

UNIVERSITY OF PRETORIA

SCHOOL OF INFORMATION TECHNOLOGY

**DEPARTMENT OF INFORMATION SCIENCE
PUBLISHING STUDIES**

***REPORT: PASA/SABA
SNAPSHOT INDUSTRY SURVEY 2002***

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1. BACKGROUND

Useful and reliable statistical data on the South African book publishing and book selling industry is not readily available. In the past, the Publishers' Association of South Africa (PASA) made several efforts to conduct surveys of the local book trade, but the results were so incomplete that no reliable picture could emerge; the government did not keep track of contextualised book publishing statistics either. The *South African National Bibliography* provides some statistics of value, but it is primarily organised as a tool for librarians and its inclusiveness limits its use as a source for book industry statistics.

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 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).

Given the above, it was agreed by the members of PASA and SABA 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 of this survey was to provide a broad overview of the shape and size of the local book industry during 2002.

2. *PASA SNAPSHOT INDUSTRY SURVEY 2002*

2.1 DATA COLLECTION PROCESS

Based on the membership list supplied by the PASA office an **address list** was compiled that contains contact details and basic information on the core business of the **151** entities that were registered as PASA **members** at that stage. It is very important to take note of the fact that a “member” of PASA does not necessarily constitute a **separate company**, because different divisions/imprints of a company may be registered as individual PASA members, while the holding company itself may or may not be registered as a member. In consultation with the PASA Exco it was decided that the survey would be targeted at the executive officers (CEOs/MDs) of holding companies involved in local ISBN-based book publishing.

At this stage, therefore, some of the PASA members (including those members who were clearly involved only in the distribution of international imprints, associate members rendering publishing related services and members that are divisions/imprints of holding companies) were not included in the e-mail address list that was created for the distribution of the *Snapshot Industry Survey 2002* Questionnaire. This **survey address list** originally consisted of **117** entities, but still included entities possibly irrelevant for the survey because the researchers could not establish their status beyond doubt from the available information (e.g. entities that represented additional members per holding company, members not involved in ISBN-based local book publishing). Eventually it became clear that the following **64** companies (larger and smaller publishers), that are either PASA members or affiliated with the association because one or more of their divisions/imprints being a PASA member, are involved in local ISBN-based book publishing:

Actua Press	New Africa Books
Anansi	New Dawn Publishers
Bateleur Books	New Generation Publishers
Bell Roberts Print & Publishing	New Holland Publishers SA
Brenthurst Press	New Readers Publishers
Briza Publications	Oxford University Press
Cambridge University Press	Palm Publishers
CLS Publishers	Pan MacMillan SA
Creative Learning	Penguin Books SA
Early Learning Resource Unit	Quartet Sales & Marketing
Ebony Books	Random House
Effective Teaching Publishers	Reading Matters

Heinemann	Shuter & Shooter
Idasa	Simron t/a Intersoft
Illitha Publishers	Solo Collective
Jacana Media	STE Publishers
Juta Group	Study Opportunities
Lannice Snyman	The Reader's Digest Association SA
LAPA Publishers	Troupant Publishers
Learning Channel Print	Umtapo Publishers & Booksellers
Learning Matters Africa	UNISA Press
Lectio Publishers	University of Cape Town Press
Little Happy People	University of Natal Press
Lovedale Press	Viva Books
MacMillan SA	Vivlia Publishers & Booksellers
Maskew Miller Longman	Wild Dog Press
Maths Centre for Primary Teachers	Witwatersrand University Press
Mbira Press	WJ Flesch & Partners
Metc	Wordsmiths Publishing
Metz Press	Xpose Media & Publishing
Nam Publishers	Y Press
Nasboek (now Via Afrika)	Zachen Publishers

The Questionnaire was designed in consultation with the members of the PASA Exco. Participants in the survey 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); **local divisions/imprints** and **international imprints/agencies**. The five survey Questions focused on the holding company's **turnover profile**; **production profile**; **author profile**; **royalty profile** and **employment profile** in South Africa. The CEO/MD of the company was requested to include accumulated and consolidated information pertaining to all divisions/imprints of the company. Exact (or as accurate as possible approximations of) figures, numbers and dates were requested.

The Questionnaire, as well as a covering letter from the PASA Exco that contextualised the *Snapshot Industry Survey 2002*, were sent to the entire survey e-mail address list (containing 117 entities) on **3 November 2003**. It was clearly stipulated that the completed Questionnaire should be returned to Francis Galloway via e-mail to a dedicated e-mail address or by registered post to the postal addresses of the project leaders by the cut-off date of **24 November 2003**. Instances of message delivery failure were addressed telephonically and the covering letter and Questionnaire

were then resent by e-mail to adjusted electronic addresses, or posted to those who could not receive electronic mail.

On **10 November 2003** the PASA office sent a message to all of the 151 PASA members alerting them to the *Snapshot Industry Survey 2002* in order to reach members who did not originally receive the documents and who were of the opinion that they ought to be included in the survey. Three queries were received via the PASA office and followed up.

Four subsequent reminders (including the covering letter and Questionnaire) of the cut-off date for feedback on the *Snapshot Industry Survey 2002* were sent via the updated e-mail survey address list on **17 November 2003**, **28 November 2003**, **9 December 2003** and **19 January 2004**. During this time personal contact was made with many of the entities on the survey list and a sifting process was undertaken. Specific relevant role-players were identified and personal reminders and urgent requests for participation (including the covering letter and Questionnaire) were sent to a number of CEOs/MDs of holding companies on **10 February 2004**.

The receipt of each completed Questionnaire was individually acknowledged via e-mail and kept on record.

On **16 February 2004** the first interim *Progress Report: Snapshot Industry Survey 2002* was tabled. At the time (almost three months after the original cut-off date) 24 completed Questionnaires had been received and none of the specific companies that had been personally targeted had returned the Questionnaire. The cut-off date for feedback was postponed to **12 March 2004**, and the still outstanding pursued Questionnaires were followed up telephonically and by e-mail, but without much success.

On **30 March 2004** the second interim *Progress Report: Snapshot Industry Survey 2002* was tabled. At the time 26 completed Questionnaires had been received. It was then decided by the research team and PASA to focus on the pursuing of outstanding Questionnaires which had to be completed by medium and large local book publishing companies (these role-players were identified according to the PASA turnover band/membership fee structure).

On **15 April 2004** the third interim *Progress Report: Snapshot Industry Survey 2002* was tabled in Cape Town during a meeting with Hanri Pieterse, who is the PASA Exco representative for this research project, and Dudley Schroeder, the recently appointed executive director of PASA. By that date 28 completed Questionnaires had been received. During this meeting it was agreed that the PASA office would assist in the pursuing of specific outstanding Questionnaires.

A summary of progress for the PASA Genco was tabled on **28 April 2004** and during this meeting it was decided that a final report should be drafted by the end of May, based on the feedback received up to **19 May 2004**.

By the final cut-off date 34 completed Questionnaires were received. The data provided in 2 of these completed Questionnaires (by Book Promotions and John Wiley) were, however, not used in the analysis of the survey because these members do not publish locally. The remaining 32 completed Questionnaires represent 55 members (36%) of the PASA membership list of 151 entities (that includes for example associate members and entities not primarily involved in local ISBN-based book publishing). These 32 Questionnaires, however, represent half of the 64 (50%) holding companies involved in local ISBN-based book publishing.

The final *Report: PASA/SABA Snapshot Industry Survey 2002* therefore reflects feedback provided in 32 Questionnaires completed by 50% of the relevant sample; this nevertheless represents 97% of the total net turnover of all PASA-affiliated publishers involved in local ISBN-based book publishing (see page 10–11).

The following table lists the 34 completed Questionnaires according to holding company. It also 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. The 55 entities (including holding companies, divisions and imprints) indicated in CAPITAL LETTERS are those listed as members in the original PASA membership list.

Holding Companies	Local Publishing List/Imprints	International Publishing List/Imprints
ANANSI	Anansi	None
BELL-ROBERTS PRINT & PUBLISHING	Bell-Roberts	None

BOOK PROMOTIONS	Distributor of: Ampersand Press, Avian Demography Unit, Capricorn Publications, Carmel Art, Editor's Inc, Francolin Publishers (AIPA), George Poulos, Investor Education, John Voelcker Bird Book Fund (Roberts Birds), Joint Education Trust, K53 Project, Kalahari Raptor Centre, Lagarto Studios, Mutual & Federal Cricket Annual, National Publishing, Rainbird Publishers, SARFU Rugby Annual, Stonewall Books, Stormberg Publishers, Triple T Publishing, Wits UP, Woodbay Books & Guides for Africa	A&C Black (Adlard Coles, Christopher Helm, Herbert Press, Pica Press, RSPB, Sunflower Books, V&A Publications), Batsford (Brassey's, Conway Maritime Press, Putnam Aeronautical Books), California UP, Collins Educational, Continuum Group (Cassell Academic, Leicester UP, Mansell, Pinter, Geoffrey Chapman, Mowbray, St Vladimir's, A&C Black Religious, Athlone Press, Letts Higher Education, T&T Clark, Burns & Oates, Sheffield UP), Colum UP, David Fulton Publishers, Duckworth (Bristol Classical Press, Chatham Publishing, Capital Books), Geddes & Grosset, Guilford Press, Hodder Arnold Murray, Indiana UP, Industrial Press, ITDG Publishing, Nisbet, Jessica Kingsley Publishers, Kogan Page (Earthscan, Kogan Page Science), Letts Educational, Pluto Press, Princeton UP, Sheridan House, Taylor & Francis Group (Martin Dunitz, Routledge, Brunner, Europa, Garland, Gordon & Breach, Psychology Press, Spon Press, UCL Press, Harwood Academic, CRC, BIOS)
BRENTHURST PRESS	Brenthurst Press	None
BRIZA PUBLICATIONS	Briza	None
CAMBRIDGE UNIVERSITY PRESS	Cambridge University Press, ROEDURICO TRUST	None listed
CREATIVE LEARNING	Creative Learning Reading, Creative Learning Maths	None
Heinemann	HEINEMANN EDUCATIONAL, HEINEMANN HIGHER & FURTHER EDUCATION, Centaur, Heineman/Centaur, Lexicon	Ginn, Reed, Harcourt, Greenwood, Elsevier, Elsevier Science, Focal Press
JACANA MEDIA	Jacana Earth, Jacana Life, Jacana Fiction	None
JOHN WILEY	None	Wiley, Jossey Bass/Pfeiffer, Wiley VCH, Frommers/Dummies, Capstone Press
Juta Group	JUTA & CO, JUTA LAW, JUTA ACADEMIC, DOUBLE STOREY, JUTA GARIEP, Ace	None
LANNICE SNYMAN	Lannice Snyman	None
LAPA PUBLISHERS	Lapa	None
MACMILLAN SA	MACMILLAN ACADEMIC SA, CLEVER BOOKS, NOLWAZI EDUCATIONAL, RAVAN PRESS. EDUCATION LINK	Macmillan Companies, Nelson Thornes (New Way only)
MASKEW MILLER LONGMAN	Maskew Miller Longman, KAGISO, Phumelela, PEARSON EDUCATION SA	Pearson, Prentice Hall, Addison Wesley Longman, Ladybird, Disney, Egmont, more minor ones (not individually listed in Questionnaire)
MATHS CENTRE FOR PRIMARY TEACHERS	Maths Centre for Primary Teachers	None
METC	Metc	None

Nasboek (now Via Afrika)	<p>HUMAN & ROUSSEAU (Human & Rousseau, Best Books)</p> <p>JONATHAN BALL PUBLISHERS (Jonathan Ball, Ad Donker, Sunbird)</p> <p>Lux Verbi Bybelmedia (NG Kerk Uitgewers, Lux Verbi Bybel Media, Hugenote Uitgewers, Protea Uitgewers, Bybelkor, Waterkant Uitgewers, Mema Media, Nehemia Bible Institute, Hugenote Bybelinstituut)</p> <p>NASOU-VIA AFRIKA (Nasou, Via Afrika, Nasou/Via Afrika, Action, Afro, KZN Books, Acacia, Atlas Afritech)</p> <p>TAFELBERG (Tafelberg, Pharos, KWELA, Jasmyn, JL van Schaik general books, Quillerie, Homeros)</p> <p>VAN SCHAİK PUBLISHERS (JL van Schaik academic & school literature books, Academia, Van Schaik Publishers)</p>	<p>Jonathan Ball Publishers (Harper Collins, Hodder Headline, Orion, Simon & Shuster, Bloomsbury, Scholastic, Taschen, Time Warner USA, Sutton, Granta, Profile, Zondervan, Eerdmans, Mira)</p> <p>Lux Verbi Bybelmedia (Universal Designs/Argus, Arrow Publications, Augsburg/Fortress, Oasis (Bob Sorge), Bridge-Logos, Christ Camp Ministries (Mary Garrison Books), Concordia, Destiny Image, Evangelical Literature Prize (Seal of God), Foundation of Praise (Merlin Carothers), Group Publishing, Hendrickson, John Bevere Ministries, Kirkbride Bibles, Life Changes (Bob Mumford), Living Stream Ministries, Morning Star Publications, OM Literature (Dakes Bibles), Riverside/World Bibles, Standard Publishing, Victory House, Whitaker House/Anchor, World Wide Publications, YWAM)</p>
NEW AFRICA BOOKS	NEW AFRICA EDUCATION PUBLISHING, NEW AFRICA EDUCATION, DAVID PHILIP, SPEARHEAD, Songololo	None
NEW HOLLAND PUBLISHING SA	Struik, Struik Christian Books, Map Studio, Zebra, New Holland, Globetrotter	Nelson Books/Tommy, Nelson Bibles, W Publishing, Bethany House, Waterbrook, Kingsway, Broadman & Holman, Broadman Lifeway, Lion Publishing, Bantam Doubleday, Christian Focus, Monarch, Whitaker House, Destiny Image, Group Publishing, Harrison House, Servant Publications, Harvest House, Waverley Abbey House, Warner Faith, CWR
NEW READERS PUBLISHERS	New Readers	None
OXFORD UNIVERSITY PRESS	Oxford University Press	World Bank, American Psychiatric Press, Blackstone Press, Pearne Int.
PAN MACMILLAN SA	Pan Macmillan SA	Pan, Macmillan, Picador, Young Picador, Macmillan Children's Books, Walker, Frances Lincoln, Hodder Wayland, Teach Yourself, St Martin's Press, Henry Holt, Farrar Strauss Giroux, Gill & Macmillan, Newleaf, Sidgwick & Jackson, Guinness World Records, Pan Australia, Macmillan Australia, Tor UK, Tor US, Rodale, Palgrave, Ravan

PENGUIN BOOKS SA	Penguin Books SA	Atlantic Books, Berlitz, Canongate, Constable Robinson, Egmont, Egmont Children's Books, Chiken House, Mammoth, Faber & Faber, Sanctuary Publishing, Time Warner Books (Abacus, Little, Brown, Orbit, Warner, Virago), Octopus Group (Mitchell Beazley, Hamlyn, Phillips, Godsfield Press, Piatkus, Nelson Thornes, Virgin), Penguin (Penguin, Viking, Michael Joseph, Hamish Hamilton, Allen Lane, Frederick Warne, Puffin, Rough Guides, Dorling Kindersley)
QUARTET SALES & MARKETING	Fernwood, Briza, Rapid Phase, Snail Press, Dimsday, Word Out!	Apple, Arcadie, Andromedia, Barrington Stoke, Black Amber, Chrysalis, Conran, Harrap, Hayden, Kingfisher, Milet, Methuen, Tail, Southwater, Vision, Women's Press, Zoetic, Finch, Greater Glider
RANDOM HOUSE	Random House	Anchor Books, Andersen Press, Arrow, Ballantine, 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, Schoken, Secker & Warburg, Shambala, Sierra Arts, Tellastory, Three Rivers, Times Books, Vermillion, Villard Books, Vintage, Yellow Jersey Press
READING MATTERS	READ Educational Trust	Learning Matters Africa, Sunshine, Wendy Pye, Scholastic USA, Scholastic UK, Scholastic Australia, Scholastic Canada, Franklin Watts/Children's Press, Mary Glasgow Magazines, Usborne Publishing
SHUTER & SHOOTER PUBLISHERS	Shuter & Shooter	None
SOLO COLLECTIVE	Solo Collective	None
TROUPANT PUBLISHERS	Troupant, Rollerbird Press	None
WILD DOG PRESS	Wild Dog Press	Allen & Unwin, Chrysalis Childrens, Bradt, Horus, Murdoch, Merehurst, Ryland Peters & Small, Kylie Cathie, Top That, Urborne, McRae, Rebo, R&R Publications, Hardie Grant, Michael O'Mara
WITS UNIVERSITY PRESS	Wits University Press	None
Y PRESS	Y Press	None
ZACHEN PUBLISHERS	Zachen	None

2.2 DATA CAPTURING

The data collected from the 32 Questionnaires returned by local book publishing holding companies was captured in three Excel workbooks, each consisting of multiple spreadsheets. Several security measures ensure the confidentiality of the information, both in paper and electronic format. Copies of all correspondence were filed for future reference.

The 64 targeted book publishing holding companies were coded according to the turnover band structure (A–L) on which PASA membership fees are based. Since the completed Questionnaires received by 19 May 2004 included all the relevant book publishing companies listed by PASA as companies falling into the F, G, H, I, J, K, L bands it was decided to organise the data into two basic categories: LARGER PUBLISHERS/HOLDING COMPANIES (bands F–L that include companies with a turnover of more than R5m) and SMALLER PUBLISHERS/HOLDING COMPANIES (bands A–E that include companies with a turnover of less than R5m). The LARGER PUBLISHERS category comprises 17 companies and the SMALLER PUBLISHERS category comprises 47 companies (17+47=64).

Of the 32 Questionnaires received 17 were completed by holding companies in the LARGER PUBLISHERS category. Since these 17 companies include **all** the relevant members listed in PASA's F–L bands, the analysis of data for this category is 100% representative of the PASA profile.

Of the 32 Questionnaires received 15 (out of 47) were completed by holding companies in the SMALLER PUBLISHERS category. The Questionnaire was not completed by 32 (out of 47) other relevant PASA member holding companies in the A–E bands. The analysis of the data received from the 15 smaller companies therefore cannot be regarded as representative of the PASA profile, since they only represent approximately one third of the target group in this category. Accumulative maximum potential turnover based on the PASA turnover bands for these 32 outstanding Questionnaires in bands A–E (plus 2 smaller publishers that did not provide turnover figures in their Questionnaires) is estimated at R42,216,000.00, based on the maximum potential turnover of each specific publisher according to its membership category.

The total net turnover as per all 32 received Questionnaires (minus the 2 smaller publishers which did not provide turnover figures) is R1,392,874,286.33 (Rx). If the estimated amount for the 32 outstanding Questionnaires (plus the 2 above-mentioned smaller publishers for which estimated turnover figures were included) is added to this, the estimated total net turnover for all 64 companies would be R1,435,090,286.33 (Ry). The analysis below based on the actual figure(s) in the Questionnaires therefore constitutes $Rx/Ry \times 100 = 97\%$ of the total net turnover for all 64 companies. Even though the profile is not 100% correct, the profile is based on 97% of the total, which gives a very clear indication of the industry profile.¹

All entities on the PASA membership list, as well as the original survey list can be accounted for. The **151** PASA members can be sub-divided into **34** companies that have participated in the survey (representing **55** members) + **32** members that are book publishers but did not participate in the survey + **64** other PASA members who either declined to participate; were no longer members; or are associate members whose core business is not local book publishing ($55+32+64=151$). The original survey list of **117** members can be sub-divided into **34** companies that have participated in the survey (representing **55** members) + **32** members that are book publishers but did not participate in the survey + **30** other PASA members who either: Declined to participate; were no longer members; or are associate members whose core business is not local book publishing ($55+32+30=117$).

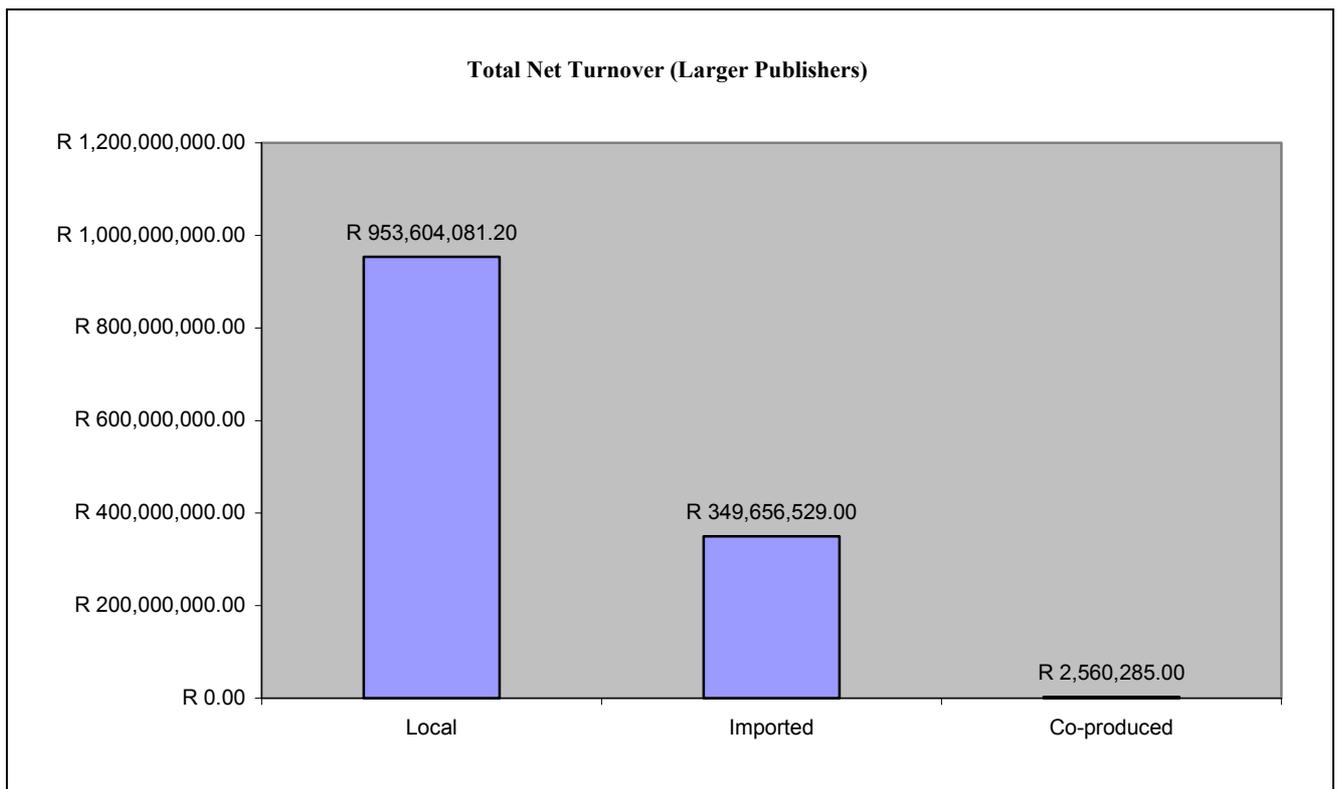
¹ Readers wanting to approximate the totals of 97% to 100% for all 64 publishers given in the tables and diagrams in 2.3 below, could simply multiply the numbers by 1.031 (when N is respectively 17 and 15; in other cases another multiplication number would apply). This has not been done in this report, because it would result in an approximation. It was decided to rather give a 100% accurate profile for of the LARGER PUBLISHERS category and a 100% accurate profile for approximately one third of the SMALLER PUBLISHERS category. Readers that would like to approximate the total industry profile can easily do so by adding for the numbers for the LARGER PUBLISHERS and SMALLER PUBLISHERS in a specific diagram/table, and multiplying this by 1.031 (etc.). Please note, however, that this would remain an approximation.

2.3 DATA ANALYSIS

Data from the 32 received Questionnaires were analysed in order to construct five generic profiles of the South African book publishing industry: Turnover; production; author; royalty; and employment. Several security and quality control measures ensured the confidentiality and integrity of the information transfer process. The analysis, however, rests on the assumed accuracy of the data received from the individual participating publishers.

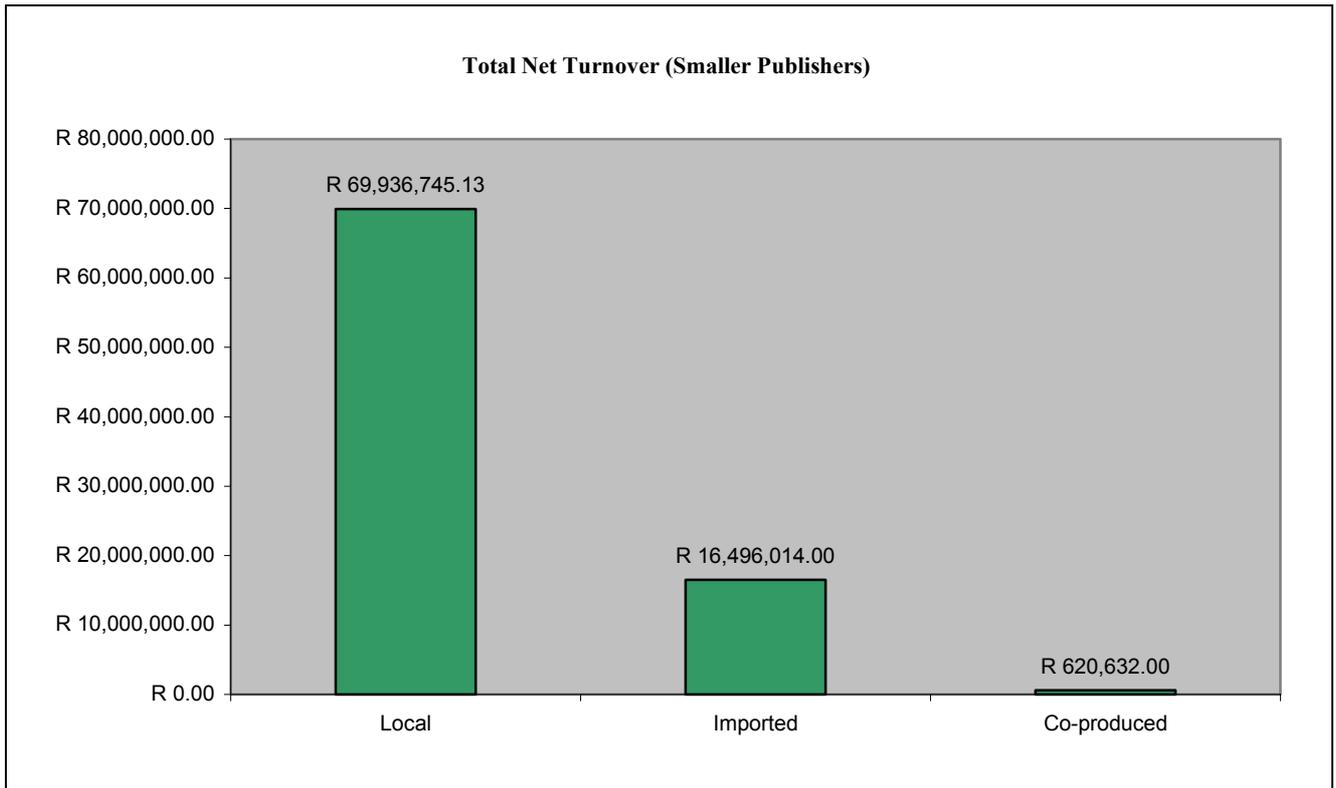
2.3.1 Question 1 (Turnover Profile)

What were the total GROSS turnover (including VAT and discount) and the NET turnover (excluding VAT and discount) for book sales into the South African market of your company from 1 January 2002 to 31 December 2002?



Notes

- These figures represent feedback from 17/17 larger publishers.
- Total gross turnover cannot be provided because only 12/17 publishers provided data.
- **Total net turnover** of all participating larger publishers: **R1,305,820,895.20**.

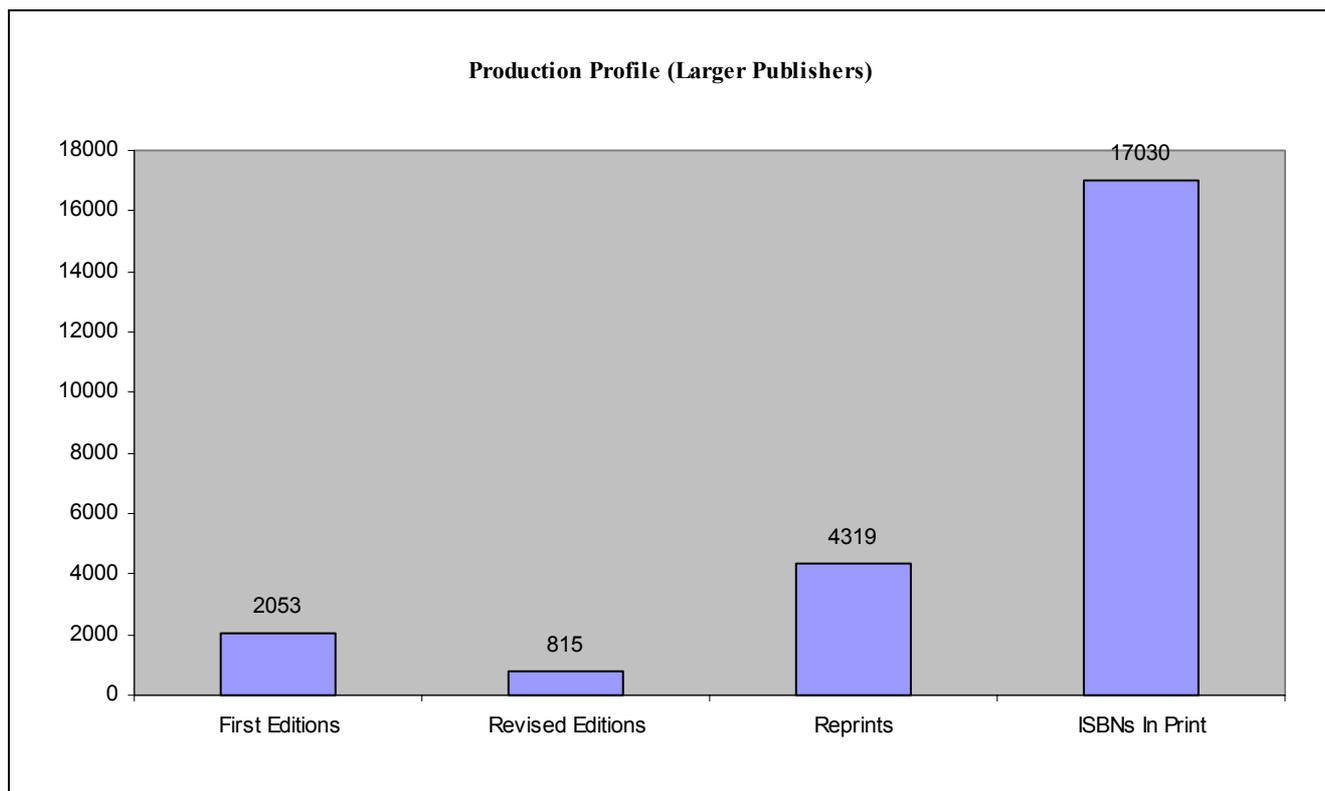


Notes

- These figures represent feedback from 13/15 participating smaller publishers, but they are not representative of the total SMALLER PUBLISHERS profile of 47 publishers.
- **Total net turnover** of 13 participating smaller publishers: **R87,053,391.13**.
- **Combined total net turnover** of the participating larger and smaller publishers: **R1,392,874,286.33**.
- **Estimated total net turnover** of all 64 publishers (see page 3): **R1,435,090,286.33**.

2.3.2 Question 2 (Production Profile)

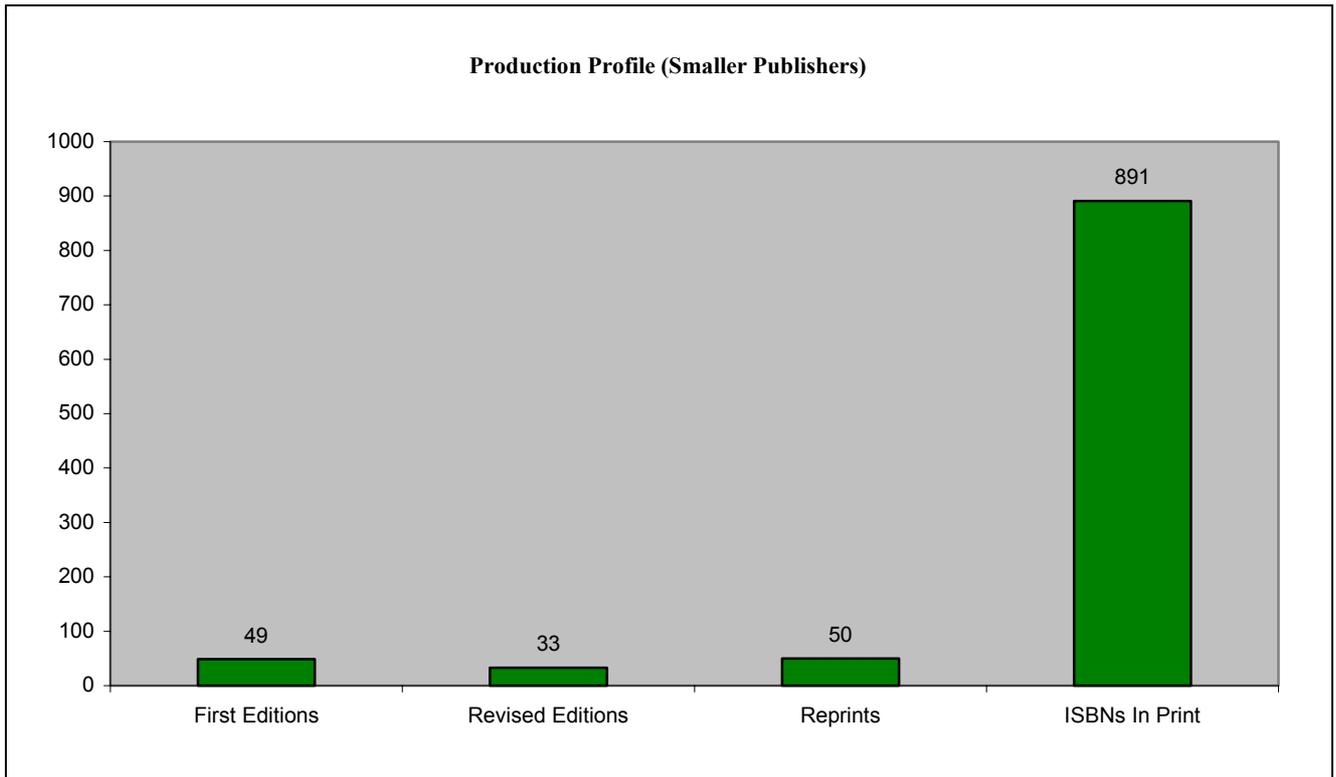
- (a) How many **new ISBNs** (new titles, including co-productions) for the South African market did your company produce between 1 January 2002 and 31 December 2002?
- (b) How many ISBNs did your company **reprint** for the South African market between 1 January 2002 and 31 December 2002?
- (c) How many ISBNs for the South African market did your company have **in print** during the period 1 January 2002 and 31 December 2002?



Notes

- These figures represent feedback from 17/17 larger publishers.
- **Total number of titles** (first editions + revised editions + reprints) published by 17 larger publishers during 2002: **7,187**.
- **ISBNs in print** as provided by the larger publishers: **17,030**.

This figure refers to local titles in print for the South African market; it does not refer to titles available and accessible internationally.



Notes

- These figures represent feedback from 15/15 participating smaller publishers, but they are not representative of the total SMALLER PUBLISHER profile of 47 companies.
- **Total number of titles** (first editions + revised editions + reprints) **published** by 15 smaller publishers during 2002: **132**.
- **ISBNs in print** as provided by 15 smaller publishers: **891**.

This figure refers to local titles in print for the South African market; it does not refer to international titles available and accessible.

- **Combined total number of titles** (first editions + revised editions + reprints) **published** by the participating larger and smaller publishers during 2002: **7,319**.
- **Combined total ISBNs in print** as provided by the participating larger and smaller publishers: **17,921**.

2.3.3 Question 3 (Author Profile)

To how many authors (including estates, etc.) of titles in print for the South African market did your company pay royalties between 1 January 2002 and 31 December 2002?

LARGER PUBLISHERS

Data in the correct format was provided by 17/17 participating publishers. The **total number of authors and/or other parties** to whom Royalties were paid during 2002 is **8,129**.

SMALLER PUBLISHERS

Data in the correct format was provided by 14/15 participating publishers and is not representative of the SMALLER PUBLISHERS profile of 47 publishers. The total number of authors and/or other parties to whom royalties were paid during 2002 is **180**.

The **combined total number of authors and/or other parties** to whom the participating larger and smaller publishers paid royalties during 2002 is **8,309**.

2.3.4 Question 4 (Royalty Profile)

What was the average royalty paid out to authors (including estates, etc.) expressed as a percentage of the turnover figure(s) provided in Question 1, for the South African market of your company (all imprints included) from 1 January 2002 to 31 December 2002?

LARGER PUBLISHERS

Data was provided by 17/17 participating publishers. The **average % royalty** in terms of **total net turnover** paid out to authors and/or third parties during 2002 is **7,99%**. Please note that this figure does not reflect the average percentage royalty per individual publisher or per individual author.

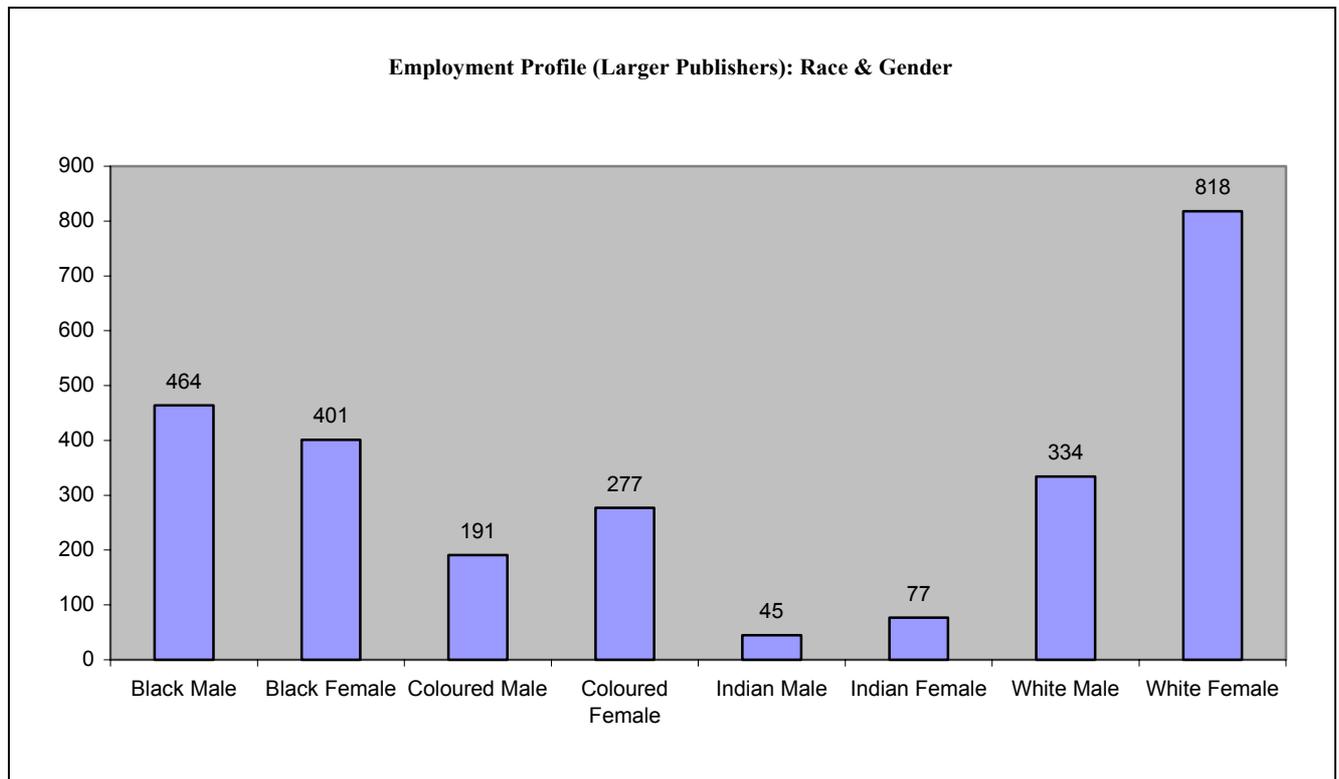
SMALLER PUBLISHERS

Data was provided by 8/15 participating publishers and is not representative of the **SMALLER PUBLISHERS** profile of 47 publishers. Three (of 15) smaller publishers provided data that could not be used. The **average % royalty** in terms of **total net turnover** paid out to authors and/or third parties during 2002 is **7,13%**. Please note that this figure does not reflect the average percentage royalty per individual publisher or per individual author.

2.3.5 Question 5 (Employment Profile)

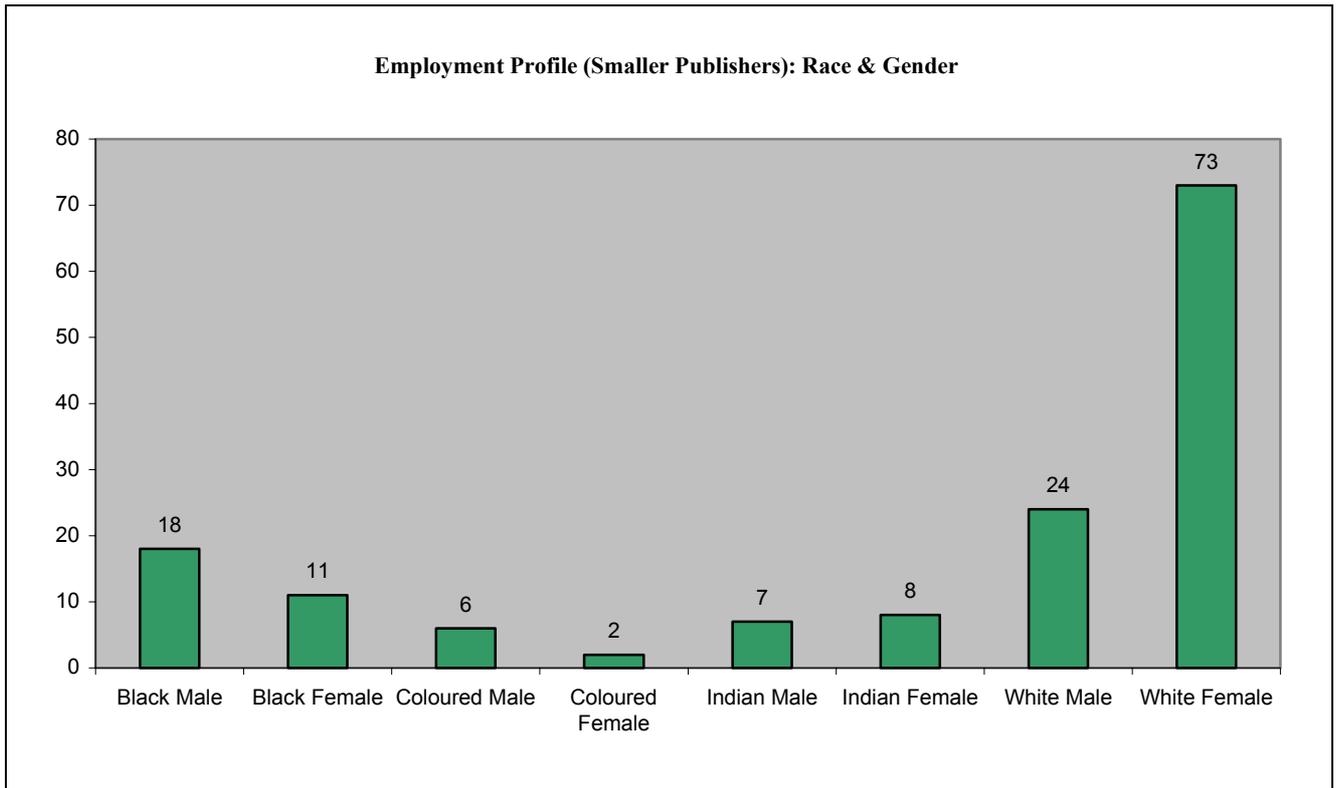
(a) How many permanent employees were on your company's payroll during your 2002/2003 financial year?

(b) How many temporary and/or freelance staff did your company employ during your 2002/2003 financial year? Provide information on the number of **permanent (P)**, **temporary (T)** or **freelance (F)** staff according to the following breakdown: Race; gender; and job category.



Notes

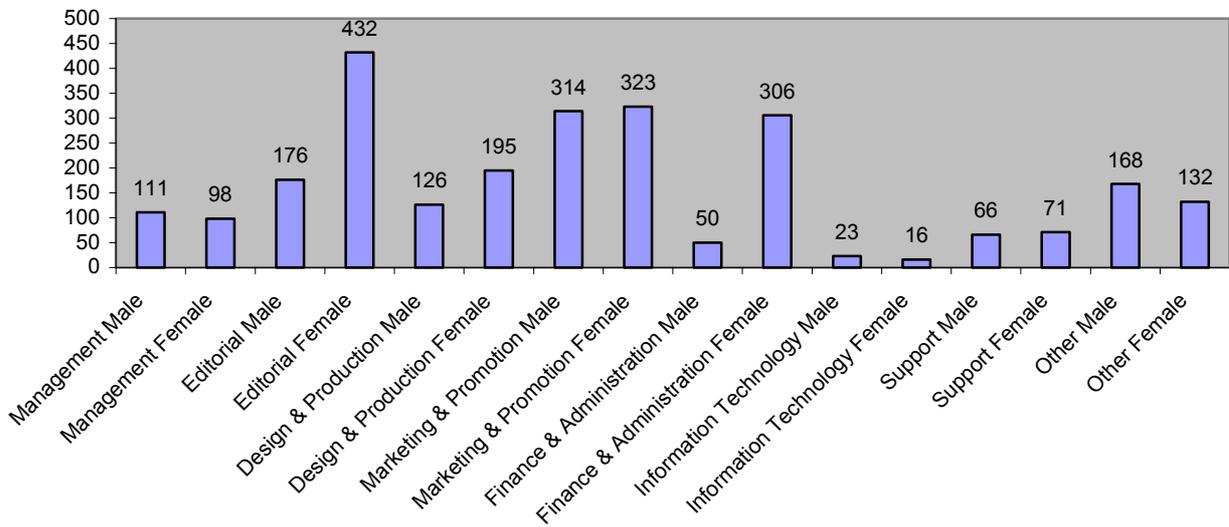
- These figures represent feedback from 17/17 larger publishers.
- The figures include permanent, temporary and freelance employees.
- In one case a company could not provide the required breakdown for freelancers (258). This number is not reflected in the diagrams, but should be added when the total number of employees is calculated.
- **Total number of employees** of all participating larger publishers (2607 + 258): **2,865**.



Notes

- These figures represent feedback from 15/15 participating smaller publishers, but they are not representative of the total SMALLER PUBLISHERS profile of 47 publishers.
- The figures include permanent, temporary and freelance employees.
- **Total number of employees** of 15 participating smaller publishers: **149**.
- **Combined total number of employees** of the participating larger and smaller publishers (2,865 + 149): **3,014**.

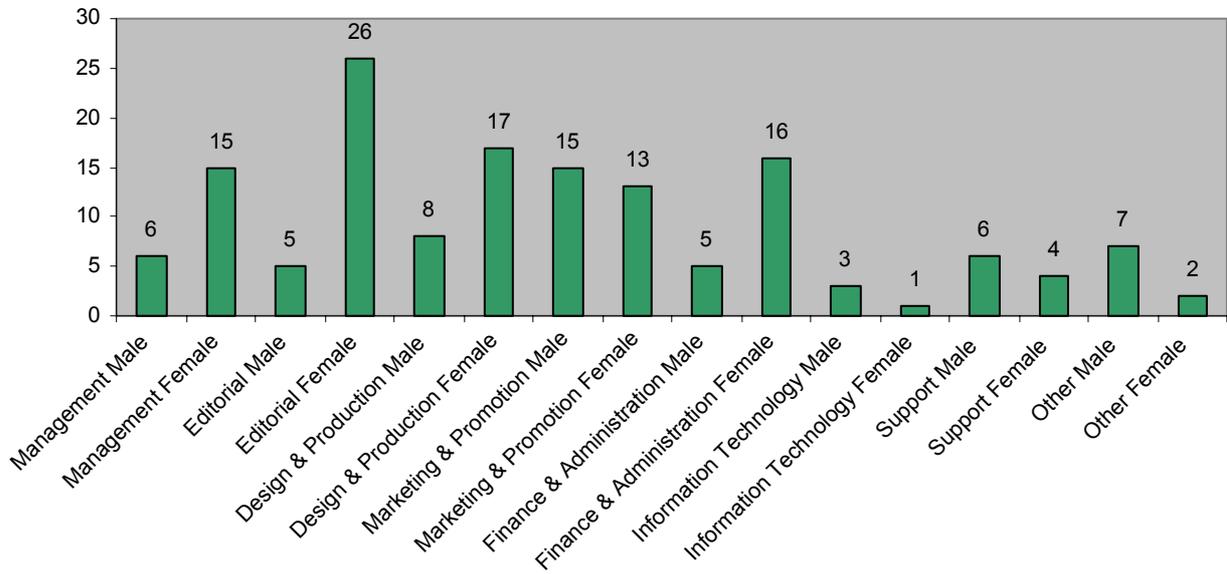
Employment Profile (Larger Publishers): Job Categories & Gender



Notes

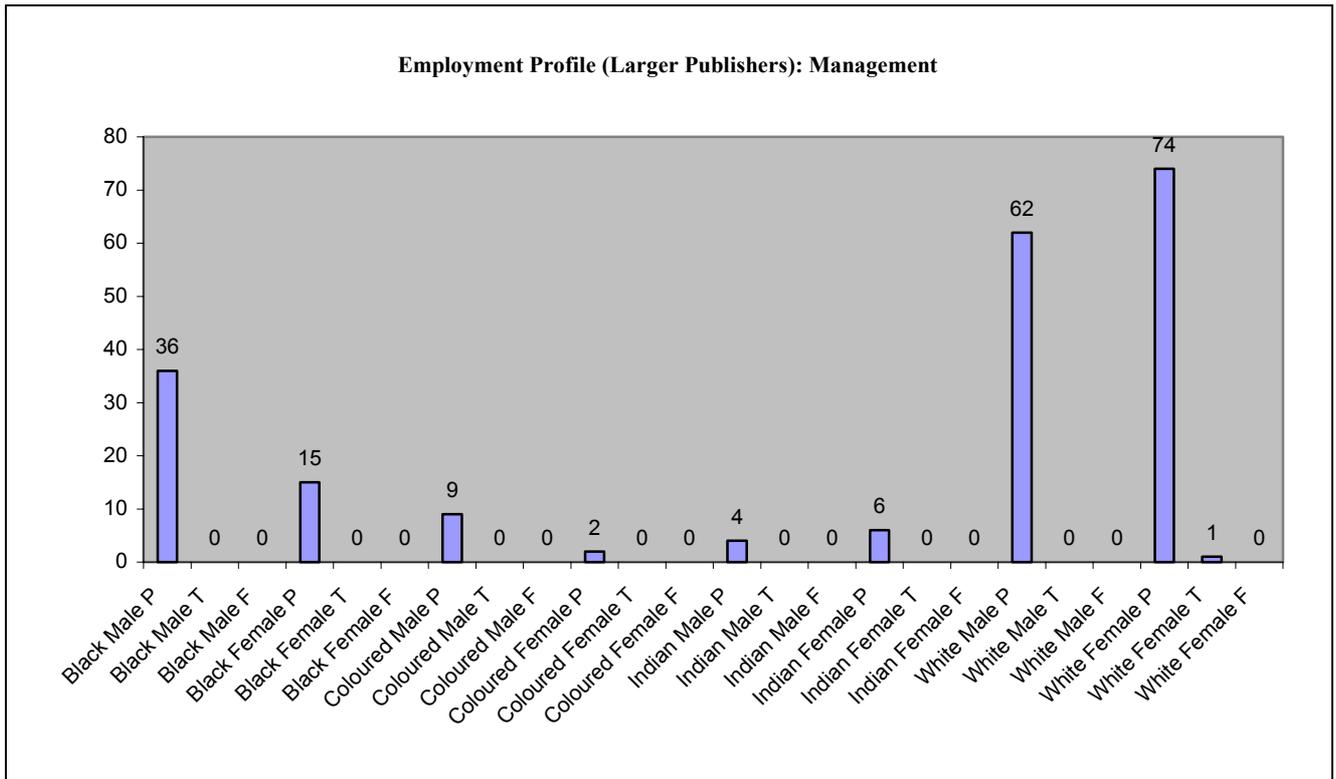
- These figures represent feedback from 17/17 larger publishers.
- The figures include permanent, temporary and freelance employees.
- **Total number of employees** of all participating larger publishers (2607 + 258 freelancers that could not be reflected in the diagram; see page 18): **2,865**.

Employment Profile (Smaller Publishers): Job Categories & Gender



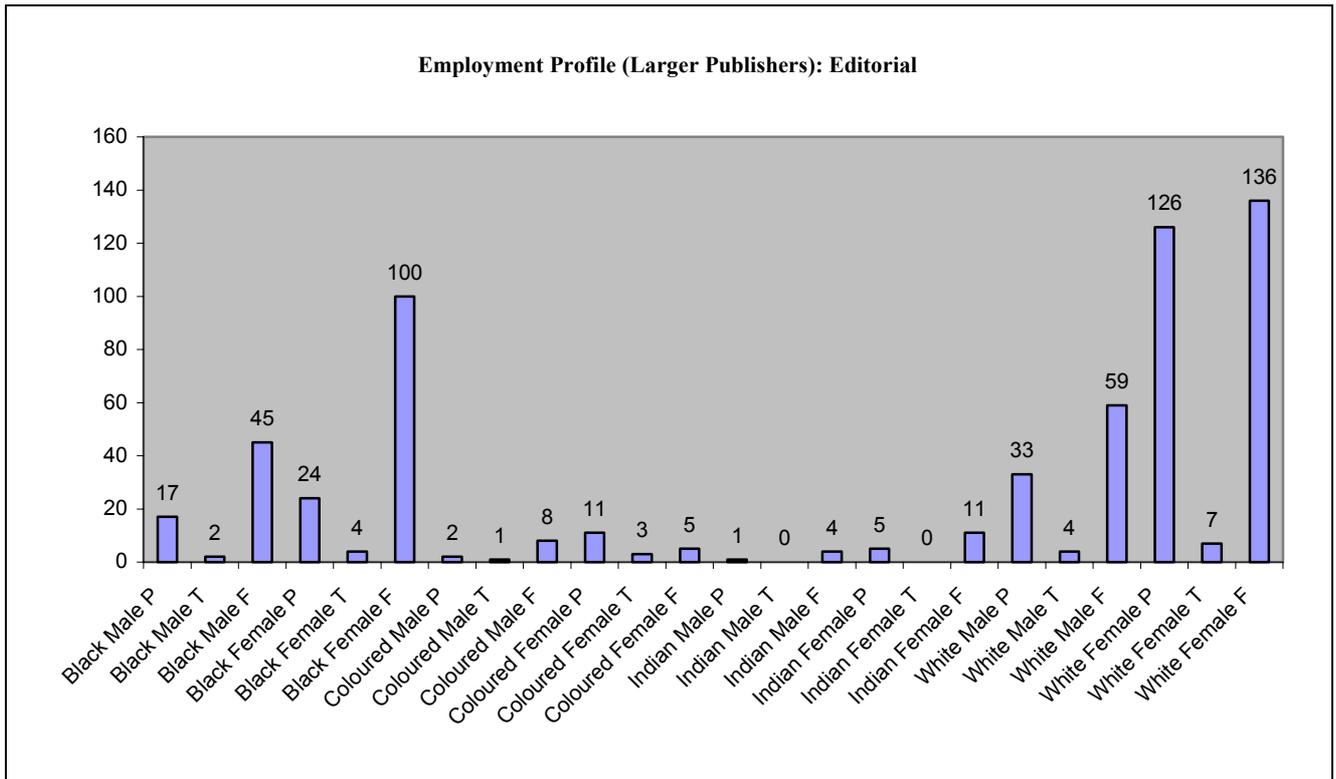
Notes

- These figures represent feedback from 15/15 participating smaller publishers, but they are not representative of the total SMALLER PUBLISHERS profile of 47 publishers.
- The figures include permanent, temporary and freelance employees.
- The numbers add up the **149** employees.
- **Combined total number of employees** of the participating larger and smaller publishers (2,865 + 149): **3,014**.



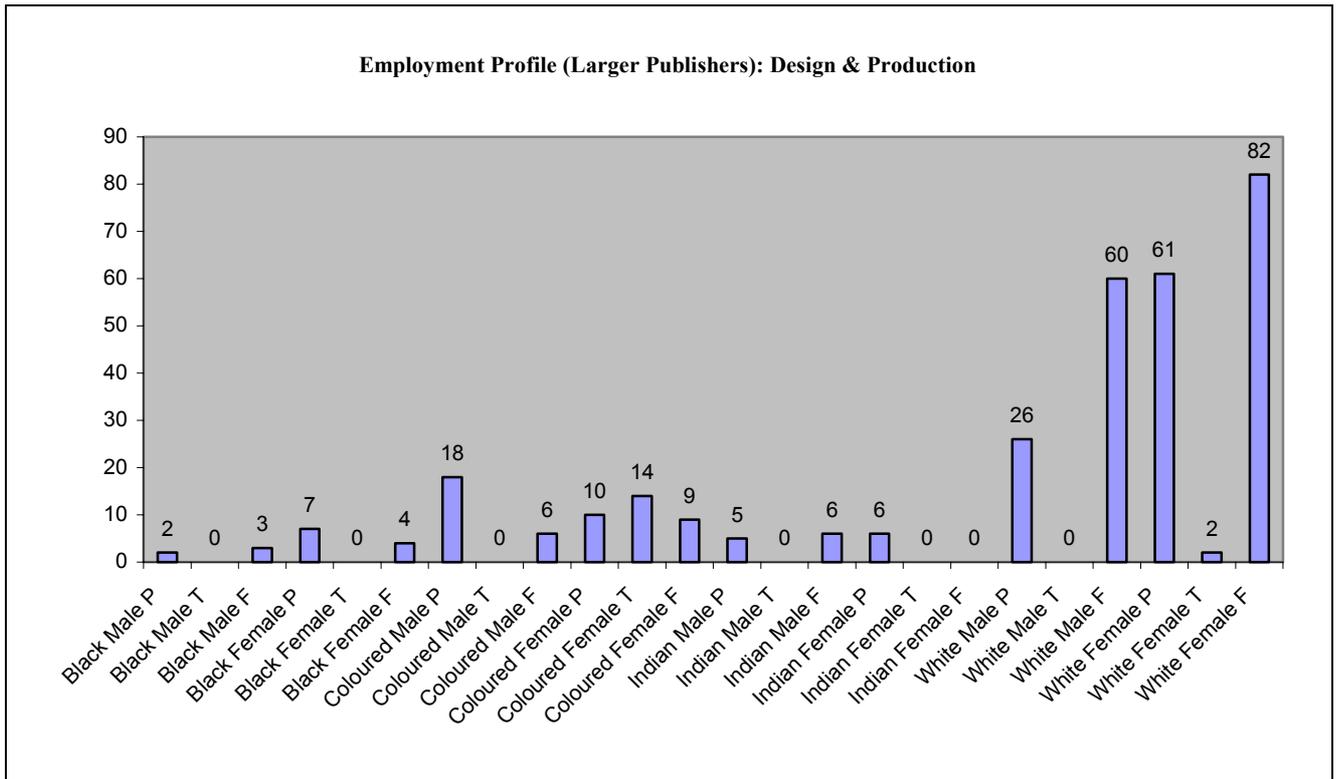
Notes

- These figures represent feedback from 17/17 larger publishers.
- **Number of employees in management of all participating larger publishers: 209.**
- Data was provided by 15/15 participating smaller publishers, but they are not representative of the total profile of 47 smaller publishers. No graph is provided for these figures.
- **Number of employees in management of 15 participating smaller publishers: 21.**
 - Coloured Male P – 1
 - White Male P – 5
 - White Female P – 13
 - White Female T – 1
 - White Female F – 1



Notes

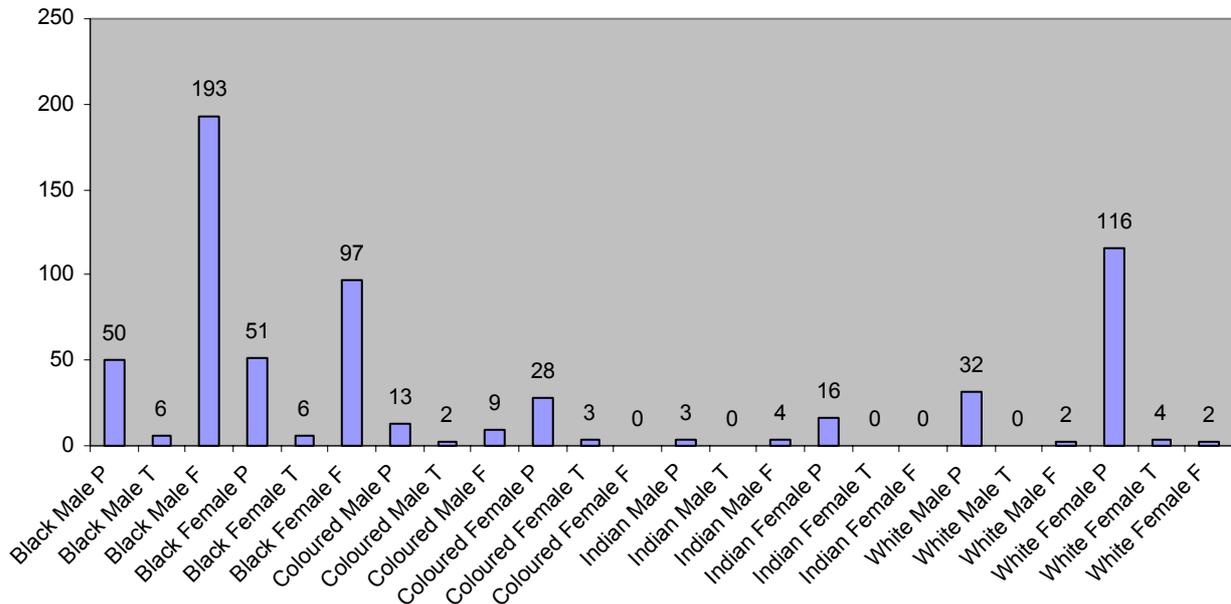
- These figures represent feedback from 17/17 larger publishers.
- **Number of employees in editorial of all participating larger publishers: 608.**
- Data was provided by 15/15 participating smaller publishers, but they are not representative of the total profile of 47 smaller publishers. No graph is provided for these figures.
- **Number of employees in editorial of 15 participating smaller publishers: 31.**
 - Black Male T – 3
 - Black Female P – 1
 - Black Female T – 1
 - Coloured Female F – 1
 - Indian Female P – 2
 - White Male P – 1
 - White Male T – 1
 - White Female P – 3
 - White Female T – 3
 - White Female F – 15



Notes

- These figures represent feedback from 17/17 larger publishers.
- **Number of employees in design & production of all participating larger publishers: 321.**
- Data was provided by 15/15 participating smaller publishers, but they are not representative of the total profile of 47 smaller publishers. No graph is provided for these figures.
- **Number of employees in design & production of 15 participating smaller publishers: 25.**
 - Black Male P – 1
 - Black Female F – 1
 - Indian Male T – 1
 - Indian Male F – 1
 - Indian Female P – 1
 - Indian Female T – 2
 - Indian Female F – 2
 - White Male P – 2
 - White Male F – 3
 - White Female P – 3
 - White Female F – 8

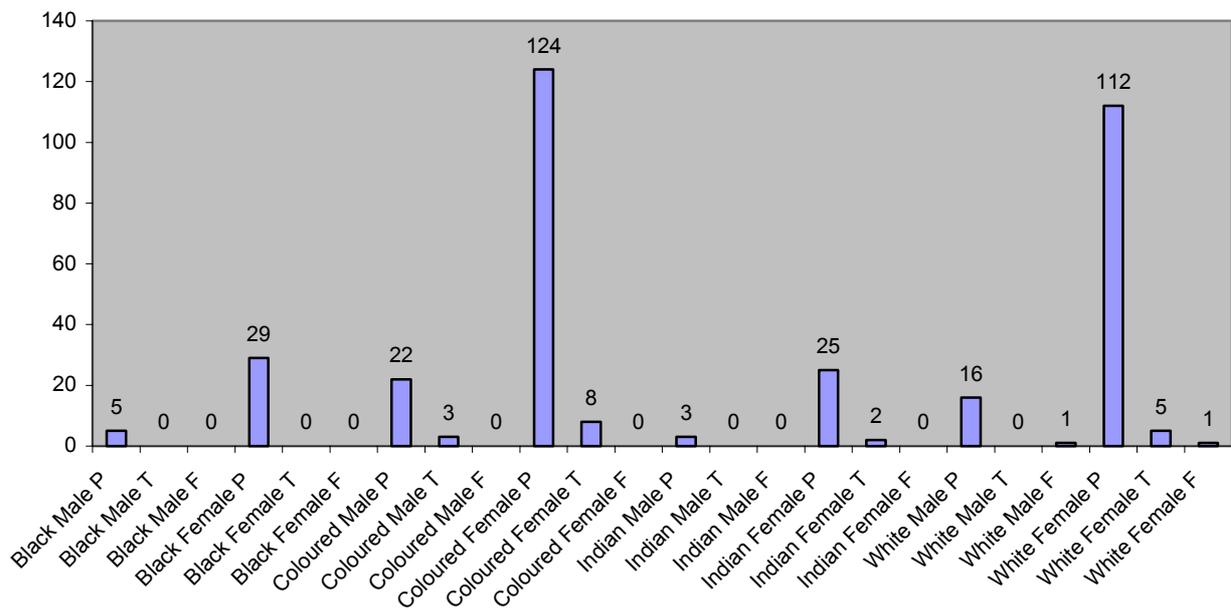
Employment Profile (Larger Publishers): Marketing & Promotion



Notes

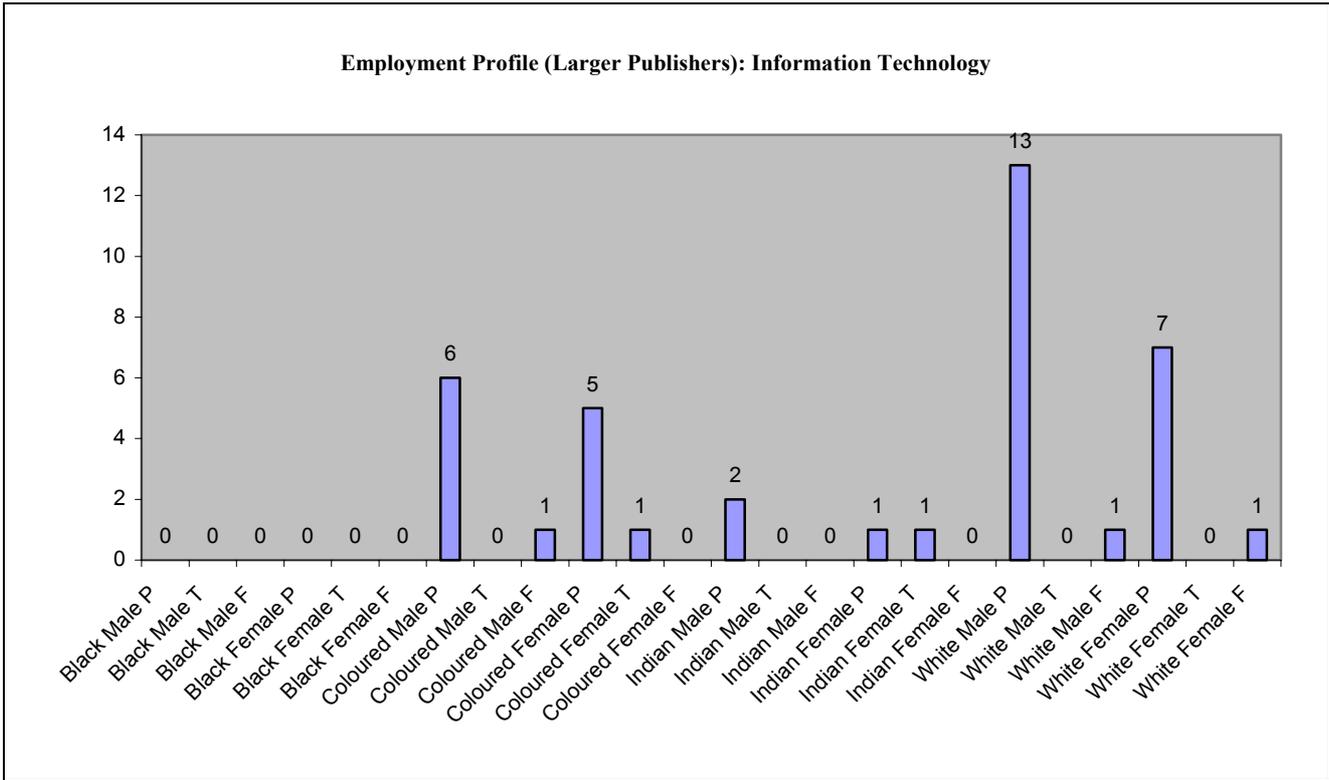
- These figures represent feedback from 17/17 larger publishers.
- **Number of employees in marketing & promotion (including sales) of all participating larger publishers: 637.**
- Data was provided by 15/15 participating smaller publishers, but they are not representative of the total profile of 47 smaller publishers. No graph is provided for these figures.
- **Number of employees in marketing & promotion (including sales) of 15 participating smaller publishers: 28.**
 - Black Male T – 7
 - Black Female T – 2
 - Coloured Male P – 1
 - Coloured Male F – 1
 - Indian Male T – 2
 - White Male P – 3
 - White Male F – 1
 - White Female P – 7
 - White Female T – 1
 - White Female F – 3

Employment Profile (Larger Publishers): Finance & Administration



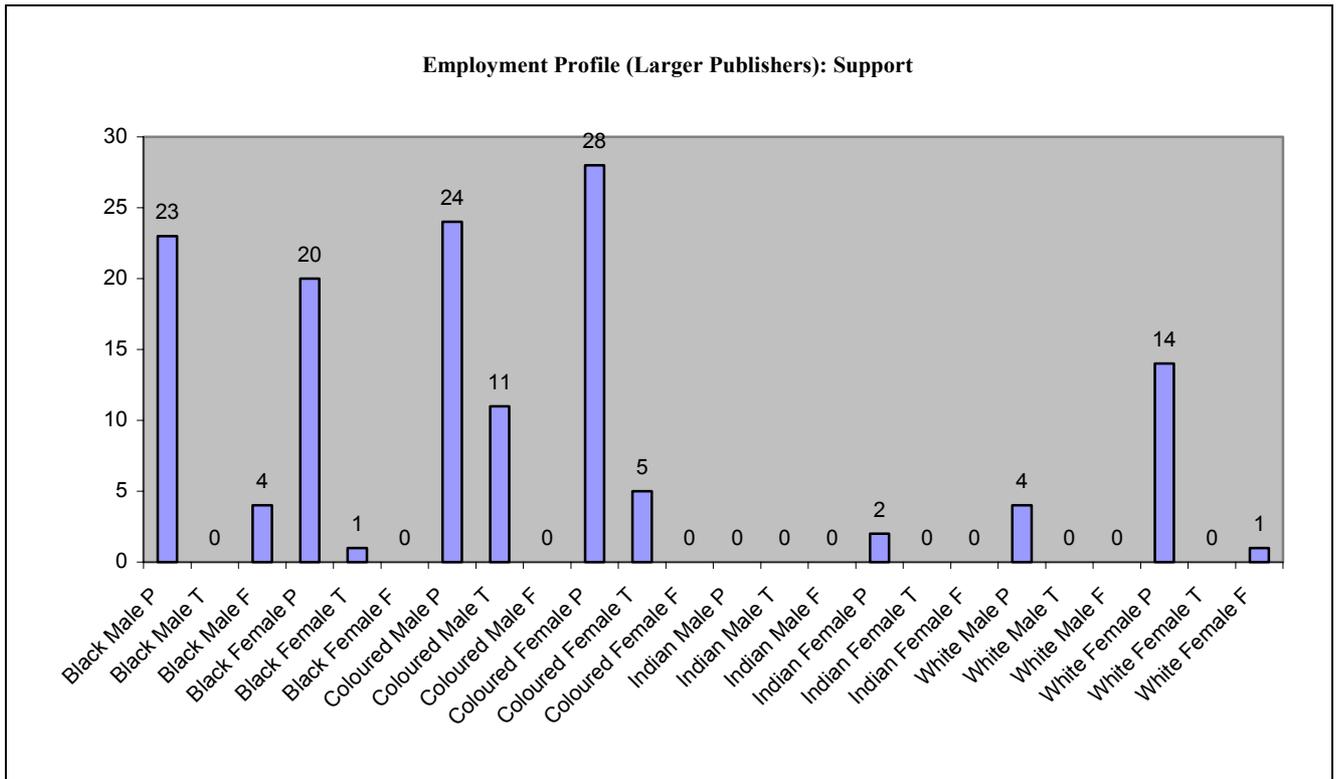
Notes

- These figures represent feedback from 17/17 larger publishers.
- **Number of employees in finance & administration** of all participating **larger publishers: 356.**
- Data was provided by 15/15 participating smaller publishers, but they are not representative of the total profile of 47 smaller publishers. No graph is provided for these figures.
- **Number of employees in finance & administration** of 15 participating **smaller publishers: 21.**
 - Black Female P – 1
 - Black Female F – 1
 - Indian Male P – 2
 - Indian Male F – 1
 - Indian Female P – 1
 - White Male P – 1
 - White Male F – 1
 - White Female P – 9
 - White Female F – 4



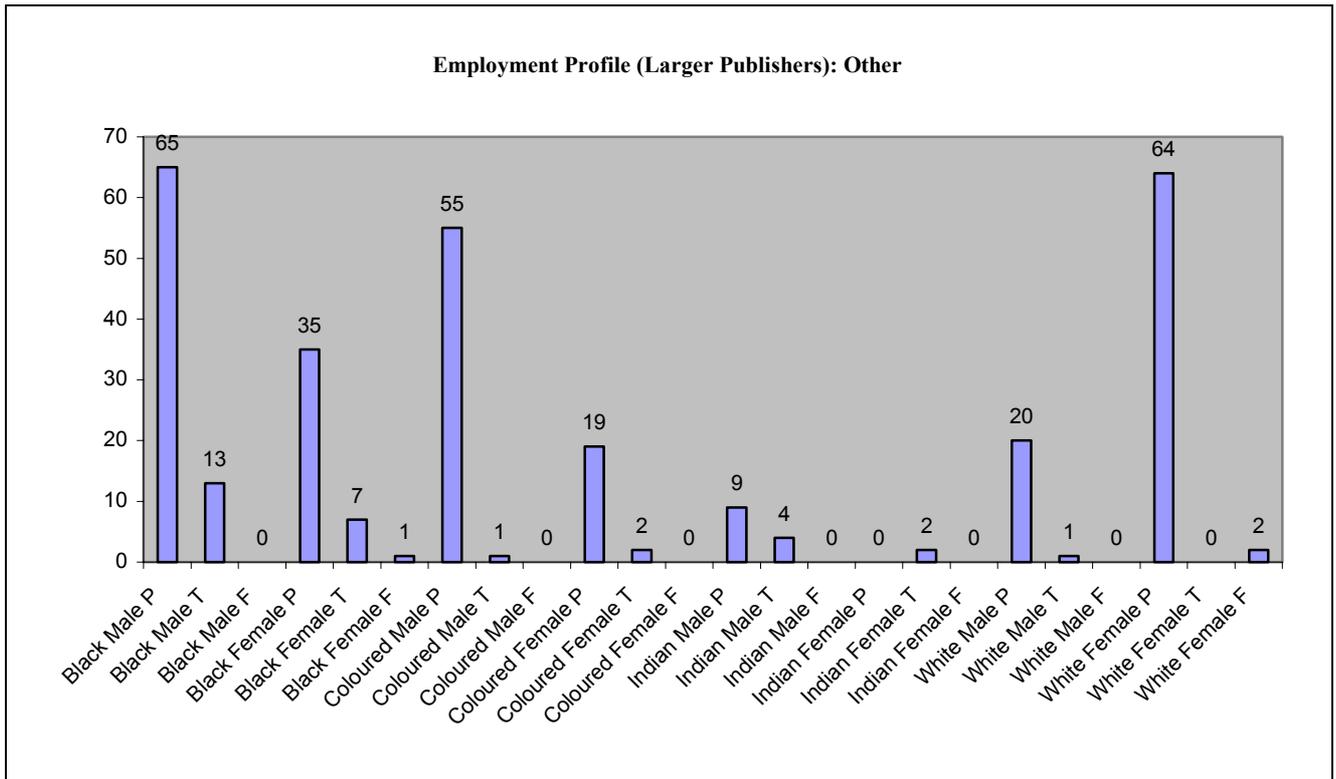
Notes

- These figures represent feedback from 17/17 larger publishers.
- **Number of employees in information technology of all participating larger publishers: 39.**
- Data was provided by 15/15 participating smaller publishers, but they are not representative of the total profile of 47 smaller publishers. No graph is provided for these figures.
- **Number of employees in information technology of 15 participating smaller publishers: 4.**
 - White Male P – 1
 - White Male F – 2
 - White Female – 1



Notes

- These figures represent feedback from 17/17 larger publishers.
- Examples of “Support functions” as indicated on Questionnaires include: Warehousing (receiving & dispatch); tea lady; postal clerk/messenger.
- **Number of employees in support of all participating larger publishers: 137.**
- Data was provided by 15/15 participating smaller publishers, but they are not representative of the total profile of 47 smaller publishers. No graph is provided for these figures.
- **Number of employees in support of 15 participating smaller publishers: 10.**
 - Black Male P – 1
 - Black Female P – 3
 - Black Female T – 1
 - Coloured Male P – 2
 - White Male P – 1
 - White Male T – 1
 - White Male F – 1



Notes

- These figures represent feedback from 17/17 larger publishers.
- Examples of “Other job categories” as indicated on Questionnaires are: Distribution, Facilitation, Customer Services.
- **Number of employees in other job categories of all participating larger publishers: 300.**
- Data was provided by 15/15 participating smaller publishers, but they are not representative of the total profile of 47 smaller publishers. No graph is provided for these figures.
- **Number of employees in other job categories of 15 participating smaller publishers: 9.**
 - Black Male T – 6
 - Coloured Male P – 1
 - Coloured Female P – 1
 - White Female F – 1

3. SABA SNAPSHOT INDUSTRY SURVEY 2002

SABA supplied an address list with the names and contact details of **130** CEOs/MDs of book selling holding companies and 68 e-mail addresses were included in this list.

The Questionnaire was designed in consultation with the members of the SABA Exco. Participants in the survey had to provide information about the **name of the holding company**; the holding company's **core business** (according to the three categories of books sales of books bought locally; book sales of books imported; other); and the **number of retail outlets**. The two survey Questions focused on the holding company's **turnover profile** and **employment profile** in South Africa. The CEO/MD of the company was requested to include accumulated and consolidated information pertaining to all the retail outlets of the company. Exact (or as accurate as possible approximations of) figures and numbers were requested.

The Questionnaire, as well as a covering letter from the SABA Exco that contextualised the *Snapshot Industry Survey 2002*, were posted to the address list on **9 December 2003**. It was stipulated that the completed Questionnaire should be returned to a dedicated e-mail address or by registered post to the postal address of the project leaders by the cut-off date of **23 January 2004**.

Reminders of the *Snapshot Industry Survey 2002* (including the covering letter and Questionnaire) were posted to a selection of **50** holding companies on **19 February 2004**. These members were selected on the basis of the company name, the available information on the nature of their core business, geographical location and available correct contact details. These holding companies were subsequently personally contacted either via e-mail, fax or phone calls during the period **8 March and 14 April 2004**.

Interim progress reports were tabled as part of the interim PASA reports on **16 February 2004, 30 March 2004** and **15 April 2004**. On 15 April 2004 the third interim *Progress Report: PASA/SABA Snapshot Industry Survey 2002* was tabled in Cape Town during a meeting with Hanri Pieterse, who is the PASA Exco representative for this research project, Dudley Schroeder, the recently appointed executive director of PASA, and Frikkie Nel, the designated office head of SABA. By that date the

following **30** completed Questionnaires had been received from holding companies, representing **130** outlets.

ABC Bookshop
Adams & Co (including Shuter & Shooter and Medibooks)
Addis Stationers
Afribooks
Best Books
Boland Skryfbehoeftes
Books etc.
Booktalk
Brainbooks
BT Boeke
Cascades Bookshop
Clarkes Bookshop
Cornea Boeke & Loskop Stationers
DENOSA
Essential Texts
Everybody's Books
Exclusive Books Head Office
Hargraves Library Services
Jakes Stationery
Kenart Platinum
Kirsten Skryfbehoeftes
JL Armstrong Booksellers
MG Redhi Booksellers
Minerva Books
Moratiwa Bookstore
Praesidium Books
Roopanand
The Complete Bookshop
Van Schaik Head Office
Wordsworth Head Office

During the meeting of **15 April 2004** it was decided to focus on those booksellers that are active in the trade and academic book sectors and who generate R1m or more turnover. After the meeting the SABA office head assisted in identifying and contacting specific relevant SABA members. Up to

the final cut-off date for the report, however, only 2 additional Questionnaires were received (from Lemur Books and Uhuru Books & Stationary).

Since many of the main role-players have not yet participated in the *Snapshot Industry Survey* it is currently not possible to provide a representative analysis of data concerning the South African bookselling industry. The data of individual members is currently being pursued in order to table the *Report: SABA Snapshot Industry Survey 2002* on **12 July 2004**.

4. CONCLUSION

The following conclusions can be drawn:

- Notwithstanding the fact that the report does not contain data from all 64 holding companies/publishers that are members of PASA or affiliated with PASA, feedback from the 17 largest companies (from the PASA F–L bands) included in the report ensures that the report provides a representative perspective on the industry as a whole.
- Based on reported turnover of 32 companies and the estimated maximum turnover of the remaining 32 companies (based on their PASA membership bands) the actual numbers in this report (where complete) represent 97% of the total profile of all 64 companies.
- On the basis of a summary of the progress report presented to the PASA Genco on 28 April, the association has already indicated its confidence in the process and the usability of the data, and recommended that a follow-up *Snapshot Industry Survey* should be undertaken for the 2003 data. The existing Questionnaire will be refined (where required), and a number of additional elements will be added. It is envisaged that the Questionnaire will be distributed by July 2004. The Research Team trusts that all PASA members and affiliates will be convinced of the usefulness of the data, and will participate more extensively in this follow-up *Snapshot Industry Survey*.

F Galloway

TJD Bothma

LM Greyling

JUNE 2004