

**UNIVERSITY OF PRETORIA**

**SCHOOL OF INFORMATION TECHNOLOGY**

**DEPARTMENT OF INFORMATION SCIENCE  
PUBLISHING STUDIES**

***PASA SNAPSHOT INDUSTRY SURVEY 2003  
REPORT***

**AUGUST 2005**

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## **BACKGROUND**

In recent years the importance of statistical information on the book industry has been noted by various role-players. Apart from the interest expressed by individual PASA and SABA members, statistical information on the industry is also required by government. PASA, SABA, PAMSA and PIFSA are represented by the PICC (Print Industries Cluster Council). A cultural observatory has been set up at the HSRC, whose task it is to collate statistics on all cultural industries (that are grouped in similar Cluster Councils) and to feed information to government. The aim of the Cluster Councils is to make government funding available to business sectors for developing their industries; this funding, however, is dependent on accurate and reliable information about the shape and size of the industry. There are also regular requests from international bodies for statistical information on the local industry for worldwide collation, e.g. International Publishers' Association (IPA) and the Board of the Frankfurt Book Fair (FBF).

Therefore the members of PASA and SABA agreed in 2003 that the Information Science Department of the University of Pretoria would be contracted (as an independent and non-profit research institution) to undertake an exploratory *Snapshot Industry Survey* – the objective being to provide a broad overview of the shape and size of the local book industry for the calendar year 2002. This survey was so successful that when the *Final Report: PASA/SABA Snapshot Industry Survey 2002* was handed over to PASA, SABA and the PICC in August 2004, they indicated that a follow-up survey should be undertaken.

## **DATA COLLECTION PROCESS**

The PASA Office supplied the University of Pretoria with a list of CEOs/ MDs of holding companies registered as PASA members during 2003. Based on this information a survey address list of **106** entities was compiled. (The contact list for the *Snapshot Survey 2002* contained 117 entities, including some whose core business did not include local book publishing and/or who were divisions/imprints of holding companies). The first notification of the *Snapshot Survey 2003* was directed at all 106 entities on this list in order to reach all the potential relevant role-players. It soon became clear that 7 of the entities on this broad list are either no longer members of PASA or imprints of holding companies. The original survey address list was therefore trimmed down to **99** entities.

Based on an analysis of additional information on core business provided by the PASA Office and data reflected in the *PASA Directory 2003*, this survey list of 99 was trimmed down further to include only holding companies that (also) **publish local ISBN-based titles**. Many of the entities

on the survey list (as far as the researchers could establish their core business and current membership status) are primarily involved in other kinds of publishing related activities (e.g. the distribution of local and/or international imprints, the rendering of editorial and production related services, or the development of learning and teaching support material that is not ISBN-based). The 2003 **core list** contains **54** holding companies (larger and smaller publishers registered as PASA members) that are (also) producers of local ISBN-based titles. (The core list of the *Snapshot Survey 2002* contained 64 entities, but this list was still too inclusive – the core business of 12 of these entities did not include local ISBN-based publishing.) By the time the 2003 survey was undertaken, 5 companies on the 2002 list were no longer members of PASA and 1 company became an imprint of another company. The core list for the *Snapshot Survey 2003* contains 46 companies from the 2002 core list [64-12-5-1=46] plus 8 relevant additional (new) PASA members [46+8= 54].

The core list for the *Snapshot Survey 2003* consists of the following 54 companies whose core business includes (even to a minor degree in the case of local agencies of international holding companies and local companies mainly involved in the development of non-ISBN-based learning/teaching support material) the **production of local ISBN-based titles**:

Aardvark Press	New Africa Books
Actua Press	New Dawn Publishers
Anansi	New Generation Publishers
Awareness Publishing	New Holland Publishing SA
Bateleur Books	O.B.E. Publishers
Bell-Roberts Print and Publishing	Oxford University Press SA
Brenthurst Press	Palm Publishers
Briza Publications	Pan Macmillan SA
Cambridge University Press: African Branch	Penguin Books SA
CLS Publishers	Random House SA
Heinemann Group SA	Shuter & Shooter Publishers
Hibbard Publishers	Solo Collective
Idasa	STE Publishers
Ilitha Publishers	Study Opportunities
Jacana	The Reader's Digest SA
Junior Student Publishers	Tin Can Publishing
Juta & Company	Troupant Publishers
Lannice Snyman	Umtapo Publishers & Booksellers
Learning Matters Africa	University of Natal Press
Let's Look	Via Afrika
Litera Publications	Viva Books

Macmillan Boleswa	Vivlia Publishers & Booksellers
Maskew Miller Longman	WJ Flesch & Partners/Flesch Publications
Maths Centre	Wits University Press
Metc	Wordsmiths Publishing
Metz Press	Y Press
Nam Publishers	Zachen Publishers

The Questionnaire used for the *Snapshot Survey 2002* was refined and expanded in consultation with the PASA Exco. Participants had to provide information about the name of the holding company; the holding company's core business (according to certain categories, with the main category being that of ISBN-based local book publishing) and local divisions/imprints and international imprints/agencies. The survey questions focused on the holding company's turnover profile; production profile; author profile; royalty profile; employment profile and ownership profile in South Africa. The CEO/MD of the holding company was requested to include exact (or as accurate as possible approximations of) accumulated and consolidated figures pertaining to all relevant divisions and/or imprints of the company.

The Questionnaire and a covering letter from the PASA Exco that contextualised the *Snapshot Industry Survey 2003*, were sent to the original survey e-mail address list (containing 106 entities) on 13 August 2004. It was clearly stipulated that the completed Questionnaire should be returned to Dr Francis Galloway via e-mail or by registered post by the cut-off date of 20 September 2004.

Since 13 August 2004 various steps had been taken to ensure the co-operation of all relevant role-players – and the deadline for the return of completed questionnaires was repeatedly moved forward to accommodate the role-players. The PASA Office sent various e-mail messages about the project to the CEOs/MDs of companies (including on 2 September, 17 September, 7 October 2004 and 14 January 2005) and personal contact was also established to encourage co-operation. The researchers have been in constant contact with all relevant role-players since the commencement of the project, via e-mail and telephone. By 8 December 2004 only 11 completed questionnaires had been received and 20 by 11 February 2005.

During the PASA meeting of 14 -16 February 2005, Dr Galloway gave feedback on the slow progress with the 2003 survey. During this meeting the need for reliable statistics and other data on the shape and size of the industry was highlighted in several sessions. An urgent appeal was made to PASA members to participate in the *Snapshot Survey 2003*. A committee, consisting of the sector representatives of the Education, Trade and Academic Sectors of PASA, was constituted to assist

the researchers in liaising with members who had not completed the questionnaire. During the following weeks Dave Ryder (Education), Jeremy Borraine (Trade) and Chris Reinders (Academic) contacted specific members in order to encourage them to participate. This drive culminated in a few more completed questionnaires. The last of these was received on 6 April 2005. Only then was feedback considered representative to a degree and the researchers could proceed with the data processing.

Feedback (completed questionnaires and other communication) was received from **37** companies, including **8** that declined to participate / are no longer members of PASA. **29** of these companies [37-8=29] returned completed questionnaires. **25** of these questionnaires were used for analysis. The other **4** role-players (Creative Learning, Lectio Publishers, PSD Promotions and Wild Dog Press) could not be taken into consideration because they did not publish local ISBN-based titles, but were involved in other book-related activities. We thank them for their participation.

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 companies and 97% of the total net turnover of all PASA-affiliated companies involved in local ISBN-based publishing. For the *Snapshot Survey 2003*, **25** out of the 54 core list companies completed questionnaires; 26 did not complete the questionnaire and 3 declined to participate. The 25 completed questionnaires that were analysed represent 46% of the relevant sample of 54 companies and 97.82% of the total net turnover of all PASA affiliated companies involved in local ISBN-based publishing (see page 10).

The following table lists the companies who have participated in the snapshot surveys of 2002 and 2003 and provides a comparative indication of who did and did not participate again in the *Snapshot Survey 2003*.

<b>Company</b>	<b>2002</b>	<b>2003</b>
Aardvark Press	✘	✓
Anansi	✓	✓
Bell-Roberts Print and Publishing	✓	✘
Brenthurst Press	✓	✓
Briza Publications	✓	✓
Cambridge University Press	✓	✓
Creative Learning	✓	✓
Heinemann (Reed Elsevier)	✓	✓
Jacana	✓	✓

John Wiley	✓	✗
Junior Student Publishers	✗	✓
Juta and Company	✓	✓
Lannice Snyman	✓	✗
LAPA Publishers	✓	✗
Lectio Publishers	✗	✓
Let's Look	✗	✓
Macmillan Boleswa	✓	✓
Maskew Miller Longman	✓	✓
Maths Centre for Primary Teachers	✓	✓
METC	✓	✗
New Africa Books	✓	✓
New Holland Publishing SA	✓	✓
New Readers Publishers	✓	✗
Oxford University Press SA	✓	✓
Palm Publishers	✗	✓
Pan Macmillan SA	✓	✓
Penguin Publishers SA	✓	✓
PSD Promotions	✗	✓
Quartet Sales and Marketing	✓	✗
Random House SA	✓	✓
Reading Matters	✓	✗
Shuter and Shooter Publishers	✓	✓
Solo Collective	✓	✓
Troupant Publishers	✓	✓
Via Afrika	✓	✓
Wild Dog Press	✓	✓
Wits University Press	✓	✓
Y Press	✓	✗
Zachen Publishers	✓	✗

The following table lists all the **29** completed questionnaires for the *Snapshot Survey 2003*. It provides a more detailed **profile**, based on information provided in the completed questionnaires, of the **holding companies** with reference to their local and international imprints/publishing lists. Of these 29 companies, the information obtained from **25** was used for analysis. (Four companies were not involved in local ISBN-based book publishing - see page 5.)

<b>HOLDING COMPANY</b>	<b>LOCAL IMPRINTS / AGENCIES</b>	<b>INTERNATIONAL IMPRINTS / AGENCIES</b>
<b>Aardvark Press</b>	None	None
<b>Anansi</b>	None	None
<b>Briza Publications</b>	None	None
<b>Brenthurst Press</b>	None	None
<b>Cambridge University Press</b>	Roedurico3	None
<b>Creative Learning</b>	None	None
<b>Jacana Media</b>	None	None
<b>Junior Student Publishers</b>	None	None

<b>Juta and Company</b>	Ace, Juta, Gariiep, Double Storey, UCT Press, Idem	None
<b>Lectio Publishers</b>	Solidarity Publications	None
<b>Let's Look</b>	None	None
<b>Macmillan Boleswa</b>	Nolwazi Educational Publishers, Macmillan, Ravan Press, Guidelines Educational Publishers, Clever Books	Macmillan Nelson Thornes (New Way Only)
<b>Maskew Miller Longman</b>	Pearson Education, Sached, Kagiso, De Jager-Haum, Prolit, Phumelela, Perskor	AWL, Allyn and Bacon, Annick Press, Cisko Press, Financial Times, Ladybird, Longman, New Riders, Orion, Peachpit Press, Prentice Hall, Que, Ravette, Reuters, SAMS, York Notes, Disney, Barbie
<b>Maths Centre</b>	None	None
<b>New Africa Publishing</b>	New Africa Education, David Philip, Spearhead, Songololo	ZED, One World, James Currey
<b>New Holland Publishing SA</b>	Struik, Struik Christian Books, Map Studio, Zebra, Oshun, New Holland, Globetrotter	Nelson Books, Nelson Bibles, W Publishing, Bethany House, Waterbrook, Kingsway Books, Broadman & Holman, Broadman Lifeway, Lion Publishing, Bantam Doubelday, Christian Focus, Monarch, Whitaker House, Destiny Image, Harrison House, Servant Publications, Warner Faith, CWR
<b>Oxford University Press SA</b>	None	Pease International, World Bank, APP
<b>Palm Publishers</b>	None	None
<b>Pan Macmillan SA</b>	Pan Macmillan, Picador Africa, Giraffe Books	Macmillan, Pan, Picador, Sidgwick & Jackson, Macmillan Children, Campbell, Walker, Frances Lincoln, Palgrave, Priddy Books, Hodder Wayland, Hodder Arnold, Consumer Education, St Martins Press, Farrar Straus & Giroux, Rodale, Wisden

<b>Penguin SA</b>	Viking	PenguinUK & New Zealand & Australia, Hamish Hamilton, Viking, Michael Joseph, Warne, Rough Guides, Puffin, Penguin USA, Atlantic Books, Canongate, Constable and Robinson, Egmont, Faber and Faber, Nelson Thornes, Octopus, Piatkus, Sanctuary, Times Warner Books, Virgin Books
<b>PSD Promotions</b>	None	None
<b>Random House SA</b>	Random House SA	Anchor Books, Andersen Press, Arrow, Ballantine, Bantam, Bantam Press, Black Swan, Bodley Head, Broadway, Cedar, Century, Chatto & Windus, Clakson Potter, Corgi, Del Rey, Doubleday, Ebury Press, Everyman's Library, Fawcett, Gramercy, Harmony, Harvill Press, Heinemann, Hutchinson, Ivy, Jonathan Cape, Knopf, Living Language, Modern Library, Pantheon, Pimlico, Random House, Red Fox, Rider, Schocken, Secker & Warburg, Shambala, Sierra Arts, Tellastory, Three Rivers, Times Books, Vermillion, Villard Books, Vintage, Yellow Jersey Press
<b>Reed Elsevier SA (Heinemann)</b>	Heinemann, Isando Books, Centaur, Lexicon	Ann Arbor, Academic Press, Architectural Press, Aspen, Butterworth-Heinemann, Christopher Helpm, CIMA Publishing, Digital Press, Elsevier, Excerpta Medica, Focal Press, Ginn, Greenwood, Gulf Professional, Guathier-Villars, Heinemann, Inkata Press, JAI Press, Morgan Kaufmann, Michael Wiese, Newnes, North-Holland, Pergamon Press, Poyser, Rigby, Royal Netherlands Academy of Arts and Sciences, Syngress Media, Surrey University Press
<b>Shuter &amp; Shooter</b>	None	None
<b>Solo Collective</b>	None	None
<b>Troupant</b>	Rollerbird Press	None



<b>Via Afrika</b>	<p><b>NB Publishers</b> (Human&amp;Rousseau, Tafelberg, Jasmyn, Hartklop, Satyn, Mirre, Melodie, Kwela, Pharos, Best Books), <b>Nasou Via Afrika</b> (Nasou, Via Afrika, Nasou/Via Afrika, Action, Afro, Collegium, Atlas, Afritech, KZNBooks, Acacia), <b>Van Schaik</b> (JL van Schaik, Academica, Van Schaik, Jacana), <b>Jonathan Ball</b> (Jonathan Ball, Ad Donker, Sunbird, Delta), <b>Leksikons Book Promotions</b> (Ampersand Press, Avian Demography Unit, Carmel Art, Catholic Institute of Education, Editors Inc, Francolin Publishers, George Poulos, Greenhouse, International Motoring Products, Investor Education, Roberts Birds, Joint Education Trust, K53, Mutual &amp; Federal Cricket Annual, National Publishing, Oceans of Africa, Rainbird Publishers, SARFU Rugby Annual, Sederberg Uitgewers Stonewall Books, Stormberg Publishers, Triple T, Winelands, Wits University Press, Woodbay Books and Guides), <b>Lux Verbi</b> (NG Kerk Uitgewers, Lux Verbi.BM, Hugenote Uitgewers, Protea, Bybelkor, Waterkant, Mema Media, Nehemia Bible Institute, Hugenote Bybelinstituut)</p>	<p><b>Jonathan Ball Publishers</b> (Harper Collins, Hodder Headline, Orion, Octopus, Mira, Bloomsbury, Simon &amp; Schuster, Time Warner USA, Watts, Scholastic, John Murray, Texere, AA Publishing UK, Granta, Pavillion, Profile, Sutton, Taschen, Eerdmans, Zondervan)</p>
<b>Wild Dog Press</b>	None	None
<b>Witwatersrand University Press</b>	None	None

## DATA CAPTURING

The data collected from the **25** applicable questionnaires (companies involved in local ISBN-based book production) have been captured in Excel. Several security measures ensure the confidentiality of the information, both in paper and electronic format.

Following the procedure instituted for the *Snapshot Survey 2002*, the **54** companies on the 2003 **core list** were coded according to the turnover band structure (A–L) on which PASA membership fees are based (this information is provided by the PASA office). The 54 companies were then organised into two basic categories: LARGER PUBLISHERS/HOLDING COMPANIES (bands F–L, that include companies with an annual turnover of more than R5m) and SMALLER PUBLISHERS/HOLDING COMPANIES (bands A–E, that include companies with an annual turnover of less than R5m). The **LARGER PUBLISHERS** category on this core list comprised **15** companies and the **SMALLER PUBLISHERS** category comprised **39** companies [15+39=54].

Of the 25 questionnaires used for analysis **15** were completed by holding companies in the LARGER PUBLISHERS category on the core list of 54. Since these 15 companies include **all** the relevant members listed in PASA’s F-L bands, the analysis for this category is 100% representative of the PASA profile for companies involved in local ISBN-based publishing. (The data of 17 larger companies were taken into consideration for the *Snapshot Survey 2002*. One of these companies is no longer a member of PASA and another company’s turnover was generated by non ISBN-based products. Therefore, any true comparison between the data of 2002 and 2003 should be based on the same 15 companies in this category.)

Of the 25 questionnaires used for analysis **10** out of 39 questionnaires were completed by holding companies in the SMALLER PUBLISHERS category on the core list of 54 [54-15=39]. The questionnaire was not completed by 29 other relevant companies falling in the A-E bands. The analysis of the data received from the 10 smaller companies therefore cannot be regarded as representative of the PASA profile, since they only represent 26% of the target group in this category. Accumulative maximum potential turnover based on the PASA turnover bands for outstanding questionnaires is estimated at **R35,921,000.00**, based on the maximum potential turnover of each specific publisher according to its membership category.

The total net turnover as per all 25 questionnaires is **R1,609,350,231.00** (Rx) (see page 12). If the estimated amount for the 29 outstanding questionnaires is added to this, the estimated total net turnover for all 54 companies would be **R1,645,271,231.00** (Ry). The analysis below is based on

the actual figure(s) in the questionnaires and therefore constitutes  $R_x / R_y \times 100 = 97.82\%$  of the total turnover for all 54 companies. Even though the profile is not 100% correct, the profile is based on 97.82% of the total, which gives a clear indication of the industry profile according to PASA membership.

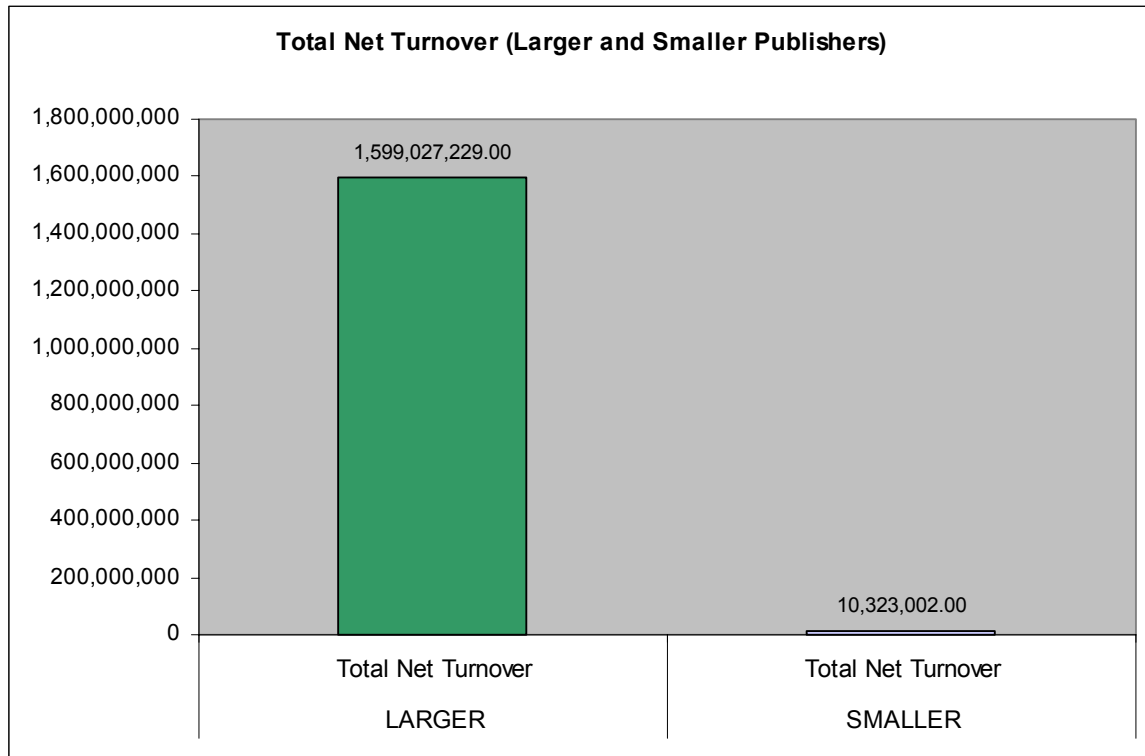
All entities on the original survey list provided by PASA can be accounted for. The list of **106** entities included 4 members that were imprints of holding companies during 2003 and 3 companies that were no longer members of PASA. The trimmed down survey list of **99** members included 45 companies whose core business did not include the production of local ISBN-based titles – their activities centre around the production of various forms of learning and teaching support material (non ISBN-based) and/or services such as marketing, sales, distribution, and editorial services. The remaining **54** companies on the survey list [25+26+3] constitute the core list of holding companies whose core business includes local book publishing. From this core list 25 companies completed the questionnaire, 26 did not complete it and 3 declined to participate [45+54=99].

## **DATA ANALYSIS**

Data from the relevant **25** completed questionnaires was analysed in order to construct six generic profiles of the South African book publishing industry: turnover, production, author, royalty, employment, and ownership. Several security and quality control measures ensure 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 companies.**

### Question 1 A – Total Turnover Profile

*What were the total GROSS turnover (including VAT and discount) and/or the total NET turnover (excluding VAT and discount) for book sales into the South African market (all imprints included) from 1 January 2003 to 31 December 2003?*



#### Notes

- These figures represent feedback from 15/15 larger publishers.
- These figures represent feedback from 10/10 smaller publishers.
- Total gross turnover cannot be provided because only 8/15 larger publishers provided data.
  
- **Combined total net turnover** of the participating larger and smaller publishers:  
**R1,609,350,231.00**
- **Estimated total net turnover** of all 54 publishers (see page 10): **R1,645,271,231.00**

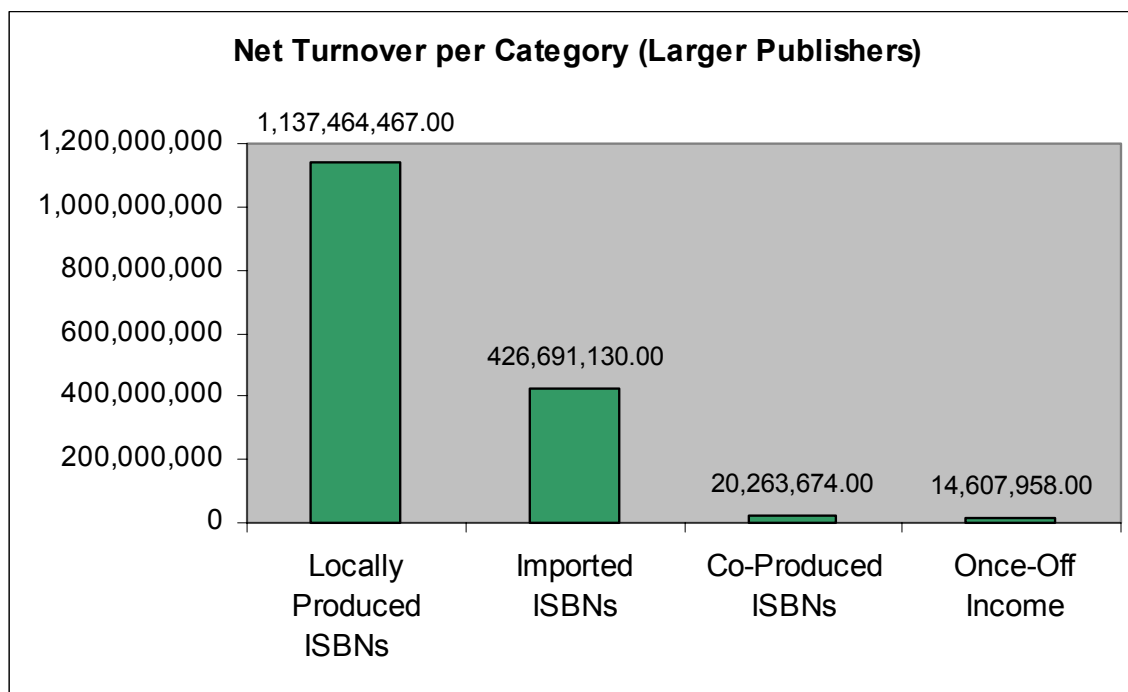
## Comparison with Snapshot 2002

	<b>2002</b>	<b>2003</b>
<b>NUMBER OF QUESTIONNAIRES USED</b>	Core list = 64 Questionnaires used = 32 [17 Large+15 Small]	Core list = 54 Questionnaires used = 25 [15 Large +10 Small]
<b>TURNOVER PROFILE</b>		
<b>Total net turnover of participating publishers</b>	<b>R1,392,874,286.00</b>	<b>R1,609,350,231.00</b>
When the total net turnover of participating publishers in 2003 is compared to the total net turnover of 2002 there has been a growth of 15.54 %.		
<b>Estimated total net turnover of companies on core list</b>	<b>R1,435,090,286.00</b>	<b>R1,645,271,231.00</b>
When the estimated total net turnover of all 54 publishers on the core list in 2003 is compared to the estimated total net turnover of all 64 publishers on the core list of 2002 there has been a growth of 14.65 %.		
<b>Comment</b>		
The actual growth in turnover is higher than the percentages given above, because a more refined core list and a smaller number of questionnaires were used for the 2003 Snapshot. It is, however, not possible to provide a more precise comparison because the sample changed.		

## Question 1 B – Turnover Profile per Broad Category

*What was the distribution of the total NET turnover for the various publishing categories?*

### LARGER PUBLISHERS



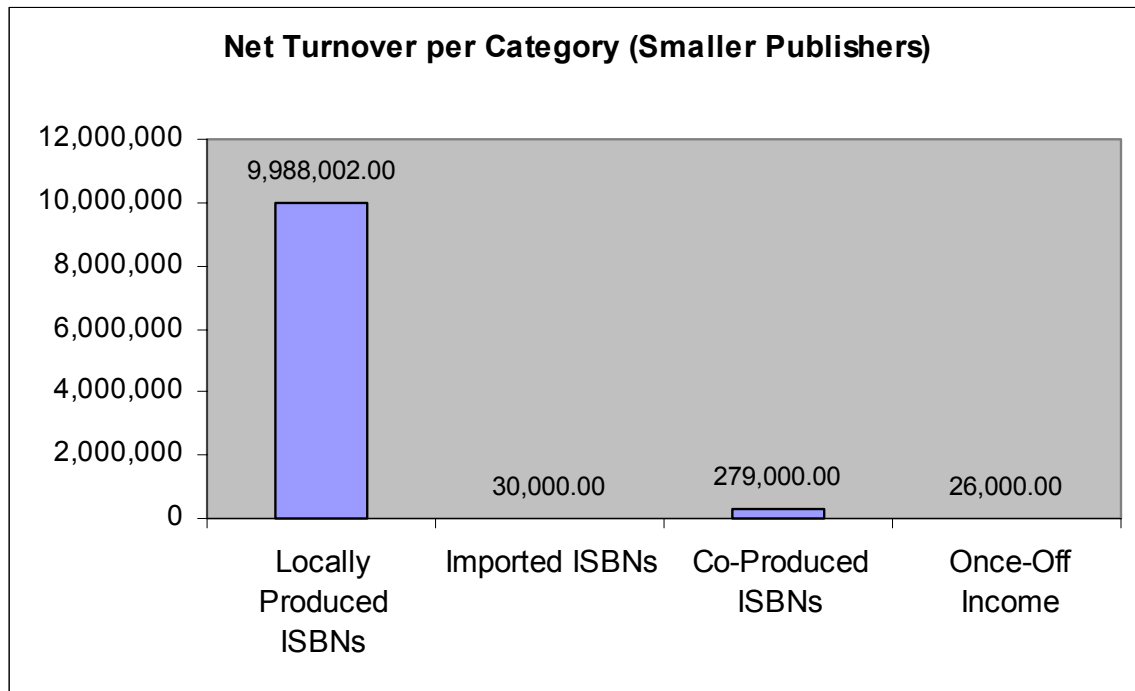
### Notes

- These figures are representative of 15/15 larger publishers.
- It is important to note that the figure for the turnover of imported titles does not include the sales of all imported titles (this figure only reflects the turnover generated by 15 role-players who are also involved in local ISBN publishing).
- Once-off income includes remainder sales. Publishers did not specify what the precise nature of their once-off income was.
- **Total net turnover** for all categories: **R1,599,027,229.00**

**Net turnover** per category of participating larger publishers and **percentages**:

- Locally produced ISBNs: R1,137,464,467.00 (71.1% of total)
- Imported ISBNs: R426,691,130.00 (26.7% of total)
- Co-produced ISBNs: R20,263,674.00 (1.3% of total)
- Once-off income: R14,607,968.00 (0.9% of total)

## SMALLER PUBLISHERS



### Notes

- These figures represent 10/10 smaller publishers.
- **Total net turnover** of smaller publishers: **R10,323,002.00**
  
- **Combined net turnover** of participating larger and smaller publishers: **R1,609,350,231.00**
  
- **Combined net turnover** per category of participating larger and smaller publishers and percentages:
  - Locally produced ISBNs: R1,147,452,469.00 (71.3% of total)
  - Imported ISBNs: R426,721,130.00 (26.5% of total)
  - Co-produced ISBNs: R20,542,674.00 (1.3% of total)
  - Once-off income: R14,633,958.00 (0.9% of total)

## Comparison with Snapshot 2002

	<b>2002</b>		<b>2003</b>	
<b>NUMBER OF QUESTIONNAIRES USED</b>	Core list = 64 Questionnaires used = 32 [17 Large+15 Small]		Core list = 54 Questionnaires used = 25 [15 Large +10 Small]	
<b>TURNOVER PROFILE PER CATEGORY</b>	<b>Amount in Rand</b>	<b>Percentage</b>	<b>Amount in Rand</b>	<b>Percentage</b>
Total per three categories	R1,392,874,286	100%	R1,594,716,273	100%
Locally produced ISBNs	R1,023,540,826	73.48%	R1,147,452,469	71.95%
Imported ISBNs	R366,152,543	26.29%	R426,721,130	26.76%
Co-produced ISBNs	R3,180,917	0.23%	R20,542,674	1.29%
<b>Comment</b>				
The growth in the turnover of co-produced titles is noteworthy.				

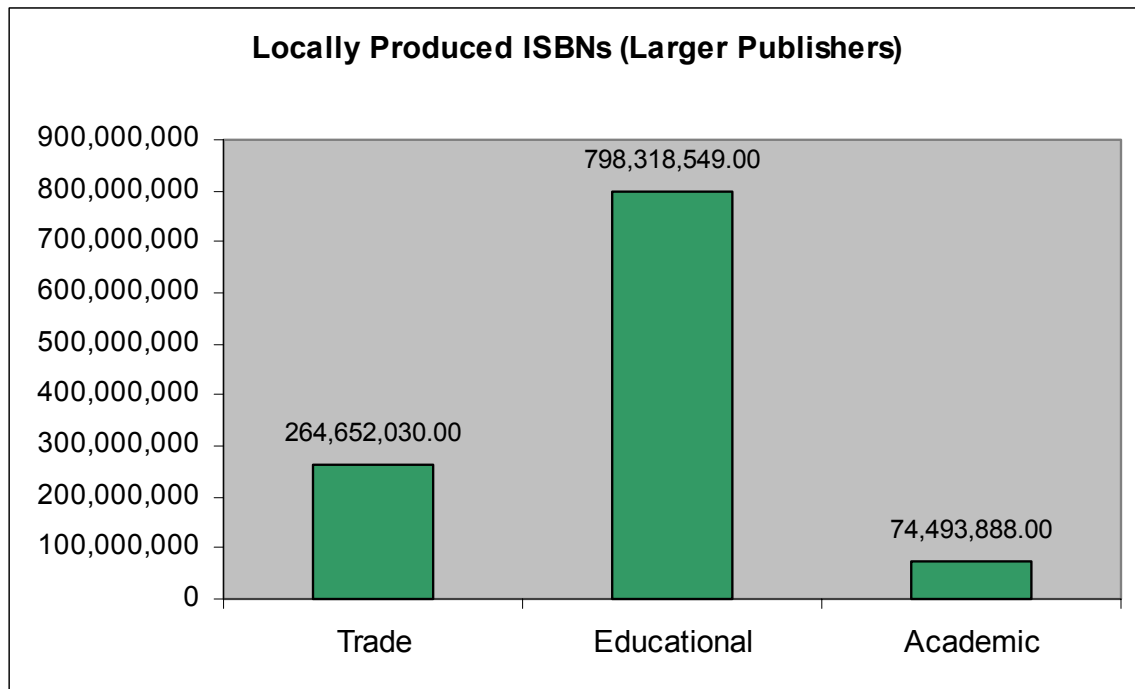


### Question 1 C – Turnover Profile per Sub-Sector

*What was the distribution of the total Net turnover for the various categories according to the three sub-sectors of book publishing?*

#### Locally Produced ISBNs

#### LARGER PUBLISHERS



#### Notes

- These figures are representative of 15/15 larger publishers.
- **Total net turnover** on locally produced titles in three sub-sectors: **R1,137,464,467.00**

#### SMALLER PUBLISHERS

Net Turnover on Trade Books: **R6,290,776.00**

Net Turnover on Educational Books: **R3,026,215.00**

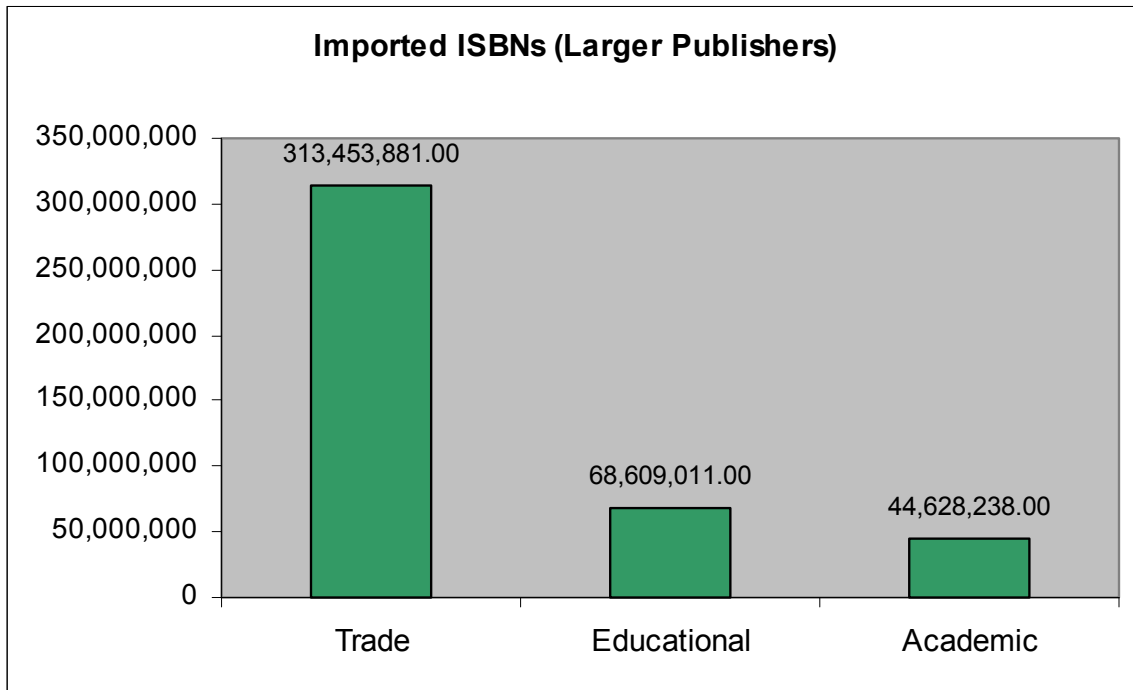
Net Turnover on Academic Books: **R671,011.00**

- These figures are representative of 10/10 smaller publishers.
- Trend: Smaller publishers focus on the trade market.

- **Combined total net turnover** on locally produced ISBNs for participating larger and smaller publishers: **R1,147,452,469.00**
- **Combined total net turnover** on locally produced ISBNs per category for participating larger and smaller publishers and **percentages**:
  - Trade: R270,942,806.00 (23.6% of category total)
  - Educational: R801,344,764.00 (69.8% of category total)
  - Academic: R75,164,899.00 (6.6% of category total)

## Imported ISBNs

### LARGER PUBLISHERS



#### Notes

- These figures represent 15/15 larger publishers.
- **Total net turnover** on imported titles in three sub-sectors: **R426,691,130.00**

### SMALLER PUBLISHERS

Net Turnover on Trade Books: **R 0**

Net Turnover on Educational Books: **R30,000.00**

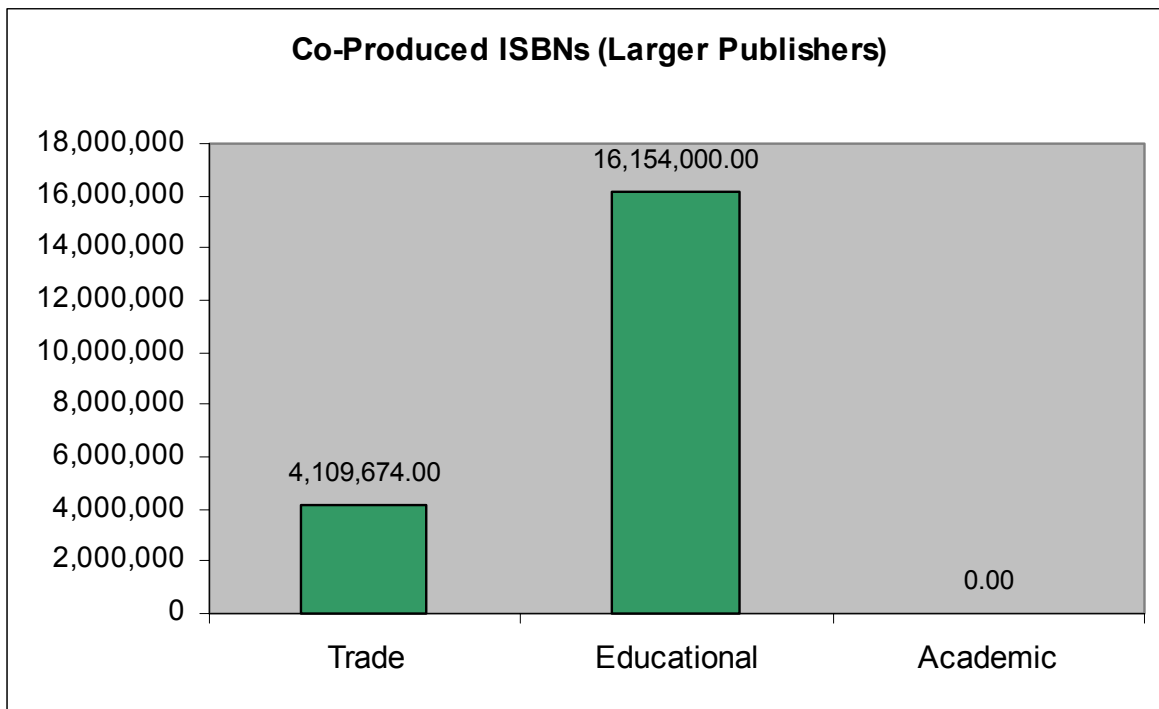
Net Turnover on Academic Books: **R 0**

- These figures represent 10/10 smaller publishers.

- **Combined total net turnover** on imported titles of the participating larger and smaller publishers: **R426,721,130.00**
- **Combined total net turnover** on imported titles per category for participating larger and smaller publishers and **percentages**:
  - Trade: R313,453,881.00 (73.5% of category total)
  - Educational: R68,639,011.00 (16.1% of category total)
  - Academic: R44,628,238.00 (10.4% of category total)
- Trend: Most trade books are imported; educational and academic titles probably depend more on local content.

## Co-produced ISBNs

### LARGER PUBLISHERS



#### Notes

- These figures represent 15/15 larger publishers.

### SMALLER PUBLISHERS

Net Turnover on Trade Books: **R 0**

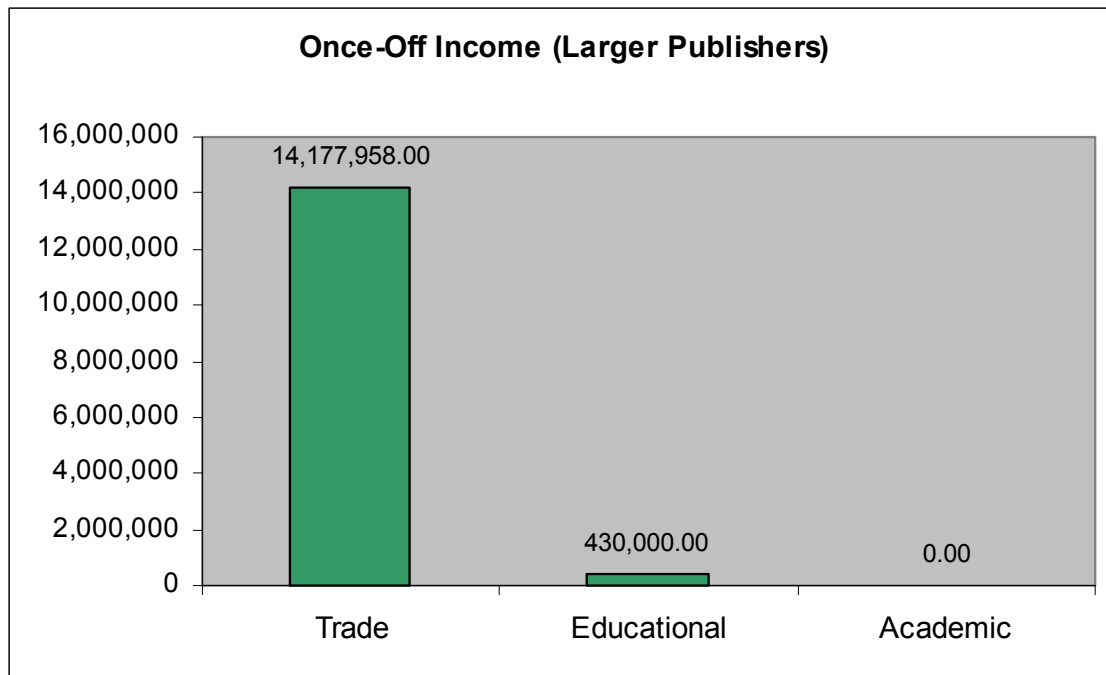
Net Turnover on Educational Books: **R279,000.00**

Net Turnover on Academic Books: **R 0**

- These figures represent 10/10 smaller publishers.
- **Combined total net turnover** on co-produced titles of the participating larger and smaller publishers: **R20,542,674.00**
- **Combined total net turnover** on co-produced titles per category for participating larger and smaller publishers and **percentages**:
  - Trade: R4,109,674.00 (20% of category total)
  - Educational: R16,433,000.00 (80% of category total)
  - Academic: R0.00 (0% of category total)

## Once-off Income

### LARGER PUBLISHERS



#### Notes

- These figures represent 15/15 larger publishers.

### SMALLER PUBLISHERS

Net Turnover on Trade Books: **R 0**

Net Turnover on Educational Books: **R26,000.00**

Net Turnover on Academic Books: **R 0**

- These figures represent 10/10 smaller publishers.
- **Combined total net turnover** on once-off income of the participating larger and smaller publishers: **R14,633,958.00**
- **Combined total net turnover** on once-off income per category for participating larger and smaller publishers and **percentages**:
  - Trade: R14,177,958.00 (96.8% of category total)
  - Educational: R456,000.00 (3.2% of category total)
  - Academic: R0.00 (0% of category total)

**Combined total net turnover** on all sub-sectors of participating larger and smaller publishers:

- Trade: R602,684,319.00 (37.4% of total turnover)
- Education: R886,872,775.00 (55.1% of total turnover)
- Academic: R119,793,137.00 (7.5% of total turnover)

### Summary

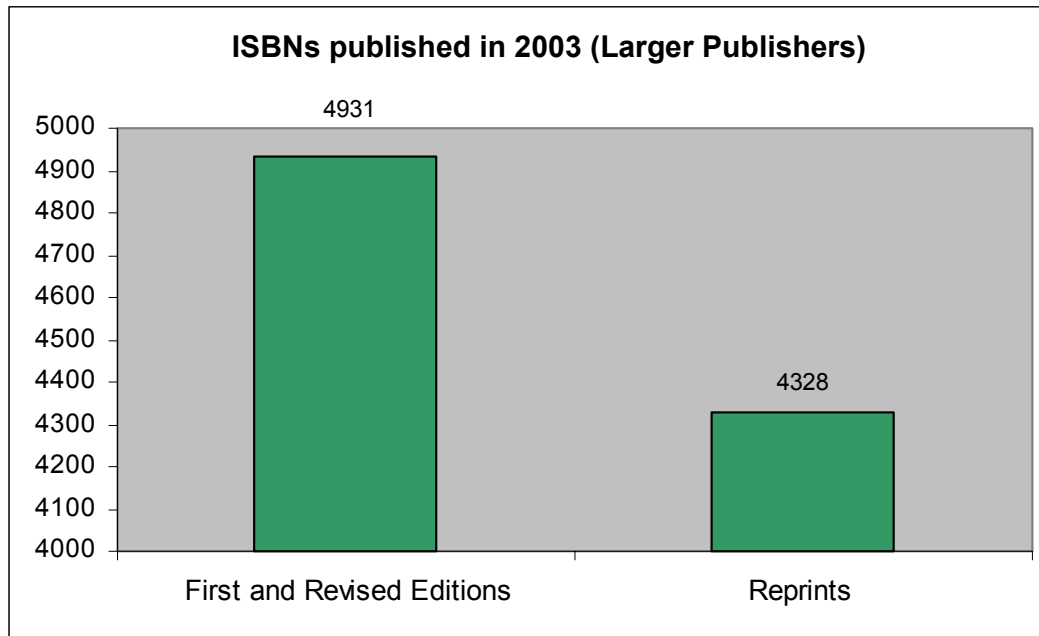
**Net turnover** of larger publishers in terms of categories and sub-sectors, also expressed as **percentages**

	Locally produced	Imported	Co-produced	Once-off	Total
Trade	R264,652,030	R313,453,881	R4,109,674	R14,177,958	R596,393,543
Trade %	44.38%	52.56%	0.69%	2.38%	100.00%
Education	R798,318,549	R68,609,011	R16,154,000	R430,000	R883,511,560
Edu %	90.36%	7.77%	1.83%	0.05%	100.00%
Academic	R74,493,888	R44,628,238	R0	R0	R119,122,126
Acad %	62.54%	37.46%	0.00%	0.00%	100.00%
Total	R1,137,464,467	R426,691,130	R20,263,674	R14,607,958	R1,599,027,299

## Question 2 – Production Profile

*How many ISBNs (produced locally) were made available to the South African market between 1 January 2003 and 31 December 2003?*

### LARGER PUBLISHERS

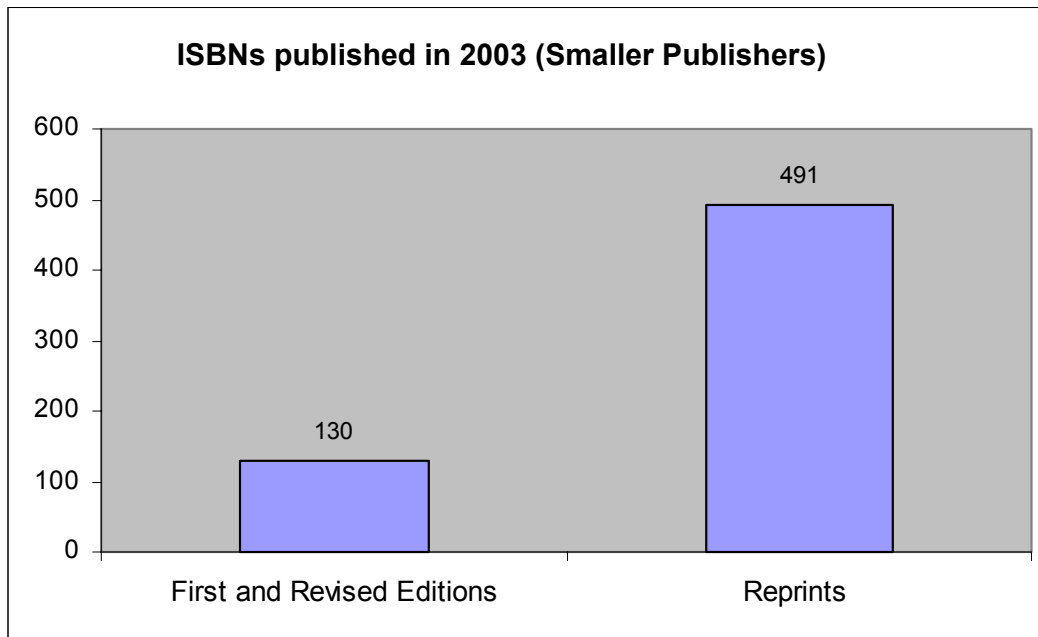


### Notes

- These figures are representative of 14/15 larger publishers.
- **Total number of titles** (first and revised editions and reprints) published by 14 larger publishers during 2003: **9,259**.
- **Total number of ISBNs in print** for the South African market, published by 15 larger publishers during 2003: Cannot be calculated as responses to this question were inconsistent.



## SMALLER PUBLISHERS



### Notes

- These figures are representative of 10/10 smaller publishers.
- **Total number of titles** (first and revised editions and reprints) published by 10 smaller publishers during 2003: **621**.
- **Total number of ISBNs in print** for the South African market, published by 10 smaller publishers during 2003: **1,487**. This figure refers to local titles in print for the South African market; it does not refer to titles available and accessible internationally.

**Combined number of first and revised editions** published by participating larger and smaller publishers: **5,061**.

**Combined number of reprints** published by participating larger and smaller publishers: **4,819**.

**Combined total of first & revised and reprints** published by participating larger and smaller publishers: **9,880**.

**Comparison with Snapshot 2002**

	<b>2002</b>	<b>2003</b>	<b>Percentage growth</b>
<b>NUMBER OF QUESTIONNAIRES USED</b>	Core list = 64 Questionnaires used = 32 [17 Large+15 Small]	Core list = 54 Questionnaires used = 24 [14 Large +10 Small]	
<b>PRODUCTION PROFILE</b>			
<b>First and revised editions</b>	2,950	5,061	71.6%
<b>Reprints</b>	4,369	4,819	10.3%
<b>Total</b>	7,319	9,880	35%

### Question 3 – Author Profile

*How many authors of titles in print for the South African market received royalties between 1 January 2003 and 31 December 2003?*

#### **LARGER PUBLISHERS**

Data in the correct format was provided by 15/15 participating publishers. The **total number of authors** to whom royalties were paid during 2003 is **11,408**, and the **total number of other parties** to whom royalties were paid during 2003 is **505**.

#### **SMALLER PUBLISHERS**

Data in the correct format was provided by 10/10 participating publishers. The **total number of authors** to whom royalties were paid during 2003 is **138**, and the **total number of other parties** to whom royalties were paid during 2003 is **22**.

The **combined total number of authors and other parties** to whom the participating larger and smaller publishers paid royalties during 2003 is **12,073**.

#### **Comparison with Snapshot 2002**

	<b>2002</b>	<b>2003</b>
<b>NUMBER OF QUESTIONNAIRES USED</b>	Core list = 64 Questionnaires used = 32 [17 Large+14 Small]	Core list = 54 Questionnaires used = 25 [15 Large +10 Small]
<b>AUTHOR PROFILE</b>		
<b>Total number of authors and other entities that received royalties</b>	<b>8,309</b>	<b>12,073</b>
When the total number of authors and other entities that received royalties in 2003 is compared to the same total number in 2002, there has been a growth of 45.3%.		

#### Question 4 – Royalty Profile

*What is the percentage royalty paid to authors (including estates, etc.) expressed as a percentage of the turnover figure provided in Question 1?*

#### **LARGER PUBLISHERS**

Data was provided by 13/15 participating publishers. The average % royalty in terms of these publishers' total net turnover paid out to authors and/or third parties during 2003 is **10.12%**, ranging from 4.7% to 15% per publisher.

The **actual royalties** paid out by the publishers (calculated on the percentage royalty and the net turnover provided by individual publishers) is **R136,129,200.00**. This figure, however, represents 8.18% of the total net turnover of the 13 larger companies that provided data.

Note that these figures do not reflect the average percentage royalty per individual publisher or per individual author.

#### **SMALLER PUBLISHERS**

Data was provided by 10/10 participating publishers. Three publishers indicated that they negotiate a fixed fee with authors.

It is not realistic to calculate the **average % royalty** in terms of **total net turnover** paid out to authors and/or third parties during 2003 due to the wide discrepancy between individual companies, which results in a skewed figure. The **actual royalties** paid out by the seven individual companies (calculated on the percentage royalty and the net turnover provided by the individual publishers) is **R1,125,465.00**. This figure represents 7.76% of the total net turnover of the 7 smaller companies that provided data.

Note that these figures do not reflect the average percentage royalty per individual publisher or per individual author.

## Question 5 – Employment Profile

*How many permanent, temporary and freelance employees were on payroll during the 2003/2004 financial year? Information is provided according to the following breakdown: race, gender, job category.*

### Note

- The employment profiles are representative of 15/15 larger publishers and 10/10 smaller publishers.

### Summary 2003

- Total number of **employees** employed by participating larger publishers: **2,893** + 260 (freelancers of one company that was not able to provide a breakdown according to race, gender and job categories) = **3,153**
- Total number of **employees** employed by participating smaller publishers: **93**
- Combined total number of **employees** employed by participating larger and smaller publishers: **3,246**

### Comment

According to the 2002 survey 2,865 people were employed by 17 larger publishers and 149 people by 15 smaller publishers, adding up to **3,014**. Since the 2002 and 2003 samples differ, comparisons between the employment figures of 2002 and 2003 and deductions about growth or decline are complicated.

- Total number of **permanent employees** employed by participating larger publishers: **1,699** (= 53.9% of 3,153)
- Total number of **permanent employees** employed by participating smaller publishers: **40** (=43% of 93)
- Combined total number of **permanent employees** employed by participating larger and smaller publishers: **1,739** (= 53.6% of 3,246)

- Total number of **temporary and freelance employees** employed by participating larger publishers: **1,454** (= 46.1% of 3,153)
- Total number of **temporary and freelance employees** employed by participating smaller publishers: **53** (=57% of 93)
- Combined total number of **temporary and freelance employees** employed by participating larger and smaller publishers: **1507** (= 46.4% of 3,246)
  
- Combined total number of **males** employed by participating larger and smaller publishers: **1,174** (= 39.3% of 2,986)
- Combined total number of **females** employed by participating larger and smaller publishers: **1,812** (= 60.7% of 2,986)

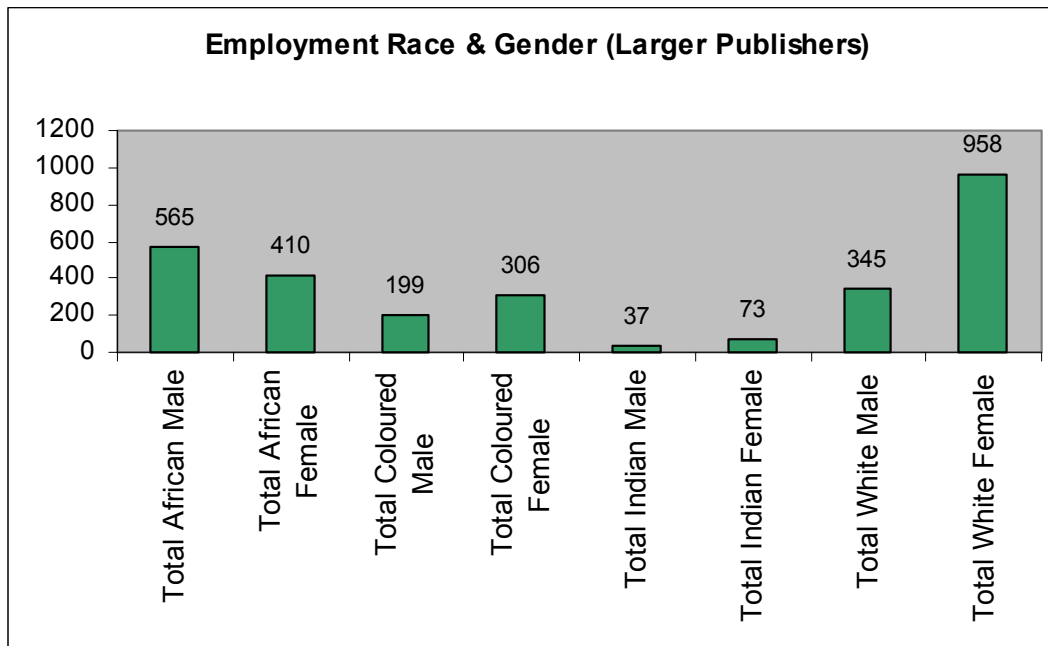
These figures do not include the above-mentioned 260 freelancers.

- Combined total number of **Africans** employed by participating larger and smaller publishers: **993** (= 33.3% of 2,986)
- Combined total number of **Coloureds** employed by participating larger and smaller publishers: **509** (= 17% of 2,986)
- Combined total number of **Indians** employed by participating larger and smaller publishers: **110** (= 3.7% of 2,986)
- Combined total number of **whites** employed by larger and smaller publishers: **1,374** (= 46% of 2,986)
- Combined total number of **blacks** employed by larger and smaller publishers: **1,612** (= 54% of 2,986)

These figures do not include the above-mentioned 260 freelancers.

## Employment profile according to race & gender

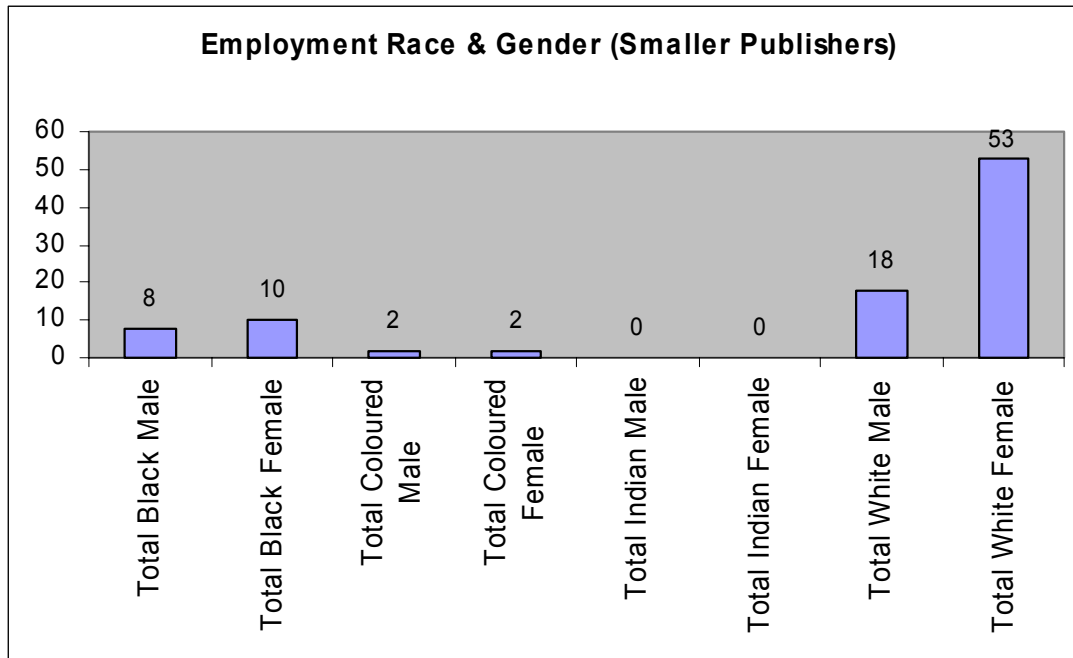
### LARGER PUBLISHERS



#### Notes

- These figures do not include the above-mentioned 260 freelancers.
- Total number of **males** employed by the participating larger publishers: **1,146**
- Total number of **females** employed by the participating larger publishers: **1,747**
  
- Total number of **Africans** employed by the participating larger companies: **975**
- Total number of **Coloureds** employed by the participating larger companies: **505**
- Total number of **Indians** employed by the participating larger companies: **110**
- Total number of **whites** employed by the participating larger companies: **1,303**
  
- Total number of employees employed by the participating larger publishers:  $2,893 + 260 =$   
**3,153**

## SMALLER PUBLISHERS



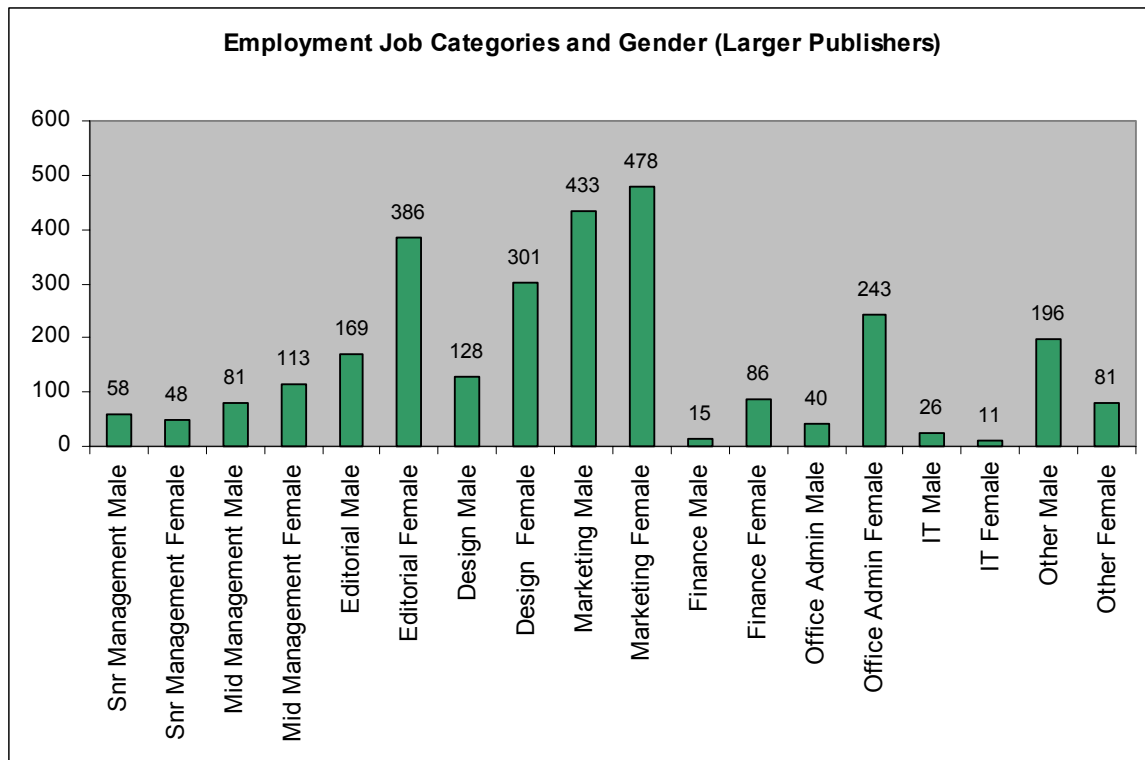
### Notes

- Total number of **males** employed by the participating smaller publishers: **28**
- Total number of **females** employed by the participating smaller publishers: **65**
  
- Total number of **Africans** employed by the participating smaller publishers: **18**
- Total number of **Coloureds** employed by the participating smaller publishers: **4**
- Total number of **Indians** employed by the participating smaller publishers: **0**
- Total number of **whites** employed by the participating smaller publishers: **71**
  
- Total number of employees employed by the participating smaller publishers: **93**



## Employment profile according to job categories & gender

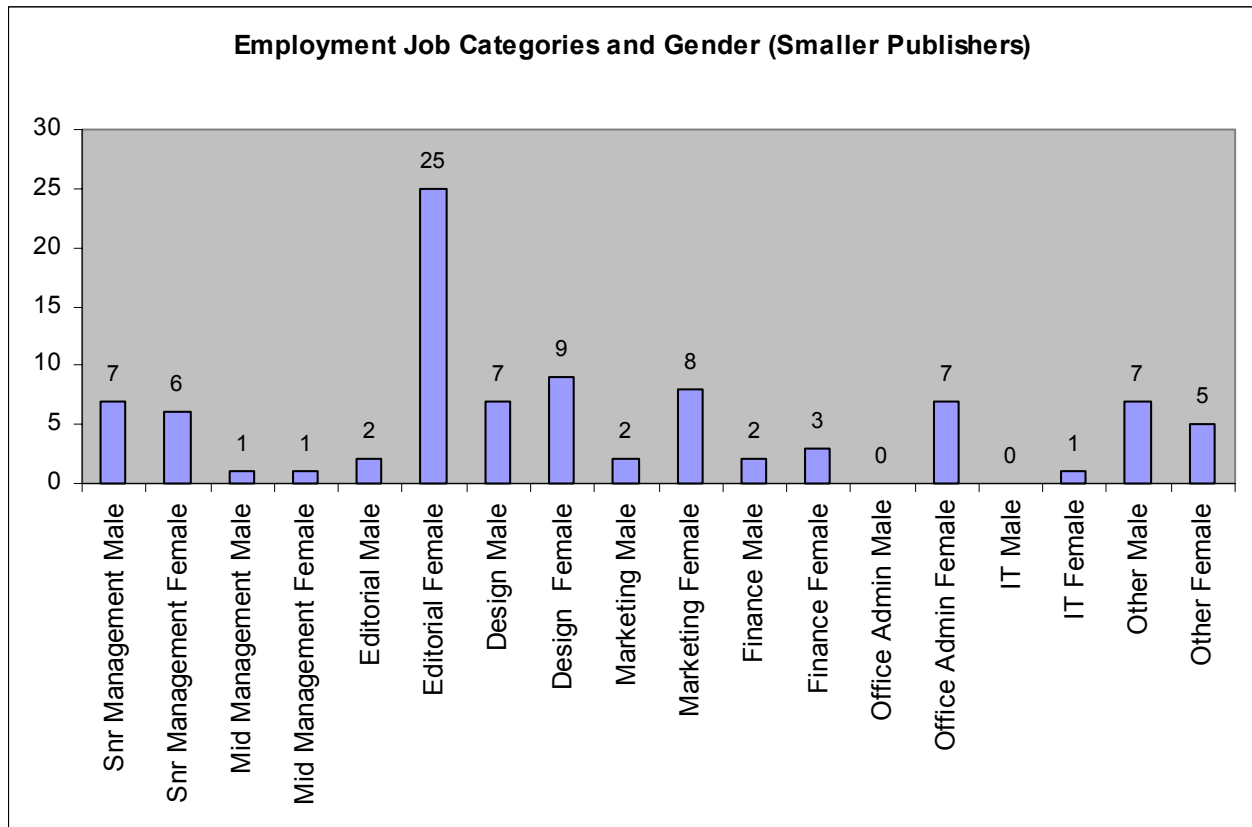
### LARGER PUBLISHERS



#### Notes

- These figures include permanent, temporary and freelance employees.
- These figures do not include the above-mentioned 260 freelancers.
- **Total number** of employees employed by participating larger publishers:  $2,893 + 260 = 3,153$

## SMALLER PUBLISHERS



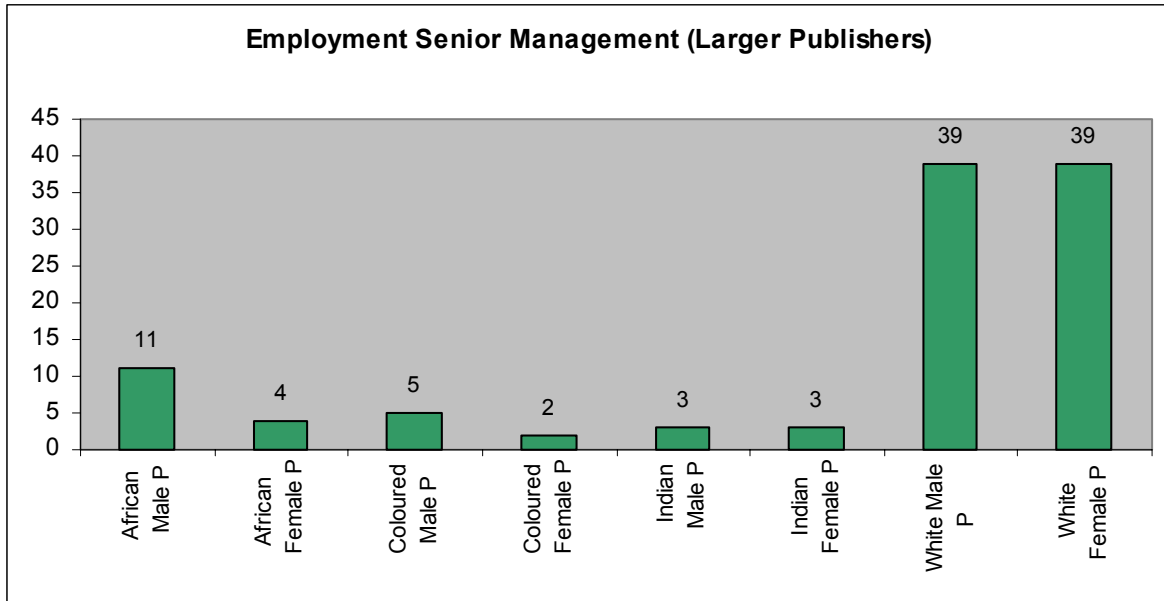
### Notes

- These figures include permanent, temporary and freelance employees.
- **Total number** of employees employed by participating smaller publishers: **93**
- **Combined total number** of employees employed by participating larger and smaller publishers: **3,246**

## Employment profile according to job categories

### Senior Management

#### LARGER PUBLISHERS



#### Notes

- Total number of Permanent **black** employees in Senior Management: **28**
- Total number of Permanent **white** employees in Senior Management: **78**
- **Total number** of employees in Senior Management for larger publishers: **106**

#### SMALLER PUBLISHERS

Senior Management African Female Permanent – 1

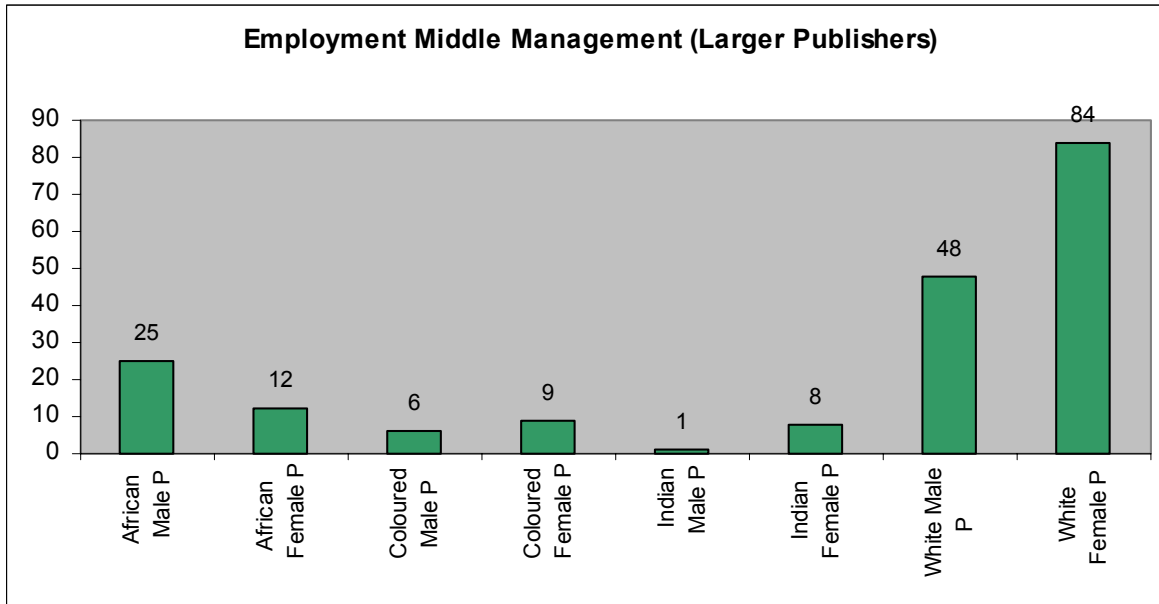
Senior Management White Male Permanent – 7

Senior Management White Female Permanent – 5

- **Total number** of employees in Senior Management for smaller publishers: **13**
- **Combined total number** of employees in Senior Management for participating larger and smaller publishers: **119**

## Middle Management

### LARGER PUBLISHERS



#### Notes

- The graph does not include 1 Temporary white male.
- Total number of Permanent **black** employees in Middle Management: **61**
- Total number of Permanent **white** employees in Middle Management: 132 + 1 = **133**
- **Total number** of employees in Middle Management for larger publishers: **194**

### SMALLER PUBLISHERS

Middle Management African Male Permanent – 1

Middle Management White Female Permanent – 1

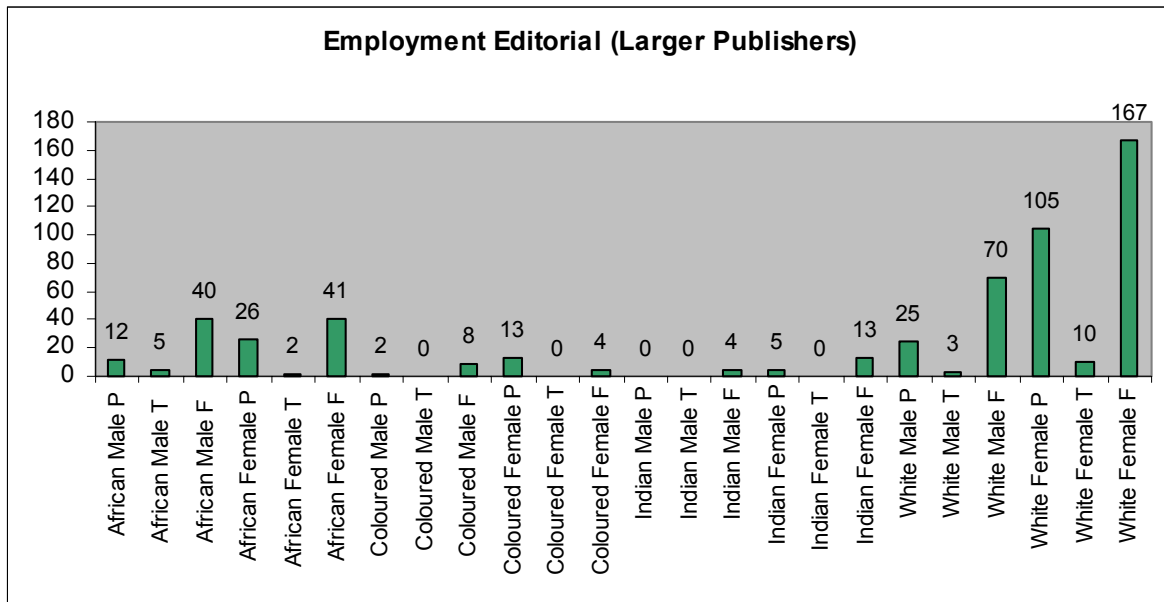
- **Total number** of employees in Middle Management for smaller publishers: **2**
- **Combined total number** of employees in Middle Management for participating larger and smaller publishers in Middle Management: **196**

## Comment

- Total number of **employees** in Senior and Middle Management for 15 participating larger publishers in 2003: **300**. In 2002 there were 209 employees in Management for 17 participating larger publishers.
- Total number of **black** employees in Senior and Middle Management for 15 participating larger publishers in 2003: **89**. In 2002 there were 72 black employees in Management for 17 participating larger publishers. There has been a growth in the number (=17) of black employees in the Management job category.
- Black employees represent 29.7% of the total number of employees in the Management job category for 15 participating larger publishers in 2003, compared to 34.4% in 2002. Therefore, even though there has been a growth in the number of black employees in Management (= 23.6%), the growth in white employees in this job category was considerably higher (from 137 in 2002 to 211 in 2003 = 54%).

## Editorial

### LARGER PUBLISHERS



### Notes

- These figures include permanent (P), temporary (T) and freelance (F) employees.
- Total number of **black** employees in Editorial: **175**
- Total number of **white** employees in Editorial: **380**
- **Total number** of employees in Editorial for larger publishers: **555**

### SMALLER PUBLISHERS

Editorial African Female Freelance – 3

Editorial White Male Freelance – 2

Editorial White Female Permanent – 5

Editorial White Female Freelance – 17

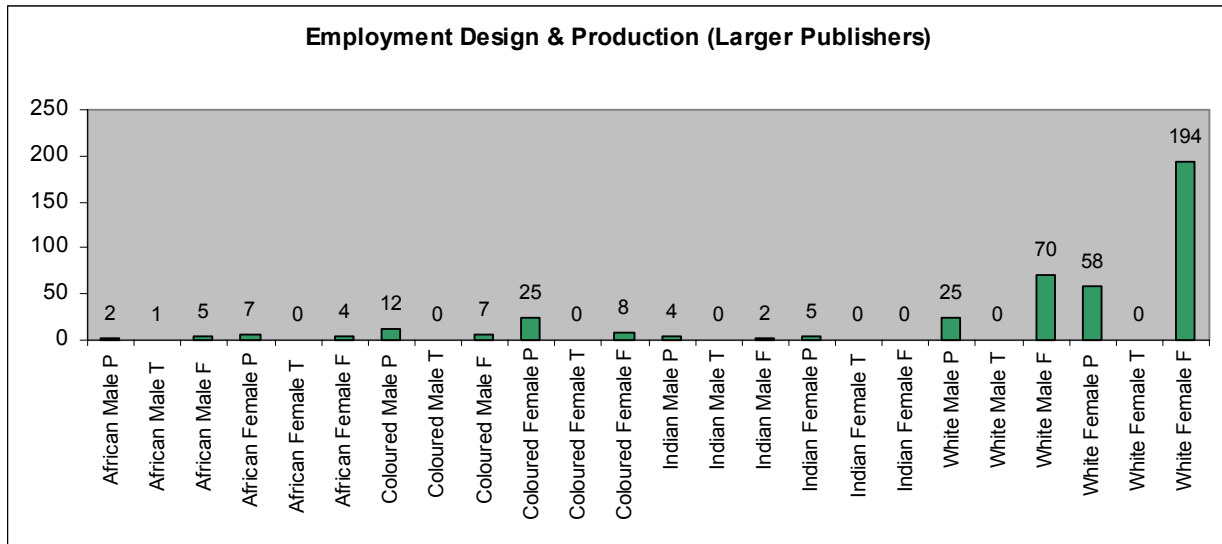
- **Total number** of employees in Editorial for smaller publishers: **27**
- **Combined total number** of employees in Editorial for participating larger and smaller publishers: **582**

## Comment

- Total number of **employees** in Editorial for 15 participating larger publishers in 2003: **555**. In 2002 there were 608 employees in Editorial for 17 participating larger publishers.
- Total number of **black** employees in Editorial for 15 participating larger publishers in 2003: **175**. In 2002 there were 243 black employees in Editorial for 17 participating larger publishers. There has been a decline in the number (= 68) of black employees in the Editorial job category.
- Black employees represent 31.5% of the total number of employees in the Editorial job category for 15 participating larger publishers in 2003, compared to 40% in 2002. There has been a decline in black employees in Editorial, compared to a limited growth in the case of white employees in this job category.

## Design & Production

### LARGER PUBLISHERS



#### Notes

- These figures include permanent (P), temporary (T) and freelance (F) employees.
- Total number of **black** employees in Design & Production: **82**
- Total number of **white** employees in Design & Production: **347**
- **Total number** of employees in Design & Production for larger publishers: **429**

### SMALLER PUBLISHERS

Design Coloured Male Freelance – 1

Design White Male Temporary – 1

Design White Male Freelance – 5

Design White Female Permanent – 2

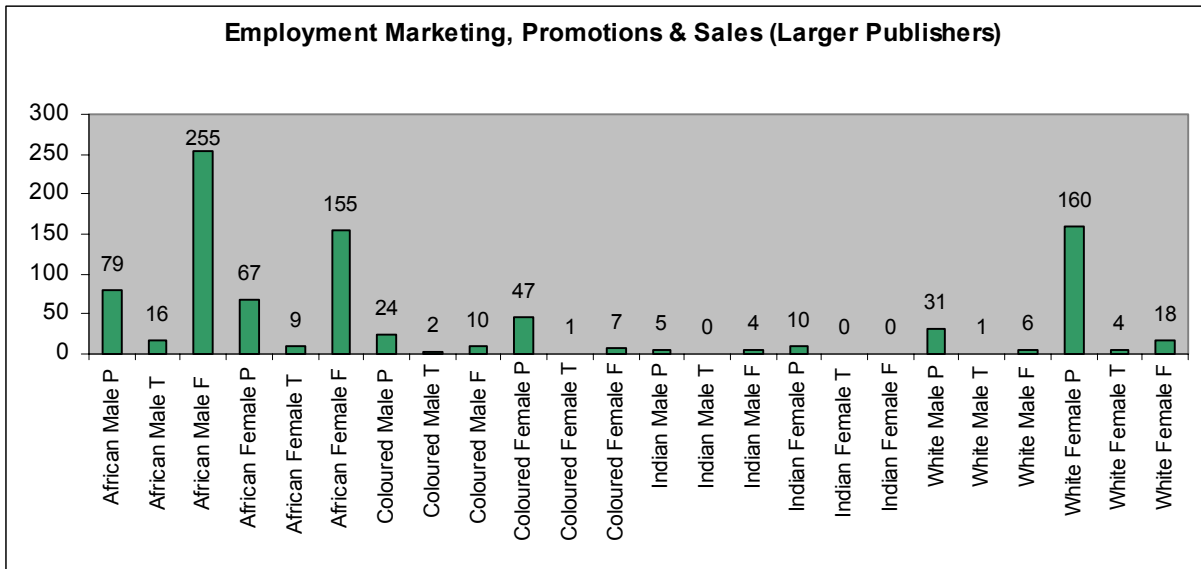
Design White Female Freelance – 7

- **Total number** of employees in Design & Production for smaller publishers: **16**
- **Combined total number** of employees in Design & Production for participating larger and smaller publishers: **445**
- Combined total number of employees in Design & Production in 2002: 346



## Marketing, Promotion & Sales

### LARGER PUBLISHERS



#### Notes

- These figures include permanent (P), temporary (T) and freelance (F) employees.
- Total number of **black** employees in Marketing, Promotions & Sales: **691**
- Total number of **white** employees in Marketing, Promotions & Sales: **220**
- **Total number** of employees in Marketing, Promotions & Sales for larger publishers: **911**

### SMALLER PUBLISHERS

Marketing African Male Permanent – 1

Marketing Coloured Female Freelance – 2

Marketing White Male Freelance – 1

Marketing White Female Permanent – 1

Marketing White Female Temporary – 1

Marketing White Female Freelance – 4

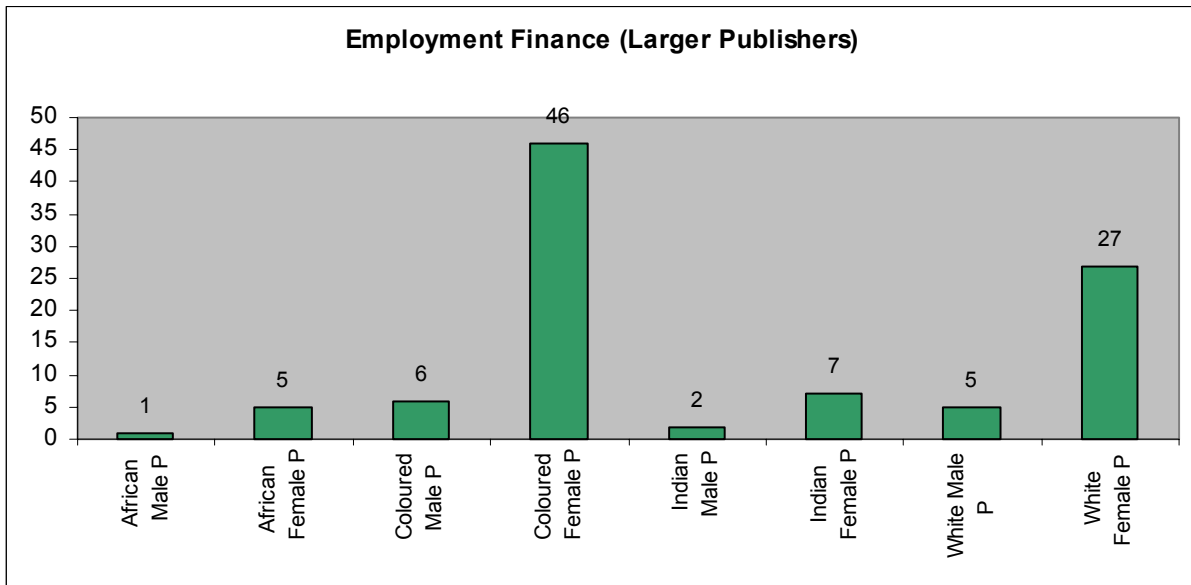
- **Total number** of employees in Marketing, Promotions & Sales for smaller publishers: **10**
- **Combined total number** of employees in Marketing, Promotions & Sales for participating larger and smaller publishers: **921**

## Comment

- Total number of **employees** in Marketing, Promotion & Sales for 15 participating larger publishers in 2003: **911**. In 2002 there were 637 employees in Marketing, Promotion & Sales for 17 participating larger publishers. There has been a definite growth in the Marketing, Promotion & Sales job category.
- Total number of **black** employees in Marketing, Promotion & Sales for 15 participating larger publishers in 2003: **691**. In 2002 there were 481 black employees in Marketing, Promotion & Sales for 17 participating larger publishers. There has been a growth in the number (= 210) of black employees in the Marketing, Promotion & Sales job category.
- Black employees represent 75.9% of the total number of employees in the Marketing, Promotion & Sales job category for 15 participating larger publishers in 2003, compared to 75.5% in 2002.

## Finance

### LARGER PUBLISHERS



#### Notes

- The graph does not include 1 Temporary African male and 1 Freelance white female.
- Total number of Permanent **black** employees in Finance: **68**
- Total number of Permanent **white** employees in Finance: **33**
- **Total number** of employees in Finance for larger publishers: **101**

### SMALLER PUBLISHERS

Finance White Male Permanent – 1

Finance White Male Freelance – 1

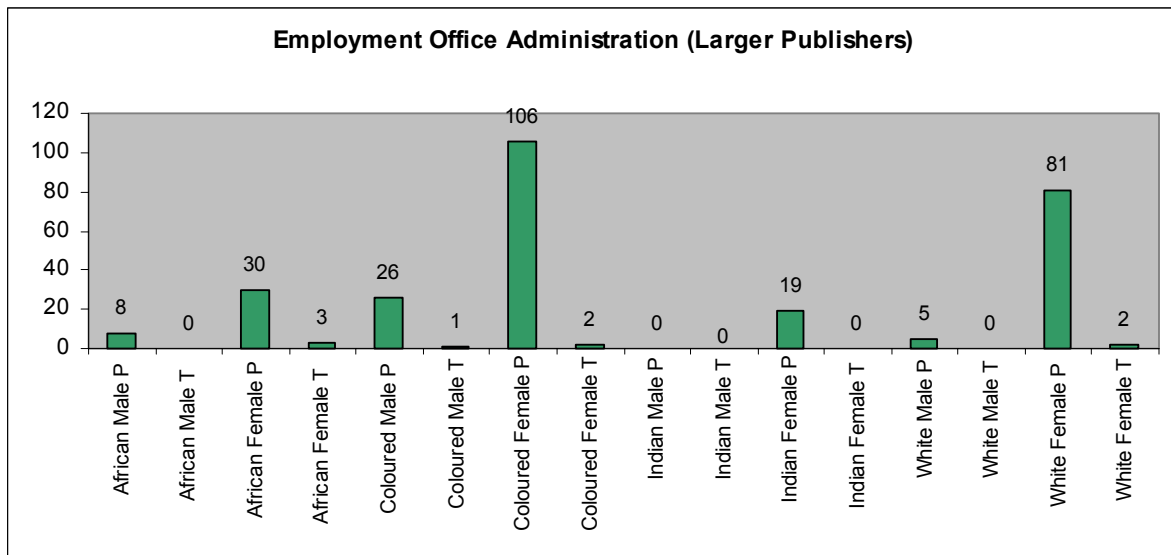
Finance White Female Permanent – 2

Finance White Female Freelance – 1

- **Total number** of employees in Finance for smaller publishers: **5**
- **Combined total number** of employees in Finance for participating larger and smaller publishers: **106**

## Office Administration

### LARGER PUBLISHERS



#### Notes

- These figures include permanent (P) and temporary (T) employees.
- Total number of **black** employees in Office Administration: **195**
- Total number of **white** employees in Office Administration: **88**
- **Total number** of employees in Office Administration for larger publishers: **283**

### SMALLER PUBLISHERS

Administration African Female Permanent – 2

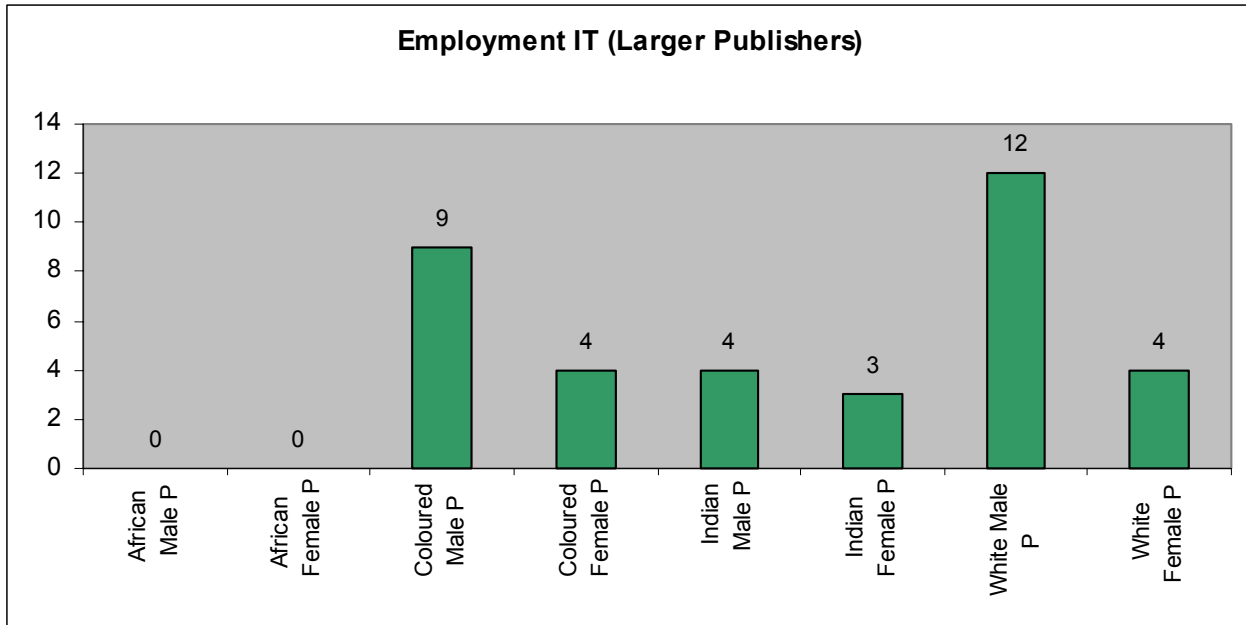
Administration White Female Permanent – 4

Administration White Female Temporary – 1

- **Total number** of employees in Office Administration for smaller publishers: **7**
- **Combined** total number of employees in Office Administration for participating larger and smaller publishers in 2003: **290**
- Combined total number of employees in Finance and Office Administration in 2003: **396**
- Combined total number of employees in Finance and Office Administration in 2002: **377**

## Information Technology

### LARGER PUBLISHERS



#### Notes

- The graph does not include 1 Freelance Coloured male.
- Total number of **black** employees in IT: **21**
- Total number of **white** employees in IT: **16**
- **Total number** of employees in IT for larger publishers: **37**

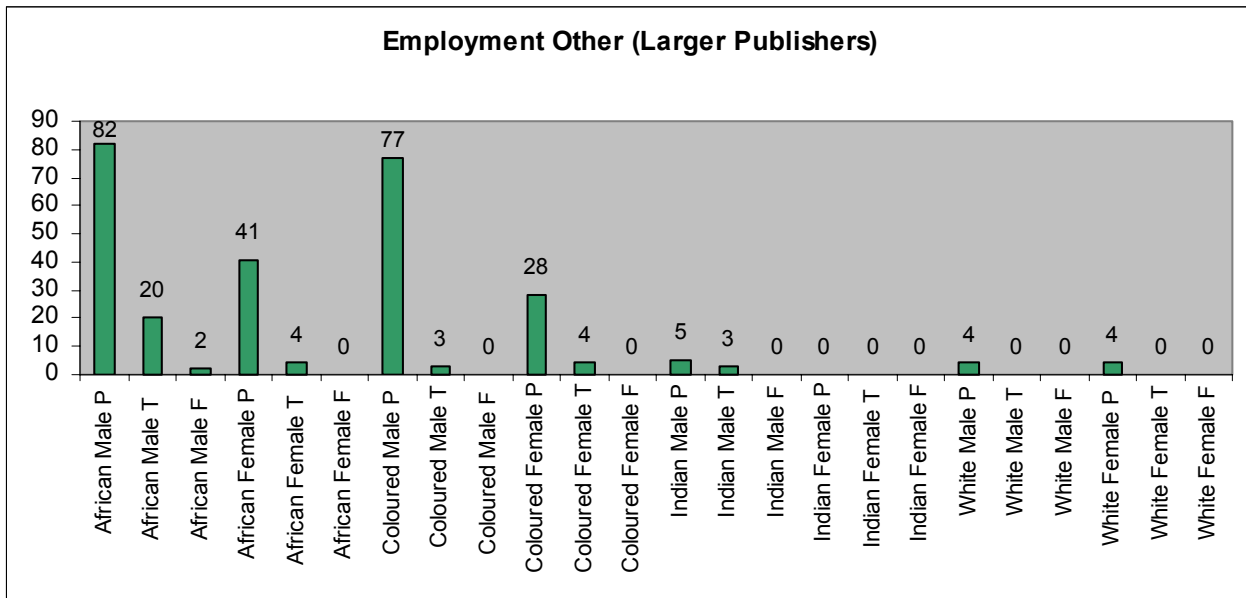
### SMALLER PUBLISHERS

IT White Female Permanent – 1

- **Total number** of employees in IT for smaller publishers: **1**
- **Combined** total number of employees in IT for participating larger and smaller publishers in 2003: **38**
- Combined total number of employees in IT in 2002: 43

## Other Positions

### LARGER PUBLISHERS



#### Notes

- These figures include permanent (P), temporary (T) and freelance (F) employees.
- Total number of **black** employees in Other positions: **269**
- Total number of **white** employees in Other positions: **8**
- **Total number** of employees in Other positions for larger publishers: **277**

### SMALLER PUBLISHERS

Other Positions African Male Temporary – 6

Other Positions African Female Permanent – 4

Other Positions Coloured Male Permanent – 1

Other Positions White Female Permanent – 1

- Total number of employees in Other positions for smaller publishers: **12**
- **Combined** total number of employees in Other positions in 2003: **289**
- Due to different categorization it is not possible to make a true comparison with the 2002 numbers. In 2002 the combined number of employees in Support and Other was 456.

**Question 6 – Ownership Profile**

**LARGER PUBLISHERS**

*Legal status of 15/15 participating larger publishers*

Sole Proprietor	Closed Corporation	Partnership	Private Company	Public Company	NGO	Trust	Community Based	Section 21	Other
0	0	0	10 publishers	2 publishers	1 publisher	0	0	0	2 publishers

*South African and international ownership of 15/15 participating larger publishers*

<b>South African ownership</b>					
0%	1-24%	25-49%	50-74%	75-99%	100%
5 publishers		1 publisher	1 publisher	3 publishers	5 publishers
<b>International ownership</b>					
100%	75-99%	50-74%	25-49%	1-24%	0%
5 publishers	1 publisher	1 publisher		3 publishers	5 publishers

**SMALLER PUBLISHERS**

*Legal status of 10/10 participating smaller publishers*

Sole Proprietor	Closed Corporation	Partnership	Private Company	Public Company	NGO	Trust	Community Based	Section 21	Other
1 publisher	5 publishers	0	3 publishers	0	0	0	0	0	1 publisher

*South African and international ownership of 10/10 participating smaller publishers*

The participating smaller publishers indicated that they are **100%** South African owned.

## **CONCLUSION**

The following broad conclusions can be drawn:

- A marked increase in turnover, number of authors and title production are the most obvious trends when the 2002 and 2003 surveys are compared.
- Notwithstanding the fact that the report does not contain data from all 54 holding companies/publishers that formed the core list of the 2003 survey, feedback from the 15 larger companies (from the PASA F–L membership bands) included in the report ensures that it provides a representative perspective.
- Based on the reported turnover of 25 companies and the estimated maximum turnover of the remaining 29 companies (based on their PASA membership bands) the reported turnover profile represents 97.82% of the sample.
- On the basis of an interim report presented to the PASA Genco, the association has already indicated confidence in the research process. A decision was reached that the survey will become an ongoing annual project for the foreseeable future and that the scope of the report should be widened to include more financial, human resources and production statistics. The report will in future be known as *The PASA Annual Industry Survey (year)*. The Research Team trusts that all PASA members will be convinced of the usefulness of the data, and that all relevant members will participate in future.

**Francis Galloway**

**Theo Bothma**

**Colette du Plessis**

**Rudi MR Venter**

**August 2005**