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ANNUAL BOOK PUBLISHING INDUSTRY SURVEY REPORT 2009

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1 The survey

1.1 Background to the survey

The importance of statistical information on the South African book industry has been noted by various role-players. Apart from the vested interest of publishers and the book trade, statistical information on the industry is required by the South African government through representative bodies such as the Publishers' Association of South Africa (PASA) and the South African Book Development Council (SABDC). There is also an increasing demand for this kind of information by international bodies such as the International Publishers' Association (IPA); the Board of the Frankfurt Book Fair (FBF), especially since the latter is a partner in the international Cape Town Book Fair; the organising body of the London Book Fair; UNESCO and other institutions.

In 2003 PASA, funded by the Department of Arts and Culture (DAC), launched the first data collection exercise in the book industry in the form of a snapshot survey of the industry. Initially two snapshot surveys were conducted (for the calendar years 2002 and 2003); since then the snapshot survey has been expanded into a more in-depth annual survey (2004, 2005, 2006, 2007 and 2008). A central database on book publishing, based on the data collected for the survey reports, has been developed and is housed at the Department of Information Science (Publishing Studies Division) at the University of Pretoria. This database is an invaluable tool to track and monitor changes along the book value chain over a period of time.

1.2 The survey process

The collection of data that is statistically representative remains a challenge. As far as PASA members are concerned, all the large publishers apart from one educational publisher participated in the current survey and therefore the data is statistically reliable for that cross-section, but the response rate of small publishers remains unsatisfactory. One of the reasons may be the fact that the smaller publishers do not have management information systems in place to assemble their data in the detailed manner that is increasingly required by the annual book publishing industry survey. This year, in line with the decision to expand the survey taken the previous four years, it was decided to once again invite a number of larger and medium-sized non-PASA publishers, distributors and local market agents to participate, in order to increase the representivity of the survey sample.

As no separate survey was done for the 2009 calendar year, the 2010 survey questionnaire collected the full range of data for 2010, and all the data for 2009 necessary to produce the standard Broad Trends Report covering the calendar years from 2008 to 2010.

1.2.1 Data collection

The PASA office supplied the researchers with its current list of publishers registered as PASA members. Based on this information a broad survey address list of 171 entities was compiled. This broad list included associate members, entities that are divisions/imprints of holding companies and entities whose core business is the rendering of services such as copy-editing. Based on information about the business activities of members, gleaned from *The PASA Directory 2009,* the broad PASA list was trimmed to **122** in order to target the primary business units (as opposed to holding companies or imprints) engaged in book publishing and book distribution. In addition, the appendix of publisher market shares of the *Nielsen BookScan 2008 Standard Executive Report* was used to identify significant publishers which were not PASA members. These were added to the list of targeted entities.

The **final core list** consisted of **83 targeted entities**. This list included **57** PASA members whose core business included one or more of the following activities: local publishing of books and non-book products; local distribution of local and imported books (not published by the company); local market agents importing books directly from overseas, as well as the local distribution and direct importation of non-book products (not published by the company); and other publishing-related activities (e.g. warehousing, rights sales, consultancy). In addition, **26** significant publishers which are not members of PASA were invited to participate. [57 + 26 = 83]

The questionnaire and a covering letter from the PASA Executive Committee, contextualising the *Annual Book Publishing Industry Survey*, were sent to entities on the core list as well as all other PASA members on 15 May 2011. It was stipulated that the completed questionnaire had to be returned to either of the research analysts via a dedicated e-mail address or by registered post before or on the cut-off date of 15 June 2011.

Various steps had been taken to enlist the co-operation of all relevant role-players. By 30 June 2011, only three completed questionnaires had been received. From the end of June, specific CEOs / MDs were personally targeted at regular intervals by telephone and by e-mail in order to speed up the response rate. By 31 July 2011 a total of 32 completed questionnaires had been received. The core listed publishers were once again contacted by phone and by e-mail and a new deadline of 31 August 2011 set. By 30 September 2011 40 completed questionnaires had been received and all the queries regarding previously submitted data resolved. By 11 October 2011 all the essential participants on the core list but two had completed and returned the questionnaire. After consultation with the PASA office it was agreed that the data collection process be stopped as the feedback could now be regarded as representative of the publishers in the higher turnover bands of the industry. The research team could then compile the report.

Completed questionnaires were received from 38 entities and all of these were included in the analysis. The receipt of each questionnaire was individually acknowledged via e-mail or telephone and kept on record.

For the *Snapshot Survey 2002*, 32 completed questionnaires were analysed, representing 50% of the core list of 64 entities and 97% of the estimated Total Net Turnover of all PASA-affiliated entities involved in local book publishing and sales of imported titles. For the *Snapshot Survey 2003*, 25 out of the 54 core list entities completed questionnaires, representing 46% of the sample and 97.8% of the estimated Total Net Turnover of the targeted entities. Since the *Annual Industry Survey 2004*, the net has been cast wider when the core list was compiled in order to include more entities that are involved in other types of business activities, e.g. the publishing and distribution of non-book products. The 26 questionnaires received in 2004 out of a core list of 80 represented 32.5% of the sample and 94.4% of the estimated Total Net Turnover. For the *Annual Industry Survey 2005*, 32 out of the 85 core list entities completed questionnaires, representing 37.65% of the sample and 95.0% of the estimated Total Net Turnover. For the *Annual Industry Survey 2006*, 36 out of the core list of 99 entities completed questionnaires, representing 36.4% of the targeted sample and 93.0% of the estimated Total Net Turnover. For the *Annual Industry Survey 2007*, 34 out of the core list of 115 entities completed questionnaires, representing 29.56% of the targeted sample and 93.6% of the estimated Total Net Turnover. For the *Annual Industry Survey 2008*, 51 out of the core list of 96 entities completed questionnaires, representing 53.1% of the targeted sample and 92.8% of the estimated Total Net Turnover. For the *Annual Industry Survey 2009*, 38 out of the core list of 83 entities completed questionnaires, representing 45.8% of the targeted sample and 83.9% of the estimated Total Net Turnover.

For the *Annual Industry Survey 2009*, 38 out of the core list of 83 entities completed questionnaires, representing 50.6% of the targeted sample and 83.3% of the estimated Total Net Turnover.

The decline in the percentage representation by total net turnover since 2008 can be partially attributed to expanding the scope of the survey by the inclusion of the large and medium-sized book suppliers which are not members of PASA.

1.2.2 Data capturing

The data collected from the 38 questionnaires was captured in MS Excel as part of the book publishing industry database. Several security measures ensured the confidentiality of the data, both in paper and electronic format.

The captured data was aggregated by the industry sub-sector in which it operates. Since this report is based on the returns of participants at business unit level (as opposed to holding company level as in the past), and since each business unit tends to focus its core business on only one of the three industry sub-sectors, it was possible to aggregate the returns of the participants by industry sub-sector in much greater detail than in the past.

1.2.3 Data analysis

Data from the 38 completed questionnaires was analysed in order to construct the following generic profiles of the South African book publishing industry: turnover, production, author, royalty, ownership, and employment. Several security and quality control measures ensured the confidentiality and integrity of the information transfer process.

The analysis, however, is based on the assumed accuracy of the data received from the participants.

1.3 The scope of the survey

It is acknowledged that the South African market for books is served by both local suppliers and other agencies supplying product directly from overseas sources. Past experience has shown that these direct-supply overseas agencies supplying local book retailers or end-users do not have the capacity to report their turnovers in the local market. Hence only South African-based book suppliers, be they local publishers or the distributors of imported books from local warehouses, were included in the survey. As no parallel survey was done for the South African book retail industry, no estimates of the total book industry turnover could be made, as was done in 2008.

In order to obtain a more focused report in terms of industry sub-sector, data was collected at the separate business unit level rather than the holding company level. The industry continued its recent trend of consolidation and diversification through mergers, acquisitions and the restructuring of subsidiaries within holding companies, often with the loss of some degree of independence. The overall result was a loss of administrative and other support staff.

Some of the major holding companies diversified into industries not directly related to book supply. As investment in socio-economic projects and staff training are mostly done at corporate level, and could not be directly allocated to the book supply industry, it was not always possible to collect this data accurately.

1.4 Changes from previous surveys

A number of changes were made to the data collection and reporting format from previous surveys.

1.4.1 Revised definition of "other related income"

In previous surveys, data was collected on "other related income", which included income generated by training, warehousing and editorial services rendered to smaller publishers and individuals. This data was never reported in a consistent manner and was therefore of very limited significance. The definition of this category of income has hence been amended to "other book-related income" indicating that the income must be directly related to the sale of a specific product or a service made possible by the information contained in a specific product.

In previous surveys the income generated by online services based on professional (legal, accounting, etc.) or dictionary information was recorded under the income generated by non-book products under the sub-category digital or electronic products. As from the 2009 survey onwards this income will now be recorded as "other book-related income".

The income recorded under electronic books will hence be limited to that generated by the downloading of electronic books onto a computer or tablet reading device.

Data on the income generated by online services has been collected retrospectively for the 2008 calendar year to enable longitudinal comparisons to be made between successive annual surveys in the Broad Trends Report.

1.4.2 Overall income profile from the home and the export markets

A distinction is made between the income generated by the sale of products in the "home" market and in the export market, and between the sale of products, services and rights. To a very limited extent, the sale of products to the export market is generated by the resale of imported products to surrounding southern African countries.

1.4.3 Reclassification of "non-book products"

In previous surveys all non-paper products were classified as non-book products. A distinction is now made between printed books, electronic books and non-book products. These non-book products now include text in digital format on CDs, DVDs and video cassettes, as well as posters, charts, wall maps and folded road and street maps.

1.4.4 Distinction between adult and children's trade books

Where possible, data was collected separately for these two product sub-categories. The religious publishers, for instance, were unable to make this distinction.

1.4.5 Electronic books

For the first time, data was gathered on the sale of electronic books in terms of the number of titles made available, the number of paid downloads and the revenue generated by these sales. This segment is expected to grow in value in the future, and this trend can now be tracked.

1.4.6 Rounding off of sales values

All sales values were collected as accurately as possible, in most cases to the nearest rand. After aggregating these values, they were rounded off to the nearest thousand rand for ease of interpretation.

1.5 The core list of book suppliers invited to participate in the survey

The core list established for the 2008 survey was again used for the 2009 survey. As all PASA members were invited to participate in the survey, any new member was added to the core list.

The following changes affecting previous and present participants were recorded:

- Best Books was incorporated into NB Publishers and its results were included in the latter's data supplied.
- Fernwood Press was incorporated into Random House Struik. Its turnover was included in the Random House Struik returns.
- Lux Verbi lost its status as independent business unit within the Media24 group, and was incorporated into NB Publishers. In the consolidation process valuable data was lost and Lux Verbi was unable to report on their 2009 and 2010 results.
- Troupant Publishers' results were incorporated into Macmillan SA.
- Quartet Sales and Marketing went into liquidation and was disbanded.
- Wild Dog Press was taken over by PSD Promotions. In the consolidation process valuable data was lost and Wild Dog Press was unable to report on their 2009 results.

1.6 The focus of the survey

The survey questions focused on the following profiles of each participant:

- supplier category, marketing and sales functions, distribution arrangements;
- turnover profile by activities, which was specifically broken down into turnover of local product by sub-sector and language; turnover of imported product by sub-sector; turnover by type of sales outlet; and educational turnover per province;

- production profile by number of new titles and subsequent editions versus reprints as well as by industry sub-sector and product sub-category; and
- royalty profile.

1.7 Difficulties encountered during the survey

1.7.1 Incomplete data due to industry consolidation

During the industry downturn in 2009 a number of mergers, acquisitions, and consolidations of two or more independent business units within a holding company, and the loss or gain of significant import agencies, took place. These changes occurred at various points within the calendar year reporting period, and often resulted in the loss of some data. Unless data could be accurately reconstructed for the full twelve-month reporting period, the publishers affected were not included in the survey.

1.7.2 Diversification into products and services not directly related to the book industry

Not only was there a significant consolidation of book suppliers within holding companies, often resulting in shared support services supplied by corporate structures, but holding companies also diversified into providing products and services not directly related to books.

Most of the socio-economic development investment and staff training is done at corporate level. In many instances the data supplied for these parameters could not be directly related to the book industry, and therefore had to be left out.

The same distortion is found in the employment data supplied. Whilst the data supplied for directly book-related positions is deemed to be accurate, some of the support staff are applied across all the holding company's divisions and thus may not be entirely applicable to the book industry.

1.7.3 Sales values of locally published books

The publishing systems of most publishers carry data on a title-by-title basis only. It is therefore not possible to distinguish between home market and export sales on a title-by-title basis. The local product sales data by product category and language, etc. is hence that of all sales, and not only home market sales.

1.7.4 Incomplete questionnaires

Not all participants could or would complete all sections of the questionnaire. Great care should therefore be taken to relate the data from one section to that of another.

1.8 Comparison with previous annual surveys

It is not possible to compare the results of this survey directly with that of previous years. The participants in the surveys differ, and some participants experienced significant changes in their business operations, which have an effect on the survey results. Some participants moved into a higher turnover category either through organic growth or through mergers and acquisitions. Some participants dropped into lower turnover categories, having sold off parts of their publication lists.

As soon as this report is accepted by the Executive Committee of PASA, a *Broad Trends Report* will be compiled, based on a like-for-like comparison of all entities which participated in the 2008, 2009 and the 2010 annual book publishing industry surveys, in order to highlight the patterns or trends that manifested over these three years.

1.9 Representative nature of the survey sample

In the 2008 survey, the total net turnover value of the South African book supply industry was calculated by industry sub-sector by combining the results of the book supply and the book retail industry surveys, as well as using the Nielsen Bookscan South Africa annual retail sales values to estimate the turnovers of all suppliers which did not participate in the survey.

The estimate of the 2009 total industry net turnover values is based on the 2008 values. As the 2009 survey is based only on local participants in the industry, all turnover values for import agencies and direct imports by end-users were excluded from the 2008 values. Further adjustments were made to the 2008 values as a result of the redefinition of “other income” in the academic sub-sector and “non-book products” in the religious trade sub-sector.

In each industry sub-sector, the total net turnover values of all medium and large book suppliers who participated in all three industry surveys were compared, provided the book supplier had not been part of any mergers, acquisitions, or restructuring within holding companies, or had not experienced a significant gain or loss of agency during any of the three years under consideration. This analysis was done by industry sub-sector. The year-on-year turnover growth values were calculated and then applied to estimate the 2009 values for each industry sub-sector.

Fig. 1.1 Annual change in total net turnover by industry sub-sector

Year-on-year percentage growth / decline rates	**2009/2008**
General trade	-5.5%
Religious trade	-2.9%
Education	-6.5%
Academic	1.9%
All sub-sectors	-4.8%

Notes

- All industry sub-sectors except academic books suffered value declines compared to the previous year. The increases in 2009 academic turnover were well below the annual rate of inflation.

Fig. 1.2 Estimated annual total industry net income values by industry-sub-sector

Estimated industry net turnover	**2008**	**2009**
General trade	R 840,592,000	R 794,359,000
Religious trade	R 246,152,000	R 239,014,000
Education	R 2,024,685,000	R 1,893,080,000
Academic	R 542,420,000	R 552,726,000
All sub-sectors	R 3,653,849,000	R 3,479,179,000

Notes

- The estimated total industry net turnover across all sub-sectors declined from R3.654 billion in 2008 to R3.479 billion in 2009 (-4.8%).
- The largest value and percentage decline was recorded in the education sub-sector, from R2.025 billion in 2008 to R1.893 billion in 2009, a decline of 6.5%.
- The general trade sub-sector recorded a decline in annual net turnover of 5.6%.
- The religious trade sub-sector recorded an increase in annual net turnover of 2.8%, well below the total inflation rate for the period.
- The academic sub-sector recorded an increase of 1.8% in annual net turnover,also below the total inflation rate for the period.

Fig. 1.3 Total net turnovers of the annual surveys of 2008 and 2009

Survey total net turnover	2008	2009
General trade	R 797,722,000	R 757,221,000
Religious trade	R 231,136,000	R 194,602,000
Education	R 1,812,093,000	R 1,501,326,000
Academic	R 499,569,000	R 465,191,000
All sub-sectors	R 3,340,520,000	R 2,918,340,000

Notes

- The survey sample recorded similar trends in total net turnover as the industry as a whole.

Fig. 1.4 Percentage representation of survey sample by industry sub-sector

% Representation	2008	2009
General trade	94.9%	95.3%
Religious trade	93.9%	81.4%
Education	89.5%	79.3%
Academic	92.1%	84.2%
All sub-sectors	91.4%	83.9%

Notes

- The loss of a number of 2008 participants in the 2009 survey negatively affected the degree to which the survey sample represented the total industry. These losses were partly the result of the consolidation of the industry and the subsequent loss of data.
- The loss of one large and two medium-sized participants in the education sub-sector reduced the overall representative nature of the sample in this sub-sector from 89.5% in 2008 to 79.3% in 2009.
- Whilst the general trade sub-sector lost one medium-sized and a number of small participants in 2009, the gains achieved more than compensated for this loss, increasing the overall representation of the sample to 95.3% of the estimated industry total.
- The loss of one medium-sized participant in the religious trade sub-sector was compensated for by the gain of another, but nevertheless resulted in a decline in the percentage representation of this sub-sector.
- There was no significant loss of participants in the academic sub-sector, except for two university presses concentrating exclusively on scholarly books.
- The overall percentage representation of the industry sub-sectors by the survey sample declined from a very high 91.4% in 2008 to a still adequate 83.9% in 2009.

1.10 Revised structure of the report

The sequence of the report differs from preceding reports in that it follows a strictly top-down approach. Initially data was aggregated by the industry-sub-category of the product. The final section aggregates the data by the industry sub-category of the supplier.

At first, all income is reported on, whether derived from the sale of products, services or reproduction rights.

Thereafter, only the income derived from the sales of products is reported on, whether they are print books, electronic books or other non-book but book-related products. The analysis includes the distribution of products through the various outlet categories, and the sale of educational product in the various provinces.

The main section of the report deals with the turnover derived from the sale of print book products. Initially the turnover derived from all print book products is analysed, whereafter the focus is on locally published print books, in terms of turnover, production and royalties paid.

2 Participant profile

2.1 The core group

Fig. 2.1 Core list of targeted publishers and distributors

30 Degrees South	Macmillan South Africa
Actua Press	Marumo Publishers
All Copy Publishers	Map Studio
Artefacts	Maskew Miller Longman
Awareness Publishing	Methodist Publishing House
Best Books	Metz Press
Bible Society of South Africa	Naledi Publishers
Blue Weaver Marketing & Distribution	Nasou Via Afrika
Book Promotions	NB Publishers
Briza Publications	New Africa Books
Cambridge University Press	New Generation Publishers
Carpe Diem	New Readers Publishers
Creative Global Studios	Nutrend Productions
CUM	OBE Publishers
Derek Prince Ministries	Oxford University Press Southern Africa
Don Nelson Publishers	Pan Macmillan SA
Everybody's Books	Pearson Education South Africa
Fantasi Books	Penguin Group (SA)
Faradawn	Peter Hyde & Associates
Future Entrepeneurs	Phambili Agencies
Future Managers	Protea Boekhuis
Galapo Publications	PSD Promotions
Hay House (South Africa)	Publitech
Heinemann	Qualibooks Publishers
Hibbard Publishers	Random House Struik
HSE CC	Reading Matters
HSRC Press	RNA Distributors
Independent Publishers	Shuter & Shooter
Intersoft	Sovereign Media
Jacana Media	Stimela Publishers
Jacklin Enterprises	Struik Christian Media
Jonathan Ball Publishers	Study Opportunities
Juta & Company	The African Moon Press
Knowledge Resources	Unisa Press
Lannice Snyman	University of KwaZulu-Natal Press
LAPA Publishers	Van Schaik Publishers
Learning Channel	Vivlia Publishers & Booksellers
Lectio Publishers	Wild Dog Press
LexisNexis Butterworth SA	Wits University Press
Lux Verbi-BM	Zytech Publishing

2.2 Participants in 2008 and 2009

Fig. 2.2 List of entities that participated in the 2008 and 2009 surveys

	2008	2009
Awareness Publishing	✓	✓
Best Books*	✓	✓
Bible Society of South Africa	✓	✓
Book Promotions	✓	✓
Briza Publications	✓	✓
Cambridge University Press	✓	✓
Fantasi Publications	✓	✓
Faradawn Distributors	x	x
Fernwood Press**	✓	✓
Future Managers	✓	x
Heinemann	✓	✓
HSRC Press	✓	✓
Jonathan Ball Publishers	✓	✓
Juta & Company Limited	✓	✓
LAPA Publishers	✓	✓
LexisNexis Butterworth SA	✓	✓
Macmillan South Africa	✓	✓
Map Studio	✓	x
Maskew Miller Longman	✓	✓
Methodist Publishing House	x	x
Naledi Publishers	✓	✓
NB Publishers	✓	✓
New Readers Publishers	✓	✓
Oxford University Press Southern Africa	✓	✓
Pan Macmillan SA	✓	✓
Pearson Educational SA	✓	✓
Penguin Publishers SA	✓	✓
Protea Boekhuis	✓	x
PSD Promotions	✓	✓
Random House Struik	✓	✓
Shuter and Shooter Publishers	✓	✓
Stimela Publications	✓	✓
Struik Christian Books	✓	✓
Troupant***	✓	✓
Van Schaik Publishers	✓	✓
Via Afrika Publishers	✓	✓
Vivlia Publishers & Booksellers	✓	x
Wild Dog Press	✓	x
Wits University Press	✓	x

Unisa Press	✓	x
Total number of participants	51	38

* Best Books was incorporated into NB Publishers

** Fernwood Press was acquired by Random House Struik

***Troupant was incorporated into Macmillan SA

Notes

- Thirteen participants in the 2008 annual survey did not participate in the 2009 survey. These included one large educational publisher, one medium-sized educational publisher and four medium-sized general trade publishers. One medium-sized religious trade publisher did not participate. The other six were small publishers, including two distributors of imported books and two university presses.
- Two local book suppliers participated for the first time in 2009.

2.3 Participant profile 2009

Fig. 2.3 Participant profile by industry sub-sector

Number of participants	All sub-sectors	General trade	Religious Trade	Education	Academic
Membership category					
PASA member	27	11	1	10	5
Not PASA member	11	5	4	0	2
Size category					
Large	16	16	0	0	0
Medium	5	0	5	0	0
Small	10	0	0	10	0
Participation category					
Previous participant	37	16	4	10	7
New participant	1	0	1	0	0
Supplier category					
Local publisher only	14	6	1	4	3
Publisher & distributor	19	6	4	6	3
Local distributor only	5	4	0	0	1

2.4 Participant core business profile

Fig. 2.4 Participant core business profile by industry sub-sector

Number of participants	All sub-sectors	General trade	Religious trade	Education	Academic
Product category					
Print books	38	16	5	10	7
Electronic books	2	0	0	1	1
Non-book products	9	4	1	3	1
Online services	2	0	0	0	2
Origin category					
Locally produced	17	7	1	6	3
Imported product	5	4	1	0	1
Both local and imported	16	27	36	32	34
Language category					
English only	6	2	2	0	2
Afrikaans only	1	1	0	0	0
English and Afrikaans	26	30	31	33	31
African languages	14	4	1	8	1
Multilingual	5	1	0	4	0
Other languages	6	3	0	3	0

3 Income Profile

A distinction was made between income derived from the sale of goods and services in the home market and in the export market.

Fig. 3.1 Total income from all products and services: All industry sub-sectors

Total income profile **All sub-sectors**	**Income**	**% of Total**
Local market sales of locally published books	R 2,042,123,000	69.4%
Local market sales of imported books	R 693,172,000	23.6%
Local market sales of electronic book products	R 1,018,000	
Local market sales of non-book products	R 25,942,000	0.9%
Total sale of products in local market	R 2,762,255,000	93.9%
Export of products	R 73,335,000	2.5%
Local sales of rights	R 1,333,000	
Export sales of rights	R 1,567,000	0.1%
Other book-related income	R 103,238,000	3.5%
Total income	**R 2,941,728,000**	
Income from sale of products	R 2,835,590,000	96.4%
Income from sale of rights	R 2,900,000	0.1%
Income from book-related services	R 103,238,000	3.5%
Income from home market	R 2,866,826,000	97.5%
Income from export market	R 74,902,000	2.5%

Notes

- The book supply industry derived 96.4% of its total income from the sale of products, 0.1% from the sale of reproduction rights, and 3.5% from the sale of book related services.
- Home market income accounted for 97.5% of total income, whilst the export market contributed 2.5%.

Fig. 3.2 Total income from all products and services: General trade sub-sector

Total income profile **General trade sub-sector**	**Income**	**% of total**
Local market sales of locally published books	R 268,967,000	36.0%
Local market sales of imported books	R 460,642,000	61.6%
Local market sales of electronic book products	R 0	
Local market sales of non-book products	R 4,789,000	0.6%
Total sale of products in local market	R 734,398,000	98.2%
Export of products	R 11,657,000	1.6%
Local sales of rights	R 43,000	
Export sales of rights	R 1,559,000	0.2%
Other book-related income	R 307,000	
Total income	**R 747,964,000**	
Income from sale of products	R 746,055,000	99.7%
Income from sale of rights	R 1,602,000	0.2%
Income from book-related services	R 307,000	0.1%
Income from home market	R 734,748,000	98.2%
Income from export market	R 13,216,000	1.8%

Notes

- The general trade sub-sector derived 99.7% of its total income from the sale of products, 0.2% from the sale of reproduction rights, and 0.1% from the sale of book-related services.
- Home market income accounted for 98.2% of total income, whilst the export market contributed 1.8% to the total income derived from all core activities.

Fig. 3.3 Total income from all products and services: Religious trade sub-sector

Total income profile **Religious trade sub-sector**	**Total** **Income**	**% of** **total**
Local market sales of locally published books	R 102,745,000	56.2%
Local market sales of imported books	R 73,335,000	40.1%
Local market sales of electronic book products	R 0	
Local market sales of non-book products	R 1,227,000	0.7%
Total sale of products in local market	R 177,307,000	97.0%
Export of products	R 5,118,000	2.8%
Local sales of rights	R 356,000	0.2%
Export sales of rights	R 8,000	
Other book-related income	R 0	
Total income	**R 182,789,000**	
Income from sale of products	R 182,425,000	99.8%
Income from sale of rights	R 364,000	0.2%
Income from book-related services	R 0	
Income from home market	R 177,663,000	97.2%
Income from export market	R 5,126,000	2.8%

Notes

- The religious trade sub-sector derived 99.8% of its total income from the sale of products, 0.2% from the sale of reproduction rights, and no income from the sale of book-related services.
- Home market income accounted for 97.2% of total income, whilst the export market contributed 2.8% to the total income derived from all core activities.

Fig. 3.4 Total income from all products and services: Education sub-sector

Total income profile **Education sub-sector**	**Income**	**% of total**
Local market sales of locally published books	R 1,322,722,000	90.5%
Local market sales of imported books	R 89,918,000	6.2%
Local market sales of electronic book products	R 1,018,000	0.1%
Local market sales of non-book products	R 11,882,000	0.8%
Total sale of products in local market	R 1,425,540,000	97.5%
Export of products	R 36,470,000	2.5%
Local sales of rights	R 7,000	
Export sales of rights	R 0	
Other book-related income	R 0	
Total income	**R 1,462,017,000**	
Income from sale of products	R 1,462,010,000	100.0%
Income from sale of rights	R 7,000	
Income from book-related services	R 0	
Income from home market	R 1,425,547,000	97.5%
Income from export market	R 36,470,000	2.5%

Notes

- The education sub-sector derived almost all of its income from the sale of products.
- Home market income accounted for 97.5% of total income, whilst the export market contributed 2.5% to the total income derived from all core activities.

Fig. 3.5 Total income from all products and services: Academic sub-sector

Total income profile Academic sub-sector	**Income**	**% of total**
Local market sales of locally published books	R 347,689,000	63.3%
Local market sales of imported books	R 69,277,000	12.6%
Local market sales of electronic book products	R 0	
Local market sales of non-book products	R 8,044,000	1.5%
Total sale of products in local market	R 425,010,000	77.4%
Export of products	R 20,090,000	3.7%
Local sales of rights	R 926,000	0.2%
Export sales of rights	R 0	
Other book-related income	R 102,931,000	18.8%
Total income	**R 548,957,000**	
Income from sale of products	R 445,100,000	81.1%
Income from sale of rights	R 926,000	0.2%
Income from book-related services	R 102,931,000	18.8%
Income from home market	R 528,867,000	96.3%
Income from export market	R 20,090,000	3.7%

Notes

- The academic sub-sector derived 81.1% of its total income from the sale of products, 0.2% from the sale of reproduction rights, and 18.8% from the sale of book-related services.
- Home market income accounted for 96.3% of total income, whilst the export market contributed 3.7% to the total income derived from all core activities.

4 Turnover profile: All products

4.1 Overview of all product categories

Fig. 4.1 Total net turnover by origin and product category: All sub-sectors

Total net turnover **All industry sub-sectors**	**Turnover**	**% of** **total**
Locally published print books	R 2,109,083,000	74.5%
Imported print books	R 693,172,000	24.5%
Locally produced electronic books	R 894,000	0.0%
Imported electronic books	R 124,000	0.0%
Locally produced non-book products	R 17,683,000	0.6%
Imported non-book products	R 8,259,000	0.3%
All products	**R 2,829,215,000**	
Print books	R 2,802,255,000	99.0%
Electronic books	R 1,018,000	0.1%
Non-book products	R 25,942,000	0.9%
Locally produced products	R 2,127,660,000	75.2%
Imported products	R 701,555,000	24.8%

Notes

- Across all industry sub-sectors print books account for 99.0% of all product turnover, electronic books for 0.1% and non-book products 0.9%.
- Locally produced products account for 75.2% of total income derived from the sale of products, and imported products 24.8%.

Fig. 4.2 Total net turnover by origin and product category: General trade products

Total net turnover General trade sub-sector	Turnover	% of total
Locally published print books	R 268,983,000	36.6%
Imported print books	R 460,642,000	62.7%
Locally produced electronic books	R 0	0.0%
Imported electronic books	R 0	0.0%
Locally produced non-book products	R 2,185,000	0.3%
Imported non-book products	R 2,604,000	0.4%
All products	**R 734,414,000**	
Print books	R 729,625,000	99.3%
Electronic books	R 0	0.0%
Non-book products	R 4,789,000	0.7%
Locally produced products	R 271,168,000	36.9%
Imported products	R 463,246,000	63.1%

Notes

- Print books accounted for 99.3% of total turnover recorded in the general trade sub-sector, and non-book products 0.7%.
- No turnover was recorded for electronic books, although the questionnaire was designed to capture such data.

Fig. 4.3 Total net turnover by origin and product category: Religious trade products

Total net turnover Religious trade sub-sector	Turnover	% of total
Locally published print books	R 108,519,000	59.3%
Imported print books	R 73,335,000	40.1%
Locally produced electronic books	R 0	0.0%
Imported electronic books	R 0	0.0%
Locally produced non-book products	R 144,000	0.1%
Imported non-book products	R 1,083,000	0.6%
All products	**R 183,081,000**	
Print books	R 181,854,000	99.3%
Electronic books	R 0	
Non-book products	R 1,227,000	0.7%
Locally produced products	R 108,663,000	59.4%
Imported products	R 74,418,000	40.6%

Notes

- In the religious trade book sub-sector print books accounted for 99.3% of total recorded turnover, and non-book sales 0.7%.
- The definition for non-book sales was revised to include only such products based in some way on book products. For this reason the values recorded this year are much lower than last year (2008). Comparative data was obtained to enable accurate longitudinal comparisons to be made in the Broad Trends Reports.
- Locally produced products contributed 59.4% to total turnover.

Fig. 4.4 Total net turnover by origin and product category: Educational products

Total net turnover Education sub-sector	**Turnover**	**% of total**
Locally published print books	R 1,344,783,000	92.9%
Imported print books	R 89,918,000	6.2%
Locally produced electronic books	R 894,000	0.1%
Imported electronic books	R 124,000	0.0%
Locally produced non-book products	R 7,310,000	0.5%
Imported non-book products	R 4,572,000	0.3%
All products	**R 1,447,601,000**	
Print books	R 1,434,701,000	99.1%
Electronic books	R 1,018,000	0.1%
Non-book products	R 11,882,000	0.8%
Locally produced products	R 1,352,987,000	93.5%
Imported products	R 94,614,000	6.5%

Notes

- Print books accounted for 99.1% of total sub-sector turnover in the education sub-sector, with electronic books accounting for 0.1% and non-book products (mainly wall maps and charts) 0.8%.
- Locally produced product accounted for 93.5% of total turnover, the lowest relative contribution in many years.

Fig. 4.5 Total net turnover by origin and product category: Academic products

Total net turnover Academic sub-sector	Turnover	% of total
Locally published print books	R 386,798,000	83.3%
Imported print books	R 69,277,000	14.9%
Locally produced electronic books	R 0	0.0%
Imported electronic books	R 0	0.0%
Locally produced non-book products	R 8,044,000	1.7%
Imported non-book products	R 0	0.0%
All products	**R 464,119,000**	
Print books	R 456,075,000	98.3%
Electronic books	R 0	0.0%
Non-book products	R 8,044,000	1.7%
Locally produced products	R 394,842,000	85.1%
Imported products	R 69,277,000	14.9%

Notes

- Print books contributed 98.3% to total sub-sector turnover, and non-book products (mainly professional information on CDs) the remaining 1.7%. The latter's relative contribution is declining as such products are being converted to online services.
- Imported products accounted for 14.9% of all turnover.

4.2 Non-Book products

Fig. 4.6 Net turnover of non-book products by product origin and industry sub-sector

Total net turnover Non-book products	All origins	Locally produced	Imported	% Locally produced
General trade sub-sector	R 4,789,000	R 2,185,000	R 2,604,000	45.6%
Religious trade sub-sector	R 1,227,000	R 144,000	R 1,083,000	11.7%
Education sub-sector	R 11,882,000	R 7,310,000	R 4,572,000	61.5%
Academic sub-sector	R 8,044,000	R 8,044,000	R 0	100.0%
All sub-sectors	R 25,942,000	17,683,000	8,259,000	68.2%

Notes

- Book related non-book products accounted for R25,942,000 of total net turnover.
- Of this total, 68.2% was produced locally.
- The relative contribution by local producers to sub-sector sales was lowest in the religious trade sub-sector (11.7%) and highest in the education sub-sector (61.5%).

4.3 Electronic books

Fig. 4.7 Total net turnover of electronic books by product origin and industry sub-sector

Total net turnover **Electronic books**	**Turnover**
General trade sub-sector	R 0
Religious trade sub-sector	R 0
Education sub-sector	R 1,018,000
Academic sub-sector	R 0
All sub-sectors	R 1,018,000

Notes

- Virtually no sales of electronic books were reported.
- This situation is expected to change gradually but significantly from 2011 onwards.

5 Turnover profile: All print books

Fig. 5.1 Total net turnover of print books by industry sub-sector

All industry sub-sectors **All print books**	**Total net** **turnover**	**% of** **total**
General trade sub-sector	R 729,625,000	26.0%
Religious trade sub-sector	R 181,854,000	6.5%
Educational sub-sector	R 1,434,701,000	51.2%
Academic sub-sector	R 456,075,000	16.3%
All sub-sectors	R 2,802,255,000	100.0%

Notes

- General trade books accounted for 26.0% of the turnover of all print books.
- Religious books accounted for 6.5%, the education sub-sector 51.2% and the academic sub-sector 16.3%.

Fig. 5.2 Total net turnover of print books by origin: General trade sub-sector

General trade sub-sector **All print books**	**Total net** **turnover**	**% of** **total**
Local print books	R 268,983,000	36.9%
Imported print books	R 460,642,000	63.1%
All print books	R 729,625,000	100.0%

Notes

- Locally published general trade books accounted for 36.9% of total general trade book turnover.
- The contribution by imported books was nearly double that of local publications with a turnover value of R460,642,000 or 63.1% of total turnover.

Fig. 5.3 Total net turnover of print books by origin: Religious trade sub-sector

Religious trade sub-sector **All print books**	**Total net** **turnover**	**% of** **total**
Local print books	R 108,519,000	59.7%
Imported print books	R 73,335,000	40.3%
All print books	R 181,854,000	100.0%

Notes

- Imported books contributed 40.3% to total sub-sector turnover. This is significantly lower than the contribution recorded in the previous year.

Fig. 5.4 Total net turnover of print books by origin: Education sub-sector

Education sub-sector Print books	Total net turnover	% of total
Local print books	R 1,344,783,000	93.7%
Imported print books	R 89,918,000	6.3%
All print books	R 1,434,701,000	100.0%

Notes

- Locally published books dominate the education sub-sector.

Fig. 5.5 Total net turnover of print books by origin: Academic sub-sector

Academic sub-sector Print books	Total net turnover	% of total
Local print books	R 386,798,000	84.8%
Imported print books	R 69,277,000	15.2%
All print books	R 456,075,000	100.0%

Notes

- The contribution to sub-sector turnover by imported books supplied by locally based suppliers was 15.2%. This percentage would nearly double if the turnover of imported books supplied directly by overseas based suppliers was taken into account.

Fig. 5.6 Total net turnover of print books by product sub-category and origin: General trade sub-sector

General trade print books By product sub-category	Total net turnover	% of sub-total	% of total
Local fiction	R 98,455,000	28.9%	
Imported fiction	R 242,443,000	71.1%	
All fiction	**R 340,898,000**	**100.0%**	**46.7%**
Local non-fiction	R 170,528,000	43.9%	
Imported non-fiction	R 218,199,000	56.1%	
All non-fiction	**R 388,727,000**	**100.0%**	**53.3%**
All general trade print books	**R 729,625,000**		**100.0%**

Notes

- Fiction contributed 46.7% to total general trade book turnover, and non-fiction 53.3%.
- Local publications contributed 28.9% to total fiction turnovers, and 43.9% to total non-fiction turnovers.

Fig. 5.7 Total net turnover of print books by age sub-category and origin: General trade sub-sector

General trade print books By age sub-category	Total net turnover	% of sub-total
Adult fiction	R 215,365,000	67.4%
Children's fiction	R 104,221,000	32.6%
All fiction	**R 319,586,000**	**100.0%**
Adult non-fiction	R 347,713,000	89.4%
Children's non-fiction	R 41,014,000	10.6%
All non-fiction	**R 388,727,000**	**100.0%**
Local adult fiction	R 61,746,000	26.1%
Imported adult fiction	R 174,931,000	73.9%
All adult fiction	**R 236,677,000**	**100.0%**
Local adult non-fiction	R 153,619,000	44.2%
Imported adult non-fiction	R 194,094,000	55.8%
All adult non-fiction	**R 347,713,000**	**100.0%**
Local children's fiction	R 36,709,000	35.2%
Imported children's fiction	R 67,512,000	64.8%
All children's fiction	**R 104,221,000**	**100.0%**
Local children's non-fiction	R 16,909,000	41.2%
Imported children's non-fiction	R 24,105,000	58.8%
All children's non-fiction	**R 41,014,000**	**100.0%**

Notes

- For the first time since the introduction of the annual book publishing surveys general trade publishers were asked to differentiate between the turnovers derived from the sale of adult and children's books in both the fiction and non-fiction categories. Nearly all were able to provide an accurate breakdown of these turnovers.
- Adult books accounted for 67.4% of the turnover of all fiction sales, and 89.4% of all non-fiction sales.
- Nearly three-quarters, 73.9%, of all adult fiction turnover derived from the sale of imported titles, and 55.8% of all non-fiction turnover.
- Similarly, 64.8% of all children's books fiction turnover was generated by imported books, and 58.8% of all non-fiction turnover.

Fig. 5.8 Total net turnover of print books by product sub-category and origin: Education sub-sector

Education print books By origin sub-category	Total net turnover	% of sub-total	% of total
Local school books	R 1,233,084,000	93.4%	
Imported school books	R 87,692,000	6.6%	
All school books	**R 1,320,776,000**	**100.0%**	**92.1%**
Local FET textbooks	R 102,191,000	98.7%	
Imported FET textbooks	R 1,335,000	1.3%	
All FET textbooks	**R 103,526,000**	**100.0%**	**7.2%**
Local ABET workbooks	R 9,508,000	91.4%	
Imported ABET workbooks	R 891,000	8.6%	
All ABET workbooks	**R 10,399,000**	**100.0%**	**0.7%**
All education print books	**R 1,434,701,000**		**100.0%**

Notes

- School books contribute 92.1% to total sub-sector turnover, FET textbooks 7.2% and ABET workbooks 0.7%.
- Locally published books dominate the education sub-sector, with local books contributing 93.4% to the total turnover of school books, 98.7% to the turnover of FET textbooks and 91.4% to the value of ABET workbooks.

Fig. 5.9 Total net turnover of print books by product sub-category and origin: Academic sub-sector

Academic print books By origin sub-category	Total net turnover	% of sub-total	% of total
Local academic textbooks	R 223,046,000	87.1%	
Imported academic textbooks	R 33,101,000	12.9%	
All academic textbooks	**R 256,147,000**	**100.0%**	**56.2%**
Local professional books	R 160,395,000	83.8%	
Imported professional books	R 30,933,000	16.2%	
All professional books	**R 191,328,000**	**100.0%**	**42.0%**
Local scholarly books	R 3,357,000	39.0%	
Imported scholarly books	R 5,243,000	61.0%	
All scholarly books	**R 8,600,000**	**100.0%**	**1.9%**
All academic print books	**R 456,075,000**		**100.0%**

Notes

- Academic textbooks contribute 56.2% to total industry sub-sector turnover, professional books 42.0% and scholarly publications 1.9%.

- Locally supplied imported books accounted for 12.9% of academic textbook turnover, 16.2% of professional book turnover, and 61.0% of scholarly books turnover.
- There was a sudden increase in the turnover recorded by imported professional print books.
- As only one of the four local university presses participated in the survey, the contribution of local books is likely to be considerably higher than indicated above.

6 Turnover profile: Locally published print books

6.1 Locally published books by product sub-category

For the first time data for the turnover and production of adult and children's books in the general trade sub-sector was collected separately in 2009.

Fig. 6.1 Total net turnover of locally published books by product sub-category

Locally published print books By product sub-category	**Turnover**	**% of sub-total**	**% of sub-total**	**% of total**
General trade fiction: adult	R 61,746,000	62.7%		
General trade fiction: children's	R 36,709,000	37.3%		
General fiction sub-total	**R 98,455,000**	**100.0%**	**36.6%**	
General trade non-fiction adult	R 153,619,000	90.1%		
General trade non-fiction children's	R 16,909,000	9.9%		
General non-fiction sub-total	**R 170,528,000**	**100.0%**	**63.4%**	
General trade total	**R 268,983,000**		**100.0%**	**12.8%**
Religious books total	R 108,519,000	**100.0%**		**5.1%**
School books	R 1,233,084,000	91.7%		
FET textbooks	R 102,191,000	7.6%		
ABET workbooks	R 9,508,000	0.7%		
Education total	**R 1,344,783,000**	**100.0%**		**63.8%**
Academic textbooks	R 223,046,000	57.7%		
Academic professional	R 160,395,000	41.5%		
Academic scholarly	R 3,357,000	0.9%		
Academic sub-total	**R 386,798,000**	**100.0%**		**18.3%**
All locally published books	**R 2,109,083,000**			**100.0%**

Notes

- General trade books accounted for 12.8% of the net turnover value of all locally published books. Fiction contributed 36.6% to this total value, and non-fiction 63.4%. Adult titles represent 62.7% of the value of all locally published fiction titles, and 90.1% of all non-fiction titles. Locally published children's fiction title accounts for only 37.3% of the turnover values of all local fiction, and only 9.9% of the turnover values of all locally published non-fiction titles.
- Locally published religious books accounted for 5.1% of the net turnover value of all locally published books. This industry sub-sector was first reported on separately in 2008, and the

loss of one significant local publisher in 2009 makes it impossible to place this value in any historical context.

- The education sub-sector accounted for 63.8% of the net turnover of all locally published books. School books account for 91.7% of this value, less than in preceding years, and FET textbooks 7.6%, significantly higher than in the past. The contribution of ABET workbooks to total education turnover continued its recent downward trend and reported only 0.7% of total sub-sector net turnover.
- The academic sub-sector accounted for 18.3% of the value of all locally published books. This is marginally higher than in previous years, with academic textbooks contributing 57.7% to the total sub-sector net turnover.

6.2 Locally published books by language

The values recorded in this section of the report do not correspond with those previously reported as not all participants were able to break down turnovers by language. This is particularly true of the education sub-sector.

Fig. 6.2 Total net turnover of local books by language and product category

Local book by language Total net turnover	**English**	**Afrikaans**	**African languages**	**Multi-lingual**	**Other European**
Trade fiction	R 24,860,000	R 73,156,000	R 937,000	R 0	R 90,000
Trade non-fiction	R 115,474,000	R 47,260,000	R 471,000	R 6,451,000	R 81,000
Religious books	R 28,569,000	R 59,034,000	R 20,835,000	R 61,000	R 1,000
Educational schools	R 879,428,000	R 117,077,000	R 235,048,000	R 1,514,000	R 17,000
Educational FET	R 100,746,000	R 123,000	R 1,000	R 0	R 0
Educational ABET	R 9,380,000	R 1,000	R 127,000	R 0	R 0
Academic textbooks	R 207,512,000	R 15,534,000	R 0	R 0	R 0
Academic professional	R 144,019,000	R 16,376,000	R 0	R 0	R 0
Academic scholarly	R 3,351,000	R 6,000	R 0	R 0	R 0
Total	R 1,513,339,000	R 328,567,000	R 257,419,000	R 8,026,000	R 189,000

Notes

- The total turnover values by language totals R2,107,540,000. (The total turnover reported for locally published books was previously R2,109,083,000. Hence only 0.1% of total turnover of locally published books was not included in the language analysis.)
- Of this total, R1,513,339,000 or 71.8% was published in English.
- Afrikaans contributed 15.6% to the total value, the African languages combined contributed 12.2% and multilingual books (mostly dictionaries) 0.4%.

Fig. 6.3 Turnover contribution of local books to product category by language

Local books by language **Percentage contribution**	**English**	**Afrikaans**	**African languages**	**Multi-lingual**	**Other European**
Trade fiction	1.6%	22.3%	0.4%	0.0%	47.6%
Trade non-fiction	7.6%	14.4%	0.2%	80.4%	42.9%
Religious books	1.9%	18.0%	8.1%	0.8%	0.5%
School books	58.1%	35.6%	91.3%	18.9%	9.0%
FET textbook	6.7%	0.0%	0.0%	0.0%	0.0%
ABET workbooks	0.6%	0.0%	0.0%	0.0%	0.0%
Academic textbooks	13.7%	4.7%	0.0%	0.0%	0.0%
Academic professional	9.5%	5.0%	0.0%	0.0%	0.0%
Academic scholarly	0.2%	0.0%	0.0%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Notes

- School books accounted for 58.1% of the net turnover of all English books published locally.
- Academic textbooks contributed 13.7% to English local publication turnover, and professional books 9.5%. The trade sub-sector contributed 9.2% to local English turnover.
- The trade sub-sector contributed 36.7% to the turnover of Afrikaans books, with school books contributing a further 35.6%.
- School books contributed 91.3% to turnover by African language books, and religion (mainly Bible translations) a further 8.1%.
- Adult dictionaries constituted 80.4% to multilingual text book turnover, and school dictionaries 18.9%.
- The local publication in European languages other than English (mainly German, Dutch and French) was very small and concentrated in the general sub-sector focused on publication for foreign tourists.

Fig. 6.4 Total net turnover of local books by language: General trade sub-sector

General trade **Total net turnover**	**English**	**Afrikaans**	**African languages**	**Multi-lingual**	**Other European**
Trade fiction	R 24,860,000	R 73,156,000	R 937,000	R 0	R 90,000
Trade non-fiction	R 115,474,000	R 47,260,000	R 471,000	R 6,451,000	R 81,000
General trade books	R 140,334,000	R 120,416,000	R 1,408,000	R 6,451,000	R 171,000
% contribution					
Trade fiction	17.7%	60.8%	66.5%	0.0%	52.6%
Trade non-fiction	82.3%	39.2%	33.5%	100.0%	47.4%

Notes

- Non-fiction dominated the turnover of locally produced English books, accounting for 82.3% of total turnover.
- The opposite was true for Afrikaans books, where fiction accounted for 60.8% of the value of turnover.
- The turnover of general trade books in the African languages was very small and the composition between fiction and non-fiction fluctuates from year to year.
- Dictionaries made up almost the entire turnover of multilingual general trade books.

Fig. 6.5 Contribution to sub-sector net turnover by language: General trade sub-sector

General trade Total net turnover	All trade books	Fiction	Non- fiction
English	R 140,334,000	R 24,860,000	R 115,474,000
Afrikaans	R 120,416,000	R 73,156,000	R 47,260,000
African languages	R 1,408,000	R 937,000	R 471,000
Multilingual	R 6,451,000	R 0	R 6,451,000
Other European languages	R 171,000	R 90,000	R 81,000
All trade books	R 262,158,000	R 98,953,000	R 163,205,000
% contribution to total			
English	53.5%	25.1%	70.8%
Afrikaans	45.9%	73.9%	29.0%
African languages	0.5%	0.9%	0.3%
Multilingual	2.5%	0.0%	4.0%
Other European languages	0.1%	0.1%	0.0%

Notes

- Of the total turnover recorded by all locally published fiction books, English texts contributed 53.5% of the total and Afrikaans 45.9%.
- The corresponding contributions for non-fiction are 25.1% for English and 73.9% for Afrikaans.

Fig. 6.6 Total net turnover of local books by language: Education sub-sector

Education Total net turnover	English	Afrikaans	African languages	Multi-lingual	Other European
School books	R 879,428,000	R 117,077,000	R 235,048,000	R 1,514,000	R 17,000
FET textbooks	R 100,746,000	R 123,000	R 1,000	R 0	R 0
ABET workbooks	R 9,380,000	R 1,000	R 127,000	R 0	R 0
Total education	R 989,554,000	R 117,201,000	R 235,176,000	R 1,514,000	R 17,000
% contribution					
School books	88.9%	99.9%	99.9%	100.0%	100.0%
FET textbooks	10.2%	0.1%	0.0%	0.0%	0.0%
ABET workbooks	0.9%	0.0%	0.1%	0.0%	0.0%

Notes

- School books contributed 88.9% to the turnover value of all education sub-sector books published locally in English, FET textbooks 10.2% and ABET workbooks 0.9%.
- School books accounted for virtually all turnover in Afrikaans and the various African languages.
- School dictionaries were included in the school book product category and accounted for all turnover of locally published multilingual books.

Fig. 6.7 Contribution to sub-sector net turnover by language: Education sub-sector

Education sub-sector Total net turnover	Education sub-sector	School books	FET textbooks	ABET workbooks
English	R 989,554,000	R 879,428,000	R 100,746,000	R 9,380,000
Afrikaans	R 117,201,000	R 117,077,000	R 123,000	R 1,000
African languages	R 235,176,000	R 235,048,000	R 1,000	R 127,000
All local print books	R 1,341,931,000	R 1,231,553,000	R 100,870,000	R 9,508,000
% contribution				
English	73.7%	71.4%	99.9%	98.7%
Afrikaans	8.7%	9.5%	0.1%	0.0%
African languages	17.5%	19.1%	0.0%	1.3%

Notes

- English language texts accounted for 71.4% of the turnover of all school books.
- Afrikaans contributed 8.7% to the total turnover of school books, and the African languages 17.5%.
- Virtually all FET textbooks and ABET workbooks were published in English.

Fig. 6.8 Total net turnover of local books by language: Academic sub-sector

Academic **Total net turnover**	**English**	**Afrikaans**	**African languages**
Academic textbooks	R 207,512,000	R 15,534,000	R 0
Professional books	R 144,019,000	R 16,376,000	R 0
Scholarly books	R 3,351,000	R 6,000	R 0
Total education	R 354,882,000	R 31,916,000	R 0
% contribution			
Academic textbooks	58.5%	48.7%	
Professional books	40.6%	51.3%	
Scholarly books	0.9%	0.0%	

Notes

- Academic textbooks accounted for 58.5% of the net turnover of the academic sub-sector local English print book sales, and professional books 40.6%. Scholarly publications contributed the remaining 0.9% to total net turnover.
- For Afrikaans academic book sales, textbooks accounted for 48.7% and professional books for 51.3% of total net turnover in the academic sub-sector.
- No turnover was recorded for African language academic books.

Fig. 6.9 Contribution to sub-sector net turnover by language: Academic sub-sector

Academic sub-sector **Total net turnover**	**Academic sub-sector**	**Textbooks**	**Professional books**	**Scholarly books**
English	R 354,882,000	R 207,512,000	R 144,019,000	R 3,351,000
Afrikaans	R 31,916,000	R 15,534,000	R 16,376,000	R 6,000
African languages	R 0	R 0	R 0	R 0
All local print books	R 386,798,000	R 223,046,000	R 160,395,000	R 3,357,000
% contribution				
English	91.7%	93.0%	89.8%	99.8%
Afrikaans	8.3%	7.0%	10.2%	0.2%
African languages	0.0%	0.0%	0.0%	0.0%

Notes

- Of the R223,046,000 turnover recorded for textbooks, 93.0% was in English and 7.0% in Afrikaans.
- For professional books the relative contributions to turnover by language were 89.8% by English and 12.2% by Afrikaans books.
- With the exception of R6,000 or 0.2% of the total turnover recorded, all scholarly books were published in English.

7 Turnover profile: Imported print books

Fig. 7.1 Total net turnover of imported books by industry sub-sector

Total net turnover Imported print books	Turnover	% of sub-total	% of sub-total	% of total
General trade fiction: adult	R 174,931,000	72.2%		
General trade fiction: children's	R 67,512,000	27.8%		
General fiction sub-total	**R 242,443,000**	**100.0%**	**52.6%**	
General trade non-fiction adult	R 194,094,000	89.0%		
General trade non-fiction children's	R 24,105,000	11.0%		
General non-fiction sub-total	**R 218,199,000**	**100.0%**	**47.4%**	
General trade total	**R 460,642,000**		**100.0%**	**66.5%**
Religious books total	R 73,335,000	**100.0%**		**10.6%**
School books	R 87,692,000	97.5%		
FET textbooks	R 1,335,000	1.5%		
ABET workbooks	R 891,000	1.0%		
Education total	**R 89,918,000**	**100.0%**		**13.0%**
Academic textbooks	R 33,101,000	47.8%		
Academic professional	R 30,933,000	44.7%		
Academic scholarly	R 5,243,000	7.6%		
Academic sub-total	**R 69,277,000**	**100.0%**		**10.0%**
All imported books	**R 693,172,000**			**100.0%**

Notes

- General trade books accounted for 66.5% of the net turnover value of all imported books. Fiction contributed 52.6% to this total value, and non-fiction 47.4%. Adult titles represent 72.2% of the value of all imported fiction titles, and 89.0% of all non-fiction titles.
- Imported religious books accounted for 10.6% of the net turnover value of all imported books. This is considerably lower than in previous years, probably caused by the loss of import agency agreements by one significant player. A significant increase in the number of English religious books published locally was recorded, and would also have contributed to the loss of market share of imported religious books.
- The education sub-sector accounted for 13.0% of the net turnover of all imported books. This is higher than in previous years, mainly because more FET books were imported, most likely to be used at Level 4 courses at FET colleges.
- The academic sub-sector accounted for 10.0% of the value of all imported books. This is marginally lower than in previous years.

Fig. 7.2 Total net turnover of imported general trade books by age category

Total net turnover **Imported print books**	**Turnover**	**% of** **sub-total**	**% of** **total**
General fiction: adult	R 174,931,000	47.4%	
General non-fiction adult	R 194,094,000	52.6%	
General adult sub-total	**R 369,025,000**	**100.0%**	**80.1%**
General fiction: children's	R 67,512,000	73.7%	
General non-fiction children's	R 24,105,000	26.3%	
General children's sub-total	**R 91,617,000**	**100.0%**	**19.9%**
General trade total	**R 460,642,000**		**100.0%**

Notes

- Adult books contributed 80.1% to the total turnover value of imported general trade books.
- Adult fiction contributed 47.4% to the value of all adult book imports, and adult non-fiction 52.6%
- Children's fiction contributed 73.7% to the total net turnover of all imported children's books.

8 Production profile of locally published books

The term *new editions* includes both first editions and revised editions with new ISBNs.

Fig. 8.1 Number of new editions and reprints published by product category

Production profile	New editions	Reprints
Trade fiction: adult books	227	118
Trade fiction: children's books	83	50
Trade fiction sub-total	**310**	**168**
Trade non-fiction: adult	343	324
Trade non-fiction: children's	86	20
Trade non-fiction sub-total	**429**	**344**
General trade sub-total	**772**	**668**
Religious books	**263**	**270**
School books	1,967	4,028
FET colleges	117	537
ABET workbooks	14	47
Education sub-total	**2,098**	**4,612**
Academic textbooks	142	371
Professional books	39	17
Scholarly books	36	15
Academic sub-total	**217**	**403**
All sub-sector total	**3,317**	**5,797**

Notes

- The number of new editions published in 2009 is significantly lower than those of the immediately preceding years, and the number of reprints higher. This trend applies to almost all the sub-sectors and product sub-categories.
- In the education sub-sector this trend can be attributed to the introduction of the new school curricula in 2008, but was somewhat tempered by the introduction of the NQF Level 4 curricula to FET colleges in 2009.

9 Author and royalty profile

The following occurrences were reported which needed to be taken into account when analysing the royalty statistics:

- Some titles were published on a contract basis, with a fixed royalty fee having been paid in previous years.
- The survey could not account for advance royalties paid during 2009 for future sales, for the offset of past advances against current year sales, or for royalties written off as unrecoverable.
- A number of co-publications of South African publishers with overseas principals were reported as local publications, but carry no separate royalties on sales as these were included in the purchase price.
- A number of academic books were published on a profit-sharing basis not linked directly to sales volumes or values. This also applied to some author-publishers in the trade sub-sector.

Fig. 9.1 Number of authors and legal entities earning royalties by industry sub-sector

Number of authors	**All sub-sectors**	**General Trade**	**Religious Trade**	**Education**	**Academic**
Individual authors	13,171	2,318	117	8,809	1,927
Estates, etc.	954	182	75	566	130

Notes

- The education sub-sector had by far the largest number of authors earning royalties on current publications, both in terms of individuals and other legal entities such as estates and trusts.

Fig. 9.2 Royalty profile of local publishers by industry sub-sector

Royalty profile	**All sub-Sectors**	**General Trade**	**Religious Trade**	**Education**	**Academic**
Royalty paid	R 240,050,000	R 33,152,000	R 4,992,000	R 160,207,000	R 41,699,000
Net turnover	R 1,727,699,739	R 265,059,000	R 122,803,000	R 1,339,618,000	R 219,739
% royalty	12.3%	12.5%	4.1%	12.0%	19.0%

Notes

- Most religious books are not subject to royalties. These include most Bibles, and also the local co-editions with foreign publishers, where the royalty to the author is included in the purchase price of the co-edition.
- The royalty values recorded in the academic sub-sector is mainly that for the academic textbook product class in this sub-sector. It does, however, include some royalties for professional titles, which generally earn higher than average royalties. Many scholarly books are not subject to royalties.
- In the education sub-sector few ABET workbooks are subject to royalties, authors receiving a fixed remuneration for their work on publication of the first edition.
- The average percentage of net turnover paid as royalties was very much in line with those of previous years.

10 Final comments

The research team recommends that the survey be done annually to ensure that all relevant data is available to do longitudinal studies across a number of years.

Notwithstanding the fact that the report does not contain data from all 94 entities that formed the core list of the 2008 survey, feedback from the 12 (out of 25 identified) medium and 18 (out of 19 identified) large entities included in the report ensured that it constituted a representative perspective on the shape and size of the book publishing industry. (These values differ from the previously published 2008 core list as a result of mergers and the liquidation in 2009 of some 2008 core list members.)

Based on the reported total net turnover of 38 entities and the estimated maximum total net turnover of the remaining entities in the core sample the reported turnover profile represented 83.9% of the sample.

Broad trends (including comparable growth patterns based on the feedback of the entities that participated in both the 2008 and 2009 surveys) will be tabled in a separate *Broad Trends Report 2008-2010.*

The research team trusts that all publishers will be convinced of the usefulness of the data, and that all relevant major industry role-players will participate in the future.

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Addendum 1: Sales outlet categories

Category of outlet	Examples
National bookseller chains	Adams and Co., Airport Retail Concessions, Armstrongs, Bargain Books, CNA, CUM Books, Estoril, Exclusive Books, Gospel Direct, Impact Books, Juta, PNA, Protea Boekhuis, Van Schaik Booksellers, Wordsworths
Independent booksellers and/or chains	Booksellers with fewer than five sales outlets: Caxton Books, BT Books, Jasmyn, Graffiti, Fogarty's, Books 24/7, Rynew Educational Suppliers, etc.
Non-Book retail outlets	Retail outlets that sell books besides their main product lines: gift shops, curio shops, pharmacies, stationers, museums, etc.
Wholesalers, supermarkets etc.	Pick 'n Pay, Woolworths, Shoprite/Checkers, Dischem, Transworld, Baby & Co., Waltons, Silverray etc.
Internet booksellers	Kalahari.com, Loot, Netbooks, etc.
Book clubs and mail order booksellers	Leserskring/ Leisure Books, Sunday Times Book Club, etc.
Corporation direct sales	Business to business sales: corporate gift packagers, legal and accounting firms, etc.
Direct sales to the public	Website, telephonic and contact sales to members of the public.
Libraries and library suppliers	Public libraries, academic libraries, institutional research libraries and specialist booksellers serving these clients.
State and provincial institutions	Departments of Education and government institutions.
Schools	Suppliers who supply direct to schools.
School book suppliers	Holders of provincial tenders to supply school books to schools.
Other types of outlets	This category includes staff, authors, NGOs and a variety of other types of outlets.