

Submission to the New National Cultural Policy Consultation

(NielsenIQ BookScan Australia)

30 April, 2026

Independent market evidence for the book sector

A strong and sustainable cultural sector depends not only on public investment in creators and institutions, but also on reliable, independent evidence that enables informed decision-making, evaluation and accountability. In the book sector, independent market measurement plays an important complementary role to cultural policy by providing a clear picture of what Australians are reading, buying and engaging with over time.

NielsenIQ BookScan Australia provides continuous, independent measurement of print book sales based on electronic point-of-sale data supplied directly by a broad panel of Australian retailers. This data is widely used across the book ecosystem — by publishers, booksellers, authors, agents, libraries and media — as a trusted source of evidence on trends, reader’s purchasing behaviour and market performance. BookScan is a commercial service and its outputs contribute to a shared understanding of the scale, reach and dynamics of Australia’s book culture.

Global context and comparability

BookScan operates as part of a **globally established market measurement framework** delivered by **NielsenIQ**, with comparable services operating across **more than 19 international territories**, including the United Kingdom, Ireland, New Zealand, India, South Africa and key European markets including France and Italy. This international footprint enables consistent, methodologically aligned analysis across markets, supporting Australia’s ability to understand domestic performance in a global context, including export potential, format shifts and international reader trends.

Relationship to cultural infrastructure

As the Government develops a new National Cultural Policy building on *Revive*, it is important to clearly distinguish between **public cultural infrastructure** and **market-provided evidence**. Bodies such as Writing Australia play a vital role in supporting authors, publishers, reading and literary culture. Independent data services such as BookScan, by contrast, support these objectives indirectly by enabling evidence-based consumer sales data tracked at the source, transparent assessment of outcomes, and informed dialogue between government and industry.

BookScan data can support several of the Policy’s continuing pillars, particularly *Strong Cultural Infrastructure* and *Engaging the Audience*, by helping the book publishing industry to:

- Monitor changes in readers’ purchasing behaviour since 2002

- Assess the real-world impact of initiatives designed to grow audiences for Australian writing
- Provide context for format, pricing and access trends
- Support internationally comparable analysis relevant to export and market development

Data limitations and metadata development

It is also important to be transparent about current limitations. At present, there is no consistently populated identification of Australian or First Nations authors at scale in the data provided to NielsenIQ BookScan Australia. This reflects ongoing metadata challenges across the global book supply chain, rather than a lack of intent or capability. We are actively working with publishers to improve the quality and coverage of accurate metadata tags supplied via ONIX files, which is a necessary step toward more accurate identification and future analysis. Continued improvement in metadata standards and adoption will be critical if policy ambitions around diversity, representation and visibility are to be meaningfully measured.

Looking ahead

We encourage the Government to continue valuing independent measurement as a complement to cultural funding and program delivery, and to support collaboration across the sector to improve metadata quality and analytical capability over time. This balanced approach will help ensure that Australia's cultural policy is both ambitious and grounded in reliable insight.