

# Turnover/output of publishing in France

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# Structure of the presentation

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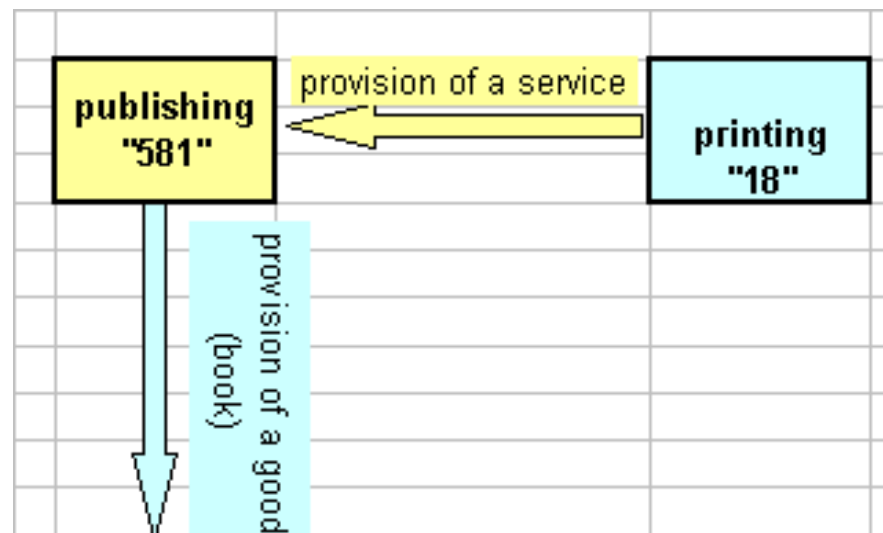
- ❑ **Classification**
- ❑ **Market size characteristics**
- ❑ **Measure of turnover**
  - Pricing unit of measure
  - Price determining characteristics
  - NA and prices for NA
  - Current aggregation trees
  - Pricing methods
  - Quality adjustment
  - Dissemination

# Classification: the change since previous ISIC, between goods and services

Printing and publishing are now dissociated:

ISIC Rev 3			ISIC Rev 4
publishing and printing "22"	publishing "221"	→	publishing "581"
	printing "222"	→	printing "18"
Database activities and online distribution of electronic content ISIC "7740"		→	publishing "581"
industrial activity			
service activity			

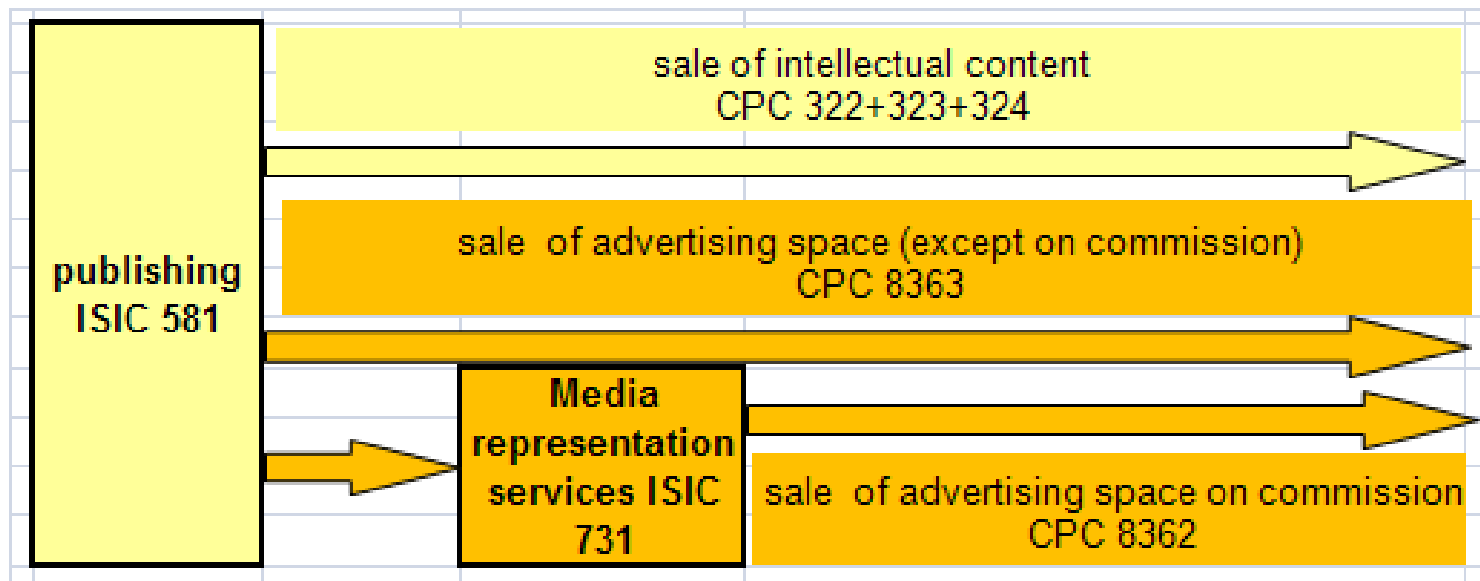
The paradox is that industry produces service and service produces goods:



Problems for collecting prices in activity 18, export and import prices of books or of printing services

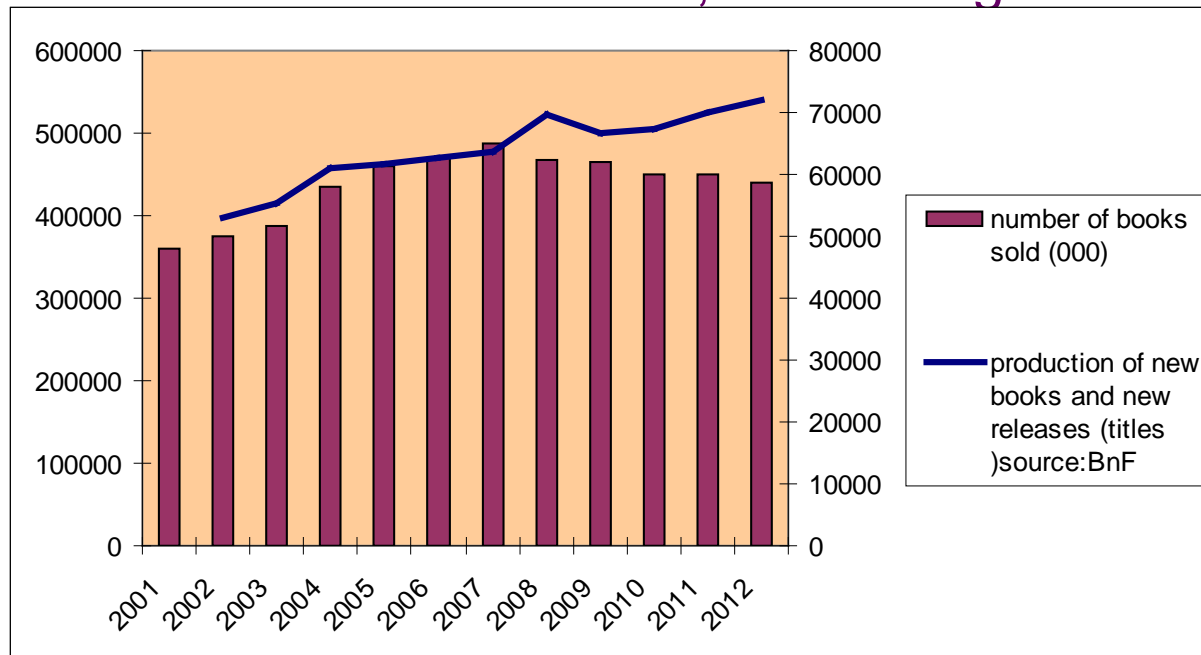
# Classification: link with advertising

In old, old days, French NA identified a transfer from activity publishing to product advertising (similarly for broadcasting). In any case, this link introduces an heterogeneity in publishing products:



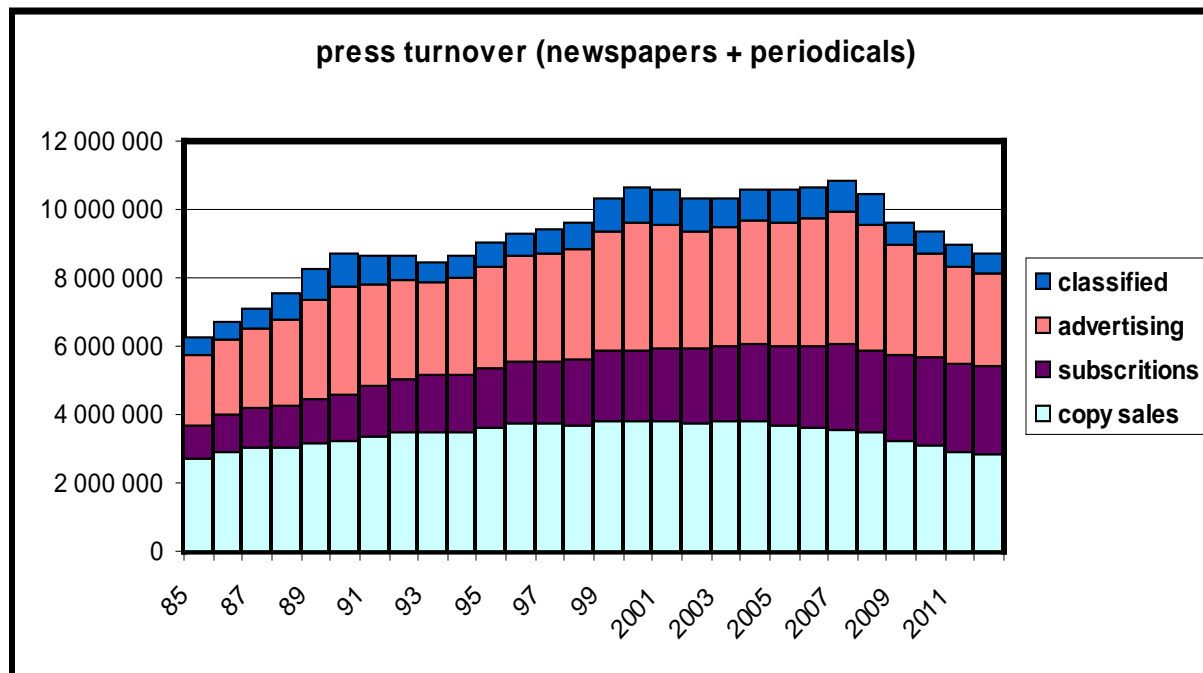
# Market characteristics for books

- From 1981 (Lang act), the price of a book is unique.
- Bookshops sells 30% of books
- Retailers are obliged to buy the books, but the publishers are obliged to buy back the unsold books (24% of books)
- The number of books sold has reached a summit in 2007)
- The number of new titles increases, the average sales decrease

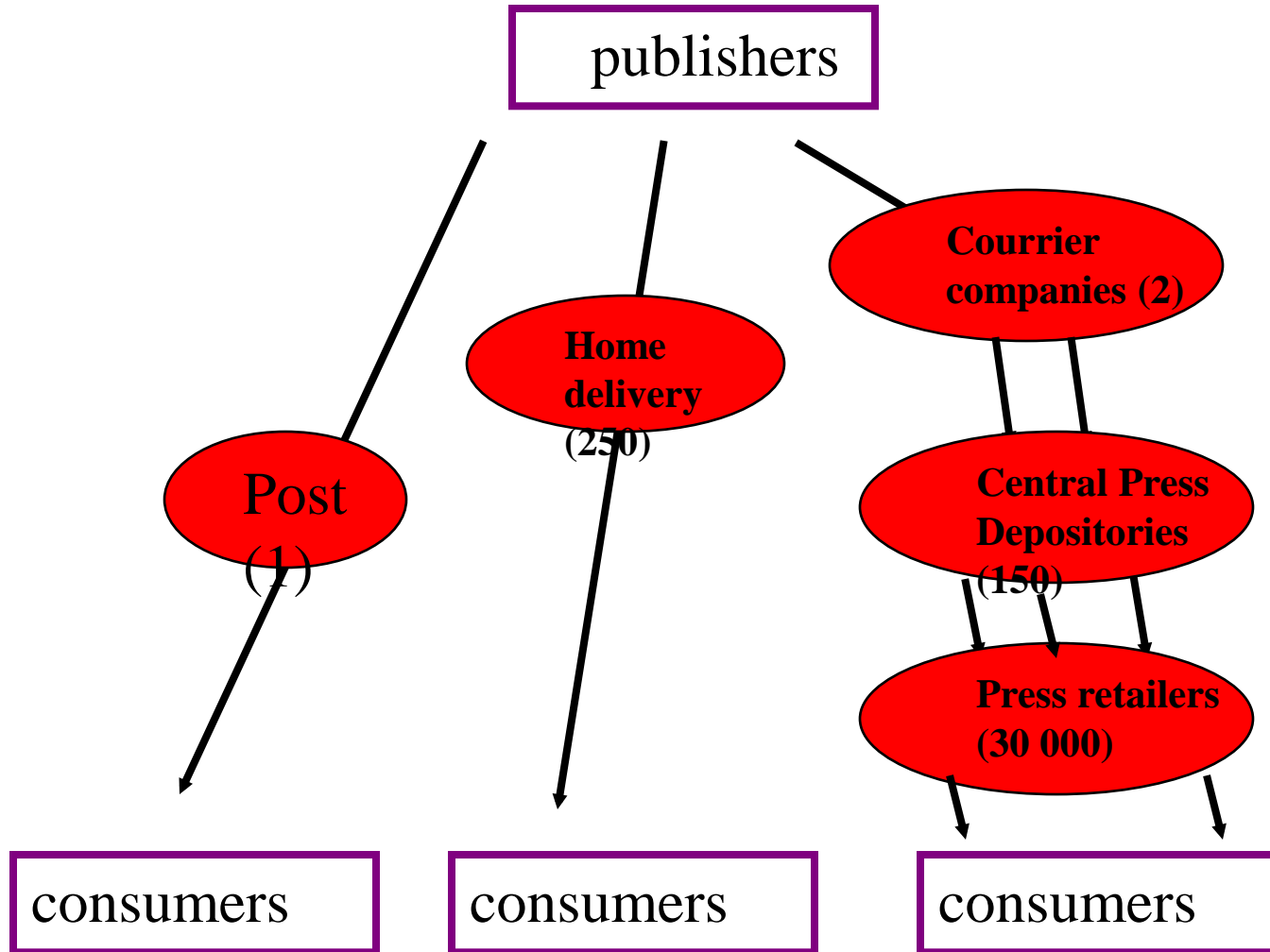


# Market characteristics for press

- More and more on-line contents, but how to earn money?
- Advertising revenues decreases
- The end of classified ads because of the web
- Sharp decline of copy sales at retail trade (especially at kiosks)



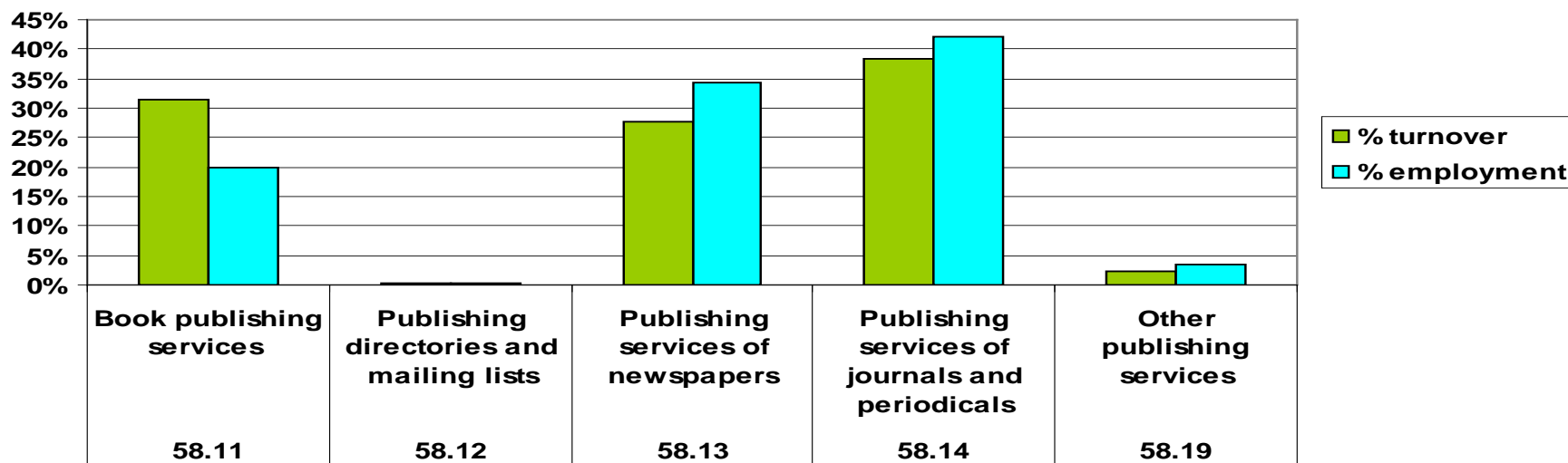
# The system of press delivery



# Market size

## ■ 58.1 Publishing services of books, periodicals and other publishing services

employment band	% companies	% salaries	% turnover
0-9	92%	15%	12%
10-19'	3%	6%	5%
20-249'	4%	36%	34%
250+	1%	43%	49%
<b>TOTAL</b>	<b>9 318</b>	<b>67 969</b>	<b>17 701</b>





# Three industries nearly equivalent in size

## 58.11: books

"NAF7"	turnover (k€)	%	service definition
5811Z10	4 575 547	96	Publishing of all types of books, printed or on any other physical media (disk, tape ...)
5811Z20	57 973	1	Book publishing online
5811Z30	25 012	1	Advertising space in books (printed or electronic)
5811Z40	21 284	0	Publishing of books on a fee or contract basis
5811Z50	89 592	2	Licensing services for books
<b>5811</b>	<b>4 769 407</b>	<b>100</b>	

## 58.13: newspapers

"NAF7"	turnover (k€)	%	service definition
5813Z00	401	0	Publishing of newspapers
5813Z10	2 883 970	61	Publishing of printed newspapers
5813Z20	161 023	3	Publishing of newspapers online
5813Z30	1 668 904	35	Advertising space in newspapers (printed or electronic)
<b>5813</b>	<b>4 714 297</b>	<b>100</b>	

## 58.14: periodicals

"NAF7"	turnover (k€)	%	service definition
5814Z00	164 451	3	Publishing of journals and periodicals
5814Z10	3 940 326	64	Publishing of printed journals and periodicals
5814Z20	275 835	5	Publishing of journals and periodicals online.
5814Z30	1 678 426	27	Advertising space in journals and periodicals (printed or electronic)
5814Z40	55 217	1	Licensing services for journals and periodicals
<b>5814</b>	<b>6 114 254</b>	<b>100</b>	

# Structure of turnover for books

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- Digital books, e-books: very marginal in France (1% of books)
- Literature first (in turnover )

⇒ Literature	24%
⇒ Practical and art books	17%
⇒ School books	14%
⇒ Youth books	13%
⇒ Comics, manga	9%
⇒ Scientific, tech, medicine	9%
⇒ Dictionnaires	3%

- 50 editors = 80% of turnover
- 100 books = 40% of sold books
- 7 publishing groups = 90% of turnover

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## Thank you for your attention

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