

A N N U A L R E P O R T



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ABOUT US

The Publishers Association is the member organisation for UK publishing, representing companies of all sizes and specialisms.

We exist to champion publishing to the wider world and to provide our members with everything they need to thrive. We have helped change laws, improved business conditions and inspired people to become publishers.

Our members produce digital and print books, research journals and educational resources across a number of genres and subjects. Collectively, they form one of the UK's leading creative industries, exporting worldwide to educate, inspire and entertain.

“We are passionate about the capacity for books and reading to make life better for people.”

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CEO'S REPORT

Dan Conway
CEO
Publishers Association

2022 was a year characterised by change. For the industry, it was the year where a sense of normality began to resume after a period of what can only be described as unparalleled disruption. We had our first in-person London Book Fair since the pandemic, followed by Frankfurt, and more recently Bologna. We began to gather at events, both in the UK and abroad, and I for one was glad to be surrounded by so many familiar faces again.

For me personally, I stepped up to become CEO of the Publishers Association. I have been incredibly proud to take on the role and I would like to sincerely thank all members for their support this year and, in particular, Publishers Association Officers Nigel Newton, Antonia Seymour and David Shelley for their time and counsel.

For the Association, sustainability has continued to be a strategic focus and this year we launched our Carbon Calculator and Materials Matrix. Both of these sustainability tools are the first of their kind and completely bespoke to the publishing industry. They follow on from our Publishing Declares pledge and show further commitment from us and our members in working towards a more sustainable future.

As ever, copyright has also been a major focus and one that binds our membership together. As Artificial Intelligence develops and law-makers consider the impacts, we must continue to strongly make the case for a strong and stable legal framework and balanced regulation. That is why, following months of hard work from the Publishers Association, we welcomed the government's decision not to proceed with a blanket exception to copyright for text and data mining for any purpose. This also followed the very welcome decision in January 2022 not to amend the UK's copyright exhaustion regime.

Another highpoint to report this year has been progress made in the area of content protection and enforcement. Our team provided critical assistance in the global shutdown of the 200+ domain pirate network, Z-Library, working with international law enforcement. The team's work in this area will continue to progress next year, including supporting members with a wider set of online piracy platforms.

Towards the end of the year, we also finalised the second iteration of the Publishers Association 'Inclusivity Action Plan'. Looking back at our original plan, published in 2017, the sector has made significant inroads. Publishers have worked hard to move the needle, but as always, there is still more work to be done in this area next year.

We have a lot to be proud of. You'll see in the pages of this report some of the Publishers Association's key achievements, but what you don't see is the time and dedication from all of our members in helping us drive this work.

"Whether it be advice on specific issues, being involved in our working groups and Councils, or helping gather crucial data, we can only say thank you and ask that you continue to see the value of what we can achieve together."

We are pleased with the progress we have made over the past year, and we look forward to continuing to proudly champion the value of publishing – across the academic, education, and consumer sectors – both for society and for the UK economy next year.



LETTER FROM THE PRESIDENT

Nigel Newton
President, Publishers Association
Founder & Chief Executive, Bloomsbury

It has been a joy to serve as President of the Publishers Association for the last year. It is over all too quickly. Having been used to identifying with Bloomsbury, the company I started in 1986, I found it very refreshing to work for our industry as a whole. How fortunate we are to work in an industry with meaning and a social purpose, underpinned by so much talent and commitment.

When my term started, the publishing industry was riding a wave of success post the lockdowns. Sales of physical books were up a staggering 13% on the previous year and 56% of people surveyed by the Publishers Association said they were reading more. One of my great hopes as President was to support further growth in the book market and readership, and stronger financial sustainability for publishers in the face of external threats.

Our industry never fails to rise to the occasion. In the face of challenging economic headwinds, the number of independent bookshops reached a 10-year high in 2022. At the same time, more than half of young readers credited BookTok with helping them discover a passion for reading, with many inspired to visit physical bookshops. From ever dependable local bookshops to the transient social media app, this fulfils a goal that unites us all – getting more books into the hands of more readers.

Digital markets are also essential to that goal, but the long-term interests of readers, authors and publishers are not served by the unparalleled dominance of a small number of global tech giants. We made it clear to government that digital markets benefit consumers and businesses most when they operate in a fair and transparent way and are not exploited by dominant firms. With great power comes great responsibility. That's why I am very happy that government has been convinced to bring forward the Digital Competition Bill, which will empower the Digital Markets Unit, in this parliamentary session.

Planned throughout 2022 and launched in early 2023, the Publishers Association sparked another fascinating conversation on global influences in its report, *The English Exchange*. With input from the British Council,




National Literacy Trust, Association of Authors' Agents and English Speaking Union, the report looked at how English is used and perceived globally. In the discussion that followed, panellists explored English as both a polarising post-colonial force and a benign and powerful vehicle for cultural exchange. This was just the start of the conversation and underlined how our books, authors and work as publishers inspire ideas and debate.

The power of books to inspire and educate has a new champion in the Queen Consort. I joined fellow publishers, authors and literacy charities for a reception hosted by her earlier this year to celebrate The Queen's Reading Room. This thriving book community has now become a charity providing opportunities for the appreciation of literature among adults and children in the UK and around the world. Along with their many other charitable initiatives, I know that publishers will play a great role in supporting her.

"I want to thank fellow members for their collective efforts to navigate challenges and bring about change. It has been particularly heartening to see the progress that has been made on sustainability and diversity by working collaboratively. My thanks also go to the team at the Publishers Association, and in particular their new CEO Dan Conway with whom I have worked closely in his first year, for their efforts to support our industry."

As I sign off as President, I am confident that our industry is in rude good health and looking to the future with appetite and an open mind. Thank you all for your support and the role you play in this.

216 **178** **38**

Total Members  Members  Associate Members 

15 **650**

Events    with over  Attendees



71,548

followers on

9 

industry and sector reports

48 

meetings of our Councils and Groups

100+ 

meetings with parliamentarians and officials

VALUE OF PUBLISHING



Publishing brings ideas and stories to life

The Publishers Association has worked over a period of years to develop a strategic framework and new narrative to help communicate our sector's value. By galvanising our collective pride and action, we hope to build awareness, understanding, interest and advocacy among stakeholders, encourage more people to engage in publishing, and ultimately, inspire more people to join the publishing world.

At the start of 2022, we released an exciting new video which aims to help tell publishing's story to our key audiences. The video is the first piece of content linked to a new industry narrative to help communicate the publishing industry's personal, social, economic and innovative value.

The content of the video touches on consumer, academic and education publishing from the perspectives of authors, educators and booksellers about the industry's positive impact.

This was well received and the video continues to perform strongly, with over 6,000 views solely via the Publisher Association's Twitter handle. The narrative continues to be built into briefings, speeches, publications and digital content.

"Publishing brings ideas and stories to life.

We produce trusted information. We connect creators and audiences. And we underpin the global knowledge economy.

At a time when the pandemic has driven us apart and society has become more polarised, we help people create moments of true connection – sharing what they love, debating ideas and celebrating the voices that mean most to them."

#BookThatMadeMe



A key campaign linked to the personal value that publishing offers which encourages people to share personal stories about a book that changed their life whether that was developing a love of reading, helping to find a moment of calm or determining their career choice – big or small, profound or simple.

#BookThatMadeMe has been brought to life across social media, as well as through research and content in media activity.

The BookTok Generation



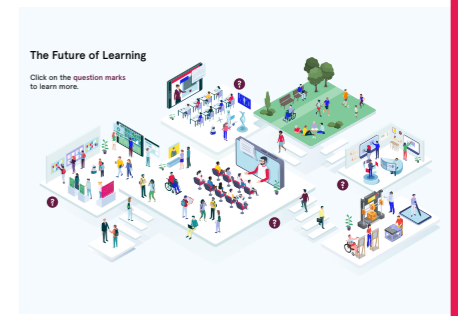
Research from the Publishers Association found that BookTok, the social media trend focusing on books and literature, is playing a key role in getting Gen-Z reading.

Key findings included:

- 59% of 18-25 year-olds say that BookTok or book influencers have helped them discover a passion for reading
- Over half (55%) turn to BookTok for recommendations
- Two thirds say that BookTok has inspired them to read a book that they would have never considered otherwise
- Nearly half (48%) of respondents visited a physical bookshop to buy a book they have seen on BookTok

It's been great to see that the BookTok phenomenon is igniting a love of reading for young people. The findings were covered in CityAM, MSN News and the Bookseller.

Future of Learning



We launched a new digital visualisation of what learning could look like in the near future, identifying four key areas driving innovation:

- The growing possibilities of EdTech
- Assessment and the focus on future-critical skills
- Teachers as facilitators, not presenters
- School as a hub

The four key areas are the ones education publishers believe will influence, innovate and evolve how teaching happens and pupils learn across both primary and secondary schools. At the heart of these is the unanimous belief that education needs to move towards a more learner-centric model, advancing a personalised education system to positively impact students' progress and granting opportunity to all.

New Industry Insights Portal

We launched *Industry Insights* in July, an interactive dashboard containing full industry sales data from what was previously known as the Yearbook, containing data from across sectors, formats and markets. We were excited to launch this tool as part of our commitment to continuously refine our research and statistics work and bring members the valued information they need.

The dashboard allows Publishers Association members to run their own analysis via tables and charts, looking at trend data for up to six years and download the results at the push of a button. The dashboard can be accessed via the members area of the Publishers Association website.



Value of Academic Publishing animation

In November we released a new animation that shows how academic publishers add value at different stages of the journal publishing process. The video showcases how publishers help make research accessible, discoverable and useable for everyone, explaining the process and the publisher's role in it.

It outlines six main stages of the journal publishing journey, demonstrating how academic publishers support researchers to validate results, present them effectively, share findings among groups of readers and communicate them to the wider world.

Publishing in 2021

Publishing in 2021 was published in April, and featured key numbers and commentary around sales income, formats and key export markets. The shortened version of our annual industry statistics highlighted that 2021 was another tremendous year for UK publishing, and the strongest we have seen.

The total revenue of UK publishing rose 5% to £6.7 billion. UK income rose most, by 7% to £2.7 billion while export sales income increased by 2% to £3.8 billion.



SUSTAINABILITY

Carbon Calculator and Materials Matrix

In 2020 we launched our Sustainability taskforce and since then we have been working on tangible outputs to help our members on their sustainability journeys. The Sustainability Taskforce now has over 65 members from the largest to the smallest publishing businesses covering all sectors of the industry. It is chaired by Helen Griggs of Cambridge University Press & Assessment.

In October 2021 we created and signed the Publishing Declares pledge, committing to working towards a more sustainable and greener future. By the end of 2022 we had 115 signatories to the pledge.

In our commitment to the Publishing Declares pledge, and our role in helping members meet their sustainability goals, in 2022 we launched a Carbon Calculator and Materials Matrix.

“The Carbon Calculator enables members to monitor their carbon outputs across their business, including different sites, projects, and departments. The Materials Matrix enables members to understand how sustainable different materials that make up a publication are, and what alternative materials would look like.”

Both tools together allow publishers and those in design and production to understand the sustainability implications of different processes and materials, enable them to make informed decisions, and choose more sustainable options. Currently the tools only apply to printed products but we are currently scoping out how to incorporate digital in the future.

These tools are available for all members of the Publishers Association at sustainability-publishers.org.uk/ and can be accessed by emailing sustainability@publishers.org.uk for login credentials.

115
Signatories in 2022

INCLUSIVITY

UK Publishing Workforce: Diversity, inclusion and belonging in 2021

In March 2022, we released the *UK Publishing Workforce: Diversity, inclusion and belonging in 2021* survey which showed that there had been an increase in diversity of the workforce, but that there were still areas which needed to be improved on. The survey remains the biggest of its kind in the creative industries with a total of 14,089 employees from 60 publishing businesses taking part.

Key findings from the survey found:

- Over half of those in executive leadership and senior management positions were female (52% and 56% respectively). 63% of the entire workforce survey respondents were female.
- Representation of people from ethnic minority groups (excluding white minorities) increased to 15%, achieving the Publishers Association's target set for 2022.
- LGB+ representation continued to increase further with 13% of respondents either identifying as lesbian, gay, or bi, or preferring to self-describe their sexual orientation, a figure which has grown each year since 2017 (5%).
- 1% of respondents identified as trans which was in line with the UK population according to Government Equalities Office estimates.

- The representation of people with a disability increased over the years from 2% in 2017 to 13% in 2021.
- Socio-economic background continued to represent major barriers to inclusion, with around two thirds (67%) of respondents being from professional backgrounds.

The Publishers Association continued to work with publishers and partners throughout 2022 to plan the next phase of inclusivity work, including work on an Inclusivity Action Plan for 2023.



Careers in publishing

For the tenth year running, Work in Publishing week returned to inspire the next generation and help them learn more about the publishing industry. To further demonstrate commitment to encouraging the next generation of diverse talent in publishing, in November the Publishers Association, the Bookseller's Association and the Association of Author's Agents announced a collaboration on the development of OpenBooks – a brand new series of free, accessible online events primarily targeting young talent from underrepresented backgrounds. OpenBooks launched to the trade with a conversation on the subject of future talent at the Bookseller's FutureBook Conference.

There's always more to the story when you **#WorkInPublishing**

Work in Publishing
14-18 November 2022



CHAMPIONING SECTORS



Academic

The Academic Publishers Council saw Torie Eva of Elsevier become the new chair towards the end of 2022, succeeding David Ross of SAGE Publishing. The Council engages with a wide range of policy makers across the international science ecosystem and works with Jisc and UK Research and Innovation (UKRI).

Torie Eva, Chair of APC
Elsevier



Consumer

Throughout 2022, the Consumer Publishers Council (CPC) was chaired by Perminder Mann of Bonnier Books. The Council has been involved in the development of OpenBooks, a new digital careers event to reach the next generation of publishing talent which took place in February 2023 and was awarded Arts Council funding to support the initiative. CPC also focused on issues including new relevant government appointments and their implications for the sector as well as supply chain issues.

Perminder Mann, Chair of CPC
Bonnier Books UK



Education

Chaired by Lindsay Nadin of Pearson the Education Publishers Council discussed developments in the ongoing engagement with the Department for Education and Oak National Academy. The forum provides an opportunity to look at matters that impact the market for educational books in the UK. The Council was also involved in the development of the Future of Learning digital asset which provides a visual representation of an ideal school of the future, featuring cutting-edge and interactive technology and resources.

Lindsay Nadin, Chair of EPC
Pearson



Higher & Further Education

Our Higher and Further Education Publishers Council is chaired by Katie Thorn of Macmillan Learning, and provides a forum to address the issues of importance to publishers of both print and digital courseware and teaching learning resources for the higher and further education communities in the UK and internationally. Throughout 2022, the Council discussed issues including those around content protection, piracy and policy.

Katie Thorn, Chair of HFEP
Macmillan Learning



Accessibility

During 2022 the Publishing Accessibility Action Group (PAAG), chaired by Stacy Scott of Taylor & Francis, launched the PAAG Charter for Accessible Publishing. The Charter aims to highlight a commitment to ensuring that ebooks and other digital publications are accessible to those with print disabilities. The group has been running for over 10 years and brings publishers together with advocacy organisations who are committed to supporting the development and distribution of accessible publications.



Audio

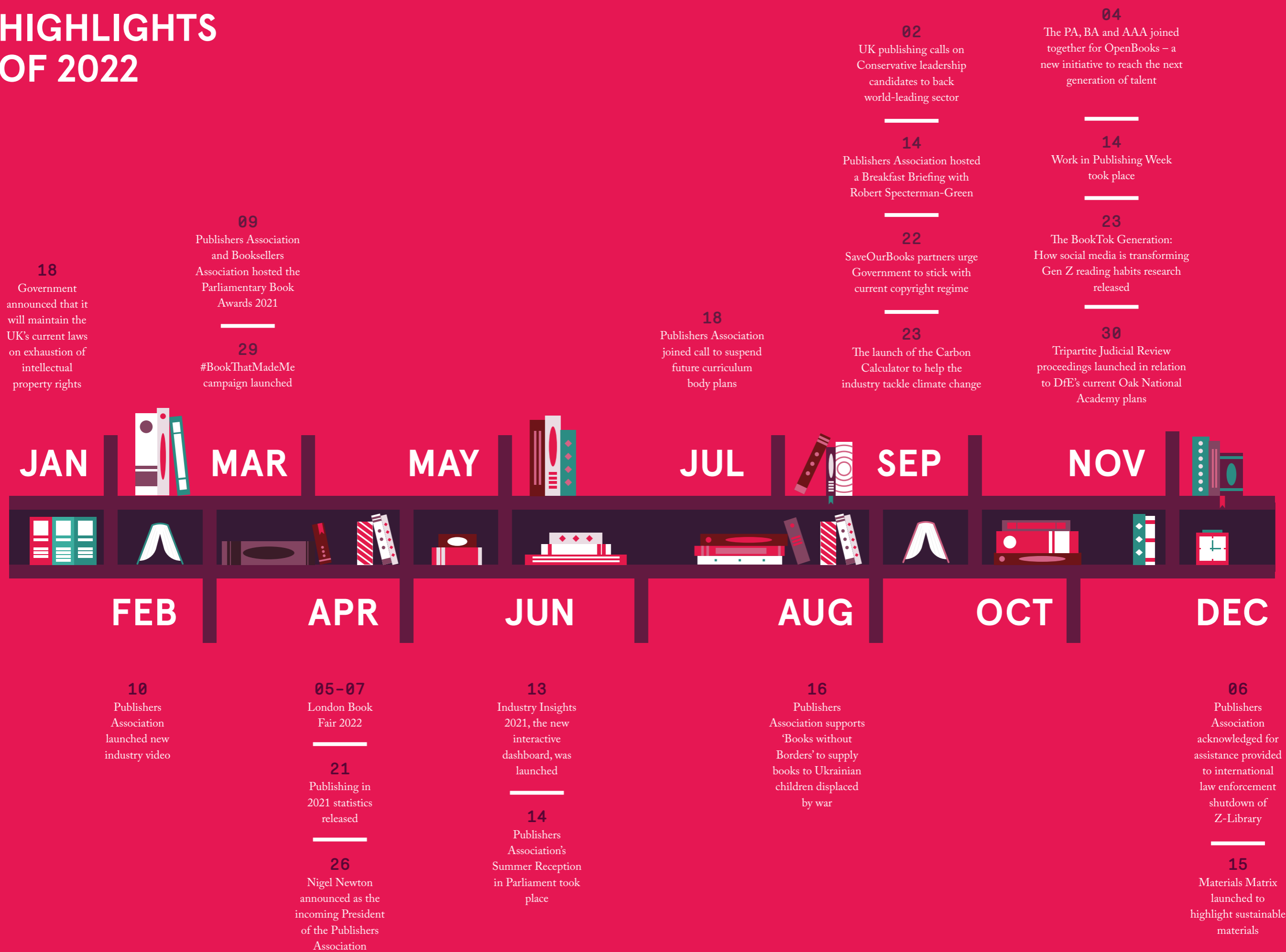
Towards the end of 2022, the Audio Publishers Group saw Jon Watt of Bonnier Books take over as chair succeeding Dominic Gribben of Hodder. The group is made up of audio publishers who have an interest in raising the profile of the audiobook industry as well as monitoring policy and legal matters that impact the sector.



Children's

Chaired by Aimée Felone of Knights Of and Rebecca McNally of Bloomsbury, the Children's Publishers Group meet to discuss the promotion of children's book as well as policy and initiatives around reading for pleasure and literacy. During London Book Fair, the group participated in the Children's Book Pitches where a number of publishers highlighted upcoming titles to a room of indie booksellers. The group was joined by external speakers including World Book Day and from a number of booksellers.

HIGHLIGHTS OF 2022



LEGAL

The Publishers Association utilised legal expertise across many aspects of its work in 2022. An important focus continues to be the interplay with our policy and public affairs workstreams: the examination and monitoring of legal aspects of legislative and regulatory developments that may impact upon publishing. Important examples in 2022 were the proposed exception to copyright for text and data mining for any purpose (and its incompatibility with the UK's international treaty obligations), proposals for regulation of digital marketplaces, and the yet to be resolved final decision on the UK's permanent choice of exhaustion of rights regime.

Another major challenge has been the Department for Education's decision to back Oak National Academy with £43m over three years to produce full curriculum packages across a wide range of key stages and subjects. This will profoundly impact the thriving competitive market for educational resources, as well as teacher autonomy and pupil outcomes. During 2022, a coalition of concerned entities (the British Educational Suppliers Association, the Publishers Association and the Society of Authors), brought a legal challenge to the process and substance of the decision through judicial review. The National Education Union (NEU) also joined as an interested party. This was not a step taken lightly and is entirely a measure of last resort. We remain hopeful of and committed to a resolution of the matter next year.

Also during 2022, the Ministry of Justice consulted on a form of vexatious litigation known as SLAPPs (Strategic Lawsuits Against Public Participation) which it characterised as *"an abuse of the legal process, where the primary objective is to harass, intimidate and financially and psychologically exhaust one's opponent via improper means"*. With input from Publishers Association members, we made a submission on the case for legislative change before the government issued its response announcing that it would take that step.

Another major plank of the legal work of the association is its link with our content protection and enforcement function, which this year saw us support civil and criminal enforcement action related to the November 2022 shutdown of Z-Library, and bilateral outreach with platforms to address content protection and enforcement issues, including unlawful parallel imports and piracy.

Our work in 2022 also included:

- providing guidance and briefings on topical issues facing publishers, including on AI/TDM, copyright law, defamation law and SLAPPs, accessibility legislation, retained EU law, record keeping obligations under the ICO journalism code of practice and the emerging legal framework around sustainability;
- advocating for strong copyright laws and enforcement frameworks at home and abroad;
- liaising with the Competition and Markets Authority and other governmental, regulatory and enforcement authorities (including PIPCU) on legal issues impacting publishers;
- representing the association and its members in key stakeholder discussions and negotiations;
- ensuring the association remains compliant with relevant laws and regulations and updating and modernising its governance documents.

CONTENT PROTECTION AND ENFORCEMENT

2022 saw the Publishers Association take further strides towards establishment as an industry mark of excellence for content protection and enforcement activity and the go-to authority for members and government on piracy issues in the book and journal markets.

We have deployed an expanded remit and budget this year, deriving benefit across the entire book and journal ecosystem. We welcomed a new specialist team member with a wealth of expertise and strong ties to law enforcement, bolstering our role in coordinated enforcement action against collectively agreed targets.

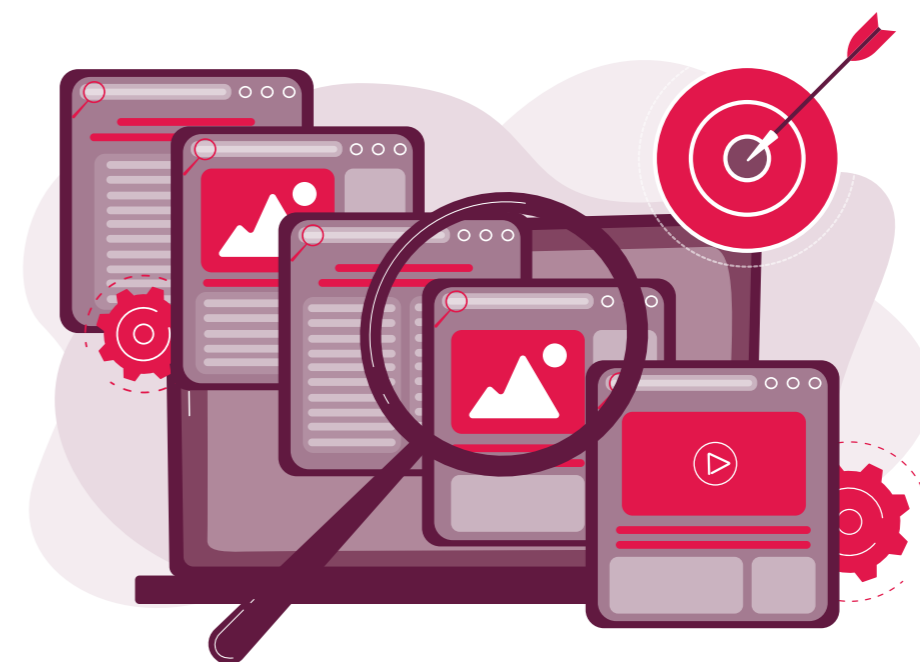
In 2022, we continued to evaluate piracy threats and take strategic steps to address them, working closely with our Anti-Piracy Working Group (steered by two newly elected co-chairs), Law Group and other member representatives. We conducted a first-of-its-kind member survey to examine the publishing piracy landscape, identify collective priorities and shape our future strategies. We were publicly recognised by the US Department of Justice for providing critical assistance to the global shutdown of publishing's most egregious piracy threat; the 200+ domain Z-Library network. We have strengthened our engagement with the UK Police Intellectual Property Crime Unit and built relationships with leading law enforcement agencies around the world. We have progressed civil and criminal enforcement actions, including website blocking proceedings, criminal referrals and intermediary outreach, to protect and enforce our members' intellectual property.

We have continued to tackle content protection issues faced by publishers on Amazon through bilateral outreach and have taken steps to seek to replicate this process with other platforms.

We have responded to content protection issues affecting our members in overseas markets and notably in China, where we have expanded upon our work in partnership with a coalition of international publishers.

Our Copyright Infringement Portal has continued to provide members with access to 'notice and takedown' services at no extra cost and can now identify infringements on online marketplaces and social media platforms. We encourage all members to ensure that they are making the best use of this member benefit.

"We continue to champion the interests of UK publishers in key stakeholder dialogues and groups and support publishers of all sizes in protecting and enforcing their intellectual property."



POLICY AND PUBLIC AFFAIRS

Amidst what felt like a particularly turbulent year for British politics, we engaged with successive rounds of Prime Ministers, Secretaries of State, Ministers, Shadow teams and officials responsible for our key policy areas, now across the Department for Culture, Media and Sport (DCMS); Department for Education (DfE); Department for Business and Trade (DBAT); Department for Science, Innovation and Technology (DSIT); and Intellectual Property Office (IPO).

Westminster

At the start of the year, we held the 2021 Parliamentary Book Awards in a ceremony at the Houses of Parliament. Mark Carney, Andrew Mitchell MP, Penny Mordaunt MP, and Chris Lewis were announced as the winners. The awards were established to champion the best political writing in the UK and to recognise the unique and vital link between the worlds of politics and publishing.

To highlight our ongoing #BookThatMadeMe campaign, our summer reception on the Parliament terrace was themed around 'a book that made me', to start conversations about the positive effect books have on each of us. MPs, peers, publishers, and leading figures in the UK book industry celebrated the power of books with Publishing APPG chair Andrew Lewer hosting and Jeffrey Boakye, author of *I Heard What You Said*, speaking about his experience as a teacher and the important role publishers play.

Throughout the year, we supported the Conservative Female MPs book club and arranged sessions including with the author Bonnie Garmus. Our annual Summer reading list for Parliamentarians linked to the #BookThatMadeMe campaign, with MPs and peers across the House suggesting books that had a positive impact on them.

We made a submission to the Lords Digital and Communication Committee's A creative future inquiry, with CEO Dan Conway then invited to give evidence in person. And we continued to work with the #SaveOurBooks campaign to urge the government not to change the copyright exhaustion regime and allow damaging parallel imports.

We ended the year with our annual Christmas prize draw for MPs, which saw over 90 entries. The winners received a collection of children's books for a deserving organisation in their constituency.

Whitehall

We continue to sit on the IPO copyright advisory board, the Trade Advisory Group for DBAT, and meet regularly with the team at DCMS responsible for publishing. We have also had ad hoc meetings with a wide range of key officials, and hosted the DCMS Director responsible for Media and Creative Industries at one of our Publishers' Licensing Services (PLS)-sponsored breakfast briefings for members.

We also fed into a number of consultations, including on the Online Sales Tax and Indian Free Trade Agreement negotiations. We worked alongside others across the creative industries to successfully persuade the government to reverse its proposed copyright exception for text and data mining (TDM). We continue to support the Digital Competition Bill too, ensuring digital markets are fair for publishers and readers.



World Book Day

2022 saw World Book Day celebrate its 25th anniversary. The Publishers Association supported by arranging and attending the annual reception at 10 Downing Street on the week of World Book Day, as well as operating a Parliamentary Drop-in session for MPs and peers. MC Grammar, Sirdeshpande and Allen Fatimaharan entertained children from a school in the Prime Minister's constituency of Uxbridge.

The Parliamentary drop-in session in Portcullis House on the 1st of March saw 136 parliamentarians stop by to speak to us about reading for pleasure, and to collect books for their own children.

The Publishers Association also helped to organise a gala event in celebration of the 25th anniversary, held at Hachette's head office on Victoria Embankment.



Books without borders

The Publishers Association supported the 'Books without borders' initiative to help produce 16,000 copies of Ukrainian language children's books to be distributed to Ukrainian refugee children of different ages in the UK. The aim of the initiative was to minimise the disruption to education, unite, and bring back the feeling of home. Publishers' Licensing Services (PLS) and book print specialists Halstan partnered on the project, which was organised in the UK by the Ukrainian Embassy, and was created under the patronage of Ukraine's First Lady, Olena Zelenska.

The project was formally launched at the British Library in August and attended by Ukrainian families. Ukrainian Ambassador Vadym Prystaiko thanked the organisations involved in the initiative, before handing over to Olena Zelenska via video link from Kyiv. Madam Zelenska spoke to the children present and encouraged them to treasure their Ukrainian stories.



EXPORT EVENTS



Book Fairs

In 2022, the Publishers Association organised groups at three book fairs for the first time since 2019. Our first trip was to the Bologna Children's Book Fair in March where we organised stands for 17 companies. At the time of the Fair, Italy still had some covid restrictions in place (temperature checks, covid passes and mandatory facemasks), but it was clear that people were pleased to be back having face to face meetings. Attendance was considerably down on previous years as some countries in Asia and many American companies did not attend.

In April, the Publishers Association team attended The London Book Fair and our Book Fair Services department organised stands for only three companies who had rolled over their bookings from 2020. Unlike Italy all covid restrictions in the UK had been removed and fair attendees were advised to wear facemasks but this was not mandatory. Like the Bologna Book Fair, there was a reduced presence with noticeable absences again from the USA and Asia. However, there was a positive atmosphere as people returned to another in person event.

In addition to organising and taking part in several seminar programme events, the Publishers Association's Policy and Public Affairs team organised governmental visits for Paul Scully MP, Minister for Small Business, Consumers and Labour Markets and a variety of other Westminster and Whitehall meetings.

Our final outing was to the Frankfurt Book Fair in October, where we organised stands for 16 companies. There were more international exhibitors and attendees at this fair but numbers were still down from pre-pandemic levels.

The Publishers Association's team consisting of Nigel Newton, CEO of Bloomsbury Publishing and Publishers Association President; Dan Conway, Publishers Association CEO and Catriona Stevenson, Publishers Association General Counsel held meetings with several international publishing executives and attended meetings with STM, IPA and FEP. Dan Conway spoke at the IPA's Sustainability Summit and the team attended a reception hosted by Dr Andreas Fabritius, the British Honorary Consul; Paul Smith OBE, Director British Council Germany and Britta Egetemeier, Publisher, Penguin Random House Verlagsgruppe. The reception was in honour of the Nobel Prize Laureate, Abdulrazak Gurnah.



Virtual Events

Following the launch of the virtual events programme in 2021 to support members in their export activities during a period of no international travel, we organised a series of similar events for 2022.

The programme began with an 'Overview of the Indian Market' to promote the report written by Shweta Khurana, Editor of All About Book Publishing magazine, India. This was followed by 'Doing Business in North America' to launch the two reports on Canada and the USA, written by Simon Littlewood, a publishing consultant. All three reports are now on the Publishers Association's Export Toolkit, a website funded by the Department for International Trade (DIT) to provide a resource for publishers to start their export journey or further develop their export strategy. We also had webinars on 'Accessing the International Schools Market' and an 'Overview of the Taiwanese Market'. A total of 135 members and associate members attended the four events.

Following the UK/China matchmaking event in 2021 for publishers of Children's and Academic & Professional books, the Publishers Association in partnership and DIT China, organised a follow-up event for publishers of trade and consumer books in 2022. During the two-day event, 18 members and 30 Chinese companies took part.

FINANCIAL OVERVIEW

Statement of Comprehensive Income for the year ended 31 December 2022

| | 2022 £ | 2021 £ |
|---|------------------|------------------|
| Turnover | 2,998,337 | 2,245,122 |
| Direct costs | (630,318) | (103,673) |
| Gross surplus | 2,368,019 | 2,141,449 |
| Administrative expenses | (2,509,932) | (2,295,971) |
| Other operating income | 154,987 | 156,413 |
| Operating surplus | 13,074 | 1,891 |
| Exceptional expenditure | (50,000) | - |
| Fair value movements | (22,250) | 7,342 |
| Bank and other interest receivable | 13,532 | 3,470 |
| Interest payable | (313) | (464) |
| Net interest on defined benefit scheme | (35,000) | (18,000) |
| Deficit on ordinary activities before taxation | (80,957) | (5,761) |
| Taxation charge | 4,044 | (7,085) |
| Deficit for the financial year | (76,913) | (12,846) |
| Costs of defined benefit scheme | 35,000 | 18,000 |
| Total comprehensive income for the year | (41,913) | 5,154 |

Statement of Financial Position as at 31 December 2022

| | 2022 £ | 2021 £ |
|---|------------------|------------------|
| Fixed assets | | |
| Intangible assets | 111,425 | 76,073 |
| Tangible assets | 100,042 | 121,321 |
| | 211,467 | 197,394 |
| Current assets | | |
| Debtors | 880,699 | 1,150,023 |
| Current asset investments | 215,715 | 80,967 |
| Cash at bank and in hand | 472,706 | 1,890,062 |
| | 1,569,120 | 3,121,052 |
| Creditors: amounts falling due within one year | (1,375,296) | (2,871,708) |
| Total assets less current liabilities | 405,291 | 446,738 |
| Creditors: amounts falling due after more than one year | (5,220) | (708) |
| Provision for liabilities | | |
| Deferred tax | (17,170) | (21,216) |
| Net assets | 382,901 | 424,814 |
| Reserves | 382,901 | 424,814 |

The financial information above does not constitute statutory accounts, as defined in Section 434, Companies Act 2006. The financial information has been extracted from the audited statutory accounts for the year ended 31st December 2022. These accounts have been delivered to the Registrar of Companies and carry an audit report which was unqualified and did not contain a statement under Section 494 (4), Companies Act 2006.

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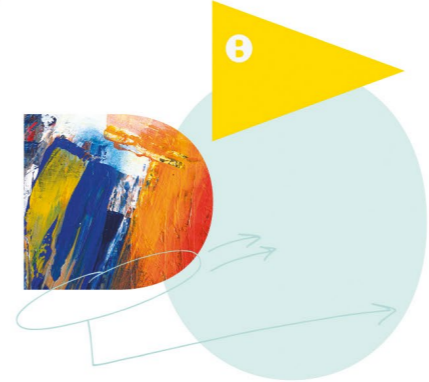
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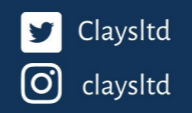


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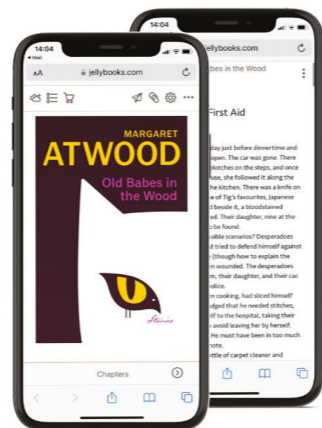
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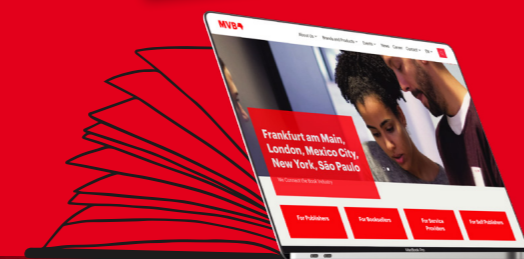
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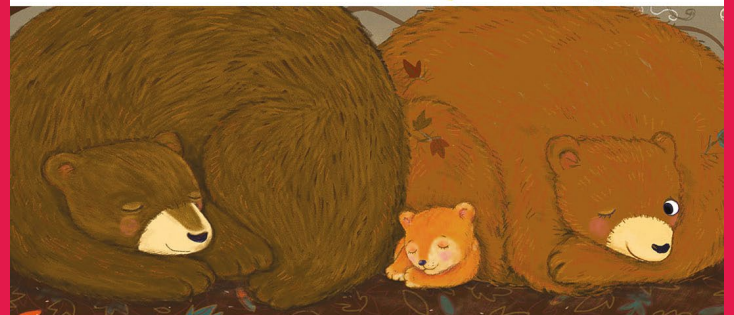
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