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BOOK RETAIL INDUSTRY SURVEY 2006 REPORT

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Historical background

In 2003 the members of the South African Booksellers Association (SABA) commissioned an exploratory industry survey of the local book retail industry to be conducted parallel to a similar survey conducted by the Publishers' Association of South Africa (PASA). For a number of reasons, the response to the SABA survey was poor and no representative report could be issued.

However, the importance of statistical information on the book retail industry was emphasised by numerous requests for such information from local and international book practitioners, from government and cultural organisations, and from international book industry associations.

At the end of 2006 the executive committee of SABA decided to conduct another survey of the local book retail industry for the calendar year 2006. It was decided to extend the scope of the survey to include all practising booksellers in the country, irrespective of their membership of any trade organisation.

The Department of Information Science at the University of Pretoria was contracted as an independent and non-profit research institute to undertake the survey by means of a standardised questionnaire addressed to the CEO of each enterprise.

Objective and scope of the survey

The objective of the survey was to provide a broad overview of the shape and the size of the local book retail industry for the calendar year 2006.

The book retail industry is divided into three sub-sectors: trade books, academic books and educational books.

For each of the three sub-sectors, data was collected on the total sales of each participant, across all product lines they sell. Only retailers for whom books were core to their business (more than 25% of total sales) were included in the survey, thus eliminating general supermarkets, curio shops, pharmacies and a number of other non-traditional book outlets from the target group.

Each participant was requested to provide annual net book turnover values, excluding VAT, for a number of customer categories, which included direct consumer sales (general public and academic students) and institutional sales (libraries, academic institutions, schools, state and para-statal institutions and NGOs and other to be specified). This information was based on the broad classification of customers in the booksellers' sales records.

Each participant was asked to provide, for each of the nine provinces, its number of shops, its total gross trading area and the contribution each province made to national book sales.

Supplier information was collected for each product category in terms of annual purchases at cost price in terms of books sourced from local publishers, from local distributors of imported books, by direct imports from overseas publishers or wholesalers, and from the local authors of self-published books.

Acknowledging that there will always be some degree of crossover sales between the different product categories, with, for example, some educational books sold through trade booksellers, annual book sales values based on title or supplier information was collected for each of the three main product categories.

Employment statistics collected included total staff remuneration, temporary staff remuneration, employment numbers per demographic parameters and demographic profiles per functional application of staff. Data on expenditure on training was also collected.

The last questions concerned the legal status of the enterprise, shareholding and BBBEE status.

Industry segmentation

Besides the standard segmentation into the three industry sub-sectors, viz. trade, academic and educational, a further distinction was made between different modes of retail. A distinction was made between general and religious trade booksellers, and between library supply specialists, internet booksellers and book clubs.

To ensure a representative sample of participants, a number of role-players in each bookseller category were identified as being absolutely essential to the survey (20), while a second category of booksellers was identified whose participation was highly desirable but not essential to the success of the survey (18). The core list therefore consisted of 38 role-players.

Data collection process

The SABA office made available their membership list in electronic format, with the e-mail addresses of nearly all members. The Christian Booksellers Association of South African (CBSA) office also agreed to participate and made their membership list available. A number of booksellers that were members of neither trade association were also identified and their contact details added to the list of bookshops who were invited to participate in the survey.

On 1 February 2007 a total number of 208 booksellers were contacted via e-mail or fax with a covering letter explaining the purpose of the survey, and the questionnaire attached. The first deadline for returns was set at 28 February 2007. By the first deadline, only three booksellers had responded. On 1 March a reminder was sent to all booksellers on the initial distribution list, extending the deadline to 28 March. By the second deadline, ten booksellers had responded.

On 29 March a third letter was sent to those booksellers deemed essential or highly desirable for the success of the survey, and the deadline extended to 18 April. By this time it had become clear that many enterprises had great difficulty in providing the requested data on employment numbers and profiles, and it was decided to eliminate these questions from the survey in order to increase the level of participation. The letter of 29 March was followed up by telephonic contact with the CEOs of booksellers with outstanding returns. A final cut-off date of 7 May was set.

By this final deadline, a total of 26 returns had been received, including all the essential participants and a number of the highly desirable participants. After consultation with the SABA office, it was decided to end the data collection process and start analysing the data received.

Assessment of the returns

A total of 26 returns were received. Two of these were too incomplete or inaccurate to be included in the survey. The 24 returns used in the survey were from the categories tabled below. In this table the first figure indicates the number of responses, the second the number of bookshops in the target list.

SUB-SECTOR	TYPE OF BOOKSELLER	ESSENTIAL PARTICIPANTS	HIGHLY DESIRABLE PARTICIPANTS
Trade	General chains	5/5	1/1
	Religious chains	3/3	0/0
	Book clubs	2/2	0/0
	Library suppliers	2/2	0/0
	Internet booksellers	0/0	0/2
	Single store outlets	0/0	1/5
Academic	National chains	6/6	0/0
	Single store outlets	0/0	2/2
Educational	Chains	2/2	0/0
	Single store outlets	0/0	0/8
TOTAL PER CATEGORY		20/20	4/18
TOTAL ALL CATEGORIES		24/38	

The only trade book category not represented in the survey is the internet booksellers. Most of the single store booksellers did not participate, as many did not have the necessary systems to capture the data requested.

Based on confidential information revealed to the research team by other role players, it is estimated that the results received through the survey represent more than 90% of trade book sales. Sales that are not included in the survey results pertain to internet sales, the single store independent booksellers' contributions, supermarket sales, the sales of other non-traditional outlets (e.g. game lodges, curio shops, nurseries, pharmacies, etc.), and corporations that buy books as corporate gifts for shareholders and visitors.

All major academic booksellers participated in the survey, and the results are deemed to be a true and balanced reflection of the state of this sector of the industry. The estimation is that the survey has captured more than 90% of the sale of academic books through the industry. The research team is aware of the direct selling of academic textbooks by publishers to adopting lecturers, bypassing the retail industry, but this practice falls outside the scope of this survey.

The response from the educational sub-sector was poor. Both the larger players and none of the smaller booksellers returned results that could be incorporated in the survey. The results obtained are therefore not deemed to represent this sector in a statistically justifiable way.

The following booksellers participated in the survey. They are listed in alphabetical order.

Adams & Co.	Fascination Books
Afribooks	Gospel Direct
Alibirops	Hargraves Library Supplies
Armstrongs	Horizon Library Supplies
Bargain Books	Impact Bookshop
Brain Books	Juta & Co.
BT Books	LAPA
Cascades Bookshop	Leserskring
C.N.A.	P.N.A.
CUM Books	Protea Boekhuis
DENOSA	Van Schaik
Exclusive Books	Wordsworth

Data capturing process

The data collected from the questionnaires returned were captured in Excel. Several security measures ensure the confidentiality of the information, both in paper and electronic format. Copies of all correspondence were filed for future reference.

In order to protect the confidentiality of the information supplied by individual participants, it was decided not to report separately on any sub-sector or retailer category if fewer than four participants reported within that group of retailers. Applying this rule means that all the results of the trade booksellers would be consolidated into one report for this sub-sector as a whole.

Booksellers were unable to distinguish between locally published books and imported books purchased from local distributors. For this reason these two categories were combined into the category “locally sourced books”, as opposed to directly imported books and those purchased from self-publishing authors. Actual purchase values are not provided, but the percentages of total purchases for each of these three supplier categories are supplied per industry sub-sector.

Some booksellers could not distinguish between sales to libraries and sales to other institutions. For this reason the reported sales values have been grouped together under the heading “libraries and institutions”.

Because some of the participants were franchisors with no access to employment data of individual shops, and other participants were part of large corporations employing staff over a range of product lines, no accurate data could be collected on employment profiles, remuneration values and expenditure on training in the book sector. For this reason no analysis was done on employment data.

A significant participant in the trade sector could not provide gross trading areas per province for books only. For this reason no further analyses could be done on the total areas of retail space allocated to book retail.

Data analysis

Data from the 24 questionnaires were analysed in order to construct a number of generic profiles of the South African trade and academic book retail industry.

Most of the booksellers reported significant sales volumes in more than one of the industry sub-sectors. The data collected by the questionnaire confirmed the significant degree of crossover sales, with trade booksellers selling educational books and academic booksellers selling trade books, etc.

For this reason the data have been analysed at two levels: first, at industry level where all sales and purchases have been analysed according to product category; and, second, a further level of analysis has been done per sub-sector, where booksellers have been grouped together in terms of the major focus of their business.

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.

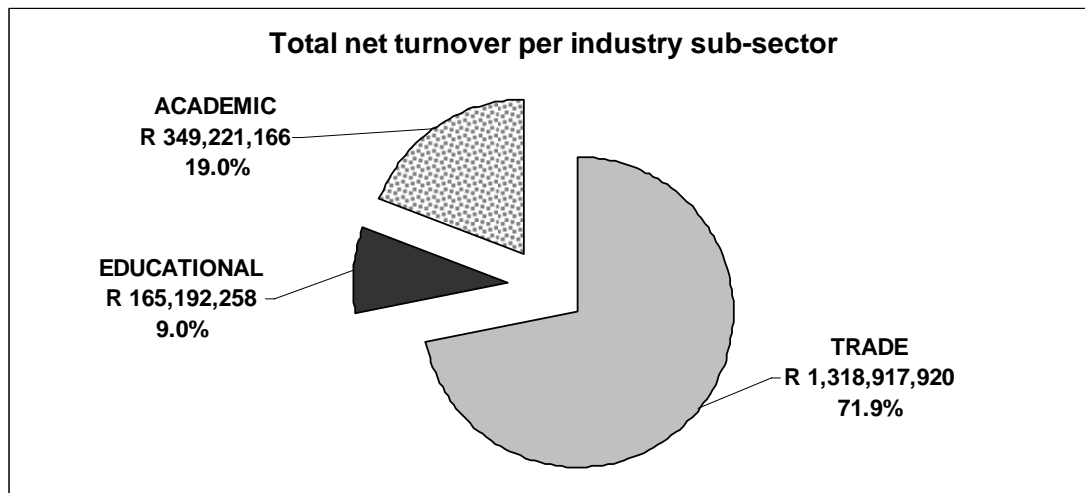
INDUSTRY TOTAL SURVEY RESULTS

Note: All sales values are net excluding VAT.

TOTAL INDUSTRY SALES PER SUB-SECTOR

Figure 1: Total net turnover per industry sub-sector

TRADE	R 1,318,917,920	71.9%
EDUCATIONAL	R 165,192,258	9.0%
ACADEMIC	R 349,221,166	19.0%
TOTAL	R 1,833,331,344	100%



Note:

- Those booksellers that participated in the survey were mainly from the trade sub-sector of the industry: 71.9% of all recorded sales were trade books, 19.0% academic books and 9% educational books.

Figure 2: Total net turnover of audio books and e-books

AUDIOBOOKS AND E-BOOKS	R 5,968,687	0.3%
BOOKS	R 1,827,362,657	99.7%
ALL BOOK RELATED PRODUCTS	R 1,833,331,344	100%

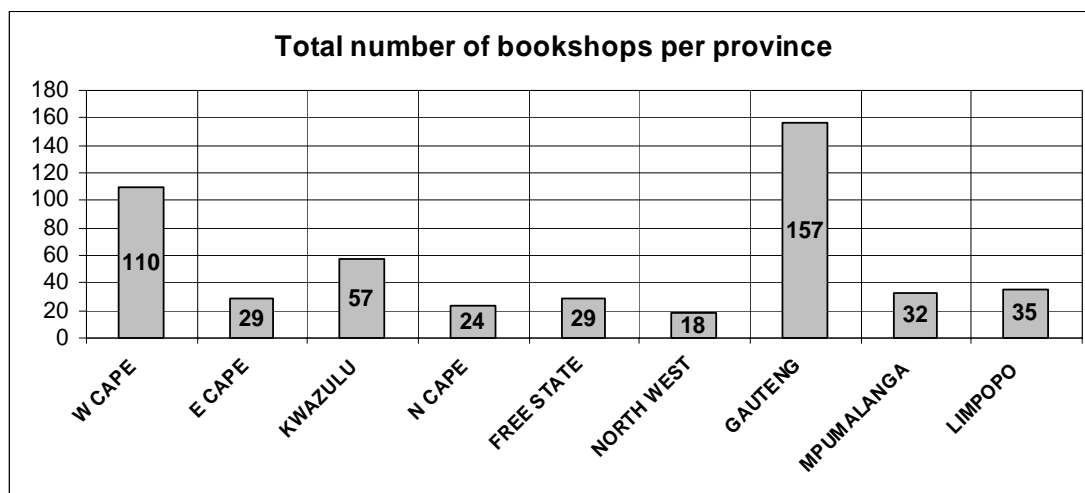
Note:

- Audio books and e-books made up only 0.3% of total recorded book product sales.

BOOK RETAILING INFRASTRUCTURE PER PROVINCE

Figure 3: Total number of bookshops per province

WESTERN CAPE	110
EASTERN CAPE	29
KWAZULU-NATAL	57
NORTHERN CAPE	24
FREE STATE	29
NORTH WEST	18
GAUTENG	157
MPUMALANGA	32
LIMPOPO	35
TOTAL	491



Notes:

- Between them, Gauteng and the Western Cape have more than half of all bookshops in the country (267 out of 491), followed by KwaZulu-Natal.
- The least developed book retailing provinces are North West province, the Northern Cape and the Eastern Cape.

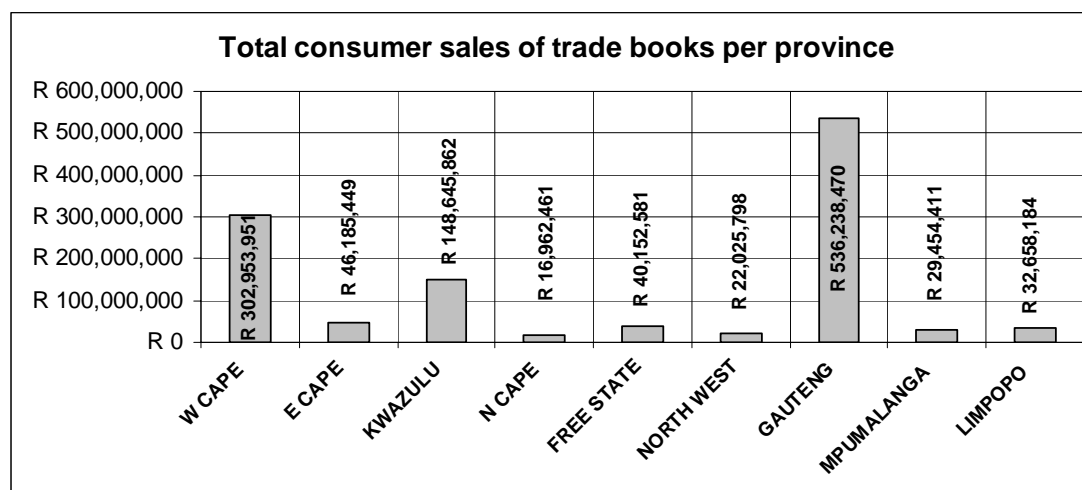
CONSUMER BOOK SALES PER SUB-SECTOR AND PROVINCE

Consumer sales exclude all institutional sales to schools, libraries, etc.

TRADE BOOKS

Figure 4: Total consumer sales of trade books per province

PROVINCE	SALES	%
WESTERN CAPE	R 302,953,951	25.8%
EASTERN CAPE	R 46,185,449	3.9%
KWAZULU-NATAL	R 148,645,862	12.6%
NORTHERN CAPE	R 16,962,461	1.4%
FREE STATE	R 40,152,581	3.4%
NORTH WEST	R 22,025,798	1.9%
GAUTENG	R 536,238,470	45.6%
MPUMALANGA	R 29,454,411	2.5%
LIMPOPO	R 32,658,184	2.8%
TOTAL	R 1,175,277,167	100%



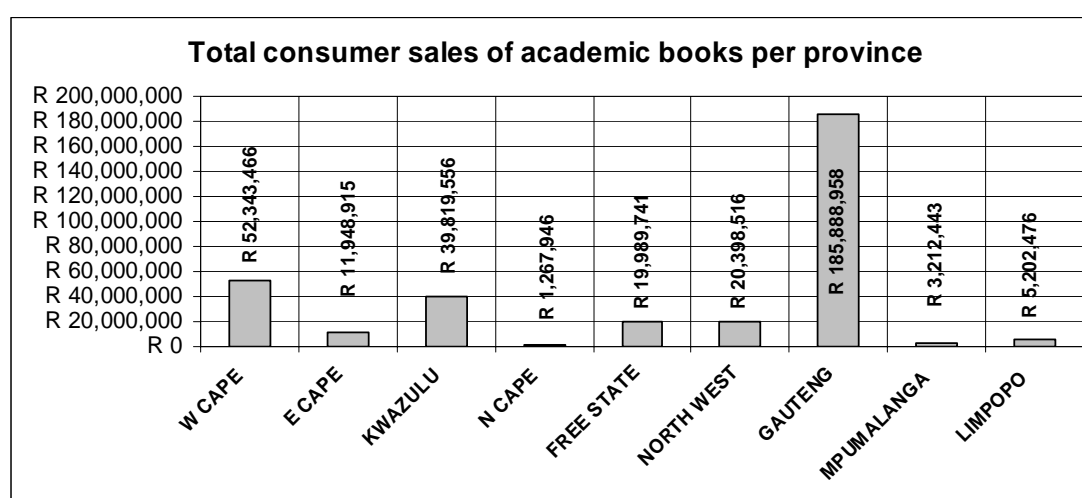
Notes:

- Gauteng contributed 45.6% of all consumer sales of trade books recorded nationwide, followed by the Western Cape with 25.8%.
- Including KwaZulu-Natal, the three largest provinces in terms of turnover accounted for nearly 85% of all recorded consumer sales of trade books.

ACADEMIC BOOKS

Figure 5: Total consumer sales of academic books per province

PROVINCE	SALES	%
WESTERN CAPE	R 52,343,466	15.4%
EASTERN CAPE	R 11,948,915	3.5%
KWAZULU-NATAL	R 39,819,556	11.7%
NORTHERN CAPE	R 1,267,946	0.4%
FREE STATE	R 19,989,741	5.9%
NORTH WEST	R 20,398,516	6.0%
GAUTENG	R 185,888,958	54.7%
MPUMALANGA	R 3,212,443	0.9%
LIMPOPO	R 5,202,476	1.5%
TOTAL	R 340,072,017	100%



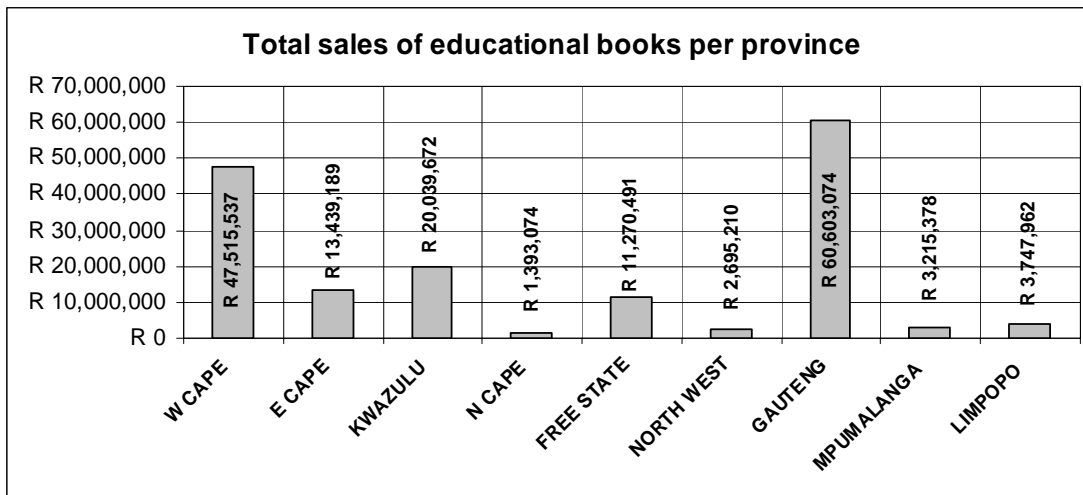
Notes:

- The academic book market is dominated by Gauteng, which accounts for more than half of all recorded sales.
- Once again the top three provinces, Gauteng, Western Province and KwaZulu-Natal, accounted for more than 80% of recorded sales.

EDUCATIONAL BOOKS

Figure 6: Total consumer sales of educational books per province

PROVINCE	SALES	%
WESTERN CAPE	R 47,515,537	29.0%
EASTERN CAPE	R 13,439,189	8.2%
KWAZULU-NATAL	R 20,039,672	12.2%
NORTHERN CAPE	R 1,393,074	0.8%
FREE STATE	R 11,270,491	6.9%
NORTH WEST	R 2,695,210	1.6%
GAUTENG	R 60,603,074	37.0%
MPUMALANGA	R 3,215,378	2.0%
LIMPOPO	R 3,747,962	2.3%
TOTAL	R 163,919,586	100%



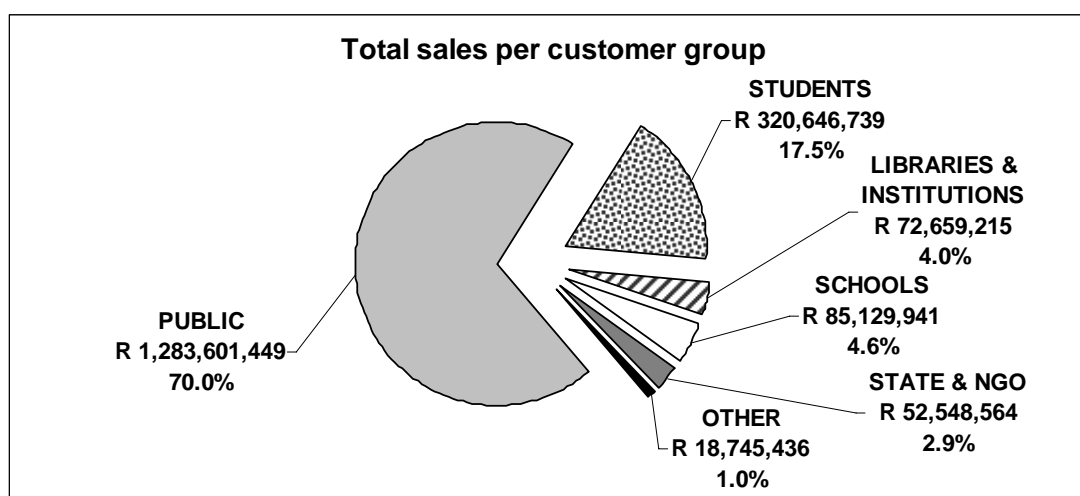
Notes

- Gauteng dominated the recorded sales of educational books directly to consumers (i.e. learners and their parents). However, of the eight booksellers listed as highly desirable participants who failed to respond, six were located in the Western Cape.
- The majority of booksellers who failed to respond in the survey were smaller independent bookshops in the Eastern Cape, KwaZulu-Natal and Limpopo who focus almost exclusively on educational books. As stated before, the survey results on this sub-sector are not regarded as being sufficiently representative of the industry.

CUSTOMER PROFILE

Figure 7: Total sales per customer group

CUSTOMER GROUP	SALES	%
PUBLIC	R 1,283,601,449	70.0%
STUDENTS	R 320,646,739	17.5%
LIBRARIES & INSTITUTIONS	R 72,659,215	4.0%
SCHOOLS	R 85,129,941	4.6%
STATE & NGO	R 52,548,564	2.9%
OTHER	R 18,745,436	1.0%
TOTAL	R 1,833,331,344	100%



Notes:

- The consumer market comprising of the general public and students account for more than 87% of recorded book sales.
- Sales to schools is the second largest contributor to bookseller sales (4.6%) followed by sales to libraries and institutions (4%), and sales to government institutions and NGOs (2.9%).

SUPPLIER PROFILE

Figure 8: Total purchases per source of product

	TRADE	ACADEMIC	EDUCATIONAL
LOCALLY SOURCED	91.5%	62.6%	95.5%
DIRECTLY IMPORTED	8.4%	35.9%	4.5%
SELF-PUBLISHED	0.1%	1.5%	0.0%

Notes:

- Some booksellers were unable to distinguish between locally published books and those sourced from the local distributors of imported books. Hence these two categories were combined under the heading “locally sourced” books, implying that these books were ordered locally, supplied by local distributors, and paid for in the local currency.
- More than 90% of trade books were locally sourced. Of the 8.4% that were imported directly from overseas suppliers, a considerable proportion was remainder or promotional books.
- Very few self published trade books were sold through the traditional book retail outlets.
- A significant proportion of academic books were imported directly from overseas and paid for in foreign currency.
- Academic booksellers reported 1.5% of total purchases made from the authors of self published books.
- More than 95% of educational books sold through the book retail industry were locally sourced.

OWNERSHIP PROFILE

Figure 9: Legal status of booksellers

LEGAL STATUS	NUMBER OF BOOKSELLERS
SOLE PROPRIETOR	1
CLOSED CORPORATION	4
PRIVATE COMPANY	10
PUBLIC COMPANY	8
SECTION 21 COMPANY	1

Notes:

- As most of the smaller and independently owned booksellers did not participate in the survey, the above profile is mainly that of the larger participants in the book retail industry
- No returns were received from Trusts, NGOs or community based enterprises, hence these are not recorded in this report.

Figure 10: Shareholding profile

MAJORITY SHAREHOLDING	NUMBER OF ENTITIES
FOREIGN OWNERSHIP	0
LOCAL OWNERSHIP	24
TYPE OF SHAREHOLDING	NUMBER OF ENTITIES
CORPORATE	9
PRIVATE	15
MAJORITY SHAREHOLDING OF PRIVATE OWNERSHIP	NUMBER OF ENTITIES
AFRICAN	0
COLOURED	1
INDIAN	0
WHITE	11
NO BREAKDOWN AVAILABLE	3
MAJORITY SHAREHOLDING OF PRIVATE OWNERSHIP	NUMBER OF ENTITIES
MALE	11
FEMALE	1
NO BREAKDOWN AVAILABLE	3

Notes:

- The survey reflects the status of only 24 booksellers out of more than 200 recorded in the membership lists of trade associations. Most of the booksellers who did not respond were smaller independent educational and religious booksellers. The survey result nevertheless represents 90% of the industry in terms of sales volumes. (See page 4).
- All survey participants were locally owned.
- Nine participants, including the seven largest booksellers, were subsidiaries of larger enterprises.

- Of the fifteen privately owned bookshops, three were unable to report the profile of their shareholders in terms of population group and gender.
- Of the remaining twelve privately owned booksellers, only the majority shareholding in terms of population group and gender were recorded.

Figure 11: BBBEE status

NOT OFFICIALLY RATED	17
0 - 10%	0
10 – 25%	0
25 – 50%	4
50 – 70%	2
70% PLUS	1

Note:

- A number of participants reported that although their holding companies had been BBBEE rated, the book retail subsidiaries had not been rated separately. Such cases are reported as not having been rated.
- Officially rated implies a rating in terms of the official BBBEE scorecard.

ANALYSIS PER INDUSTRY SUB-SECTOR

Most booksellers had a very definite focus on one of the three industry sub-sectors, and could hence be grouped into one of three categories of booksellers. Generally speaking, the larger the bookseller, the more it focussed on one specific sub-sector of the book industry. However, nearly all booksellers recorded some sales in other sectors besides the given focus.

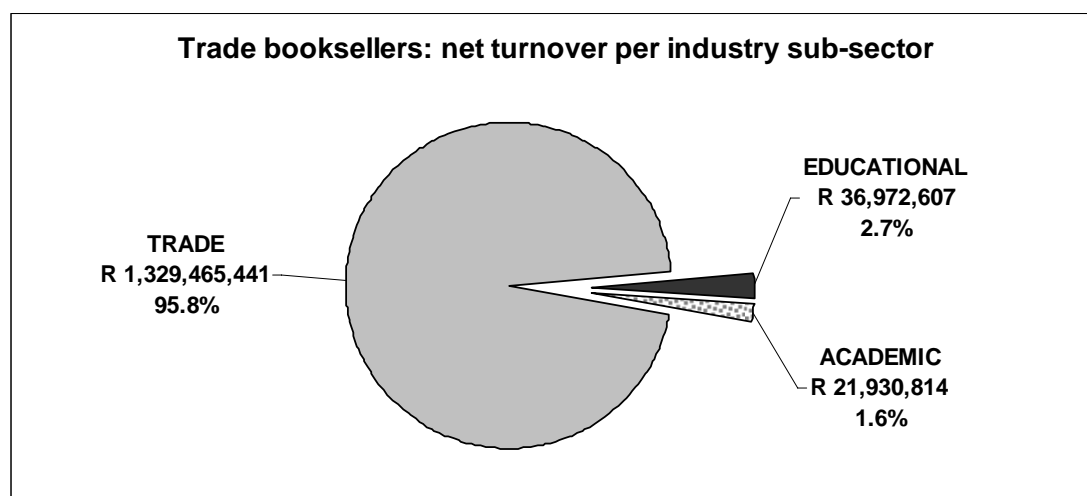
Further analyses were done on the trade and academic sub-sectors, after booksellers were allocated to that sector in which they were most prominent. The two educational booksellers had no overlap with any of the other sectors, and no further analysis was done on this sub-sector.

TRADE BOOKS INDUSTRY SUB-SECTOR

Fourteen booksellers were categorised as mainly trade booksellers. They include the book clubs, library suppliers and religious bookshops.

Figure 12: Total book sales: Trade booksellers

SUB-SECTOR	SALES	%
TRADE	R 1,329,465,441	95.8%
EDUCATIONAL	R 36,972,607	2.7%
ACADEMIC	R 21,930,814	1.6%
TOTAL	R 1,388,368,862	100%

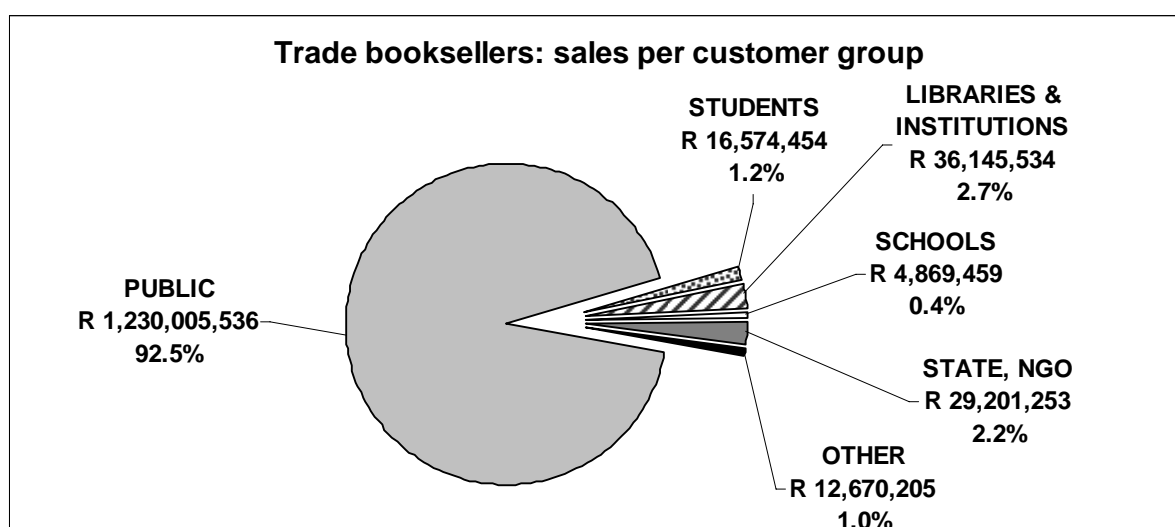


Notes:

- Trade booksellers focus almost exclusively on selling trade books.
- Some educational books are sold to schools and school libraries, and some to parents of schoolgoing learners.
- A few trade booksellers sell academic books by special arrangement with some academic institutions not served by academic bookshops.
- These figures reflect all sales per category of books, consumer as well as institutional sales.

Figure 13: Customer profile: Trade booksellers

CUSTOMER GROUP	SALES	%
PUBLIC	R 1,230,005,536	92.5%
STUDENTS	R 16,574,454	1.2%
LIBRARIES & INSTITUTIONS	R 36,145,534	2.7%
SCHOOLS	R 4,869,459	0.4%
STATE, NGO	R 29,201,253	2.2%
OTHER	R 12,670,205	1.0%
TOTAL	R 1,329,466,441	100%

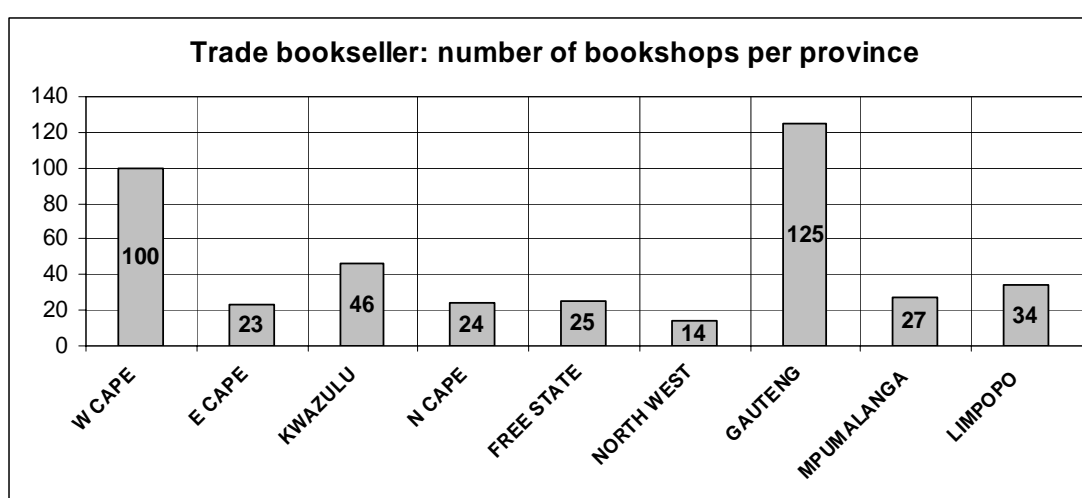


Notes:

- 93.7% of sales are to the consumer (general public and students) as end-user of the product. Sales to institutions make up 6.3% of total net turnover for the trade sub-sector.
- Almost 50% of total industry sales to libraries and institutions are generated by trade booksellers (R 36 145 534 out of a total recorded R 72 659 215 across all sub-sectors. Compare Figure 7).

Figure 14: Number of bookshops: Trade booksellers

PROVINCE	NUMBER OF BOOKSHOPS
WESTERN CAPE	100
EASTERN CAPE	23
KWAZULU-NATAL	46
NORTHERN CAPE	24
FREE STATE	25
NORTH WEST	14
GAUTENG	125
MPUMALANGA	27
LIMPOPO	34
TOTAL	418

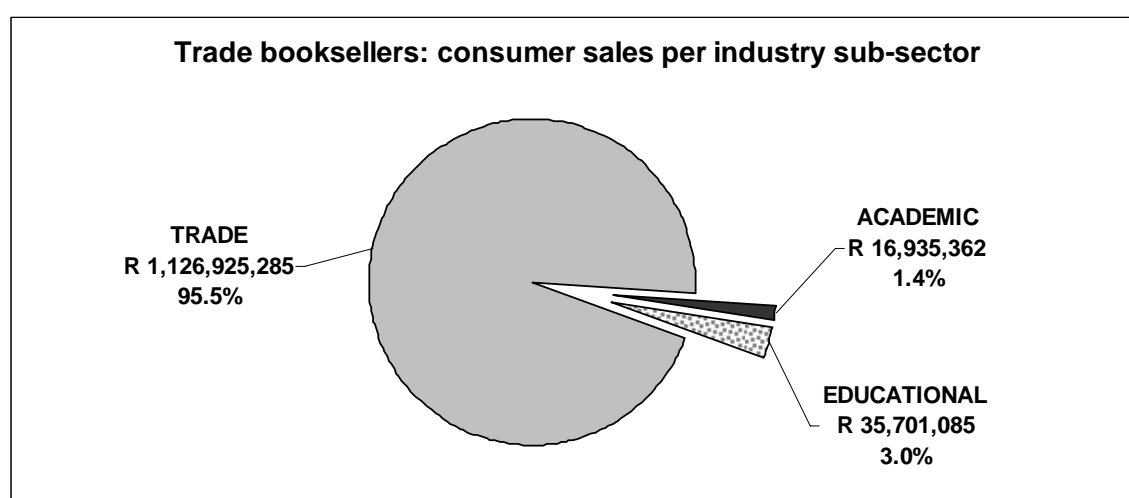


Notes:

- Out of the 491 bookshops recorded in Figure 3, the vast majority (418) focus on the trade sub-sector.
- Book outlets in this sub-sector are concentrated largely in Gauteng (125 outlets) and the Western Cape (100 outlets), with KwaZulu-Natal recording 46 retail outlets for trade books.

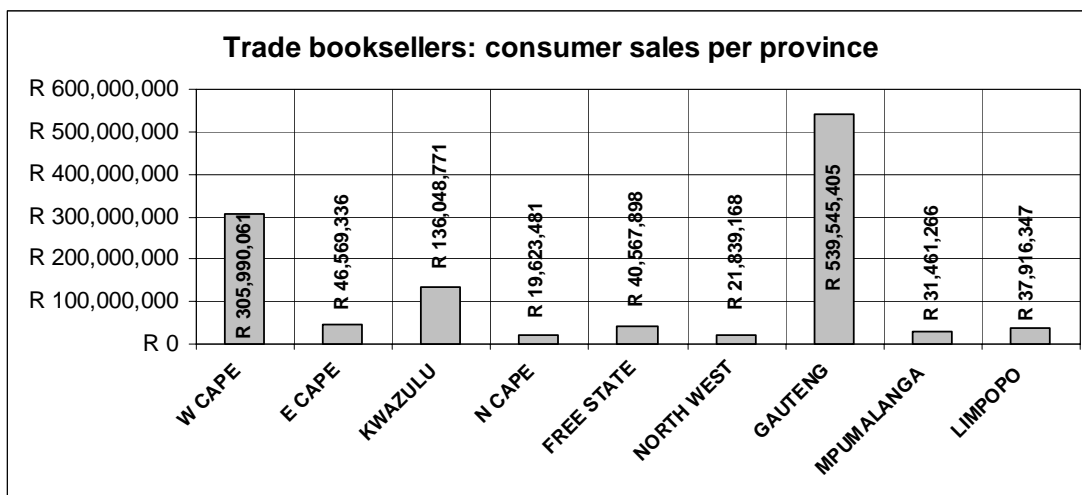
Figure 15: Consumer sales: Trade booksellers

	TRADE	ACADEMIC	EDUCATIONAL	TOTAL	%
WESTERN CAPE	R 296,961,855	R 1,601,406	R 7,426,799	R 305,990,061	25.9%
EASTERN CAPE	R 44,666,620	R 906,623	R 996,093	R 46,569,336	3.9%
KWAZULU-NATAL	R 130,977,173	R 1,974,017	R 3,097,580	R 136,048,771	11.5%
NORTHERN CAPE	R 16,962,461	R 1,267,946	R 1,393,074	R 19,623,481	1.7%
FREE STATE	R 37,862,285	R 1,129,884	R 1,575,729	R 40,567,898	3.4%
NORTH WEST	R 20,229,269	R 607,789	R 1,002,111	R 21,839,168	1.9%
GAUTENG	R 518,641,775	R 6,073,915	R 14,829,714	R 539,545,405	45.7%
MPUMALANGA	R 28,375,504	R 1,150,973	R 1,934,789	R 31,461,266	2.7%
LIMPOPO	R 32,248,341	R 2,222,810	R 3,445,195	R 37,916,347	3.2%
TOTAL	R 1,126,925,285	R 16,935,362	R 35,701,085	R 1,179,561,732	100%
CONTRIBUTION	95.5%	1.4%	3.0%	100%	



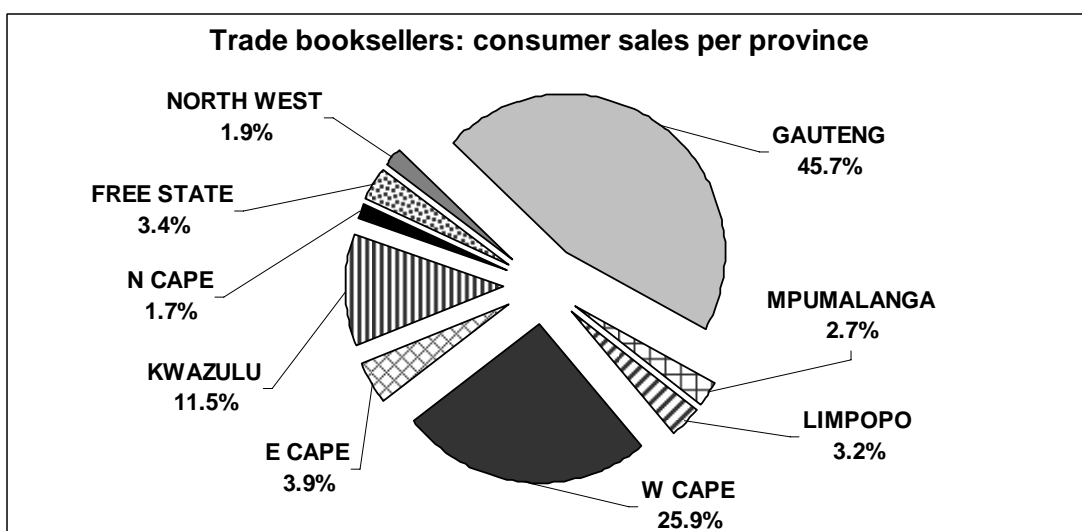
Notes:

- Consumer sales (as opposed to institutional sales) are concentrated heavily in the trade sub-sector.
- Subtracting the sales values of all sales in Figure 12 from the consumer sales values in Figure 15 reveals the values of institutional sales generated by trade booksellers in each of the three industry sub-sectors.



Note:

- Consumer sales of trade booksellers are concentrated in Gauteng (R 539 545 405) and the Western Cape (R 305 990 061).



Note:

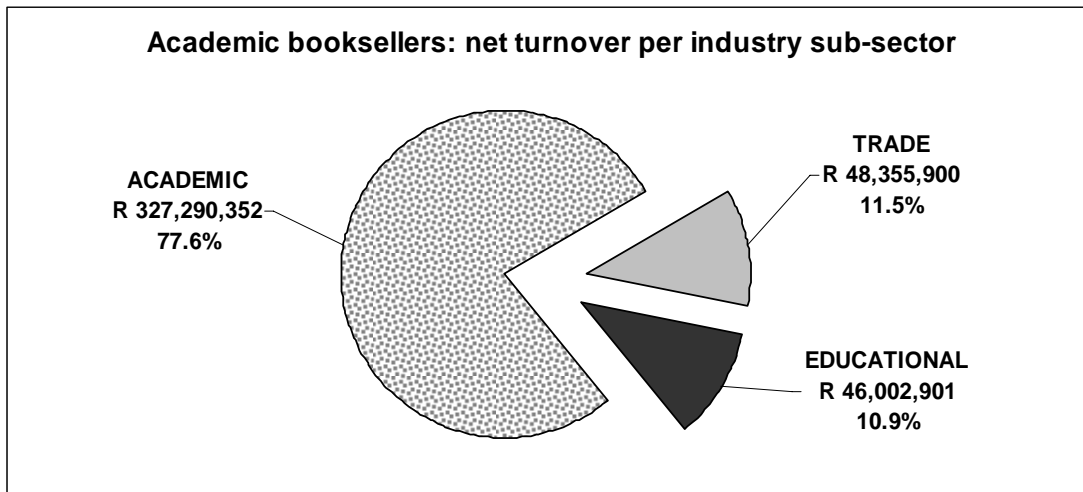
- Gauteng accounts for 45.7% of all consumer sales recorded by trade booksellers, across all three industry sub-sectors. The Western Cape contributes 25.9% of national sales, and KwaZulu-Natal 11.5%.

ACADEMIC BOOKS INDUSTRY SUB-SECTOR

Eight booksellers were categorised as being mainly academic booksellers.

Figure 16: Total book sales: Academic booksellers

SUB-SECTOR	SALES	%
TRADE	R 48,355,900	11.5%
EDUCATIONAL	R 46,002,901	10.9%
ACADEMIC	R 327,290,352	77.6%
TOTAL	R 421,649,153	100%

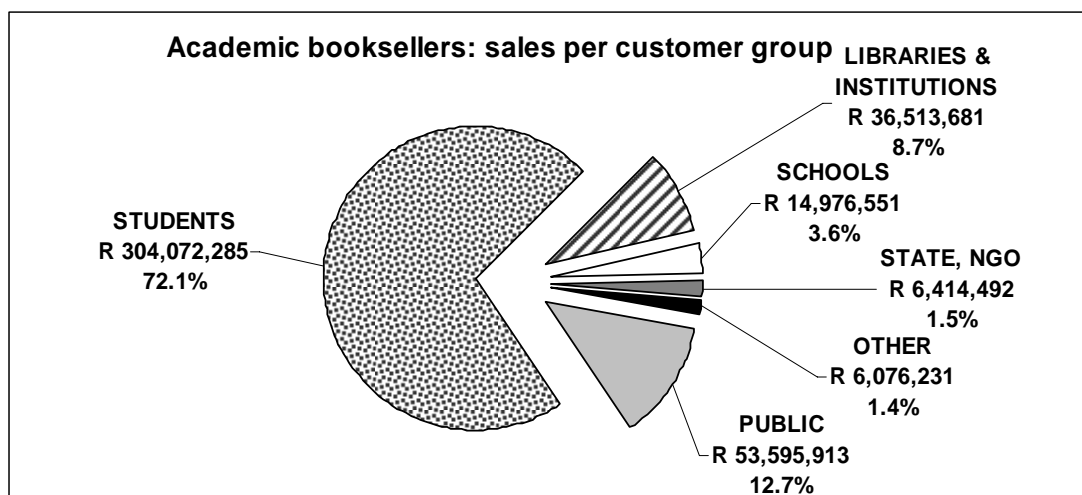


Notes:

- This figure relates to all sales recorded by academic booksellers, consumer as well as institutional sales.
- Academic booksellers focus largely on their primary customers, but to a lesser extent than trade booksellers. Thus, 77.6% of the sales of academic booksellers were recorded in the academic sub-sector, whereas trade booksellers recorded a sector concentration of 95.5%.

Figure 17: Customer profile: Academic booksellers

CUSTOMER GROUP	SALES	%
PUBLIC	R 53,595,913	12.7%
STUDENTS	R 304,072,285	72.1%
LIBRARIES & INSTITUTIONS	R 36,513,681	8.7%
SCHOOLS	R 14,976,551	3.6%
STATE, NGO	R 6,414,492	1.5%
OTHER	R 6,076,231	1.4%
TOTAL	R 421,649,153	100%

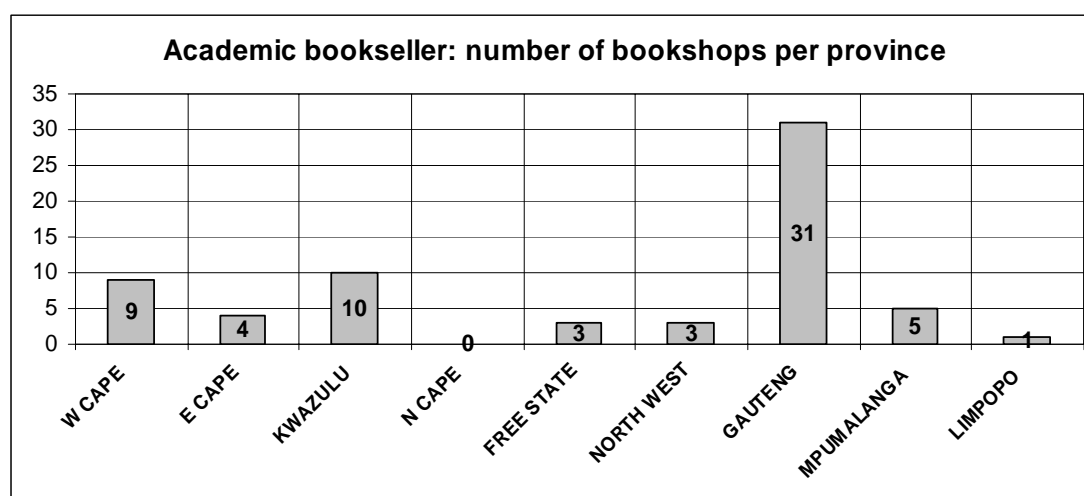


Notes:

- Academic booksellers supplement their sales to consumers with institutional sales to a larger extent than trade booksellers do. Academic booksellers recorded 15.2% of total sales sold to institutions, whereas trade booksellers recorded only 6.3% in Figure 13.
- Whereas many academic bookshops are located on or close to academic campuses, which restricts their sales to students and academic libraries, some are situated in central business districts which enable them to capture a share of the trade sub-sector.

Figure 18: Number of bookshops: Academic booksellers

PROVINCE	NUMBER OF BOOKSHOPS
WESTERN CAPE	9
EASTERN CAPE	4
KWAZULU-NATAL	10
NORTHERN CAPE	0
FREE STATE	3
NORTH WEST	3
GAUTENG	31
MPUMALANGA	5
LIMPOPO	1
TOTAL	66

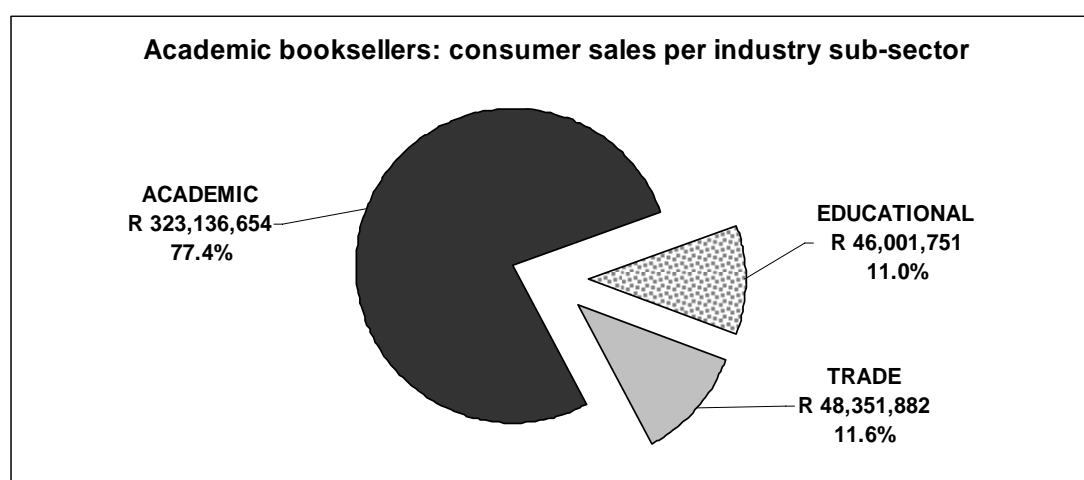


Note:

- Nearly half (31) of all (66) academic bookshops are located in Gauteng.

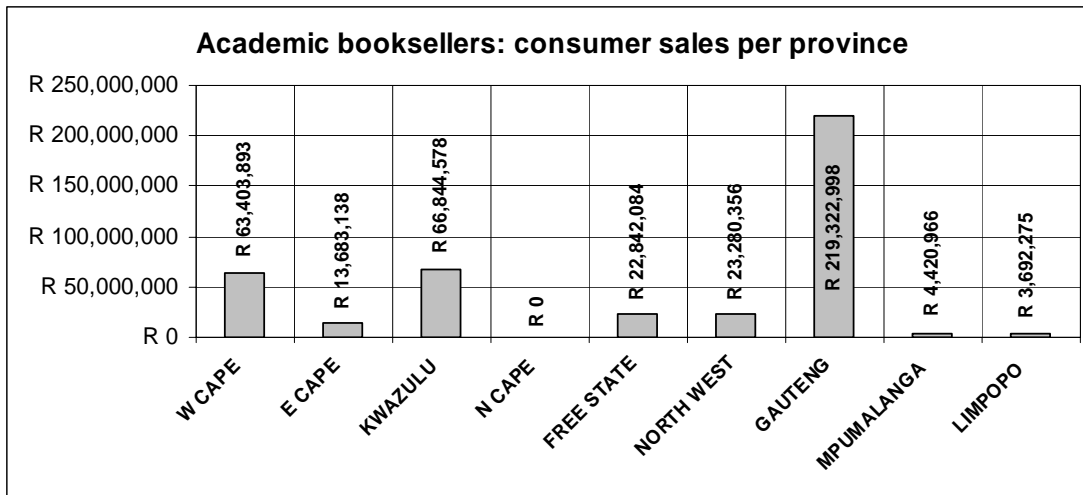
Figure 19: Consumer sales: Academic booksellers

PROVINCE	TRADE	ACADEMIC	EDUCATIONAL	TOTAL	%
WESTERN CAPE	R 5,992,095	R 50,742,060	R 6,669,738	R 63,403,893	15.2%
EASTERN CAPE	R 1,518,828	R 11,042,293	R 1,122,017	R 13,683,138	3.3%
KWAZULU-NATAL	R 17,668,689	R 37,845,538	R 11,330,351	R 66,844,578	16.0%
NORTHERN CAPE	R 0	R 0	R 0	R 0	0.0%
FREE STATE	R 2,290,297	R 18,859,857	R 1,691,931	R 22,842,084	5.5%
NORTH WEST	R 1,796,529	R 19,790,728	R 1,693,099	R 23,280,356	5.6%
GAUTENG	R 17,596,694	R 179,815,043	R 21,911,260	R 219,322,998	52.5%
MPUMALANGA	R 1,078,907	R 2,061,470	R 1,280,588	R 4,420,966	1.1%
LIMPOPO	R 409,843	R 2,979,666	R 302,767	R 3,692,275	0.9%
TOTAL	R 48,351,882	R 323,136,654	R 46,001,751	R 417,490,287	100%
CONTRIBUTION	11.6%	77.4%	11.0%	100%	



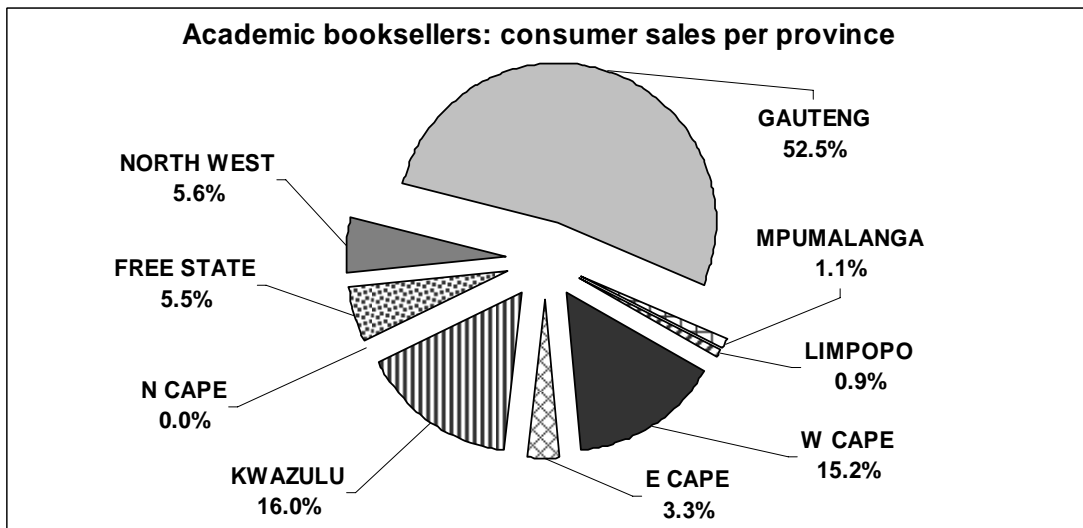
Note:

- Excluding institutional sales, academic booksellers recorded 77.4% of total sales in the academic sub-sector. Trade and educational books made more or less equal contributions to total sales.



Note:

- No academic booksellers operate in the Northern Cape.



Notes:

- Gauteng recorded more than 52% of total consumer sales by academic bookshops, followed by KwaZulu-Natal (16%) and the Western Cape (15.2%).
- There is a dramatic fall in turnover from the larger three provinces in terms of sales to the smaller ones, with the Northern Cape recording no sales at all.

Final remarks and proposals for future research

- Because only two educational booksellers participated in the survey, and because they do not represent a balanced cross-section of this sub-sector, no further analyses were done on the educational sub-sector of the book retailing industry.
- As this is the first representative report on the book retail industry, it sets a benchmark for future surveys.
- To record the dynamics of the book retail industry, the survey should ideally be conducted annually, but at least every second year. After a number of surveys, researchers should be able to record the broad trends in the industry.
- The survey fell short of its objective to record employment statistics and profiles. Booksellers should be encouraged to develop systems which will enable them to report on these parameters in future surveys.
- This survey needs to be put in the broader perspective of the entire South African book industry, as the majority of schoolbooks bypass the book retail industry and are sold directly to educational institutions and provincial departments. The relationship between this survey and the annual industry survey conducted by the Publishers' Association of South Africa (PASA) needs to be explored.
- An in-depth survey relating the sale of all categories of books to the socio-economic factors which drive such sales will greatly enhance our understanding of the South African book industry.
- Also valuable would be studies on book readership and book buying, and the demographic, educational, economic and cultural factors that influence readership and book buying behaviour.

The research team trusts that the industry will derive value from the survey and be prepared to fund future surveys and research on this fascinating industry.

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