SOUTH AFRICAN
BOOK DEVELOPMENT COUNCIL

**The research was funded by the Department of Arts and Culture (DAC)**
**through the South African Book Development Council (SABDC)**
**and by the Publishers' Association of South Africa (PASA)**

# *ANNUAL BOOK PUBLISHING INDUSTRY SURVEY REPORT 2008*

**NOVEMBER 2009**

UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

**SCHOOL OF INFORMATION TECHNOLOGY**
**DEPARTMENT OF INFORMATION SCIENCE**
**PUBLISHING STUDIES**

**Research Team**

**Francis Galloway**
**Willem Struik**

# Contents

## Appendices

## List of figures



 

**APPENDICES**

# 1 General issues

## 1.1 Background

Various role-players have noted the importance of statistical information on the South African book industry. Apart from the vested interest of publishers and the book trade, the South African government through representative bodies such as the Publishers' Association of South Africa (PASA) and the South African Book Development Council (SABDC) requires statistical information on the industry. 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 publishing industry in the form of a snapshot survey. 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 and 2007). A central database, compiled of the information collected during the surveys, has been developed and it serves as a tool to track and monitor changes along the book value chain over a period of time.

## 1.2 Process

The collection of data that is statistically representative remains a challenge. As far as PASA members are concerned, the large publishers all participated in the current survey and therefore the data is statistically representative of this particular cross-section, but the response rate of small publishers is still unsatisfactory. One of the reasons is that the small publishers do not have systems in place to assemble their data in the detailed manner that is increasingly required by the annual survey. For the past three years a number of large and medium-sized publishers, distributors and local market agents that are not members of PASA were invited to participate in the annual survey, in order to enhance the representative nature of the results. (See **Appendix 1** for detail on the process of data collection, data capturing, and data analysis pertaining to the 2008 survey.)

## 1.3 Scope

The total South African book market has been growing at a faster rate than the growth rate of the book publishing industry reflected in the annual surveys. This trend is due to the fact that overseas publishers, book distributors, specialist library suppliers and Internet booksellers also serve the local market, but their contribution has not been reflected in the surveys. This report is the first that include these direct importers. Although none of them reported on their net turnover values, these could be deducted from other existing sources and used in estimating the value of the total market for new books in South Africa. (**Appendix 2** provides detail about the various categories of market suppliers.)

A core list of entities targeted for the 2008 survey was compiled, based on specific criteria (see **Appendix 3**). Data was collected at business unit level rather than holding company level in order to link feedback to specific sub-sectors (see **Appendix 4**). The product category, religious books, was added to the trade sub-sector in order to report separately on the data collected. Since only two participants are engaged in the publication of academic journals we do not report on this product category in order to protect the confidential nature of the data.

It became clear from previous surveys that almost all local publishers focus their publishing activities in one of the three sub-sectors viz. trade, education or academic, to the extent that their chosen field of publishing generates more than 80% of their total income. This trend also applies to the book distributors, albeit to a lesser extent. Role players in the different sub-sectors are also experiencing different trade cycles in terms of production, employment and total net turnover. Therefore the collected data is also aggregated according to dominant sub-sector, to allow analyses for each of these sub-sectors.

## 1.4 Focus

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

- Supplier category, marketing and sales functions, distribution arrangements;
- Turnover profile according to activities and then specifically broken down into turnover of local product according to sub-sector and language; turnover of imported

product, according to sub-sector; turnover according to type of sales outlet; and educational turnover per province;

- Production profile according to number of new titles and subsequent editions versus reprints as well as according to language;
- Author profile according to population group and sub-sector;
- Royalty profile;
- Ownership profile; and
- Employment profile.

## 1.5 Problem areas

*Direct importation of imported books*

None of the indent import agencies could provide accurate net turnover values, since their overseas principals account for such sales in other currencies. The research team acknowledges the considerable contribution made by these suppliers to the local book market, but their data cannot be incorporated in the report.

*Local distribution of imported books*

The research team is aware of circumstances under which reported sales figures could be a duplication of figures reported elsewhere. In all cases of doubt, such figures are omitted from the aggregated data. Examples of such circumstance include:

- Split agencies: More than one distributor is listed per imprint, depending on the nature of the product.
- Split distribution agreements: Distributors are appointed for certain segments of the market, whilst the publishers sell directly to other segments.
- Agency transfers: More than one distributor reports sales of an imprint, because the publisher changed its agency agreement during the course of the year.

*Locally outsourced distribution of local product*

The sales reported by local distributors are carefully screened to avoid counting the figures twice in cases where the represented publishers report directly. In such cases only the production and employment statistics are used.

*Royalties*

The following circumstances are reported and taken into account during the analyses of the royalty statistics.

- Some titles are published on a contract basis, with a fixed royalty fee been paid in previous years.
- Advance royalties paid during 2008 for future sales, the offset of past advances against current year sales, and royalties written off as unrecoverable cannot be accounted for in the survey report.
- A number of co-publications of South African publishers with overseas principals are reported on as local publications, but carry no separate royalties on sales, as these are included in the purchase price.
- A number of academic books are published on a profit-sharing basis not linked directly to sales volumes or values. This also applies to some self-publishers in the trade sub-sector.

*Incomplete questionnaires*

Not all participants could or would complete all sections of the questionnaire. Great care should therefore be taken when relating the data of one section to that of another. In order to indicate the representative nature of each section of the questionnaire, the number of participants who completed that particular section and their combined net turnover is indicated.

## 1.6 Comparison with previous surveys

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

As soon as this report has been accepted by the Executive Committee of PASA a *Broad Trends Report* will be compiled, based on a like-for-like comparison of all the entities that participated in both the 2007 and the 2008 surveys, in order to highlight the patterns or trends that manifested over these two years.

## 2 The core list

A core list was drawn up to include all the companies that were targeted to participate in the 2008 survey. The various sources utilised to identify potential companies as well as the criteria applied to select companies (PASA members as well as entities that are not members of PASA) for the core list are highlighted and motivated in **Appendix 3.**

**Fig. 2.1 Number of companies identified, number of companies included and number of participants according to size**

| SIZE CATEGORY | IDENTIFIED | INCLUDED | PARTICIPATED |
|---|---|---|---|
| LARGE | 19 | 19 | 18 |
| MEDIUM | 32 | 32 | 20 |
| SMALL | 277 | 45 | 13 |
| **ALL** | **328** | **96** | **51** |

**Notes**

- 18 of the 19 identified large companies participated. The one large company that did not participate is an indent import agency that does not have access to the required sales records. The participation rate for large companies is therefore 94.73%.
- 20 of the 32 identified medium-sized companies participated. 7 of the 12 that did not participate are indent import agencies that do not have access to the required sales records. The participation rate of medium companies is 62.50%.
- 45 of the identified 277 small companies were added to the core list and 13 of these participated in the survey. The participation rate of small companies is 28.89%.

**Fig. 2.2 Number of companies identified, number of companies included and number of participants according to sub-sector**

| SUB-SECTOR | IDENTIFIED | INCLUDED | PARTICIPATED |
|---|---|---|---|
| TRADE | 124 | 52 | 27 |
| EDUCATION | 107 | 27 | 15 |
| ACADEMIC | 97 | 17 | 9 |
| **ALL** | **328** | **96** | **51** |

**Notes**

- Nearly 50% (52 out of 124) of the identified trade suppliers were included in the core list, and 27 of these participated in the survey. The participation rate of trade suppliers is 51.92%.
- 27 of the 107 identified educational book suppliers were included in the core list, and 15 participated in the survey. A few very large suppliers dominate this sub-sector, while many small ones serve narrowly focussed niches. The participation rate of educational suppliers is 55.56%.
- 17 of the identified 97 academic book suppliers were included in the core list, and 9 of these participated. This sub-sector is characterised by many small direct suppliers from overseas that were excluded from the core list. The participation rate of academic suppliers is 52.94%.

**Fig. 2.3 Number of companies identified, number of companies included and number of participants according to supplier category**

| SUPPLIER CATEGORY | IDENTIFIED | INCLUDED | PARTICIPATED |
|---|---|---|---|
| LOCAL PUBLISHER ONLY | 208 | 52 | 23 |
| PUBLISHER AND DISTRIBUTOR | 21 | 21 | 21 |
| LOCAL DISTRIBUTOR ONLY | 21 | 16 | 7 |
| INDENT IMPORT AGENCY | 8 | 7 | 0 |
| OVERSEAS DIRECT SUPPLIER | 70 | 0 | 0 |
| **ALL** | **328** | **96** | **51** |

**Notes**

- 21 of the large local publishers also distribute books on behalf of overseas publishers within their main industry sub-sector and all these companies are included in the core list. All of them participated in the survey. The participation rate of this supplier category is 100%.
- Many of the small local publishers do not achieve the estimated R5 million annual turnover threshold and were not included in the core list. All PASA members were, however, initially invited to participate. Those that responded were included in the core list and 23 participated in the survey. The participation rate of this supplier category is 44.23%.

- 16 of the 21 identified companies that act only as local distributors were included in the core list, and 7 of them participated in the survey. The participation rate of this category is 43.75%.
- No indent agency participated, and no direct book supplier was included in the core list since they are not regarded as being part of the local book industry.

**Fig. 2.4 Core list of targeted publishers, distributors and indent market agencies**

| | |
|---|---|
| 30 Degrees South | Macmillan South Africa |
| Actua Press | Marumo Publishers |
| AllCopy Publishers | Map Studio |
| Awareness Publishing | Maskew Miller Longman |
| Best Books | McGraw-Hill Educational |
| Bible Society of South Africa | Methodist Publishing House |
| Blue Weaver Marketing & Distribution | Metz Press |
| Book Promotions | Naledi Publishers |
| Briza Publications | Nasou Via Afrika |
| Cambridge University Press | NB Publishers |
| Carpe Diem | New Africa Books |
| Cengage Learning | New Generation Publishers |
| Creative Global Studios | New Readers Publishers |
| CUM | Nutrend Productions |
| Derek Prince Ministries | OBE Publishers |
| Don Nelson Publishers | Oxford University Press Southern Africa |
| Elzevier | Pan Macmillan SA |
| Everybody's Books | Pearson Education South Africa |
| Fantasi Books | Penguin Group (SA) |
| Faradawn | Peter Hyde & Associates |
| Fernwood Press | Phambili Agencies |
| Francolin Publishers | Protea Boekhuis |
| Future Entrepreneurs | PSD Promotions |
| Future Managers | Publitech |
| Galapo Publications | Qualibooks Publishers |
| Hargraves Library Services | Quartet Sales & Marketing |
| Hay House (South Africa) | Random-Struik |
| Heinemann | Reading Matters |
| Hibbard Publishers | Real Books |
| HSE CC | R.N.A. Distributors |
| HSRC Press | Scholastic Inc |
| Ina Paarman | Shuter & Shooter |
| Independent Publishers | Sovereign Media |
| Intersoft | Stimela Publishers |
| Jacana Media | Struik Christian Media |
| Jacklin Enterprises | Study Opportunities |
| John Wiley & Sons | The African Moon Press |

| | |
|---|---|
| Jonathan Ball Publishers | Titles |
| Juta & Company | Troupant Publishers |
| Knowledge Resources | UNISA Press |
| Lannice Snyman | University of KwaZulu-Natal Press |
| LAPA Publishers | Van Schaik Publishers |
| Learning Channel | Visual Publishers |
| Lectio Publishers | Vivlia Publishers & Booksellers |
| LexisNexis Butterworth SA | Wild Dog Press |
| Lippincott, Wilkins & Williams | Wits University Press |
| Lux Verbi-BM | Zytech Publishing |

# 3 The participants

**Fig. 3.1 List of companies that participated in the 2007 and 2008 surveys**

| Company | 2007 | 2008 |
|---|---|---|
| Awareness Publishing | ✓ | ✓ |
| Best Books | ✓ | ✓ |
| Bible Society of South Africa | ✓ | ✓ |
| Book Promotions | ✓ | ✓ |
| Briza Publications | ✓ | ✓ |
| Cambridge University Press | ✓ | ✓ |
| Christian Art / CUM Books | × | ✓ |
| Fantasi Publications | ✓ | ✓ |
| Derek Prince Ministries | × | ✓ |
| Fernwood Press | ✓ | ✓ |
| Francolin Publishers | × | ✓ |
| Future Managers | ✓ | ✓ |
| Hargraves Library Suppliers | × | ✓ |
| Hay House | × | ✓ |
| Heinemann | ✓ | ✓ |
| HSRC Press | ✓ | ✓ |
| Jacana Media | × | ✓ |
| Jonathan Ball Publishers | ✓ | ✓ |
| Juta & Company Limited | ✓ | ✓ |
| LAPA Publishers | ✓ | ✓ |
| Lectio Publishers | × | ✓ |
| LexisNexis Butterworth SA | ✓ | ✓ |
| Lux Verbi Publishers | × | ✓ |
| Macmillan South Africa | ✓ | ✓ |
| Map Studio | ✓ | ✓ |
| Marumo Publishing | × | ✓ |
| Maskew Miller Longman | ✓ | ✓ |
| Metz Press | × | ✓ |
| Naledi Publishers | ✓ | ✓ |
| Nasou/Via Afrika Publishers | ✓ | ✓ |
| NB Publishers | ✓ | ✓ |
| New Readers Publishers | ✓ | ✓ |
| Oxford University Press Southern Africa | ✓ | ✓ |
| Pan Macmillan SA | ✓ | ✓ |
| Pearson Educational SA | ✓ | ✓ |
| Penguin Publishers SA | ✓ | ✓ |
| Phambili Agencies | × | ✓ |
| Protea Boekhuis | ✓ | ✓ |
| PSD Promotions | ✓ | ✓ |
| Random-Struik | ✓ | ✓ |
| Scholastic Inc | × | ✓ |
| Shuter and Shooter Publishers | ✓ | ✓ |
| Stimela Publications | ✓ | ✓ |
| Struik Christian Books | ✓ | ✓ |
| The African Moon Press | × | ✓ |
| Trinity Books | × | ✓ |
| Van Schaik Publishers | ✓ | ✓ |
| Vivlia Publishers & Booksellers | ✓ | ✓ |
| Wild Dog Press | ✓ | ✓ |
| Wits University Press | ✓ | ✓ |
| UNISA Press | ✓ | ✓ |
| **TOTAL QUESTIONNAIRES** | **38** | **51** |

**Notes**

- All the companies, which participated in the 2007 survey, also participated in the 2008 survey.
- 13 companies participated for the first time.

**Fig. 3.2 Participants according to sub-sector**

| | ALL | TRADE GENERAL | TRADE RELIGIOUS | EDUCATION | ACADEMIC |
|---|---|---|---|---|---|
| NUMBER OF PARTICIPANTS | 51 | 22 | 5 | 15 | 19 |
| **MEMBERSHIP CATEGORY** | | | | | |
| PASA MEMBER | 35 | 12 | 1 | 15 | 7 |
| NOT PASA MEMBER | 16 | 10 | 4 | 0 | 2 |
| **SIZE CATEGORY** | | | | | |
| LARGE | 18 | 5 | 1 | 9 | 3 |
| MEDIUM | 20 | 12 | 3 | 3 | 2 |
| SMALL | 13 | 5 | 1 | 3 | 4 |
| **PARTICIPATION CATEGORY** | | | | | |
| PREVIOUS PARTICIPANT | 38 | 15 | 2 | 13 | 8 |
| NEW PARTICIPANT | 13 | 7 | 3 | 2 | 1 |
| **SUPPLIER CATEGORY** | | | | | |
| LOCAL PUBLISHER ONLY | 23 | 11 | 0 | 6 | 6 |
| PUBLISHER & DISTRIBUTOR | 21 | 6 | 4 | 9 | 2 |
| LOCAL DISTRIBUTOR ONLY | 7 | 5 | 1 | 0 | 1 |

**Notes**

- 27 of the 51 participants operate in the trade sub-sector; 22 of them focus on general trade and 5 on religious trade.
- 16 of the 51 participants are not members of PASA. They contribute 22% to the total turnover.
- 5 of the 18 large participants focus on the general trade, 1 on the religious trade, 9 on the education and 3 on the academic sub-sector.
- 5 of the 22 participants that focus on the general trade sub-sector are large companies; 12 are medium and 5 small.
- 10 of the 13 new participants are linked to the trade sub-sector: 7 focus on general trade and 3 on religious trade; 2 of the new participants focus on the education sub-sector; and 1 on the academic sub-sector.
- 23 of the 51 participants distribute their local product only; 21 distribute both their own local product and imported product; and 7 distribute other publishers' product only.

- Large companies dominate the education sub-sector, namely 9 out of 15 participants.

**Fig. 3.3 Participants according to company size**

| COMPANY SIZE | ALL | LARGE | MEDIUM | SMALL |
|---|---|---|---|---|
| **MEMBERSHIP CATEGORY** | | | | |
| PASA MEMBER | 35 | 16 | 12 | 7 |
| NOT PASA MEMBER | 16 | 2 | 8 | 6 |
| **MAIN SUB-SECTOR CATEGORY** | | | | |
| GENERAL TRADE | 22 | 5 | 12 | 5 |
| RELIGIOUS TRADE | 5 | 1 | 3 | 1 |
| EDUCATIONAL | 15 | 9 | 3 | 3 |
| ACADEMIC | 9 | 3 | 2 | 4 |
| **SUPPLIER CATEGORY** | | | | |
| LOCAL PUBLISHER ONLY | 23 | 3 | 11 | 9 |
| LOCAL PUBL AND DISTRIBUTOR | 21 | 15 | 5 | 1 |
| LOCAL DISTRIBUTOR ONLY | 7 | 0 | 4 | 3 |

**Notes**

- 2 of the 16 participants that are not members of PASA are classified as large companies, 8 as medium and 6 as small companies.
- Local publishers tend to be medium (11 out of 12) rather than large (3 out of 23) or small (9 out of 23).
- 15 of the 18 large companies publish their own products and distribute product imported from abroad, while 3 publish their own product only.

**Fig. 3.4 Participants according to supplier category**

| SUPPLIER CATEGORY | ALL | LOCAL PUBLISHERS | PUBLISHERS & DISTRI-BUTORS | LOCAL DISTRI-BUTORS |
|---|---|---|---|---|
| **MEMBERSHIP CATEGORY** | | | | |
| PASA MEMBER | 35 | 16 | 16 | 3 |
| NOT PASA MEMBER | 16 | 7 | 5 | 4 |
| **MAIN SUB-SECTOR** | | | | |
| GENERAL TRADE | 22 | 11 | 6 | 5 |
| RELIGIOUS TRADE | 5 | 0 | 4 | 1 |
| EDUCATIONAL | 15 | 6 | 9 | 0 |
| ACADEMIC | 9 | 6 | 2 | 1 |
| **SIZE CATEGORY** | | | | |
| LARGE | 18 | 3 | 15 | 0 |
| MEDIUM | 20 | 11 | 5 | 4 |
| SMALL | 13 | 9 | 1 | 3 |
| **PARTICIPATION CATEGORY** | | | | |
| PREVIOUS PARTICIPANT | 38 | 18 | 18 | 2 |
| NEW PARTICIPANT | 13 | 5 | 3 | 5 |

**Notes**

- Local publishers that distribute only their own product operate in the trade sub-sector (11 out of 23) rather than the education and the academic sub-sectors (6 out of 23 each).
- Companies that operate both as publishers and distributors of imported product are located in the trade sub-sector (10 out of 21) and the education sub-sector (9 out of 21) rather than the academic sub-sector (2 out of 21).
- Local distributors that distribute only other publishers' product are generally medium or small, and operate in the trade sub-sector (6 out of 7).

# 4 The representative nature of the survey sample

In order to determine the representative nature of the survey sample, the net turnover value of non-participating suppliers (those that are PASA members and those that are not members of PASA) as well as the total net turnover of the industry (per sub-sector) had to be measured/calculated in some way. In **Appendix 5** the methodology applied to estimate the net turnover value of suppliers that did not participate in the 2008 survey is explained. In **Appendix 6** these estimated values are utilized to calculate the total net turnover of the industry as a whole, per sub-sector. In this section the estimated values in Appendix 6 are used to calculate the representative nature of the survey sample in terms of various parameters.

## 4.1 According to the total estimated market value at net turnover value

**Fig. 4.1 Estimated market value according to size and supplier category across sub-sectors**

| VALUES IN R'000 | LOCAL PUBLISHERS | LOCAL PUBLISHERS & DISTRIBUTORS | LOCAL DISTRIBU-TORS | LOCAL IMPORT AGENCIES | OVERSEAS DIRECT SUPPLIERS | ALL SUPPLIER CATEGORIES |
|---|---|---|---|---|---|---|
| **PARTICIPANTS** | | | | | | |
| LARGE | R 206,203 | R 2,837,200 | | | | R 3,043,403 |
| MEDIUM | R 184,258 | R 131,212 | R 83,428 | | | R 398,898 |
| SMALL | R 7,346 | R 3,632 | R 4,697 | | | R 15,675 |
| ALL COMPANIES | R 397,807 | R 2,972,044 | R 88,125 | | | R 3,457,976 |
| **ALL SUPPLIERS** | | | | | | |
| LARGE | R 206,203 | R 2,837,200 | | R 53,286 | | R 3,096,689 |
| MEDIUM | R 240,254 | R 131,212 | R 92,206 | R 107,192 | | R 570,864 |
| SMALL | R 229,897 | R 3,632 | R 33,881 | R 923 | R 143,307 | R 411,640 |
| ALL COMPANIES | R 676,354 | R 2,972,044 | R 126,087 | R 161,401 | R 143,307 | R 4,079,193 |
| **REPRESENTATION** | | | | | | |
| LARGE | 100.00% | 100.00% | | 0.00% | | 98.28% |
| MEDIUM | 76.69% | 100.00% | 90.48% | 0.00% | | 69.88% |
| SMALL | 3.20% | 100.00% | 13.86% | 0.00% | 0.00% | 3.81% |
| ALL COMPANIES | 58.82% | 100.00% | 69.89% | 0.00% | 0.00% | 84.77% |

**Notes**

- The participating large companies contribute R3, 043,403,000 to the estimated R 3,096,689,000 (98.28%) of the total market value of all large companies.

- The participating medium companies contribute R 398,898,000 to the estimated R 570,864,000 (69.88%) of the total market value of all medium companies.
- The participating small companies contribute R 15,675,000 to the estimated R 411,640,000 (3.81%) of the total market value of all small companies.
- The participating large, medium and small companies contribute R 3,457,976,000 to the estimated total market value of R 4,079,193,000 (84.77%) of all large, medium and small companies.
- The participating large, medium and small **local publishers** contribute 58.82% to the estimated total market value of this supplier category.
- The participating large, medium and small **local publishers and distributors** contribute 100% to the estimated total market value of this supplier category.
- The participating large, medium and small **local distributors** contribute 69.89% to the estimated total market value of this supplier category.
- All **local publishers** contribute an estimated R 676,354,000 to the R 4,079,193,000 (16.58%) estimated total market value.
- All **local publishers and distributors** contribute an estimated R 2,972,044,000 to the R 4,079,193,000 (72.85%) estimated total market value.
- All **local distributors** contribute an estimated R 161,401,000 to the R 4,079,193,000 (3.93%) estimated total market value.
- All **local indent import agencies** contribute an estimated R 143,307,000 of the R 4,079,193,000 (3.51%) estimated total market value.

**Fig. 4.2 Estimated market value according to sub-sector: trade**

| TRADE<br><br>VALUES IN R ' 000 | LOCAL PUBLISHERS | LOCAL PUBLISHERS & DISTRIBUTORS | LOCAL DISTRIBU-TORS | LOCAL IMPORT AGENCIES | OVERSEAS DIRECT SUPPLIERS | ALL SUPPLIER CATEGORIES |
|---|---|---|---|---|---|---|
| **PARTICIPANTS** | | | | | | |
| LARGE | R 64,401 | R 713,793 | | | | R 778,194 |
| MEDIUM | R 84,880 | R 98,394 | R 83,428 | | | R 266,702 |
| SMALL | R 2,192 | R 3,632 | R 2,297 | | | R 8,121 |
| ALL COMPANIES | R 151,473 | R 815,819 | R 85,725 | | | R 1,053,017 |
| **ALL SUPPLIERS** | | | | | | |
| LARGE | R 64,401 | R 713,793 | | | | R 778,194 |
| MEDIUM | R 84,880 | R 98,394 | R 92,206 | R 21,532 | | R 297,012 |
| SMALL | R 27,946 | R 3,632 | R 24,186 | R 923 | R 108,095 | R 164,782 |
| ALL COMPANIES | R 177,227 | R 815,819 | R 116,392 | R 22,455 | R 108,095 | R 1,239,988 |
| **REPRESENTATION** | | | | | | |
| LARGE | 100.00% | 100.00% | | | | 100.00% |
| MEDIUM | 100.00% | 100.00% | 90.48% | 0.00% | | 89.80% |
| SMALL | 7.84% | 100.00% | 9.50% | 0.00% | 0.00% | 4.93% |
| ALL COMPANIES | 85.47% | 100.00% | 73.65% | 0.00% | 0.00% | 84.92% |

**Notes**

- The participating large trade companies contribute R 778,194,000 to the estimated R 778,194,000 (100%) total trade market value for large companies.
- The participating medium trade companies contribute R 266,702,000 to the estimated R 297,012,000 (89.80%) total trade market value for medium companies.
- The participating small trade companies contribute R 8,121,000 to the estimated R 164,782,000 (4.93%) total trade market value for small companies.
- The participating large, medium and small trade companies contribute R 1,053,017,000 to the estimated R 1,239,988,000 (84.92%) total trade market value.
- Participating large, medium and small **local trade publishers** contribute 85.47% to the estimated total trade market value of this supplier category.
- Participating large, medium and small **local trade publishers and distributors** contribute 100% to the estimated total trade market value of this supplier category.
- Participating large, medium and small **local trade distributors** contribute 73.65% to the estimated total trade market value of this supplier category.

### Fig. 4.3 Estimated market value according to sub-sector: education

| EDUCATION<br><br>VALUES IN R ' 000 | LOCAL PUBLISHERS | LOCAL PUBLISHERS & DISTRIBUTORS | LOCAL DISTRIBU-TORS | LOCAL IMPORT AGENCIES | OVERSEAS DIRECT SUPPLIERS | ALL SUPPLIER CATEGORIES |
|---|---|---|---|---|---|---|
| **PARTICIPANTS** | | | | | | |
| LARGE | R 53,488 | R 1,689,288 | | | | R 1,742,776 |
| MEDIUM | R 71,620 | R 32,818 | | | | R 104,438 |
| SMALL | R 988 | | | | | R 988 |
| ALL COMPANIES | R 126,096 | R 1,722,106 | | | | R 1,848,202 |
| **ALL SUPPLIERS** | | | | | | |
| LARGE | R 53,488 | R 1,689,288 | | | | R 1,742,776 |
| MEDIUM | R 127,616 | R 32,818 | | | | R 160,434 |
| SMALL | R 158,004 | | R 4,477 | | | R 162,481 |
| ALL COMPANIES | R 339,108 | R 1,722,106 | R 4,477 | | | R 2,065,691 |
| **REPRESENTATION** | | | | | | |
| LARGE | 100.00% | 100.00% | | | | 100.00% |
| MEDIUM | 56.12% | 100.00% | | | | 65.10% |
| SMALL | 0.63% | | 0.00% | | | 0.61% |
| ALL COMPANIES | 37.18% | 100.00% | 0.00% | | | 89.47% |

**Notes**

- The participating large education companies contribute R1, 742,776,000 to the estimated R 1,742,776,000 (100%) total education market value for large companies.
- The participating medium education companies contribute R104, 438,000 to the estimated R 160,434,000 (65.10%) total education market value for medium companies.
- The participating small education companies contribute R 988,000 to the estimated R 162,481,000 (0.61%) total education market value for small companies.
- Participating large, medium and small education companies contribute R 1,848,202,000 to the estimated R 2,065,691,000 (89.47%) total education market value.
- Participating large, medium and small **local education publishers** contribute 37.18% to the estimated total education market value of this supplier category.
- Participating large, medium and small **local education publishers and distributors** contribute 100% to the estimated total education market value of this supplier category.

## Fig. 4.4 Estimated market value according to sub-sector: academic

| ACADEMIC<br><br>VALUES IN R'000 | LOCAL PUBLISHERS | LOCAL PUBLISHERS & DISTRIBUTORS | LOCAL DISTRIBU-TORS | LOCAL IMPORT AGENCIES | OVERSEAS DIRECT SUPPLIERS | ALL SUPPLIER CATEGORIES |
|---|---|---|---|---|---|---|
| **PARTICIPANTS** | | | | | | |
| LARGE | R 88,314 | R 434,119 | | | | R 522,433 |
| MEDIUM | R 27,758 | | | | | R 27,758 |
| SMALL | R 4,166 | | R 2,400 | | | R 6,566 |
| ALL COMPANIES | R 120,238 | R 434,119 | R 2,400 | | | R 556,757 |
| **ALL SUPPLIERS** | | | | | | |
| LARGE | R 88,314 | R 434,119 | | R 53,286 | | R 575,719 |
| MEDIUM | R 27,758 | | | R 85,660 | | R 113,418 |
| SMALL | R 43,947 | | R 5,218 | | R 35,212 | R 84,377 |
| ALL COMPANIES | R 160,019 | R 434,119 | R 5,218 | R 138,946 | R 35,212 | R 773,514 |
| **REPRESENTATION** | | | | | | |
| LARGE | 100.00% | 100.00% | | 0.00% | | 90.74% |
| MEDIUM | 100.00% | | | 0.00% | | 24.47% |
| SMALL | 9.48% | | 45.99% | | 0.00% | 7.78% |
| ALL COMPANIES | 75.14% | 100.00% | 45.99% | 0.00% | 0.00% | 71.98% |

**Notes**

- The participating large academic companies contribute R 522,433,000 to the estimated R 575, 719,000 (90.74%) total academic market value for large companies.
- The participating medium academic companies contribute R 27,758,000 to the estimated R 113,418,000 (21.47%) total academic market value for medium companies.
- The participating small academic companies contribute R 6,566,000 to the estimated R 84,377,000 (7.78%) of the total academic market value for small companies.
- The participating large, medium and small academic companies contribute R 556,757,000 to the estimated R 773,514,000 (71.98%) total academic market value.
- Participating large, medium and small **local academic publishers** contribute 75.14% to the estimated total academic market value of this supplier category.
- Participating **local academic publishers and distributors** contribute 100% to the estimated total academic market value of this supplier category.
- Participating **local academic distributors** contribute 46% to the estimated total academic market value of this supplier category.

## 4.2 According to the estimated total net turnover of the core list

Because of the relative small number of non-participants in certain categories, and to protect the confidentiality of the individual suppliers, only the combined values for all sub-sectors are reported.

**Fig. 4.5 Estimated total net turnover of all core list suppliers**

| ALL SUB-SECTORS x R '000 | LOCAL PUBLISHERS | LOCAL PUBLISHERS & DISTRIBUTORS | LOCAL DISTRI-BUTORS | LOCAL IMPORT AGENCIES | ALL SUPPLIER CATEGORIES |
|---|---|---|---|---|---|
| **PARTICIPANTS** | | | | | |
| NO OF LARGE COMPANIES | 3 | 15 | 0 | 0 | 18 |
| NO OF MEDIUM COMPANIES | 11 | 5 | 4 | 0 | 20 |
| NO OF SMALL COMPANIES | 9 | 1 | 3 | 0 | 13 |
| TURNOVER LARGE COMPANIES | R 206,203 | R 2,837,200 | R 0 | R 0 | R 3,043,403 |
| TURNOVER MEDIUM COMPANIES | R 184,258 | R 131,212 | R 83,428 | R 0 | R 398,898 |
| TURNOVER SMALL COMPANIES | R 7,346 | R 3,632 | R 4,697 | R 0 | R 15,675 |
| TOTAL TURNOVER | R 397,807 | R 2,972,044 | R 88,125 | R 0 | R 3,457,976 |
| **CORE LIST NON-PARTICIPANTS** | | | | | |
| NO OF LARGE COMPANIES | 0 | 0 | 0 | 1 | 1 |
| NO OF MEDIUM COMPANIES | 1 | 0 | 4 | 7 | 12 |
| NO OF SMALL COMPANIES | 27 | 0 | 5 | 0 | 32 |
| TURNOVER LARGE COMPANIES | R 0 | R 0 | R 0 | R 53,286 | R 53,286 |
| TURNOVER MEDIUM COMPANIES | R 13,999 | R 0 | R 35,112 | R 107,192 | R 171,966 |
| TURNOVER SMALL COMPANIES | R 34,428 | R 0 | R 11,225 | R 0 | R 42,758 |
| TOTAL ESTIMATED TURNOVER | R 48,427 | R 0 | R 46,337 | R 160,478 | R 268,010 |
| **ALL CORE LISTED SUPPLIERS** | | | | | |
| NO OF LARGE COMPANIES | 3 | 15 | 0 | 1 | 19 |
| NO OF MEDIUM COMPANIES | 12 | 5 | 8 | 7 | 32 |
| NO OF SMALL COMPANIES | 36 | 1 | 8 | 0 | 45 |
| TURNOVER LARGE COMPANIES | R 206,203 | R 2,837,200 | R 0 | R 53,286 | R 3,096,689 |
| TURNOVER MEDIUM COMPANIES | R 198,257 | R 131,212, | R 118,540 | R 107,192 | R 570,864 |
| TURNOVER SMALL COMPANIES | R 41,774 | R 3,632 | R 15,922 | R 0 | R 58,433 |
| TOTAL ESTIMATED TURNOVER | R 446,234 | R 2,972,044 | R 134,462 | R 160,478 | R 3,725,986 |
| **REPRESENTATION** | | | | | |
| TURNOVER LARGE COMPANIES | 100.00% | 100.00% | | 0.00% | 98.28% |
| TURNOVER MEDIUM COMPANIES | 92.94% | 100.00% | 70.38% | 0.00% | 69.88% |
| TURNOVER SMALL COMPANIES | 17.59% | 100.00% | 29.50% | | 26.83% |
| TOTAL ESTIMATED TURNOVER | 89.15% | 100.00% | 65.54% | 0.00% | 92.81% |

**Notes:**

- The turnover value of the 51 participating suppliers (the survey sample) represents 92.81% of the total estimated turnover of the 96 suppliers on the core list.
- The turnover value of the 18 participating large suppliers represents 98.28% of the estimated turnover of the 19 suppliers on the core list.

- The turnover value of the 20 participating medium suppliers represents 69.88% of the estimated turnover of the 32 suppliers on the core list.
- The turnover value of the 13 participating small suppliers represents 26.83% of the estimated turnover of 45 suppliers on the core list.
- The participating suppliers (survey sample) represent 89.15% of the estimated core list value of **local publishers**.
- The participating suppliers (survey sample) represent 100% of the estimated core list value of local **publishers and distributors.**
- The participating suppliers (survey sample) represent 65.54% of the estimated core list value of **local distributors.**

## 5. Contribution by category to total industry turnover

Having estimated the total industry turnover according to the size category, the sub-sector in which it operates and the supplier category of the company, the contribution each of these categories make to total industry turnover can be calculated.

**Note:** The sale of electronic books is excluded from these calculations. This is particularly significant in the sale of academic books.

**Fig. 5.1 Contribution to total industry net turnover according to size of company**

| SIZE OF COMPANY | ALL SUB-SECTORS | TRADE | EDUCATION | ACADEMIC |
|---|---|---|---|---|
| LARGE | 75.91% | 62.76% | 84.37% | 74.43% |
| MEDIUM | 13.99% | 23.95% | 7.77% | 14.66% |
| SMALL | 10.09% | 13.29% | 7.87% | 10.91% |

**Notes**

- Large publishers contribute 75.91% to the total net turnover of the industry. Their contribution is most dominant in the education sub-sector at 84.37%, followed by the academic sub-sector at 74.43% and the trade sub-sector at 62.76%.
- Medium-sized publishers contribute 13.99% to the total net turnover of the industry. Their contribution is most dominant in the trade sub-sector at 23.95%, followed by the academic sub-sector at 14.66% and the education sub-sector at 7.77%.
- Small publishers contribute 10.09% to the total net turnover of the industry. Their contribution is most dominant in the trade sub-sector at 13.29%, followed by the academic sub-sector at 10.91% and the education sub-sector at 7.87%.

**Fig. 5.2 Contribution to total industry net turnover according to sub-sector**

| SUB-SECTOR | % OF TOTAL TURNOVER |
|---|---|
| TRADE | 30.40% |
| EDUCATION | 50.64% |
| ACADEMIC | 18.96% |

**Note**

- The education sub-sector contributes just over half the total net turnover of the industry.

**Fig. 5.3 Contribution to total industry net turnover according to supplier category**

| % OF TOTAL TURNOVER | LOCAL PUBLISHERS | LOCAL PUBLISHERS & DISTRIBUTORS | LOCAL DISTRIBU-TORS | LOCALLY DISTRIBUTED PRODUCT | LOCAL IMPORT AGENCIES | OVERSEAS DIRECT SUPPLIERS | DIRECTLY IMPORTED PRODUCT |
|---|---|---|---|---|---|---|---|
| ALL | 16.58% | 72.86% | 3.09% | 92.53% | 3.96% | 3.51% | 7.47% |
| TRADE | 14.29% | 65.79% | 9.39% | 89.47% | 1.81% | 8.72% | 10.53% |
| EDUCATION | 16.42% | 83.37% | 0.22% | 100.00% | | | |
| ACADEMIC | 20.69% | 56.12% | 0.67% | 77.48% | 17.96% | 4.55% | 22.52% |

**Notes**

- The total turnover of local **publishers**, local **publishers and distributors**, and local **distributors** is referred to as “locally distributed product”.
- Across all sub-sectors locally distributed product contributes 92.53% to total estimated industry turnover.
- Most of the large companies form part of the **local publisher and distributor** category, which contributes 72.86% to the total estimated industry turnover.
- **Local distributors** make the largest contribution to total estimated industry turnover in the trade sub-sector (9.39%).
- **Directly imported product** accounts for 7.47% of total estimated industry turnover. In the academic sub-sector directly imported product contributes 22.52% to total estimated industry turnover.

# 6 Detailed sales and outsourcing profile of participants

## 6.1 Sales profile according to product category

### Fig. 6.1 Sales profile according to size of company

| **% OF TOTAL TURNOVER** | **ALL** | **LARGE** | **MEDIUM** | **SMALL** |
|---|---|---|---|---|
| **SALES PROFILE BY SUB-SECTOR** | | | | |
| GENERAL TRADE | 23.24% | 21.03% | 37.39% | 45.45% |
| RELIGIOUS TRADE | 8.61% | 5.52% | 29.69% | 2.53% |
| EDUCATIONAL | 51.84% | 56.41% | 22.31% | 12.69% |
| ACADEMIC | 16.31% | 17.04% | 10.62% | 39.34% |
| **SALES PROFILE BY ORIGIN** | | | | |
| LOCAL PRODUCTS | 77.26% | 78.34% | 69.69% | 71.93% |
| IMPORTED PRODUCTS | 22.74% | 21.66% | 30.31% | 28.07% |
| **SALES PROFILE BY PRODUCT** | | | | |
| BOOKS | 92.71% | 93.93% | 84.23% | 100.00% |
| NON-BOOKS | 7.29% | 6.07% | 15.77% | 0.00% |

**Notes**

- 56.84% of the turnover of participating **large companies** is generated by the sale of education books, 21.03% by the sale of general trade books, 17.04% by the sale of academic books and 5.52% by the sale of religious trade books.
- 78.34% of the turnover of large companies is generated by the sale of local product, and 21.66% by the sale of imported product.
- Book sales constitute 93.93% and non-book sales 6.07% of the total turnover of large companies.
- Medium and small companies derive more turnover from the sale of imported books than is the case with large companies (30.31% and 28.07% respectively versus 21.66% for large companies).
- Medium companies tend to sell more non-book products than either large or small companies. Some of these medium companies specialize in non-book products such as wall maps and charts.
- Religious trade publishers tend to be medium companies.

**Fig. 6.2 Sales profile according to sub-sector**

| **% OF TOTAL TURNOVER** | **ALL** | **GENERAL TRADE** | **RELIGIOUS TRADE** | **EDUCA-TION** | **ACADE-MIC** |
|---|---|---|---|---|---|
| **SALES PROFILE BY SUB-SECTOR** | | | | | |
| GENERAL TRADE | 23.24% | 93.73% | 0.00% | 1.09% | 6.43% |
| RELIGIOUS TRADE | 8.61% | 0.56% | 100.00% | 0.00% | 1.38% |
| EDUCATIONAL | 51.84% | 4.14% | 0.00% | 95.54% | 5.04% |
| ACADEMIC | 16.31% | 1.57% | 0.00% | 3.37% | 87.15% |
| **SALES PROFILE BY ORIGIN** | | | | | |
| LOCAL PRODUCTS | 77.26% | 38.01% | 61.27% | 93.32% | 88.63% |
| IMPORTED PRODUCTS | 22.74% | 61.99% | 38.73% | 6.68% | 11.37% |
| **SALES PROFILE BY PRODUCT** | | | | | |
| BOOKS | 92.71% | 94.99% | 80.56% | 98.01% | 78.59% |
| NON-BOOKS | 7.29% | 5.01% | 19.44% | 1.99% | 21.41% |

**Notes**

- This table compares turnover reported according to product with the total turnover of the different sub-sectors in which the suppliers are categorized according to their main focus of publishing. It illustrates the degree of focus of the publishers in each sub-sector.
- **General trade publishers** derive 93.73% of their total turnover from the sale of general trade books. Only 0.56% of their turnover derives from religious books, 4.14% from education books and 1.57% from the sale of academic books.
- Only 38.01% of the turnover of general trade publishers derives from the sale of locally published books, while 61.99% derives from imported product.
- Books generate 94.99% of the sale of general trade publishers and non-book products (mainly audio-books and brand extensions of book titles) only 7.29%.
- **Religious trade publishers** publish religious books exclusively. 61.27% of their turnover is generated from locally published books, and 19.44% from non-book products.
- **Educational publishers** generate 95.54% of total turnover from the sales of educational books, while general trade books contribute 1.09% and academic books 3.37% to total turnover.
- 93.32% of total turnover is derived from the sale of local product, and non-book products contribute only 1.99% to total turnover.
- **Academic suppliers** are the least focused of the four categories of book suppliers. 87.15% of their turnover is generated by academic product sales, while general trade

sales contribute 6.43%, religious trade books 1.38% and education books 5.04% to total turnover. In the academic supplier category local distributors selling imported product play a more prominent role than in the other three supplier categories.

- Imported product contributes 11.37% to the total turnover of academic suppliers, and non-book (mostly electronic books) products 21.41%.

**Fig. 6.3 Sales profile according to supplier category**

| **% OF TOTAL TURNOVER** | **ALL** | **PUBLISHERS** | **PUBLISHERS & DISTRIBUTORS** | **DISTRIBUTORS** |
|---|---|---|---|---|
| **SALES COMPOSITION BY SUB-SECTOR** | | | | |
| GENERAL TRADE | 23.24% | 42.77% | 19.44% | 63.31% |
| RELIGIOUS TRADE | 8.61% | 0.03% | 10.00% | 0.35% |
| EDUCATIONAL | 51.84% | 26.39% | 56.19% | 19.91% |
| ACADEMIC | 16.31% | 30.80% | 14.37% | 16.44% |
| **SALES COMPOSITION BY ORIGIN** | | | | |
| LOCAL PRODUCTS | 77.26% | 99.91% | 76.10% | 17.62% |
| IMPORTED PRODUCTS | 22.74% | 0.09% | 23.90% | 82.38% |
| **SALES COMPOSITION BY PRODUCT** | | | | |
| BOOKS | 92.71% | 80.58% | 94.15% | 98.94% |
| NON-BOOKS | 7.29% | 19.42% | 5.85% | 1.06% |

**Notes**

- 42.77% of the turnover of local publishers selling only their own product is generated by general trade books, only 0.03% by religious books, 26.39% by education books and 30.80% by academic books.
- In all four sub-sectors local publishers distribute imported books to a significant degree alongside their own products.
- Distributors tend to focus mainly on imported books (82.38% of total turnover) and to a much lesser extent on non-book products (1.06%) than the other two supplier categories.

## 6.2 Outsourcing of functions to third parties

The survey gathered information on which companies do their own marketing and sales and their own distribution of product.

**Fig. 6.4 Outsourcing of functions according to size**

| NUMBER OF SUPPLIERS | ALL | LARGE | MEDIUM | SMALL |
|---|---|---|---|---|
| **MARKETING AND SALES** | | | | |
| OWN MARKETING AND SALES | 47 | 18 | 19 | 10 |
| OUTSOURCED MARKETING | 4 | 0 | 1 | 3 |
| **DISTRIBUTION CATEGORY** | | | | |
| OWN DISTRIBUTION | 29 | 10 | 11 | 8 |
| OUTSOURCED DISTRIBUTION | 22 | 8 | 9 | 5 |

**Notes**

- None of the participating large companies outsource their sales and marketing function, but 9 out of the 18 outsource their distribution function. In a number of cases these logistical support suppliers are subsidiaries of the same holding company as the publishers are.
- Only 1 medium company outsources its marketing and sales function, and 9 out of 20 outsource their distribution function.
- Three small companies outsource sales and marketing, and 5 out of 13 outsource distribution.

**Fig. 6.5 Outsourcing of functions according to sub-sector**

| NUMBER OF SUPPLIERS<br>**MARKETING AND SALES** | GENERAL TRADE | RELIGIOUS TRADE | EDUCATION | ACADEMIC |
|---|---|---|---|---|
| OWN MARKETING AND SALES | 19 | 5 | 15 | 8 |
| OUTSOURCED MARKETING | 3 | 0 | 0 | 1 |
| **DISTRIBUTION CATEGORY** | | | | |
| OWN DISTRIBUTION | 10 | 2 | 11 | 6 |
| OUTSOURCED DISTRIBUTION | 12 | 3 | 4 | 3 |

**Notes**

- 3 of the small general trade publishers outsource their sales and marketing functions, and 12 out of 22 their distribution function.
- Educational publishers are more inclined to do their own distribution (11 out of 15) than suppliers in any other sub-sector.

# 7 Total income profile

A distinction is made between turnover, which is the income derived from the sale of products (books and non-books), and other income, such as the income derived from the sale of rights, consultancy, services rendered to third parties publishers etc. Turnover plus other income constitute **total income** of participating companies.

**Fig. 7.1 Total income profile of all participants**

| INCOME PROFILE | ALL PARTICIPANTS | |
|---|---|---|
| BOOK SALES | R 3,206,037,701 | 90.77% |
| NON-BOOK SALES | R 251,939,141 | 7.13% |
| PRODUCT SALES | R 3,457,976,842 | 97.90% |
| OTHER INCOME | R 74,140,413 | 2.10% |
| **TOTAL INCOME** | **R 3,532,117,255** | **100.00%** |

**Notes**

- Book sales contribute 90.77% to the total income of all participants. Non-book product sales contribute 7.13% and other activities 2.10% to the total income of all participants.

**Fig. 7.2 Total income profile according to size**

| INCOME PROFILE | LARGE | | MEDIUM | | SMALL | |
|---|---|---|---|---|---|---|
| BOOK SALES | R 2,816,986,311 | 91.84% | R 373,375,649 | 83.52% | R 15,675,741 | 88.18% |
| NON-BOOK SALES | R 182,016,662 | 5.93% | R 69,922,479 | 15.64% | R 0 | 0.00% |
| PRODUCT SALES | R 2,999,002,973 | 97.77% | R 443,298,128 | 99.16% | R 15,675,741 | 88.18% |
| OTHER INCOME | R 68,271,750 | 2.23% | R 3,767,483 | 0.84% | R 2,101,180 | 11.82% |
| TOTAL INCOME | R 3,067,274,723 | 100.00% | R 447,065,611 | 100.00% | R 17,776,921 | 100.00% |

**Notes**

- Large companies focus more on book sales than the other two size categories (91.84% versus 88.18% for small companies and 83.56% for medium companies).
- Some medium companies specialize in the production and distribution of non-book products to the extent that 15.64% of total turnover is derived from the sales of these products.
- One small company is very successful in the sale of export sales rights.

## Fig. 7.3 Source of other income according to size

| SALES RIGHTS | ALL | LARGE | MEDIUM | SMALL |
|---|---|---|---|---|
| ALL PARTICIPANTS | 51 | 18 | 20 | 13 |
| SECTION PARTICIPANTS | 10 | 6 | 3 | 1 |
| | | | | |
| LOCAL SALES RIGHTS | R 6,349,473 | R 4,331,586 | R 2,017,887 | R 0 |
| EXPORT SALES RIGHTS | R 3,527,057 | R 331,913 | R 1,093,964 | R 2,101,180 |
| TOTAL | R 9,876,530 | R 4,663,499 | R 3,111,851 | R 2,101,180 |
| | | | | |
| **OTHER ACTIVITIES** | **ALL** | **LARGE** | **MEDIUM** | **SMALL** |
| ALL PARTICIPANTS | 51 | 18 | 20 | 13 |
| SECTION PARTICIPANTS | 4 | 3 | 1 | 0 |
| | | | | |
| TOTAL OTHER ACTIVITIES | R 64,263,883 | R 63,608,251 | R 655,632 | R 0 |
| TOTAL OTHER INCOME | R 74,140,413 | R 68,271,750 | R 3,767,483 | R 2,101,180 |
| | | | | |
| **% OTHER INCOME** | **ALL** | **LARGE** | **MEDIUM** | **SMALL** |
| INCOME ALL PARTICIPANTS | R 3,457,976,842 | R 2,999,002,973 | R 443,298,128 | R 15,675,741 |
| LOCAL SALES RIGHTS | 0.18% | 0.14% | 0.46% | 0.00% |
| EXPORT SALES RIGHTS | 0.10% | 0.01% | 0.25% | 13.40% |
| OTHER ACTIVITIES | 1.86% | 2.12% | 0.15% | 0.00% |
| TOTAL OTHER INCOME | 2.14% | 2.28% | 0.85% | 13.40% |

### Notes

- 10 out of the 51 participants report income derived from the sale of publication rights. These participants are mainly large companies (6 out of 10) and medium companies (3 out of 10).
- Most of the income derived from the sales of rights originates in the local market: R 6,349,473 out of a total of R 9,876,530 or 64.29%.
- 4 out of the 51 participants report income derived from other activities. These activities include consultancy fees, the sale of remainder books and professional publishing fees for services rendered to third parties.
- The income derived from these other activities can be attributed almost entirely to three large companies.

**Fig. 7.4 Total income profile according to sub-sector**

| INCOME PROFILE | GENERAL TRADE | RELIGIOUS TRADE | EDUCATION | ACADEMIC |
|---|---|---|---|---|
| BOOK SALES | R 757,771,101 | R 229,827,433 | R 1,776,094,179 | R 442,344,988 |
| NON-BOOK SALES | R 39,950,568 | R 55,458,789 | R 35,998,737 | R 120,531,047 |
| PRODUCT SALES | R 797,721,669 | R 285,286,222 | R 1,812,092,916 | R 562,876,035 |
| OTHER INCOME | R 6,856,889 | R 2,010,105 | R 1,965,928 | R 63,307,491 |
| TOTAL INCOME | R 804,578,558 | R 287,296,327 | R 1,814,058,844 | R 626,183,526 |

**Notes**

- Income from other activities than the sale of product is most significant in the academic sub-sector, which contributes R 63,307,491 out of a total R 74,140,413 (85.39%) of such income.
- The religious trade sub-sector reports significant income from the sale of non-book products, namely R 55,458,789 (19.30%) of total sub-sector income.
- The academic sub-sector reports R 120,531,047 (19.25%) of sub-sector income from the sale of non-book product, mainly electronic books.

**Fig. 7.5 Source of other income according to sub-sector**

| SALES RIGHTS | ALL | GENERAL TRADE | RELIGIOUS TRADE | EDUCATION | ACADEMIC |
|---|---|---|---|---|---|
| ALL PARTICIPANTS | 51 | 22 | 5 | 15 | 9 |
| SECTION PARTICIPANTS | 10 | 6 | 1 | 2 | 1 |
| | | | | | |
| LOCAL SALES RIGHTS | R 6,349,473 | R 245,146 | R 1,984,105 | R 1,320,222 | R 2,800,000 |
| EXPORT SALES RIGHTS | R 3,527,057 | R 3,470,552 | R 26,000 | R 30,505 | R 0 |
| TOTAL | R 9,876,530 | R 3,715,698 | R 2,010,105 | R 1,350,727 | R 2,800,000 |
| **OTHER ACTIVITIES** | | | | | |
| ALL PARTICIPANTS | 51 | 22 | 5 | 15 | 9 |
| SECTION PARTICIPANTS | 4 | 2 | 0 | 1 | 1 |
| | | | | | |
| TOTAL OTHER ACTIVITIES | R 64,263,883 | R 3,141,191 | R 0 | R 615,201 | R 60,507,491 |
| TOTAL OTHER INCOME | R 74,140,413 | R 6,856,889 | R 2,010,105 | R 1,965,928 | R 63,307,491 |
| **% OTHER INCOME** | | | | | |
| ALL PARTICIPANTS | R 3,457,976,842 | R 797,721,669 | R 285,286,222 | R 1,812,092,916 | R 562,876,035 |
| LOCAL SALES RIGHTS | 0.18% | 0.03% | 0.70% | 0.07% | 0.50% |
| EXPORT SALES RIGHTS | 0.10% | 0.44% | 0.01% | 0.00% | 0.00% |
| OTHER ACTIVITIES | 1.86% | 0.39% | 0.00% | 0.03% | 10.75% |
| TOTAL OTHER INCOME | 2.14% | 0.86% | 0.70% | 0.11% | 11.25% |

**Notes**

- 6 out of 22 participants in the general trade sub-sector report income derived from the sale of publishing rights, specifically the sale of foreign rights.
- 1 religious trade publisher reports income form the sale of rights.
- 1 academic publisher reports the sale of publishing rights to another local publisher.

**Fig. 7.6 Total income profile according to supplier category**

| INCOME PROFILE | PUBLISHERS | | PUBLISHERS & DISTRIBUTORS | | DISTRIBUTORS | |
|---|---|---|---|---|---|---|
| BOOK SALES | R 320,569,891 | 79.61% | R 2,798,278,100 | 92.01% | R 87,189,710 | 98.94% |
| NON-BOOK SALES | R 77,237,449 | 19.18% | R 173,765,926 | 5.71% | R 935,766 | 1.06% |
| PRODUCT SALES | R 397,807,340 | 98.79% | R 2,972,044,026 | 97.72% | R 88,125,476 | 100.00% |
| OTHER INCOME | R 4,858,021 | 1.21% | R 69,282,392 | 2.28% | R 0 | 0.00% |
| TOTAL INCOME | R 402,665,361 | 100.00% | R 3,041,326,418 | 100.00% | R 88,125,476 | 100.00% |

**Notes**

- The larger companies in the **publisher and distributor supplier category** record more than 90% of the income derived from other activities than the sale of product.
- **Local distributors** focus almost exclusively on the sale of books, recording only 1.06% of total income from the sale of non-book products and no income derived from other activities.

# 8 Net turnover profile

This section reports on the net turnover (excluding VAT, discounts and returns) of all participating suppliers for the period 1 January to 31 December 2008. “Turnover” refers to all income derived from the sale of (book and non-book) product.

## 8.1 All product categories

**Fig. 8.1 Net turnover according to sub-sector: all participants**

| SUB-SECTOR | ALL PARTICIPANTS | |
|---|---|---|
| GENERAL TRADE | R 797,721,669 | 23.07% |
| RELIGIOUS TRADE | R 285,286,222 | 8.25% |
| EDUCATION | R 1,812,092,916 | 52.40% |
| ACADEMIC | R 562,876,035 | 16.28% |
| **TOTAL** | **R 3,457,976,842** | **100.00%** |

**Notes**

- The education sub-sector contributes 52.40% to total turnover recorded for the sale of product.
- The general trade sub-sector contributes 23.07% to total turnover recorded for the sale of product.
- The academic sub-sector contributes 16.28% to total turnover recorded for the sale of product.
- The religious trade sub-sector contributes 8.25% to total turnover recorded for the sale of product.

**Fig. 8.2 Net turnover according to sub-sector and size**

| SUB-SECTOR | LARGE COMPANIES | | MEDIUM COMPANIES | | SMALL COMPANIES | |
|---|---|---|---|---|---|---|
| GENERAL TRADE | R 580,403,311 | 19.35% | R 209,494,497 | 47.26% | R 7,823,861 | 49.91% |
| RELIGIOUS TRADE | R 153,390,000 | 5.11% | R 131,598,973 | 29.69% | R 297,249 | 1.90% |
| EDUCATIONAL | R 1,742,776,511 | 58.11% | R 68,327,915 | 15.41% | R 988,490 | 6.31% |
| ACADEMIC | R 522,433,151 | 17.42% | R 33,876,743 | 7.64% | R 6,566,141 | 41.89% |
| **TOTAL** | **R 2,999,002,973** | **100.00%** | **R 443,298,128** | **100.00%** | **R 15,675,741** | **100.00%** |

**Notes**

- Large companies focus mainly on the education sub-sector, with this sub-sector contributing 58.11% to the total turnover of all large companies. Large companies in the general trade sub-sector contribute 19.35% to the total turnover of all large companies. Large companies in the academic sub-sector contribute 17.42% to the total turnover of all large companies.
- Medium companies focus mainly on the general trade sub-sector and the religious trade sub-sector, contributing 47.26% and 29.69% respectively to the turnover of all medium companies.
- Small companies (in the form of local publishers) focus on the general trade sub-sector. Small companies (in the form of local distributors of imported product) focus on the academic sub-sector.

### Fig. 8.3 Net turnover according to sub-sector and supplier category

| SUB-SECTOR | PUBLISHERS | | PUBLISHERS & DISTRIBUTORS | | DISTRIBUTORS | |
|---|---|---|---|---|---|---|
| GENERAL TRADE | R 181,463,321 | 45.62% | R 530,830,121 | 17.86% | R 85,428,227 | 96.94% |
| RELIGIOUS TRADE | R 0 | 0.00% | R 284,988,973 | 9.59% | R 297,249 | 0.34% |
| EDUCATIONAL | R 89,986,981 | 22.62% | R 1,722,105,935 | 57.94% | R 0 | 0.00% |
| ACADEMIC | R 126,357,038 | 31.76% | R 434,118,997 | 14.61% | R 2,400,000 | 2.72% |
| **TOTAL** | **R 397,807,340** | **100.00%** | **R 2,972,044,026** | **100.00%** | **R 88,125,476** | **100.00%** |

**Notes**

- All local religious trade publishers also distribute imported product of overseas publishers.
- Local distributors for overseas publishers focus mainly on the general trade sub-sector.

## 8.2 Origin of product

### Fig. 8.4 Net turnover according to origin of product: all participants

| ORIGIN OF PRODUCT | TOTAL NET TURNOVER | |
|---|---|---|
| LOCAL PRODUCT | R 2,650,022,341 | 76.64% |
| IMPORTED PRODUCT | R 780,000,511 | 22.56% |
| OTHER UNSPECIFIED | R 27,953,990 | 0.81% |
| **TOTAL PRODUCT SALES** | **R 3,457,976,842** | **100.00%** |

**Notes**

- Participants did not indicate the origin of R 27,953,990 (0.81%) of the total turnover.
- Local product accounts for 76.64% of the total turnover of product.

**Fig. 8.5 Net turnover according to origin of product and company size**

| ORIGIN OF PRODUCT | LARGE COMPANIES | | MEDIUM COMPANIES | | SMALL COMPANIES | |
|---|---|---|---|---|---|---|
| LOCAL PRODUCT | R 2,348,721,594 | 78.32% | R 290,025,006 | 65.42% | R 11,275,741 | 71.93% |
| IMPORTED PRODUCT | R 649,490,506 | 21.66% | R 126,110,005 | 28.45% | R 4,400,000 | 28.07% |
| OTHER UNSPECIFIED | R 790,873 | 0.03% | R 27,163,117 | 6.13% | R 0 | 0.00% |
| **TOTAL PRODUCT SALES** | **R 2,999,002,973** | **100.00%** | **R 443,298,128** | **100.00%** | **R 15,675,741** | **100.00%** |

**Notes**

- Medium and small companies focus more on imported product than large companies do.

**Fig. 8.6 Net turnover according to origin of product and sub-sector**

| ORIGIN OF PRODUCT | TRADE | | EDUCATION | | ACADEMIC | |
|---|---|---|---|---|---|---|
| LOCAL PRODUCT | R 472,348,906 | 43.61% | R 1,678,778,636 | 92.64% | R 498,894,799 | 88.63% |
| IMPORTED PRODUCT | R 595,824,591 | 55.02% | R 120,194,684 | 6.63% | R 63,981,236 | 11.37% |
| OTHER UNSPECIFIED | R 14,834,394 | 1.37% | R 13,119,596 | 0.72% | R 0 | 0.00% |
| **TOTAL PRODUCT SALES** | **R 1,083,007,891** | **100.00%** | **R 1,812,092,916** | **100.00%** | **R 562,876,035** | **100.00%** |

**Notes**

- The turnover derived from imported product in the trade sub-sector exceeds the turnover derived from locally published product. In the education sub-sector 92.64% of all product is of local origin.
- Only 11.37% of the total turnover of academic product is derived from the sale of imported product.

**Fig. 8.7 Net turnover according to origin of product and sub-sector: trade**

| ORIGIN OF PRODUCT | GENERAL TRADE | | RELIGIOUS TRADE | | ALL TRADE | |
|---|---|---|---|---|---|---|
| LOCAL PRODUCT | R 297,551,072 | 27.47% | R 174,797,834 | 61.27% | R 472,348,906 | 43.61% |
| IMPORTED PRODUCT | R 485,336,203 | 44.81% | R 110,488,388 | 38.73% | R 595,824,591 | 55.02% |
| OTHER UNSPECIFIED | R 14,834,394 | 1.37% | R 0 | 0.00% | R 14,834,394 | 1.37% |
| **TOTAL PRODUCT SALES** | **R 797,721,669** | **73.66%** | **R 285,286,222** | **100.00%** | **R 1,083,007,891** | **100.00%** |

**Note**

- Local religious publishers contribute more (44.81%) to total trade sub-sector sales than local general trade publishers (38.73%).

**Fig. 8.8 Net turnover according to origin of product and supplier category**

| ORIGIN OF PRODUCT | PUBLISHERS | | PUBLISHERS & DISTRIBUTORS | | DISTRIBUTORS | |
|---|---|---|---|---|---|---|
| LOCAL PRODUCT | R 382,618,743 | 96.18% | R 2,251,874,998 | 75.77% | R 15,528,600 | 17.62% |
| IMPORTED PRODUCT | R 354,203 | 0.09% | R 707,049,432 | 23.79% | R 72,596,876 | 82.38% |
| OTHER UNSPECIFIED | R 14,834,394 | 3.73% | R 13,119,596 | 0.44% | R 0 | 0.00% |
| **TOTAL PRODUCT SALES** | **R 397,807,340** | **100.00%** | **R 2,972,044,026** | **100.00%** | **R 88,125,476** | **100.00%** |

**Notes**

- The large companies that dominate the **local publishers and distributors** supply category increased their turnover by an average of 31% (23.79% over 75.77%) by distributing imported product.
- The R 345,203 worth of imported product recorded by **local publishers** refers to the sale of imported titles in cases where the local publisher has published a local edition of the original title (most likely in Afrikaans) but acquired the right to sell the original title locally.
- **Local distributors** concentrate mainly on the distribution of imported books.

## 8.3 Origin and product category: books

### Fig. 8.9 Net turnover according to origin and product category: all suppliers

| CATEGORY AND ORIGIN OF PRODUCT | ALL PARTICIPANTS | |
|---|---|---|
| **ALL SUPPLIERS** | | |
| LOCALLY PUBLISHED BOOKS | R 2,444,979,251 | 70.71% |
| IMPORTED BOOKS | R 761,058,450 | 22.01% |
| LOCALLY PRODUCED NON-BOOKS | R 231,692,571 | 6.70% |
| IMPORTED NON-BOOKS | R 20,246,573 | 0.59% |
| TOTAL | R 3,457,976,845 | 100.00% |
| **GENERAL TRADE** | | |
| LOCALLY PUBLISHED BOOKS | R 293,915,789 | 36.58% |
| IMPORTED BOOKS | R 484,196,263 | 60.25% |
| LOCALLY PRODUCED NON-BOOKS | R 22,704,764 | 2.83% |
| IMPORTED NON-BOOKS | R 2,774,833 | 0.35% |
| TOTAL | R 803,591,649 | 100.00% |
| **RELIGIOUS TRADE** | | |
| LOCALLY PUBLISHED BOOKS | R 137,081,470 | 46.07% |
| IMPORTED BOOKS | R 105,042,216 | 35.30% |
| LOCALLY PRODUCED NON-BOOKS | R 40,303,308 | 13.54% |
| IMPORTED NON-BOOKS | R 15,155,481 | 5.09% |
| TOTAL | R 297,582,475 | 100.00% |
| **EDUCATION** | | |
| LOCALLY PUBLISHED BOOKS | R 1,636,479,432 | 91.29% |
| IMPORTED BOOKS | R 106,357,239 | 5.93% |
| LOCALLY PRODUCED NON-BOOKS | R 48,153,086 | 2.69% |
| IMPORTED NON-BOOKS | R 1,687,778 | 0.09% |
| TOTAL | R 1,792,677,535 | 100.00% |
| **ACADEMIC** | | |
| LOCALLY PUBLISHED BOOKS | R 377,502,560 | 66.92% |
| IMPORTED BOOKS | R 65,462,732 | 11.60% |
| LOCALLY PRODUCED NON-BOOKS | R 120,531,413 | 21.37% |
| IMPORTED NON-BOOKS | R 628,481 | 0.11% |
| **TOTAL** | **R 564,125,186** | **100.00%** |

### Notes

- Locally published books account for 70.71% of total turnover.
- Imported books account for 22.01% of total turnover.

- Locally produced non-book products contribute 6.70% to total turnover, and imported non-books 0.59%.
- In the **general trade sub-sector** imported books contribute 60.25% to total turnover, compared to 36.58% for locally published books.
- Non-books account for only 3.15% of total turnover, of which most is derived from the sale of locally produced product.
- In the **religious trade sub-sector**, locally produced books contribute 46.07% and imported books 35.30% of total turnover.
- Locally produced non-book products contribute 13.54% and imported non-book products 5.09%.
- Locally published books dominate the turnover of the **education sub-sector**, namely 91.29% of total turnover. Imported books account for a further 5.93% of total turnover.
- Locally produced non-book products (mainly wall charts) contribute 2.69% to total turnover.
- Locally published **academic** books account for 66.92% of turnover, and imported books 11.60%.
- Electronic books contribute 21.37% to total turnover, and imported non-book products a further 0.11%.

**Fig. 8.10 Net turnover according to origin and product category per sub-sector**

| CATEGORY AND ORIGIN OF PRODUCT | SUB-SECTOR FOCUS OF SUPPLIER | | | | | |
|---|---|---|---|---|---|---|
| | GENERAL TRADE | | EDUCATION | | ACADEMIC | |
| **GENERAL TRADE** | **TURNOVER** | **%** | **TURNOVER** | **%** | **TURNOVER** | **%** |
| LOCALLY PUBLISHED BOOKS | R 268,783,278 | 91.45% | R 7,165,017 | 2.44% | R 17,967,494 | 6.11% |
| IMPORTED BOOKS | R 453,851,176 | 93.73% | R 12,127,873 | 2.50% | R 18,217,214 | 3.76% |
| LOCALLY PRODUCED NON-BOOKS | R 22,704,764 | 100.00% | R 0 | 0.00% | R 0 | 0.00% |
| IMPORTED NON-BOOKS | R 2,374,096 | 85.56% | R 400,737 | 14.44% | R 0 | 0.00% |
| TOTAL | R 747,713,314 | 93.05% | R 19,693,627 | 2.45% | R 36,184,708 | 4.50% |
| **EDUCATION** | | | | | | |
| LOCALLY PUBLISHED BOOKS | R 2,567,592 | 0.16% | R 1,605,558,443 | 98.11% | R 28,353,397 | 1.73% |
| IMPORTED BOOKS | R 15,611,512 | 14.68% | R 90,739,682 | 85.32% | R 6,045 | 0.01% |
| LOCALLY PRODUCED NON-BOOKS | R 14,835,671 | 30.81% | R 33,317,415 | 69.19% | R 0 | 0.00% |
| IMPORTED NON-BOOKS | R 20,768 | 1.23% | R 1,667,010 | 98.77% | R 0 | 0.00% |
| TOTAL | R 33,035,543 | 1.84% | R 1,731,282,550 | 96.58% | R 28,359,442 | 1.58% |
| **ACADEMIC** | | | | | | |
| LOCALLY PUBLISHED BOOKS | R 1,721,687 | 0.46% | R 44,552,478 | 11.80% | R 331,228,395 | 87.74% |
| IMPORTED BOOKS | R 10,749,536 | 16.42% | R 15,924,030 | 24.33% | R 38,789,166 | 59.25% |
| LOCALLY PRODUCED NON-BOOKS | R 0 | 0.00% | R 366 | 0.00% | R 120,531,047 | 100.00% |
| IMPORTED NON-BOOKS | R 15,272 | 2.43% | R 613,209 | 97.57% | R 0 | 0.00% |
| **TOTAL** | **R 12,486,495** | **2.21%** | **R 61,090,083** | **10.83%** | **R 490,548,608** | **86.96%** |

**Notes**

- In this table the total turnover according to product (rows) as indicated by the respondents in their product analysis are matched with the total turnover according to the main focus areas of the publishers (columns). This provides an indication of the crossover sales amongst the industry sub-sectors in terms of product. However, the allocation of **local distributors** to industry sub-sectors does obscure the clear product focus to some extent, as these distributors tend to serve more than one sub-sector to a greater extent than local publishers did.
- The general trade sub-sector contributes R 268,783,278 out of R 293,915,789 (91.45%) of the total turnover of **locally published general trade books** reported by all suppliers.
- Suppliers allocated to the education sub-sector contribute R 7,165,017 (2.44%) of total turnover of locally published general trade books. Most of these sales are derived from books published for the set work/prescribed reader market or for the Early Childhood Development (ECD) market; these books are generally regarded as general trade books.

- Suppliers allocated to the academic sub-sector contribute R 17,967,494 (6.11%) of total turnover of locally published general trade books. Many of these books are highly specialized computer manuals; photography handbooks, etc. which are sold via general retail outlets to the consumer market.
- General trade suppliers account for 93.05% of all recorded turnover of general trade products; educational suppliers contribute 2.45% and academic suppliers 4.50% of the total turnover.
- The education sub-sector contributed R 1,605,558,443 out of R 1,636,479,432 (98.11%) to the total turnover of **locally published educational books** reported by all suppliers.
- Suppliers allocated to the general trade sub-sector contribute R 2,567,592 (0.16%) of total turnover of locally published educational books.
- Suppliers allocated to the academic sub-sector contribute R 28,353,397 (1.73%) of total turnover of locally published educational books. Many of these books are destined for the Further Education and Training (FET) colleges; these books are regarded as educational product but are published by some academic publishers as well as most educational publishers.
- The academic sub-sector contribute R 331,228,395 out of R 377,502,560 (87.74%) of the total turnover of **locally published academic books** reported by all suppliers
- Suppliers allocated to the general trade sub-sector contribute R 1,721,687 (0.4%) of total turnover of locally published academic books.
- Suppliers allocated to the education sub-sector contribute R 44,552,478 (11.80%) of total turnover of locally published academic books.

**Fig. 8.11 Net turnover according to origin and product category: religious trade products**

| TYPE AND ORIGIN OF PRODUCT | SUB-SECTOR FOCUS OF SUPPLIER | | | | | |
|---|---|---|---|---|---|---|
| | GENERAL TRADE | | RELIGIOUS TRADE | | ACADEMIC | |
| **RELIGIOUS TRADE** | **TURNOVER** | **%** | **TURNOVER** | **%** | **TURNOVER** | **%** |
| LOCALLY PUBLISHED BOOKS | R 1,772,478 | 1.29% | R 134,494,526 | 98.11% | R 814,466 | 0.59% |
| IMPORTED BOOKS | R 2,713,842 | 2.58% | R 95,332,907 | 90.76% | R 6,968,811 | 6.63% |
| LOCALLY PRODUCED NON-BOOKS | R 0 | 0.00% | R 40,303,308 | 100.00% | R 0 | 0.00% |
| IMPORTED NON-BOOKS | R 0 | 0.00% | R 15,155,481 | 100.00% | R 0 | 0.00% |
| **TOTAL** | **R 4,486,320** | **1.51%** | **R 285,286,222** | **95.87%** | **R 7,783,277** | **2.62%** |

**Note**

- Religious trade suppliers contribute 98.11% to the total turnover of all locally published religious books. General trade suppliers contribute 1.29% and academic suppliers 0.59%.

## 8.4 Origin and product category: non-book products

### Fig. 8.12 Net turnover non-book products according to product category

| SALES OF NON-BOOK PRODUCTS | ALL PARTICIPANTS | |
|---|---|---|
| ALL PARTICIPANTS | 51 | |
| SECTION PARTICIPANTS | 21 | |
| | | |
| LOCAL DIGITAL BOOKS | R 124,091,035 | 49.25% |
| LOCAL PRINTED NON-BOOKS | R 80,952,055 | 32.13% |
| IMPORTED DIGITAL | R 17,554,771 | 6.97% |
| IMPORTED PRINTED NON-BOOKS | R 1,387,290 | 0.55% |
| OTHER PRODUCTS | R 27,953,990 | 11.10% |
| **TOTAL** | **R 251,939,141** | **100.00%** |

**Notes**

- 21 out of the 51 participants recorded turnover derived from the sale of non-book products.
- R 124,091,035 (49.25%) of the total recorded turnover of non-book products is derived from the sale of locally produced digital books.
- Locally printed non-books contribute 32.13% to the total turnover; imported digital books 6.97% and imported printed non-books 0.55%

### Fig. 8.13 Net turnover of non-book products according to sub-sector

| SALES OF NON-BOOK PRODUCTS | GENERAL TRADE | | RELIGIOUS TRADE | | EDUCATION | |
|---|---|---|---|---|---|---|
| ALL PARTICIPANTS | 22 | | 5 | | 15 | |
| SECTION PARTICIPANTS | 7 | | 3 | | 9 | |
| LOCAL DIGITAL BOOKS | R 108,591 | 0.27% | R 415,842 | 0.75% | R 3,035,555 | 8.43% |
| LOCAL PRINTED NON-BOOKS | R 22,597,446 | 56.56% | R 39,887,466 | 71.92% | R 18,467,143 | 51.30% |
| IMPORTED DIGITAL | R 1,629,659 | 4.08% | R 15,094,804 | 27.22% | R 830,308 | 2.31% |
| IMPORTED PRINTED NON-BOOKS | R 780,478 | 1.95% | R 60,677 | 0.11% | R 546,135 | 1.52% |
| OTHER PRODUCTS | R 14,834,394 | 37.13% | R 0 | 0.00% | R 13,119,596 | 36.44% |
| **TOTAL** | **R 39,950,568** | **100.00%** | **R 55,458,789** | **100.00%** | **R 35,998,737** | **100.00%** |

**Notes**

- There are too few academic sub-sector participants to be able to report on this sub-sector without impeaching on confidentiality.
- 7 out of the 22 participants in the general trade sub-sector, report turnover derived from the sale of non-book products.
- 3 of the 5 participating religious trade participants record sales of non-book products, and 9 out of 15 educational product suppliers.
- Locally printed non-books dominate the turnover in all three sub-sectors; contributing 56.56% of total general trade non-book turnover, 71.92% in the religious trade sub-sector and 51.30% in the education sub-sector.

## 8.5 Locally published books

**Fig. 8.14 Net turnover of locally published books according to product sub-sector: all participants**

| **LOCALLY PUBLISHED BOOKS** | **ALL PARTICIPANTS** | |
|---|---|---|
| ALL PARTICIPANTS | 51 | |
| SECTION PARTICIPANTS | 47 | |
| GENERAL TRADE | R 293,915,789 | 12.02% |
| RELIGIOUS TRADE | R 137,081,470 | 5.61% |
| EDUCATIONAL | R 1,636,479,432 | 66.93% |
| ACADEMIC | R 377,502,560 | 15.44% |
| **ALL** | **R 2,444,979,251** | **100.00%** |

**Notes**

- 47 out of 51 participants record turnover derived from the sale of locally published books.
- The education sub-sector contributes 66.93% to the total turnover of all locally published books; the general trade sub-sector 12.02%, the religious trade sub-sector 5.61% and the academic sub-sector 15.44%.

**Fig. 8.15 Net turnover of locally published books according to product sub-sector: all participants – detailed sub-sectors**

| LOCALLY PUBLISHED BOOKS | ALL PARTICIPANTS | |
|---|---|---|
| GENERAL TRADE FICTION | R 89,991,161 | 3.68% |
| GENERAL TRADE NON-FICTION | R 203,924,628 | 8.34% |
| RELIGIOUS BOOKS | R 137,081,470 | 5.61% |
| EDUCATION SCHOOLS | R 1,534,509,517 | 62.76% |
| EDUCATION FET | R 66,727,068 | 2.73% |
| EDUCATION ABET | R 35,242,847 | 1.44% |
| ACADEMIC TEXTBOOKS | R 206,475,632 | 8.44% |
| ACADEMIC PROFESSIONAL | R 167,675,374 | 6.86% |
| ACADEMIC SCHOLARLY | R 3,351,554 | 0.14% |
| **TOTAL** | **R 2,444,979,251** | **100.00%** |

**Notes**

- Fiction contributes R 89,991,161 (30.62 %) to the total locally published general trade book turnover of R 293,915,789.
- FET textbooks contribute R 66,727,068 (4.08 %) to the total locally published educational book turnover of R 1,636,479,432.
- ABET textbooks contribute R 35,242,847 (2.15 %) to the total locally published educational book turnover of R 1,636,479,432.
- Scholarly books contribute R 3,351,554 (0.89 %) to the total locally published academic book turnover of R 377,502,560.

**Fig. 8.16 Net turnover of locally published books according to product sub-sector: supplier sub-sector**

| LOCALLY PUBLISHED BOOKS | TRADE | | EDUCATION | | ACADEMIC | |
|---|---|---|---|---|---|---|
| ALL PARTICIPANTS | 27 | | 15 | | 9 | |
| SECTION PARTICIPANTS | 25 | | 13 | | 9 | |
| GENERAL TRADE | R 268,783,278 | 65.66% | R 7,165,017 | 0.43% | R 17,967,494 | 4.75% |
| RELIGIOUS TRADE | R 136,267,004 | 33.29% | R 0 | 0.00% | R 814,466 | 0.22% |
| EDUCATIONAL | R 2,567,592 | 0.63% | R 1,605,558,443 | 96.88% | R 28,353,397 | 7.49% |
| ACADEMIC | R 1,721,687 | 0.42% | R 44,552,478 | 2.69% | R 331,228,395 | 87.54% |
| **ALL** | **R 409,339,561** | **100.00%** | **R 1,657,275,938** | **100.00%** | **R 378,363,752** | **100.00%** |

**Notes**

- 25 of the 27 participants, that record turnover derived from the sale of general trade books, record turnover derived from the sale of locally published books.
- Trade suppliers contribute 98.95% (65.66% + 33.29%) to the turnover of all locally published trade products. Educational books contribute only 0.63% of the total turnover of these suppliers. Academic books contribute only 0.42% of the total turnover of these suppliers.
- Educational suppliers derive 96.88% of total turnover from the sale of locally published educational books, and 2.69% from the sale of academic books.
- Academic suppliers report 87.54% of turnover from academic books, 7.49% from educational books and 4.75% from the sale of trade books.

**Fig. 8.17 Net turnover of locally published books according to product sub-sector: supplier sub-sector - detail**

| LOCALLY PUBLISHED BOOKS | TRADE SUPPLIER | | EDUCATIONAL SUPPLIER | | ACADEMIC SUPPLIER | |
|---|---|---|---|---|---|---|
| GENERAL TRADE FICTION | R 88,769,745 | 21.69% | R 1,153,397 | 0.07% | R 68,019 | 0.02% |
| GEN. TRADE NON-FICTION | R 180,013,533 | 43.98% | R 6,011,620 | 0.36% | R 17,899,475 | 4.73% |
| RELIGIOUS BOOKS | R 136,267,004 | 33.29% | R 0 | 0.00% | R 814,466 | 0.22% |
| EDUCATION SCHOOLS | R 1,253,916 | 0.31% | R 1,528,590,887 | 92.24% | R 4,664,714 | 1.23% |
| EDUCATION FET | R 1,313,676 | 0.32% | R 50,712,555 | 3.06% | R 14,700,837 | 3.89% |
| EDUCATION ABET | R 0 | 0.00% | R 26,255,001 | 1.58% | R 8,987,846 | 2.38% |
| ACADEMIC TEXTBOOKS | R 1,606,169 | 0.39% | R 44,370,569 | 2.68% | R 160,498,894 | 42.42% |
| ACADEMIC PROFESSIONAL | R 115,518 | 0.03% | R 0 | 0.00% | R 167,559,856 | 44.29% |
| ACADEMIC SCHOLARLY | R 0 | 0.00% | R 181,909 | 0.01% | R 3,169,645 | 0.84% |
| **TOTAL** | **R 409,339,561** | **100.00%** | **R 1,657,275,938** | **100.00%** | **R 378,363,752** | **100.00%** |

**Note**

- There is a small degree of crossover sales between the educational and the academic book suppliers in terms of the type of product sold.

**Fig. 8.18 Net turnover of locally published trade books according to product sub-sector: supplier sub-sector**

| LOCALLY PUBLISHED BOOKS | GENERAL TRADE SUPPLIERS | | RELIGIOUS TRADE SUPPLIERS | | ALL TRADE SUPPLIERS | |
|---|---|---|---|---|---|---|
| ALL PARTICIPANTS | 22 | | 5 | | 27 | |
| SECTION PARTICIPANTS | 20 | | 5 | | 25 | |
| GENERAL TRADE | R 268,783,278 | 97.79% | R 0 | 0.00% | R 268,783,278 | 65.66% |
| RELIGIOUS TRADE | R 1,772,478 | 0.64% | R 134,494,526 | 100.00% | R 136,267,004 | 33.29% |
| EDUCATIONAL | R 2,567,592 | 0.93% | R 0 | 0.00% | R 2,567,592 | 0.63% |
| ACADEMIC | R 1,721,687 | 0.63% | R 0 | 0.00% | R 1,721,687 | 0.42% |
| **ALL** | **R 274,845,035** | **100.00%** | **R 134,494,526** | **100.00%** | **R 409,339,561** | **100.00%** |

**Note**

- Religious trade book publishers sell religious books only.

**Fig. 8.19 Net turnover of locally published trade books according to product sub-sector: supplier sub-sector - detail**

| LOCALLY PUBLISHED BOOKS | GENERAL TRADE SUPPLIERS | | RELIGIOUS TRADE SUPPLIERS | | ALL TRADE SUPPLIERS | |
|---|---|---|---|---|---|---|
| GENERAL TRADE FICTION | R 88,769,745 | 32.30% | R 0 | 0.00% | R 88,769,745 | 21.69% |
| GENERAL TRADE NON-FICTION | R 180,013,533 | 65.50% | R 0 | 0.00% | R 180,013,533 | 43.98% |
| RELIGIOUS BOOKS | R 1,772,478 | 0.64% | R 134,494,526 | 100.00% | R 136,267,004 | 33.29% |
| EDUCATION SCHOOLS | R 1,253,916 | 0.46% | R 0 | 0.00% | R 1,253,916 | 0.31% |
| EDUCATION FET | R 1,313,676 | 0.48% | R 0 | 0.00% | R 1,313,676 | 0.32% |
| EDUCATION ABET | R 0 | 0.00% | R 0 | 0.00% | R 0 | 0.00% |
| ACADEMIC TEXTBOOKS | R 1,606,169 | 0.58% | R 0 | 0.00% | R 1,606,169 | 0.39% |
| ACADEMIC PROFESSIONAL | R 115,518 | 0.04% | R 0 | 0.00% | R 115,518 | 0.03% |
| ACADEMIC SCHOLARLY | R 0 | 0.00% | R 0 | 0.00% | R 0 | 0.00% |
| **TOTAL** | **R 274,845,035** | **100.00%** | **R 134,494,526** | **100.00%** | **R 409,339,561** | **100.00%** |

**Note**

- Religious trade book publishers sell religious books only.

## 8.6 Imported books

**Fig. 8.20 Net turnover of imported books according to product sub-sector: all participants**

| SALES OF IMPORTED BOOKS | ALL PARTICIPANTS | |
|---|---|---|
| ALL PARTICIPANTS | 51 | |
| SECTION PARTICIPANTS | 27 | |
| GENERAL TRADE | R 484,196,263 | 63.62% |
| RELIGIOUS TRADE | R 105,042,216 | 13.80% |
| EDUCATIONAL | R 106,357,239 | 13.97% |
| ACADEMIC | R 65,462,732 | 8.60% |
| **ALL** | **R 761,058,450** | **100.00%** |

**Notes**

- 27 out of 51 participants record turnover derived from the sale of imported books.
- The general trade sub-sector contribute 63.62% to the total turnover of all imported books; the education sub-sector 13.97%, the religious trade sub-sector 13.80% and the academic sub-sector 8.60%.

**Fig. 8.21 Net turnover of imported books according to product sub-sector: all participants - detailed sub-sectors**

| SALES OF IMPORTED BOOKS | ALL PARTICIPANTS | |
|---|---|---|
| GENERAL TRADE FICTION | R 171,506,966 | 22.54% |
| GENERAL TRADE NON-FICTION | R 312,689,297 | 41.09% |
| RELIGIOUS BOOKS | R 105,042,216 | 13.80% |
| EDUCATION SCHOOLS | R 102,571,497 | 13.48% |
| EDUCATION FET | R 935,546 | 0.12% |
| EDUCATION ABET | R 2,850,196 | 0.37% |
| ACADEMIC TEXTBOOKS | R 52,204,209 | 6.86% |
| ACADEMIC PROFESSIONAL | R 10,688,455 | 1.40% |
| ACADEMIC SCHOLARLY | R 2,570,068 | 0.34% |
| **TOTAL** | **R 761,058,450** | **100.00%** |

**Notes**

- Fiction contributes R 171,506,966 of the total imported general trade book turnover of R 484,196,263 (35.42 %).

- FET textbooks contribute R 935,546 to the total imported educational book turnover of R 106,357,239 (0.88 %).
- ABET textbooks contribute R 2,850,196 to the total imported educational book turnover of R 106,357,239 (2.68 %).
- Scholarly books contribute R 2,570,068 to the total locally published academic book turnover of R 65,462,732 (3.92 %).

**Fig. 8.22 Net turnover of imported books according to product sub-sector: supplier sub-sector**

| SALES OF IMPORTED BOOKS | ALL TRADE SUPPLIERS | | EDUCATION SUPPLIERS | | ACADEMIC SUPPLIERS | |
|---|---|---|---|---|---|---|
| ALL PARTICIPANTS | 27 | | 15 | | 9 | |
| SECTION PARTICIPANTS | 13 | | 9 | | 5 | |
| GENERAL TRADE | R 453,851,176 | 78.49% | R 12,127,873 | 10.21% | R 18,217,214 | 28.47% |
| RELIGIOUS TRADE | R 98,046,749 | 16.96% | R 26,656 | 0.02% | R 6,968,811 | 10.89% |
| EDUCATIONAL | R 15,611,512 | 2.70% | R 90,739,682 | 76.37% | R 6,045 | 0.01% |
| ACADEMIC | R 10,749,536 | 1.86% | R 15,924,030 | 13.40% | R 38,789,166 | 60.63% |
| **ALL** | **R 578,258,973** | **100.00%** | **R 118,818,241** | **100.00%** | **R 63,981,236** | **100.00%** |

**Notes**

- 13 of the 27 participants that report turnover derived from the sale of trade books, report sales from imported books.
- Trade books account for 95.45% (78.49% + 16.96%) of the turnover generated by trade books suppliers. Educational books contribute 2.70% and academic books 1.86% of the total turnover of the trade book suppliers.
- Educational book suppliers derive 76.37% of their turnover from the sale of imported educational books, 13.40% from the sale of imported academic books and 10.23% from the sale of imported trade books.
- The turnover values reported by local distributors allocated to the academic sub-sector somewhat distort the turnover contributions made by trade books, as many of these distributors also supply the general library market with trade books.

**Fig. 8.23 Net turnover of imported trade books according to product sub-sector: supplier sub-sector - detail**

| IMPORTED BOOKS | TRADE SUPPLIERS | | EDUCATIONAL SUPPLIERS | | ACADEMIC SUPPLIERS | |
|---|---|---|---|---|---|---|
| GENERAL TRADE FICTION | R 169,647,540 | 29.34% | R 1,779,257 | 1.50% | R 80,169 | 0.13% |
| GENERAL TRADE NON-FICTION | R 284,203,636 | 49.15% | R 10,348,616 | 8.71% | R 18,137,045 | 28.35% |
| RELIGIOUS BOOKS | R 98,046,749 | 16.96% | R 26,656 | 0.02% | R 6,968,811 | 10.89% |
| EDUCATION SCHOOLS | R 14,692,462 | 2.54% | R 87,879,035 | 73.96% | R 0 | 0.00% |
| EDUCATION FET | R 919,050 | 0.16% | R 10,451 | 0.01% | R 6,045 | 0.01% |
| EDUCATION ABET | R 0 | 0.00% | R 2,850,196 | 2.40% | R 0 | 0.00% |
| ACADEMIC TEXTBOOKS | R 10,257,148 | 1.77% | R 13,996,377 | 11.78% | R 27,950,684 | 43.69% |
| ACADEMIC PROFESSIONAL | R 492,388 | 0.09% | R 444,843 | 0.37% | R 9,751,224 | 15.24% |
| ACADEMIC SCHOLARLY | R 0 | 0.00% | R 1,482,810 | 1.25% | R 1,087,258 | 1.70% |
| **TOTAL** | **R 578,258,973** | **100.00%** | **R 118,818,241** | **100.00%** | **R 63,981,236** | **100.00%** |

**Notes**

- Imported general trade non-fiction contributes 49.15% to the turnover of all imported trade books, followed by general trade fiction (29.34%) and religious books (19.96%).
- Educational book suppliers that import books focus mainly on schoolbooks (73.96%) and academic textbooks (11.78%).
- Imported books supplied by academic suppliers include books classified as general trade non-fiction books (28.35% of total turnover) and religious books (10.89% of total turnover). These books are probably used for academic courses.

**Fig. 8.24 Net turnover of imported books according to product sub-sector: supplier sub-sector**

| IMPORTED BOOKS | GENERAL TRADE SUPPLIERS | | RELIGIOUS TRADE SUPPLIERS | | ALL TRADE SUPPLIERS | |
|---|---|---|---|---|---|---|
| ALL PARTICIPANTS | 22 | | 5 | | 27 | |
| SECTION PARTICIPANTS | 9 | | 4 | | 13 | |
| GENERAL TRADE | R 453,851,176 | 93.98% | R 0 | 0.00% | R 453,851,176 | 78.49% |
| RELIGIOUS TRADE | R 2,713,842 | 0.56% | R 95,332,907 | 100.00% | R 98,046,749 | 16.96% |
| EDUCATIONAL | R 15,611,512 | 3.23% | R 0 | 0.00% | R 15,611,512 | 2.70% |
| ACADEMIC | R 10,749,536 | 2.23% | R 0 | 0.00% | R 10,749,536 | 1.86% |
| **ALL** | **R 482,926,066** | **100.00%** | **R 95,332,907** | **100.00%** | **R 578,258,973** | **100.00%** |

**Notes**

- Imported general trade books constitute 93.98% of the turnover of general trade suppliers.
- General trade suppliers import very few religious books (0.56% of turnover).
- Religious trade suppliers focus exclusively on religious books.

**Fig. 8.25 Net turnover of imported trade books according to product sub-sector: supplier sub-sector - detail**

| SALES OF IMPORTED BOOKS | GENERAL TRADE SUPPLIERS | | RELIGIOUS TRADE SUPPLIERS | | ALL TRADE SUPPLIERS | |
|---|---|---|---|---|---|---|
| GENERAL TRADE FICTION | R 169,647,540 | 35.13% | R 0 | 0.00% | R 169,647,540 | 29.34% |
| GEN.TRADE NON-FICTION | R 284,203,636 | 58.85% | R 0 | 0.00% | R 284,203,636 | 49.15% |
| RELIGIOUS BOOKS | R 2,713,842 | 0.56% | R 95,332,907 | 100.00% | R 98,046,749 | 16.96% |
| EDUCATION SCHOOLS | R 14,692,462 | 3.04% | R 0 | 0.00% | R 14,692,462 | 2.54% |
| EDUCATION FET | R 919,050 | 0.19% | R 0 | 0.00% | R 919,050 | 0.16% |
| EDUCATION ABET | R 0 | 0.00% | R 0 | 0.00% | R 0 | 0.00% |
| ACADEMIC TEXTBOOKS | R 10,257,148 | 2.12% | R 0 | 0.00% | R 10,257,148 | 1.77% |
| ACADEMIC PROFESSIONAL | R 492,388 | 0.10% | R 0 | 0.00% | R 492,388 | 0.09% |
| ACADEMIC SCHOLARLY | R 0 | 0.00% | R 0 | 0.00% | R 0 | 0.00% |
| **TOTAL** | **R 482,926,066** | **100.00%** | **R 95,332,907** | **100.00%** | **R 578,258,973** | **100.00%** |

**Notes**

- Non-fiction contributes 58.85% to the turnover of books imported by general trade suppliers.
- 3.04% of books imported by general trade suppliers are classified as schoolbooks and 2.12% as academic textbooks.

# 9 Net turnover according to category of sales outlet

This section reports on the net turnover of locally published and imported books according to type of sales outlet during the period 1 January to 31 December 2008. Participants had to provide net turnover values and average trade discounts for all sales made to retail outlets and other customers. Nearly all booksellers focus almost entirely on serving one of the three sub-sectors in the industry, and all sales made to such booksellers are destined for that particular sub-sector. These sales outlets are divided into a number of broad categories and are specified in terms of the broad sub-sector these outlets serve. Examples were provided to assist publishers in categorizing their sales outlets. The categories of sales outlets identified are described in **Appendix 7.**

The results obtained from this section of the survey cannot be directly related to the sale profiles per industry sub-sector for two main reasons:

- Not all publishers are able to provide the required breakdown into the various types of outlets; and
- Many books categorized as destined for one sub-sector can be sold to an outlet serving another sub-sector (the obvious example is general books sold to educational institutions as prescribed readers/set works).

## 9.1 All categories of sales outlet

**Fig. 9.1 Net turnover through all categories of sales outlet in all sub-sectors**

*Representative nature of participation*

Not all participants were able to complete this section of the survey accurately enough to be included in the survey database. This section of the report is based on data received from the following panel of participants.

| | |
|---|---|
| ALL PARTICIPANTS | 51 |
| TURNOVER ALL PARTICIPANTS | R 3,457,976,842 |
| SECTION PARTICIPANTS | 40 |
| TURNOVER SECTION PARTICIPANTS | R 3,007,824,553 |
| **% REPRESENTATION** | **86.98%** |

| ALL SALES OUTLETS | TURNOVER | % OF TOTAL TURNOVER |
|---|---|---|
| NATIONAL BOOKSELLER CHAINS | R 874,254,167 | 29.07% |
| INDEPENDENT BOOKSELLERS | R 602,708,621 | 20.04% |
| NON-BOOK RETAIL OUTLET | R 42,029,790 | 1.40% |
| WHOLESALERS ETC | R 41,103,895 | 1.37% |
| INTERNET BOOKSELLERS | R 21,820,692 | 0.73% |
| BOOK CLUBS | R 46,234,405 | 1.54% |
| CORPORATION DIRECT SALES | R 18,306,816 | 0.61% |
| PUBLIC DIRECT SALES | R 13,210,601 | 0.44% |
| LIBRARIES AND LIBRARTY SUPPLIERS | R 38,345,731 | 1.27% |
| STATE & PROVINCIAL | R 867,263,056 | 28.83% |
| SCHOOLS | R 159,845,283 | 5.31% |
| SCHOOL BOOK DISTRIBUTORS | R 282,992,196 | 9.41% |
| EXPORTS | R 41,581,837 | 1.38% |
| OTHERS | R 43,568,318 | 1.45% |
| TOTAL | R 3,007,824,553 | 100.00% |

**Notes**

- Across all sub-sectors of the industry, the major national bookseller chains accounted for 29.07% of turnover.

**Fig. 9.2 Net turnover through all categories of sales outlet: general trade sub-sector**

*Representative nature of participation*

Not all participants were able to complete this section of the survey accurately enough to be included in the survey database. This section of the report is based on data received from the following panel of participants.

| | |
|---|---|
| ALL GENERAL TRADE PARTICIPANTS | 22 |
| TURNOVER ALL PARTICIPANTS | R 797,721,669 |
| SECTION PARTICIPANTS | 27 |
| TURNOVER SECTION PARTICIPANTS | R 772,418,027 |
| **% REPRESENTATION** | **96.83%** |

| GENERAL TRADE | TURNOVER | % OF TOTAL TURNOVER |
|---|---|---|
| NATIONAL BOOKSELLER CHAINS | R 521,508,077 | 67.52% |
| INDEPENDENT BOOKSELLERS | R 75,280,554 | 9.75% |
| NON-BOOK RETAIL OUTLET | R 22,189,704 | 2.87% |
| WHOLESALERS ETC | R 26,371,307 | 3.41% |
| INTERNET BOOKSELLERS | R 17,336,916 | 2.24% |
| BOOK CLUBS | R 40,577,030 | 5.25% |
| CORPORATION DIRECT SALES | R 15,774,151 | 2.04% |
| PUBLIC DIRECT SALES | R 9,885,917 | 1.28% |
| LIBRARIES & LIBRARY SUPPLIERS | R 14,841,824 | 1.92% |
| STATE & PROVINCIAL DIRECT SUPPLIES | R 3,427,196 | 0.44% |
| SCHOOLS | R 3,971,097 | 0.51% |
| SCHOOL BOOK DISTRIBUTORS | R 6,892,733 | 0.89% |
| EXPORTS | R 14,289,723 | 1.85% |
| OTHERS | R 71,798 | 0.01% |
| **TOTAL** | **R 772,418,027** | **100.00%** |

**Notes**

- All of the 22 participants in the general trade sub-sector participated in this section of the report. In addition, 5 other suppliers recorded turnover derived from sales through general trade sales outlets. These are local distributors assigned to the academic sub-sector.
- The national bookseller chains contribute 67.52% of the total turnover recorded through the general trade book retail sales outlets.
- During the year under consideration two national book chains closed down: Impact Books and Fascination Books. The remaining national book chains in the trade sub-sector are Airport Retail Concessions, Bargain Books, C.N.A., CUM Books, Estoril, Exclusive Books, Gospel Direct, P.N.A. and Wordsworths.
- Just over 400 independent booksellers serve the trade sub-sector. Together they contribute 9.75% of the net turnover value.
- Trade book suppliers reporting sales through state and provincial departments, schools and schoolbook distributors indicate the value of school set works/readers sold by them.

## Fig. 9.3 Net turnover through all categories of sales outlet: religious trade sub-sector

*Representative nature of participation*

All participants completed this section of the survey accurately enough to be included in the survey database.

| | |
|---|---|
| ALL RELIGIOUS TRADE PARTICIPANTS | 5 |
| TURNOVER ALL PARTICIPANTS | R 285,286,222 |
| SECTION PARTICIPANTS | 5 |
| TURNOVER SECTION PARTICIPANTS | R 285,286,222 |
| **% REPRESENTATION** | **100.00%** |

| RELIGIOUS TRADE | TURNOVER | % OF TOTAL |
|---|---|---|
| NATIONAL BOOKSELLER CHAINS | R 181,560,829 | 63.57% |
| INDEPENDENT BOOKSELLERS | R 62,234,686 | 21.79% |
| NON-BOOK RETAIL OUTLET | R 19,641,330 | 6.88% |
| WHOLESALERS ETC | R 2,086,714 | 0.73% |
| INTERNET BOOKSELLERS | R 1,468,406 | 0.51% |
| BOOK CLUBS | R 5,390,050 | 1.89% |
| CORPORATION DIRECT SALES | R 358,043 | 0.13% |
| PUBLIC DIRECT SALES | R 990,186 | 0.35% |
| LIBRARIES & LIBRARY SUPPLIERS | R 301,667 | 0.11% |
| STATE & PROVINCIAL DIRECT SUPPLIES | R 0 | 0.00% |
| SCHOOLS | R 364,406 | 0.13% |
| SCHOOL BOOK DISTRIBUTORS | R 1,996 | 0.00% |
| EXPORTS | R 9,260,369 | 3.24% |
| OTHERS | R 1,955,540 | 0.68% |
| TOTAL | R 285,614,222 | 100.00% |

### Notes

- The national bookseller chains contribute 63.57% to the total turnover recorded through all the religious book sales outlets.

**Fig. 9.4 Net turnover through all categories of sales outlet: education sub-sector**

*Representative nature of participation*

Not all participants were able to complete this section of the survey accurately enough to be included in the survey database. This section of the report is based on data received from the following panel of participants.

| | |
|---|---|
| ALL EDUCATION PARTICIPANTS | 15 |
| TURNOVER ALL PARTICIPANTS | R 1,812,092,916 |
| SECTION PARTICIPANTS | 22 |
| TURNOVER SECTION PARTICIPANTS | R 1,812,092,916 |
| **% REPRESENTATION** | **100.00%** |

| EDUCATIONAL SECTOR | TURNOVER | % OF TOTAL |
|---|---|---|
| NATIONAL BOOKSELLER CHAINS | R 62,244,526 | 3.43% |
| INDEPENDENT BOOKSELLERS | R 435,740,984 | 24.05% |
| NON-BOOK RETAIL OUTLET | R 144,067 | 0.01% |
| WHOLESALERS ETC | R 12,385,841 | 0.68% |
| INTERNET BOOKSELLERS | R 1,134,130 | 0.06% |
| BOOK CLUBS | R 227,949 | 0.01% |
| CORPORATION DIRECT SALES | R 1,072,296 | 0.06% |
| PUBLIC DIRECT SALES | R 2,118,125 | 0.12% |
| LIBRARIES & LIBRARY SUPPLIERS | R 20,720,529 | 1.14% |
| STATE & PROVINCIAL DIRECT SUPPLIES | R 862,299,244 | 47.59% |
| SCHOOLS | R 136,461,165 | 7.53% |
| SCHOOL BOOK DISTRIBUTORS | R 274,526,646 | 15.15% |
| EXPORTS | R 2,952,367 | 0.16% |
| OTHERS | R 65,047 | 0.00% |
| **TOTAL** | **R 1,812,092,916** | **100.00%** |

**Notes**

- In addition to 15 educational suppliers, 7 academic suppliers record sales through the educational book sales outlets.
- During 2008 the largest national supplier of schoolbooks, Afribooks, and its Western Cape subsidiary, Alibiprops, closed down. This means that there is no chain to serve the education sub-sector on a national level.

- More than 50% of all turnover is derived from supplier direct sales to state and provincial departments and schools.
- Dedicated contact booksellers record only 27.48% of total educational book turnover.

**Fig. 9.5 Net turnover through all categories of sales outlet: academic sub-sector**

*Representative nature of participation*

Not all participants were able to complete this section of the survey accurately enough to be included in the survey database. This section of the report is based on data received from the following panel of participants.

| | |
|---|---|
| ALL ACADEMIC PARTICIPANTS | 9 |
| TURNOVER ALL PARTICIPANTS | R 562,876,035 |
| SECTION PARTICIPANTS | 15 |
| TURNOVER SECTION PARTICIPANTS | R 181,712,910 |
| **% REPRESENTATION** | **24.10%** |

| **ACADEMIC SECTOR** | **TURNOVER** | **% OF TOTAL** |
|---|---|---|
| NATIONAL BOOKSELLER CHAINS | R 108,940,735 | 59.95% |
| INDEPENDENT BOOKSELLERS | R 29,452,397 | 16.21% |
| NON-BOOK RETAIL OUTLET | R 54,689 | 0.03% |
| WHOLESALERS ETC | R 260,033 | 0.14% |
| INTERNET BOOKSELLERS | R 1,881,240 | 1.04% |
| BOOK CLUBS | R 39,376 | 0.02% |
| CORPORATION DIRECT SALES | R 1,102,326 | 0.61% |
| PUBLIC DIRECT SALES | R 216,373 | 0.12% |
| LIBRARIES & LIBRARY SUPPLIERS | R 2,481,711 | 1.37% |
| STATE & PROVINCIAL DIRECT SUPPLIES | R 1,536,616 | 0.85% |
| SCHOOLS | R 19,048,615 | 10.48% |
| SCHOOL BOOK DISTRIBUTORS | R 1,570,821 | 0.86% |
| EXPORTS | R 15,079,378 | 8.30% |
| OTHERS | R 48,600 | 0.03% |
| **TOTAL** | **R 181,712,910** | **100.00%** |

### Notes

- This analysis excludes the sale of electronic product.

- A number of the large academic book suppliers did not participate in this section of the survey.
- A number of trade and educational book suppliers indicate sales through academic book sales outlets.
- During the year under consideration one of the national bookseller chains, Brain Books, ceased operation. Four academic bookseller chains remained: Van Schaik Booksellers, Armstrongs, Protea and Juta.
- From the category of sales outlet used (e.g. schools) it appears as if academic publishers were also active in the FET market.

## 9.2 Discount profile according to category of sales outlet and sub-sector

The average trade discounts are calculated from the survey results, and these are used to calculate the gross retail values (excluding VAT) of the recorded net turnover values. Because of the sensitivity of the information, only the average trade discounts recorded in each sub-sector across all the categories of sales outlets will be reported.

**Fig. 9.6 Average trade discount according to sub-sector**

| SUB-SECTOR | AVERAGE TRADE DISCOUNT |
|---|---|
| GENERAL TRADE | 43.62% |
| RELIGIOUS TRADE | 41.91% |
| EDUCATION | 29.10% |
| ACADEMIC | 33.31% |
| **ALL** | **34.22%** |

## 9.3 Turnover at gross retail price values according to sales outlet category and sub-sector

By first re-allocating the unallocated turnover to the different sales outlet categories in the same proportion as the reported turnover per sales outlet category, and by then applying the average trade discounts to these revised total net turnover values, the total turnovers at gross retail value are calculated (excluding VAT).

**Fig. 9.7 Turnover at gross retail price values according to sales outlet category and sub-sector**

| CATEGORY OF SALES OUTLET | GENERAL TRADE | RELIGIOUS TRADE | EDUCATION | ACADEMIC | ALL OUTLETS |
|---|---|---|---|---|---|
| NATIONAL BOOKSELLER CHAINS | R 960,274,962 | R 334,812,167 | R 87,868,898 | R 304,847,284 | R 1,687,803,311 |
| INDEPENDENT BOOKSELLERS | R 122,373,067 | R 101,316,470 | R 615,123,654 | R 82,416,217 | R 921,229,408 |
| NON-BOOK RETAIL OUTLET | R 34,610,565 | R 30,681,217 | R 203,375 | R 153,035 | R 65,648,193 |
| WHOLESALERS ETC | R 50,806,691 | R 4,026,212 | R 17,484,754 | R 727,647 | R 73,045,304 |
| INTERNET BOOKSELLERS | R 27,748,627 | R 2,353,750 | R 1,601,020 | R 5,264,247 | R 36,967,644 |
| BOOK CLUBS | R 120,613,307 | R 16,045,464 | R 321,789 | R 110,185 | R 137,090,745 |
| CORPORATION DIRECT SALES | R 25,247,341 | R 573,917 | R 1,513,731 | R 3,084,623 | R 30,419,613 |
| PUBLIC DIRECT SALES | R 12,856,122 | R 1,289,598 | R 2,325,633 | R 538,468 | R 17,009,820 |
| LIBRARIES /LIBRARY SUPPLIERS | R 23,755,104 | R 483,551 | R 31,500,652 | R 7,126,162 | R 62,865,469 |
| STATE & PROVINCIAL | R 5,093,589 | R 0 | R 1,217,284,307 | R 4,299,890 | R 1,226,677,786 |
| SCHOOLS | R 5,164,206 | R 474,595 | R 158,643,472 | R 53,303,464 | R 217,585,737 |
| SCHOOL BOOK DISTRIBUTORS | R 10,244,162 | R 2,971 | R 387,541,773 | R 4,395,606 | R 402,184,512 |
| **TOTAL** | **R 1,398,787,743** | **R 492,059,912** | **R 2,521,413,059** | **R 466,266,828** | **R 4,878,527,542** |

**Notes**

- These calculations do not include the turnover derived from the sale of electronic books in the academic sub-sector.
- The total turnover of all participants at gross retail value excluding VAT is estimated as R 4,878,527,542.

**Fig. 9.8 Turnover profile at gross retail price values according to each category of sales outlet**

| CATEGORY OF OUTLET | GENERAL TRADE | RELIGIOUS TRADE | EDUCATION | ACADEMIC | ALL OUTLETS |
|---|---|---|---|---|---|
| NATIONAL BOOKSELLER CHAINS | 68.65% | 68.04% | 3.48% | 65.38% | 34.60% |
| INDEPENDENT BOOKSELLERS | 8.75% | 20.59% | 24.40% | 17.68% | 18.88% |
| NON-BOOK RETAIL OUTLET | 2.47% | 6.24% | 0.01% | 0.03% | 1.35% |
| WHOLESALERS ETC | 3.63% | 0.82% | 0.69% | 0.16% | 1.50% |
| INTERNET BOOKSELLERS | 1.98% | 0.48% | 0.06% | 1.13% | 0.76% |
| BOOK CLUBS | 8.62% | 3.26% | 0.01% | 0.02% | 2.81% |
| CORPORATION DIRECT SALES | 1.80% | 0.12% | 0.06% | 0.66% | 0.62% |
| PUBLIC DIRECT SALES | 0.92% | 0.26% | 0.09% | 0.12% | 0.35% |
| LIBRARIES/ LIBRARY SUPPLIERS | 1.70% | 0.10% | 1.25% | 1.53% | 1.29% |
| STATE & PROVINCIAL DIRECT SUPPLIES | 0.36% | 0.00% | 48.28% | 0.92% | 25.14% |
| SCHOOLS | 0.37% | 0.10% | 6.29% | 11.43% | 4.46% |
| SCHOOL BOOK DISTRIBUTORS | 0.73% | 0.00% | 15.37% | 0.94% | 8.24% |
| **TOTAL** | **100.00%** | **100.00%** | **100.00%** | **100.00%** | **100.00%** |

**Notes**

- In this summary all export sales and all undefined “other sales” have been omitted.
- The two trade sub-sectors (68.65% and 68.04%) and the academic sub-sector (65.38%) rely mainly on the national bookseller chain infrastructure to bring their books to market.
- Independent booksellers play a more significant role in the academic book supply chain (17.68% of total turnover) than in the general trade sub-sector (8.75% of total turnover).
- Independent booksellers play a more dominant role in bringing books to the market in the religious trade sub-sector (20.59% of total turnover) than in the general trade sub-sector (8.75% of total turnover).
- Across all sub-sectors, dedicated contact booksellers account for only 53.48% of total turnover.

**Fig. 9.9 Percentage contribution to outlet sales according to sub-sector**

| SELECTED OUTLET CATEGORIES | GENERAL TRADE | RELIGIOUS TRADE | EDUCATION | ACADEMIC | ALL OUTLETS |
|---|---|---|---|---|---|
| INTERNET BOOKSELLERS | 75.06% | 6.37% | 4.33% | 14.24% | 100.00% |
| BOOK CLUBS | 87.98% | 11.70% | 0.23% | 0.08% | 100.00% |
| PUBLIC DIRECT SALES | 75.58% | 7.58% | 13.67% | 3.17% | 100.00% |
| LIBRARIES | 37.79% | 0.77% | 50.11% | 11.34% | 100.00% |

**Notes**

- The turnover of Internet booksellers is made up of 75.06% general trade products, 6.37% religious trade products, 4.33% educational products and 14.24% academic products.
- Book clubs serve the trade market almost exclusively. Religious books are well represented in this sales outlet category.
- Direct sales to the public is much more prevalent in the trade sub-sectors than in the other sub-sectors.
- Public libraries buy virtually no religious books.
- Educational books generate more than half of the total turnover of libraries and library suppliers.

# 10 Total net education turnover according to province

### Fig. 10 Net education turnover according to province

| EDUCATIONAL TURNOVER PER PROVINCE | TURNOVER | % OF TOTAL TURNOVER |
|---|---|---|
| WESTERN CAPE | R 222,915,060 | 12.07% |
| EASTERN CAPE | R 360,401,737 | 19.52% |
| KWAZULU-NATAL | R 269,504,443 | 14.60% |
| NORTHERN CAPE | R 29,519,805 | 1.60% |
| FREE STATE | R 33,019,590 | 1.79% |
| NORTH WEST | R 98,268,216 | 5.32% |
| GAUTENG | R 485,907,762 | 26.32% |
| MPUMALANGA | R 175,129,329 | 9.49% |
| LIMPOPO | R 171,327,759 | 9.28% |
| TOTAL PROVINCIAL DEPARTMENTS | R 1,845,993,701 | 99.98% |
| NATIONAL DEPT OF EDUCATION | R 13,674,923 | 0.74% |
| **TOTAL EDUCATION** | **R 1,846,333,146** | **100.00%** |

**Notes**

- All educational publishers participate in this section of the survey. In addition, 4 academic suppliers record sales in this section.
- Gauteng accounts for 26.32% of all sales of educational books.

# 11 Turnover profile of locally published books according to language

This section reports on net turnover of sales of locally published books (excluding VAT) by participating companies according to language and sub-sector for the period 1 January 2008 to 31 December 2008.

## 11.1 Language groupings

*Representative nature of participation*

Not all participants were able to complete this section of the survey accurately enough to be included in the survey database. This section of the report is based on data received from the following panel of participants.

| **LOCAL SALES BY LANGUAGE** | **ALL LANGAGES** |
|---|---|
| ALL PARTICIPANTS | 44 |
| TURNOVER ALL PARTICIPANTS | R 2,650,022,341 |
| SECTION PARTICIPANTS | 39 |
| TURNOVER SECTION PARTICIPANTS | R 2,200,824,211 |
| **% REPRESENTATION** | **83.05%** |

**Notes**

- 44 of the 51 participants publish local books.
- 39 of these 44 participated in this section of the survey.

**Fig. 11.1 Net turnover of locally published books according to language and product category: all languages**

| PRODUCT CATEGORY | TURNOVER | % OF TOTAL TURNOVER |
|---|---|---|
| TRADE FICTION | R 94,706,067 | 4.30% |
| TRADE NON-FICTION | R 187,537,566 | 8.52% |
| RELIGIOUS BOOKS | R 135,057,218 | 6.14% |
| EDUCATIONAL SCHOOLS | R 1,324,391,363 | 60.18% |
| EDUCATIONAL FET | R 57,364,638 | 2.61% |
| EDUCATIONAL ABET | R 35,212,676 | 1.60% |
| ACADEMIC TEXTBOOKS | R 195,440,492 | 8.88% |
| ACADEMIC PROFESSIONAL | R 167,675,374 | 7.62% |
| ACADEMIC SCHOLARLY | R 3,438,813 | 0.16% |
| **ALL LOCAL PUBLICATIONS** | **R 2,200,824,211** | **100.00%** |

**Note**

- The 39 participants record turnovers as set out above.

**Fig. 11.2 Net turnover of locally published books according to language and product category**

| PRODUCT CATEGORY | ENGLISH | AFRIKAANS | AFRICAN LANG | MULTILINGUAL | OTHER |
|---|---|---|---|---|---|
| ALL PARTICIPANTS | 44 | 44 | 44 | 44 | 44 |
| SECTION PARTICIPANTS | 39 | 32 | 22 | 5 | 4 |
| | **TURNOVER** | **TURNOVER** | **TURNOVER** | **TURNOVER** | **TURNOVER** |
| TRADE FICTION | R 29,000,365 | R 63,983,978 | R 1,637,803 | R 0 | R 83,921 |
| TRADE NON-FICTION | R 136,419,699 | R 50,058,321 | R 668,507 | R 387,714 | R 3,325 |
| RELIGIOUS BOOKS | R 36,940,422 | R 76,573,393 | R 21,518,579 | R 24,824 | R 0 |
| EDUCATIONAL SCHOOLS | R 969,449,017 | R 131,027,489 | R 220,147,312 | R 3,767,545 | R 0 |
| EDUCATIONAL FET | R 56,804,973 | R 538,870 | R 20,795 | R 0 | R 0 |
| EDUCATIONAL ABET | R 33,645,978 | R 184,163 | R 1,382,535 | R 0 | R 0 |
| ACADEMIC TEXTBOOKS | R 174,870,023 | R 20,398,793 | R 171,676 | R 0 | R 0 |
| ACADEMIC PROFESSIONAL | R 151,275,374 | R 16,400,000 | R 0 | R 0 | R 0 |
| ACADEMIC SCHOLARLY | R 3,424,336 | R 320 | R 14,157 | R 0 | R 0 |
| **ALL LOCAL PUBLICATIONS** | **R 1,591,830,187** | **R 359,165,327** | **R 245,561,364** | **R 4,180,083** | **R 87,246** |

**Note**

- Of the 44 participants engaged in local book publishing, 39 publish books in English, 32 in Afrikaans, 22 in one of more of the African Languages, 5 publish multilingual texts and 4 publish in other European languages.

**Fig. 11.3 Net turnover of locally published books according to product category**

| PRODUCT CATEGORY | ALL | ENGLISH | AFRIKAANS | AFRICAN LANGUAGES | MULTI-LINGUAL | OTHER |
|---|---|---|---|---|---|---|
| TRADE FICTION | 4.30% | 1.82% | 17.81% | 0.67% | 0.00% | 96.19% |
| TRADE NON-FICTION | 8.52% | 8.57% | 13.94% | 0.27% | 9.28% | 3.81% |
| RELIGIOUS BOOKS | 6.14% | 2.32% | 21.32% | 8.76% | 0.59% | 0.00% |
| EDUCATIONAL SCHOOLS | 60.18% | 60.90% | 36.48% | 89.65% | 90.13% | 0.00% |
| EDUCATIONAL FET | 2.61% | 3.57% | 0.15% | 0.01% | 0.00% | 0.00% |
| EDUCATIONAL ABET | 1.60% | 2.11% | 0.05% | 0.56% | 0.00% | 0.00% |
| ACADEMIC TEXTBOOKS | 8.88% | 10.99% | 5.68% | 0.07% | 0.00% | 0.00% |
| ACADEMIC PROFESSIONAL | 7.62% | 9.50% | 4.57% | 0.00% | 0.00% | 0.00% |
| ACADEMIC SCHOLARLY | 0.16% | 0.22% | 0.00% | 0.01% | 0.00% | 0.00% |
| **ALL LOCAL PUBLICATIONS** | **100.00%** | **100.00%** | **100.00%** | **100.00%** | **100.00%** | **100.00%** |

**Notes**

- Trade fiction accounts for 4.30% of the total turnover recorded across all languages.
- Trade fiction accounts for 17.81% of the total turnover recorded for Afrikaans books, and only 1.82% of the total recorded turnover of English books.

**Fig. 11.4 Net turnover of locally published books according to product category and language**

| PRODUCT CATGORY | ENGLISH | AFRIKAANS | AFRICAN LANGUAGES | MULTI-LINGUAL | OTHER |
|---|---|---|---|---|---|
| TRADE FICTION | 30.62% | 67.56% | 1.73% | 0.00% | 0.09% |
| TRADE NON-FICTION | 72.74% | 26.69% | 0.36% | 0.21% | 0.00% |
| RELIGIOUS BOOKS | 27.35% | 56.70% | 15.93% | 0.02% | 0.00% |
| EDUCATIONAL SCHOOLS | 73.20% | 9.89% | 16.62% | 0.28% | 0.00% |
| EDUCATIONAL FET | 99.02% | 0.94% | 0.04% | 0.00% | 0.00% |
| EDUCATIONAL ABET | 95.55% | 0.52% | 3.93% | 0.00% | 0.00% |
| ACADEMIC TEXTBOOKS | 89.47% | 10.44% | 0.09% | 0.00% | 0.00% |
| ACADEMIC PROFESSIONAL | 90.22% | 9.78% | 0.00% | 0.00% | 0.00% |
| ACADEMIC SCHOLARLY | 99.58% | 0.01% | 0.41% | 0.00% | 0.00% |
| **TOTAL** | **72.33%** | **16.32%** | **11.16%** | **0.19%** | **0.00%** |

**Notes**

- Of the total turnover of local publications reported by the participants of this section of the survey, books in the English language account for 72.33% of total turnover, Afrikaans for 16.32% and the African languages for 11.16%.
- Afrikaans books generate 9.89% of all schoolbook turnover, and books in the other official African languages generate 16.62%.
- Afrikaans books contribute 10.44% to the turnover of academic textbooks, and 9.78% to the turnover of professional academic books.

## 11.2 African languages

### Fig.11.5 Net turnover of locally published books according to African language and product category

| PRODUCT CATEGORYE | ISIZULU | ISIXHOSA | SEPEDI | SESOTHO | SETSWANA |
|---|---|---|---|---|---|
| TRADE FICTION | R 315,171 | R 310,853 | R 251,565 | R 146,791 | R 124,034 |
| TRADE NON-FICTION | R 171,817 | R 438,422 | R 4,088 | R 8,893 | R 6,921 |
| RELIGIOUS BOOKS | R 6,945,191 | R 4,440,956 | R 1,744,942 | R 2,566,342 | R 2,150,488 |
| EDUCATIONAL SCHOOLS | R 54,846,069 | R 64,671,859 | R 24,820,790 | R 14,374,914 | R 28,245,376 |
| EDUCATIONAL FET | R 0 | R 20,795 | R 0 | R 0 | R 0 |
| EDUCATIONAL ABET | R 207,963 | R 576,162 | R 142,205 | R 58,100 | R 328,604 |
| ACADEMIC TEXTBOOKS | R 168,181 | R 0 | R 0 | R 0 | R 3,495 |
| ACADEMIC PROFESSIONAL | R 0 | R 0 | R 0 | R 0 | R 0 |
| ACADEMIC SCHOLARLY | R 8,737 | R 169 | R 3,290 | R 139 | R 70 |
| TOTAL | R 62,663,129 | R 70,459,216 | R 26,966,880 | R 17,155,179 | R 30,858,988 |
| | | | | | |
| | **ISINDEBELE** | **XITSONGA** | **TSIVENDA** | **SISWATI** | |
| TRADE FICTION | R 73,522 | R 195,469 | R 47,504 | R 144,221 | |
| TRADE NON-FICTION | R 1,867 | R 31,122 | R 304 | R 308 | |
| RELIGIOUS BOOKS | R 15,287 | R 1,076,952 | R 844,507 | R 1,016,883 | |
| EDUCATIONAL SCHOOLS | R 4,645,018 | R 11,407,424 | R 2,342,740 | R 9,407,111 | |
| EDUCATIONAL FET | R 0 | R 0 | R 0 | R 0 | |
| EDUCATIONAL ABET | R 7,881 | R 10,720 | R 28,296 | R 22,601 | |
| ACADEMIC TEXTBOOKS | R 0 | R 0 | R 0 | R 0 | |
| ACADEMIC PROFESSIONAL | R 0 | R 0 | R 0 | R 0 | |
| ACADEMIC SCHOLARLY | R 139 | R 1,046 | R 425 | R 142 | |
| **TOTAL** | **R 4,743,714** | **R 12,722,733** | **R 3,263,776** | **R 10,591,266** | |

# 12 Local production profile

This section reports on the number of local titles published by all participating companies between 1 January and 31 December 2008

*Representative nature of participation*

Not all participants were able to complete this section of the survey accurately enough to be included in the survey database. This section of the report is based on data received from the following panel of participants.

| | |
|---|---|
| NUMBER OF LOCAL PUBLISHERS | 44 |
| TURNOVER OF LOCAL PUBLISHERS | R 2,650,022,341 |
| SECTION PARTICIPANTS | 40 |
| TURNOVER OF SECTION PUBLISHERS | R 2,267,641,731 |
| **% REPRESENTATION** | **85.57%** |

**Note**

- 40 of the 44 participants involved in local publishing report in this section of the survey. Based on total turnover, these participants represent 85.57% of the survey sample.

## 12.1 Product category

**Fig. 12.1 Number of new/revised editions and reprints according to product category**

| PRODUCT CATEGORY | ALL EDITIONS | FIRST & REVISED EDITIONS | REPRINTS |
|---|---|---|---|
| TRADE FICTION | 797 | 564 | 233 |
| TRADE NON-FICTION | 919 | 509 | 410 |
| RELIGIOUS BOOKS | 1,033 | 678 | 355 |
| EDUCATIONAL SCHOOLS | 9,983 | 2,648 | 7,335 |
| EDUCATIONAL FET COLLEGES | 1,014 | 357 | 657 |
| EDUCATIONAL ABET | 216 | 37 | 179 |
| ACADEMIC TEXTBOOKS | 560 | 188 | 372 |
| ACADEMIC PROFESSIONAL | 73 | 46 | 27 |
| ACADEMIC SCHOLARLY | 83 | 63 | 20 |
| **TOTAL** | **14,678** | **5,090** | **9,588** |

**Notes**

- The participants record 14,678 new, revised or reprinted editions published during this period.
- 5,090 of these 14,678 editions (34.67%) are either new or revised editions and 9,588 (65.33%) are reprints.
- Educational books account for 9,983 of the total output; that is 68.01% of all published editions.
- 2,648 of the new or revised editions (52.02%) are education books.
- 7,335 out of 9,588 reprints (76.50%) are schoolbooks.

## 12.2 Language grouping

**Fig. 12.2 Number of new/revised editions and reprints according to language grouping**

| PRODUCT CATEGORY | ALL LANGUAGES | ENGLISH | AFRIKAANS | AFRICAN LANGUAGES |
|---|---|---|---|---|
| TRADE FICTION | 564 | 124 | 332 | 108 |
| TRADE NON-FICTION | 509 | 356 | 152 | 1 |
| RELIGIOUS BOOKS | 678 | 276 | 385 | 17 |
| EDUCATIONAL SCHOOLS | 2,648 | 1,053 | 326 | 1,269 |
| EDUCATIONAL FET COLLEGES | 357 | 352 | 5 | 0 |
| EDUCATIONAL ABET | 37 | 19 | 2 | 16 |
| ACADEMIC TEXTBOOKS | 188 | 173 | 14 | 1 |
| ACADEMIC PROFESSIONAL | 46 | 44 | 2 | 0 |
| ACADEMIC SCHOLARLY | 63 | 63 | 0 | 0 |
| **TOTAL** | **5,090** | **2,460** | **1,218** | **1,412** |

**Notes**

- 2,460 of the 5,090 (48.33%) new and revised editions are English titles: 1,218 23 (93%) Afrikaans titles and 1,412 (27.74%) titles in African languages.
- More schoolbooks are published in the African languages (1,269) than in either English (1,053) or Afrikaans (326).

**Fig. 12.3 Number of new/revised editions and reprints published according to sub-sector and African language**

| NUMBER OF TITLES | ISIZULU | ISIXHOSA | SEPEDI | SESOTHO | SETSWANA | SINDEBELE | XISTONGA | TSIVENDA | SISWATI |
|---|---|---|---|---|---|---|---|---|---|
| TRADE FICTION | 19 | 20 | 12 | 14 | 11 | 4 | 11 | 6 | 11 |
| TRADE NON-FICTION | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| RELIGIOUS BOOKS | 6 | 5 | 0 | 1 | 3 | 0 | 0 | 1 | 1 |
| EDUCATIONAL SCHOOLS | 361 | 239 | 100 | 154 | 142 | 68 | 77 | 73 | 66 |
| EDUC. FET COLLEGES | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| EDUCATIONAL ABET | 3 | 2 | 6 | 0 | 5 | 0 | 0 | 0 | 0 |
| ACADEMIC TEXTBOOKS | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| ACADEMIC PROFESSIONAL | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| ACADEMIC SCHOLARLY | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **TOTAL** | **389** | **269** | **118** | **169** | **161** | **72** | **88** | **80** | **78** |

**Notes**

- IsiZulu accounts for 389 (27.55%) of all titles published in one of the African languages.
- IsiXhosa records the second highest number of new or revised titles, followed by Sesotho and Setswana.

# 13 Author profile

This section reports on the number of authors/other parties who received royalties from participating companies during the period 1 January to 31 December 2008.

*Representative nature of participation*

Not all participants were able to complete this section of the survey accurately enough to be included in the survey database. This section of the report is based on data received from the following panel of participants.

| | |
|---|---|
| NUMBER OF LOCAL PUBLISHERS | 44 |
| TOTAL TURNOVER OF LOCAL PRODUCT SALES | R 2,650,022,341 |
| SECTION PARTICIPANTS | 31 |
| TURNOVER OF SECTION PARTICIPANTS | R 1,930,296,565 |
| **% REPRESENTATION** | **72.84%** |

**Note**

- Only 31 of the 44 participants who publish local books participated in this section of the survey. On a turnover basis these participants represent 72.84% of the survey sample.

**Fig. 13.1 Number of authors and legal entities earning royalties**

| | |
|---|---|
| INDIVIDUAL AUTHORS | 16,262 |
| ESTATES ETC | 980 |

**Note**

- 16,262 of the 17,242 legal entities receiving royalties are individual authors; 980 other entities (such as deceased estates, trusts or NGO's) also collect royalties.

**Fig. 13.2 Demographic profile of individual authors earning royalties**

| AUTHOR DEMOGRAPHICS | ALL | GENERAL TRADE | RELIGIOUS TRADE | EDUCATION | ACADEMIC |
|---|---|---|---|---|---|
| BLACK MALE | 2,549 | 72 | 1 | 2,127 | 244 |
| BLACK FEMALE | 1,813 | 71 | 1 | 1,500 | 179 |
| SUB-TOTAL BLACK | 4,362 | 143 | 2 | 3,627 | 423 |
| WHITE MALE | 4,459 | 965 | 149 | 1,791 | 1,556 |
| WHITE FEMALE | 5,624 | 1,315 | 29 | 3,058 | 909 |
| SUB-TOTAL WHITE | 10,359 | 2,280 | 178 | 4,849 | 2,465 |
| **TOTAL ALL INDIVIDUAL AUTHORS** | **14,874** | **2,423** | **180** | **8,476** | **2,888** |

**Notes**

- It must be noted that various publishers can publish the same author(s) and that the "author pool" can only be accurately established by means of the construction of a national author database.
- In the education sub-sector, the largest local publishing sector and the one in which equity has been pursued most actively, the ratio black versus white authors, has developed the most in terms of representing the population profile.
- The ratio white versus black authors is still far from representative of the population profile in the trade sub-sector and the academic sub-sector.

## 14 Royalty profile

This section reports on royalties paid to authors during the period 1 January to 31 December 2008.

*Representative nature of participation*

Not all participants were able to complete this section of the survey accurately enough to be included in the survey database. This section of the report is based on data received from the following panel of participants.

| | |
|---|---|
| NUMBER OF LOCAL PUBLISHERS | 44 |
| TURNOVER LOCAL PRODUCT SALES | R 2,650,022,341 |
| SECTION PARTICIPANTS | 37 |
| TURNOVER SECTION PARTICIPANTS | R 2,279,171,949 |
| **% REPRESENTATION** | **86.01%** |

### Notes

- Only 37 of the 44 participants engaged in local publishing completed this section of the survey.
- On a turnover basis, these 37 participants represent 86.01% of the total survey sample.

### Fig. 14.1 Royalty profile of local publishers

| ROYALTY PROFILE | NET TURNOVER | ROYALTY PAID | % ROYALTY ON TURNOVER |
|---|---|---|---|
| GENERAL TRADE | R 269,908,132 | R 38,305,252 | 14.19% |
| RELIGIOUS TRADE | R 104,255,266 | R 7,151,386 | 6.86% |
| EDUCATIONAL | R 1,681,188,672 | R 214,928,288 | 12.78% |
| ACADEMIC | R 121,539,648 | R 20,010,521 | 16.46% |
| **TOTAL** | **R 2,176,891,718** | **R 280,395,447** | **12.88%** |

**Notes**

- Not all recorded sales are subjected to royalty payments. This is due to the fact that some survey participants record turnover on distribution of products, published by other publishers who are responsible for the payment of royalties. The sales in all such cases are removed from the data of total sales. Net turnover for local books was R 2,176,891,718.
- Some titles are published on a contract basis, with a fixed royalty fee being paid in previous years.
- The survey cannot account for advanced royalties paid during 2008 for future sales; for the offset of past advances against current year sales; and for royalties written off as unrecoverable.
- A number of co-publications of South African publishers with overseas principals are reported as local publications, but carry no separate royalties on sales, as these are included in the purchase price.
- A number of academic books are published on a profit-sharing basis not directly linked to sales volumes or values. This also applies to some self-publishers in the trade sub-sector.

## 15 Legal status and ownership profile

This section reports on the legal status of the participants and the ownership profile of these companies during 2008.

**Fig. 15.1 Legal status and ownership according to industry sub-sector**

| LEGAL STATUS | ALL | GENERAL TRADE | RELIGIOUS TRADE | EDUCATION | ACADEMIC |
|---|---|---|---|---|---|
| NUMBER OF PARTICIPANTS | 51 | 22 | 5 | 15 | 9 |
| | | | | | |
| SOLE PROPRIETOR | 5 | 4 | 0 | 0 | 1 |
| CLOSED CORPORATION | 4 | 2 | 0 | 1 | 1 |
| PARTNERSHIP | 1 | 1 | 0 | 0 | 0 |
| PRIVATE COMPANY | 30 | 13 | 3 | 11 | 3 |
| PUBLIC COMPANY | 5 | 2 | 0 | 2 | 1 |
| SECTION 21 COMPANY | 2 | 0 | 2 | 0 | 0 |
| PUBLIC BENEFIT ORGANIZATION | 4 | 0 | 0 | 1 | 3 |

**Note**

- All 51 survey participants completed this section of the survey.

**Fig. 15.2 Ownership majority according to industry sub-sector**

| OWNERSHIP MAJORITY | ALL | GENERAL TRADE | RELIGIOUS TRADE | EDUCATION | ACADEMIC |
|---|---|---|---|---|---|
| **INDIVIDUAL OWNERSHIP** | 22 | 12 | 1 | 7 | 2 |
| BLACK MALE | 2 | 0 | 0 | 2 | 0 |
| BLACK FEMALE | 0 | 0 | 0 | 0 | 0 |
| WHITE MALE | 12 | 7 | 1 | 3 | 1 |
| WHITE FEMALE | 8 | 5 | 0 | 2 | 1 |
| FOREIGN | 0 | 0 | 0 | 0 | 0 |
| | | | | | |
| **CORPORATE OWNERSHIP** | 29 | 10 | 3 | 8 | 8 |
| LOCAL | 17 | 6 | 2 | 3 | 6 |
| FOREIGN | 12 | 4 | 1 | 5 | 2 |

**Notes**

- Corporations own 29 of the 51 participating entities and individuals own 22.
- Foreign corporations own 12 participating entities.
- All individual owners are South African citizens.
- 12 of the 22 companies owned by individuals are owned by a majority of white males, and eight by a majority of white females.

**Fig. 15.3 Equity profile according to industry sub-sector**

| EQUITY PROFILE | ALL | GENERAL TRADE | RELIGIOUS TRADE | EDUCATION | ACADEMIC |
|---|---|---|---|---|---|
| NUMBER OF PARTICIPANTS | 41 | 18 | 4 | 11 | 8 |
| | | | | | |
| EXTERNALLY RATED | 25 | 8 | 3 | 10 | 4 |
| NOT RATED | 6 | 6 | 0 | 0 | 0 |
| EXEMPTED | 10 | 4 | 1 | 1 | 4 |
| | | | | | |
| **BBBEE RATING** | 25 | 8 | 3 | 10 | 4 |
| | | | | | |
| LEVEL 1 >100% AAA | 0 | 0 | 0 | 0 | 0 |
| LEVEL 2 85 - 100% AA | 1 | 0 | 0 | 1 | 0 |
| LEVEL 3 75 - 85% A | 1 | 0 | 0 | 1 | 0 |
| LEVEL 4 65 - 75% BBB | 7 | 3 | 0 | 3 | 1 |
| LEVEL 5 55 - 65% BB | 5 | 1 | 0 | 2 | 2 |
| LEVEL 6 45 - 55% B | 7 | 3 | 1 | 2 | 1 |
| LEVEL 7 40 - 45% C | 0 | 0 | 0 | 0 | 0 |
| LEVEL 8 30 - 40% D | 3 | 1 | 1 | 1 | 0 |
| NOT COMPLIANT <30% E / FF | 1 | 0 | 1 | 0 | 0 |

**Notes**

- 41 of the 51 survey participants completed the section on equity profile.
- 10 of these are exempted from compliance with BBBEE regulations because their turnover is below the required minimum.
- Companies in the education sub-sector have on average the highest BBBEE ratings.

**Fig. 15.4 Socio-economic development expenditure according to industry sub-sector**

| SOCIO-ECONOMIC DEVELOPMENT | ALL | GENERAL TRADE | RELIGIOUS TRADE | EDUCATION | ACADEMIC |
|---|---|---|---|---|---|
| NUMBER OF PARTICIPANTS | 15 | 3 | 0 | 8 | 4 |
| | | | | | |
| **EXPENDITURE AS % OF PROFIT** | | | | | |
| | | | | | |
| LESS THAN 2.5% | 2 | 1 | 0 | 1 | 0 |
| 2.5% TO 4.9% | 10 | 1 | 0 | 6 | 3 |
| 5.0% TO 7.5% | 1 | 1 | 0 | 0 | 0 |
| 7.5% TO 9.9% | 0 | 0 | 0 | 0 | 0 |
| 10% OR MORE | 2 | 0 | 0 | 1 | 1 |

**Notes**

- 15 out of the 51 survey participants completed this section of the survey.
- Most companies spent between 2,5% and 4,9% of their profits on social-economic development.

**Fig. 15.5 Training expenditure according to industry sub-sector**

| TRAINING EXPENDITURE | ALL | GENERAL TRADE | RELIGIOUS TRADE | EDUCATION | ACADEMIC |
|---|---|---|---|---|---|
| NUMBER OF PARTICIPANTS | 22 | 9 | 1 | 8 | 4 |
| | | | | | |
| **% PAYROLL ON BLACK EMPLOYEES** | | | | | |
| LESS THAN 0.5% | 4 | 3 | 1 | 0 | 0 |
| 0.5% TO 0.99% | 3 | 2 | 0 | 1 | 0 |
| 1% TO 1,99% | 11 | 2 | 0 | 5 | 4 |
| 2% TO 2.5% | 2 | 2 | 0 | 0 | 0 |
| | | | | | |
| **% PAYROLL ON WHITE EMPLOYEES** | | | | | |
| LESS THAN 0.5% | 13 | 8 | 1 | 3 | 1 |
| 0.5% TO 0.99% | 3 | 1 | 0 | 0 | 2 |
| 1% TO 1,99% | 6 | 0 | 0 | 5 | 1 |
| 2% TO 2.5% | 0 | 0 | 0 | 0 | 0 |

**Notes**

- 22 participants completed this section of the survey
- Participants in the education sub-sector spent more on training of both black and white employees than the participants in the other sub-sectors.
- Most companies spent more on training of black employees than on training of white employees.

# 16 Employment profile of permanent employees

This section reports on the employment profile of the industry in terms of population group and gender, as well as the employment profile according to industry sub-sector during 2008.

*Representative nature of participation*

Not all participants were able to complete this section of the survey accurately enough to be included in the survey database. This section of the report is based on data received from the following panel of participants.

| | |
|---|---|
| NUMBER OF PARTICIPANTS | 51 |
| TURNOVER OF PARTICIPANTS | R 3,457,976,842 |
| SECTION PARTICIPANTS | 50 |
| TNT SECTION PARTICIPANTS | R 3,425,159,342 |
| **% REPRESENTATION** | **99.05%** |

## 16.1 All permanent employees

**Fig. 16.1 Employee profile according to race and gender**

| EMPLOYMENT PROFILE | BLACK MALE | BLACK FEMALE | WHITE MALE | WHITE FEMALE | ALL |
|---|---|---|---|---|---|
| SENIOR TOP EXECUTIVES | 15 | 10 | 57 | 51 | 133 |
| OTHER TOP MANAGERS | 62 | 36 | 88 | 133 | 319 |
| EDITORIAL | 21 | 96 | 30 | 168 | 315 |
| DESIGN AND PRODUCTION | 28 | 54 | 30 | 75 | 187 |
| MARKETING AND SALES | 141 | 206 | 41 | 179 | 567 |
| FINANCE | 22 | 110 | 13 | 57 | 202 |
| HUMAN RESOURCES | 2 | 10 | 1 | 11 | 24 |
| OFFICE ADMINISTRATION | 42 | 194 | 5 | 120 | 361 |
| INFORMATION TECHNOLOGY | 12 | 8 | 20 | 2 | 42 |
| OTHER | 177 | 113 | 7 | 33 | 330 |
| **TOTAL** | **522** | **837** | **292** | **829** | **2,480** |

**Notes**

- One medium company did not complete this section of the survey.
- The 50 participants employ a total of 2,480 permanent employees.

**Fig. 16.2 Employment profile: percentage contribution according to race and gender**

| % CONTRIBUTION TO TOTAL EMPLOYMENT | BLACK MALE | BLACK FEMALE | WHITE MALE | WHITE FEMALE |
|---|---|---|---|---|
| SENIOR TOP EXECUTIVES | 11.28% | 7.52% | 42.86% | 38.35% |
| OTHER TOP MANAGERS | 19.44% | 11.29% | 27.59% | 41.69% |
| EDITORIAL | 6.67% | 30.48% | 9.52% | 53.33% |
| DESIGN AND PRODUCTION | 14.97% | 28.88% | 16.04% | 40.11% |
| MARKETING AND SALES | 24.87% | 36.33% | 7.23% | 31.57% |
| FINANCE | 10.89% | 54.46% | 6.44% | 28.22% |
| HUMAN RESOURCES | 8.33% | 41.67% | 4.17% | 45.83% |
| OFFICE ADMINISTRATION | 11.63% | 53.74% | 1.39% | 33.24% |
| INFORMATION TECHNOLOGY | 28.57% | 19.05% | 47.62% | 4.76% |
| OTHER | 53.64% | 34.24% | 2.12% | 10.00% |
| **TOTAL** | **21.05%** | **33.75%** | **11.77%** | **33.43%** |

**Notes**

- 67.18% of all employees are female.
- Black males make up 21,05% of the total employment numbers, and white males 11.77%.

## 16.2 Industry sub-sector

*Representative nature of participation*

Not all participants were able to complete this section of the survey accurately enough to be included in the survey database. This section of the report is based on data received from the following panel of participants.

| EMPLOYMENT PROFILE ACCORDING TO INDUSTRY SUB-SECTOR | GENERAL TRADE | RELIGIOUS TRADE | EDUCATION | ACADEMIC |
|---|---|---|---|---|
| | | | | |
| NUMBER OF PARTICIPANTS | 22 | 5 | 15 | 9 |
| TURNOVER OF PARTICIPANTS | R 797,721,669 | R 285,286,222 | R 1,812,092,916 | R 562,876,035 |
| SECTION PARTICIPANTS | 22 | 5 | 14 | 9 |
| TURNOVER OF SECTION PARTICIPANTS | R 797,721,669 | R 285,286,222 | R 1,779,275,416 | R 562,876,035 |
| **% REPRESENTATION** | **100.00%** | **100.00%** | **98.19%** | **100.00%** |

## Fig.16 3 Employment profile according to employment category and industry sub-sector

| EMPLOYMENT PROFILE ACCORDING TO INDUSTRY SUB-SECTOR | ALL | GENERAL TRADE | RELIGIOUS TRADE | EDUCATION | ACADEMIC |
|---|---|---|---|---|---|
| **BLACK MALE** | | | | | |
| SENIOR TOP EXECUTIVES | 15 | 0 | 0 | 11 | 4 |
| OTHER TOP MANAGERS | 62 | 7 | 5 | 40 | 10 |
| EDITORIAL | 21 | 0 | 2 | 11 | 8 |
| DESIGN AND PRODUCTION | 28 | 6 | 1 | 11 | 10 |
| MARKETING AND SALES | 141 | 18 | 5 | 98 | 20 |
| FINANCE | 22 | 3 | 12 | 3 | 4 |
| HUMAN RESOURCES | 2 | 0 | 2 | 0 | 0 |
| OFFICE ADMINISTRATION | 42 | 11 | 0 | 17 | 14 |
| INFORMATION TECHNOLOGY | 12 | 0 | 2 | 5 | 5 |
| OTHER | 177 | 21 | 40 | 73 | 43 |
| TOTAL | 522 | 66 | 69 | 269 | 118 |
| **BLACK FEMALE** | | | | | |
| SENIOR TOP EXECUTIVES | 10 | 1 | 0 | 4 | 5 |
| OTHER TOP MANAGERS | 36 | 4 | 1 | 24 | 7 |
| EDITORIAL | 96 | 7 | 1 | 36 | 52 |
| DESIGN AND PRODUCTION | 54 | 8 | 4 | 19 | 23 |
| MARKETING AND SALES | 206 | 47 | 7 | 95 | 57 |
| FINANCE | 110 | 21 | 12 | 49 | 28 |
| HUMAN RESOURCES | 10 | 0 | 2 | 5 | 3 |
| OFFICE ADMINISTRATION | 194 | 55 | 2 | 72 | 65 |
| INFORMATION TECHNOLOGY | 8 | 1 | 0 | 5 | 2 |
| OTHER | 113 | 8 | 27 | 56 | 22 |
| TOTAL | 837 | 152 | 56 | 365 | 264 |
| **WHITE MALE** | | | | | |
| SENIOR TOP EXECUTIVES | 57 | 20 | 11 | 14 | 12 |
| OTHER TOP MANAGERS | 88 | 14 | 30 | 28 | 16 |
| EDITORIAL | 30 | 10 | 2 | 10 | 8 |
| DESIGN AND PRODUCTION | 30 | 9 | 5 | 11 | 5 |
| MARKETING AND SALES | 41 | 14 | 8 | 8 | 11 |
| FINANCE | 13 | 2 | 10 | 0 | 1 |
| HUMAN RESOURCES | 1 | 0 | 0 | 0 | 1 |
| OFFICE ADMINISTRATION | 5 | 1 | 0 | 3 | 1 |
| INFORMATION TECHNOLOGY | 20 | 2 | 3 | 9 | 6 |
| OTHER | 7 | 0 | 3 | 2 | 2 |
| TOTAL | 292 | 72 | 72 | 85 | 63 |

| | | | | | |
|---|---|---|---|---|---|
| **WHITE FEMALE** | | | | | |
| SENIOR TOP EXECUTIVES | 51 | 22 | 8 | 16 | 5 |
| OTHER TOP MANAGERS | 133 | 38 | 4 | 56 | 35 |
| EDITORIAL | 168 | 48 | 21 | 62 | 37 |
| DESIGN AND PRODUCTION | 75 | 22 | 17 | 20 | 16 |
| MARKETING AND SALES | 179 | 78 | 33 | 21 | 47 |
| FINANCE | 57 | 12 | 24 | 11 | 10 |
| HUMAN RESOURCES | 11 | 2 | 4 | 4 | 1 |
| OFFICE ADMINISTRATION | 120 | 32 | 29 | 29 | 30 |
| INFORMATION TECHNOLOGY | 2 | 0 | 0 | 1 | 1 |
| OTHER | 33 | 2 | 22 | 4 | 5 |
| TOTAL | 829 | 256 | 162 | 224 | 187 |
| **ALL PERMANENT EMPLOYEES** | | | | | |
| SENIOR TOP EXECUTIVES | 133 | 43 | 19 | 45 | 26 |
| OTHER TOP MANAGERS | 319 | 63 | 40 | 148 | 68 |
| EDITORIAL | 315 | 65 | 26 | 119 | 105 |
| DESIGN AND PRODUCTION | 187 | 45 | 27 | 61 | 54 |
| MARKETING AND SALES | 567 | 157 | 53 | 222 | 135 |
| FINANCE | 202 | 38 | 58 | 63 | 43 |
| HUMAN RESOURCES | 24 | 2 | 8 | 9 | 5 |
| OFFICE ADMINISTRATION | 361 | 99 | 31 | 121 | 110 |
| INFORMATION TECHNOLOGY | 42 | 3 | 5 | 20 | 14 |
| OTHER | 330 | 31 | 92 | 135 | 72 |
| TOTAL | 2,480 | 546 | 359 | 943 | 632 |

## Notes

- 50 of the participating 51 suppliers provided data on employment.
- The category “Senior Top Executives” includes people on CEO, COO and CFO at both holding company and business unit level.
- The category “Other Top Managers” includes managers of functional departments such as marketing, production, human resources, warehousing etc.

## 17 Final remarks

- Notwithstanding the fact that the report does not contain data from all 96 entities that formed the core list of the 2008 survey, feedback from the 20 medium and 18 large entities included in the report ensure that it constitutes a representative perspective on the shape and size of the book publishing industry.
- Based on the reported total net turnover of 51 entities and the estimated maximum total net turnover of the remaining 45 entities in the core sample the reported turnover profile represents 93.88% of the sample. Excluding the indent import agencies included in the core sample, the survey participants represent 98.16 % of the local book supply industry.
- By expanding the scope of the total market sample to include foreign book suppliers that compete with local book suppliers in supplying the total market for books in South Africa, the reported turnover profile represents 84.77% of the total market for books and book related products.
- Broad trends (including comparable growth patterns) based on the feedback of the entities that participated in both the 2007 and 2008 surveys will be tabled in a separate *Broad Trends Report 2007-2008* after the *Annual Book Publishing Industry Survey 2008 Report* has been approved by the Executive Committee of PASA.
- The research team trusts that all publishers will be convinced of the usefulness of the data, and that all relevant industry role-players will participate in future.

**Francis Galloway**
**Willem Struik**

**November 2009**

# Appendix 1 Survey process

## A1.1 Data collection

The 2008 survey questionnaire and a covering letter from the PASA Executive Committee, which contextualises the *Annual Book Publishing Industry Survey*, were sent to all PASA members and entities on the core list on 16 March 2009. It was stipulated that the completed questionnaire had to be returned to one of the research analysts via a dedicated e-mail address or by registered post before or on the cut-off date of 31 May 2009.

Various steps were taken to enlist the co-operation of all relevant role-players. By 26 June 2009 only 18 completed questionnaires were 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 29 July 2009 a total of 37 completed questionnaires have been received. Non-responding companies on the core list were once again contacted by phone and by e-mail and an extended deadline was set for 31 August 2009. By the end of September all but one of the key role-players on the core list had completed and returned the questionnaire. After consultation with the PASA office it was agreed that the data collection process would cease since the feedback was now regarded as representative of the companies in the higher turnover bands of the industry. The research team could then aggregate and analyse the data and compile the report.

The research team received 51 completed questionnaires and all of these are included in the analysis. The receipt of each questionnaire was individually acknowledged via e-mail or telephone and kept on record.

32 of the 64 entities on the core list participated in the *Snapshot Survey 2002*, representing 50% of the sample and 97% of the estimated total net turnover of the targeted entities. 25 of the 54 entities on the core list participated in the *Snapshot Survey 2003*, representing 46% of the sample and 97.82% of the estimated total net turnover of the targeted entities. The core list of the *Annual Industry Survey 2004* the was expanded to include more entities that are involved in other types of business activities, (e.g. the publishing and distribution of non-book products). 28 of the 80 entities on the core list participated, representing 32.5% of the sample and 94.43% of the estimated total net turnover of the targeted entities. 32 of 85 entities on the core list participated in the *Annual Industry Survey 2005*, representing 37.65% of the

sample and 95.04% of the estimated total net turnover of the targeted entities. 36 of the 99 entities on the core list participated in the *Annual Industry Survey 2006*, representing 36.36% of the targeted sample and 92.95% of the estimated total net turnover of the targeted entities. 34 of the core list of 115 entities participated in the *Annual Industry Survey 2007*, representing 29.56% of the targeted sample and 93.58**%** of the estimated total net turnover of the targeted entities.

51 of the 96 entities on the core list participated in the *Annual Industry Survey 2008*, representing **53.13%** of the targeted sample and **92.81%** of the estimated total net turnover of the targeted entities.

### A1.2 Data capturing

The data collected from the 51 questionnaires was captured in Excel as part of the book publishing industry database. Several security measures ensure the confidentiality of the data, both in paper and electronic format.

The captured data was aggregated in a number of different ways: according to the size of a participating entity in terms of net turnover; according to the industry sub-sector in which it operates, and according to supplier category.

*According to size*

Following the procedure instituted for the previous six surveys, the 96 entities on the core list for the 2008 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, or calculated by other means.) The entities were then organised into three basic categories: LARGE (entities with an annual turnover of more than R 50 million), MEDIUM (entities with an annual turnover of between R 5 million and R 49, 999,000) and SMALL (entities with an annual turnover of less than R 5 million).

*According to industry sub-sector*

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 according to industry sub-sector in much more detail than in the past.

*According to supplier category*

Each participant of the survey was categorised as a LOCAL PUBLISHER, a LOCAL PUBLISHER AND DISTRIBUTOR, a LOCAL DISTRIBUTOR OF IMPORTED BOOKS, or an INDENT AGENCY for overseas publishers or distributors. Since each participant could fall into only one category, it was possible to aggregate the returns of the participants according to supplier category.

### A1.3 Data analysis

Data from the 51 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, rests on the assumed accuracy of the data received from the participants.**

# Appendix 2 Supplier categories

Previous surveys distinguished between locally published and imported books, without reference to the suppliers of such books into the market. The researchers recognised that the South African book market is not served only by the South African publishing and bookselling industry, but also by foreign suppliers distributing their products directly to booksellers, libraries and the general public. This survey distinguishes between the local suppliers of imported books, and the foreign suppliers who bypass local distributors and distribute their products directly into the market.

## A2.1 Supplier categories presented in South Africa

The following categories of book suppliers active in the South African market are included in this survey:

- Local book publishers only
- Local book publishers and distributors
- Local book distributors only
- Indent agencies for overseas book publishers.

**Local book publishers only** publish and distribute their own product directly to the trade. They may or may not use an outsourced warehouse and logistical service deliverer but they market and sell their books using their own staff and infrastructure.

**Local publishers and book distributors** publish and distribute their own books, but in addition to that they represent other local and/or overseas book publishers in the South African industry as far as warehousing, sales and marketing are concerned.

**Local book distributors only** do not publish their own books, but represent local and/or overseas publishers as far as sales and marketing are concerned. Books are supplied from a local warehouse and booksellers and libraries are invoiced in South African currency. In many cases the warehousing function is outsourced to a third party.

**Indent agencies** represent one or more of the larger overseas publishers in terms of marketing. Orders are taken locally, but then passed on to the overseas principals by indent, and are supplied in foreign currency from a warehouse abroad. These agencies are prominent in the academic sub-sector, and usually consist of only a few sales managers operating in the whole of southern Africa or even further in Africa. One significant player supplies to the retail trade (Peter Matthews Agencies), but most major indent agencies are active in the academic sub-sector: Cengage Learning (formerly Thompson International); Elzevier Scientific; John Wiley & Son; Kluwer Health; Lippincott-Williams & Wilkins; Palgrave-Macmillan; McGraw-Hill Educational. Although all of these suppliers were invited to participate in the survey, none of them did so.

## A2.2 Supplier categories not represented in South Africa

South African booksellers, especially in the academic sub-sector, also source books from suppliers not represented in South Africa but their contribution to the market is not represented in this survey. The following kinds of direct overseas suppliers are distinguished:

- Overseas agencies for overseas publishers
- Overseas order consolidators or wholesalers for overseas publishers
- Overseas publishers supplying the local market directly
- Overseas Internet booksellers
- Overseas library suppliers.

A number of booksellers place orders with small and specialised overseas publishers directly. Both trade and academic booksellers follow this route albeit to a very limited extent. Some trade booksellers buy remainder books directly from remainder jobbers abroad. The major overseas direct suppliers are active in the academic sector:
Amcorp; Alexander Quaynor; Baker & Taylor; Baker & Francis; CELF; European School Books; Gardners; Ingrams USA; Koch; Librera Bosch; MH Service (India); Marston Book Services; New Jersey Book Agency; Plymbridge; Sweet & Maxwell; Swets Information Services.

There are academic libraries that import books directly from highly specialised library suppliers abroad, or via the Internet. The following overseas library suppliers make a significant contribution to academic library purchases: Ambassador; Askews; Blackwells; Dawsons; Gardners; Lindsey & Croft.

Some overseas book suppliers supply South African end-users directly, bypassing local distributors and booksellers. As no reliable data exists on this type of trade, no attempt is made to quantify it.

# Appendix 3 Suppliers on the core list

The research team approached the most prominent booksellers in each of the book industry sub-sectors, as well as a number of larger public and academic libraries, and requested them to supply the team with information on their major book suppliers during 2008 and on the share each of these suppliers contributed to their annual purchases. The research team utilised this information to identify the **significant suppliers** in the sub-sectors and to estimate the monetary value of the sub-sectors.

Suppliers were deemed **significant** if they contribute more than 0,5% to the total annual purchases of the leading booksellers consulted. All those falling within the four supplier categories represented in South Africa (see Appendix 2) are regarded as contributing to the local book publishing industry and were invited to participate in the survey. Indent agents, however, reported that since they do not keep detailed records of the orders they indent through to their principals, they are unable to participate in the survey. However, since the value of the leading bookseller purchases from each supplier was known, the contribution of such sales to total industry sales could be estimated with a reasonable amount of accuracy.

Various publishers, book distributors and import agencies that are not members of PASA were identified as significant contributors to the industry, and were therefore invited to participate.

**Fig. A3.1 Core list suppliers who are not PASA members: general trade**

| ***Publishers*** | ***Distributors and/or import agencies*** |
|---|---|
| Creative Global Solutions | Alternative Books |
| Don Nelson Publishers | Everybody's Books |
| Fantasi Boeke | Faradawn |
| Fernwood Press | Hargraves Library Suppliers |
| Francolin Publishers | Independent Publishers |
| Galapo Publications | Jacklin Enterprises |
| Metz Publishers | Peter Matthews Agencies |
| Naledi Publishers | PSD |
| Hay House South Africa | RNA |
| | Titles |
| | Trinity Books |

**Fig. A3.2 Core list suppliers who are not PASA members: religious trade**

| ***Publishers*** | ***Distributors and/or import agencies*** |
|---|---|
| Bible Society of South Africa<br>Carpe Diem<br>Christian Art / CUM Publishers<br>Derek Prince Ministries<br>Methodist Publishing House<br>Sovereign Media<br>Lux Verbi | None |

**Fig. A3.3 Core list suppliers who are not PASA members: education**

| ***Publishers*** | ***Distributors and/or import agencies*** |
|---|---|
| Future Entrepreneurs<br>HSE CC<br>Zytech Publishers | None |

**Fig. A3.4 Core list suppliers who are not PASA members: academic**

| ***Publishers*** | ***Distributors and/or import agencies*** |
|---|---|
| Knowledge Resources<br>Publitech<br>Hedron Tax Consulting and Publishing | Cengage Learning (ex Thompson International)<br>Elzevier Scientific<br>John Wiley & Son<br>Intersoft<br>Lippincott-Williams & Wilkin<br>McGraw Hill Educational<br>Palgrave-Macmillan |

The research team set itself three strategic goals as far as participation was concerned:

- To retain as many of previous participants as possible
- To persuade all the large and medium companies on the core list to participate, and
- To persuade role-players in certain niche markets to participate in order to achieve a more balanced overview of the industry (the niche markets selected are religious trade books, scholarly books, FET textbooks and ABET workbooks).

Of the identified 277 small publishers, only 45 were added to the core list. These included all companies active in the niche markets as indicated above, all previous survey participants and PASA members who voluntary contributed their data. All PASA members were invited to participate, and three who would not have been included in the core list based on the criteria described above, responded and were added to the core list.

# Appendix 4 Holding companies and their subsidiaries

This survey collected data at the business unit level rather than the holding company level to enhance the analysis and to accommodate the merger, restructuring and selling off of subsidiaries in the longer term.

The following participants represent the following holding companies

**New Holland Group**

- Random Struik
- Struik Christian Books
- Map Studio

**Nasionale Group**

- NB Publishers
- Jonathan Ball
- Lux Verbi
- Van Schaik Publishers
- Nasou Via Afrika
- Stimela
- Best Books

**Maskew Miller Longman**

- Maskew Miller Longman
- Pearson Educational South Africa
- Heinemann

**Macmillan**

- Macmillan SA
- Pan Macmillan SA

# Appendix 5 Estimated net turnover values of non-participating suppliers

The research team has to estimate the net turnover of the suppliers that did not participate in the survey in order to estimate the total net turnover of the three sub-sectors of the industry. Various methods, based on the availability of data, were used for the three sub-sectors.

## A5.1 Trade and academic sub-sectors

The research team used the following sources to estimate the total turnover of the trade sub-sector and, to a lesser degree, the total turnover of the academic sub-sector:

- The Nielsen Bookscan South Africa report (NBSSA 2008), *2008 Standard Executive Report for the 52-week period* (published in January 2009).
- The *Annual Book Trade Industry Survey 2008* (ABTIS 2008).
- Purchase data provided by a major academic bookseller not presented in NBSSA.

NBSSA collects retail sales data from participating booksellers and aggregates the data by supplier (which they call “publisher representative group”). For the trade sector and to a lesser extent for the academic sector each supplier’s market share was determined from the *2008 Standard Executive Report for the 52-week period* published in January 2009.]

The NBSSA panel of participating booksellers does not include all trade role-players. Major bookseller groups, such as Estoril Books and Airport Retail Concessions, and major book clubs, such as Jacklin Enterprises, are not included in the panel. However, from the relative market shares of the bookseller groups as calculated from the sales data supplied by the leading trade publishers, the representative nature of the NBSSA panel could be calculated in order to do extrapolate the NBSSA turnover values to total industry turnovers.

The NBSSA database also does not capture all sales via the participating booksellers, since sales of titles with incomplete or incorrect bibliographical data are not recorded. The sales recorded by NBSSA per bookseller were compared with the sales reported by these booksellers to the *Annual Book Trade Industry Survey 2008* (ABTIS 2008) to reveal the extent of under-reported sales.

The above two factors were then applied to extrapolate the NBSSA sales values to estimated industry retail values. The estimated turnover of the non-participating suppliers could hence be determined.

The NBSSA panel represents more than 75% of all trade book sales, and these extrapolated industry turnover values are considered to be highly accurate. The NBSSA panel, however, represents only 27% of the academic booksellers' sales, which makes the extrapolation to total industry turnover less accurate. However, this is compensated for by the purchase data of the dominant academic bookseller (not a member of NBSSA). (See **Appendix 3.)**

In the ABTIS 2008 report booksellers indicated the value of their direct purchases from overseas suppliers and expressed these as a percentage of total purchase values per industry sub-sector. These percentages were used to estimate the value of all direct supplies by overseas suppliers.

### A5.2 Education sub-sector

The research team could not utilise the NBSSA and ABTIS reports to estimate the turnover of the educational sub-sector since these reports do not reflect sales of education product. It is, however, generally accepted that almost all educational publishers are members of PASA, and that South African book suppliers supply most educational books. Therefore the *PASA Directory* and the membership fee structure were the key sources for this exercise.

The PASA directory lists all PASA members and it was used to identify the significant education companies. The directory contains basic data regarding the sub-sector in which publishers and distributors operate, their annual title output, staffing levels, and ownership. Members are placed into membership bands depending on the reported annual net sales of the enterprises. A net sales value of 80% of the income band was set to estimate the net sales value of each non-participant. All the data for non-participant PASA members were aggregated per sub-sector to obtain an overview of the industry as a whole and of the education sub-sector specifically.

### A5.3 Production, employment and turnover profiles of companies that did not participate (PASA members)

By utilising the PASA Directory and the membership structure the research team could estimate the production, employment and turnover profiles of the companies that are members of PASA but did not participate in the survey.

**Fig. A5.1 Profile of PASA members that did not participate: Medium companies – local publishers**

| | NUMBER OF NON-PARTI-CIPANTS | NUMBER OF NEW TITLES PER ANNUM | NUMBER OF EMPLOYEES | ESTIMATED NET TURNOVER Values in R'000 |
|---|---|---|---|---|
| MAINLY TRADE | 1 | 225 | 30 | R15 900 |
| MAINLY EDUCATIONAL | 4 | 244 | 46 | R55 999 |
| MAINLY ACADEMIC | 0 | 0 | 0 | 0 |
| TOTAL OF NON-PARTICIPANTS | 5 | 469 | 76 | R71 899 |

**Fig. A5.2 Profile of PASA members that did not participate: Small companies – local publishers**

| | NUMBER OF NON-PARTI-CIPANTS | NUMBER OF NEW TITLES PER ANNUM | NUMBER OF EMPLOYEES | ESTIMATED NET TURNOVER Values in R'000 |
|---|---|---|---|---|
| MAINLY TRADE | 16 | 91 | 33 | R3 344 |
| MAINLY EDUCATIONAL | 64 | 1 412 | 310 | R68 856 |
| MAINLY ACADEMIC | 3 | 52 | 15 | R3 317 |
| TOTAL OF NON-PARTICIPANTS | 83 | 1 555 | 358 | R75 517 |

**Fig. A5.3 Profile of PASA members that did not participate: Small companies – local distributors**

| | NUMBER OF NON-PARTI-CIPANTS | NUMBER OF NEW TITLES PER ANNUM | NUMBER OF EMPLOYEES | ESTIMATED NET TURNOVER Values in R'000 |
|---|---|---|---|---|
| MAINLY TRADE | | | | |
| MAINLY EDUCATIONAL | 3 | 0 | 10 | R4 477 |
| MAINLY ACADEMIC | 0 | 0 | 0 | R 0 |
| TOTAL OF NON-PARTICIPANTS | 3 | 0 | 10 | R4 477 |

## A5.4 Turnover profile of companies that did not participate (not PASA members)

By utilising the NBSSA and ABTIS reports as well as other sources such as information provided by booksellers to the research team, the research team could estimate the turnover profile of the companies that are not members of PASA and did not participate in the survey.

**Fig. A5.4 Profile of companies that did not participate; not PASA members: trade sub-sector - small companies**

| SUPPLIER CATEGORY | NUMBER OF SUPPLIERS | ESTIMATED NET TURNOVER Values in R'000 |
|---|---|---|
| LOCAL PUBLISHER | 29 | R22 410 |
| LOCAL PUBLISHER AND DISTRIBUTOR | 0 | 0 |
| LOCAL DISTRIBUTOR | 5 | R13 093 |
| IMPORT AGENCY | 1 | R 5 576 |
| OVERSEAS DIRECT SUPPLIER* | 42 | R108 095 |
| ALL SUPPLIER CATEGORIES | 77 | R144 521 |

**Notes**

- The estimated net turnover values of the local suppliers (publishers, publishers and distributors and distributors) and the import agencies are based on the extrapolation of the NBSSA *2008 Standard Executive Report for the 52-week period* as described above.
- The total net turnover of the overseas direct suppliers is derived from the ABTIS 2008 (at 9,55% of total sub-sector purchases).

**Fig. A5.5 Profile of companies that did not participate: education sub-sector**

| SUPPLIER CATEGORY | NUMBER OF SUPPLIERS | ESTIMATED NET TURNOVER Values in R'000 |
|---|---|---|
| LOCAL PUBLISHER | 20 | R88 160 |
| LOCAL PUBLISHER AND DISTRIBUTOR | 0 | 0 |
| LOCAL DISTRIBUTOR | 0 | 0 |
| IMPORT AGENCY | 0 | 0 |
| OVERSEAS DIRECT SUPPLIER* | 0 | 0 |
| ALL SUPPLIER CATEGORIES | 20 | R88 160 |

**Notes**

- The total net turnover of the suppliers who are not PASA members and who did not participate in the survey is estimated from the relative market shares of the educational booksellers who made their purchase values for 2008 available to the research team.

**Fig. A5.6 Profile of companies that did not participate: academic sub-sector**

| SUPPLIER CATEGORY | NUMBER OF SUPPLIERS | ESTIMATED NET TURNOVER Values in R'000 |
|---|---|---|
| LOCAL PUBLISHER | 52 | R36 464 |
| LOCAL PUBLISHER AND DISTRIBUTOR | 0 | 0 |
| LOCAL DISTRIBUTOR | 2 | R2 818 |
| IMPORT AGENCY | 5 | R138 946 |
| OVERSEAS DIRECT SUPPLIER* | 27 | R35 212 |
| ALL SUPPLIER CATEGORIES | 86 | R213 440 |

**Notes**

- The total net turnover of the suppliers who are not PASA members and who did not participate in the survey is estimated from the relative market shares of the academic booksellers who made their purchase values for 2008 available to the research team.
- The total net turnover of the overseas direct suppliers is derived from the ABTIS 2008 (at 4.75% of total sub-sector purchases.

# Appendix 6 Estimated industry net turnover values per sub-sector and supplier category

By adding together the net turnover of the survey participants with the estimated net turnover of the non-participant companies, the total net turnover value of each sub-sector and each supplier category of the industry could be determined. These values are utilised in the statistical analysis to determine the representative nature of the survey.

## Fig. A6.1 Estimated total net industry turnover: trade sub-sector

| VALUES IN R ' 000 | TOTAL NET TURNOVER ACCORDING TO INDUSTRY SUB-SECTOR | | | | | |
|---|---|---|---|---|---|---|
| **TRADE SUB-SECTOR** | **LOCAL PUBLISHERS** | **LOCAL PUBL. & DIS-TRIBUTORS** | **LOCAL DISTRI-BUTORS** | **LOCAL IMPORT AGENCIES** | **OVERSEAS IMPORT SUPPLIERS** | **ALL SUPPLIER CATEGORIES** |
| **PARTICIPANTS** | | | | | | |
| NO OF LARGE COMPANIES | 1 | 6 | | | | 7 |
| NO OF MEDIUM COMPANIES | 6 | 3 | 4 | | | 13 |
| NO OF SMALL COMPANIES | 4 | 1 | 2 | | | 7 |
| TURNOVER LARGE COMPANIES | R 64,401 | R 713,793 | | | | R 778,194 |
| TURNOVER MEDIUM COMPANIES | R 84,880 | R 98,394 | R 83,428 | | | R 266,702 |
| TURNOVER SMALL COMPANIES | R 2,192 | R 3,632 | R 2,297 | | | R 8,121 |
| TOTAL TURNOVER | R 151,473 | R 815,819 | R 85,725 | | | R 1,053,017 |
| **PASA MEMBER NON-PARTICIPANTS** | | | | | | |
| NO OF LARGE COMPANIES | | | | | | |
| NO OF MEDIUM COMPANIES | | | 1 | 2 | | 3 |
| NO OF SMALL COMPANIES | 13 | | 3 | | | 16 |
| TURNOVER LARGE COMPANIES | | | | | | |
| TURNOVER MEDIUM COMPANIES | | | R 8,778 | R 15,956 | | R 24,734 |
| TURNOVER SMALL COMPANIES | R 3,344 | | R 8,796 | | | R 12,140 |
| TOTAL ESTIMATED TURNOVER | R 3,344 | | R 17,574 | R 15,956 | | R 36,874 |
| **NON-PASA MEMBER NON-PARTICIPANTS** | | | | | | |
| NO OF LARGE COMPANIES | | | | | | |
| NO OF MEDIUM COMPANIES | | | | 1 | | 1 |
| NO OF SMALL COMPANIES | 29 | | 5 | 1 | 42 | 77 |
| TURNOVER LARGE COMPANIES | | | | | | |
| TURNOVER MEDIUM COMPANIES | | | | R 5,576 | | R 5,576 |
| TURNOVER SMALL COMPANIES | R 22,410 | | R 13,093 | R 923 | R 108,095 | R 144,521 |
| TOTAL ESTIMATED TURNOVER | R 22,410 | | R 13,093 | R 6,499 | R 108,095 | R 150,097 |
| **ALL INDUSTRY ROLEPLAYERS** | | | | | | |
| NO OF LARGE COMPANIES | 1 | 6 | | | | 7 |
| NO OF MEDIUM COMPANIES | 6 | 3 | 5 | 3 | | 17 |
| NO OF SMALL COMPANIES | 46 | 1 | 10 | 1 | 42 | 100 |
| TURNOVER LARGE COMPANIES | R 64,401 | R 713,793 | | | | R 778,194 |
| TURNOVER MEDIUM COMPANIES | R 84,880 | R 98,394 | R 92,206 | R 21,532 | | R 297,012 |
| TURNOVER SMALL COMPANIES | R 27,946 | R 3,632 | R 24,186 | R 923 | R 108,095 | R 164,782 |
| **TOTAL ESTIMATED TURNOVER** | **R 177,227** | **R 815,819** | **R 116,392** | **R 22,455** | **R 108,095** | **R 1,239,988** |

## Fig. A6.2 Estimated total net industry turnover: education sub-sector

| EDUCATION SUB-SECTOR<br><br>VALUES IN R ' 000 | LOCAL PUBLISHERS | LOCAL PUBL. & DIS-TRIBUTORS | LOCAL DISTRI-BUTORS | LOCAL IMPORT AGENCIES | OVERSEAS IMPORT SUPPLIERS | ALL SUPPLIER CATEGORIES |
|---|---|---|---|---|---|---|
| **PARTICIPANTS** | | | | | | |
| NO OF LARGE COMPANIES | 1 | 8 | | | | 9 |
| NO OF MEDIUM COMPANIES | 4 | 1 | | | | 5 |
| NO OF SMALL COMPANIES | 2 | | | | | 2 |
| TURNOVER OF LARGE COMPANIES | R 53,488 | R 1,689,288 | | | | R 1,742,776 |
| TURNOVER OF MEDIUM COMPANIES | R 71,620 | R 32,818 | | | | R 104,438 |
| TURNOVER OF SMALL COMPANIES | R 988 | | | | | R 988 |
| TOTAL TURNOVER | R 126,096 | R 1,722,106 | | | | R 1,848,202 |
| **PASA MEMBER NON-PARTICIPANTS** | | | | | | |
| NO OF LARGE COMPANIES | | | | | | |
| NO OF MEDIUM COMPANIES | 4 | | | | | 4 |
| NO OF SMALL COMPANIES | 64 | | 3 | | | 67 |
| TURNOVER OF LARGE COMPANIES | | | | | | |
| TURNOVER OF MEDIUM COMPANIES | R 55,996 | | | | | R 55,996 |
| TURNOVER OF SMALL COMPANIES | R 68,856 | | R 4,477 | | | R 73,333 |
| TOTAL ESTIMATED TURNOVER | R 124,852 | | R 4,477 | | | R 129,329 |
| **NON-PASA MEMBER NON-PARTICIPANTS** | | | | | | |
| NO OF LARGE COMPANIES | | | | | | |
| NO OF MEDIUM COMPANIES | | | | | | |
| NO OF SMALL COMPANIES | 20 | | | | | 20 |
| TURNOVER OF LARGE COMPANIES | | | | | | |
| TURNOVER OF MEDIUM COMPANIES | | | | | | |
| TURNOVER OF SMALL COMPANIES | R 88,160 | | | | | R 88,160 |
| TOTAL ESTIMATED TURNOVER | R 88,160 | | | | | R 88,160 |
| **ALL INDUSTRY ROLEPLAYERS** | | | | | | |
| NO OF LARGE COMPANIES | 1 | 8 | | | | 9 |
| NO OF MEDIUM COMPANIES | 8 | 1 | | | | 9 |
| NO OF SMALL COMPANIES | 86 | | 3 | | | 89 |
| TURNOVER OF LARGE COMPANIES | R 53,488 | R 1,689,288 | | | | R 1,742,776 |
| TURNOVER OF MEDIUM COMPANIES | R 127,616 | R 32,818 | | | | R 160,434 |
| TURNOVER OF SMALL COMPANIES | R 158,004 | | R 4,477 | | | R 162,481 |
| **TOTAL ESTIMATED TURNOVER** | **R 339,108** | **R 1,722,106** | **R 4,477** | | | **R 2,065,691** |

## Fig. A6.3 Estimated total net industry turnover: academic sub-sector

| ACADEMIC SUB-SECTOR<br>VALUES IN R ' 000 | LOCAL PUBLISHERS | LOCAL PUBL. & DIS-TRIBUTORS | LOCAL DISTRI-BUTORS | LOCAL IMPORT AGENCIES | OVERSEAS IMPORT SUPPLIERS | ALL SUPPLIER CATEGORIES |
|---|---|---|---|---|---|---|
| **PARTICIPANTS** | | | | | | |
| NO OF LARGE COMPANIES | 1 | 2 | | | | 3 |
| NO OF MEDIUM COMPANIES | 1 | | | | | 1 |
| NO OF SMALL COMPANIES | 3 | | 1 | | | 4 |
| TURNOVER OF LARGE COMPANIES | R 88,314 | R 434,119 | | | | R 522,433 |
| TURNOVER OF MEDIUM COMPANIES | R 27,758 | | | | | R 27,758 |
| TURNOVER OF SMALL COMPANIES | R 4,166 | | R 2,400 | | | R 6,566 |
| TOTAL TURNOVER | R 120,238 | R 434,119 | R 2,400 | | | R 556,757 |
| **PASA MEMBER NON-PARTICIPANTS** | | | | | | |
| NO OF LARGE COMPANIES | | | | | | |
| NO OF MEDIUM COMPANIES | | | | | | |
| NO OF SMALL COMPANIES | 3 | | | | | 3 |
| TURNOVER OF LARGE COMPANIES | | | | | | |
| TURNOVER OF MEDIUM COMPANIES | | | | | | |
| TURNOVER OF SMALL COMPANIES | R 3,317 | | | | | R 3,317 |
| TOTAL ESTIMATED TURNOVER | R 3,317 | | | | | R 3,317 |
| **NON-PASA MEMBER NON-PARTICIPANTS** | | | | | | |
| NO OF LARGE COMPANIES | | | | 1 | | 1 |
| NO OF MEDIUM COMPANIES | | | | 4 | | 4 |
| NO OF SMALL COMPANIES | 52 | | 2 | | 27 | 81 |
| TURNOVER OF LARGE COMPANIES | | | | R 53,286 | | R 53,286 |
| TURNOVER OF MEDIUM COMPANIES | | | | R 85,660 | | R 85,660 |
| TURNOVER OF SMALL COMPANIES | R 36,464 | | R 2,818 | | R 35,212 | R 74,494 |
| TOTAL ESTIMATED TURNOVER | R 36,464 | | R 2,818 | R 138,946 | R 35,212 | R 213,440 |
| **ALL INDUSTRY ROLEPLAYERS** | | | | | | |
| NO OF LARGE COMPANIES | 1 | 2 | | 1 | | 4 |
| NO OF MEDIUM COMPANIES | 1 | | | 4 | | 5 |
| NO OF SMALL COMPANIES | 58 | | 3 | | 27 | 88 |
| TURNOVER OF LARGE COMPANIES | R 88,314 | R 434,119 | | R 53,286 | | R 575,719 |
| TURNOVER OF MEDIUM COMPANIES | R 27,758 | | | R 85,660 | | R 113,418 |
| TURNOVER OF SMALL COMPANIES | R 43,947 | | R 5,218 | | R 35,212 | R 84,377 |
| **TOTAL ESTIMATED TURNOVER** | **R 160,019** | **R 434,119** | **R 5,218** | **R 138,946** | **R 35,212** | **R 773,514** |

## Fig. A6.4 Estimated total net industry turnover: all sub-sectors

| ALL SUB-SECTORS<br><br>VALUES IN R ' 000 | LOCAL PUBLISHERS | LOCAL PUBL. & DIS-TRIBUTORS | LOCAL DISTRI-BUTORS | LOCAL IMPORT AGENCIES | OVERSEAS IMPORT SUPPLIERS | ALL SUPPLIER CATEGORIES |
|---|---|---|---|---|---|---|
| **PARTICIPANTS** | | | | | | |
| NO OF LARGE COMPANIES | 3 | 16 | | | | 19 |
| NO OF MEDIUM COMPANIES | 11 | 4 | 4 | | | 19 |
| NO OF SMALL COMPANIES | 9 | 1 | 3 | | | 13 |
| TURNOVER LARGE COMPANIES | R 206,203 | R 2,837,200 | | | | R 3,043,403 |
| TURNOVER MEDIUM COMPANIES | R 184,258 | R 131,212 | R 83,428 | | | R 398,898 |
| TURNOVER SMALL COMPANIES | R 7,346 | R 3,632 | R 4,697 | | | R 15,675 |
| TOTAL TURNOVER | R 397,807 | R 2,972,044 | R 88,125 | | | R 3,457,976 |
| **PASA MEMBER NON-PARTICIPANTS** | | | | | | |
| NO OF LARGE COMPANIES | | | | | | |
| NO OF MEDIUM COMPANIES | 4 | | 1 | 2 | | 7 |
| NO OF SMALL COMPANIES | 80 | | 6 | | | 86 |
| TURNOVER LARGE COMPANIES | | | | | | |
| TURNOVER MEDIUM COMPANIES | R 55,996 | | R 8,778 | R 15,956 | | R 80,730 |
| TURNOVER SMALL COMPANIES | R 75,517 | | R 13,273 | | | R 88,790 |
| TOTAL ESTIMATED TURNOVER | R 131,513 | | R 22,051 | R 15,956 | | R 169,520 |
| **NON-PASA MEMBER NON-PARTICIPANTS** | | | | | | |
| NO OF LARGE COMPANIES | | | | 1 | | 1 |
| NO OF MEDIUM COMPANIES | | | | 5 | | 5 |
| NO OF SMALL COMPANIES | 101 | | 7 | 1 | 69 | 178 |
| TURNOVER LARGE COMPANIES | | | | R 53,286 | | R 53,286 |
| TURNOVER MEDIUM COMPANIES | | | | R 91,236 | | R 91,236 |
| TURNOVER SMALL COMPANIES | R 147,034 | | R 15,911 | R 923 | R 143,307 | R 307,175 |
| TOTAL ESTIMATED TURNOVER | R 147,034 | | R 15,911 | R 145,445 | R 143,307 | R 451,697 |
| **ALL INDUSTRY ROLEPLAYERS** | | | | | | |
| NO OF LARGE COMPANIES | 3 | 16 | | 1 | | 20 |
| NO OF MEDIUM COMPANIES | 15 | 4 | 5 | 7 | | 31 |
| NO OF SMALL COMPANIES | 190 | 1 | 16 | 1 | 69 | 277 |
| TURNOVER LARGE COMPANIES | R 206,203 | R 2,837,200 | | R 53,286 | | R 3,096,689 |
| TURNOVER MEDIUM COMPANIES | R 240,254 | R 131,212 | R 92,206 | R 107,192 | | R 570,864 |
| TURNOVER SMALL COMPANIES | R 229,897 | R 3,632 | R 33,881 | R 923 | R 143,307 | R 411,640 |
| **TOTAL ESTIMATED TURNOVER** | **R 676,354** | **R 2,972,044** | **R 126,087** | **R 161,401** | **R 143,307** | **R 4,079,193** |

## Appendix 7 Sales outlet categories

| Category of sales outlet | Examples |
|---|---|
| **National Bookseller Chains** | Adams and Co., Afribooks, Airport Retail Concessions, Alibiprops, Armstrongs, Bargain Books, CNA, CUM Books, Estoril, Exclusive Books, Fascination 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 and Department Stores** | Pick n Pay, Woolworths, Shoprite/Checkers, Dischem, Transworld, Baby & Co., Waltons, Silverray etc. |
| **Internet Booksellers** | Kalahari.net, Loot, Netbooks, etc. |
| **Book Clubs and Mail Order Booksellers** | Leserskring/ Leisure Books, LAPA, 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 books to schools. |