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 African (PASA)

**PASA ANNUAL INDUSTRY SURVEY 2006**
**REPORT**

SEPTEMBER 2007

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EXECUTIVE SUMMARY

Data collection process

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

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

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

Data analysis and construction of profiles

Turnover profile

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

The combined Total Net Turnover of all participating publishers was generated from the sales of local book and non-book product (72.77%), the sales of imported book and non-book product (23.05%) and the turnover from other activities (4.18%). (See page 17.)
Total book sales (local and imported) amounted to R2,825,049,322, of which 75.53% was generated by local books and 24.47% by imported books. The education sector contributed 53.54% to total book sales, the trade sector 28.91% and the academic sector 17.55%. (See pages 19 and 20.) The sales ratios of local books versus imported books according to sub-sector and publishers’ category has also been analyzed. (See pages 21 to 25.)

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

Production profile

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

Author profile

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

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

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

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

Ownership and employment profiles

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

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

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

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

DATA COLLECTION PROCESS

The PASA Office supplied the researchers with its current list of CEOs/ MDs of publishers registered as PASA members. Based on this information a broad survey address list of 160 entities was compiled. This broad list included associate members, entities that are divisions/imprints of holding companies and entities whose core business is the rendering of services such as copy-editing. Based on information about the business activities of members, gleaned from The PASA Directory 2007, the broad PASA list was trimmed to 90 in order to target a representative sample.
The **final core list** consisted of **99 targeted entities**. This list included **90 PASA members** whose core business included one or more of the following activities: local publishing of books and non-book products; distribution of local and imported books (not published by the company); distribution of non-book products (not published by company); and other publishing related activities (e.g. warehousing, rights sales, consultancy). In addition, **9 significant non-PASA publishers** were invited to participate.

**Core list of targeted publishers, distributors and independent market agencies**

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

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PASA ANNUAL INDUSTRY SURVEY REPORT 2006
Notes

- In 2006 the Via Afrika Limited group reported on a subsidiary level, with Nasou/Via Afrika, NB Publishers, Jonathan Ball Publishers, Book Promotions, Van Schaik Publishers and Lux Verbi submitting separate returns, whereas in the past a consolidated holding return was submitted.

- A number of leading booksellers in the trade and academic sub-sectors were asked to rank their suppliers in terms of purchase value. From these rankings the prominent non-PASA publishers could be identified, and most of them could, with a certain degree of accuracy, be allocated to the PASA membership bands based on annual income. Nine large and medium sized non-PASA publishers were identified, approached individually and invited to participate in the survey; 4 responded positively.

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

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

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

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

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

The 2006 Questionnaire and a covering letter from the PASA Executive Committee, contextualising the expanded PASA Annual Industry Survey, were sent to entities on the core list on 20 March 2007. It was clearly stipulated that the completed Questionnaire had to be returned to Dr Francis Galloway via a dedicated e-mail address or by registered post before or on the cut-off date of 16 April 2007.
Various steps had been taken to enlist the co-operation of all relevant role-players. By 16 April only 2 completed Questionnaires were received. From the end of April specific CEOs / MDs were personally targeted at regular intervals in order to speed up the response rate. By 25 May 2007 a total of 19 completed Questionnaires had been received. No further responses were received by 25 June, when the larger publishers were once again contacted by phone and by e-mail and a new deadline of 31 July 2007 set. The Executive Director of PASA, Dudley Schroeder, also contacted key role-players to enlist their participation. By 31 July 2007 all the larger publishers targeted had completed and returned the Questionnaire and feedback was regarded as representative of the publishers in the higher turnover bands of PASA. The research team started preparing the report in the first week of August to be presented to the PASA Exco during the Sector Council Meetings and AGM scheduled for 26-28 August 2007.

Feedback (completed questionnaires and other communication) was received from 39 entities, including 3 that declined to participate. The entities that declined to participate, for a variety of reasons, were: IDASA, Phambili Agencies and Elf Publishing. 36 (including 4 of the invited non-PASA publishers) of the 39 entities completed questionnaires and all of these were included in the analysis. The receipt of each completed questionnaire was individually acknowledged via e-mail or telephone and kept on record.

For the Snapshot Survey 2002 32 completed questionnaires were analysed, representing 50% of the core list of 64 entities and 97% of the estimated Total Net Turnover of all PASA-affiliated entities involved in local book publishing and sales of imported titles. For the Snapshot Survey 2003, 25 out of the 54 core list entities completed questionnaires, representing 46% of the sample and 97.82% of the estimated Total Net Turnover of the targeted entities. Since the Annual Industry Survey 2004 the net was cast wider when the core list was compiled in order to include more entities that are involved in other types of business activities, e.g. the publishing and distribution of non-book products. The 26 questionnaires out of a core list of 80 represented 32.5% of the sample and 94.43% of the estimated Total Net Turnover. For the Annual Industry Survey 2005, 32 out of the 85 core list entities completed questionnaires, representing 37.65% of the sample and 95.04% of the estimated Total Net Turnover. For the Annual Industry Survey 2006, 36 out of the considerably expanded core list of 99 entities completed questionnaires, representing 36.36% of the targeted sample and 92.95% of the estimated Total Net Turnover.
List of entities that participated in the 2005 and 2006 industry surveys

<table>
<thead>
<tr>
<th>Company</th>
<th>2005</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allcopy</td>
<td>✓</td>
<td>✗</td>
</tr>
<tr>
<td>Awareness Publishing</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>Bateleur Books (Pty) Ltd</td>
<td>✓</td>
<td>✗</td>
</tr>
<tr>
<td>Bible Society of South Africa</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>Book Promotions</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Briza Publications</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>Cambridge University Press: African Branch</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Fernwood Press</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>HSRC Press</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>John Wiley &amp; Sons Ltd</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Jonathan Ball Publishers</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Juta &amp; Company Limited</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>LAPA Publishers (Pty) Ltd</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>Lectio Publishers (Pty) Ltd</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Lets Look</td>
<td>✓</td>
<td>✗</td>
</tr>
<tr>
<td>LexisNexis Butterworth SA (Pty) Ltd</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>Lotsha</td>
<td>✓</td>
<td>✗</td>
</tr>
<tr>
<td>Lux Verbi Publishers</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Macmillan South Africa (Pty) Ltd</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Margie Ogilvy Promotions</td>
<td>✓</td>
<td>✗</td>
</tr>
<tr>
<td>Maskew Miller Longman (Pty) Ltd</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Nasou/Via Afrika Publishers</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>NB Publishers</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>New Africa Books (Pty) Ltd</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>New Holland Publishing (SA) (Pty) Ltd</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>New Readers Publishers</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Nutrend Productions</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Oxford University Press Southern Africa</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Palm Publishers</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Pan Macmillan SA</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Penguin Publishers SA (Pty) Ltd</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>PSD Promotions (Pty) Ltd</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>Random House (Pty) Ltd</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Reed Elsevier SA (Heinemann)</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Scholastic Inc</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>Shuter and Shooter Publishers (Pty) Ltd</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Solo Collective</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Troupant Publishers (Pty) Ltd</td>
<td>✓</td>
<td>✗</td>
</tr>
<tr>
<td>Van Schaik Publishers</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Vivlia Publishers &amp; Booksellers (Pty) Ltd</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Wild Dog Press</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Wits University Press</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Total Questionnaires Analyzed</strong></td>
<td>32</td>
<td>36</td>
</tr>
</tbody>
</table>
The following table provides a detailed **producer profile** of the 36 entities that participated in the *Annual Industry Survey 2006*, with reference to their local and international imprints/agencies.

**Producer profile of entities that participated in the 2006 survey**

<table>
<thead>
<tr>
<th>COMPUANIES</th>
<th>LOCAL IMPRINTS/AGENCIES</th>
<th>INTERNATIONAL IMPRINTS/AGENCIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awareness Publications</td>
<td>Awareness Publications</td>
<td>None</td>
</tr>
<tr>
<td>Bible Society of South Africa</td>
<td>Bible Society of South Africa</td>
<td>None</td>
</tr>
<tr>
<td>Cambridge University Press: African Branch</td>
<td>Roedurico Trust</td>
<td>Keys to Learning</td>
</tr>
<tr>
<td>Fernwood Press (Pty) Ltd</td>
<td>Fernwood Press</td>
<td>None</td>
</tr>
<tr>
<td>HSRC Press</td>
<td>HSRC Press</td>
<td>None</td>
</tr>
<tr>
<td>Juta &amp; Company Limited</td>
<td>Ace, Juta, Juta Law, Juta Trade, Juta Academic, Juta Learning, Juta Gariep, Double Storey, UCT Press</td>
<td>None</td>
</tr>
<tr>
<td>LAPA Publishers (Pty) Ltd</td>
<td>LAPA</td>
<td>None</td>
</tr>
<tr>
<td>Lectio Publishers (Pty) Ltd</td>
<td>Lectio Publishers</td>
<td>None</td>
</tr>
<tr>
<td>LexisNexis Butterworths (Pty) Ltd</td>
<td>LexisNexis, Butterworths , Lex Patria</td>
<td>Lexis Nexis, Butterworths Tolley</td>
</tr>
<tr>
<td>COMPANIES</td>
<td>LOCAL IMPRINTS/AGENCIES</td>
<td>INTERNATIONAL IMPRINTS/AGENCIES</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>----------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>NB Publishers</td>
<td>Human &amp; Rousseau, Tafelberg, Jasmyn, Hartklop, Satyn, Mirre, Melodie, Kwea, Pharos, Best Books</td>
<td>None</td>
</tr>
<tr>
<td>New Africa Books (Pty) Ltd</td>
<td>New Africa Education, David Philip, Spearhead, Songololo</td>
<td>None</td>
</tr>
<tr>
<td>Oxford University Press</td>
<td>OUP SA</td>
<td>OUP worldwide, Agencies: World Bank</td>
</tr>
<tr>
<td>Palm Publishers</td>
<td>Palm Publishers</td>
<td>None</td>
</tr>
<tr>
<td>COMPANIES</td>
<td>LOCAL IMPRINTS/AGENCIES</td>
<td>INTERNATIONAL IMPRINTS/AGENCIES</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>----------------------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Scholastic Inc</td>
<td>None</td>
<td>Scholastic</td>
</tr>
<tr>
<td>Shuter &amp; Shooter Publishers (Pty) Ltd</td>
<td>Shuter &amp; Shooter</td>
<td>None</td>
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<tr>
<td>Solo Collective</td>
<td>Solo Collective</td>
<td>None</td>
</tr>
<tr>
<td>Van Schaik Publishers</td>
<td>JL van Schaik, Academica, Van Schaik</td>
<td>None</td>
</tr>
<tr>
<td>Vivlia Publishers &amp; Booksellers (Pty) Ltd</td>
<td>Vivlia</td>
<td>System Publishing</td>
</tr>
<tr>
<td>Wits University Press</td>
<td>Wits University Press, African Treasury</td>
<td>None</td>
</tr>
</tbody>
</table>
DATA CAPTURING

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

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

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

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

- **16 questionnaires** were completed by entities in the LARGE PUBLISHERS’ category on the core list of 99. Since these 16 entities comprised all 16 entities in the K & L bands, the analysis for this category is **100% representative**.
- **13 questionnaires** were completed by entities in the MEDIUM PUBLISHERS’ category on the core list of 99. Since these 13 entities comprise 13 out of 18 entities in the F, G, H, I and J bands, the analysis for this category is **72.22% representative**. Accumulative maximum potential Total Net Turnover for the 5 outstanding entities in this category was estimated at **R129,900,000**. This estimation was based on: (i) the maximum potential turnover of non-participating PASA members according to their position in the PASA membership band structure; and (ii) estimated rankings of the non-participating non-PASA entities within the broad parameters of the PASA membership band structure (see page 5). (This procedure was consistently applied since the 2002 survey.)
7 questionnaires were completed by entities in the SMALL PUBLISHERS’ category on the core list of 99. Since these 7 entities comprised 7 out of 65 listed entities in the A, B, C, D and E bands, the analysis for this category was only 10.77% representative of the identified smaller publishers. Accumulative maximum potential Total Net Turnover for the 58 outstanding entities in this category was estimated at R97,456,000.

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

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

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

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

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

**Total Net Turnover**

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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>R2 717 106 516</td>
<td>R273 707 011</td>
<td>R9 533 054</td>
<td>R3 000 346 581</td>
<td>R227 356 000</td>
<td>R3 227 702 581</td>
</tr>
</tbody>
</table>

**Notes**

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

### Total Net Turnover: Business Activities

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

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

### Total Net Turnover According to Business Activities and Publishers’ Category

#### Large Publishers

- **LOCAL PRODUCT**
  - R 2,008,809,552
  - 73.93%
- **IMPORTED PRODUCT**
  - R 584,975,001
  - 21.53%
- **OTHER ACTIVITIES**
  - R 123,321,963
  - 4.54%

#### Medium Publishers

- **LOCAL PRODUCT**
  - R 165,561,498
  - 60.49%
- **IMPORTED PRODUCT**
  - R 106,167,017
  - 38.79%
- **OTHER ACTIVITIES**
  - R 1,978,496
  - 0.72%
Total Net Turnover According to Business Activities
Small Publishers
[= R9,533,054]

<table>
<thead>
<tr>
<th>Product Type</th>
<th>Net Turnover</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Product</td>
<td>R 9,059,492</td>
<td>95.03%</td>
</tr>
<tr>
<td>Imported Product</td>
<td>R 462,071</td>
<td>4.85%</td>
</tr>
<tr>
<td>Other Activities</td>
<td>R 11,491</td>
<td>0.12%</td>
</tr>
</tbody>
</table>

Notes
- These figures represented feedback from 16/16 large publishers, 13/18 medium publishers, and 7/65 small publishers.
- The most dominant business activity of the large publishers’ category was local product (73.93%).
- The business activity of the medium publishers’ category reflected a dominance of local product (60.49%) with a substantial portion of imported product (38.79%).
- The small publishers’ category focused almost exclusively on local product (95.03%). It is, however, important to remember that this publishers’ category was under-represented in the survey.
The Net Turnover (excluding VAT and discount) of all participating publishers for sales of **local and imported product** into the South African market for the period 1 January to 31 December 2006, according to sub-sector.

<table>
<thead>
<tr>
<th>Sector</th>
<th>Total Net Turnover of Sales of Local &amp; Imported Books</th>
<th>Net Turnover - Sales of Local Books (Rand Value &amp; Percentage)</th>
<th>Net Turnover - Sales of Imported Books (Rand Value &amp; Percentage)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trade sector</td>
<td>R816,670,033 28.91%</td>
<td>R360,847,546 44.19% Local</td>
<td>R455,822,487 55.81% Imported</td>
</tr>
<tr>
<td>Education sector</td>
<td>R1,512,585,770 53.54%</td>
<td>R1,394,777,901 92.21% Local</td>
<td>R117,807,869 7.79% Imported</td>
</tr>
<tr>
<td>Academic sector (incl. Journals)</td>
<td>R495,793,519 17.55%</td>
<td>R378,025,095 76.25% local</td>
<td>R117,768,424 23.75% Imported</td>
</tr>
<tr>
<td><strong>Sub-Total</strong></td>
<td><strong>R2,133,650,542</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100%</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

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

- The turnover of local versus imported academic product (including textbooks, professional books and journals) was not representative of this sub-sector, because a number of important role-players in this sector, especially local market agents for overseas publishers, did not participate in the survey. This is an issue that should be addressed in future surveys.

- Because of improved reporting, a more accurate distinction between academic textbooks and academic professional books and scholarly books could be made for the first time this year. Consequently no direct comparison with figures from the preceding years can be made. This year’s sample of participating academic publishers differed significantly from preceding years.

- See pie charts below for a breakdown of sales of local books (and journals) versus sales of imported books (and journals) according to the three categories of publishers.

### Total Net Turnover - Sales of Local & Imported Books (& Journals) According to Sub-sector

All Participating Publishers [= R2,825,049,322]

<table>
<thead>
<tr>
<th>Sub-sector</th>
<th>Net Turnover</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ACADEMIC TEXTBOOKS</strong></td>
<td>R 257,599,054</td>
<td>9.12%</td>
</tr>
<tr>
<td><strong>ACADEMIC JOURNALS</strong></td>
<td>R 15,943,196</td>
<td>0.56%</td>
</tr>
<tr>
<td><strong>SCHOLARLY BOOKS</strong></td>
<td>R 1,158,913</td>
<td>0.04%</td>
</tr>
<tr>
<td><strong>PROFESSIONAL</strong></td>
<td>R 221,092,356</td>
<td>7.83%</td>
</tr>
<tr>
<td><strong>TRADE FICTION</strong></td>
<td>R 317,145,859</td>
<td>11.23%</td>
</tr>
<tr>
<td><strong>TRADE NON-FICTION</strong></td>
<td>R 499,524,174</td>
<td>17.68%</td>
</tr>
<tr>
<td><strong>EDUCATIONAL ABET</strong></td>
<td>R 4,235,852</td>
<td>0.15%</td>
</tr>
<tr>
<td><strong>EDUCATIONAL FET COLLEGES</strong></td>
<td>R 5,666,176</td>
<td>0.20%</td>
</tr>
<tr>
<td><strong>EDUCATIONAL: SCHOOLS</strong></td>
<td>R 1,502,683,742</td>
<td>53.19%</td>
</tr>
</tbody>
</table>

Notes

- According to these ratios, the South African book publishing industry as a whole was not as overwhelmingly dominated by the educational sub-sector as before.

- The next two pie charts distinguish between sales of local versus imported books (and journals) according to sub-sector.
Total Net Turnover - Sales of Local Books (& Journals)  
According to Sub-sector  
All Participating Publishers [= R2,133,650,542]

- ACADEMIC TEXTBOOKS: 174,645,630 (8.19%)
- PROFESSIONAL: 197,298,356 (9.25%)
- ACADEMIC JOURNALS: 4,922,196 (0.23%)
- SCHOLARLY BOOKS: 1,158,913 (0.05%)
- TRADE FICTION: 98,076,965 (4.60%)
- TRADE NON-FICTION: 262,770,581 (12.32%)

- EDUCATIONAL:
  - SCHOOLS: 1,384,935,576 (64.91%)
  - PROFESSIONAL: 197,298,356 (9.25%)
  - ACADEMIC TEXTBOOKS: 174,645,630 (8.19%)
  - ACADEMIC JOURNALS: 4,922,196 (0.23%)
  - SCHOLARLY BOOKS: 1,158,913 (0.05%)
  - TRADE FICTION: 98,076,965 (4.60%)
  - TRADE NON-FICTION: 262,770,581 (12.32%)

Total Net Turnover - Sales of Imported Books (& Journals)  
According to Sub-sector  
All Participating Publishers [= R691,398,781]

- ACADEMIC TEXTBOOKS: 82,953,424 (12.00%)
- PROFESSIONAL: 23,794,000 (3.44%)
- ACADEMIC JOURNALS: 11,021,000 (1.59%)
- TRADE FICTION: 219,068,894 (31.68%)
- TRADE NON-FICTION: 236,753,593 (34.24%)

- EDUCATIONAL:
  - SCHOOLS: 117,748,166 (17.03%)
  - PROFESSIONAL: 23,794,000 (3.44%)
  - ACADEMIC TEXTBOOKS: 82,953,424 (12.00%)
  - ACADEMIC JOURNALS: 11,021,000 (1.59%)
  - TRADE FICTION: 219,068,894 (31.68%)
  - TRADE NON-FICTION: 236,753,593 (34.24%)

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PASA ANNUAL INDUSTRY SURVEY REPORT 2006

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Notes

- The educational sub-sector was dominated by sales of locally published books.
- The value of local trade non-fiction was slightly higher than that of imported non-fiction.
- See note on the academic sub-sector on page 20.
- The ratio locally produced versus imported books according to sub-sector can be summarized as follows:
  - R 98,076,965 (30.92%) of all trade fiction sales were recorded by locally produced books and R 219,068,894 (69.08%) by imported books.
  - R 262,770,581 (52.60%) of all trade non-fiction sales were recorded by locally produced books and R 236,753,593 (47.40%) by imported books.
  - R 174,645,630 (67.80%) of all academic textbook sales were recorded by locally produced books and R 82,953,424 (32.20%) by imported books.
  - R 197,298,356 (89.24%) of all professional book sales were recorded by locally produced books and R 23,794,000 (10.76%) by imported books.
  - R 1,384,935,576 (92.16 %) of all educational school book sales were recorded by locally produced books and R 117,748,166 (7.84%) by imported books.
  - R 5,606,473 (98.95%) of all educational FET college book sales were recorded by locally produced books and R 59,703 (1.05%) by imported books.
  - R 4,922,196 (30.87%) of all academic journal sales were recorded by locally produced journals and R 11,021,000 (69.13%) by imported journals.
- The next five pie charts represent local versus imported books (and journals) according to sub-sector and publishers’ category.
Total Net Turnover - Sales of Local Books (& Journals)
According to Sub-sector
Large publishers [= R1,968,515,205]

- ACADEMIC TEXTBOOKS
  - R 153,420,946
  - 7.79%
- PROFESSIONAL
  - R 196,956,626
  - 10.01%
- ACADEMIC JOURNALS
  - R 4,922,196
  - 0.25%
- TRADE FICTION
  - R 78,692,067
  - 4.00%
- TRADE NON-FICTION
  - R 161,409,289
  - 8.20%

EDUCATIONAL:
- SCHOOLS
  - R 1,365,112,335
  - 69.35%
- ACADEMIC TEXTBOOKS
  - R 153,420,946
  - 7.79%
- TRADE NON-FICTION
  - R 189,806,360
  - 32.44%
- TRADE FICTION
  - R 197,040,524
  - 33.68%
- ACADEMIC JOURNALS
  - R 4,922,196
  - 0.25%

PROFESSIONAL
- R 196,956,626
- 10.01%

EDUCATIONAL ABET
- R 4,131,856
- 0.21%

EDUCATIONAL FET COLLEGES
- R 3,869,890
- 0.20%

TRANSPORT

Net Turnover - Sales of Imported Books
According to Sub-sector
Large Publishers [= R585,058,000]

- ACADEMIC TEXTBOOKS
  - R 69,403,398
  - 11.86%
- PROFESSIONAL
  - R 18,000,000
  - 3.08%
- TRADE FICTION
  - R 197,040,524
  - 33.68%
- TRADE NON-FICTION
  - R 189,806,360
  - 32.44%

EDUCATIONAL FET COLLEGES
- R 59,703
- 0.01%

EDUCATIONAL:
- SCHOOLS
  - R 110,748,015
  - 18.93%
Total Net Turnover - Sales of Local Books
According to Sub-sector
Medium publishers [= R156,074,836]

<table>
<thead>
<tr>
<th>Sub-sector</th>
<th>Net Turnover</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Educational: Schools</td>
<td>R 18,315,177</td>
<td>11.73%</td>
</tr>
<tr>
<td>Trade Non-Fiction</td>
<td>R 95,547,935</td>
<td>61.22%</td>
</tr>
<tr>
<td>Professional</td>
<td>R 341,530</td>
<td>0.22%</td>
</tr>
<tr>
<td>Trade Fiction</td>
<td>R 19,382,476</td>
<td>12.42%</td>
</tr>
<tr>
<td>Academic Textbooks</td>
<td>R 20,751,135</td>
<td>13.30%</td>
</tr>
<tr>
<td>Educational FET Colleges</td>
<td>R 1,736,583</td>
<td>1.11%</td>
</tr>
<tr>
<td>Academic Textbooks</td>
<td>R 20,751,135</td>
<td>13.30%</td>
</tr>
</tbody>
</table>

Total Net Turnover - Sales of Imported Books (& Journals)
According to Sub-sector
Medium publishers [= R105,878,710]

<table>
<thead>
<tr>
<th>Sub-sector</th>
<th>Net Turnover</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Educational: Schools</td>
<td>R 7,000,151</td>
<td>6.61%</td>
</tr>
<tr>
<td>Trade Non-Fiction</td>
<td>R 46,485,162</td>
<td>43.90%</td>
</tr>
<tr>
<td>Professional</td>
<td>R 11,021,000</td>
<td>10.41%</td>
</tr>
<tr>
<td>Trade Fiction</td>
<td>R 22,028,370</td>
<td>20.81%</td>
</tr>
<tr>
<td>Academic Journals</td>
<td>R 11,021,000</td>
<td>10.41%</td>
</tr>
<tr>
<td>Academic Textbooks</td>
<td>R 13,550,026</td>
<td>12.80%</td>
</tr>
<tr>
<td>Educational: Schools</td>
<td>R 7,000,151</td>
<td>6.61%</td>
</tr>
<tr>
<td>Educational FET Colleges</td>
<td>R 1,736,583</td>
<td>1.11%</td>
</tr>
<tr>
<td>Academic Textbooks</td>
<td>R 20,751,135</td>
<td>13.30%</td>
</tr>
</tbody>
</table>
Total Net Turnover - Sales of Local Books
According to Sub-sector
Small publishers [= R9,060,501]

- ACADEMIC TEXTBOOKS
  - R 473,549
  - 5.23%

- SCHOLARLY BOOKS
  - R 1,158,913
  - 12.79%

- EDUCATIONAL ABET
  - R 103,996
  - 1.15%

- EDUCATIONAL: SCHOOLS
  - R 1,508,064
  - 16.64%

- TRADE FICTION
  - R 2,422
  - 0.03%

- TRADE NON-FICTION
  - R 5,813,357
  - 64.16%

Notes
- The turnover of the large publishers’ category was mainly generated by sales of local educational books and imported trade books.
- The five new participants in the medium publishers’ category all focused mainly on trade books. This impacted on the sub-sector profile of the medium publishers’ turnover to such an extent that year-on-year comparisons are not reliable.
- Because of the fluctuating participation in the small publishers’ category, no valid trends according to sub-sector turnover could be made.
- The sales of ABET products are under-represented because of the non-participation of the relevant role-players.
- Because of pending curriculum changes the sales of FET products were very low.
- The publishers involved in scholarly books formed part of the small publishers’ category.
The Educational Net Turnover (locally published and imported books) according to province for the period 1 January to 31 December 2006.

### Total Net Turnover: Sales of Educational Books According to Province

\[
\text{Total Net Turnover: Sales of Educational Books According to Province} \\
=[ \text{R}\,1,564,780,377] \\
\]

- **KWAZULU-NATAL**
  - R 340,528,634
  - 21.76%
- **LIMPOPO**
  - R 270,002,244
  - 17.25%
- **EASTERN CAPE**
  - R 221,956,473
  - 14.18%
- **MPUMALANGA**
  - R 206,511,786
  - 13.20%
- **WESTERN CAPE**
  - R 202,071,686
  - 12.91%
- **GAUTENG**
  - R 146,416,633
  - 9.36%
- **NORTHERN CAPE**
  - R 14,897,434
  - 0.95%
- **FREE STATE**
  - R 35,301,487
  - 2.26%
- **NORTH WEST**
  - R 127,094,000
  - 8.12%

### Notes

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

**Net Turnover of Local Books per Language**

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

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

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

<table>
<thead>
<tr>
<th>Language</th>
<th>NDEBELE</th>
<th>XITSONGA</th>
<th>TSIVENDA</th>
<th>SISWATI</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRADE FICTION</td>
<td>R 20,586</td>
<td>R 19,375</td>
<td>R 18,386</td>
<td>R 16,912</td>
</tr>
<tr>
<td>TRADE NON-FICTION</td>
<td>R 11,471</td>
<td>R 382,808</td>
<td>R 160,496</td>
<td>R 299,739</td>
</tr>
<tr>
<td>EDUCATIONAL: SCHOOLS</td>
<td>R 2,548,952</td>
<td>R 4,999,243</td>
<td>R 1,965,220</td>
<td>R 7,548,528</td>
</tr>
<tr>
<td>EDUCATIONAL FET COLLEGES</td>
<td>R 0</td>
<td>R 0</td>
<td>R 0</td>
<td>R 0</td>
</tr>
<tr>
<td>EDUCATIONAL ABET</td>
<td>R 7</td>
<td>R 14</td>
<td>R 218</td>
<td>R 21</td>
</tr>
<tr>
<td>ACADEMIC TEXTBOOKS</td>
<td>R 0</td>
<td>R 0</td>
<td>R 0</td>
<td>R 0</td>
</tr>
<tr>
<td>PROFESSIONAL</td>
<td>R 0</td>
<td>R 0</td>
<td>R 0</td>
<td>R 0</td>
</tr>
<tr>
<td>SCHOLARLY BOOKS</td>
<td>R 0</td>
<td>R 0</td>
<td>R 0</td>
<td>R 0</td>
</tr>
<tr>
<td>TOTAL</td>
<td>R 2,581,016</td>
<td>R 5,401,440</td>
<td>R 2,144,320</td>
<td>R 7,865,200</td>
</tr>
</tbody>
</table>
Net Turnover of All Local Book Sales per Language Group

- **AFRIKAANS**
  - R 345,979,508
  - 18.63%

- **AFRICAN LANGUAGES**
  - R 175,324,528
  - 9.44%

- **ENGLISH**
  - R 1,335,440,976
  - 71.92%

**Notes**

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

- **AFRIKAANS**
  - R 141,973,683
  - 39.52%

- **ENGLISH**
  - R 200,795,122
  - 55.89%

- **AFRICAN LANGUAGES**
  - R 16,516,272
  - 4.60%

Net Turnover of Local Book Sales per African Language
per Industry Sub-sector - Trade

- **ISIZULU**
  - R 7,164,489
  - 43.38%

- **ISIXHOSA**
  - R 4,368,163
  - 26.45%

- **SEISOTHO**
  - R 1,385,945
  - 8.39%

- **SEPEDI**
  - R 1,173,495
  - 7.11%

- **XITSONGA**
  - R 402,183
  - 2.44%

- **SISWATI**
  - R 316,651
  - 1.92%

- **TSIVENDE**
  - R 178,882
  - 1.08%

- **NDEBELE**
  - R 32,057
  - 0.19%
Net Turnover of Local Book Sales per Language Group per Industry Sub-sector - Educational

- **ENGLISH**
  - R 848,734,941
  - 75.01%

- **AFRIKAANS**
  - R 123,964,264
  - 10.96%

- **AFRICAN LANGUAGES**
  - R 158,725,598
  - 14.03%

Net Turnover of Local Book Sales per African Language per Industry Sub-sector - Educational

- **ISIXHOSA**
  - R 42,018,886
  - 26.47%

- **ISIZULU**
  - R 56,577,289
  - 35.64%

- **SEPEDI**
  - R 17,430,849
  - 10.98%

- **SESTWANA**
  - R 15,277,500
  - 9.63%

- **SESOTHO**
  - R 10,358,871
  - 6.53%

- **SISWATI**
  - R 7,548,549
  - 4.76%

- **XITSONGA**
  - R 4,999,257
  - 3.15%

- **NDEBELE**
  - R 2,548,959
  - 1.61%

- **TSIVENDA**
  - R 1,965,438
  - 1.24%
### Notes

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

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

<table>
<thead>
<tr>
<th>First Editions</th>
<th>Subsequent Editions &amp; Reprints</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>4,374</td>
<td>9,122</td>
<td>13,496</td>
</tr>
</tbody>
</table>

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

**Local Production: Total Number of First Editions vs. Subsequent Editions and Reprints**

\[ = 13,496 \]

- **RE-EDITIONS & REPRINTS**
  - 9,122
  - 67.59%

- **FIRST EDITIONS**
  - 4,374
  - 32.41%

**Local Production: Total Number of First Editions According to Sub-sector**

- **ACADEMIC TEXTBOOKS**
  - 200
  - 4.57%

- **PROFESSIONAL**
  - 283
  - 6.47%

- **SCHOLARLY BOOKS**
  - 41
  - 0.94%

- **EDUCATIONAL ABET**
  - 34
  - 0.78%

- **EDUCATIONAL FET COLLEGES**
  - 48
  - 1.10%

- **EDUCATIONAL: SCHOOLS**
  - 2,625
  - 60.01%

- **TRADE FICTION**
  - 481
  - 11.00%

- **TRADE NON-FICTION**
  - 662
  - 15.13%
Local Production: Total Number of Subsequent Editions and Reprints According to Sub-sector

- **EDUCATIONAL ABET**
  - 118 titles
  - 1.29%

- **ACADEMIC TEXTBOOKS**
  - 675 titles
  - 7.40%

- **PROFESSIONAL**
  - 446 titles
  - 4.89%

- **SCHOLARLY BOOKS**
  - 3 titles
  - 0.03%

- **EDUCATIONAL FET COLLEGES**
  - 5 titles
  - 0.05%

- **TRADE FICTION**
  - 670 titles
  - 7.34%

- **TRADE NON-FICTION**
  - 574 titles
  - 6.29%

- **EDUCATIONAL: SCHOOLS**
  - 6,631 titles
  - 72.69%

Notes

- The expanded sample impacted notably on the reported number of titles in the total production profile, and specifically on the number of titles in the academic sector.

- The annual local book production was dominated by subsequent editions and reprints.

- Local educational titles dominated the production profile of both first editions and subsequent editions/reprints.

- Non-fiction trade titles (first editions) were prominent in comparison with fiction trade titles. There were more subsequent editions and reprints (670 titles) of trade fiction titles than first editions (481 titles).

- More academic books (textbooks, professional books and scholarly books) were re-issued (1124 titles) than newly published (524 titles).
### Total Title Production (incl. New Editions, excl. Subsequent Editions & Reprints) According to Language and Sub-sector

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

**Note**
- Not all publishers were able to provide a breakdown per language. Some multi-language editions were reported under more than one language. The total production figures according to language can therefore not be directly compared with those reported on pages 32 and 33.
Title Production per Language Group per Industry Sub-sector - Trade

AFRIKAANS
511
44.59%

ENGLISH
561
48.95%

AFRICAN LANGUAGES
74
6.46%

Title Production per African Language per Industry Sub-sector - Trade

ISIXHOSA
12
16.22%

ISIZULU
21
28.38%

SETSWANA
8
10.81%

SEPEDI
6
8.11%

SESOTHO
6
8.11%

SISWATI
6
8.11%

NDEBELE
5
6.76%

XITSONGA
5
6.76%

TSIVENDA
5
6.76%
Title Production per Language Group
per Industry Sub-sector - Educational

- English: 1,224 (44.70%)
- Afrikaans: 642 (23.45%)
- African Languages: 872 (31.85%)

Title Production per African Language
per Industry Sub-sector - Educational

- Sesotho: 109 (12.50%)
- Setswana: 91 (10.44%)
- Sepedi: 111 (12.73%)
- IsiXhosa: 182 (20.87%)
- Isizulu: 181 (20.76%)
- Xitsonga: 56 (6.42%)
- Tsivenda: 48 (5.50%)
- Ndebele: 50 (5.73%)
- Siswati: 44 (5.05%)
Note

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

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

Total Number of Authors / Other Parties Receiving Royalties

<table>
<thead>
<tr>
<th>Authors Receiving Royalties</th>
<th>Other Parties Receiving Royalties</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>15,608</td>
<td>920</td>
<td>16,528</td>
</tr>
</tbody>
</table>

Author Profile According to Population Group and Sub-sector

Author Profile According to Population Group:
Trade Sector [= 2,282]

- WHITE 1,942 (85.10%)
- BLACK 340 (14.90%)

Author Profile According to Population Group:
Academic Sector [= 3,334]

- WHITE 2,776 (83.26%)
- BLACK 558 (16.74%)
Notes

- The expanded participant pool impacted notably on the total number of authors reported. It must be noted, however, that the same author could have been published by various publishers and that the “author pool” can only be accurately established by means of constructing a nation-wide author database.

- In the educational sector, the largest local publishing sector and the one in which equity has been pursued most actively, a breakdown of the ratio black versus white authors could not be statistically established since one large educational publisher did not provide the required breakdown according to population groups.

- The ratio white versus black authors were unrepresentative of the population profile in the trade sector (14.90% black versus 85.10% white) and the academic sector (16.74% black versus 83.26% white).
### ROYALTY PROFILE

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

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

**Notes**

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

#### According to Publishers’ Category

<table>
<thead>
<tr>
<th></th>
<th>% of Net Turnover</th>
<th>Range</th>
<th>Rand Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Small</strong></td>
<td>8.43%</td>
<td>From 1.50% to 17.15%</td>
<td>R763,734</td>
</tr>
<tr>
<td><strong>Medium</strong></td>
<td>10.96%</td>
<td>From 5.69% to 18.15%</td>
<td>R13,580,666</td>
</tr>
<tr>
<td><strong>Large</strong></td>
<td>14.94%</td>
<td>From 7.00% to 19.50%</td>
<td>R293,315,985</td>
</tr>
<tr>
<td></td>
<td><strong>Average for</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>participating</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>publishers</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>14.67%</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Total for</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>participating</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>publishers</strong></td>
<td></td>
<td><strong>R307,660,385</strong></td>
</tr>
</tbody>
</table>

**Notes**

- The average royalty percentages recorded in this survey differed significantly from those of the past because of the difference in the sample.

- Some participants pay significantly more and others significantly less royalties as a percentage of their Net Turnover than those of previous surveys.

- The variation in the range between the minimum and maximum average royalty percentage paid by specific companies was significant. Therefore the average royalty percentage per publishers’ category and sub-sector is a theoretical average and must be interpreted within the parameters of the range.
FINAL REMARKS

- Notwithstanding the fact that the report does not contain data from all 99 entities that formed the core list of the 2006 survey, feedback from the 13 medium (bands F-J) and 16 large entities (K & L bands) included in the report provides a representative perspective on the industry.

- Based on the reported Total Net Turnover of 36 entities and the estimated maximum Total Net Turnover of the remaining 63 entities the reported turnover profile represents 92.95% of the sample.

- The expansion of the sample base and the inclusion of non-PASA entities of the 2006 survey complicate direct year-on-year comparisons with previous surveys.

- Broad trends (including comparable growth patterns based on the feedback of 25 entities that participated in the 2004, 2005 and 2006 surveys) are tabled in a separate Broad Trends Report.

- The Research Team trusts that all PASA members and other participants will be convinced of the usefulness of the analysis and that the participant pool will expand in the future.

Dr Francis Galloway  
Dr Rudi MR Venter  
Willem Struik

September 2007