new ones. Do authors need publishers? Do readers need physical bookshops? Author can talk direct to reader, publisher direct to consumer, technology company direct to user.

Secondly globalization – with the arrival of ebooks, a reader the other side of the world does not have to wait for a book to be printed and distributed, or translated. They can download the book on first publication and have immediate access. This is a tremendous opportunity for books and knowledge to spread in new ways, across new networks. There is also analysis of diversity of book markets and the flows in translation; and the identification of the trend for readers in Europe to read in English.

Thirdly convergence, which takes many forms. This includes the presence of many types of media on the same mobile device, where the book has to compete directly with games, newspapers, the web, and social media. This brings opportunities but also considerable risk for the book's future.

Lastly discoverability – how do readers come to find books? An author can self-publish their work, a publisher can put their book on Amazon, a book app can be posted on iTunes – but how does anybody know it is there? Bookshops provide a browsing experience which it is difficult to find online: covers may attract a potential purchaser, the book can be handled and opened at random, and a new author may just find an audience (Phillips, 2007a and 2007b). The challenge is to replicate this in the digital world, and create communities around content which allow readers to explore new authors.

The issue for publishers is whether they are part of the communities which develop around content. They need to generate a new kind of capital – digital capital – which encompasses an interaction with consumers, who participate in a conversation and a community, facilitated by digital tools, around authorship, readership, and the co-creation of value. Already successful authors, who have a strong brand and relationship with their readers, may possess considerable digital capital – they have readers following them on their website, blog, and social media. This puts them in the position to negotiate better terms with publishers, partner in new ways, or go direct to their readers.



FIGURE 4.4 Digital capital

In the chapter on slow books, a closer look is taken at reading on screen and in print. Reading books on-screen is now a pleasant experience or perfectly functional depending on the device used. The evidence so far is that e-readers are most suited to straightforward linear reading of commercial fiction, and this is the way the market has moved. With the printed book, we are conscious of its length, how far through the text we have reached, and can visualize where in a novel a character first appeared. If books in digital form enable us to read faster, this may not necessarily be a good thing. To relax or to engage in deep thought is not encouraged by rushing through at speed. Just as we have a movement for slow food – in reaction to fast food – we should be advocating slow books – taken at a leisurely pace in whatever format.

The monograph answers key questions about the digital book and how the book is evolving. The book argues the case for evolution not revolution, and identifies the *vanilla ebook*, the form of the digital book which most closely matches the physical book (this concept was cited by Thompson, 2021). The importance of the co-creation of value can be seen today with the development of stories derived from the genres and tropes that are successful within BookTok. The chapter on the global book from #2 was reprinted in Davis (2019), a collection of seminal essays on print culture, and was regarded as grappling with ‘the way that geographical boundaries are challenged by digital communications technology and publishing’. The complete work of #2 has been translated into Chinese.

The following are endorsements on the cover of the book. Adriaan van der Weel: ‘As a key industry expert, Phillips can be trusted to present us with a level-headed assessment of the radical transformations the book trade is currently experiencing.’ Michael Bhaskar: ‘essential reading for anyone interested in how books are changing. Covering all the key topics in a clear and comprehensive fashion, Phillips raises vital questions about authorship, copyright and the very form of the book itself. With a wide and judicious set of examples, there is no better place to learn about the emerging ecosystem of the digital book.’



Alison Baverstock wrote:

It is one of the ongoing ironies of the book business that while each year it surpasses the amount of content produced in previous years, its output reflects so little on itself. Angus Phillips' new book redresses the balance, and will be enjoyed by a wide range of people – from publishers (actual and potential) to keen readers. His broad frame of reference is particularly welcome; accessing research from a wide variety of disciplines and mixing this with both reflection on his own experiences and those of a wide range of industry professionals and other stakeholders. Consistently illuminating, enlightening and fascinating, this important book offers the tempting prospect of time well spent.

#3 Phillips, A. (2017a), 'The Closure of the Printing House', chapter in Robbins, K. (ed.), *The History of Oxford University Press*, OUP.

I contributed two chapters to this volume, the second taking the topic of trade publishing at OUP (Phillips, 2017b). The first (#3) examines the background to the closure of the Printing House at Oxford University Press in 1989, and is distinctive for its coverage of the economic, political and technological context. The background was the challenges faced by manufacturing generally in the UK (e.g. the high value of the pound), the government's willingness to challenge the power of the trade unions, and the arrival of desktop publishing. The closure was a significant development and attracted coverage in the national press; it was also devastating news for its loyal and highly skilled workforce.



FIGURE 5.18 *Printing World* on the closure of the Printing House, February 1989

The Printing House was defeated by a combination of factors, from technological to economic, and its management did not respond quickly enough to change. The printing companies which survived the 1980s had to develop an effective strategy, update working practices, and raise levels of productivity to compete effectively on price and service. The overall backdrop was an economy in which the manufacturing sector shrank considerably in the 1980s (Evans, 2004).

The chapter reveals that the Press did not need its own printing operation on any significant scale given the range of cheaper options available; and hot metal typesetting had been overtaken by computerization. The Printing House could offer a premium service but this was no longer required for the majority of print jobs, and given the diversity of OUP's publishing, they could not carry all the equipment necessary to match those operations. There are many stories about the talents of the staff, for example the reader who knew 26 languages or the compositor who did not know Urdu but realized there was a mistake in the copy for a book when he had to make an unusual hand movement when setting a page using metal type. Yet most books did not require highly skilled craftsmen or knowledge of a range of languages. Despite the reduction in its size over a number of years, the Printing House could not find a profitable niche in a changed world.

This chapter fits into the overall theme of what do publishers do, and demonstrates that printing is not a core function. Publishers place work at a range of third party suppliers, and choose the right supplier for particular books or types of books.

John Feather in *Library and Information History* described the final volume of the OUP history as 'a worthy successor to its predecessors and completes a more than worthy monument to a great institution'. (Feather, 2017)

#4 Phillips, A. (2017c), 'Have We Passed Peak Book? The uncoupling of book sales from economic growth', *Publishing Research Quarterly*, 33:3.

This journal paper uses data supplied by Nielsen Bookscan and the UK Publishers Association to examine long-term trends in the UK publishing industry. Time series data on book sales are analysed to establish what correlation if any exists between the national income of a country and its sales of books.

The first period, from 1985 to 1999, shows a striking relationship between total sales and GDP (a correlation coefficient of 0.968); and the unit sales graph also shows a similar pattern. As the economy grew and living standards rose (excepting the recession of 1990 to 1992), both value and volume sales followed a similar upwards trajectory. In the last twenty years of the twentieth century the UK saw a revolution in bookselling with the growth of chains such as Waterstones and Borders, and the development of superstores on the model found in the USA (Thompson, 2012). Towards the end of this period, the market lost fixed prices for books; the Net Book Agreement (NBA) fell into disuse in the mid-1990s, formally ending in 1997.

In the second period covered in the paper, from 2001 to 2015, the link between sales and GDP appears to disappear when we examine invoiced sales from publishers, even before the impact of the 2008 crisis. This is also taking account of the growth of digital sales towards the end of the period. The direct consumer data shows sales tracking GDP until the onset of the financial crisis; thereafter the only trade sector to have kept pace with GDP is children's, and this contrasts with the areas of adult fiction and non-fiction.

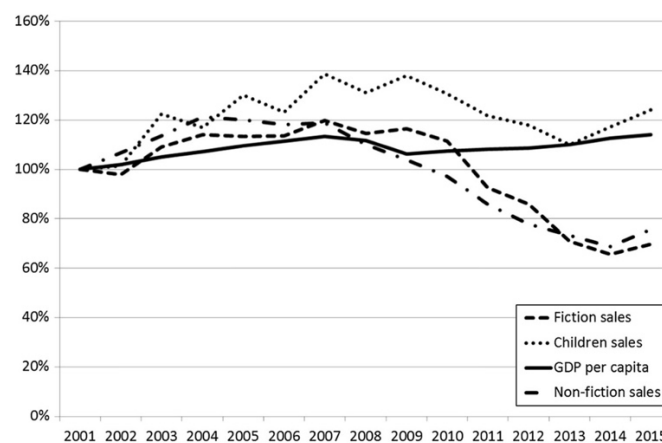


Fig. 8 Consumer sales by value 2001–2015 (%)

Possible reasons for the ending of the linkage with GDP are advanced in the paper. These include changes in the retail landscape – books lost visibility on the high street as retail space disappeared, and sales moved online. Also the 2008 recession was different to many previous downturns: the rise in unemployment was not as marked as might have been feared, but there was an impact over a long period on real earnings.

This article gives a methodology for the analysis of book statistics, and presents a longitudinal study of the book industry in the UK, key for understanding how the book is evolving. For example, the arrival of the book in digital

form is tracked in the study. Separately I published with European colleagues a paper on the need for more accurate book statistics, arguing the need for the same methodology to be used across countries (Kovač et al., 2017). This paper led to an invitation to join a seminar at the World Intellectual Property Organization in Geneva on book statistics in 2019, in association with the International Publishers Association; I was able to present my methodology and long-term analysis of sales in the UK. The analysis in #4 was cited by Sarah Brouillette in a chapter on post-war literary fiction (Brouillette, 2022).

#5 Clark, G. and Phillips, A. (2019), *Inside Book Publishing*, 6<sup>th</sup> edition, Routledge.

The structure of the book is based on the value chain from #1 and the model is reproduced in the book. The book provides detailed analysis of the main aspects of the publishing process: commissioning authors, product development, design and production, marketing, sales and distribution. There is coverage of all sectors of the industry, from commercial fiction and non-fiction to educational publishing and academic journals. The text reveals how publishers continue to adapt to a fast-changing and highly interconnected world, in which printed books have proved resilient alongside ebooks and the growth of audio. Major themes are explored, including the development of digital products and the use of social media in book marketing, as well as those that affect publishers' businesses, such as the rise of internet retailing; rental models for student textbooks; and open access, where academic content is free to the user. Case studies from industry experts give perspectives on topics such as crowdfunding, self-publishing and how authors can market themselves.

The work explores the industry dynamics, from consumer to academic publishing, highlighting the continued growth in globalization, the strategic concentration in ownership, and the move from product to service in many sectors.

Continuing the theme (in #1) of how publishers add value, there is close analysis of how publishers add value to the work of an author. By lending its brand or imprint, the publisher is making a statement about the value of an author's work – it is worth publication by an investor, i.e. the publisher. The publisher invests its staff resources and technological infrastructure to produce, market and sell the book on the author's behalf. A creative expertise of the publisher is to design and present the author's work to best effect in a saleable printed book: length, size, format, usability, fitness for purpose, quality and accuracy of content, design and production values, and the cover to sell it. The publisher orchestrates the production of the book or journal through the procurement and management of a range of external services from individuals – freelance editors, designers – and companies – typesetters, printers, paper suppliers, technology companies. The realization of connecting a

readership to a book and consequent sales depends largely on the effectiveness of the publisher to promote the work in a variety of formats, to maximize discoverability through search engine optimization (SEO), and to sell it and distribute it through the channels to market. Reaching the high street trade is difficult for self-published authors and a key selling-point of mainstream publishers. The publisher's responsibility and expertise are to exploit the rights granted to the fullest in print and electronic forms (and when available to license others to do so), and to protect the author's rights against infringement by others using technical and legal means. Ultimately a publisher has to operate a profitable business model that delivers sufficient return to enable the publication of authors' works, and offers to their authors remuneration in terms of readership, money and status.



Publishing lists have their own identity and even within the larger groups there has been a conscious decision to keep separate imprints, each with their own distinctive flavour and editorial strategy. The small publisher feel is attractive to authors, and imprints assist the trade to make sense of the large number of new and existing titles. Lists may be built around fiction genres and authors, subjects, brands, or design character. A set of titles that presents a defined genre or subject to a specific audience will have a greater value than one which simply aggregates disparate titles. Successful lists attract both authors and readers (Calasso, 2015), and marketing a whole list is more cost-effective with cross-marketing opportunities between titles.

I joined as co-author for the fourth edition of this book, published in 2008. We have recently signed the contract for the seventh edition, to appear in 2024. The book is used as a key text on publishing studies programmes not

only in the UK but internationally. The book has been translated into Chinese, Korean, Croatian, Romanian and Lithuanian.

The book fits into the overall theme of the enquiry, as to what publishers do. Samantha Rayner of University College London in a review for *BookBrunch* wrote: 'In short, this volume merits the accolade of being "essential": anyone who wants to get a good grip on the way publishing works should read it.' (Rayner, 2015) The Publishing Training Centre describes it as 'The definitive text for all who need to learn about the publishing industry.' It has been used as a manual by professional publishers such as Stefan Tobler, the founder of And Other Stories: 'This book was invaluable to me when I set up And Other Stories without having worked for any publishing company. To understand the industry, this is your book.' The press And Other Stories was first set up in Tobler's living-room; and by 2020 it announced its expansion in the US market with new titles being published both sides of the Atlantic.

#6 Phillips, A. (2019), 'Corporate Social Responsibility', chapter in Phillips, A. and Bhaskar, M., *The Oxford Handbook of Publishing*.

I am the co-editor (with Michael Bhaskar) of the Oxford Handbook, described by the publisher as marking 'the coming of age of scholarship in publishing studies'. The book is a summation of the present scholarship around the book industry in an edited volume with a high profile list of international contributors.

I contributed individual chapters on the future of publishing and corporate social responsibility. The former presents scenarios for the future of publishing and takes in the role of AI and how books may be written and translated using machine technology. The Introduction to the volume also tackles themes around the place of the book and the overall information environment. #6 examines the area of corporate social responsibility (CSR) and aims to clarify the role of the publisher in an age of open content, social media and self-publishing. The conclusion of the chapter is that an essential part of being a publisher is to take responsibility for content – compared to the view of some tech players in social media, who simply regard themselves as a channel for the content of third parties.

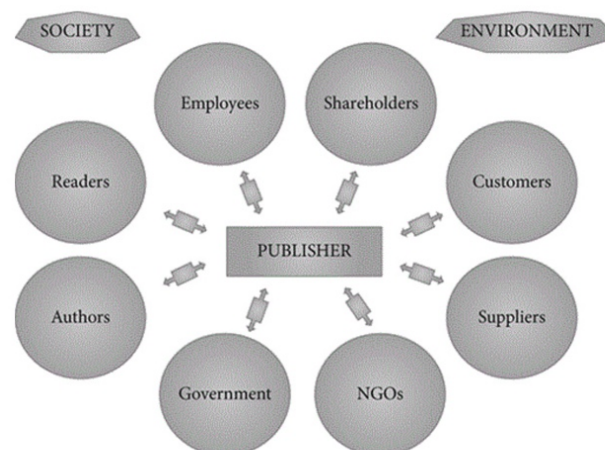
From Carroll (1979) #6 takes as its starting-point that the social responsibility of businesses covers economic, legal, ethical and discretionary expectations. The chapter makes the assumption that publishing firms make a positive contribution to the economy and abide by the laws of their country (for example around employment

law and health and safety), and concentrates on the two areas of ethical and discretionary expectations. The expectations of the general population and the relevant stakeholders of a publishing firm should inform how that company operates so that it acts as a good corporate citizen. There are vital issues affecting our planet including climate change, inequality, and political freedom, and publishers have produced many books and articles on these topics. Companies are not obliged to consider the externalities, or side-effects, of their operations, but most now recognize they cannot be ignored (Meyer and Kirby, 2010).

In a world of alternative facts, claims and counter claims, many believe we are losing our grasp on what is the truth. At the same time publishers feel they have to justify their existence alongside the growth of self-publishing and user-generated content. The expectation from readers is that content should be credible, and this surely highlights key value that publishers should bring to their content. Investment in selection, quality control and editing is not wasted and must be highlighted to readers and consumers. Taking responsibility for content is a key element of what publishers do – why they are necessary.

Operating as an ethical business, a publisher should take into account the expectations of its stakeholders to ensure that social and environmental concerns inform its activities. A map was created showing a range of stakeholders from authors and readers to society and the environment. Actions to be taken by publishers extend from the use of energy from renewable sources and a responsible attitude to authors and key suppliers, through to hiring and employment policies and salary structures. As publishers have outsourced more of their operations, and use third party suppliers on a regular basis, they have to monitor working conditions at printers, source paper in a sustainable way, and examine all aspects of the supply chain.

**Figure 10.1**



Map of the stakeholders of a publisher

Separately I wrote a piece on the carbon footprint of a print book as compared to a digital book (Phillips, 2021). This expanded on the work carried out in this area for #6. The Handbook has been reviewed favourably: Corinna Norrick-Rühl in *SHARP News* said, 'The near-impossible effort to summarize the state of publishing in an almost 500-page handbook was successful, and it is certain that this volume will find many readers across disciplines such as literary studies, book studies and media studies over the coming years.' The Handbook has been sold into four languages for translation: Spanish, Chinese, Korean and Japanese.

#7 Phillips, A. (2020a), 'Does the Book Have a Future', chapter in Eliot, S. and Rose, J. (ed.), *A Companion to the History of the Book*, Wiley Blackwell.

I contributed to the original edition of this book, published in 2007, and I updated the chapter for the revised edition. A theme of the chapter is how the printed book has shown resilience in the face of competition from other media and digital versions of the book. For readers, print holds out the prospect of disappearing into another world, away from screens, into a rich landscape of discovery and imagination. For an author, appearing in print remains preferable to being published on the web. There is an affirmation of one's worth as a writer, and receiving a beautifully printed edition of your work is an undeniable pleasure.

The printed book remains for some a status item, to be displayed prominently at home or carried around in public. The success of book clubs or reading groups reveals reading to be a social activity: we like to read, share, and discuss. The distinction can be drawn between 'lean forward' technologies like the internet, which are becoming the primary means to access information for work and education, and the 'lean back' technology of the book, still important for enjoyment and relaxation (Adams 2001).

Print remains important because there is a continuing demand from consumers, and it offers a model of publishing that publishers understand and know how to make work. They are comfortable with the physical book: the sale of a physical item yields a return against a predictable cost. A digital product can be highly creative, but since there are no set boundaries, there are uncertainties over the costs involved and profitability is more difficult to control. What is striking is the success of the ebook in vanilla form (see #2), while enhanced ebooks and apps have had mixed success in the market and have often lost money for publishing houses.

The future of the book has been a long-standing question within publishing studies, and this chapter is part of the author's enquiry into the evolution of the book. #7 appeared as the final chapter of the multi-contributor



volume, and a reviewer commented on the first edition that the coda is ‘a wonderfully self-reflexive ending, commenting as much on the very book that it concludes as to its response to the question it poses.’ (Treharne, 2009) A version of the chapter appeared in translation in a library journal in Latvia (Phillips, 2009).

#8 Phillips, A. (2020b), ‘The Modern Literary Agent’, chapter in Baverstock, A., Bradford, R. and Gonzalez, M. (ed.), *Contemporary Publishing and the Culture of Books*, Routledge.

This book chapter examines the role of the literary agent in the publishing industry: the coverage includes the area of audiobooks and questions around the diversity of the gatekeepers in the industry. Research for the chapter included interviews with industry professionals. The chapter shows an area of book publishing where activities have been outsourced from editorial departments.

The literary agent is prominent in trade book publishing in the UK and the US (Thompson, 2012), whilst the role is rarer in other publishing markets, such as in continental Europe. The agent acts as a gatekeeper within the industry, especially in the area of fiction, and carries out initial filtering for the publisher (Bhaskar, 2013). It is hard to get in the front door and secure an agent’s services but once an author has an agent, their chances of securing a publishing deal are significantly enhanced.

What started as an intermediary between the author and publisher has developed into a much broader function, acting on behalf of the author, with elements of business, editorial and marketing. Literary agents champion authors, offer them invaluable support and advice, and may be the single point of continuity throughout their writing career. The piece concludes that much editorial work has been outsourced from publishers to the office of the agent, reducing the overheads of publishing houses.

Diversity and inclusion is a prominent issue in today’s publishing and how authors are discovered is of key importance. As literary agencies have such a prominent gatekeeping role, they must consider the nature of their workforce as well as how new talent is discovered. Their location is one issue and there are considerable challenges in basing an agency outside London and the South of England (Ramdarshan Bold, 2013). A case study in this chapter is the Good Literary Agency. In 2018 this new UK literary agency opened its doors to non-agented writers with a focus on ‘discovering, developing and launching the careers of writers of colour, disability, working class, LGBTQ+ and anyone who feels their story is not being told in the mainstream’.

#8 was praised in a review by Kenna MacTavish as providing ‘a sharp and up-to-date overview of the agent’s role in an increasingly challenging media environment’ (2020, 661).

#9 Phillips, A. and Kovač, Miha (2022a), *Is this a Book?*, Cambridge University Press.

This book follows on from two previous papers written with European colleagues (Kovač et al., 2017 and 2019), which examine the nature of the book and its definition. The first paper outlines the measurable properties of book production and consumption. It analyses the reasons why such statistics are necessary; and proposed the measurement tools that would make the current ecosystem of book reading and publishing more transparent and comprehensible. The second paper is a natural extension of the first: looking at the gaps in contemporary book publishing and reading statistics revealed that more new formats and forms of what we call the book had emerged in the previous two decades than in the preceding century. From this arose the need for a new definition of the book. How can book statistics be produced without clearly defining the main object of measurement? The situation is complicated by the publication of books without an ISBN – this is not required on Amazon, for example – and the proliferation of formats including print, ebook, and audio.

The volume examines the technical definition of a book and goes further to develop a model of how the book operates in contrast to other media such as journals and magazines. The nature of the book has changed considerably with the commercial success of ebooks and now audiobooks. Particular attention in the volume is given to audiobooks and how they fit into the model of how we define a book – given that audio involves listening not reading. Rubery suggests that an audiobook is defined as being based on ‘a book originally published in print’ (2016, 3) and #9 makes the further step in calling this the *vanilla audiobook*, thus allowing for audio first titles.

A possible solution to a technical definition of the book would be to consider the printed book as the core of a cluster of derivatives. These derivatives could be considered books as long as their content is organized along the principles of books. Here the concept of book information architecture provides a way forward. The idea that the book is an information architecture – not a product or thing – was put forward by Cope and Phillips (2006), who identified the main elements of the book’s information architecture: title, cover, title page, author, linear structure supported by page numbers, chapters, etc., and body text sometimes supported by images. Later both long-form and immersive/deep reading were added to the definition of the book alongside the elements of the book’s information architecture (Kovač et al., 2019).

#9 proposes a model of the book akin to the Three Body Problem in physics, where the bodies are in a constant state of flux. Such a tripartite model for the book operates across its information architecture, its position as a carrier for the communication of knowledge and information (following the Order of the Book identified by van der Weel, 2011), and a distinct business model. The vanilla versions of the ebook and audiobook operate within the same information architecture as the print volume, and often within the same copy sale business model. The focus on the business model of the book allows us to separate out books from products such as magazines and academic journals, and to conclude that fiction online is not a book. Similarly audio first productions and podcasts are not books, operating with a different information architecture, although they may migrate to publication in book form.

The motion of the three elements that form the book became especially dynamic in the last three decades. The internet has encouraged experimentation around the form of the book, aiming to move it away from a linear structure. Yet the book gave up the opportunity to become that one, great hyperlinked resource envisioned by Kevin Kelly (2006), and web content is different in terms of information architecture and business model. The book remains a long-form, linear narrative with set boundaries.

If non-linear forms of text can so easily match what the book format accomplishes, such as in the transmission of knowledge and culture, the book as we know it would exist only in museums. The resilience and continued appeal of print books can be explained if we consider books not as an adversary to screens or as a relic of history, but as a long-form, linear reading complement to digital reading and browsing (Baron, 2015 and 2021). A reason for the success of the vanilla ebook and dedicated reading devices is perhaps that most book readers prefer to follow linear narratives and do not wish to be distracted by hyperlinks to outside the book.

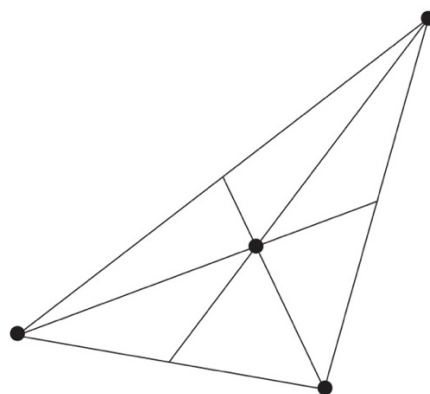


Figure 3 The three-body model

Note: an animated version of the figure is available in the online resources ([www.cambridge.org/isthisabook](http://www.cambridge.org/isthisabook)).

Source: Dntllthmmnm, CC BY-SA 4.0, via Wikimedia Commons

The monograph answers key questions about the digital book and how the book is evolving. The book forms part of the enquiry into how the book is evolving, with its up-to-date analysis of areas such as the audiobook. #9 is being translated into Croatian, Slovene and Spanish. An article based on the book has been published in *World Literature Today* (Phillips and Kovač, 2023); and a panel discussing the questions raised by the book is planned at the 2023 Frankfurt Book Fair.

In an endorsement of the book, Michael Bhaskar said of #9:

The 21st century has been a time of huge change for the book, but it has left us with more questions than answers. However in this thought-provoking and informative monograph, Phillips and Kovač uncover what makes the book tick, both today but also over the deep expanse of reading history. They uncover the big questions around the book, whilst offering original answers to what, in an age of transformation, is so significant about this slippery but essential form. Is this a book? is the best single volume on the book there is.

Adam Hodgkin, Chair of the publisher Exact Editions, wrote that the authors:

posit three essential features of the book culture that we have inherited and largely preserved: its information architecture, the role of books in the transmission and generation of knowledge (they use a phrase 'The Order of the Book') and its business model. All of these aspects of the book are with us and show signs of continuity and are also under challenge. But the situation is dynamic and they emphasize that the value of long-form reading needs to be reinforced and celebrated. (Hodgkin, 2023)

### 2.3 THE COHERENCE OF THE PUBLISHED WORK

The writing of this critical appraisal provides the opportunity to reflect on publications from a period of 17 years. The overarching themes are:

- What do book publishers do?
- How is the book evolving?

#1 sets out the value chain in book publishing and establishes the theme of how publishers add value, and what activities are seen as central to the work of the publishing house. These activities are explored in detail in #5, which also contains a separate chapter on how publishers create value. Ultimately a publisher has to operate a profitable business model that delivers sufficient return to enable the publication of authors' works, and offers to their authors remuneration in terms of readership, money and status.

#3 and #8 examine the areas of printing and the work of the literary agent, showing activities that are now outsourced by publishers – typesetting and printing, and the filtering in trade publishing of potential publishing projects. The study in #3 is a substantial case study of the closure of the Printing House at OUP, defeated by both a lack of a coherent strategy and a combination of economic and technological factors, such as the high value of the pound and the arrival of desktop publishing. As well as their filtering role, agents also carry out some detailed editorial work, both at proposal stage and working with the author on the final manuscript. As literary agencies have a prominent gatekeeping role in mainstream publishing, it is important that they consider the nature of their workforce and how new authorial talent is discovered.

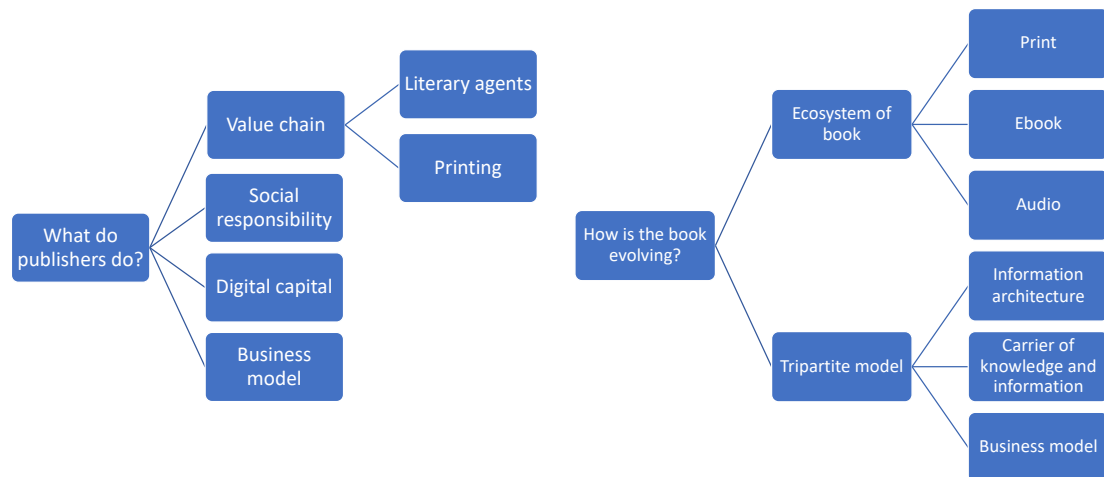
The work in #1 was prompted by the growth of digital publishing and the need to reflect on what publishers do to create value – e.g. by comparison with the arrival of free content on the internet. Competition today also comes from self-publishing, social media and other media. In #2 the ecosystem of the book is examined, and key themes include globalization, the democratization of authorship, and the need for publishers to make direct connection with readers – and create digital capital. This concept encompasses an interaction with consumers, who participate in a conversation and a community, facilitated by digital tools, around authorship, readership, and the co-creation of value. In #6 the role of the publisher in an age of social media is examined, alongside the responsibilities of the organization to operate in an ethical manner.

#7 appraises the future of the book in the light of digital developments and competition from other media. The arrival of the global pandemic revitalized book sales but previous to this period, the industry seemed to have reached maturity. The long-term development of the UK industry is considered in #4, which observed that the link between sales and GDP growth appeared to have been severed at the time of the financial crisis of 2008. The growth of sales of the book in digital form are tracked, alongside the success of children's books.

By concentrating on what is a book?, a key topic in contemporary publishing, the analysis of #9 draws from previous work on a technical definition whilst offering a new model of the book as part of a dynamic system. The three parts of the analysis are the book as an information architecture, a carrier of knowledge and

information, and with a specific business model. Using this tripartite model, we can delineate the book from other media objects including the podcast and the blog.

The figure below draws together the key threads from the publications within the two overall research questions.



## 3 METHODS

The programme of research has covered both the publishing industry and the nature of the book. The enquiry has been informed by my work in the industry as a publishing professional and later as a trainer and consultant. The range of primary research includes semi-structured interviews, case studies and archival research and these areas will be explored in detail in this chapter. I have also had access to industry data on sales trends, demographics and consumer behaviour.

Research was undertaken mostly in the UK but some interviews were carried out with professionals in other publishing markets. Discussions with both academics and industry professionals have helped to form my ideas regarding the dynamics of the publishing industry. I was a member of E-READ, a European research network (COST Action) bringing together more than 120 scientists and scholars from 33 countries and from different research fields focusing on reading with a special emphasis on differences between paper and screen reading (<https://ereadcost.eu>). At Oxford Brookes I am currently a member of the advisory group for the university's Open Research Project. I have visited and spoken at a range of industry events such as international book fairs and conferences in Europe, the Middle East, Central America, and Asia. My work is distinctive in its international outlook and an understanding of how industry dynamics may differ from one publishing market to another. The discipline of publishing studies has an industry focus whilst retaining the perspective that books are of cultural importance and not simply commercial objects; it is firmly rooted in the marriage between culture and commerce, between practice and theory/interpretation.

The publications were not planned or written to be part of a doctoral submission, hence there is variety in form and approach (Peacock, 2017).

### 3.1 RESEARCH PHILOSOPHY

No specific philosophy was adopted but I would say broadly that my approach falls under interpretivism. I would certainly contrast it to positivism and a quantitative approach. I largely focus on qualitative research and my interpretation of the data is a key part of the findings. I do, however, triangulate where possible by, for example, using industry data and reports to confirm key trends.

### 3.2 DESK RESEARCH

I have drawn upon desk research involving journal and book sources from publishing studies and allied disciplines. Through the University library I had access to a range of content including industry and journal databases; newspaper and magazine sources including the trade press; and the excellent book collection in the area of publishing studies.

The databases used include Academic Search Complete, Business Source Complete, Communication & Mass Media Complete, Mintel, and Nielsen Bookscan. I searched Google Scholar in a systematic manner. *The Bookseller* was searched using both print copies and bookseller.com. The relevant journals include *Logos*, *Publishing Research Quarterly*, and the *Journal of Scholarly Publishing*, all searchable online. Search terms varied but, for example, ‘future of the book’ was employed when researching #9. This revealed both book and journal sources and ensured that I took an international perspective.

The desk research informed literature reviews for the publications to ensure that I viewed research beyond the familiar authors in publishing studies. Viewing the reference lists of articles suggested further works of relevance (cascade search). Works #2 and #9 include research on reading from neuroscience and psychology.

### 3.3 INTERVIEWS

Qualitative research in the form of semi-structured interviews with industry professionals was an important part of the studies in #2, #3, #6 and #8. In advance of the interviews, the aims of my research were sent to the interviewee. The interviews were not conducted under conditions of anonymity and any direct quotations used were checked back with the interviewees; ‘in some cases interviewees, who have spent their time and provided valuable information to the researcher, might wish ... to be credited’ (Brinkmann and Kvale, 2015, 95). The interviews were recorded using a digital recorder from which digital files were downloaded. The interviews and their transcripts are held securely on a hard drive; for #3 the recordings are now part of the archives of Oxford University Press and the consent form included agreement to the recording being placed in the archive. A few interviews are publicly available through the podcast series run by the Oxford International Centre for Publishing (featured in *The Bookseller* trade magazine, 12 November 2021). I took some informal notes in handwriting during the course of the interviews. My own experience and knowledge of the publishing industry informed the interviews as I was able readily to comprehend the issues and replies; Brinkmann and Kvale (2015) suggest a high level of skill is required on behalf of the interviewer, who ‘needs to be knowledgeable about the interview



topic' (19). Thompson (2012) reflects that 'your questions as an interviewer get better as you understand more about how an industry and the organizations within it work' (416).

For #2 I conducted 13 interviews with industry experts and professionals. To gain an international perspective I interviewed experts from the UK, USA, Austria, Slovenia, Brazil, Japan and China. All those approached agreed to be interviewed. The conditions for the interviews ranged from a Skype call or telephone contact to being in the offices of the publisher Penguin in Beijing. The interviews captured the different paths of the digital book in international markets, confirming the trade statistics that showed rapid growth in first the USA followed by the UK, with European and other markets much slower to adopt the book in digital form. I also interviewed a leading figure in the emerging field of literary neuroscience, whose interdisciplinary experiments use neuroscientific tools to explore the cognitive dynamics of reading. This interview informed the chapter on reading. I received funding from Santander to pay for a research trip to China, where I was able to explore through interviews the digital book, from texts on mobile phones to the stories appearing on literature websites.

For #3 I started by listening to the interviews carried out by the principal investigators of the history project, and then carried out my own investigation through further interviews. This approach proved fruitful in solving an apparent mystery around the closure of the Printing House in 1989 very soon after a fresh investment in new machinery (in 1987). My interview (in October 2011) with the Secretary of OUP (equivalent to managing director) at the time of closure, revealed the hope that this fresh investment would make the printing works more attractive to a potential buyer. A revelation from an interview with a Production Director included the mechanism as to how to circumvent union control by the National Graphical Association (NGA). There was the use of sympathetic UK suppliers, who would provide an NGA stamp on work sourced from overseas suppliers, such as typesetting from India.

For #6 interviews were carried out with two industry experts in the area of sustainability, providing key technical knowledge about present standards of sustainable production. This allowed me to capture how the industry sources paper and printing sustainably and views the future of book production. For #8 I interviewed three literary agents and this informed my analysis of their gatekeeping role in the industry and of current issues such as diversity and the growth of audiobooks. The chapter identified the agent as taking on the new role of literary manager, representing the author's interests in whatever media format works for the material. This is encouraging the development of larger agencies, working across books, audio, film and TV.

### 3.4 CASE STUDIES

This approach is common within book history and is also used within publishing studies. The aim is to investigate a phenomenon within its real world context (Yin, 2018). I believe that my knowledge of the publishing industry is vital to this approach, derived from my continued involvement in the industry and participation in consultancy and training work. My books contain a variety of case studies, of books and publishing projects, from which are drawn wider points about the industry and digital publishing.

For #5 industry experts were approached to write short case study material to highlight key themes and topics from their perspective as industry professionals. All those approached agreed to contribute content, and the areas chosen for the latest edition include crowdfunding, authorship, the production of audiobooks, and social media. In chapter 5, on creating and protecting value, there is a case study of the accounts of Bloomsbury Publishing. As pointed out by a peer reviewer of #5, chapter 13 is a substantial case study of the channels to market in the UK. Publishers use a variety of sales channels, and the choice of channel will depend on the sector in which they operate. The sales success of consumer books, for example, may depend on retail exposure and an important purchase prompt is the book being visible in the shops.

#3 forms a substantial case study alongside my companion chapter in the OUP history on trade publishing; the research aim was to track the final years of the Printing House and reveal the reasons for its closure. The study moved beyond the strategy of the business to analyse the broader environment in which the Printing House operated. Interviews were carried out with former employees of the Printing House and the publishing operations. Alongside my research in the OUP archives (section 3.6), I examined first-hand accounts such as in Michael Belson's book, *On the Press* (2003) as well as contemporary reports in the national press. I sourced quotations, for example, from correspondence in *The Times* and lines from a poem by Roger Woddis in the *Listener* magazine.

In #8 there is the case study of the Good Literary Agency. The agency received a substantial grant from the Arts Council to work with writers from diverse backgrounds, and its choice as a case study gives a focus on the role of agents in broadening the talent pool of the industry. As part of the enquiry I interviewed a co-founder of the social enterprise literary agency, which is dedicated to increasing opportunities for representation for all writers under-represented in mainstream publishing.

There is a separate chapter in #9 taking as a case study the area of the audiobook. This was chosen for special emphasis given the vibrant growth in sales in many countries. The definition of an audiobook as based on a printed book has dissolved with audio-first projects, therefore this form of the book provides a fruitful area of analysis. Audio is attracting new audiences and new projects are commissioned directly for this format, some moving beyond the single narrator with more theatrical performances.

### 3.5 DATA ANALYSIS

As mentioned above, industry data were drawn upon in order to triangulate primary data. For many of the publications I drew upon data sources such as Nielsen BookScan, Mintel, reports from the UK Publishers Association (PA); and other industry reports such as from Edison Research and Pew Research. Also consulted were the annual reports and accounts of public companies. For #6 I drew on industry data to calculate comparative figures for the carbon footprint of the print book and ebook. In order to trace the growth of literary agents in the UK for #8, I went through editions of the *Writers and Artists' Yearbook* back to 1930.

When examining the growth of the publishing industry for #4, I used industry data and GDP figures for the UK. There are certain provisos around the data. The PA changed its methodology at the turn of the millennium so it was impossible to connect the two time series from before and after this point. The earlier series used and continued a dataset based on the Business Monitor statistics published by the Central Statistical Office until 1992; this was then updated annually by applying percentage changes derived from an annual survey of PA members. This had its problems due to an inconsistent response to the annual survey: the response rate varied and, for example, reached 51 per cent in 1995 but only 30 per cent in 1998. In 2000 the PA replaced its annual survey of members with a new system of data collection, collecting data from distributors and large publishers on a monthly or quarterly basis. The figures used were for total UK sales across market sectors, and the first substantial impact of digital is only recorded from around 2012. The PA data is accurate including digital from 2013; an estimating function was used to give a figure for digital sales in the years 2008 to 2012.

The Nielsen Bookscan series does not include data on ebook sales and only covers the print market. The decision was made not to include self-published titles since there was no firm data available and the likely impact on the sales totals from this omission was low. It is estimated that self-published titles took up 22 per cent by volume of the ebook market in 2015 - 16 per cent in 2014 - mainly in fiction, but often the books were sold at very low prices. In value terms the addition of such sales would have little impact on the analysis of consumer sales in the paper – the figure might total between £10 and £20 million against total sales of £1.89 billion.

For national income figures the study took the real GDP figures for the UK as represented at 2015 prices. For the industry data I also used figures represented at 2015 prices. This approach offered a fresh look at sales in the industry, which are presented in value terms but not at constant prices.

The data tables created for the article were published with the paper.

### 3.6 ARCHIVAL RESEARCH

This was a notable feature of #3, where I spent time in the archives of Oxford University Press to read original documents and correspondence including memos and letters. The Archive at Oxford University Press holds the records of the university's printing and publishing activities from the seventeenth century to the present. None of the material was digitized so I spent time at the OUP archive, requesting relevant materials from the Archives Team. As suggested by Yin (2016) I spent some time gauging the scope of the documents available in order to refine the best approach. The documents arrived in boxes categorized by subject area and I learnt how to navigate the system and, for example, request the relevant senior management papers for key dates and periods. I made extensive notes but also photocopied the most relevant documents, marking the copies with cataloguing details. The customary rules for the archives are that unpublished material is closed to outside researchers for a period of 30 years, but for research for the final volume of the history of OUP, researchers were allowed to access material up until 2004 (the final volume covered the period 1970 to 2004). All archival researchers are required to sign a research form before being allowed access to items in the collection. Minutes of relevant committees were available as well as correspondence concerning sensitive areas such as the final closure of the Printing House. I used a standardized system for referencing documents in the chapter.

I was also able to access financial statements and the original ledgers of the Printing House, e.g. detailing the print run by title. From the latter I was able to show the desperation of the works towards the end of its life, as it took on a variety of print jobs with no discernible strategy for the business. I also accessed staff magazines and correspondence received by senior managers (mostly anonymous) from employees frustrated by both lack of investment and the obvious decline of the Printing House. I supplemented reading documents with my own interviews with relevant professionals from the period covered by the chapter, and I was aware that the documentary evidence was originally produced for a specific purpose and a specific audience (Yin, 2018).

### 3.7 SUMMARY OF METHODS

A mixed set of methods was used for the research underpinning the publications included in this thesis. Their use is summarized in Table 1 below.

**Table 1: Research methods**

<b>Methodology</b>	<b>#1</b>	<b>#2</b>	<b>#3</b>	<b>#4</b>	<b>#5</b>	<b>#6</b>	<b>#7</b>	<b>#8</b>	<b>#9</b>
<b>Desk research</b>	✓	✓	✓	✓	✓	✓	✓	✓	✓
<b>Industry data</b>		✓	✓	✓	✓	✓	✓	✓	✓
<b>Archival research</b>			✓						
<b>Case studies</b>		✓	✓		✓			✓	✓
<b>Interviews</b>		✓	✓			✓		✓	

## 4 CONCLUSION

The nine works selected for this appraisal form a significant body of work and offer coherence within the two themes introduced at the beginning of this thesis. Two central questions are examined:

- What do book publishers do?
- How is the book evolving?

My work has advanced the understanding of both these questions and offers an original contribution to knowledge. For REF 21 originality was understood as ‘the extent to which the output makes an important and innovative contribution to understanding and knowledge in the field’.

Overall I have added coherent analysis and new insights to our understanding of the book industry, devising models, offering new interpretations, and moving on beyond simple descriptions of what publishers do. My publications show why publishing operates in certain ways, how publishers can and do add value, and what challenges they face from digital and other developments. I have shown how the business model of the book remains robust, and why the print book continues to demonstrate resilience as part of a broader family including the ebook and audiobook.

### 4.1 THEORY AND ANALYSIS

New concepts have been advanced in my works alongside structured analysis of the industry and its operations. The publications not only explain what publishers do and how they add value – they also show why some functions are carried out by third parties (#3 and #8). Models advanced include the value chain in publishing (#1), which shows how publishers add value to content. In #2 there is a detailed examination of the ecosystem of the digital book. Broad themes are explored including the democratization of authorship, the globalization of the book, and slow books. The concept of digital capital (#2) shows how publishers need to connect with readers, and the importance of the co-creation of value. The tripartite model of the book (#9) goes beyond a technical definition of the book to advance a dynamic model which shows how a book is not just an information architecture but also occupies a special place in society, which grants it privileges such as lower taxation and prestige. The book also has a reliable business model with clear boundaries. Understanding the business model helps us to separate the book from other media such as journals and magazines.

The concept of the vanilla ebook from #2 is well established and is complemented by the vanilla audiobook introduced in #9. The value chain from #1 informed the structure and analysis of #5. #8 identified the literary agent as taking on the new role of literary manager, representing the author's interests in whatever media format works for the material. This is encouraging the development of larger agencies, working across books, audio, film and TV.

#6 examines the area of corporate social responsibility, producing a stakeholder map of publishing. Taking again the question of the role of the publisher, the necessity is highlighted for publishers to take responsibility for their content. The expectation from readers is that content should be credible, and this surely highlights key value that publishers can bring, and ought to bring, to their content. Investment in the areas of selection, quality control and editing is not wasted and must be highlighted to readers and consumers. In the area of sustainability, a calculation is made of the carbon footprint of the book, comparing the ebook to print.

The methodology used in #4 enables us to look at how the industry has developed over longer periods, and clearly identified was a break from the established pattern of the industry growing alongside the economy. Possible reasons for this break are advanced including changes in the retail landscape and the lack of growth in real personal incomes.

## 4.2 CONTRIBUTION TO KNOWLEDGE

The works in this thesis have contributed to the increased rigour, theoretical underpinning, and analysis of the publishing industry demonstrated today by the field of publishing studies. I have contributed three monographs, a handbook, book chapters and journal articles, alongside my editing of the journal *Logos* and running the international research conference, *By the Book* (now in its eighth year).

My works have been widely cited and are used on publishing programmes in many countries. In terms of metrics, I have 1105 citations in Google Scholar with an h index of 14 and an i10 index of 16 (23 June 2023). A bibliometric study of journals named myself as one of the key authors in publishing studies (Augustyn, 2022). The author also mentioned that books and chapters (not part of the study) contributed a significant proportion of my output – she formulated this as 41.7 per cent. Indeed the chosen publications for this critical appraisal (with one exception) are all published in book form. An international study of reading lists from courses in publishing

studies found that the second most cited monograph was #5, second to Thompson's *Merchants of Culture* (2012). Overall I was the third most cited author after John Thompson and Alison Baverstock (Pehar and Selthofer, 2015). My publications have contributed to the education of thousands of publishing professionals around the world; and some of my former students are now teaching publishing studies themselves in China, France, Indonesia and Nigeria.

In the area of impact, I have been invited to speak at many industry conferences and events, for example addressing 1500 Chinese publishers in November 2021 on the topic of international trends in book publishing. In February 2023 I gave a talk at the Rights forum at the Delhi International Book Fair. The book *Inside Book Publishing* is used by industry professionals as well as by publishing programmes in many countries. The works covered in this thesis have been translated into nine languages. I have contributed to the national conversation about books through appearances in the media, such as in the *Guardian* and *Financial Times* and on the BBC (both TV and radio). My consultancy and training work, alongside my publications, has contributed to the development of the international publishing industry.

#### 4.3 FUTURE RESEARCH

Research areas of vital interest in publishing studies include AI and sustainability. Will AI flood the market with content to the detriment of books produced by mainstream publishing; or will this only serve to highlight the value added in the publishing process? What is the sustainable future for the book and how do we demonstrate to readers that books are produced in a sustainable manner?

My research is ongoing across the areas of the two central questions of this thesis.

- a. Discussion with industry professionals at the Frankfurt Book Fair in 2022 opened up further debate about what publishers do. Some maintain that publishing today is principally marketing – especially as more editorial work is outsourced whether to services companies or literary agents. Others that publishing is at its heart project management – again this fits with the outsourcing of ever more work to third parties (and potentially AI).



- b. In terms of how the book is evolving, the boundaries between academic book and journal publication are becoming ever more blurred, as identified in #9 and from the recent study of research monographs (Shaw, Phillips and Gutiérrez, 2022 and 2023).
  
- c. The industry has become interested in the questions raised in #9 and I will be participating in a panel discussion on what is a book? at the Frankfurt Book Fair in 2023. The necessity to improve book statistics within the international industry has been highlighted by the new President of the IPA, Karine Pansa. (IPA, 2023)
  
- d. The enquiry in #6 will be pursued with an article about the ethics of publishing. This will draw on theory from business ethics and moral philosophy to ask how an ethical publisher should behave.

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## 6 APPENDIX - LETTERS FROM CO-AUTHORS

6.1 LETTER FROM GILES CLARK FOR *INSIDE BOOK PUBLISHING*, #5

**Giles Clark**

**The Bothy  
Berkhamsted Place  
Berkhamsted  
Herts  
HP4 1HQ**

**Telephone 01442 874347**

**Mobile 07932 712122**

**Email [gilesbothy@btinternet.com](mailto:gilesbothy@btinternet.com)**

Angus Phillips  
Headington Hill Hall  
Oxford Brookes University  
Gipsy Lane Campus Headington  
Oxford  
OX3 0BP

2 February 2023

Dear Angus

***Inside Book Publishing***, Routledge, 4<sup>th</sup>, 5<sup>th</sup> and 6<sup>th</sup> Editions

In support of your PhD by publication, I set out your enormous contribution as co-author of *Inside Book Publishing* from the 4<sup>th</sup> Edition published in 2008 through to the 6<sup>th</sup> Edition published in 2020.

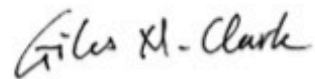
Giles Clark wrote *Inside Book Publishing*, first published in 1988, the second edition (1994) and the third Edition 2001. However, Angus Phillips joined as co-author on the 4<sup>th</sup> Edition (2008). It marked a step change in the development of the book. Angus brought significant new ideas for additional content, structural re-organization, publishing research knowledge, and teaching and illustrative approaches. His major innovations were to commission contributions from a wide range of specialists and to recruit peer reviewers. The standing of the book was evidenced by sales dominance as an adopted text and translation into Korean and Chinese simplified, and other translation interest included a Romanian version.

The 5<sup>th</sup> edition (2014) was marked especially by Angus making the text more international in scope through the commissioning of overseas experts. The edition highlighted the growth in globalization, concentration in ownership, the rise of Amazon, the increase in e-book sales and that of self-publishing, and the transition from physical to digital.

The 6<sup>th</sup> edition (2020) increased to 417 pages, and included 20 contributors commissioned by Angus. It captured the major changes affecting the industry such as slower growth in e-book sales, explosive growth in audio, resilience in printed book sales, the shift to digital learning, and the transition to Open Access in journals. Diversity in authorship, readership and amongst the workforce continued to challenge the industry. The book maintained its classic status as the leading text on publishing in the UK and many places overseas, including the USA and Australia.

The proportion of Angus's imagination, knowledge and effort to that of Giles has increased on each of the above editions. On the 6<sup>th</sup> edition, it was more than 80%.

Kind regards



Giles Clark

Co-author *inside Book Publishing*



## 6.2 LETTER FROM MIHA KOVAČ FOR *IS THIS A BOOK?*, #9

Miha Kovač, PhD  
Professor at department of  
Information and Library Science and Book Studies  
School of Arts, University of Ljubljana

Ljubljana, September 9<sup>th</sup> 2022

To whom it might concern

This is to confirm that Angus Phillips is the first author of the book *Is This a Book*, published by Cambridge University Press in Elements series in July 2022 and co-authored by me. Both authors contributed about 50% of the book content.

Miha Kovač



## 7 THE PUBLISHED WORKS IN THE SUBMISSION

The publications can be found in digital form in this Google Drive folder:

<https://drive.google.com/drive/folders/1EX8euf6r11ob4YEn8fe6N2-FauYQQkgG>