

From British Domination to Multinational Conglomeration? A Revised History of Australian Novel Publishing, 1950 to 2007

By Katherine Bode

Recent collections like *Making Books* and *Paper Empires* map an increasingly detailed history of contemporary Australian publishing.ⁱ Three generally accepted phases of that history are described. From the British-dominated trade of the 1950s and 1960s there emerged, in the 1970s and 1980s, an energetic and independent local publishing industry. In the 1990s, this ‘golden age of Australian publishing and the promotion of Australian literature’ⁱⁱ ended as multinational conglomerates entered, and came to dominate, the Australian book market. As Brigid Magner asserts, ‘Transnational corporations have now begun to assume the role formerly occupied by British publishing companies’.ⁱⁱⁱ While describing trends in the publishing industry as a whole – including general, educational and trade publishing, and the reprinting of local and overseas books by Australian companies as well as the production of original, Australian titles – the basic shape of this history is generally assumed applicable to all aspects of publishing. This is not the case, however, for a particularly high-profile part of that industry: publishing new Australian novels. Using the *AustLit* database^{iv} I compiled a list of publishers of new Australian novels from 1950 to 2007, and ranked them according to the number of titles they produced per decade. The tables in the appendix show the top ten publishers of Australian novel titles for each decade, the approximate number these publishers produced, and the proportion of the decade’s total novel output this represents.^v This data reveals not British domination leading to multinational conglomeration but a concentrated and Australian-dominated industry opening up to an increasing diversity of publishers, Australian and other.

I chose to focus on Australian novels because of the significant and illuminating hinge this fictional form provides between debates about cultural nationalism on the one hand, and publishing on the other. The historic relationship of the novel and nationalism^{vi} was explicitly fostered in Australia by critics like the Palmers who, in the 1920s and 1930s, emphasised the importance of the novel to national identity.^{vii} This established relationship between the novel and Australian nationalism accounts for, and in recent times has been compounded by, the strong associations drawn between the fate of this fictional form, and the fate of the Australian publishing industry. At present, this association is most commonly expressed in the idea that both industry and book are dying.^{viii} I aim to resist and complicate this narrative of decline, while exploring some of the complex ways in which both the novel and the industry are Janus-faced: turned to the national and the transnational, the cultural and the commercial.

British domination: – 1970

Craig Munro and John Curtain begin a chapter on Australian publishing ‘After the War,’ with the observation:

The history of the book in Australia may be characterised as the movement of durable cultural goods over very large distances. Raw material was dispatched to Britain in the form of stories and other texts to be converted into books at the industrial heart of Empire. These were then shipped back to the Antipodes along with numerous other books to satisfy the prodigious appetites of Australian

readers. Local publishing was a sideline undertaken by enterprising printers and booksellers.^{ix}

Contrary to this accepted view, five of the top six publishers of Australian novel titles in the 1950s, and three of the top five in the 1960s, were Australian. In order of their ranking, these companies are: Horwitz, Cleveland, Action Comics, Calvert and Angus & Robertson in the 1950s, and Cleveland, Horwitz and Calvert in the 1960s.^x This finding does not deny that British publishers exported a huge volume of books to Australia.^{xi} But it does challenge the idea that Australian books only or even predominantly became material objects in Britain. It also contradicts Curtain's related argument that, 'In 1953 there were only three Australian publishers – A&R, MUP and F.W. Cheshire – who produced more than 10 titles per annum'.^{xii} In fact, Cleveland and Horwitz published around 400 novel titles each in the 1950s, and significantly more than that in the 1960s.

The top five Australian publishers of the 1950s were responsible for approximately 61 percent of Australian novels published that decade; in the following decade, the top three Australian companies published 63.7 percent of titles. Cleveland and Horwitz alone were responsible for 41.9 percent of Australian novels in the 1950s, and 60.8 percent of titles in the following decade.^{xiii} Horwitz's prolificacy has been noted.^{xiv} But the comparable – indeed, greater – output of Cleveland, and the remarkable proportion of mid-century Australian novels produced by these companies, has not been adequately recognised.^{xv} Certainly, these findings show that local publishers were responsible for a far greater proportion of Australian novels than has been assumed based on accounts that stress British domination of the industry.

The virtual invisibility of Australian companies like Cleveland, Horwitz and Calvert in histories of Australian publishing can be attributed to their production of mass-market or pulp fiction novels. Although these companies have been considered unworthy of inclusion in histories of Australian publishing,^{xvi} attention to them yields valuable insights into industry trends. The success of these mass-market publishers suggests the productive as well as restrictive consequences of British control over book imports into Commonwealth countries. This control was formalised in 1947 in the *British Traditional Market Agreement (BTMA)*, which ruled that:

Australia-owned publishing companies were not permitted to acquire separate rights to British-originated books. A British publisher buying rights from an American publisher automatically obtained rights to the whole British Empire (except Canada); the US publisher as then obliged to cease supplying the book to Australia and could not sell Australian rights to any Australian publishers.^{xvii}

The negative consequences of this agreement are frequently described. But when these mass-market companies are brought into view, the BTMA emerges as also responsible for the enormous number of Australian novels published locally in this period. Unable to 'acquire separate rights to British-originated books', or to American-originated books where British publishers were involved, these companies had little alternative but to use Australian authors. Ironically, then, most Australian novels of the 1950s and 1960s were published because of the disadvantageous imperial organisation of the mid-twentieth century book market.

Much remains to be written about these mass-market publishers and the fiction they produced: for example, were these genres adapted and hybridised when written by Australian authors and published by Australian companies (as Wendy Griswold and

Misty Bastian show was the case when Nigerian authors began writing romance novels^{xviii})? Or should these publishers and this fiction be understood through a cultural imperialist framework (as is suggested by Cleveland's pretence of being an American company and Anthony May's description of Horwitz's output as 'American-style sensational fiction'^{xix})? And if a cultural imperialist interpretation is most appropriate, to what extent do these publishers displace the traditional colonial relationship – between Australian readers and writers and British publishers and authors – as the definitive or organising feature of Australian publishing until at least the 1960s?

Attention to these mass-market publishers also demonstrates the longstanding of certain marketing strategies considered entirely new to publishing. Dominant in accounts of the contemporary industry is the view that global media conglomerates have forced smaller publishers to adopt new, market-oriented strategies to remain competitive. These include, as Mark Davis summarises them, 'a shift in emphasis from backlist to frontlist titles', and 'marketing strategies that emphasise branding and market saturation', including 'increased emphasis on selling books to non-traditional outlets, such as discount and variety stores'.^{xx} The introduction of sales databases into Australian book publishing is seen as fundamental to this shift. As Davis writes, 'It was only with the availability of data from sources such as BookScan that publishers began to shift away from a top-down approach to managing culture to a bottom-up, consumer driven understanding of the market'.^{xxi} Rather than being new, such approaches were foundational strategies of companies like Cleveland and Horwitz. These publishers emphasised their frontlist, and sold titles mostly in newsagents.^{xxii} Branding and (as is evident from the proportion of Australian novel titles published by these companies) market saturation were also fundamental modes of operation. Even the availability of sales data, and the consumer-driven approach to the market that this enables, is not new. As May notes in his discussion of Horwitz's business strategies: 'Each month the returns figures provided by Gordon & Gotch enabled Horwitz to modify its future publishing in tune with the marketplace'.^{xxiii}

The fact that, in the mid-twentieth century, companies like Cleveland and Horwitz saturated the market with their titles and made publishing decisions based on sales data shows that these approaches pre-dated the arrival of multinational conglomerates. Moreover, the dominance of these mass-market publishers – in terms of the number of titles published – reveals such market-orientation was a dominant trend in Australian publishing in the 1950s and 1960s.^{xxiv} These findings challenge the view of publishing as newly commercialized – evident, for instance, in Frank Thompson's assertion that multinational corporations have ruined what was a 'gentlemanly'^{xxv} pursuit with a focus on sales. Yet it is also apparent that these mass-market publishers operated in what was effectively a separate economy from the mainstream book trade. In terms of the types of books published, the production values and sales outlets, and even the contracts offered to authors, there was a clear distinction in the 1950s and 1960s between mainstream and mass-market publishers that has all but disappeared in the contemporary industry.

When noted, the success of companies like Cleveland and Horwitz is ascribed to specific historical conditions – including the interruption to book imports into Australia produced by the Second World War^{xxvi} and tariffs on American pulp fiction from 1939 to 1959.^{xxvii} Other accounts refer to the prevalence of mid-twentieth century mass-market publishing in the context of its decline, due to the arrival of television.^{xxviii} The fate of

some Australian mass-market publishers suggests that these historical conditions were influential: Action Comics and Webster Publications – both in the top ten publishers of Australian novels in the 1950s – ceased operations in that decade. However, the continuing success of Cleveland and Horwitz challenges analyses that allow for the prosperity of these companies only under certain, limited historical circumstances. Cleveland and Horwitz remained the top two publishers of Australian novels in the 1970s, so dominant as to produce nearly half of that decade’s novel titles. In the 1980s, Torstar (owner of Harlequin/Mills & Boon, another mass-market publisher) took the top position, a shift which reflects the relative decline of westerns and war novels and the rise of romance fiction. But Horwitz and Cleveland remained in second and third place respectively, still publishing a very substantial 19.1 percent of Australian novels. Although they slipped from the top ten in the 1990s – to positions 12 (Cleveland) and 14 (Horwitz)^{xxxix} – only in the late 1980s did Horwitz cease publishing Australian novels. Cleveland published Australian novels (mainly westerns) until 2000.

Angus & Robertson is the only non-mass-market Australian publisher in the top ten publishers of Australian novels in the 1950s and 1960s, producing approximately 70 titles in the 1950s (3.65%) and 48 in the 1960s (1.81%). Given Angus & Robertson’s high profile in histories of Australian publishing it is not surprising that this company appears as one of the top ten publishers in these decades. But the small percentage of titles produced by the company – particularly compared to the mass-market publishers – contrasts sharply with descriptions of Angus & Robertson as ‘the major Australian publisher before and after the war’,^{xxx} ‘the most powerful force in Australian bookselling and publishing’,^{xxxii} and as ‘so dominant that it exercised virtual monopoly power’.^{xxxiii} Other Australian companies do appear in the top 20 publishers of Australian novel titles in the 1950s and 1960s,^{xxxiiii} but the average number of titles produced is small. Given descriptions of Australian publishing at this time as British-dominated, it is also unsurprising that most of the other top ten publishers of Australian novels in the 1950s and 1960s were British-based: namely, Collins, Robert Hale, Hutchinson & Co., Heinemann, and Hodder & Stoughton. Yet as with Angus & Robertson, the output of these British publishers pales in comparison to that of the Australian mass-market publishers.

‘National Awakening’^{xxxiv}: 1970s and 1980s

Beginning in the 1970s, the federal and state governments significantly expanded their support for Australian authors and publishers. State governments initiated a number of arts programs and literary awards,^{xxxv} while the Literature Board, established by the federal government in 1973, expanded and developed a previous program of ‘grants to individual writers’ and introduced ‘financial incentives to publishers for creative writing programs’.^{xxxvi} These incentives complemented the Book Bounty scheme, initiated in 1969, which subsidised the cost of printing books in Australia.^{xxxvii} The 1970s also witnessed the end of the import of British colonial editions to Australia and the *BTMA* – historical components of the international book trade that had maintained Australian publishers in a subordinate position in relation to their British and American counterparts.^{xxxviii} In combination with a series of social and cultural shifts,^{xxxix} these political and economic initiatives are widely seen to have fostered literary production,

and the development and expansion of the local publishing industry. According to Jim Hart:

If the 1960s were the infancy of modern Australian publishing, then the 1970s was surely its adolescence – a time of life characterised by rapid growth, increased maturity and an urge for independence, together with experimentation, recklessness, high ideals and overactive hormones.^{xi}

And if the 1970s were the industry's adolescence, the 1980s were a coming of age. As Anne Galligan asserts, 'for many commentators today, the 1980s represent the golden age of Australian publishing, with the opening out of opportunities to embrace the diversity of Australian society and engage in many new public conversations'.^{xlii}

This increased support for Australian literature and publishing produces no change in the number or names of the local companies in the top ten publishers of Australian novels in the 1970s: Cleveland, Horwitz and Angus & Robertson remain the only Australian companies in this list. But when the composition of the rest of the field is considered, the effects of this 'national awakening' are perceptible. Leaving aside the companies in the top ten, only six other Australian publishers in the 1950s, and four in the 1960s, produced five or more Australian novels.^{xliii} Thirty or so Australian companies (32 in the 1950s and 31 in the 1960s) published between one and four titles. Beginning in the 1970s, this 'tail' of Australian publishers of Australian novels both lengthened and expanded: in other words, there was noticeable growth in Australian publishers producing more than five Australian novels per decade, and in the number publishing between one and four titles. In the 1970s, the three Australian companies in the top ten are joined by ten others that produce more than five titles,^{xliiii} and a further 68 that produced between one and four novel titles.^{xliiv} By the 1980s, the two Australian companies in the top ten are tailed by 16 others that produce five or more Australian novels,^{xliv} and a further 168 that publish between one and four titles. Remarkably, the publishers responsible for five or more titles in the 1970s have disappeared from this category in the 1980s. With the exception of Hyland House and Hale & Iremonger, both of which began producing Australian novels in 1979, the companies responsible for five or more titles in the 1980s all began such publishing in that decade. While the significant growth in Australian publishers of Australian novels in the 1970s and 1980s lends support to claims of 'golden age', this changing of the guard implies a more complex and broken reality than that phrase implies.

In the 1980s, this expansion in Australian-based publishing of Australian novels begins to have an effect on the list of the top ten publishers – but in a different form to the publishing companies discussed to this point. At number seven in this decade is self-publishing and, at number eight, university presses. I have categorised novels as 'self-published' only when 'The Author' is listed as the publisher in *AustLit*, or the publisher is a small company established by the author to publish only that author's works; titles produced by subsidy- or vanity-presses, and individuals publishing other individuals' novels, are not listed as self-published. Cataloged individually, self-publishers would obviously not rank in the top ten publishers of Australian novels: most are responsible for only one or two titles. I have grouped them together to demonstrate the prevalence of this publishing trend. Self-publishers continue to appear in the top ten publishers of Australian novels in all subsequent decades, and achieve their highest proportion of total titles (5.31%) in the 1990s. The relatively high proportion of self-published works since

the 1980s shows that the ‘explosion’ of self-publishing, usually identified with the ‘end of the century’,^{xlvi} actually occurred earlier (indeed, self-publishers are the eleventh ranked publishers of Australian novel titles in the 1970s, producing more titles than the university presses, which are ranked thirteenth in that decade). The claim that self-publishing became popular in the late 1990s arises from the perception that it became increasingly difficult, from this time, for authors to attain publication through traditional avenues. If difficulty is the underlying cause of self-publishing, the earlier prevalence of this trend indicates that these difficulties preceded the 1990s.

Although self-publishing is frequently dismissed by scholars who take for granted that it is proof of lack of quality, it is a phenomenon deserving of attention, not only due to its prevalence, but for the challenge it poses to established ways of thinking about the relationship between market and literary value. High cultural forms are habitually distinguished from their low cultural others via supposed freedom from the market: a distinction is drawn, John Frow notes, ‘between works founded in freedom and internal necessity, on the one hand, and in unfreedom and external (economic) necessity on the other’.^{xlvii} The complicated place of self-publishing in relation to this dichotomy is evident in the contradictory ways in which the activity is criticised. On the one hand, the relative separation of self-publishing from commodity production and the publishing market makes it all the more noticeable how often this activity is explained (and explained away) as a product of naïve economic self-interest: these authors, it is routinely assumed, self-publish because they unwisely believe their novels will make them rich and famous. This association continues despite the fact that fame and fortune are rarely the outcome of self-publication. On the other hand, the assumption that self-published works are of dubious literary quality challenges the correlated association of escape from commodity culture with aesthetic value and literary achievement.

Like self-published authors, university presses would not rank in the top ten if listed individually.^{xlviii} However, as with self-publishers, I have grouped these presses together because they represent a particular type of publishing. Although their ranking has fluctuated (from position 13 in the 1970s, to 7 in the 1980s, to 10 in the 1990s and back to 7 in the 2000s), university presses have published an increasing proportion of Australian novels. But while the number of titles they publish has grown, it has remained a relatively small proportion of the Australian novel field. The remarkable contrast between the critical attention paid to university presses in histories of Australian publishing, and the proportion of titles produced by such presses highlights both the critical focus on literary fiction and the small proportion of the publishing industry treated by academic analyses. The differing attitude towards university presses and self-publishers reinforces the challenge that self-publishing poses to the division of market and literary value. While university presses are more implicated in the market than self-publishers, self-publishers are accused of economic self-interest where university presses are imbued with a degree of cultural capital that supposes freedom from the market. The appearance of these alternative forms of publishing in the top ten publishers of Australian novels from the 1970s is particularly noticeable in the context of a parallel trend: the entry and growth of multinational publishing conglomerates.

Multinational domination: 1990 –

Throughout accounts of contemporary Australian publishing, the 1990s and 2000s are identified as an era of trade deregulation, economic rationalism, and the resulting rise and ascendancy of multinational conglomerates.^{xlix} One of the most comprehensive of such analyses is Davis's account of how 'successive Australian governments have progressively "opened up" the Australian economy to international competition, ending industry assistance schemes, eliminating remaining tariffs and encouraging exports'. Davis identifies a series of decisions relating to this economic shift that particularly impacted the Australian publishing industry, including: 'changes to the copyright law to allow the parallel import of books from the United States in 1991, and the axing by the Howard government in 1996 of the Book Bounty ... [t]he introduction in 2000 of GST on all non-food retail products ... [producing] for the first time, a sales tax on books' and '[l]ow levels of government funding for literature'.^l Due to these changes, '[s]ince the mid-1990s the industry has globalised and consolidated to become an information-based business, beholden, in the case of nine out of ten of Australia's top companies, to global media giants'.^{li} In relation to Australian novel publishing, however, multinationals were present well before the 1990s.

If one were to be pedantic, one could argue that multinational publishers have had a presence in the Australian book industry since the nineteenth century, when British-based companies like Collins and Macmillan established branches in Australia. Based on the *OED* definition of multinational – 'Of a company or other organization: operating in several or many countries'^{lii} – the earlier presence of British publishers in Australia was multinational expansion. But these early multinationals differ in important ways from the conglomerates of contemporary publishing. Where these British-based companies opened branches in other countries, multinational conglomerates like News Corporation and Bertelsmann acquire other publishing companies (in fact, both Collins and Macmillan have now been subsumed in this way^{liii}). In particular, where these earlier multinationals were dedicated book publishers, today's conglomerates engage, as Galligan puts it, in 'publishing as part of the entertainment industry'.^{liv} This lack of specialism is seen to reflect an economic system where shareholder profits are privileged to the detriment of literary, and especially local literary, production.

Multinational conglomerates began appearing in the top ten publishers of Australian novels in the 1970s, with Torstar's acquisition of Harlequin/Mills & Boon, and the entry into the Australian market of Thomson, a Canadian-based media conglomerate with interests in publishing, travel, and natural resources.^{lv} The presence and impact of these conglomerates increased in the 1980s: Torstar published the most Australian novel titles of any publisher; Pearson and News Corporation (the latter via the acquisition of Angus & Robertson) also entered the top ten in this decade. Including all multinational conglomerates involved in publishing Australian novels, from the 1970s to the 1980s the proportion of titles produced by these companies increased from 10 percent to 30.5 percent.^{lvi}

While multinational conglomerates entered the Australian novel market earlier than is commonly acknowledged, it is the case that this trend was consolidated, as Davis and others suggest, in the 1990s and 2000s. With the exception of self-publishing and university presses, and of Allen & Unwin in the 2000s, the top ten publishers of Australian novel titles in the 1990s and 2000s are all either multinational conglomerates (Torstar, Pearson, News Corporation, Bertelsmann, Reed Elsevier and Hachette Livre) or

companies that were soon to be subsumed into multinational conglomerates (Pan Macmillan, Random House, Hodder Headline and Lothian). From 30.5 percent in the 1980s, the proportion of Australian novels published by conglomerates (including those not in the top ten) increased to 38.7 percent in the 1990s and 43.2 percent in the 2000s.^{lvii}

Viewed in this way – as a progressive domination of Australian novel publishing – this trend presents an apparently bleak outlook for local publishers. But this conclusion is complicated by a closer analysis of the activities of these conglomerates. For although they are commonly viewed as an homogenous group, they enter, operate in, and in some cases depart from Australian novel publishing in notably different ways. Some have not expanded their publication of Australian novels in the 1990s and 2000s – as might be expected based on the trend of overall growth – but have reduced their lists or vacated this part of the industry altogether. Simon & Schuster and Scholastic entered the market virtually cold – that is, not by acquiring companies with a significant previous involvement in publishing Australian novels – and after producing such titles for a few years, more or less abandoned the field.^{lviii} Other corporations began producing Australian novels when they acquired a company or companies with a previous involvement in such publishing. But their subsequent manner of vacating, or reducing their involvement in, this part of the industry has differed. Reed Elsevier and, in particular, Torstar, greatly increased production of Australian novels before reducing their lists from the mid-1990s.^{lix} In contrast, Hachette Livre acquired a number of companies with significant involvement in publishing Australian novels – most particularly, Hodder Headline and the Australian publisher Lothian – only to reduce such publishing almost instantly. Other conglomerates have maintained or increased their production of Australian novels. After acquiring companies with an involvement in Australian novel publishing, Bertelsmann and Holtzbrinck published slightly fewer, but still a relatively stable number of Australian novels. Pearson and News Corporation have gone on to publish more Australian novels than the combined output of the companies they acquired in entering the market.

Many of these conglomerates, then, do not conform with the two approaches to publishing commonly ascribed to multinationals: that is, the grab and smash (à la Hachette Livre), or the unstoppable incursion (as may turn out to be the case with Pearson and News Corporation). It is not that these multinational corporations can be stopped – they may elect to stop. And although a departure of all multinationals from Australian novel publishing would undoubtedly make business easier for local (and small and medium sized overseas) publishers, it would not necessarily be positive for Australian authors. Torstar, for example, has enabled Australian romance novelists to attain international popularity and sales. In terms of Hachette Livre, the elimination of a venerable Australian publishing company like Lothian is regrettable, but this absence also opens up market space for smaller Australian publishers of Australian novels.

This brings us to the more than 50 percent of Australian novels not published by multinational conglomerates. While accounts of contemporary publishing stress the industry's increasing concentration – Michael Wilding asserts, 'sinister things are happening. More and more of the organs of communication are falling into fewer hands'^{lx} – in fact, Australian novel publishing today is far less concentrated than in the 1960s. The proportion of Australian novel titles produced by the top five ranked publishers has decreased from 70.2 percent in the 1960s to 62.7 percent in the 1970s, 43.6 percent in the

1980s, 39.7 percent in the 1990s, and 38.3 percent in the 2000s, despite the fact that, in this latter decade, the top five publishers were all multinational conglomerates. This decreasing concentration occurs not only because these multinational publishers produce fewer Australian novels than did companies like Cleveland and Horwitz, but because of the growing number of independent small and medium sized Australian companies publishing such fiction. The trend of the 1970s and 1980s, of an expanding ‘tail’ of Australian publishers of Australian novels, has continued in the 1990s and 2000s. The 18 Australian publishers that produced five or more Australian novel titles in the 1980s has increased to 34 in the 1990s; and the 168 local companies that produced between one and four titles in the 1980s has expanded to 322 in the 1990s. Between 2000 and 2007, 33 Australian publishers produced more than five Australian novels and 250 published between one and four titles. While this multiplication of small and medium sized Australian publishers could connote instability or stress in the system, it also indicates a healthy diversity, and the appeal of Australian novel publishing.

Among the trends discernible in the 1990s and 2000s is an expected growth in Australian companies either wholly or partially funded through subsidy-publishing.^{lxi} In the 2000s, a handful of Australian companies engaged in electronic and/or print-on-demand publishing entered the top 50 publishers of Australian novels.^{lxii} But the more pronounced trend in the top 50 category is growth in Australian publishers of literary fiction. This group is comprised of a variety of publishers: some have been producing Australian novels since the late 1970s and 1980s, while others began in the 1990s and 2000s; the group includes relatively large, established presses like Allen & Unwin, ABC Books, Hale and Iremonger and Fremantle Press; political or identity-based publishing houses like The Vulgar Press, Papyrus Press, Pasco Publishing and Spinifex Press, as well as publishers with more explicitly literary aims, like Text Publishing, Ginninderra Press, Giramondo Publishing and Brandl and Schlesinger.^{lxiii} Considered in conjunction with the continuing prominence of self-publishing and university presses, Australian-based publishing of Australian novels appears to be diversifying rather than dying. Importantly, this growth contradicts the common assumption that the rise of multinational conglomerates supplanted and ended the national expansion of Australian publishing. Instead, at least in relation to the Australian novel, these two trends occur in concert through the 1990s and 2000s (and indeed, through the 1970s and 1980s).

In histories of Australian publishing, the 1950s and 1960s are seen as British-dominated, the 1970s and 1980s as a ‘golden age’ of government support and Australian publishing, and the 1990s and 2000s as the era of economic rationalism and the rise and domination of multinational conglomerates. Analysing the publishers of Australian novels contradicts the generalisability of this history. In the 1950s and 1960s, Australian novel publishing was dominated not by British companies (although these were certainly present) but by a handful of Australian mass-market publishers, who produced popular fiction and sold it using marketing techniques commonly identified as new to the publishing industry of the 1990s and 2000s. These mass-market companies continued to publish a significant proportion of Australian novels in the 1970s and 1980s, decades that also witnessed the beginning of growth in a more diverse range of Australian publishers of Australian novels, and the initial entry of multinational conglomerates into this industry. While the growth of multinational corporations in the 1990s and 2000s is commonly seen as ending the era of national/ist publishing, in relation to Australian

novels, these trends are concurrent (and have occurred in concert with the gradual decline of Australian mass-market publishing). Today, Australian novels are published by a significantly larger, less concentrated and more varied group of publishers than was the case in the 1950s and 1960s.

As always, the future is uncertain. But I would like to side with the optimists, and against those who foretell the imminent death of Australian publishing (and with it, the Australian novel) at the hands of multinational conglomerates. Current global economic conditions (as I write in March 2009) suggest the possible future contraction, rather than expansion, of these conglomerates. For instance, in February 2009, News Corporation (one of the major conglomerates involved in publishing Australian novels) reported enormous losses, necessitating ‘record massive write-downs on its assets ... aggressive cost-cutting and layoffs’.^{lxiv} According to Simone Murray, multinational conglomerates have continued book publishing in the past not because it is profitable in and of itself – ‘Even with the introduction of managerial expertise and savage cost-cutting, the multinationals could not raise book publishing’s profitability to the general region of the television and film subsidiaries’^{lxv} – but in order to establish copyright that could be streamed into other, more profitable, media forms.^{lxvi} In these straitened times, these corporations may be forced to concentrate on immediate rather than potential ways of making a profit. Even if they do not, Kevin Rudd’s recent proclamation that ‘the great neo-liberal experiment of the past 30 years has failed’^{lxvii} – although almost certainly overly optimistic – holds out the possibility of a return to a ‘golden age’ of governmental support for Australian publishing and literature. Of course, economic conditions obviously affect small and medium sized Australian and overseas publishers as well as multinationals. However, the continual growth in Australian publishers in the last 50 years – and the difficult economic circumstances under which much of this growth has occurred – suggests that the local industry has both the will and capacity to take advantage of the current economic conditions.

Appendix

1950s

	Publisher	#	%
1.	Horwitz	411	21.42
2.	Cleveland	393	20.48
3.	Action Comics	180	9.38
4.	Calvert	116	6.05
5.	Collins	82	4.27
6.	Angus & Robertson	70	3.65
7.	Robert Hale	47	2.45
8.	Hutchinson	44	2.30
9.	Webster	41	2.14
10.	Heinemann	27	1.41

1970s

	Publisher	#	%
1.	Horwitz	536	26.99
2.	Cleveland	405	20.39
3.	Torstar	146	7.35
4.	Robert Hale	86	4.33
5.	Times Mirror	72	3.63
6.	Macmillan	58	2.92
7.	Angus & Robertson	57	2.87
8.	Collins	53	2.67
9.	Thomson	30	1.51
10.	Thomas Tilling	26	1.31

1990s

	Publisher	#	%
1.	Torstar	358	10.44
2.	Pearson	312	9.10
3.	Pan Macmillan	277	8.08
4.	News Corporation	233	6.79
5.	Self-Published	182	5.31
6.	Reed Elsevier	140	4.08
7.	Random House	136	3.97
8.	Bertelsmann	124	3.62
9.	Hodder Headline	120	3.50
10.	University Presses	118	3.44

1960s

	Publisher	#	%
1.	Cleveland	987	37.11
2.	Horwitz	630	23.68
3.	Robert Hale	89	3.35
4.	Collins	83	3.12
5.	Calvert	78	2.93
6.	Thomas Tilling	61	2.29
7.	Harlequin/Mills & Boon	53	1.99
8.	Angus & Robertson	48	1.81
9.	Times Mirror	47	1.77
10.	Hodder & Stoughton	39	1.47

1980s

	Publisher	#	%
1.	Torstar	281	13.57
2.	Horwitz	244	11.78
3.	Cleveland	151	7.29
4.	Pearson	140	6.76
5.	News Corporation	87	4.20
6.	Robert Hale	72	3.48
7.	Self-Published	64	3.09
8.	University Presses	49	2.37
9.	Collins	44	2.12
10.	Macmillan	37	1.79

2000s

	Publisher	#	%
1.	News Corporation	284	9.58
2.	Pearson	245	8.27
3.	Holtzbrinck	228	7.69
4.	Bertelsmann	199	6.72
5.	Torstar	178	6.01
6.	Allen & Unwin	164	5.53
7.	University Presses	116	3.91
8.	Self-Published	110	3.71
9.	Hachette	86	2.90
10.	Lothian	79	2.67

ⁱ David Carter and Anne Galligan, eds. *Making Books: Contemporary Australian Publishing* (St Lucia: University of Queensland Press, 2007) and Craig Munro and Robyn Sheahan-Bright, eds. *Paper Empires: A History of the Book in Australia, 1946-2005* (St Lucia: University of Queensland Press, 2006).

ⁱⁱ Elizabeth Webby, 'Australian Literature and the Marketplace,' in Alison Bartlett, Robert Dixon and Christopher Lee, eds., *Australian Literature and the Public Sphere: Refereed Proceedings of the 1998 ASAL Conference* (Toowoomba: Association for the Study of Australian Literature, 1999): p. 16.

ⁱⁱⁱ Brigid Magner, 'Anglo-Australian Relations in the Book Trade,' in Munro and Sheahan-Bright, eds., *Paper Empires*, p. 9.

^{iv} *AustLit*. The Australian Literary Resource website <<http://www.austlit.edu.au>> 2002-. I collected the data for this study from *AustLit* in July 2008. My dataset includes all publications categorised by *AustLit* as novels, except those works designated 'Non-*AustLit* Novels' and the non-Australian titles included in *AustLit*'s 'Banned Novels' subset. As with any dataset, the results of this study are approximate. *AustLit* probably does not contain every Australian novel published from 1950 to 2007 and, as *AustLit* is regularly updated, the results I present may not be identical to current database records. Nevertheless, the dataset I have collected is certainly large enough and full enough to render the impact of small omissions and errors statistically negligible, and the random nature of errors and omissions in *AustLit* means broad trends will remain constant regardless of minor changes. The viability of this study is further supported by the relative completeness of records on Australian novels (compared to other fictional forms in *AustLit*).

^v In interpreting these results it is vital to note that the companies listed in the Appendix often published under a number of imprints. For example, the results for Horwitz includes novels produced by Transport Publishing Co., Stag, Scripts, Gold Star, Horwitz Grahame and, from 1965, Ure Smith.

^{vi} Benedict Anderson, *Imagined Communities: Reflections on the Origin and Spread of Nationalism* (London: Verso, 1983).

^{vii} As Carter notes, 'Against the general elevation of poetry, Palmer's commitment to the novel was symptomatic of the modern form of nationalism and was shared with a generation of literary nationalists who emerged in the 1930s.' See David Carter, 'Critics, Writers, Intellectuals: Australian Literature and its Criticism,' in Elizabeth Webby, ed., *The Cambridge Companion to Australian Literature* (Cambridge: Cambridge University Press, 2000), p. 267.

^{viii} See for example Michal Wilding, 'Michael Wilding on Australian Publishing in a Global Environment', *Antipodes* 14 (2000): pp. 152-54; David Myers, 'Getting Published in Australia,' *Quadrant* (December 2004): p. 66-67; Nathan Hollier, 'Between Denial and Despair: Understanding the Decline of Literary Publishing,' *Southern Review* 40.1 (2007): p. 62-77.

^{ix} Craig Munro and John Curtain, 'After the War,' in Munro and Sheahan-Bright, eds., *Paper Empires*, p. 3.

^x Other Australian companies in this top ten list include the mass-market publisher Webster Publications (at number nine in the 1950s) and Angus & Robertson (at number eight in the 1960s).

^{xi} See Elizabeth Webby, 'Colonial Writers and Readers,' in Elizabeth Webby, ed. *The Cambridge Companion to Australian Literature* (Cambridge: Cambridge University Press, 2000): p. 54; Munro and Curtain, 'After the War,' pp. 3-5; and Richard Nile, *The Making of the Australian Literary Imagination* (St Lucia: University of Queensland Press, 2002), p. 27.

^{xii} John Curtain, 'How Australian Publishing Won its Way Against the Odds,' *Logos* 9.3 (1998): 143.

^{xiii} These findings affirm Munro's observation that 'the fledgling postwar publishing industry ... was once almost exclusively Australian owned and controlled'. However, as regards novel publishing, control was not in the hands of the companies he nominates: namely, Angus & Robertson, Ure Smith and Cheshire. Munro, '2001 Publishing Report Card,' in Munro and Sheahan-Bright, *Paper Empires*, p. 86.

^{xiv} Anthony May and Frank Thompson argue that Horwitz 'dominated' (May) and 'was the local leader in' (Thompson) mass-market publishing. May, 'Horwitz,' in Munro and Sheahan-Bright, eds., *Paper Empires*, p. 50; Thompson, 'Sixties Larrikins,' in Munro and Sheahan-Bright, *Paper Empires*, p. 31.

^{xv} There are exceptions to this general oversight, including Toni Johnson-Wood's work on Australian pulp fiction. See Toni Johnson-Woods, 'The Mysterious Case of Carter Brown: or, Who Really Killed the Australian Author?' *Australian Literary Studies* 21.4 (2004): 74-88; Toni Johnson-Woods, "'Pulp" Fiction Industry in Australia 1949-1959,' *Antipodes* (June 2006): 63-67. Jason Ensor has also noted that 'Cleveland and Horwitz produced the greatest output of novels from 1954 to 1971 (respectively 1424 and 770 novels each), establishing them as undeniably the most prolific Australian publishers for the period'. It seems, however, that Ensor has not included imprints of Horwitz in this count, and thus under-states the output of this company. See Jason Ensor, 'Reprints, International Markets and Local Literary Taste: New Empiricism and Australian Literature', *JASAL. Special Issue: The Colonial Present* (2008): 202.

^{xvi} This interpretation is reinforced by the fact that Horwitz – the only one of these companies whose publishing activities (though not their extent) have been recognised – was involved in educational as well as mass-market publishing (Thompson, *Ibid*, p. 31).

^{xvii} Magner, 'Anglo-Australian Relations,' p. 8.

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- ^{xviii} Rather than the traditional romance narrative – where a man and a woman fall in love – these Nigerian romances often included a number of men for each woman and/or a refusal of happy endings. Wendy Griswold and Misty Bastian, ‘Continuities and Reconstructions in Cross-Cultural Literary Transmission,’ *Poetics* 16 (1987): 327-51.
- ^{xix} May, ‘Horwitz,’ p. 50.
- ^{xx} Mark Davis, ‘The Decline of the Literary Paradigm in Australian Publishing,’ in Carter and Galligan, eds., *Making Books*, p. 123.
- ^{xxi} *Ibid.*, pp. 125-6.
- ^{xxii} May, ‘Horwitz,’ p. 52.
- ^{xxiii} *Ibid.*
- ^{xxiv} I am not suggesting that, because they are longstanding, such strategies are productive ones in ‘literary’ terms, however we might define them. As many critics have argued, it is not unproblematic that a market orientation challenges the commercial viability of slower-selling literary titles that contribute in important ways to national and international culture.
- ^{xxv} Thompson, ‘Sixties Larrikins,’ p. 31.
- ^{xxvi} Munro and Sheahan-Bright, ‘After the War,’ p. 4.
- ^{xxvii} Johnson-Woods, ‘The Mysterious Case of Carter Brown,’ p. 74.
- ^{xxviii} May, ‘Horwitz,’ p. 52; Tim Dolin, ‘The Secret Reading Life of Us,’ in Brian Matthews, ed. *Readers, Writers, Publishers: Essays and Poems* (Canberra: Australian Academy of the Humanities, 2004): p. 115.
- ^{xxix} In the 1990s Cleveland and Horwitz published 3.35% of Australian novel titles. Horwitz shared the fourteenth ranking in this decade with Fremantle Arts Centre Press (later Fremantle Press).
- ^{xxx} George Ferguson with Neil James, ‘Flagship Angus & Robertson,’ in Munro and Sheahan-Bright, eds., *Paper Empires*, p. 11.
- ^{xxxi} Munro, ‘A&R’s Takeover Crisis,’ in Munro and Sheahan-Bright, eds., *Paper Empires*, p. 13.
- ^{xxxii} Mark Davis, ‘Literature, Small Publishers and the Market in Culture,’ *Overland* 190 (Autumn 2008): 6.
- ^{xxxiii} These Australian publishers include, in the 1950s, Currawong (number 12), Dymocks (number 18) and the Australasian Book Society (ABS) and Frank Johnson (equal number 19), and in the 1960s, Rigby (number 14) and ABS (number 16). Australian Consolidated Press (ACP) shares the sixteenth position with ABS in the 1960s, but given its international holdings, this company can more appropriately be considered multinational.
- ^{xxxiv} Munro and Curtain, ‘After the War,’ p. 6.
- ^{xxxv} Ken Gelder and Paul Salzman, *The New Diversity: Australian Fiction 1970-88* (Melbourne: McPhee Gribble, 1989): p. 4.
- ^{xxxvi} *Ibid.*, 2.
- ^{xxxvii} Craig Munro, ‘Editing, Design and Production,’ in Munro and Sheahan-Bright, eds., *Paper Empires*, p. 176.
- ^{xxxviii} British colonial editions ceased being exported to Australia in 1972 (Magner, ‘Anglo-Australian Relations,’ p. 7). Shortly after this, a court decision in the United States ended the *BTMA* by allowing Australian publishers ‘access to rights for local editions of many US-originated books that had previously been locked into agreements with British publishers’ (Jim Hart, ‘New Wave Seventies,’ in Munro and Sheahan-Bright, eds., *Paper Empires*, p. 55).
- ^{xxxix} These include increased funding for Australian universities and the consolidation and teaching of Australian literature in schools and universities; an ‘easing of censorship restrictions’ (Kerryn Goldsworthy, ‘Fiction from 1900 to 1970,’ in Webby, ed., *The Cambridge Companion*, p. 131); and ‘escalating population, greater social and political complexity, widening economic structures and marked cultural diversity’ (Delys Bird, ‘New Narrations: Contemporary Fiction,’ in Webby, ed., *The Cambridge Companion*, p. 183).
- ^{xl} Hart, ‘New Wave Seventies,’ p. 53.
- ^{xli} Galligan, ‘The Culture of the Publishing House,’ p. 43.
- ^{xlii} These companies are: Currawong, Invincible Press, Dymocks, ABS, Frank Johnson and Ure Smith in the 1950s; and Rigby, ABS, Cheshire and Ure Smith in the 1960s. I am not including self-publishers in this or any similar counts as they are not companies.
- ^{xliii} Six of these companies (Wentworth Press, Alpha Press, Wren Books, Wild & Woolley, Outback Press and Spectrum) began publishing such novels in the late 1960s or early 1970s, while the others (Calvert, Georgian House and ABS) began such publishing in the 1950s or, in the case of Rigby, in 1960. I am not

including university presses in this or any similar counts because this category is composed of a number of different publishers rather than a single company.

^{xliv} This result affirms, in relation to the production of Australian novels, Galligan's description of the publishing industry as a whole in 1970s as characterised by the emergence of a number of small independent publishers. Galligan, 'The Culture of the Publishing House', p. 43.

^{xlv} These companies are: Hale & Iremonger, Hyland House, Fremantle Arts Centre Press, Pascoe Publishing, Boolarong Press, Dykebooks, Greenhouse Publications, Access Press, Animo Publishing, Cory & Collins, Rastar, Artlook Books, Aurora Press, Hudson Publishing, John Ferguson and Wobutoft Books. The number rises to 17 Australian publishers if the co-publishing agreement between McPhee Gribble and Penguin is included.

^{xlvi} Michael Webster, 'Into the Global Era,' in Munro and Sheahan-Bright, eds., *Paper Empires*, p. 82.

^{xlvii} John Frow, *Cultural Studies and Cultural Value* (Oxford: Clarendon Press, 1995): pp. 17-18. As Frow notes, this 'binary logic is from the beginning undermined by the absorption of both 'high' and 'low' culture into commodity production' (Ibid, p. 17).

^{xlviii} Oxford University Press is the only university press I have excluded from this category. I have done so due to the press's multinational profile. Only two of the university presses I have included in this category are not Australian: The University of the South Pacific published one Australian novel title in the 2000s, and the Institute of Papua New Guinea Studies published six titles in the 1970s and one in the 1980s. Unsurprisingly, The University of Queensland Press (UQP) is responsible for a significant majority of the titles in this category. UQP published ten of 17 Australian novel titles produced by university presses (excluding OUP) in the 1970s (representing 58.8% of university press novel publications); 44 of 49 titles in the 1980s (89.8%); 95 of 118 titles in the 1990s (80.5%); and 75 of 116 titles published up to 2007 (64.7%).

^{xlix} For example, David Carter and Anne Galligan, 'Introduction,' in Carter and Galligan, *Making Books*, p. 6; Munro, '2001 Publishing Report Card,' p. 87;

ⁱ Davis, 'The Decline of the Literary Paradigm in Australian Publishing,' p. 121.

ⁱⁱ Ibid, p. 119.

ⁱⁱⁱ 'multinational, adj.' OED Online. Oxford University Press (June 2008), online, <http://dictionary.oed.com/cgi/entry/00318191?single=1&query_type=word&queryword=multinational&first=1&max_to_show=10>, accessed 5 March 2009>, accessed 23 February 2009.

ⁱⁱⁱⁱ In 1989 News Corporation acquired Collins and, in 1999, Holtzbrink acquired Macmillan.

^{lv} Galligan, 'The Culture of the Publishing House,' p. 44.

^{lvi} Thomson Organization, 'Company Research Guide,' online (2009), <<http://www.123exp-orgs.com/t/00514212362/>>, accessed 4 March 2009.

^{lvii} The multinational conglomerates I have counted in these decades are: 1970s – ACP, Bertelsmann, Granada, James Hardie Ltd., Pearson, Reed Elsevier, Thomson Organization, Time Warner and Torstar; 1980s – ACP, Bertelsmann, Fairfax, Granada, Hearst Corporation, James Hardie Ltd., News Corporation, Pearson, Reed Elsevier, Thomson Organization, Time Warner and Torstar. Other companies that are dedicated publishers rather than conglomerates could also have been included in this count due to their size and multinational holdings. For the 1970s and 1980s, these companies include Collins, Hodder & Stoughton, Macmillan, Pan Macmillan, Random House and Simon & Schuster. By this broader definition, however, multinationals have been operating in Australia since the nineteenth century. Including these companies increases the percentage of Australian novel titles published by multinational companies to 16.8% (rather than 10%) in the 1970s and to 37.4% (rather than 30.5%) in the 1980s.

^{lviii} The multinational conglomerates I have counted for these decades are: 1990s – ACP, Bertelsmann, Fairfax, Hachette Livre, Hearst Corporation, Holtzbrinck, News Corporation, Pearson, Reed Elsevier, Scholastic, Time Warner and Torstar; 2000s – Bertelsmann, Fairfax, Gale Group, Hachette Livre, Holtzbrinck, News Corporation, Pearson, Reed Elsevier, Scholastic, Time Warner and Torstar. As above, other companies that are not conglomerates but dedicated publishers could have been included in this count due to their size and multinational holdings. For the 1990s and 2000s these companies include Hodder Headline, Hodder & Stoughton, Pan Macmillan, Random House and Simon & Schuster. Including these companies significantly increases the percentage of Australian novel titles published by multinationals in the 1990s to 55.1% (instead of 38.7%), and slightly increases the percentage of titles published by multinationals in the 2000s to 47.3% (rather than 43.2%).

^{lviii} Scholastic produced most of its Australian novel titles in the mid-1990s and Simon & Schuster, in the early 2000s. In the last few years, both companies appear to be re-growing their Australian novel lists, but such growth has not continued for long enough to constitute a trend.

^{lix} George Paizis describes an overall decline in Torstar's 'sales ... both in the main markets – USA and Europe – and elsewhere' since the mid-1980s. George Paizis, 'Category Romance in the Era of Globalization: The Story of Harlequin,' in Anna Guttman, Michel Hockx and George Paizis, eds., *The Global Literary Field* (Cambridge: Cambridge Scholars Press, 2006): p. 128. The reduction in Australian novels published by this company has occurred in the context of an overall decline in the Torstar's sales and market share. Interestingly, Paizis describes Torstar as both the product and the victim of globalisation: 'its thirty-five per cent share of world mass-paperback sales forced it to seek ever new markets: expansion into new areas is the only means of survival because a competitor will rush to fill a vacuum if and when prospects allow' (Ibid, p. 131).

^{lx} Michael Wilding, 'Australian Literary and Scholarly Publishing in its International Context,' *Australian Literary Studies* 19.1 (1999): 57. Myers, 'Getting Published in Australia,' p. 66; Hollier, 'Between Denial and Despair,' p. 62.

^{lxi} Specifically regarding those companies in the top 50 publishers of Australian novel titles, the main Australian subsidy publishers of the 1990s were Seaview Press (number 23), Boolarong Press (number 30) and Wild & Woolley (number 45). Boolarong Press did not publish any Australian novel titles in the 2000s, but Seaview (number 20) and Wild & Woolley (number 36) were joined by a number of other such companies, including Sid Harta Publishers (number 15), and Black Pepper, Brolga Publishing and Peacock Publications (equally ranked number 39).

^{lxii} These companies include Jacobyte Books (number 19), Interactive Press (number 31), Equilibrium Books (number 35) and DreamCraft (number 48). The most prolific of these electronic publishers – Jacobyte Books – was acquired by the American e-publishing company BeWrite Books in 2005.

^{lxiii} Other Australian companies in the top 50 publishers of Australian novel titles in the 1990s and 2000s include Duffy & Snellgrove, Indra Publishing, Scribe and Australian Scholarly Publishing.

^{lxiv} Melinda Peer, 'Bad News For News Corp,' *Forbes.com* (5 February 2009), online <http://www.forbes.com/2009/02/05/news-corp-earnings-markets-equity-0205_advertising_52.html>, accessed 4 March 2009.

^{lxv} Simone Murray, 'Generating Content: Book publishing as a component media industry,' in Carter and Galligan, eds., *Making Books*, p. 62.

^{lxvi} Ibid, pp. 63-64.

^{lxvii} Kevin Rudd, 'The Global Financial Crisis,' *The Monthly* (February 2009): 25.