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PASA ANNUAL INDUSTRY SURVEY 2006 REPORT

SEPTEMBER 2007

UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

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CONTENTS

EXECUTIVE SUMMARY

Data collection process

The core list for the 2006 survey contained 99 targeted entities. This list consisted of 90 PASA members whose core business included local publishing of books or non-book products; distribution of local and imported books; distribution of non-book products; and other publishing related activities (such as rates sales, warehousing, consultancy). In addition, 9 significant non-PASA publishers were invited to participate – 4 of them made use of the opportunity.

36 out of the core list of 99 entities completed questionnaires, representing 36.36% of the targeted sample (and 92.95% of the estimated Total Net Turnover of all core list entities). 16/16 targeted entities in the large publishers' category, however, participated and therefore this category is 100% representative of the targeted sample.

The composition of the participant pool differed significantly from that of the previous surveys. During 2006 Via Afrika reported on a subsidiary level (some falling into the large and others into the medium publishers' categories) and four non-PASA members participated in the survey. Therefore readers of this survey cannot make direct year-on-year comparisons between this and the previous annual reports. (See page 8.)

Data analysis and construction of profiles

Turnover profile

The combined Total Net Turnover of the participating large, medium and small publishers was R3,000,346,581. The 16 large publishers contributed 90.56% of the Total Net Turnover of the 36 participating entities. The *estimated* Total Net Turnover for all the publishers on the core list amounted to R3,227,702,581. (See page 15.)

The combined Total Net Turnover of all participating publishers was generated from the sales of local book and non-book product (72.77%), the sales of imported book and non-book product (23.05%) and the turnover from other activities (4.18%). (See page 17.)

Total book sales (local and imported) amounted to R2,825,049,322, of which 75.53% was generated by local books and 24.47% by imported books. The education sector contributed 53.54% to total book sales, the trade sector 28.91% and the academic sector 17.55%. (See pages 19 and 20.) The sales ratios of local books versus imported books according to sub-sector and publishers' category has also been analyzed. (See pages 21 to 25.)

Reported data on local book sales according to language and sub-sector represented 87.22% of the total local book sales. English generated 71.92%, Afrikaans 18.63% and the nine African languages combined 9.44% of reported sales per language. (See pages 27 and 28.) A breakdown of language and sub-sectors revealed that English dominated the local publishing scene, especially the educational and academic sectors; in Afrikaans publishing the Net Turnover of trade books exceeded that of educational books; the combined African languages had a larger market share in the educational sector than Afrikaans titles. (See pages 29 to 31.)

Production profile

The 36 participating publishers reported a total of 13,496 local titles published during 2006: 4,374 first editions (representing 32.41% of the total production) and 9,122 subsequent editions and reprints (representing 67.59% of the total production). A breakdown of local title production according to sub-sector and language was also provided. (See pages 32 to 37.)

Author profile

The 36 participating publishers reported a total of 16,528 entities receiving royalties during 2006: 15,608 authors and 920 other parties. (See page 38.) The expanded participant pool impacted notably on the number of authors reported. It must be taken into account, however, that the same author can be published by various publishers and that the author pool can only be accurately established by means of the construction of a nation-wide author database.

Since one large educational publisher did not provide a breakdown of its authors into population groups, it was not possible to undertake representative statistical analyses for this sub-sector. In the trade and academic sub-sectors the ration black versus white authors are not representative of the population profile. (See pages 38 and 39.)

Royalty profile

Not all recorded sales were subjected to royalty payment. Total royalty-related turnover was R2,096,537,144. This Rand value presented 98.26% of the Total Net Turnover for sales of local books. The Rand value of royalty paid out by all participating publishers amounted to R307,660,385. This represented an average of 14.67% for the participating publishers. (See page 41.)

Two kinds of royalty averages were calculated based on the feedback by participating publishers: (i) The average royalty percentage per publishers' category and sub-sector calculated as a percentage of the rand value of royalties paid out based on royalty-related turnover; and (ii) the average royalty percentage per publishers' category and sub-sector calculated as an average percentage of the range. (See page 40.)

Ownership and employment profiles

These profiles are reported on in a separate report on the BBBEE status of companies. It is recommended that these profiles are included once again in the Annual Industry Survey in order to simplify liaison with the industry.

BACKGROUND

In recent years 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 there is an increasing demand for this kind of information by international bodies such as the International Publishers' Association (IPA) and the Board of the Frankfurt Book Fair (FBF), especially since the latter is a partner in the international Cape Town Book Fair. Statistical information on the industry is also required by the South African government, through individual representative bodies such as the Publishers' Association of South Africa (PASA) or the PICC (Print Industries Cluster Council), which has recently been transformed into the South African Book Development Council (SABDC).

In 2003 PASA, funded by the Department of Arts and Culture (DAC) through the PICC, planned 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 had been expanded into a more in-depth annual survey (2004, 2005 and 2006). A central database on book publishing, based on the data collected for the survey reports, has been developed and 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.

The collection of data that is statistically representative remains a challenge. As far as PASA members are concerned, the larger publishers all participated in the current survey and therefore the data is statistically reliable for that cross-section, but the response rate of small publishers is still unsatisfactory. One of the reasons may be the fact that the smaller publishers do not have systems in place to assemble their data in the detailed manner that is increasingly required by the PASA annual industry survey. This year, for the first time since conducting the industry surveys, it was decided to invite a number of the larger and medium-sized non-PASA publishers, distributors and local market agents to participate, in order to increase the representivity of the survey sample.

DATA COLLECTION PROCESS

The PASA Office supplied the researchers with its current list of CEOs/ MDs of publishers registered as PASA members. Based on this information a **broad survey address list of 160** 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 2007,* the broad PASA list was trimmed to **90** in order to target a representative sample.

The **final core list** consisted of **99 targeted entities**. This list included **90** PASA members whose core business included one or more of the following activities: local publishing of books and non-book products; distribution of local and imported books (not published by the company); distribution of non-book products (not published by company); and other publishing related activities (e.g. warehousing, rights sales, consultancy). In addition, **9** significant non-PASA publishers were invited to participate.

Core list of targeted publishers, distributors and independent market agencies

Aardvark Press (Pty) Ltd
Actua Press
AllCopy Publishers
Anansi CC
Awareness Publishing SA (Pty) Ltd
Bateleur Books (Pty) Ltd
Bell-Roberts Print & Publishing CC
Berlut Books CC
Bible Society of South Africa
BitaByte
Blue Weaver Marketing & Distribution
Book Promotions / Horizon Books
Briza Publications
Cambridge University Press: African Branch
Carpe Diem
CLS Publishers
CUM
Ebony Books CC
Effective Teaching Publishers (Pty) Ltd
Elf Publishers
Fantasi Books (Pty) Ltd
Fernwood Press
Flesch Publications
Fuscana Publishers
Future Managers (Pty) Ltd
Heinemann (Reed Elsevier SA)
Hibbard Publishers (Pty) Ltd
HPH Publishing
HSRC Press
Ilitha Publishers
Intelligent Media
Jacana Media (Pty) Ltd
John Wiley & Sons Ltd
Jonathan Ball Publishers
Junior Student Publishers
Juta & Company Limited
Kidza Books
Lannice Snyman Inc
LAPA Publishers
Lectio Publishers (Pty) Ltd
LexisNexis Butterworth SA (Pty) Ltd
Lets Look
Litera Publications
Lotsha Publications
Lovedale Press
Lux Verbi-BM
Macmillan South Africa (Pty) Ltd
Margie Ogilvy Promotions CC
Maskew Miller Longman (Pty) Ltd
McGraw-Hill Educational
METC (Pty) Ltd
Metz Press
Nam Publishers
Nasou Via Afrika
NB Publishers
New Africa Books (Pty) Ltd
New Dawn Publishers
New Generation Publishers
New Holland Publishing (SA) (Pty) Ltd
New Readers Publishers
Nutrend Publishers
OBE Publishers
Oxford University Press Southern Africa
Palm Publishers
Pan Macmillan SA (Pty) Ltd
Penguin Group (SA)
Protea Boekhuis
PSD Promotions (Pty) Ltd
Publitech
Pulse Education Services CC
Qualibooks Publishers
Quartet Sales & Marketing
R.I.C. Publications
Rainbird Publishers CC
Random House (Pty) Ltd
Reading Matters (READ)
Real Books
Scholastic Inc
Shuter & Shooter Publishers (Pty) Ltd
SMILE
Solo Collective CC
STE Publishers
Stimela Publishers
Study Opportunities
The Answer
Titles
Thomson Publications
Troupant Publishers (Pty) Ltd
Trumpeter Workbooks
Umtapo Publishers and Booksellers
University of KwaZulu-Natal Press
Van Schaik Publishers
ViVa Books
Vivlia Publishers & Booksellers (Pty) Ltd
Voices in Africa
Wild Dog Press
Wits University Press
Writers Inc Publishers
Zachen Publishers (Pty) Ltd

Notes

- In 2006 the Via Afrika Limited group reported on a subsidiary level, with Nasou/Via Afrika, NB Publishers, Jonathan Ball Publishers, Book Promotions, Van Schaik Publishers and Lux Verbi submitting separate returns, whereas in the past a consolidated holding return was submitted.
- A number of leading booksellers in the trade and academic sub-sectors were asked to rank their suppliers in terms of purchase value. From these rankings the prominent non-PASA publishers could be identified, and most of them could, with a certain degree of accuracy, be allocated to the PASA membership bands based on annual income. Nine large and medium sized non-PASA publishers were identified, approached individually and invited to participate in the survey; 4 responded positively.

Participants had to provide the following general information for the *Annual Industry Survey 2006*:

- the name of the company;
- the company's business activities; and
- a list of the company's local publishing divisions/imprints and the international imprints distributed by the company.

The survey questions focused on the following profiles of the company:

- turnover profile according to activities and then specifically broken down into turnover of local product according to sub-sector and language; and turnover of imported product, according to sub-sector;
- production profile according to number of new titles and subsequent editions/reprints as well as according to language published during 2006;
- author profile according to population group and sub-sector; and
- royalty profile.

The ownership and employment profiles were reported on in a separate Questionnaire on the BBBEE status of the company and the results will be made available in a separate report.

The 2006 Questionnaire and a covering letter from the PASA Executive Committee, contextualising the expanded *PASA Annual Industry Survey*, were sent to entities on the core list on 20 March 2007. It was clearly stipulated that the completed Questionnaire had to be returned to Dr Francis Galloway via a dedicated e-mail address or by registered post before or on the cut-off date of 16 April 2007.

Various steps had been taken to enlist the co-operation of all relevant role-players. By 16 April only 2 completed Questionnaires were received. From the end of April specific CEOs / MDs were personally targeted at regular intervals in order to speed up the response rate. By 25 May 2007 a total of 19 completed Questionnaires had been received. No further responses were received by 25 June, when the larger publishers were once again contacted by phone and by e-mail and a new deadline of 31 July 2007 set. The Executive Director of PASA, Dudley Schroeder, also contacted key role-players to enlist their participation. By 31 July 2007 all the larger publishers targeted had completed and returned the Questionnaire and feedback was regarded as representative of the publishers in the higher turnover bands of PASA. The research team started preparing the report in the first week of August to be presented to the PASA Exco during the Sector Council Meetings and AGM scheduled for 26-28 August 2007.

Feedback (completed questionnaires and other communication) was received from **39** entities, including 3 that declined to participate. The entities that declined to participate, for a variety of reasons, were: IDASA, Phambili Agencies and Elf Publishing. 36 (including 4 of the invited non-PASA publishers) of the 39 entities completed questionnaires and all of these were included in the analysis. The receipt of each completed 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 97.82% of the estimated Total Net Turnover of the targeted entities. Since the *Annual Industry Survey 2004* the net was 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 out of a core list of 80 represented 32.5% of the sample and 94.43% 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 95.04% of the estimated Total Net Turnover. For the *Annual Industry Survey 2006*, **36** out of the considerably expanded core list of 99 entities completed questionnaires, representing 36.36% of the targeted sample and 92.95% of the estimated Total Net Turnover.

List of entities that participated in the 2005 and 2006 industry surveys

Company	**2005**	**2006**
Allcopy	✓	×
Awareness Publishing	×	✓
Bateleur Books (Pty) Ltd	✓	×
Bible Society of South Africa	×	✓
Book Promotions	✓	✓
Briza Publications	×	✓
Cambridge University Press: African Branch	✓	✓
Fernwood Press	×	✓
HSRC Press	×	✓
John Wiley & Sons Ltd	✓	✓
Jonathan Ball Publishers	✓	✓
Juta & Company Limited	✓	✓
LAPA Publishers (Pty) Ltd	×	✓
Lectio Publishers (Pty) Ltd	✓	✓
Lets Look	✓	×
LexisNexis Butterworth SA (Pty) Ltd	×	✓
Lotsha	✓	×
Lux Verbi Publishers	✓	✓
Macmillan South Africa (Pty) Ltd	✓	✓
Margie Ogilvy Promotions	✓	×
Maskew Miller Longman (Pty) Ltd	✓	✓
Nasou/Via Afrika Publishers	✓	✓
NB Publishers	✓	✓
New Africa Books (Pty) Ltd	✓	✓
New Holland Publishing (SA) (Pty) Ltd	✓	✓
New Readers Publishers	✓	✓
Nutrend Productions	✓	✓
Oxford University Press Southern Africa	✓	✓
Palm Publishers	✓	✓
Pan Macmillan SA	✓	✓
Penguin Publishers SA (Pty) Ltd	✓	✓
PSD Promotions (Pty) Ltd	×	✓
Random House (Pty) Ltd	✓	✓
Reed Elsevier SA (Heinemann)	✓	✓
Scholastic Inc	×	✓
Shuter and Shooter Publishers (Pty) Ltd	✓	✓
Solo Collective	✓	✓
Troupant Publishers (Pty) Ltd	✓	×
Van Schaik Publishers	✓	✓
Vivlia Publishers & Booksellers (Pty) Ltd	✓	✓
Wild Dog Press	✓	✓
Wits University Press	×	✓
Total Questionnaires Analyzed	**32**	**36**

The following table provides a detailed **producer profile** of the 36 entities that participated in the *Annual Industry Survey 2006,* with reference to their local and international imprints/agencies.

Producer profile of entities that participated in the 2006 survey

COMPANIES	LOCAL IMPRINTS/AGENCIES	INTERNATIONAL IMPRINTS/AGENCIES
Awareness Publications	Awareness Publications	None
Bible Society of South Africa	Bible Society of South Africa	None
Book Promotions	Ampersand Press, Carmel Art, Catholic Institute of Education, Francolin Publishers, George Poulos, Greenhouse, International Motoring Products, K53 Project, Laugh it Off, Lagarto Studios, National Publishing, Oceans of Africa, Rainbird Publishers, SARFU Rugby Annual, Sederberg Uitgewers, Stonewall Books, Stormberg Publishers, Winelands, Wits University Press, Yale University Press	AA Publishing, A&C Black, Collins Education, Continuum, David Fulton, Duckworth Publishers, Geddes & Grosset, Granta, Guilford Publications, Hodder Educational, ITDG Publishing, Indiana Unv Press, Industrial Press, James & James Earthscan, Jessica Kingsley Publishers, Kogan Page, Letts Education, Practical Action, Pluto Press, Sheridan House, Taylor & Francis Group, Univ Presses of California, Columbia & Princeton, Whittles Publishing
Briza Publications	Briza, Marula	Global Books, Timber Press, Marshall Cavendish, Bloomings Books, Millennium House
Cambridge University Press: African Branch	Roedurico Trust	Keys to Learning
Fernwood Press (Pty) Ltd	Fernwood Press	None
HSRC Press	HSRC Press	None
John Wiley & Sons	None	Jossey-Bass, Gapstone, IDG, Frommers, Wiley VCH, Wrox, Wiley
Jonathan Ball Publishers	Jonathan Ball, AD Donker, Sunbird, Delta	Bloomsbury, Cassell Illustrated, DC comics, Hachette Illustrated, Harper Collins UK, Harper Collins USA, Harper Collins Australia, Headline, Hodder & Stoughton, Orchard, Profile, Orion, Scholastic, Simon and Schuster, Sunbird, Taschen, Time Warner UK
Juta & Company Limited	Ace, Juta, Juta Law, Juta Trade, Juta Academic, Juta Learning, Juta Gariep, Double Storey, UCT Press	None
LAPA Publishers (Pty) Ltd	LAPA	None
Lectio Publishers (Pty) Ltd	Lectio Publishers	None
LexisNexis Butterworths (Pty) Ltd	LexisNexis, Butterworths , Lex Patria	Lexis Nexis, Butterworths Tolley
Lux Verbi BM	NG Kerk Uitgewers, Lux Verbi.BM, Hugenote Uitgewers, Protea, Bybelkor, Waterkant Uitgewers	Bridge Logos, Whitaker House, International Bible Society, Destiny Image, Standard Publishing
Macmillan South Africa (Pty) Ltd	Nolwazi Educational Publishers, Macmillan, Ravan Press, Clever Books	Macmillan Ltd, Macmillan Boleswa, Palgrave, Nelson Thornes, Macmillan Education Australia, Curtain Publishers, College Press, Gamsberg Macmillan, Macmillan Botswana, Macmillan Lesotho, Macmillan Swaziland.

COMPANIES	LOCAL IMPRINTS/AGENCIES	INTERNATIONAL IMPRINTS/AGENCIES
Maskew Miller Longman (Pty) Ltd	Maskew Miller Longman, Pearson Education, Sached, Kagiso, De Jager-Haum, Prolit, Phumelela, Perskor	AWL, Allyn and Bacon, Annick Press, Cisko Press, Financial Times, Ladybird, Longman, Orion, Peachpit Press, Prentice Hall, Que, Ravette, Reuters, SAMS, York Notes, Disney, Barbie ,Lion Hudson.
Nasou Via Afrika (Pty) Ltd.	Nasou, Via Afrika, Nasou/Via Afrika, Action, Afro, Collegium, Atlas, Afritech, KZNBooks, Acacia, Juta, Gariep, Y-Press	Shortlands, Phoenix , Era, Nelson
NB Publishers	Human & Rousseau, Tafelberg, Jasmyn, Hartklop, Satyn, Mirre, Melodie, Kwela, Pharos, Best Books	None
New Africa Books (Pty) Ltd	New Africa Education, David Philip, Spearhead, Songololo	None
New Holland Publishing (South Africa) (Pty) Ltd	Struik, Struik Christian Books, Struik Christian Bibles, Struik Christian Gift, Map Studio, Zebra, Oshun, Two Dogs, New Holland, Globetrotter	Thomas Nelson Books, Tommy Nelson Books, Nelson Bibles, W Publishing, Westbow Press, Waterbrook, Kingsway Books, Christian Focus, CWR, Zondervan Books, Zondervan Bibles, Zonderkidz, Strang, Charisma House, Charisma Kids, Realms, Relevant, Siloam, Creation House, Frontline, Faith Words.
New Readers Publishers	New Readers Publishers	None
Nutrend Publishing	Nutrend, New Dawn, S & S Publishing	None
Oxford University Press Southern Africa	OUP SA	OUP worldwide, Agencies: World Bank
Palm Publishers	Palm Publishers	None
Pan Macmillan SA (Pty) Ltd	Macmillan, Picador Africa, Giraffe Books, Ravan Press	Pan Macmillan UK, Pan, Picador, Macmillan, Sidgwick & Jackson, Tor UK, Macmillan Children's Books, The Friday Project, Rodale, Boxtree, Macmillan New Writing. Pan Macmillan Australia, Holtzbrinck US: St Martins Press, Henry Holt, Farrar Straus & Giroux, Square Fish, Feiwel & Friends, Roaring Brook Press, Rodale US. Hachette Livre: Franklin Watts, Wayland, Hodder Consumer Education. Hit Entertainment, DC Thomson, Guinness, Walker Books, Frances Lincoln, Priddy Books, Hodder Wayland, Wisden, Compass Maps
Penguin Group (SA)	Penguin	Penguin UK & New Zealand & Australia & Canada & US & India, Allen Lane, Alastair Sawday, BBC Childrens', Dorling Kindersley Adult and Childrens, Hamish Hamilton, Michael Joseph, Penguin, Puffin, Viking, Warne, Rough Guide, Fig Tree, Alpha.
PSD Promotions	Self-published authors, Blackline Media, CBC, Corporate Link, Effective Training, Ernst & Young, ESKIA, Green Vision Foundation, Inkwazi, NUM, Troupant Publishers, The Enterpot, UCAN Institute, Zulu Planet	Selected McGraw-Hill imprints and titles: Amacom, Harvard Business School, McGraw-Hill Academic, McGraw-Hill trade and Professional. Selected John Wiley imprints and titles. Dummies, Fernhurst, Frommers, Jossey-Bass, Norton. Thomsons Learning, Australian Woman's Weekly, Capstone Publishing, Carson-Dellosa, Hinkler Publishing, Kaplan Educational

COMPANIES	LOCAL IMPRINTS/AGENCIES	INTERNATIONAL IMPRINTS/AGENCIES
Random House (Pty) Ltd	Random House SA, Umuzi	Anchor Books UK, Anchor US, Andersen Press, Arrow, Audio Books, Ballantine, Bantam UK, Bantam USA, Bantam Press, BBC Books, Bell Tower, Black Swan, Bodley Head, Broadway, Century, Chatto & Windus, Corgi, Corgi Yearling, Crown, David Fickling, Del Rey, Dell, Delta, Dial, Doubleday (Australia, UK, USA), Ebury Press, Eden Books, Everyman's Library, Expert, Fawcett, Fodor's, Gramercy, Harmony, Harvill Press, Hatherleigh Press, Heinemann, House of Collectibles, Hutchinson, Ivy, Jonathan Cape, Knopf, Living Language, Mainstream, Modern Library, National Geographic, New York Review of Books, Pantheon, Pimlico, Potter, Prima, Random House Audio, Random House (Australia, USA Business, Reference), Red Fox, Rider, Schocken, Secker & Warburg, Shambala, Tanoshimi, Three Rivers, Time Out Guides, Vermillion, Villard Books, Vintage UK, Vintage USA, Welcome Books, Wizard of the Coast, Yellow Jersey Press
Reed Elsevier SA (Heinemann)	Heinemann, Isando Books, Centaur, Lexicon	Ann Arbor, Academic Press, Architectural Press, Aspen, Butterworth-Heinemann, Christopher Helpm, CIMA Publishing, Digital Press, Elsevier, Excerpta Medica, Focal Press, Ginn, Greenwood, Gulf Professional, Guathier-Villars, Heinemann, Inkata Press, JAI Press, Morgan Kaufmann, Michael Wiese, Newnes, North-Holland, Pergamon Press, Poyser, Rigby, Royal Netherlands Academy of Arts and Sciences, Syngress Media, Surrey University Press
Scholastic Inc	None	Scholastic
Shuter & Shooter Publishers (Pty) Ltd	Shuter & Shooter	None
Solo Collective	Solo Collective	None
Van Schaik Publishers	JL van Schaik, Academica, Van Schaik	None
Vivlia Publishers & Booksellers (Pty) Ltd	Vivlia	System Publishing
Wild Dog Press	Wild Dog Press, Roberts Birds, Africa Geographic, Prime Origins, Wilderness Safaris, Wildlife Films, Down South Publishers, Jo-Da Bonsai	Allen & Unwin, Anness, Bradt, Chrysalis, Kyle Cathie, Murdoch Books, Usborne, Merehurst, Michael O'Mara, R & R Publishers, Tokyopop, Cico, Ryland, Peters & Small, Nicholas Brealy, Interpret, Hardie Grant, McRae Books.
Wits University Press	Wits University Press, African Treasury	None

DATA CAPTURING

The data collected from the 36 questionnaires was captured in Excel as part of the PASA industry database. Several security measures ensured the confidentiality of the data, both in paper and electronic format.

Following the procedure instituted for the 2002, 2003, 2004 and 2005 surveys, the 99 entities on the **core list** for the 2006 survey were coded according to the turnover band structure (A–L) on which PASA membership fees is based (this information was provided by the PASA office). The entities were then organised into three basic categories: LARGE PUBLISHERS (bands K & L, which included entities with an annual turnover of more than R50 million), MEDIUM PUBLISHERS (bands F-J, which included entities with an annual turnover between R5 million and R49, 999,000) and SMALL PUBLISHERS (bands A-E, which included entities with an annual turnover of less than R5 million). The subsidiary companies of the group that had previously reported at holding company level were put into the appropriate bands according to their reported turnovers. Similarly, the non-PASA publishers who participated in the survey were placed in the appropriate bands based on their reported turnover.

The **large publishers' category** on the 2006 core list comprised 16 entities (as opposed to 11 entities in 2005, due to the expanded core list). The **medium publishers' category** comprised 18 entities (as opposed to 11 entities in 2005, due to the expanded core list). The **small publishers' category** comprised 65 entities [16+18+65=99].

The 36 questionnaires used for analysis have been divided into the three publishers' categories:

- **16 questionnaires** were completed by entities in the LARGE PUBLISHERS' category on the core list of 99. Since these 16 entities comprised **all 16** entities in the K & L bands, the analysis for this category is **100% representative**.
- **13 questionnaires** were completed by entities in the MEDIUM PUBLISHERS' category on the core list of 99. Since these 13 entities comprise **13 out of 18** entities in the F, G, H, I and J bands, the analysis for this category is **72.22% representative**. Accumulative maximum potential Total Net Turnover for the 5 outstanding entities in this category was estimated at **R129,900,000**. This estimation was based on: (i) the maximum potential turnover of non-participating PASA members according to their position in the PASA membership band structure; and (ii) estimated rankings of the non-participating non-PASA entities within the broad parameters of the PASA membership band structure (see page 5). (This procedure was consistently applied since the 2002 survey.)

- **7 questionnaires** were completed by entities in the SMALL PUBLISHERS' category on the core list of 99. Since these 7 entities comprised **7 out of 65** listed entities in the A, B, C, D and E bands, the analysis for this category was only **10.77% representative** of the identified smaller publishers. Accumulative maximum potential Total Net Turnover for the 58 outstanding entities in this category was estimated at **R97,456,000**.

  [16 + 13 + 7 = 36 completed questionnaires; 5 medium + 58 small = 63 outstanding questionnaires; 36 + 63 = 99 total for core list]

The **Total Net Turnover** of the 36 completed questionnaires was **R3 000 346 581** (Rx). If the estimated figure for the 63 outstanding questionnaires (**R129 900,000** + **R97 456,000 = R227 356,000)** is added to this, the **estimated Total Net Turnover** for the 99 core list entities would be **R3 227 702 581** (Ry). The analysis below (see TURNOVER PROFILE) was based on the actual figure(s) in the questionnaires and therefore constituted Rx / Ry x 100 = **92.95%** of the estimated total turnover for all 99 entities, which gave a clear indication of the industry turnover profile.

DATA ANALYSIS

Data from the 36 completed questionnaires was analysed in order to construct the following generic profiles of the South African book publishing industry: turnover, production, author, and royalty. Several security and quality control measures ensured the confidentiality and integrity of the information transfer process.

The analysis, however, rests on the assumed accuracy of the data received from the individual participating entities.

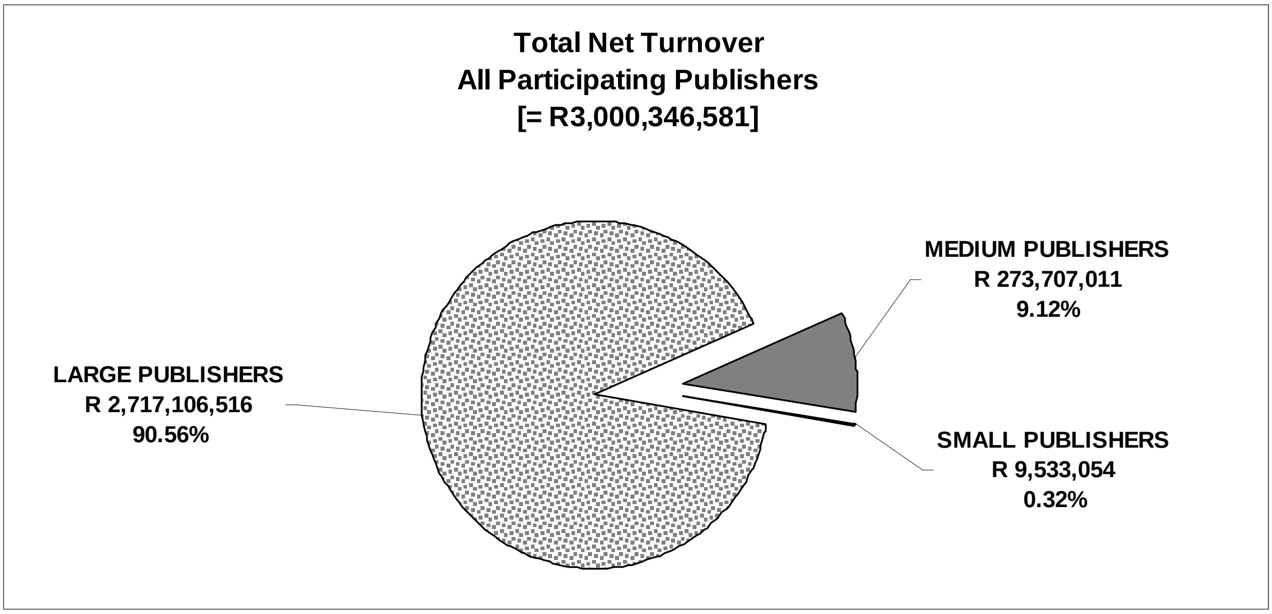
The expansion of the sample base to include non-PASA entities makes year-on-year comparisons impossible.

TURNOVER PROFILE

Total Net Turnover

*The **Total Net Turnover** (excluding VAT and discount) of all participating publishers for the period 1 January to 31 December 2006.*

Participating Large Publishers (Band K-L)	Participating Medium Publishers (Band F-J)	Participating Small Publishers (Band A-E)	Combined Total for Participating Large, Medium and Small Publishers	Non-participating Medium and Small Publishers (Maximum Potential Turnover based on PASA Membership Band)	Estimated Total Turnover for all Publishers on Core List
R2 717 106 516	R273 707 011	R9 533 054	**R3 000 346 581**	R227 356 000	**R3 227 702 581**



Notes

- These figures represented feedback from 16/16 large publishers, 13/18 medium publishers, and 7/65 small publishers.
- The 16 large publishers contributed **R2,717,106,516** (Ra) to the Total Net Turnover of **R3,000,346,581** (Rb), therefore their contribution is Ra / Rb x 100 = **90.56%** of the Total Net Turnover of the 36 participating entities.
- The Total Net Turnover of **R3,000,346,581** (Rc) constituted **92.95%** of the estimated Total Net Turnover (**R3,227,702,581** = Rd) of all 99 entities on the core list (see page 6).
- Total Gross Turnover could not be provided because most participants did not indicate gross turnover figures.
- The Total Net Turnover for 2006 cannot directly be compared with the corresponding figure for preceding years, because of the expanded sample. See the separate *Broad Trends Report* for comparative turnover information.

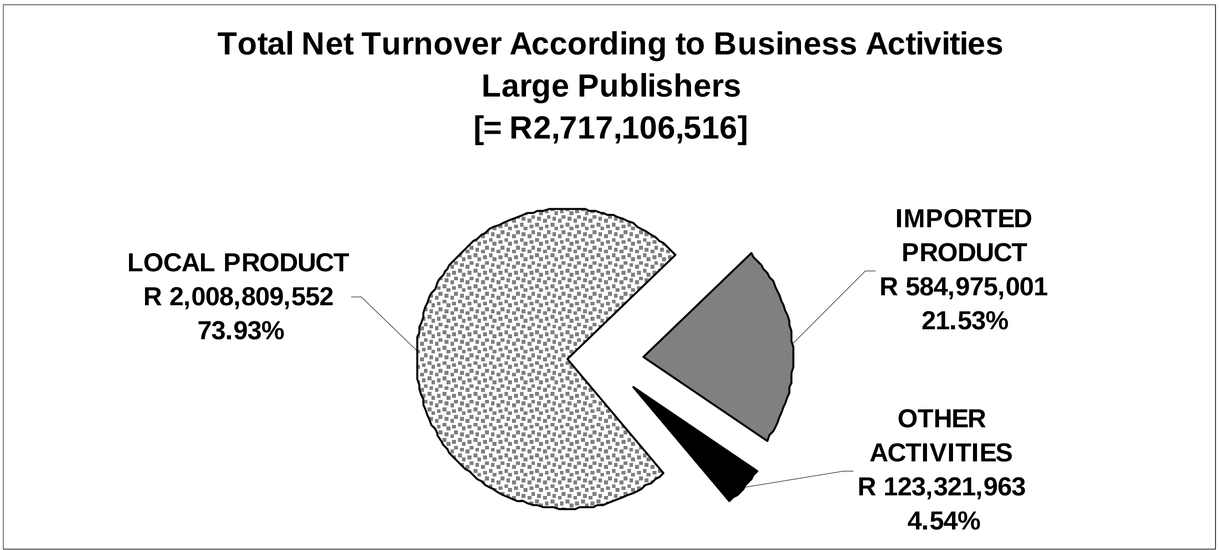
TURNOVER PROFILE

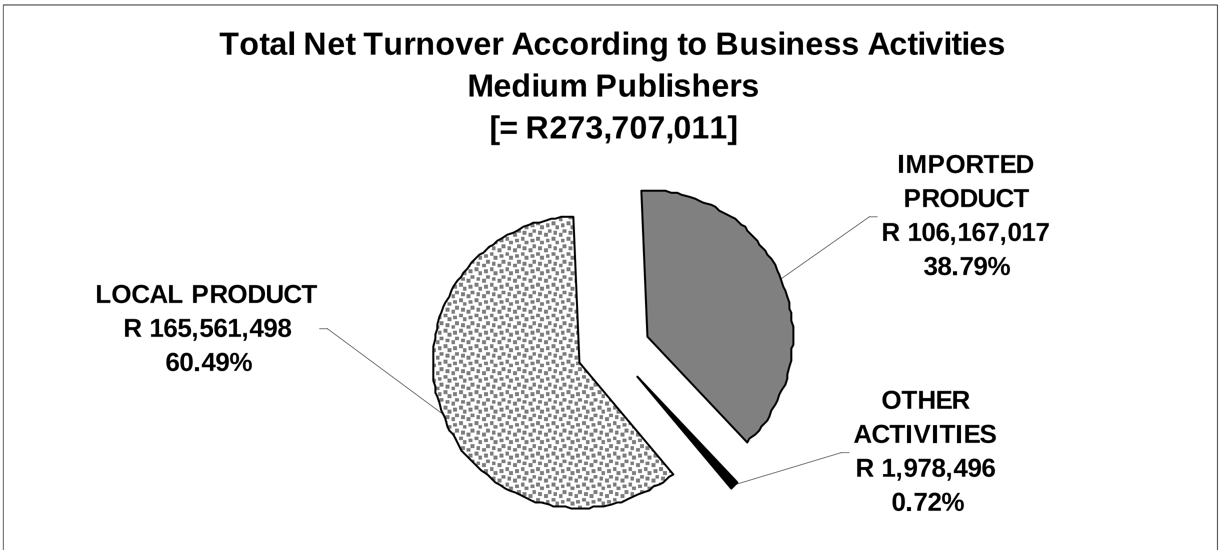
Total Net Turnover: Business Activities

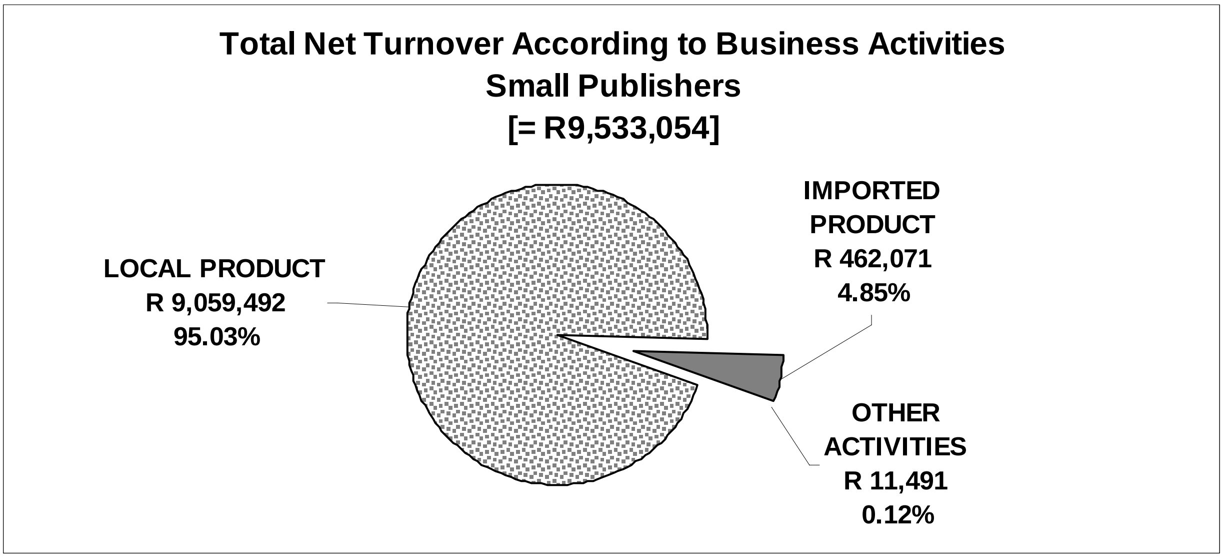
The Total Net Turnover (excluding VAT and discount) of all participating publishers for the period 1 January to 31 December 2006 according to ***business activities****.*

Total Net Turnover for **Sales of Local Product** (Books and Non-Books)	Total Net Turnover for **Sales of Imported Product** (Books and Non-Books)	Total Net Turnover for **Other Activities**	Combined Total Net Turnover by Participating Publishers for All Activities
R2,183,430,542	R691,604,089	R125,311,950	**R3,000,346,581**
72.77%	23.05%	4.18%	**100%**

Total Net Turnover According to Business Activities and Publishers' Category







Notes

- These figures represented feedback from 16/16 large publishers, 13/18 medium publishers, and 7/65 small publishers.
- The most dominant business activity of the large publishers' category was local product (73.93%).
- The business activity of the medium publishers' category reflected a dominance of local product (60.49%) with a substantial portion of imported product (38.79%).
- The small publishers' category focused almost exclusively on local product (95.03%). It is, however, important to remember that this publishers' category was under-represented in the survey.

TURNOVER PROFILE

Net Turnover: Sales of Local vs. Imported Product – According to Sub-sector

*The Net Turnover (excluding VAT and discount) of all participating publishers for sales of **local and imported product** into the South African market for the period 1 January to 31 December 2006, according to sub-sector.*

Net Turnover: Sales of Local Product vs. Sales of Imported Product – According to Sub-sector

Sector	Total Net Turnover of Sales of Local & Imported Books	Net Turnover - Sales of Local Books (Rand Value & Percentage)	Net Turnover - Sales of Imported Books (Rand Value & Percentage)
Trade sector	R816,670,033 28.91%	R360,847,546 44.19% Local	R455,822,487 55.81% Imported
Education sector	R1,512,585,770 53.54%	R1,394,777,901 92.21% Local	R117,807,869 7.79% Imported
Academic sector (incl. Journals)	R495,793,519 17.55%	R378,025,095 76.25% local	R117,768,424 23.75% Imported
Sub-Total		**R2,133,650,542**	**R691,398,780**
Total	**100%**	**R2,825,049,322**	

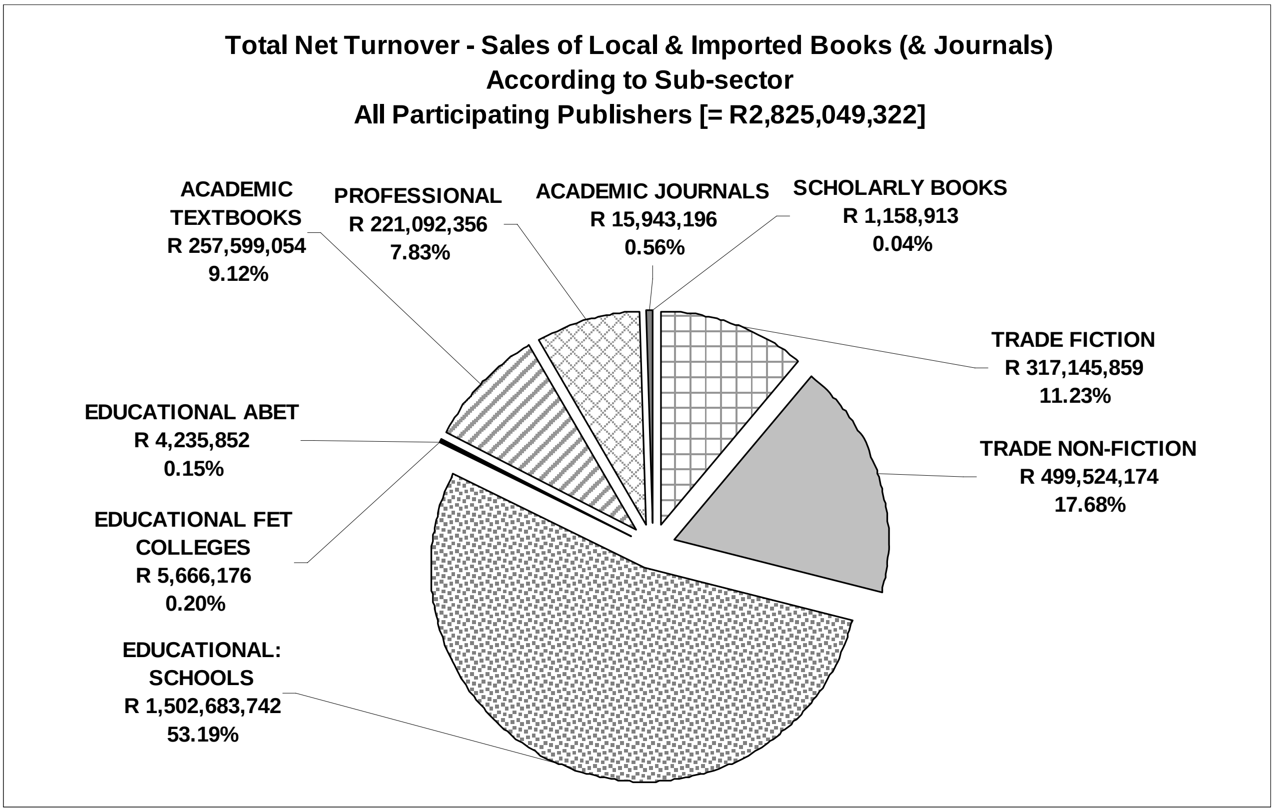
Note

- It is important to remember that the Net Turnover for the three sub-sectors was not equivalent to the Total Net Turnover of all participating publishers. The reason was that there were other business activities beside sales of local books and sales of imported books that had contributed to the Total Net Turnover. Non-book products and other activities can also be expressed per industry sub-sector in local vs. imported sales:

	Local	Imported
Total of Book Sales (as above)	**R2,133,650,542** **75.53% Local**	**R691,398,780** **24.47% Imported**
PLUS: Trade Sub-sector Non-Book Products	R34,396,404 93.11% Local	R2,545,916 8.89% Imported
PLUS: Education Sub-sector Non-Book Products	R 9,599,353 76.55% Local	R2,940,703 23.45% Imported
PLUS: Academic Sub-sector Non-Book Products	R502,873 100.00% local	R0 0% Imported
Total Net Turnover for **Non-Book Products**	R49,985,309 89.02% Local	R5,486,679 10.98% Imported
PLUS: Other Activities (Rights Sales, Warehousing, Consulting, etc.)	R125,311,950 4.18% of Total Net Turnover	
Combined Total Net Turnover by Participating Publishers for All Activities	**R3,000,346,581**	

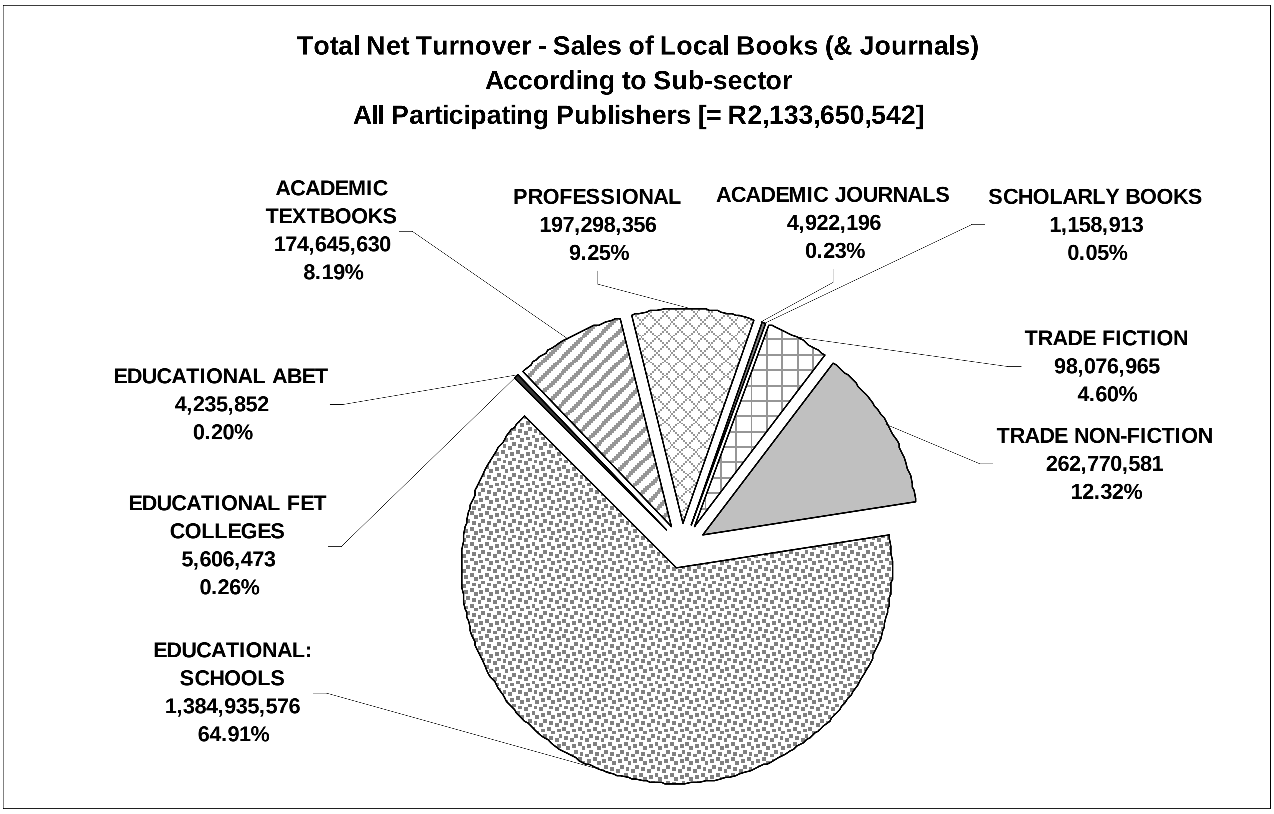
Notes

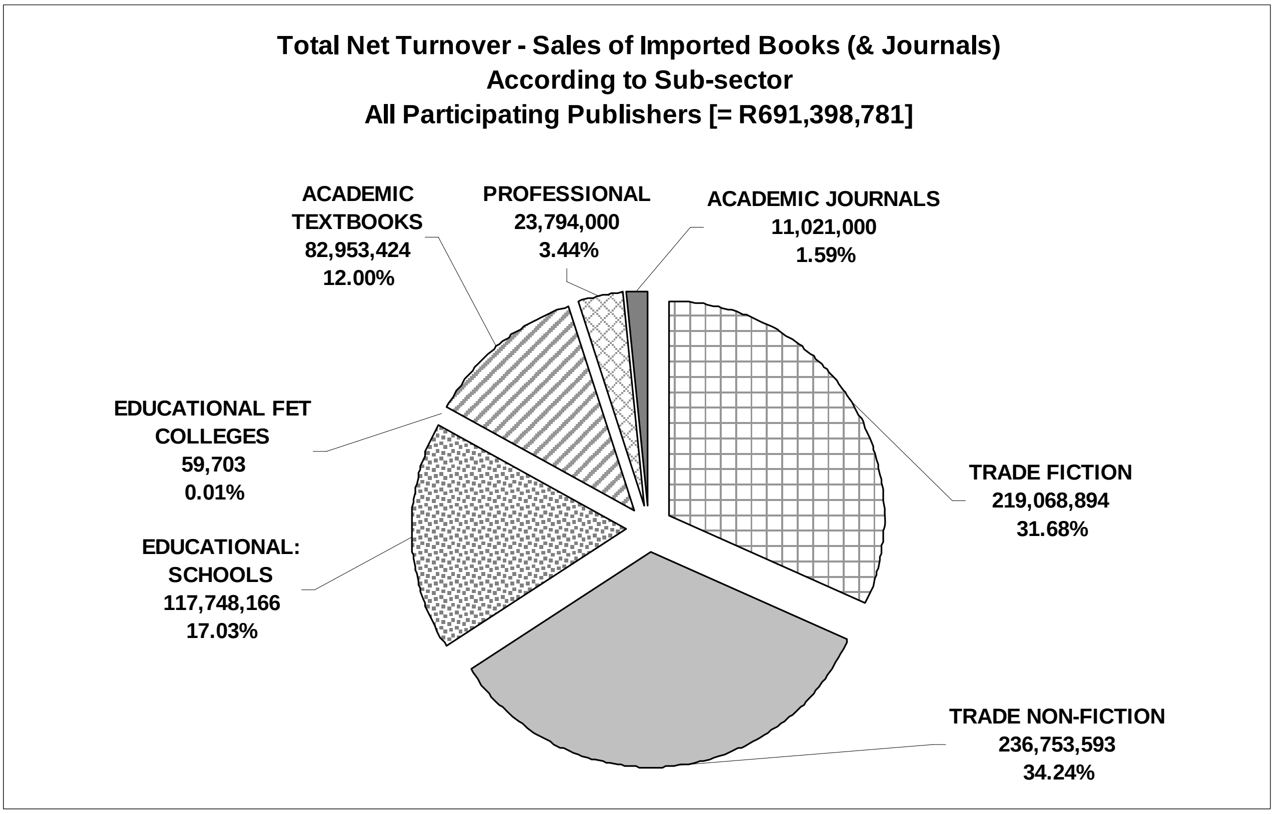
- The turnover of local versus imported academic product (including textbooks, professional books and journals) was not representative of this sub-sector, because a number of important role-players in this sector, especially local market agents for overseas publishers, did not participate in the survey. This is an issue that should be addressed in future surveys.
- Because of improved reporting, a more accurate distinction between academic textbooks and academic professional books and scholarly books could be made for the first time this year. Consequently no direct comparison with figures from the preceding years can be made. This year's sample of participating academic publishers differed significantly from preceding years.
- See pie charts below for a breakdown of sales of local books (and journals) versus sales of imported books (and journals) according to the three categories of publishers.



Notes

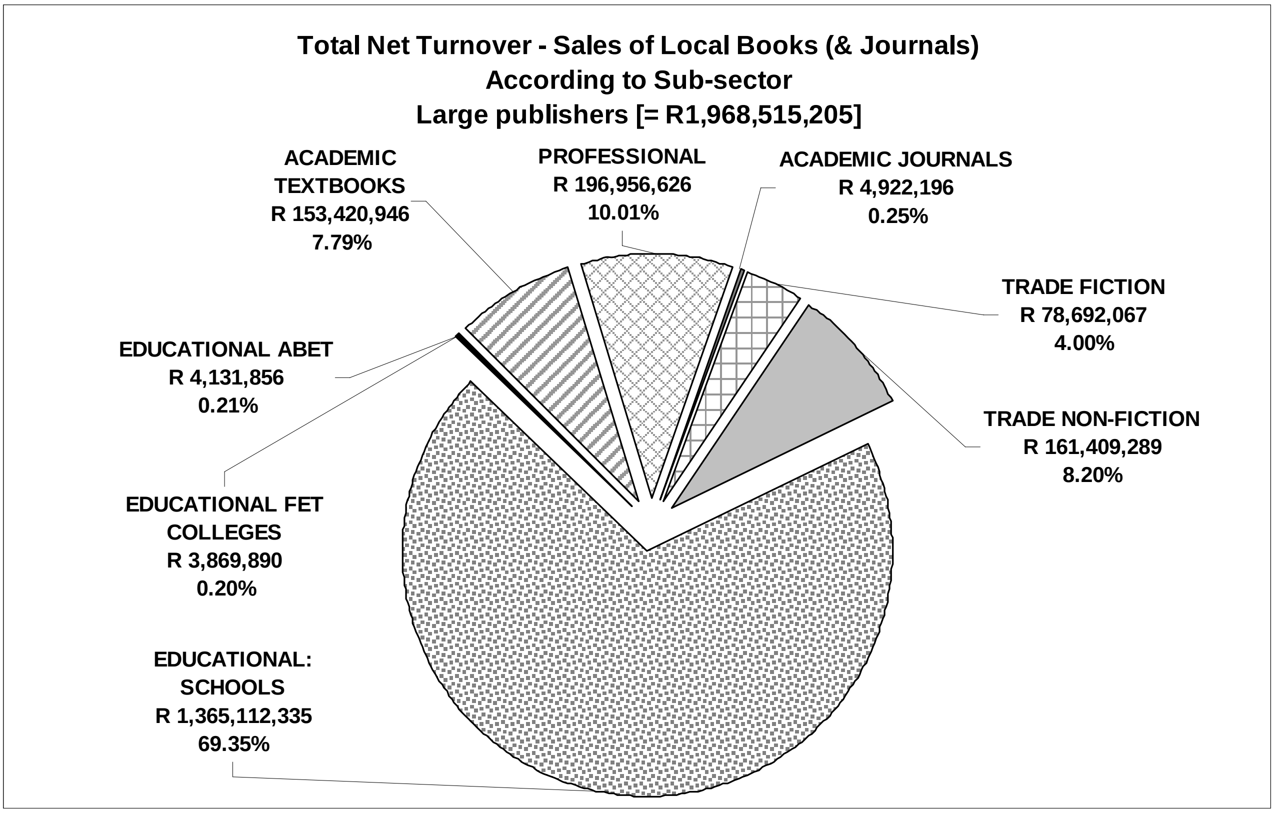
- According to these ratios, the South African book publishing industry as a whole was not as overwhelmingly dominated by the educational sub-sector as before.
- The next two pie charts distinguish between sales of local versus imported books (and journals) according to sub-sector.

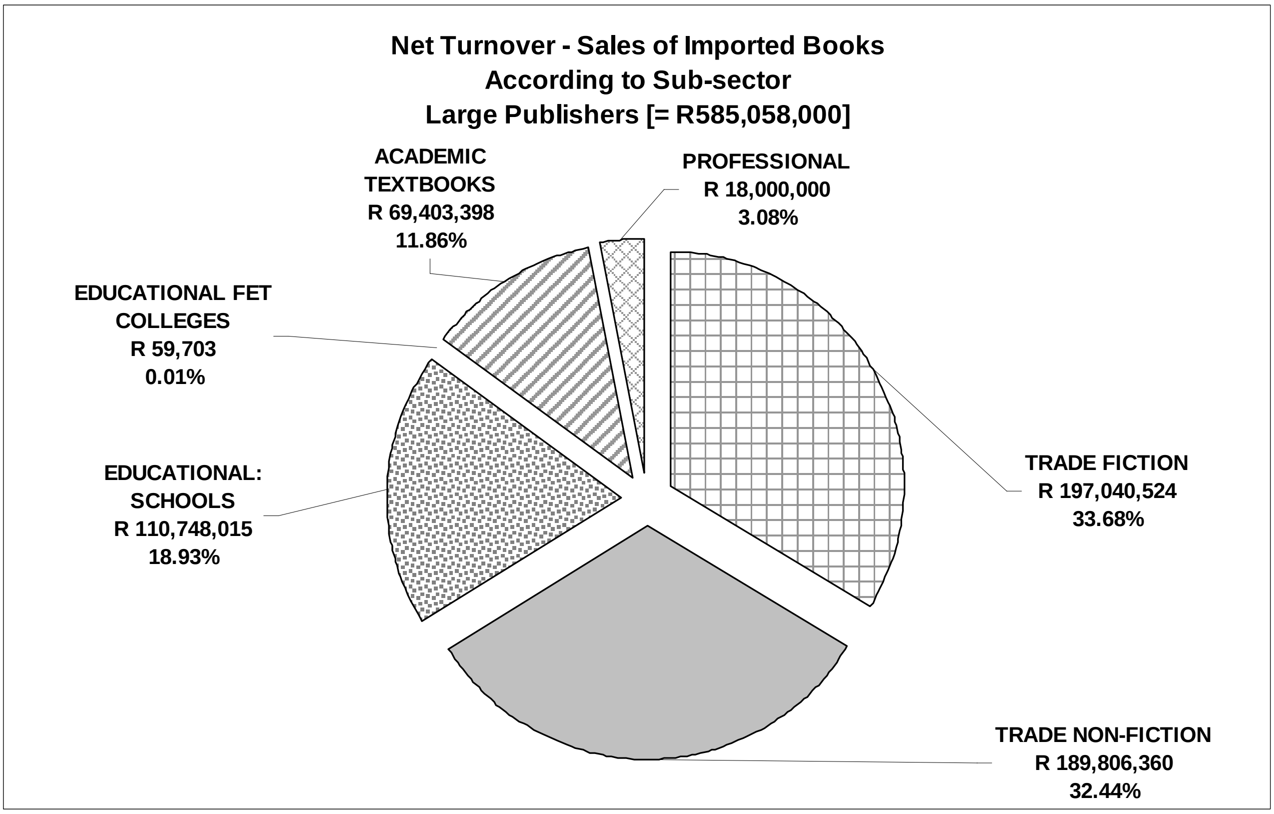

Total Net Turnover - Sales of Local Books (& Journals)
According to Sub-sector
All Participating Publishers [= R2,133,650,542]
ACADEMIC TEXTBOOKS 174,645,630 8.19%
PROFESSIONAL 197,298,356 9.25%
ACADEMIC JOURNALS 4,922,196 0.23%
SCHOLARLY BOOKS 1,158,913 0.05%
TRADE FICTION 98,076,965 4.60%
TRADE NON-FICTION 262,770,581 12.32%
EDUCATIONAL ABET 4,235,852 0.20%
EDUCATIONAL FET COLLEGES 5,606,473 0.26%
EDUCATIONAL: SCHOOLS 1,384,935,576 64.91%

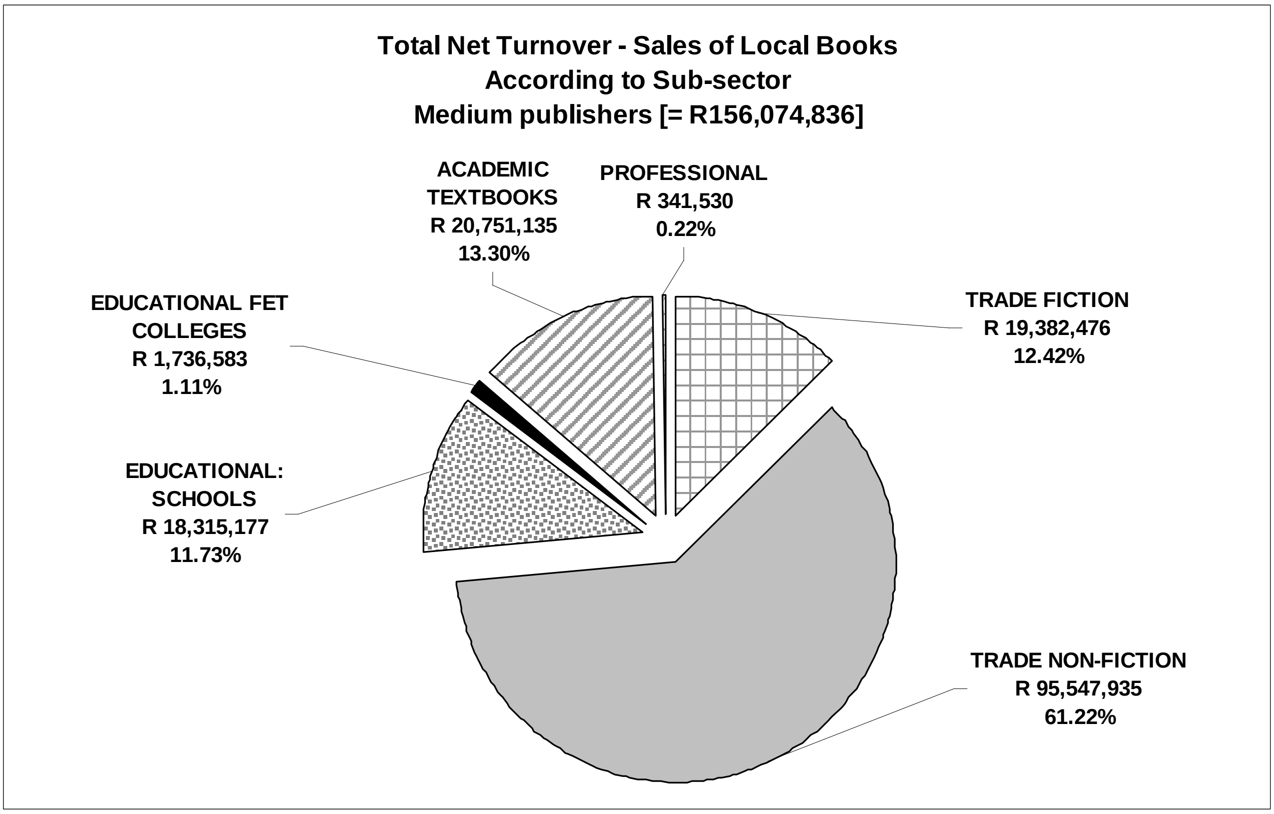

Total Net Turnover - Sales of Imported Books (& Journals)
According to Sub-sector
All Participating Publishers [= R691,398,781]
ACADEMIC TEXTBOOKS 82,953,424 12.00%
PROFESSIONAL 23,794,000 3.44%
ACADEMIC JOURNALS 11,021,000 1.59%
EDUCATIONAL FET COLLEGES 59,703 0.01%
TRADE FICTION 219,068,894 31.68%
EDUCATIONAL: SCHOOLS 117,748,166 17.03%
TRADE NON-FICTION 236,753,593 34.24%

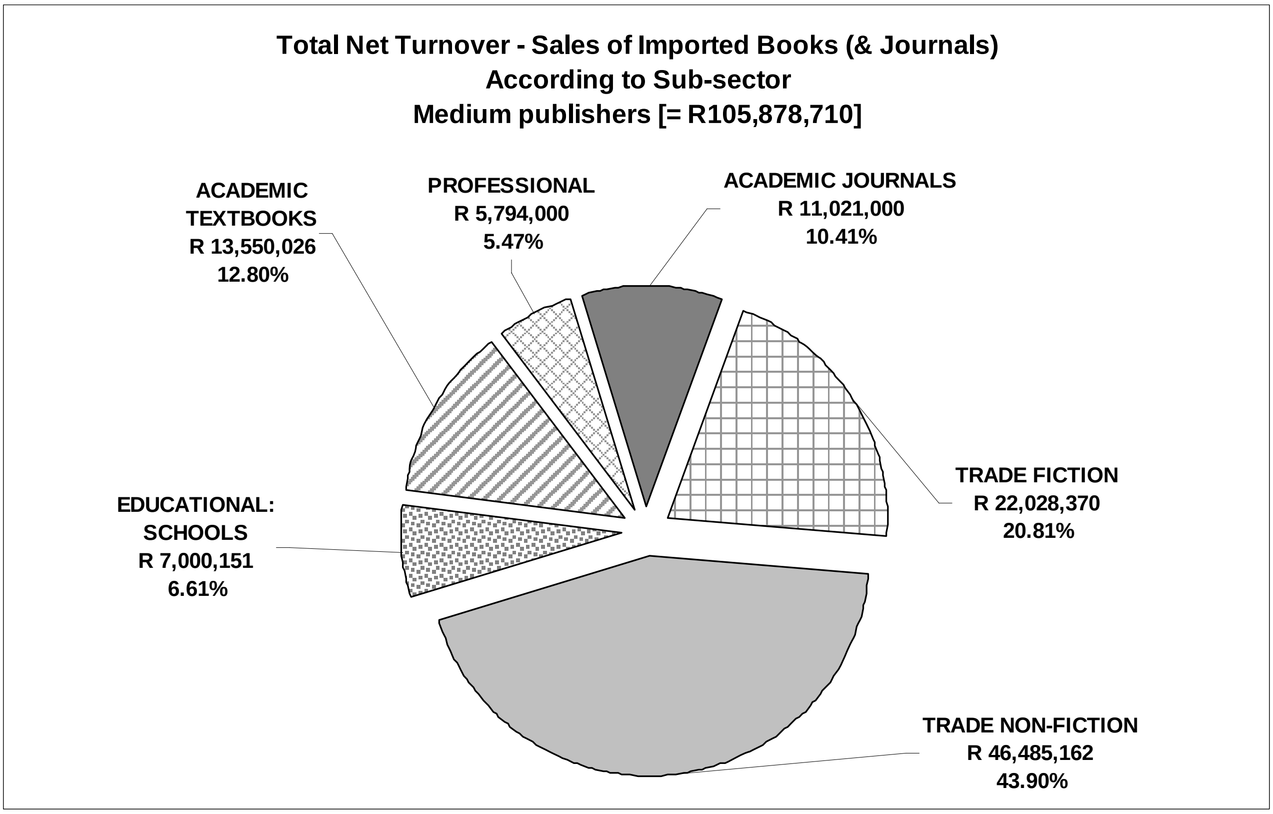
Notes

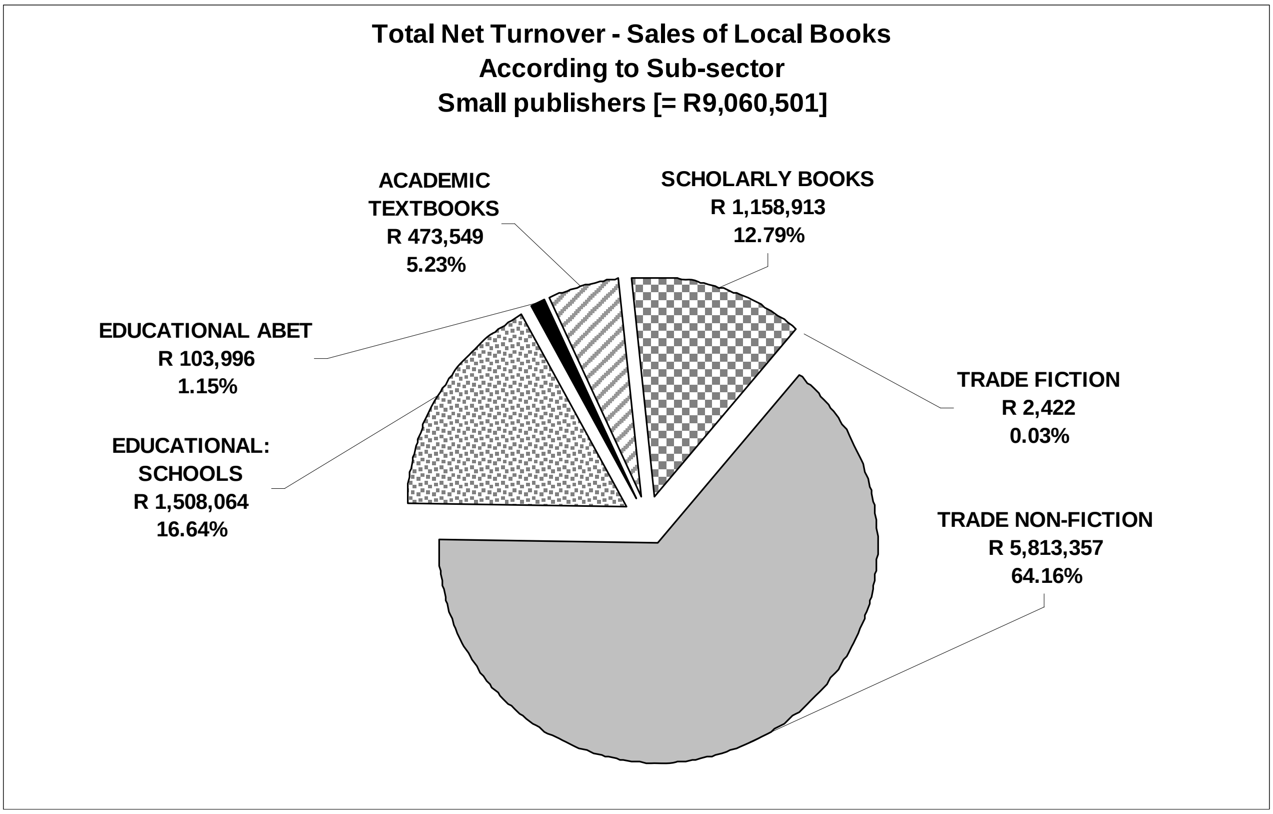
- The educational sub-sector was dominated by sales of locally published books.
- The value of local trade non-fiction was slightly higher than that of imported non-fiction.
- See note on the academic sub-sector on page 20.
- The ratio locally produced versus imported books according to sub-sector can be summarized as follows:
    - R 98,076,965 (30.92%) of all **trade fiction** sales were recorded by locally produced books and R 219,068,894 (69.08%) by imported books.
    - R 262,770,581 (52.60%) of all **trade non-fiction** sales were recorded by locally produced books and R 236,753,593 (47.40%) by imported books.
    - R 174,645,630 (67.80%) of all **academic textbook** sales were recorded by locally produced books and R 82,953,424 (32.20%) by imported books.
    - R 197,298,356 (89.24%) of all **professional book** sales were recorded by locally produced books and R 23,794,000 (10.76%) by imported books.
    - R 1,384,935,576 (92.16 %) of all **educational school book** sales were recorded by locally produced books and R 117,748,166 (7.84%) by imported books.
    - R 5,606,473 (98.95%) of all **educational FET college book** sales were recorded by locally produced books and R 59,703 (1.05%) by imported books.
    - R 4,922,196 (30.87%) of all **academic journal** sales were recorded by locally produced journals and R 11,021,000 (69.13%) by imported journals.
- The next five pie charts represent local versus imported books (and journals) according to sub-sector and publishers' category.


Total Net Turnover - Sales of Local Books (& Journals)
According to Sub-sector
Large publishers [= R1,968,515,205]
ACADEMIC TEXTBOOKS
R 153,420,946
7.79%
PROFESSIONAL
R 196,956,626
10.01%
ACADEMIC JOURNALS
R 4,922,196
0.25%
TRADE FICTION
R 78,692,067
4.00%
EDUCATIONAL ABET
R 4,131,856
0.21%
TRADE NON-FICTION
R 161,409,289
8.20%
EDUCATIONAL FET COLLEGES
R 3,869,890
0.20%
EDUCATIONAL: SCHOOLS
R 1,365,112,335
69.35%


Net Turnover - Sales of Imported Books
According to Sub-sector
Large Publishers [= R585,058,000]
ACADEMIC TEXTBOOKS
R 69,403,398
11.86%
PROFESSIONAL
R 18,000,000
3.08%
EDUCATIONAL FET COLLEGES
R 59,703
0.01%
TRADE FICTION
R 197,040,524
33.68%
EDUCATIONAL: SCHOOLS
R 110,748,015
18.93%
TRADE NON-FICTION
R 189,806,360
32.44%


Total Net Turnover - Sales of Local Books
According to Sub-sector
Medium publishers [= R156,074,836]
ACADEMIC TEXTBOOKS R 20,751,135 13.30%
PROFESSIONAL R 341,530 0.22%
TRADE FICTION R 19,382,476 12.42%
EDUCATIONAL FET COLLEGES R 1,736,583 1.11%
EDUCATIONAL: SCHOOLS R 18,315,177 11.73%
TRADE NON-FICTION R 95,547,935 61.22%


Total Net Turnover - Sales of Imported Books (& Journals)
According to Sub-sector
Medium publishers [= R105,878,710]
ACADEMIC TEXTBOOKS R 13,550,026 12.80%
PROFESSIONAL R 5,794,000 5.47%
ACADEMIC JOURNALS R 11,021,000 10.41%
TRADE FICTION R 22,028,370 20.81%
EDUCATIONAL: SCHOOLS R 7,000,151 6.61%
TRADE NON-FICTION R 46,485,162 43.90%



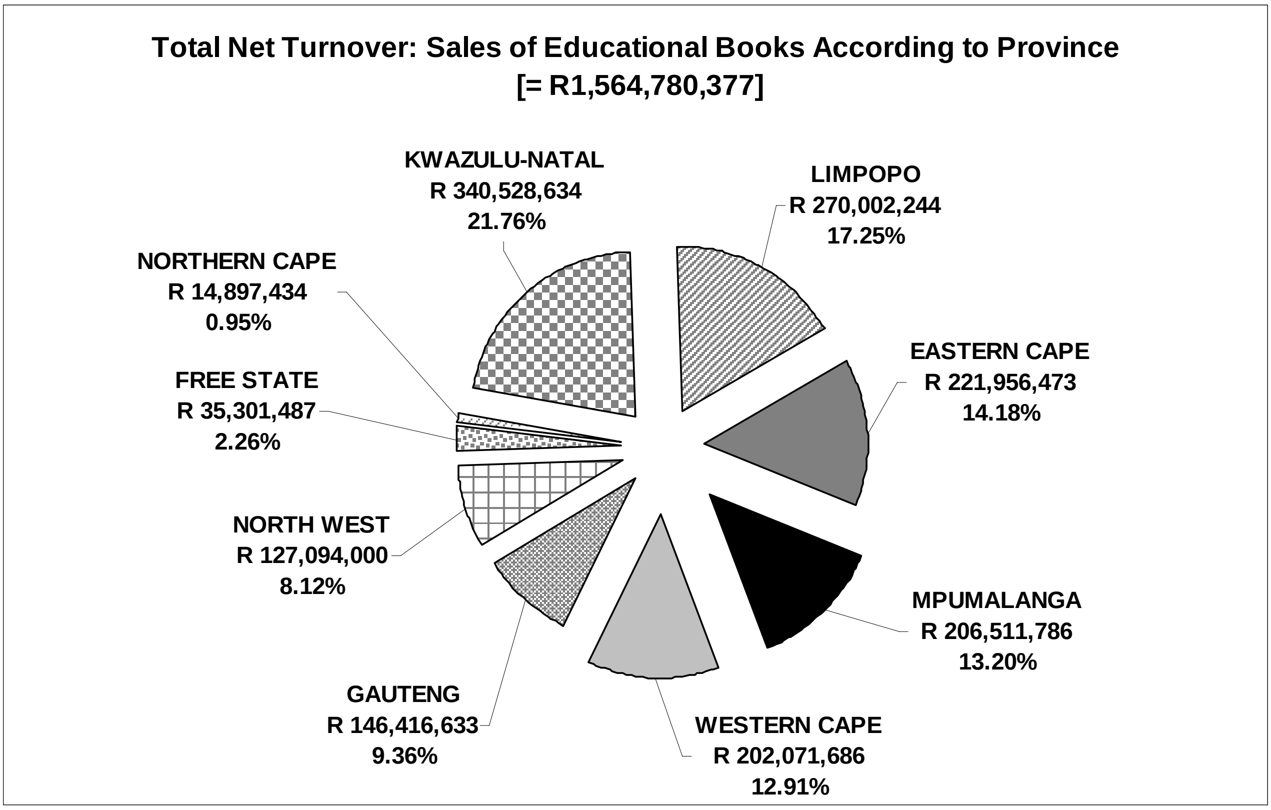
Notes

- The turnover of the large publishers' category was mainly generated by sales of local educational books and imported trade books.
- The five new participants in the medium publishers' category all focused mainly on trade books. This impacted on the sub-sector profile of the medium publishers' turnover to such an extent that year-on-year comparisons are not reliable.
- Because of the fluctuating participation in the small publishers' category, no valid trends according to sub-sector turnover could be made.
- The sales of ABET products are under-represented because of the non-participation of the relevant role-players.
- Because of pending curriculum changes the sales of FET products were very low.
- The publishers involved in scholarly books formed part of the small publishers' category.

TURNOVER PROFILE

Educational Net Turnover per Province

*The **Educational Net Turnover** (locally published and imported books) **according to province** for the period 1 January to 31 December 2006.*



Notes

- Results on the Educational Net Turnover per Province exceeded that of the Net Turnover of Educational Books and Non-Book Products (mainly wall-charts) because some of the sales were generated by prescribed and recommended texts, which were categorised as trade books in the Net Turnover per sub-sector reports.
- The top five provinces according to sales of educational books were: KwaZulu-Natal (21.76%); Limpopo (17.25%); Eastern Cape (14.18%); Mpumalanga (13.20%); and Western Cape (12.91%).
- The top 3 provinces (KwaZulu-Natal, Limpopo and Eastern Cape) accounted for 53.19% of the Educational Net Turnover.

TURNOVER PROFILE

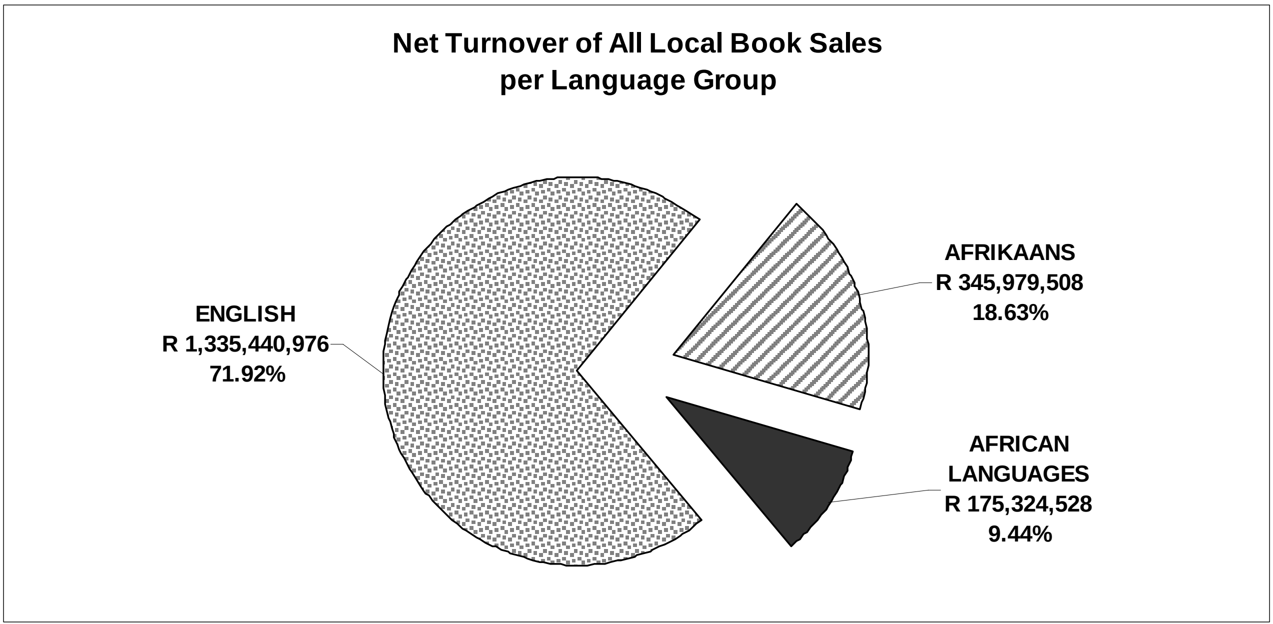
Net Turnover of Local Books per Language

Net Turnover of sales of locally published books (excluding journals) ***according to language and sub-sector*** *for the period 1 January to 31 December 2006.*

	TOTAL	ENGLISH	AFRIKAANS	ALL AFRICAN
TRADE FICTION	R 93,358,442	R 37,758,582	R 54,356,715	R 1,243,145
TRADE NON-FICTION	R 265,926,635	R 163,036,540	R 87,616,968	R 15,273,127
EDUCATIONAL: SCHOOLS	R 1,124,622,519	R 842,188,010	R 123,777,439	R 158,657,070
EDUCATIONAL FET COLLEGES	R 2,566,229	R 2,488,921	R 74,808	R 2,500
EDUCATIONAL ABET	R 4,236,055	R 4,058,010	R 112,017	R 66,028
ACADEMIC TEXTBOOKS	R 166,577,489	R 123,695,558	R 42,799,273	R 82,658
PROFESSIONAL	R 198,298,730	R 161,093,424	R 37,205,306	R 0
SCHOLARLY BOOKS	R 1,158,913	R 1,121,931	R 36,982	R 0
TOTAL	**R 1,856,745,012**	**R 1,335,440,976**	**R 345,979,508**	**R 175,324,528**

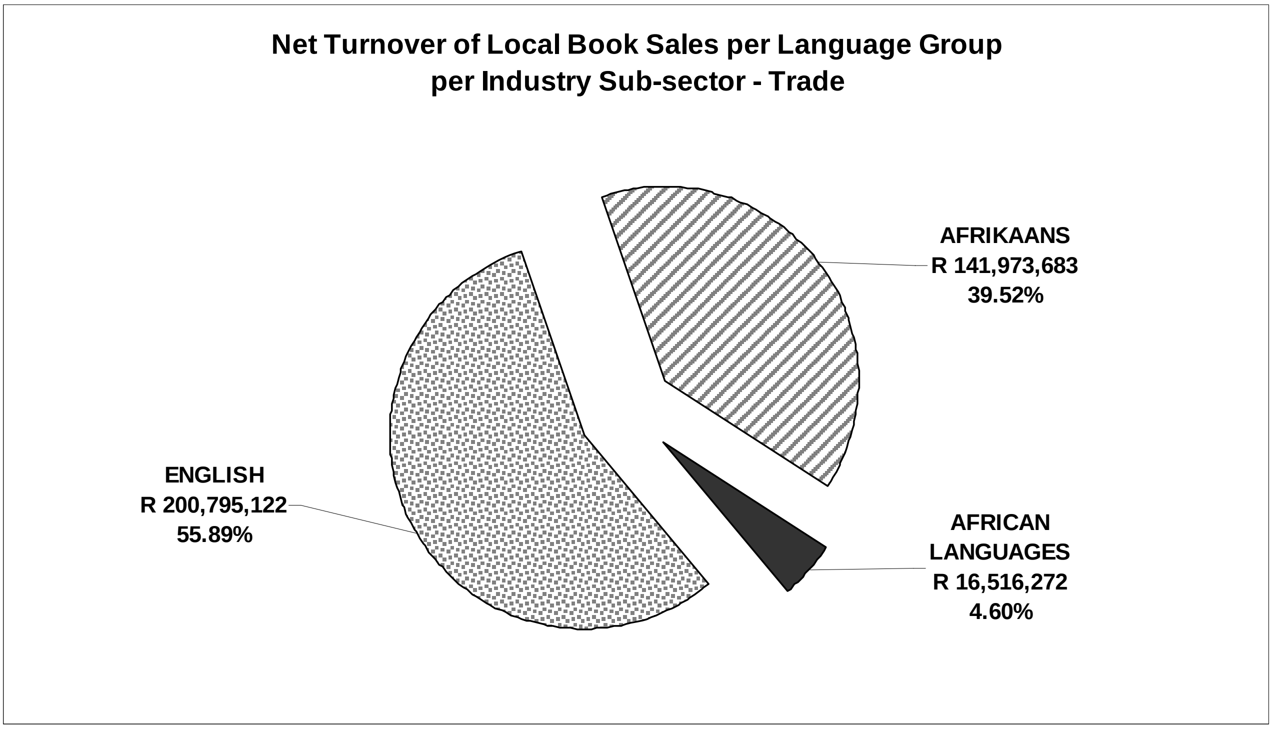
	ISIZULU	ISIXHOSA	SEPEDI	SESOTHO	SETSWANA
TRADE FICTION	R 884,519	R 192,360	R 27,269	R 34,576	R 29,162
TRADE NON-FICTION	R 6,279,970	R 4,175,803	R 1,146,226	R 1,351,369	R 1,465,245
EDUCATIONAL: SCHOOLS	R 56,520,713	R 42,010,090	R 17,430,590	R 10,356,500	R 15,277,234
EDUCATIONAL FET COLLEGES	R 0	R 2,000	R 0	R 500	R 0
EDUCATIONAL ABET	R 56,576	R 6,796	R 259	R 1,871	R 266
ACADEMIC TEXTBOOKS	R 34,442	R 48,216	R 0	R 0	R 0
PROFESSIONAL	R 0	R 0	R 0	R 0	R 0
SCHOLARLY BOOKS	R 0	R 0	R 0	R 0	R 0
TOTAL	**R 63,776,220**	**R 46,435,265**	**R 18,604,344**	**R 11,744,816**	**R 16,771,907**

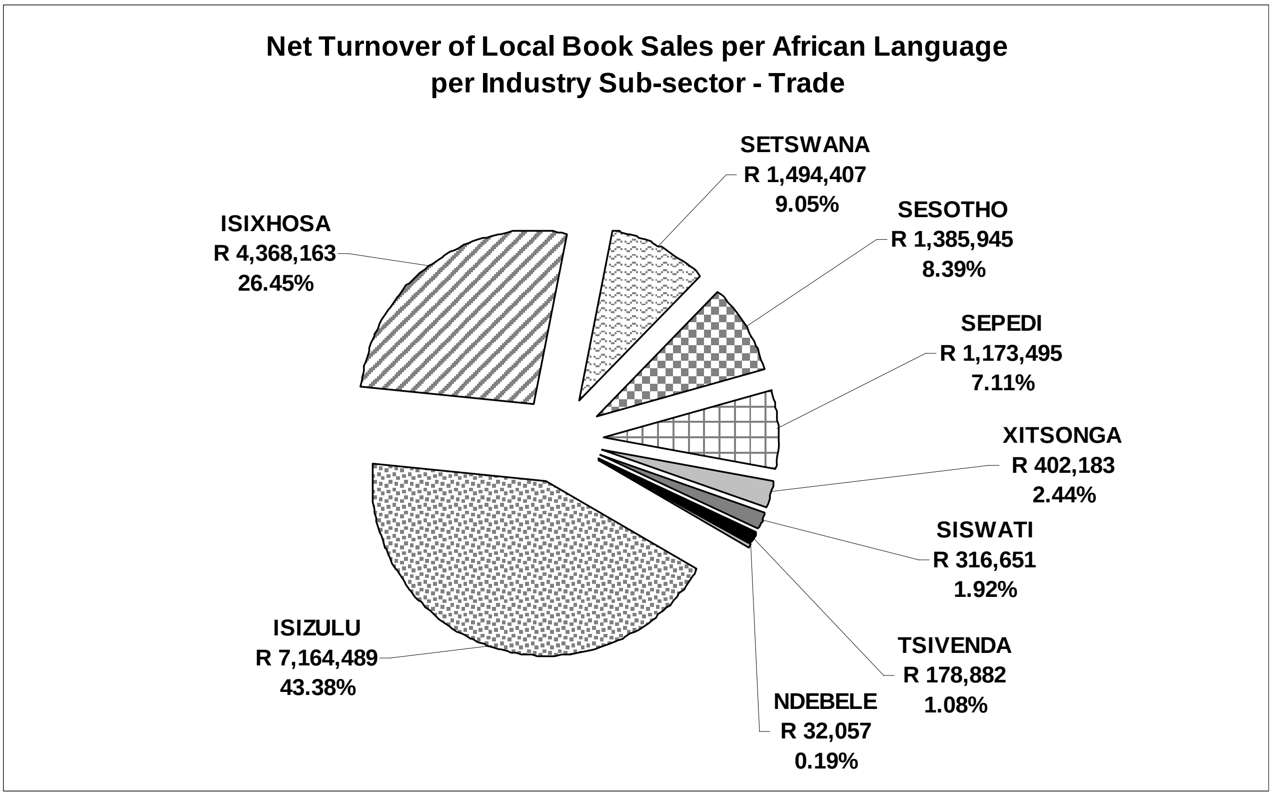
	NDEBELE	XITSONGA	TSIVENDA	SISWATI
TRADE FICTION	R 20,586	R 19,375	R 18,386	R 16,912
TRADE NON-FICTION	R 11,471	R 382,808	R 160,496	R 299,739
EDUCATIONAL: SCHOOLS	R 2,548,952	R 4,999,243	R 1,965,220	R 7,548,528
EDUCATIONAL FET COLLEGES	R 0	R 0	R 0	R 0
EDUCATIONAL ABET	R 7	R 14	R 218	R 21
ACADEMIC TEXTBOOKS	R 0	R 0	R 0	R 0
PROFESSIONAL	R 0	R 0	R 0	R 0
SCHOLARLY BOOKS	R 0	R 0	R 0	R 0
TOTAL	**R 2,581,016**	**R 5,401,440**	**R 2,144,320**	**R 7,865,200**

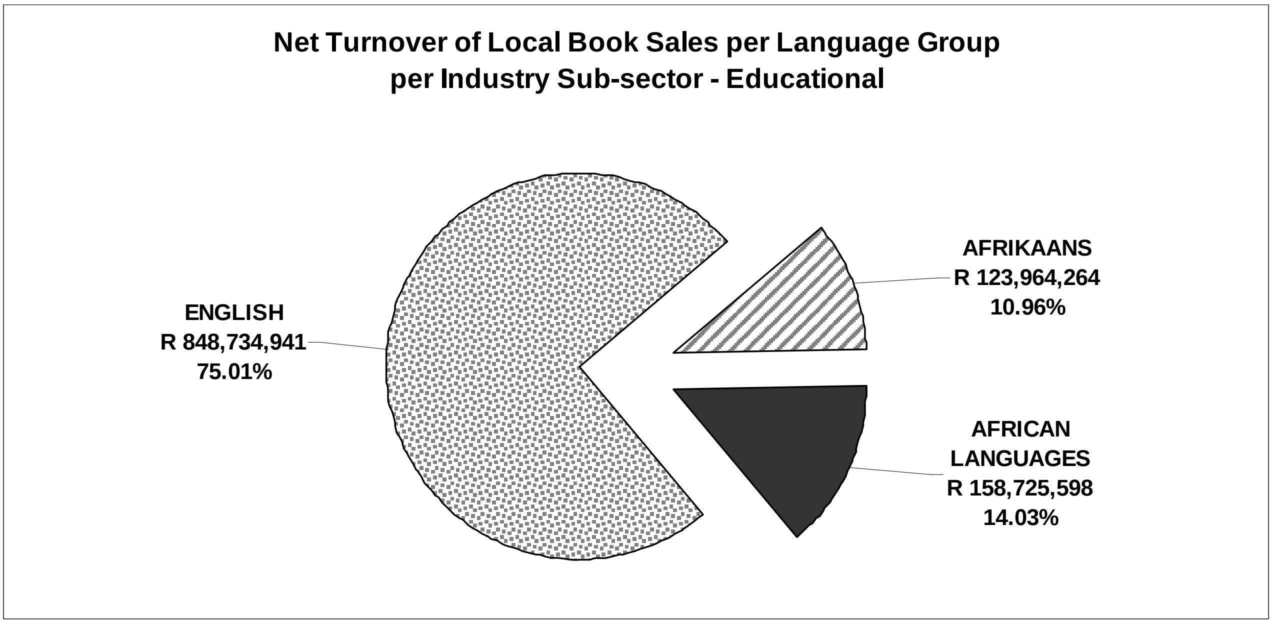


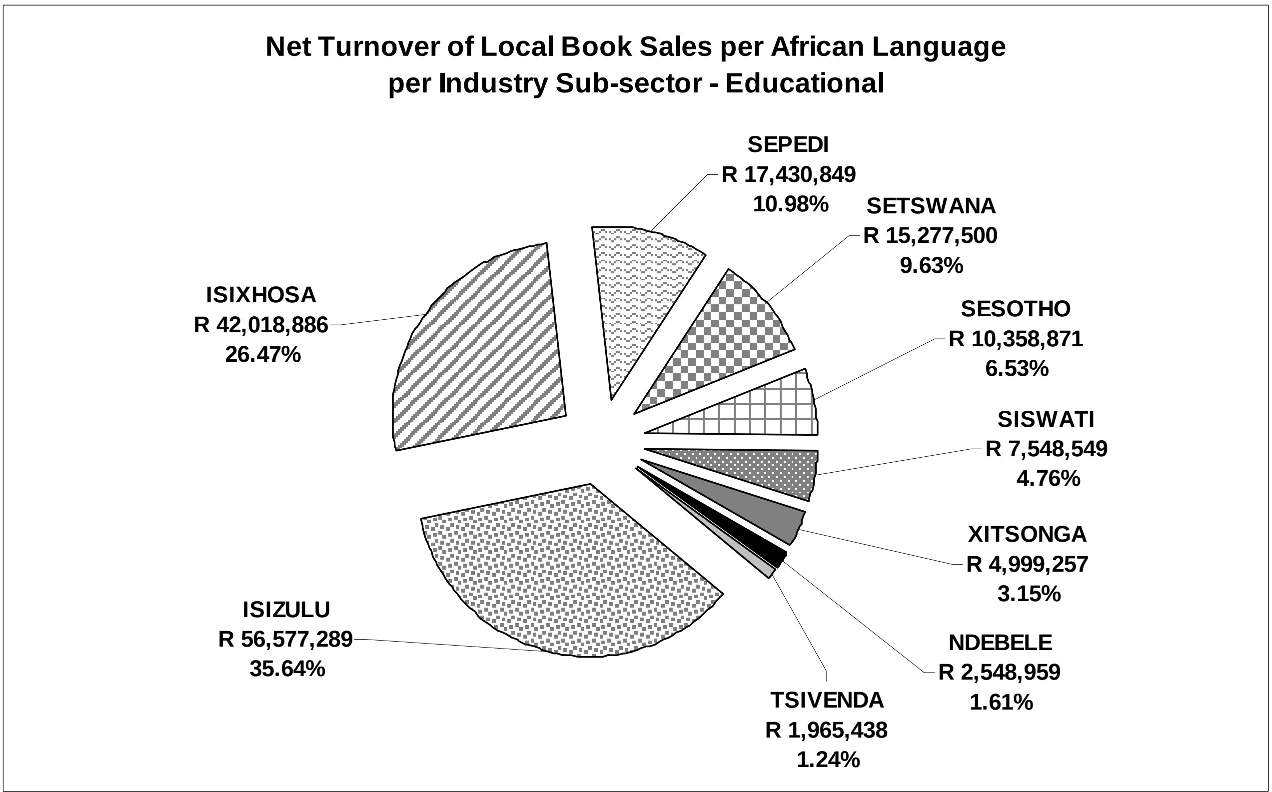
Notes

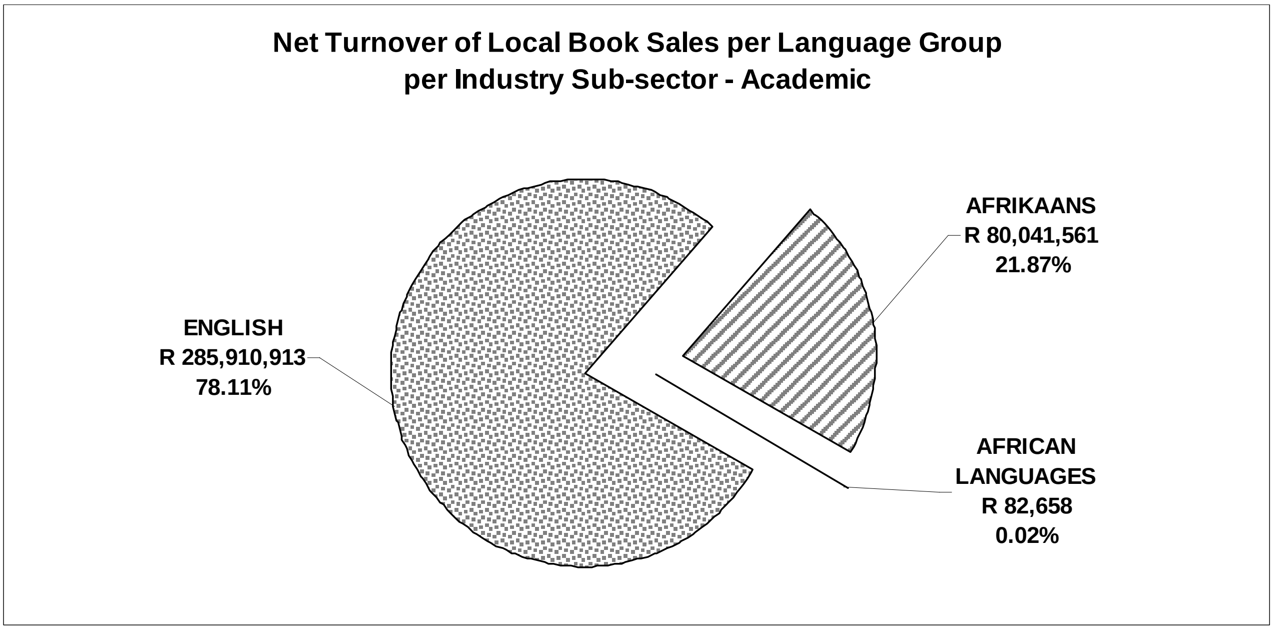
- Not all publishers were able to give a turnover breakdown per language. The Total Net Turnover of local books (excluding academic journals) amounted to R2,128,728,346, while the reported Net Turnover of sales per language was R1,856,745,012. The reporting per language represented 87.22% of total local sales, and was deemed to be representative of local publishing.
- The local publishing industry was dominated by the sale of English-language books, which account for 71.92% of the Net Turnover of reported sales across all sub-sectors.
- Books published in Afrikaans accounted for 18.63% of reported book sales by value. Afrikaans was the only language where the Net Turnover of trade books exceeded that of educational books.
- Books published in the nine African languages combined accounted for 9.44% of Net Turnover, with isiZulu, isiXhosa, Sepedi and Setswana contributing most to sales. The sale of Bibles made up the majority of the recorded trade (non-fiction) book sales.
- **It is not possible to correlate the Total Net Turnover of local book sales (see the three pie charts on pages 20 and 21) with the reported Net Turnover of sales per language and sub-sector (as represented by the following five pie graphs) because some publishers were not able to give a breakdown per language and sub-sector.**


Net Turnover of Local Book Sales per Language Group
per Industry Sub-sector - Trade
AFRIKAANS
R 141,973,683
39.52%
ENGLISH
R 200,795,122
55.89%
AFRICAN
LANGUAGES
R 16,516,272
4.60%


Net Turnover of Local Book Sales per African Language
per Industry Sub-sector - Trade
SETSWANA
R 1,494,407
9.05%
ISIXHOSA
R 4,368,163
26.45%
SESOTHO
R 1,385,945
8.39%
SEPEDI
R 1,173,495
7.11%
XITSONGA
R 402,183
2.44%
SISWATI
R 316,651
1.92%
ISIZULU
R 7,164,489
43.38%
TSIVENDA
R 178,882
1.08%
NDEBELE
R 32,057
0.19%


Net Turnover of Local Book Sales per Language Group
per Industry Sub-sector - Educational
AFRIKAANS
R 123,964,264
10.96%
ENGLISH
R 848,734,941
75.01%
AFRICAN
LANGUAGES
R 158,725,598
14.03%


Net Turnover of Local Book Sales per African Language
per Industry Sub-sector - Educational
SEPEDI
R 17,430,849
10.98%
SETSWANA
R 15,277,500
9.63%
ISIXHOSA
R 42,018,886
26.47%
SESOTHO
R 10,358,871
6.53%
SISWATI
R 7,548,549
4.76%
XITSONGA
R 4,999,257
3.15%
ISIZULU
R 56,577,289
35.64%
NDEBELE
R 2,548,959
1.61%
TSIVENDA
R 1,965,438
1.24%



Notes

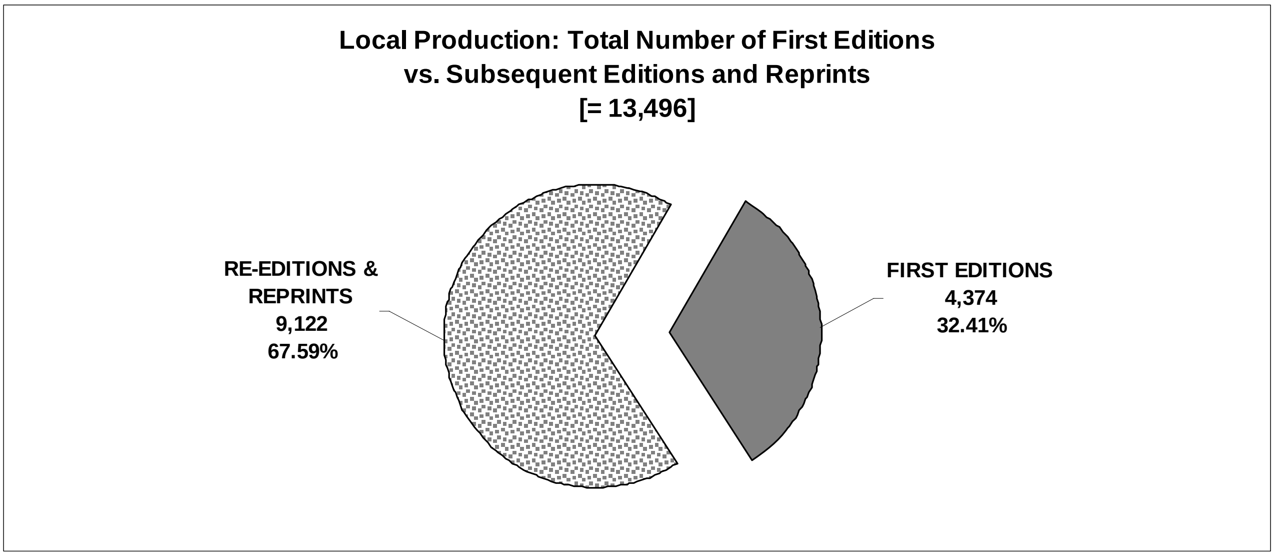
- As far as the trade sector was concerned, it is noteworthy that the Afrikaans language community provided a substantial support base for sales of books in this language. Twelve years into a democratic South Africa, however, African languages still lacked far behind.
- The educational sector was dominated by local English language books, while Afrikaans titles had a smaller market share than the combined sales of books in African languages.
- The academic sector reflected a viable niche for academic books in Afrikaans. The dominance of English academic titles is linked to the dominance of English as language of instruction on tertiary level.

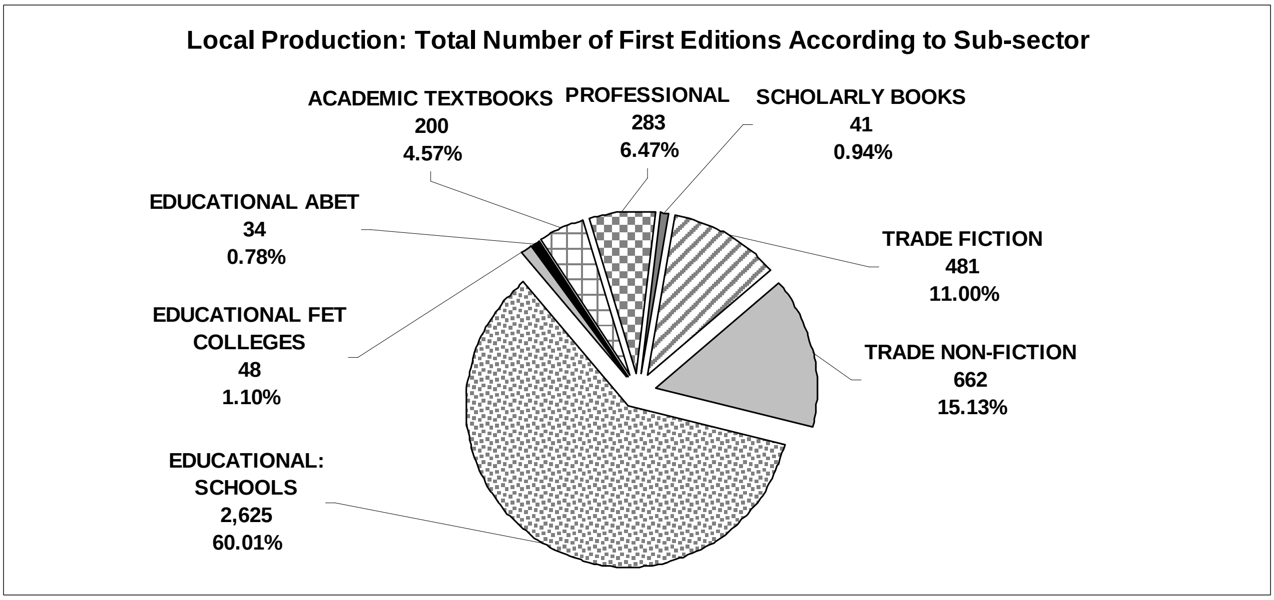
PRODUCTION PROFILE

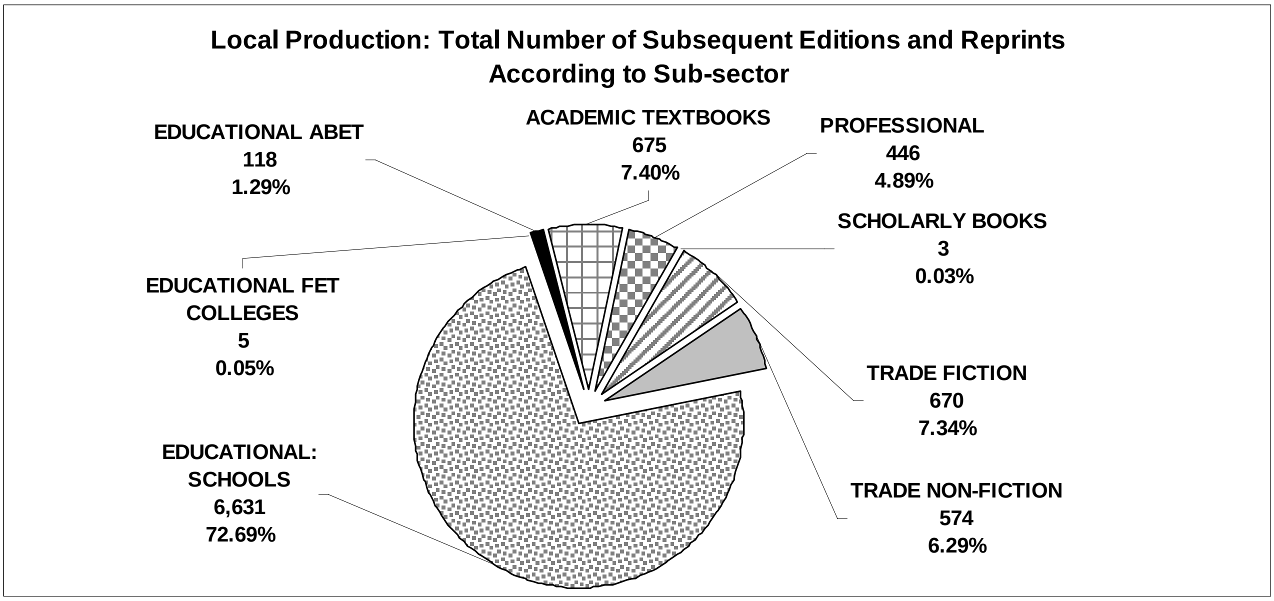
*The number of **locally published titles** by all participating publishers between 1 January and 31 December 2006.*

First Editions	Subsequent Editions & Reprints	Total
4 374	9 122	13 496

Local Production of First Editions versus Subsequent Editions & Reprints According to Sub-sector







Notes

- The expanded sample impacted notably on the reported number of titles in the total production profile, and specifically on the number of titles in the academic sector.
- The annual local book production was dominated by subsequent editions and reprints.
- Local educational titles dominated the production profile of both first editions and subsequent editions/reprints.
- Non-fiction trade titles (first editions) were prominent in comparison with fiction trade titles. There were more subsequent editions and reprints (670 titles) of trade fiction titles than first editions (481 titles).
- More academic books (textbooks, professional books and scholarly books) were re-issued (1124 titles) than newly published (524 titles).

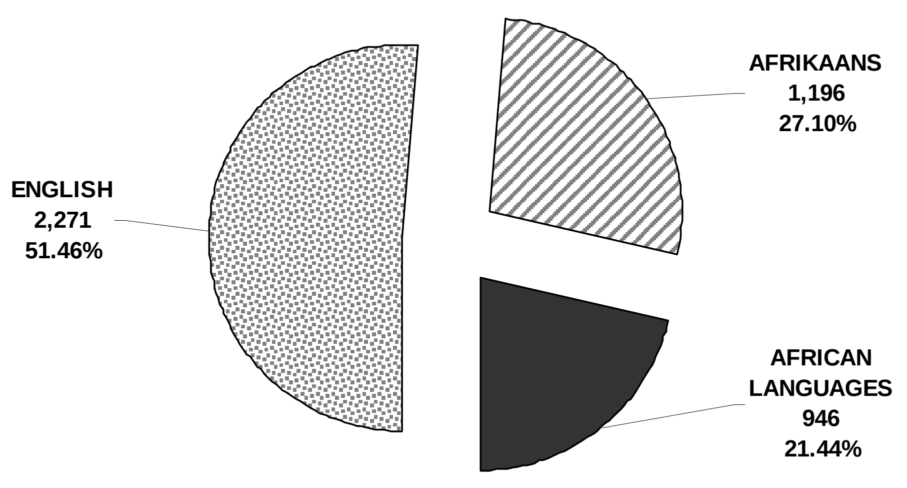
Total Title Production (incl. New Editions, excl. Subsequent Editions & Reprints)
According to Language and Sub-sector

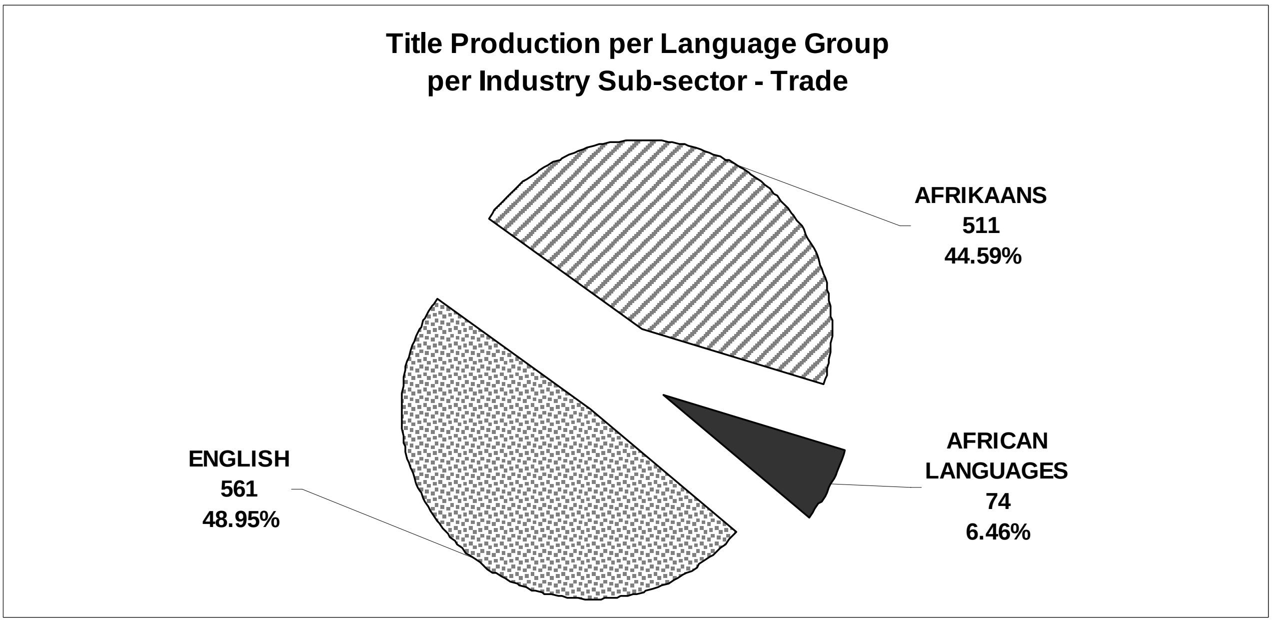
	TOTAL	ENGLISH	AFRIKAANS	ISIZULU	ISIXHOSA	SEPEDI	SESOTHO	SETSWANA	NDEBELE	XITSONGA	TSIVENDA	SISWATI
TRADE FICTION	450	183	214	16	9	4	4	4	4	4	4	4
TRADE NON-FICTION	696	378	297	5	3	2	2	4	1	1	1	2
EDUCATIONAL SCHOOLS	2,648	1,138	642	179	181	111	108	91	50	56	48	44
EDUCATIONAL FET COLLEGES	66	66	0	0	0	0	0	0	0	0	0	0
EDUCATIONAL ABET	24	20	0	2	1	0	1	0	0	0	0	0
ACADEMIC TEXTBOOKS	211	180	31	0	0	0	0	0	0	0	0	0
PROFESSIONAL	277	265	12	0	0	0	0	0	0	0	0	0
SCHOLARLY BOOKS	41	41	0	0	0	0	0	0	0	0	0	0
TOTAL	**4,413**	**2,271**	**1,196**	**202**	**194**	**117**	**115**	**99**	**55**	**61**	**53**	**50**

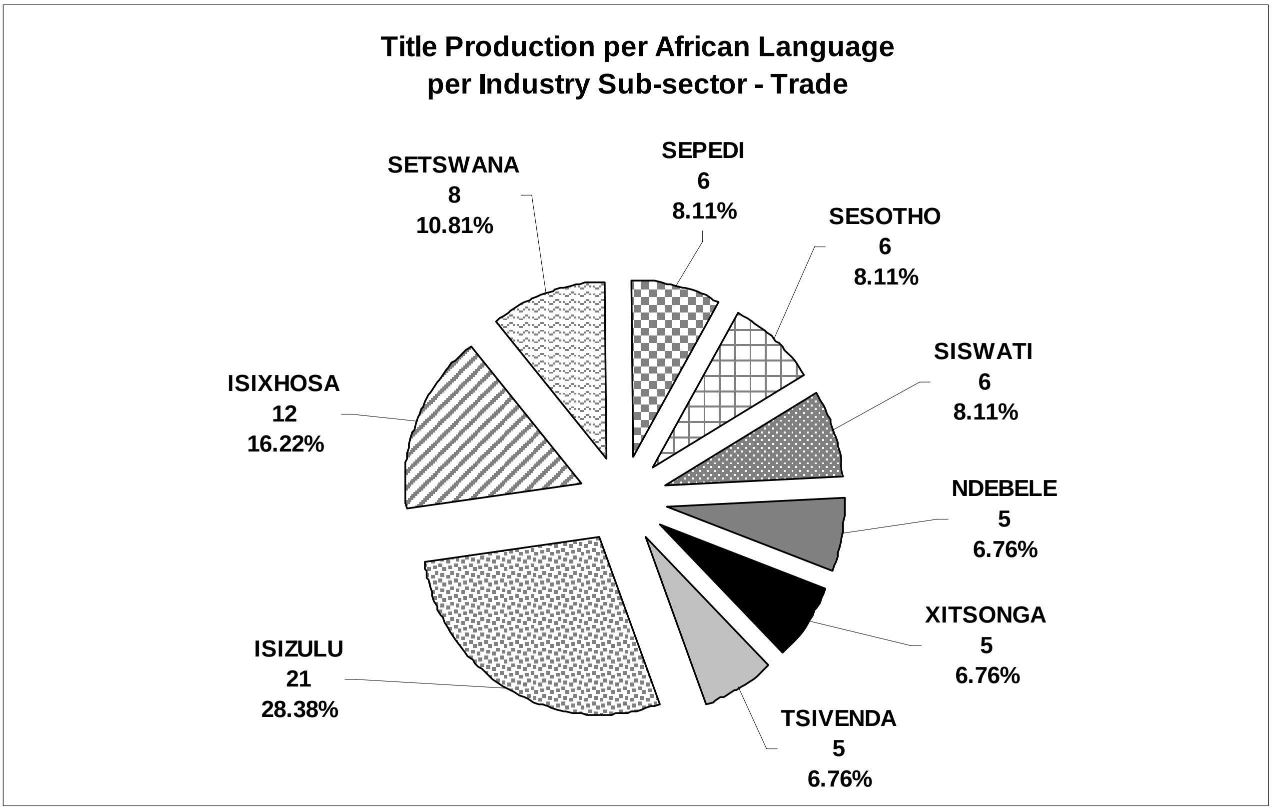
Note

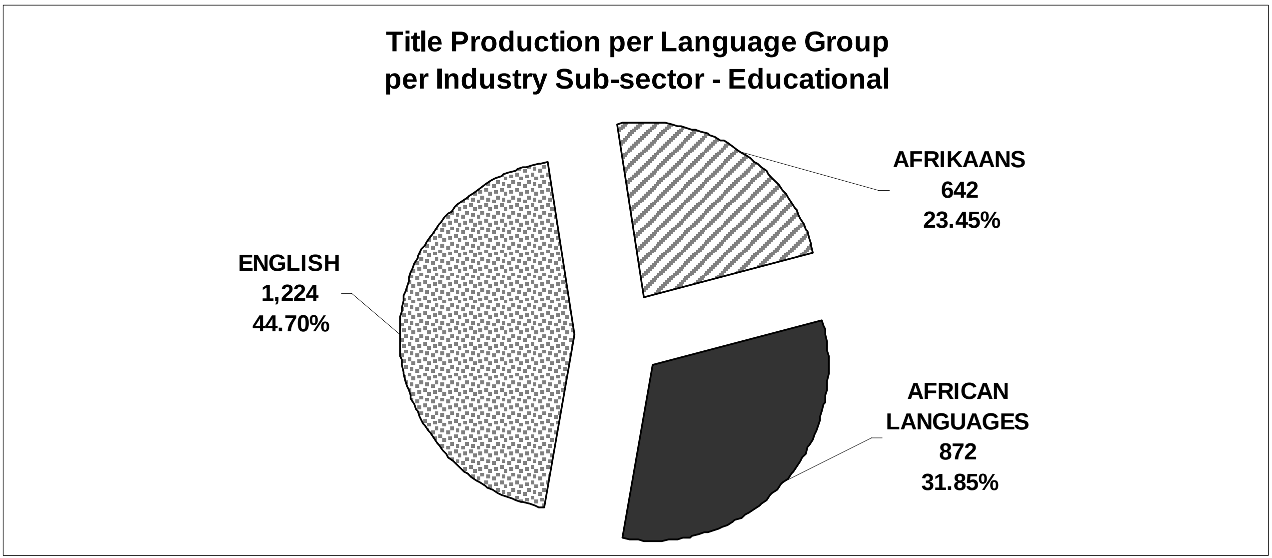
- Not all publishers were able to provide a breakdown per language. Some multi-language editions were reported under more than one language. The total production figures according to language can therefore not be directly compared with those reported on pages 32 and 33.

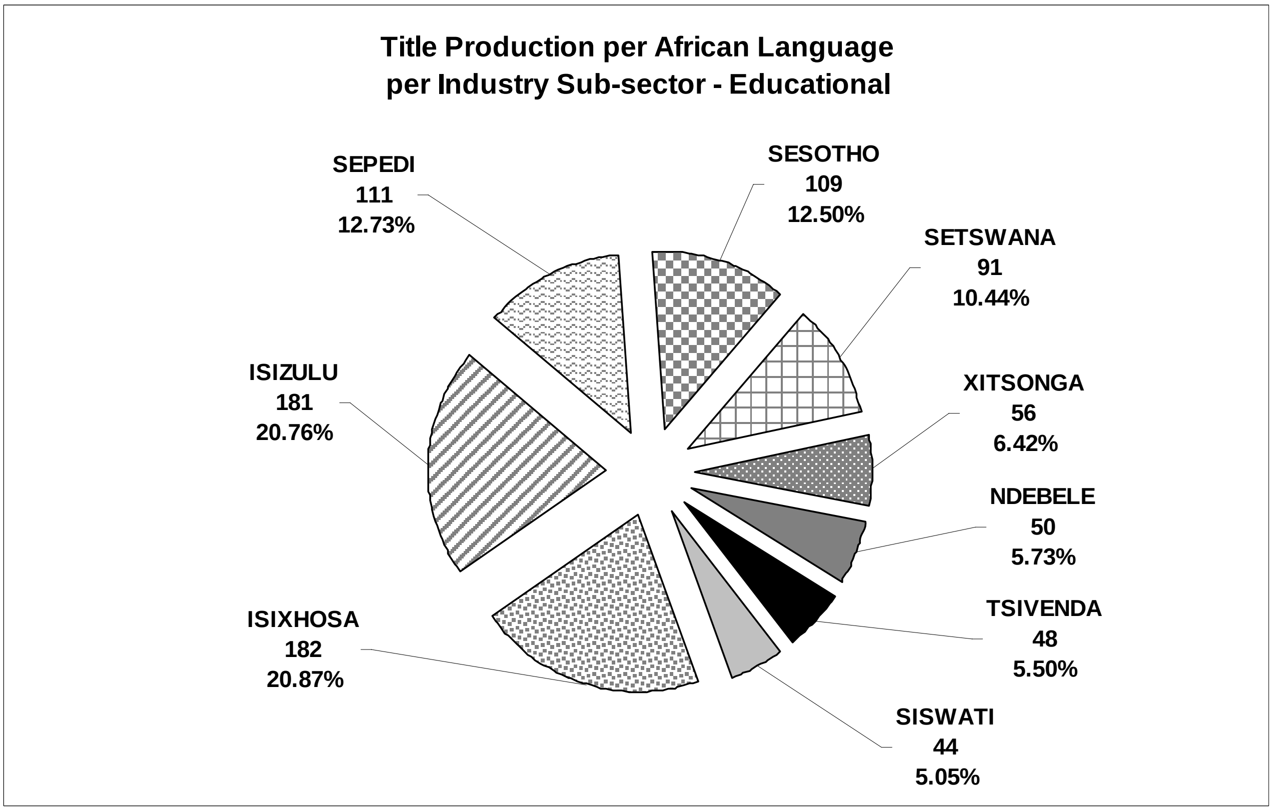
Total Title Production per Language Group

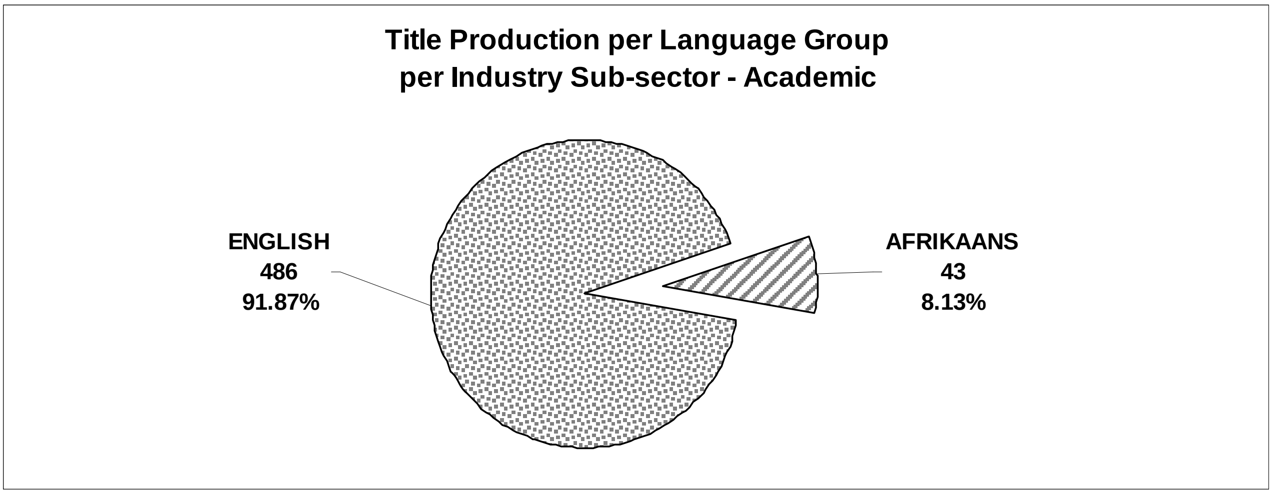



Title Production per Language Group
per Industry Sub-sector - Trade
AFRIKAANS
511
44.59%
AFRICAN
LANGUAGES
74
6.46%
ENGLISH
561
48.95%


Title Production per African Language
per Industry Sub-sector - Trade
SETSWANA
8
10.81%
SEPEDI
6
8.11%
SESOTHO
6
8.11%
SISWATI
6
8.11%
ISIXHOSA
12
16.22%
NDEBELE
5
6.76%
XITSONGA
5
6.76%
ISIZULU
21
28.38%
TSIVENDA
5
6.76%


Title Production per Language Group
per Industry Sub-sector - Educational
AFRIKAANS
642
23.45%
ENGLISH
1,224
44.70%
AFRICAN
LANGUAGES
872
31.85%


Title Production per African Language
per Industry Sub-sector - Educational
SEPEDI
111
12.73%
SESOTHO
109
12.50%
SETSWANA
91
10.44%
ISIZULU
181
20.76%
XITSONGA
56
6.42%
NDEBELE
50
5.73%
ISIXHOSA
182
20.87%
TSIVENDA
48
5.50%
SISWATI
44
5.05%



Note

- The trends of title production per language group in relation to sub-sectors echoed that of Net Turnover per language group in relation to the three sub-sectors. (See pages 29 to 31.)

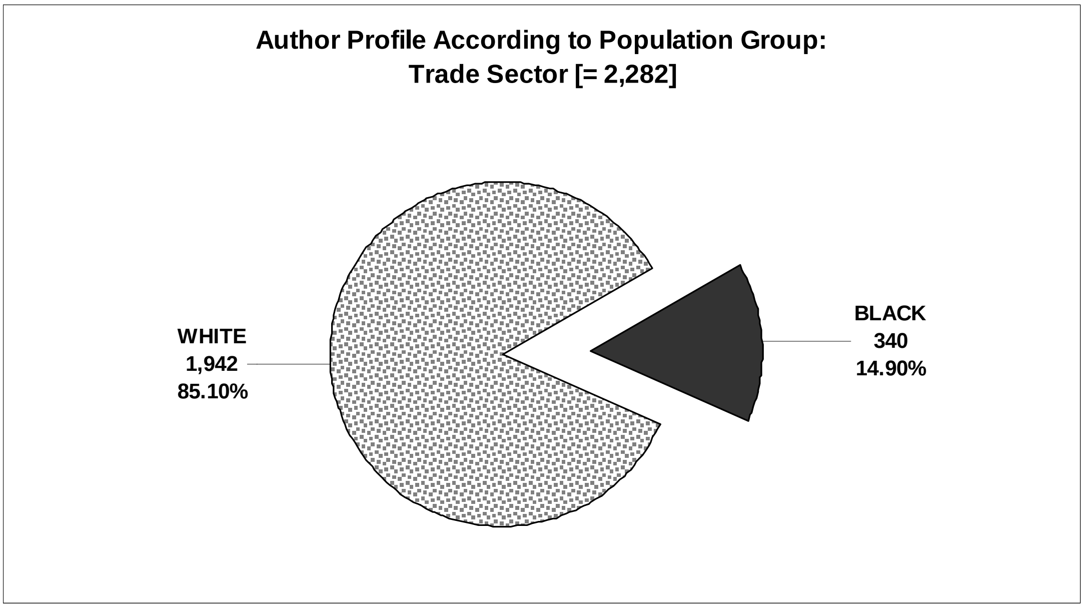
AUTHOR PROFILE

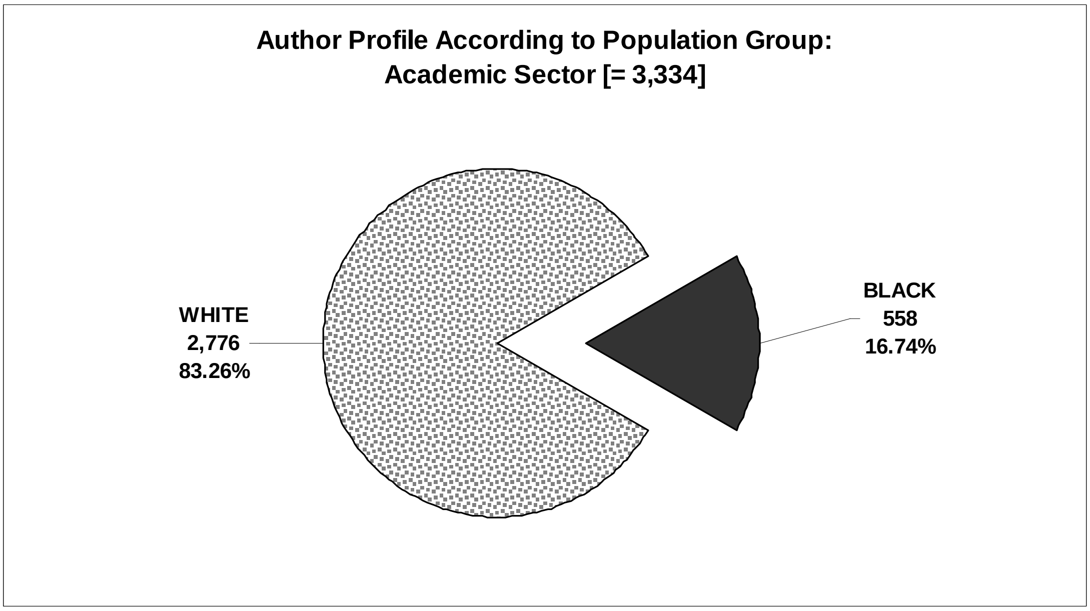
*Analysis of number of **authors / other parties** receiving royalties from all participating publishers between 1 January and 31 December 2006.*

Total Number of Authors / Other Parties Receiving Royalties

Authors Receiving Royalties	Other Parties Receiving Royalties	Total
15,608	920	16,528

Author Profile According to Population Group and Sub-sector





Notes

- The expanded participant pool impacted notably on the total number of authors reported. It must be noted, however, that the same author could have been published by various publishers and that the "author pool" can only be accurately established by means of constructing a nation-wide author database.
- In the educational sector, the largest local publishing sector and the one in which equity has been pursued most actively, a breakdown of the ratio black versus white authors could not be statistically established since one large educational publisher did not provide the required breakdown according to population groups.
- The ratio white versus black authors were unrepresentative of the population profile in the trade sector (14.90% black versus 85.10% white) and the academic sector (16.74% black versus 83.26% white).

ROYALTY PROFILE

Average % Royalty on Net Turnover According to Sub-sector and Publishers' Category

	Small	**Medium**	**Large**
Trade	4/7 publishers	6/18 publishers	9/16 publishers
	AVG1 = 10.09%	AVG1 = 9.11%	AVG1 = 12.59%
	AVG2 = 10.77%	AVG2 = 11.30%	AVG2 = 12.67%
	From 5.49% to 13.90%	From 5.69% to 15.00%	From 9.50% to 15.10%
Educational	4/7 publishers	4/18 publishers	10/16 publishers
	AVG1 = 5.17%	AVG1 = 11.78%	AVG1 = 16.63%
	AVG2 = 8.93%	AVG2 = 13.35%	AVG2 = 11.99%
	From 1.50% to 17.15%	From 8.21% to 15.20%	From 7.00% to 15.00%
Academic	2/7 publishers	2/18 publishers	6/16 publishers
	AVG1 = 5.75%	AVG1 = 17.93%	AVG1 = 9.93%
	AVG2 = 16.90%	AVG2 = 17.19%	AVG2 = 12.57%
	From 13.90% to 19.90%	From 16.22% to 18.15%	From 7.00% to 19.50%

Notes

- Not all recorded sales were subjected to royalty payments. This was due to the fact that some survey participants recorded turnover on distribution of products, which were published by other publishers who were responsible for the payment of royalties. The sales of all such cases were eliminated from the total sales. Total local book sales turnover (excluding journals) was R2,133,650,542 (Rp). Total royalty-related turnover was R2,096,537,144 (Rq). Therefore the royalty profile is 98.26% representative (Rq/Rp) of total local book sales turnover.
- AVG1 = The average royalty percentage per publishers' category and sub-sector calculated as a percentage of the rand value of royalties paid out based on royalty-related turnover.
- AVG2 = The average royalty percentage per publishers' category and sub-sector calculated as an average percentage of the range.

Rand Value of Royalty as % of Net Turnover of Sales of Local Product
According to Publishers' Category

	% of Net Turnover	Range	Rand Value
Small (7/7 publishers)	8.43%	From 1.50% to 17.15%	R763,734
Medium (13/18 publishers)	10.96%	From 5.69% to 18.15%	R13,580,666
Large (16/16 publishers)	14.94%	From 7.00% to 19.50%	R293,315,985
	Average for participating publishers 14.67%		**Total for participating publishers R307,660,385**

Notes

- The average royalty percentages recorded in this survey differed significantly from those of the past because of the difference in the sample.
- Some participants pay significantly more and others significantly less royalties as a percentage of their Net Turnover than those of previous surveys.
- The variation in the range between the minimum and maximum average royalty percentage paid by specific companies was significant. Therefore the average royalty percentage per publishers' category and sub-sector is a theoretical average and must be interpreted within the parameters of the range.

FINAL REMARKS

- Notwithstanding the fact that the report does not contain data from all 99 entities that formed the core list of the 2006 survey, feedback from the 13 medium (bands F-J) and 16 large entities (K & L bands) included in the report provides a representative perspective on the industry.
- Based on the reported Total Net Turnover of 36 entities and the estimated maximum Total Net Turnover of the remaining 63 entities the reported turnover profile represents 92.95% of the sample.
- The expansion of the sample base and the inclusion of non-PASA entities of the 2006 survey complicate direct year-on-year comparisons with previous surveys.
- Broad trends (including comparable growth patterns based on the feedback of 25 entities that participated in the 2004, 2005 and 2006 surveys) are tabled in a separate *Broad Trends Report*.
- The Research Team trusts that all PASA members and other participants will be convinced of the usefulness of the analysis and that the participant pool will expand in the future.

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Willem Struik

September 2007