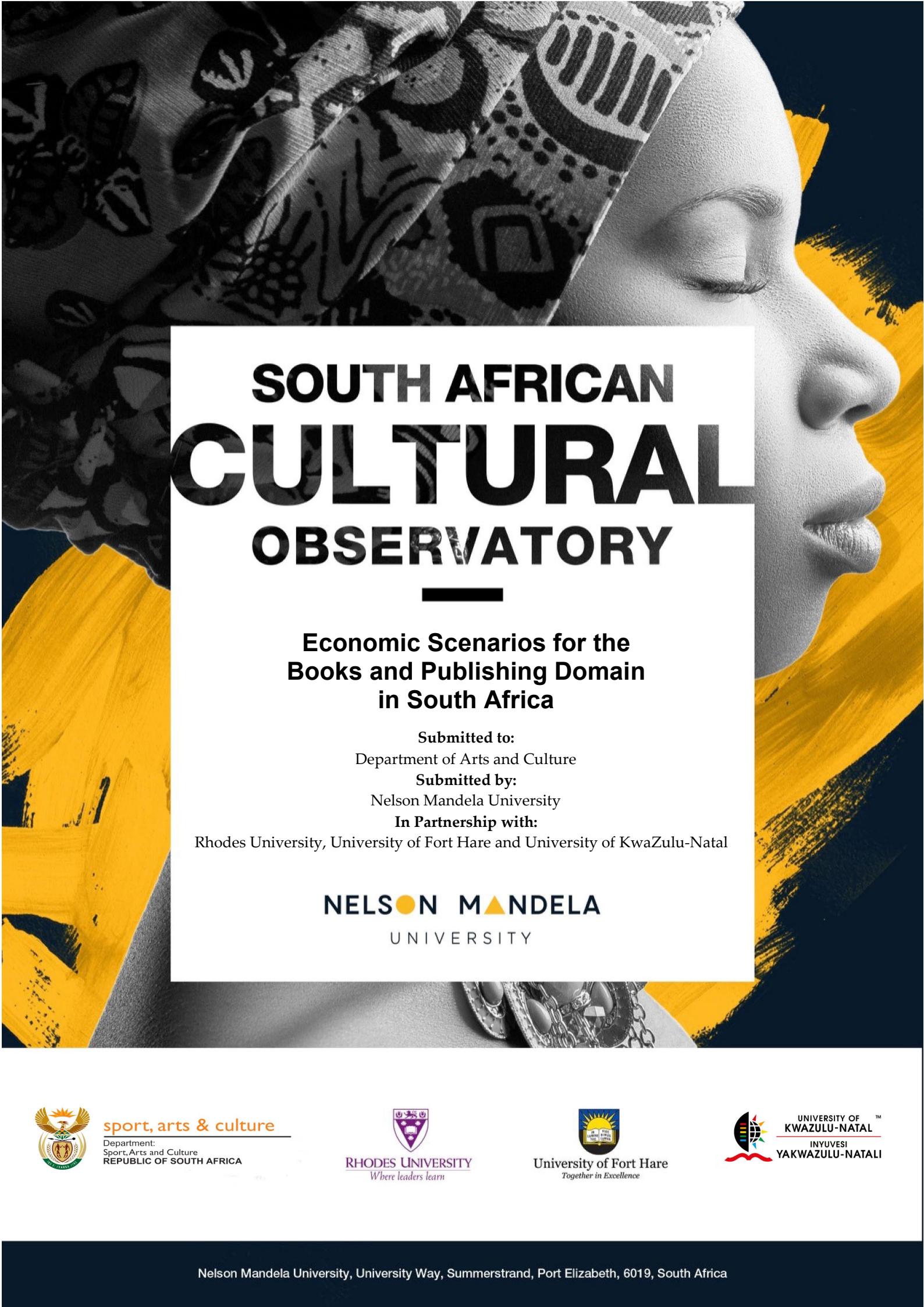




SOUTH AFRICAN CULTURAL OBSERVATORY

Economic Scenarios for the Books and Publishing Domain in South Africa

Submitted to:

Department of Arts and Culture

Submitted by:

Nelson Mandela University

In Partnership with:

Rhodes University, University of Fort Hare and University of KwaZulu-Natal

NELSON MANDELA
UNIVERSITY



sport, arts & culture

Department:
Sport, Arts and Culture
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South African Cultural Observatory

Report

**Economic Scenarios for the Books and
Publishing Domain in South Africa**

December 2021

Submitted to the Department of Sports, Arts and Culture

Summary

Written communication has evolved as new technologies were developed and will continue to do so. Books are so plentiful it seems difficult to imagine a world without them. New technologies are not only changing the way we consume books but is having an impact on the industry.

Although there are challenges the fourfold goal of the South African Book Policy including: More South African writers telling South African stories in South African languages; More South African book published and printed in South Africa; More books available to all South Africans in urban, peri-urban, and rural areas; and the reading culture across entire South African society including reading for leisure and understanding.

The reading culture in South Africa is declining and new forms of recreational activities are competing for potential readers' time. Literacy rate are not as much as a deterrent as it was in the past but nevertheless does play a role. Parents are guardians are not reading as much to their children as they could be.

They are writers, many of whom write for their own pleasure (mainly poets). However, many potential writers are not writing because of the size of the South African market. There are also few full-time authors in South Africa because it is difficult to make a living on writing alone. The National Arts Council, The DBE, Lotto, and other institution providing financial assistance or making decisions on purchasing books could make grants available to suitable writers.

The sector has transformed, more needs to be done. More new black publishers be established each year. This would include one new black publisher province and to new black publishers for the Western Cape, KwaZulu-Natal and Gauteng. The National Empowerment Fund (NEF) supports black-owned businesses and entrepreneurs to acquire funding for their businesses. The SEFA offers entrepreneurs finances to start and grow their businesses

Key Findings

- The publishing sector is declining slowly in relative terms.
- The book is changing and more eBooks are available but the paper book will not disappear soon.
- Foreign Competition is having an impact.
- However, there is a huge potential market in Africa
- Publishers need to provide more support to authors and encourage them.
- National Book Month can have a big impact

Contents

1	Introduction	1
	Policy Imperatives	1
	Technology	2
1.1	Purpose of This Research	2
2	Current State of Publishing	4
2.1	A macroeconomic overview	4
2.2	Supply-side Issues	5
2.2.1	Writers	5
2.2.2	Publishers	6
	Economies of Scale	6
	Structure the Publishing Sector in South Africa	7
	Transformation	7
2.2.3	Physical Production	7
	Output	8
	Gross Value Added	8
	Employment	9
	Capital Stock	9
2.2.4	Royalties	10
2.3	Demand Side	10
2.3.1	Expenditure at Basic Prices	10
2.3.2	The Publishing Industry Sub-sectors	11
2.3.3	Physical Volume of Printing Production Relative Total to Manufacturing Production ...	12
2.3.4	Newspapers and Periodicals	13
2.4	Capacity Utilisation	14
2.5	Inflation	15
2.5.1	Trade	16
2.5.2	Registered Number of Vendors Registered for VAT	18
2.6	Trade	19
2.6.1	Imports	19
2.6.2	Export	19
2.7	Reading in South Africa	20
	Language	21
2.8	Conclusion	22
3	Emerging and Possible Future Trends	23
3.1	New Technologies	23
	Developing and Evolving Technologies	23
3.2	Reading Material	24
	Political Non-fiction	24
	Children's Books	24
	Short Stories	24
	Academic Books	24

Audiobooks	25
Newspapers	25
3.3 New Business Models	25
E-Books	26
Number of Books Published	26
Sale of Books	26
Price of Books	26
More Writers	26
3.4 COVID-19	26
The Reader	27
3.5 Market Failure	27
3.6 The Future of Publishing and Possible Scenarios	28
3.7 Conclusion	28
4 Economic Scenarios	29
4.1 Forecasting	29
4.2 Econometric Forecasting	29
4.3 Foresight	30
South Africa and African Scenario Exercises	31
4.4 Expert Interviews	32
4.4.1 Academic Books	32
4.4.2 Education Books	32
4.4.3 Trade Books	32
4.4.4 Newspapers	32
4.4.5 Libraries	32
4.4.6 Editors	32
4.4.7 Writers	32
4.5 Conclusion	32
5 Three Scenarios for the Books and Publishing Domain	33
5.1 Scenario 1: Baseline	33
5.2 Scenario 2: Low Road	33
5.3 Scenario 3: High Road	33
5.4 Vision	33
5.5 Mission	34
5.6 Policy Goals	34
6 Recommendations	35
6.1 Content Generators	35
6.1.1 Writers	36
6.1.2 Fiction and Trade Authors	36
6.1.3 Academic Writers	36
6.1.4 Translators	36
6.1.5 Copyright Amendment Bill	36
6.2 The Role of Government	37

6.3	Funding and Other Support	37
6.4	Book Month	37
6.4.1	Libraries	37
6.4.2	Schools (Department of Basic Education)	37
6.4.3	Book Stores (Book Readings)	38
6.4.4	Book Fairs	38
6.5	Equity	38
6.5.1	New Black Publishers	38
6.5.2	Hubs/Cluster Development	38
6.5.3	Funding	38
6.6	Technology and E-books	39
6.7	Reading Culture	39
6.8	Access to Books	40
6.9	Book Clubs	40
6.10	Export Development	41
6.11	Integrated National Strategy	41
7	Conclusion	42
	E-books	2
	What Is an Imprint?	4
7.1.1	Why Do They Matter?	4
	Who Published Them?	4
7.1.2	How Do I Choose One?	4
7.1.3	Can I Use My Company Name? Should I?	5
7.1.4	Will People Know I Self-published If I Use My Own Imprint?	5
7.1.5	Are There Any Rules I Need to Follow in Selecting My Imprint Name?	5
7.1.6	Can I Use a Name That Is Been Trademarked? How Do I Find Out If the Name I Picked Is Available?	6
7.1.7	Can I Change It Later?	6
7.1.8	Do I Need to Set This Imprint Up As a Business? Or Get a Trademark?	6
7.1.9	The Final Word on Publishing Imprints	6
7.2	What Is the Difference Between Self-Publishing and Traditional Publishing?	7
7.3	Who Should Traditionally Publish?	7
7.4	Who Should Self-Publish?	7
7.5	What Are the Advantages and Disadvantages?	8
7.5.1	Self-Publishing	8
7.5.2	Traditional Publishing	8
7.6	Self-Publishing vs Traditional Decision Tree	9
7.6.1	Question 1: Can You Get a Traditional Publishing Deal?	9
7.6.2	Question 2: If You Can Get a Traditional Publishing Deal, Should You Take It?	9
7.7	Conclusion: Self-Publishing Is Probably the Right Answer (97+% of the Time)	9

Tables

1	Introduction	1
	Policy Imperatives	1
	Technology	2
1.1	Purpose of This Research	2
2	Current State of Publishing	4
2.1	A macroeconomic overview	4
2.2	Supply-side Issues	5
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2.2.2	Publishers	6
	Economies of Scale	6
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3.5 Market Failure	27
3.6 The Future of Publishing and Possible Scenarios	28
3.7 Conclusion	28
4 Economic Scenarios	29
4.1 Forecasting	29
4.2 Econometric Forecasting	29
4.3 Foresight	30
South Africa and African Scenario Exercises	31
4.4 Expert Interviews	32
4.4.1 Academic Books	32
4.4.2 Education Books	32
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4.4.4 Newspapers	32
4.4.5 Libraries	32
4.4.6 Editors	32
4.4.7 Writers	32
4.5 Conclusion	32
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5.2 Scenario 2: Low Road	33
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5.5 Mission	34
5.6 Policy Goals	34
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6.1.3 Academic Writers	36
6.1.4 Translators	36
6.1.5 Copyright Amendment Bill	36
6.2 The Role of Government	37

6.3	Funding and Other Support	37
6.4	Book Month	37
6.4.1	Libraries	37
6.4.2	Schools (Department of Basic Education)	37
6.4.3	Book Stores (Book Readings)	38
6.4.4	Book Fairs	38
6.5	Equity	38
6.5.1	New Black Publishers	38
6.5.2	Hubs/Cluster Development	38
6.5.3	Funding	38
6.6	Technology and E-books	39
6.7	Reading Culture	39
6.8	Access to Books	40
6.9	Book Clubs	40
6.10	Export Development	41
6.11	Integrated National Strategy	41
7	Conclusion	42
	E-books	2
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7.1.6	Can I Use a Name That Is Been Trademarked? How Do I Find Out If the Name I Picked Is Available?	6
7.1.7	Can I Change It Later?	6
7.1.8	Do I Need to Set This Imprint Up As a Business? Or Get a Trademark?	6
7.1.9	The Final Word on Publishing Imprints	6
7.2	What Is the Difference Between Self-Publishing and Traditional Publishing?	7
7.3	Who Should Traditionally Publish?	7
7.4	Who Should Self-Publish?	7
7.5	What Are the Advantages and Disadvantages?	8
7.5.1	Self-Publishing	8
7.5.2	Traditional Publishing	8
7.6	Self-Publishing vs Traditional Decision Tree	9
7.6.1	Question 1: Can You Get a Traditional Publishing Deal?	9
7.6.2	Question 2: If You Can Get a Traditional Publishing Deal, Should You Take It?	9
7.7	Conclusion: Self-Publishing Is Probably the Right Answer (97+% of the Time)	9

Figures

Figure 1: The traditional distribution chain	5
Figure 2: Long tail graph	6
Figure 3: Physical output of the publishing sector	7
Figure 4: Output - Publishing, printing and recorded media	8
Figure 5: The expected post-Covid recovery path	9
Figure 6: Total assets in the publishing sector	10
Figure 7: Expenditure on royalties and other intellectual property	10
Figure 8: Gross value added (GVA) at basic prices	11
Figure 9: Expenditure at basic prices	11
Figure 10: Publishing sectors in South Africa	12
Figure 15. Physical volume of printing production relative total to manufacturing production	13
Figure 11 Circulation statistics for printed daily newspapers	13
Figure 12: Circulation of weekly publications	14
Figure 13: Capacity utilisation	14
Figure 14: Reasons for unutilised capacity	15
Figure 16: South Africa's CPI and CPI of selected CCIs	16
Figure 17: CPI of books and newspapers and periodicals	16
Figure 18: Export markets for South African publications in 2020	17
Figure 19: Number of VAT vendors	18
Figure 20: VAT Collected in South Africa	18
Figure 21: Import into South Africa	19
Figure 22: Exports from South Africa	20
Figure 23: Publishing in South Africa's Official Languages	21
Figure 24: Among those who speak more than one language at home, percentage of people speaking each official language as their second home language	22
Figure 25: Econometric forecast of the publishing sector	30
Figure 26. Intuitive Logics scenario development process	31

Table of Abbreviations

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BBBEE	
BRICS	
CCI	Cultural and creative industries
CI	
CNA	
CPI	Consumer Price Index
DBE	
DSAC	
DST	
ECD	Early childhood development
GDP	Gross domestic product
GVA	Gross value added
ICT	Information and Communication Technologies
ILPP	Indigenous Languages Publishing Programme
IO	
IP	
ISBN	
ISMN	International Standard Music Number
ISSN	International Standard Serial Number
KDP	
LGBTQ	
MinMEC	
NEF	National Empowerment Fund
NESOI	
NYT	
ONE	
PASA	Publisher's Association of South Africa
PPI	Producer Price index
SABDC	
SACO	
SADC	Southern African Development Community
SARS	

SEFA

UNESCO

United Nations Economic, Social and Cultural Organisation

US

WSJ

Definitions

Publishing:

Publishing in all its various formats: books, newspapers, and periodicals. It also includes the electronic or virtual forms of publishing such as online newspapers, e-books and the digital distribution of books and press materials. Libraries, both physical and virtual, are included in this domain as are book fairs. (source: <http://uis.unesco.org/node/3080124>)

Library:

Organisation, or part of an organisation, whose main aims are to build and maintain a collection and to facilitate the use of such information resources and facilities as are required to meet the informational, research, educational, cultural or recreational needs of its users; these are the basic requirements for a library and do not exclude any additional resources and services incidental to its main purpose (ISO, 2006). It includes any organised collection of books and periodicals in electronic or in printed form or of any other graphic or audio-visual materials (based on 'UNESCO, 1970). It includes virtual libraries, digital catalogues.

Print and Online Newspaper

Printed as a hard copy and also published online. The online newspaper can be a free or paid version of the print newspaper.

Creatives

This refers to a class within society that have the ability, through their intellectual abilities that they have been endowed with or have developed, to produce new products and services. Many creatives use their ability to express their originality through art in the broadest sense. They are expressive and imaginative. Many creatives practice their abilities to produce an income and earn a living, while others (amateurs) simply enjoy being creative. Many creatives are also in the broader economy using their talents as an input into developing new commercial products or services (such as automotive designers or fashion designers), others (such as architects or those in advertising) are involved in producing creative products. Creatives are involved in the production of visual arts, crafts, music, performing arts, writing, making films or video and even creating computer games to name a few. This report will use the term "creatives" to refer to people working in cultural or creative occupations, both in Creative Industry, or embedded in other industries.

Creative Products

The United Nations Economic, Social and Cultural Organisation (UNESCO) has developed a Framework for Cultural Statistics that include six domains and several subdomains:

Cultural and Natural Heritage (museums, archaeological and historic places, cultural landscapes, and natural heritage);

Performance and Celebration (performing arts, music, festival, fairs and feasts);

Visual Arts and Crafts (fine art, photography and crafts);

Books and Press (books, other printed matter, libraries and book fairs);

Audio-Visual and Interactive Media (film, video, TV, radio, live streaming, podcasting, and videogames);

Design and Creative Services (fashion design, graphic design, interior design, landscaping, architecture, and advertising)

Cultural Diplomacy

Cultural diplomacy is a term that is given to a nation's soft diplomatic efforts and other strategies to strengthen its international relations and to promote its culture and creative sectors with other countries.

Transformation

In the South African context, transformation refers to changes in the demographics of CI ownership, freelance workers and employees, to better reflect the demographic profile of the country in terms of race, gender, and people living with disabilities.

Innovation Hubs

A creative innovation hub is a physical space that provides creative entrepreneurs with resources for innovative activities and product development. Innovation hubs may include collaborative and individual working and meeting spaces, access to technology and the internet, skills development, and talks/advice on marketing, distribution and general business management.

Creative Industry Clusters

Much research has found that the Creative Industry tends to agglomerate spatially, or "cluster" around specific locations, most often larger cities and metropolitan areas. The need for specialist inputs and skills for specific projects, as well as innovation spill overs between creative firms, explains such patterns.

Audience Development

Audience development refers to strategies by the public and private sector, as well as CI practitioners, to inform and educate people about cultural and creative products and services, and to develop their interest in, and taste for, CI outputs.

Intellectual Property

Intellectual property refers to intangible creations or inventions of the mind which, if legally protected and properly managed, can be used to generate financial income for the recognised creator. It includes, but is not limited to, designs, literary works, images, music, choreography, film and television productions, symbols and names.

Local Content

Local content refers to domestically manufactured creative goods or domestically supplied creative services. In the Creative Industry, local content may also reflect the cultural heritage, language, history and art of South Africa. Local content quotas can be used to stimulate demand for South African creative goods and services.

Gatekeepers

Gatekeepers are people or institutions that control access to markets and audiences. Gatekeepers can play an important role in quality control, marketing and value creation, but may also unfairly limit access if their judgements are biased. In the CI, gatekeepers can refer to galleries, auction houses, publishers, broadcasters, content commissioners, retail outlets, among others.

Intrinsic Value

The intrinsic value is to anything that is valuable on its own right, i.e. "in itself," "as such," "in its own right." or "for its own sake." It is not possible to place a monetary value on the intrinsic value of something. Instrumental value, akin to economic or utilitarian value, is something worth having as a means for getting something else. Intrinsic value (as opposed to instrumental value or extrinsic value) derives its value from the value it has for its own sake. Intrinsic and instrumental goods are not mutually exclusive and some goods or services can be found to be both good (in themselves - i.e. intrinsically) while simultaneously being good for getting other things that have value (i.e. instrumentally or extrinsically).

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1. Introduction

Written communication has evolved as new technologies were developed and will continue to do so. Books are so plentiful it seems difficult to imagine a world without them. Walt Disney is reported to have said¹ “Times and conditions change so rapidly that we must keep our aim constantly focused on the future.” This is also true for books and publishing. Although books as we know them have been not around for so long relatively speaking, there is ample evidence that written communication has been around for millennia. Societies have always had a desire to capture their thoughts and experiences in a more permanent format. Oral traditions where people would memorise their history, literature or even the law have been used extensively since time in memorial and can be found in “all corners of the world” (Mackay, 1999). Similarly, rock art or inscriptions to have a long history and are found across the world (Whitley, 2005).

Ancient civilisations used clay, stone or wax tablets for the records. Before printing, books and other literary works scribes copied manually. Avrin (2010) points out that several wax tablets were often bound together and was the precursor to the codex or book. However, it was not until the development of papyrus, parchment, vellum and paper that made books possible. Initially, reading material was not bound but rather the form of scrolls that were made from papyrus.

The book industry has a long and important history is business and dates back to 300 BC, when the Alexandrian library was founded in Egypt (Boda et al., 2014). With printing, publishing progressed hand-in-hand with the development of books. The book or codex (which is generally referred to a few books) emerged during the 1st century and particularly gained widespread use among the Christian community (Young et al., 2004).

Although the block printing can be dated back to the first century in China, it was Gutenberg’s letterpress, invented in the 15th century, that revolutionised the book industry. It made it possible to mass produce books. By the time of the Industrial Revolution, printing had changed dramatically. The 1800s saw the lithography and the linotype technologies entering the printing world (Hawley, 2020).

Today books are indispensable. Indeed, until the digital era books were not only are the most important medium to convey and record knowledge but are considered a mainstay for recreation and leisure. Newspapers (although not strictly speaking books) are important for the conveyance and analysis of news events and help keep people up to date with events across the world. Similarly, magazines and journals tend to convey specific knowledge to an intended audience. Seshadri (2020) further pointed out how books play an important role in social relations. This is observed in bookshops, cinemas, theatres, museums libraries, schools’ colleges and many other institutes.

Policy Imperatives

Books (including e-books and the internet) are the best way to convey and retain knowledge. However, it is important that people have the ability to read and understand what is presented. This has been recognised by the United Nations with the Sustainable Development Goals where it is stated that “Every human being should have access to books and literacy

¹ <https://quotekind.com/topic/the-43-best-revenge-quotes-for-you-read-share/> downloaded 9 September 2021.

programmes by 2030.” In South Africa the National Development Plan also recognises the importance of the ability to read and states: “We love reading. All our citizens read, write, converse, and value ideas and thought. We are fascinated by scientific invention and its use in the enhancement of our lives. We live the joy of speaking many of our languages. We know our history and that of other peoples (National Planning Commission, 2012). This is a close the South African Constitution where in Chapter Two, Section 16 (1) it states that: Everyone has the right to freedom of expression, which includes a. freedom of the press and other media; b. freedom to receive or impart information or ideas; c. freedom of artistic creativity; and d. academic freedom and freedom of scientific research. Section 6(2) of the language clause in the Constitution enjoins the state to “make practical and positive measures to elevate the status and advance the use” of the indigenous languages. Article 27 of the Universal Declaration of Human Rights: “everyone shall have the right to freely participate in the cultural life of the community (and) to enjoy the arts...”

“Books play an important role in social relations and is also evident from bookshops, cinemas, theatres, museums. We are always supported by authors, booksellers, librarians, schools, colleges and many other institutes of excellence. Their support helps us to continue to share good stories and content” (Seshadri, 2020).

Technology

Even though the technology is being integrated at an ever-increasing rate in almost all the sectors of our society, its ethical, pedagogical, and epistemological implications on the books and the publishing sector in general remain unknown. There has been some early adoption, but it is yet unclear if technological innovations will replace the book as we know it.

1. Purpose of This Research

With rapid change and uncertainty, responsible decision making and policy making must take various future possibilities into account. The purpose of this research is to suggest possible scenarios all CCI stakeholders (including all three spheres of government) with guidelines for better planning and recommending uses of strategic foresight (or forecasting) in decision making and policy making. A goal would also to build greater anticipatory capacity.

Forecasting is generally the process of making predictions based on past and present data and most commonly by analysis of trends. Although, forecasting or predictions of the future are never certain various scenarios can be determined and evaluated to help plan. It is important to know what elements can be more accurately or less accurately determined. In February 2002, Donald Rumsfeld, the then US Secretary of State for Defence, stated at a Defence Department briefing: ‘There are known knowns. There are things we know that we know. There are known unknowns. That is to say, there are things that we now know we do not know. But there are also unknown unknowns. There are things we do not know we do not know.’²

In addition to new technologies, South Africa is, and has been living in volatile times with periods of rapid change. Societies in South Africa and across the global are growing more complex. These conditions require preparing for the unexpected future changes.

² "Defense.gov News Transcript: DoD News Briefing – Secretary Rumsfeld and Gen. Myers, United States Department of Defense (defense.gov)". February 12, 2002. <https://archive.ph/20180320091111/http://archive.defense.gov/Transcripts/Transcript.aspx?TranscriptID=263>

2. Current State of Publishing

Abba (2019) argues that the publishing exists as an industry is that it is “actually incredibly difficult to edit, produce, market and distribute a book if you’re not an organisation that’s geared around doing just that, and publishing does do that rather well.” Publishers offer a valuable service to authors who on their own would in likelihood not be able to sell the work. Information technology has changed and is continuing to change the publishing sector. As soon as information became digital and the marginal cost of distributing information practically went to zero. This opened a lot of new publishing opportunities. These new technologies include smartphones, digital publishing, self-publishing, e-books, e-book readers such as Kindles, and audiobooks disrupted the traditional publishing business model forever.

There are many factors that are influencing the state of publishing in South Africa currently. Perhaps the most important factor to consider in publishing today across the world but also in South Africa is the dropping propensity to read. There are a wide variety of activities that compete with reading. These include sport, computer gaming, cinema, TV and social media.

Technology, especially ICT, is advancing rapidly and making the creation, publication, and distribution of books easier. There is therefore increased competition. Readers, who have various alternatives for leisure activity, also have to face a huge choice of reading material. This makes it less profitable for authors, publishers and distributors.

Currently, COVID-19 has also had a negative impact on the reading of books. Many traditional bookstores have not been open (and even one large chain (CNA) closed down) and readers have resorted to other media including e-books. Even though the COVID-19 dropper can be seen in the graphs below, this occurred at a time when the sector was already suffering. From surveys undertaken by SACO (2020, 2021) the recovery of the sector will be slower and take longer than other sectors.

Jane Raphaely & Associates’ publications including *Cosmopolitan*, *House & Leisure*, *Good Housekeeping* and *Women on Wheels* closed down. Julia Raphaely stated that “The lockdown had closed printing and distribution channels, halted advertising spend and made it impossible to host events for the foreseeable future” (Times LIVE, 2020).

1. A macroeconomic overview

This section covers mainly the economic position of the books and publishing sector. Other considerations are also included but presented from either a financial or economic point of view. The traditional value chain shown below, and the aspects of each component will be considered.

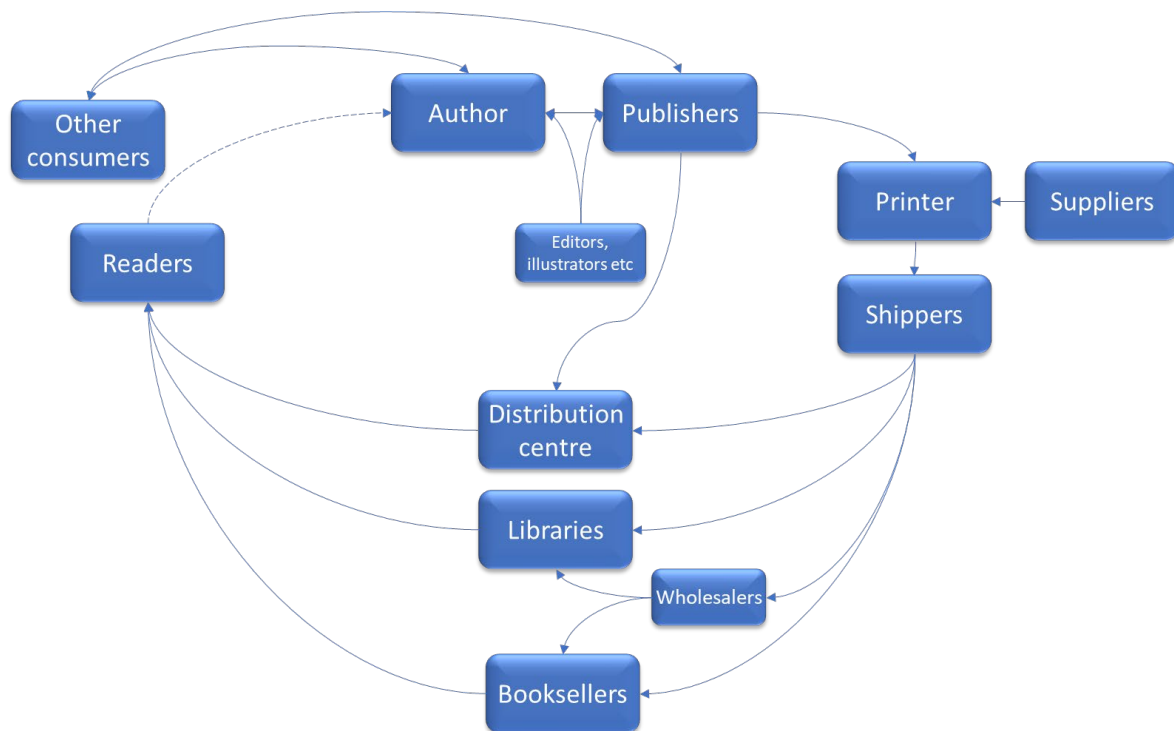


Figure 1: The traditional distribution chain

Both the supply-side and the demand side are discussed below.

2. Supply-side Issues

In general, economic theory the supply-side refers to the production or manufacture of goods and services. According to supply-side economics, when a motive, driver or incentives are provided more goods will be produced. In most cases profitable remuneration would be the driver.

1. Writers

However, in the publishing sector the supply-side begins with the creator, writer or author of the publication. When a book or publication is in demand, greater numbers are printed and the marginal costs for the publication comes down. This leads to increased profits for the publisher and increased royalties for the creator of the work.

Unfortunately, the South African market is very small and has many languages (see section below??). There is also competition from foreign publishers and importers. This puts South African authors at a great disadvantage in that it is difficult to find enough buyers for their books. In economic terms there is a long tail. A few successful authors make a lot of money and are able to write fulltime but the overwhelming majority of the authors, even those that make it to print, are unable to sustain themselves from writing only. This is exacerbated where authors write in languages other than English (although when considered from a financial point of view there are a few successful Afrikaans authors).

The figure below shows the long tail. The creators in the green section are able to make a living from the writing. The authors and the yellow section find it difficult if not impossible to make ends meet from their writing alone.



Number of authors arranged from most successful (in terms) of sale to least successful

Figure 2: Long tail graph

Source: https://en.wikipedia.org/wiki/Long_tail#/media/File:Long_tail.svg downloaded 25 November 2021

With 11 official languages, South African authors battle to break into the green area. Books written in languages other than English have a very small international market and therefore even trying to exploit this is difficult.

2. Publishers

Publishing is a critical part of making creative products including books available to the public. Generally, publishers are responsible for the production of the book including the printing, editing, illustrating, and layout etc. Publishers also the gatekeepers. Many successful authors initially found it difficult to find a publisher that was willing to take on the work. It must however be pointed out that many publishers have their own creative teams and not all writers are freelancers. In South Africa, publishing focuses on three broad markets:

1. Educational (schools);
 - Trade or general publishing; and
 - Academic (higher education).
- The publisher fulfils three basic functions:

1. Decides what books to publish;
- Assumes the financial risks associated the publication;
- Co-ordinates the work of all those who contribute to the production of a book

Economies of Scale

Writing, other creative content and preparation of the book before publication have a fixed cost irrespective of how many books are sold. The cost of the book also depends on the print run. The more books that are produced and sold, the lower the average cost per book will be. These are generally referred to as economies of scale that are cost advantages reaped by publishers when production becomes efficient and is generally achieved by increasing production and lowering costs.

Consumers will benefit from greater supplies of goods and services at lower prices, and employment will increase.

Unfortunately, the South African market is very small, and the number of languages makes the market for individual works even smaller. This makes it particularly difficult for publishers to achieve economies of scale.

Structure the Publishing Sector in South Africa

Le Roux et al. (2019) estimate that there are approximately 150 publishers in South Africa. Of these 127 members of the PASA. Most publishers are small or micro businesses and have less than five staff members. The industry is therefore heavily dominated by a small group of very large publishers. These publishers represent more than 80% of production and revenue.

Transformation

Based on their survey, Le Roux estimates that only 20% of the firms are either level 1 or level 2 according to the BBBEE legislation.

BBBEE level	
Level 1	10%
Level 2	10%
Level 3	20%
Level 4	5%
Level 5	5%
Level 6	-
Level 7	-
Non-compliant	50%

Table 1: BBBEE level

Source: Le Roux et al. (2019)

The majority of new additions in African languages were produced by the education sector. Le Roux points out that: “[t]he increased new digital editions in these languages are likely a result of increased focus on the development of African language digital publications in this [the education] sector. The data indicates a rise in the publication of African languages, although these are still underrepresented.”

3. Physical Production

The printing and publishing sector has been in steady decline since 2008.

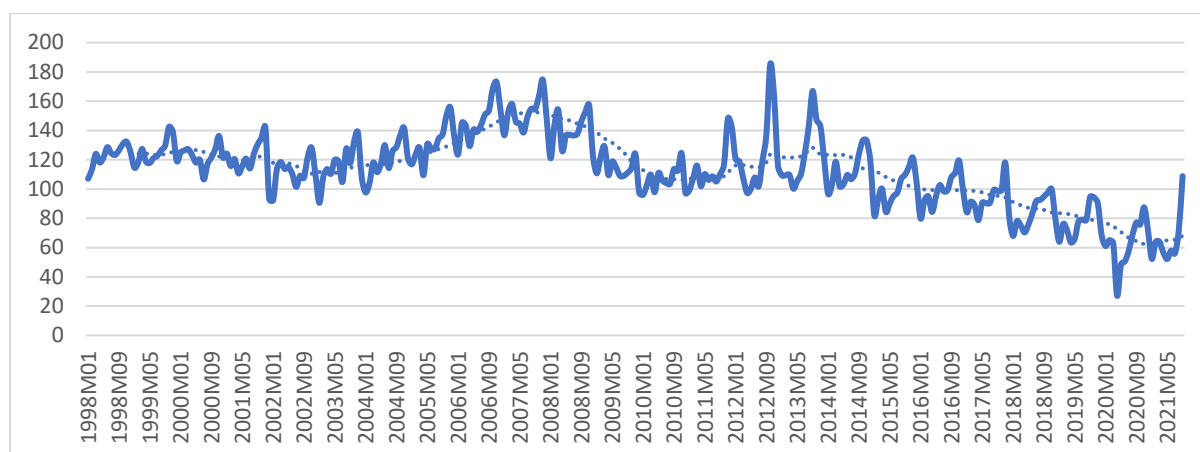


Figure 3: Physical output of the publishing sector

Source: Stats SA

What is noticeable from the graph is the seasonal trend. There are generally larger purchases during December and January of each year, firstly because of Christmas shopping and secondly, because of schoolbooks been purchased.

There are three particularly large “spikes” in 2011, 2012, and 2013 where the new syllabuses required the purchase of new books for schools.

There is also a sharp drop in April 2020 that can be ascribed to the COVID-19 pandemic.

Output

The above graph gives the index of the physical output of the sector. The graph below gives the output in financial terms.

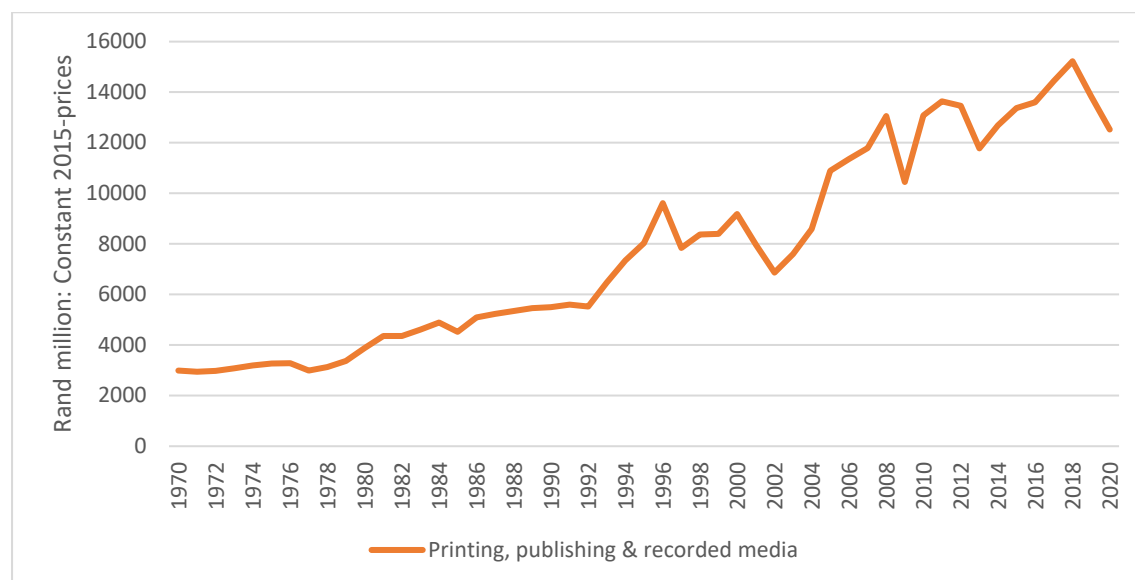


Figure 4: Output - Publishing, printing and recorded media

The same trends are evident with increased output in 2011 to 2013 and a sharp drop in 2020.

Gross Value Added

The GVA of the sector is an important contribution to South Africa’s gross domestic product (GDP). It includes the returns to the factors of production that includes compensation to employees and the profit that firms generate (which is usually measured as the gross operating surplus that includes the operating surplus less depreciation).

The table below shows the GVA (in constant 2015 (prices) for the books and press domain from 2016 to 2020.

Table 2: GVA at basic prices per domain (Constant 2015 prices, R millions)

Books and press	
2016	R 17 692
2017	R 17 754
2018	R 17 231
2019	R 16 728
2020	R 14 420

Source: Own estimates based on Stats SA (2021) and Quantec (2021)

It is clear that since 2016 the sector has been under pressure and has been losing ground. However, the COVID-19 induced recession saw a battling industry come under further pressure.

SACO (2021) found that the recovery trajectory of the books and press domain was an L-shaped recovery that is longer and slower than the other domains in the cultural and creative industries (CCI).

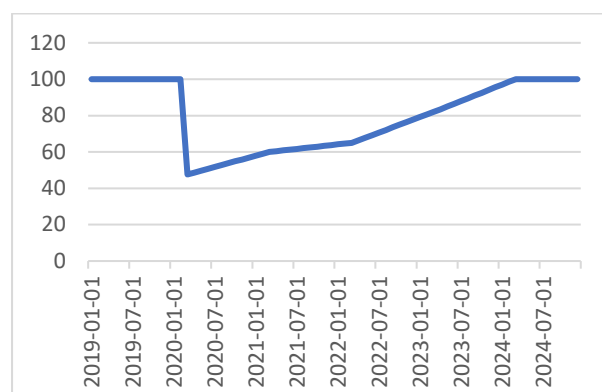


Figure 5: The expected post-Covid recovery path

Employment

Although the content creators or authors play a critical role, and without which there would be no publishing sector, there are a number of other role players as well. As a whole, the sector employs mainly highly skilled and unskilled workers. There are a number of low-skilled workers as well as informal workers that also contribute to the sector.

Table 3: Skills levels per domain according to total compensation

	Skills levels according to compensation
High-skilled labour	39%
Skilled labour	45%
Low-skilled labour	8%
Informal labour	7%

Source: Own estimates based on Stats SA (2021) and Quantec (2021)

As can be seen from the table below, most of the sector and its employees are based in Gauteng, followed by the Western Cape and KwaZulu-Natal. Nevertheless, the sector is present in all of South Africa's nine provinces.

Table 4: Number of workers per skill level (2020)

	South Africa	Western Cape	Eastern Cape	Northern Cape	Free State	KwaZulu-Natal	North West	Gauteng	Mpumalanga	Limpopo
Skilled	11 684	3 634	335	30	128	1 855	131	5 320	128	123
Semi-skilled	27 788	8 588	867	93	342	5 444	537	11 136	494	287
Low-skilled	4 516	1 329	133	9	80	983	76	1 733	81	92
Informal	8 092	2 248	347	57	156	1 363	238	3 307	203	173

Source: Quantec (2021)

Capital Stock

Besides the workers, the sector also relies on capital including machinery and working capital.

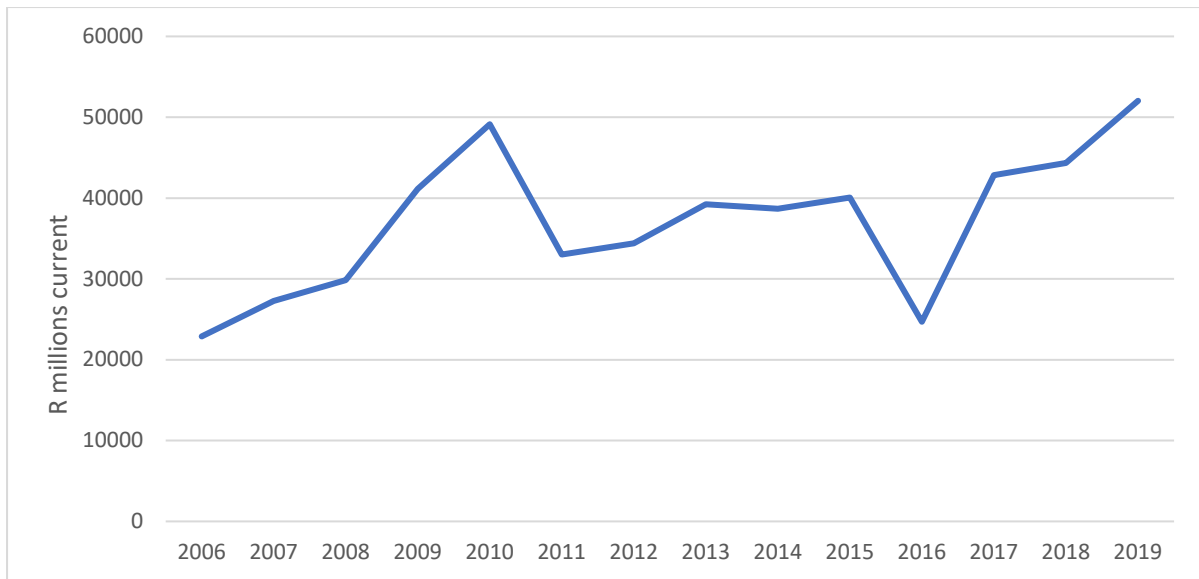


Figure 6: Total assets in the publishing sector

Source: Own estimates based on Annual Financial Statistics Stats SA (2021)

4. Royalties

Writers, as already has been explained, are critical and usually receive a royalty (depending on the number of books sold) for the intellectual property. Based on information from the Stats SA's annual financial statistics, there was a precipitous drop in royalties paid in 2016. This did not improve much during 2017, 2018 or 2019.

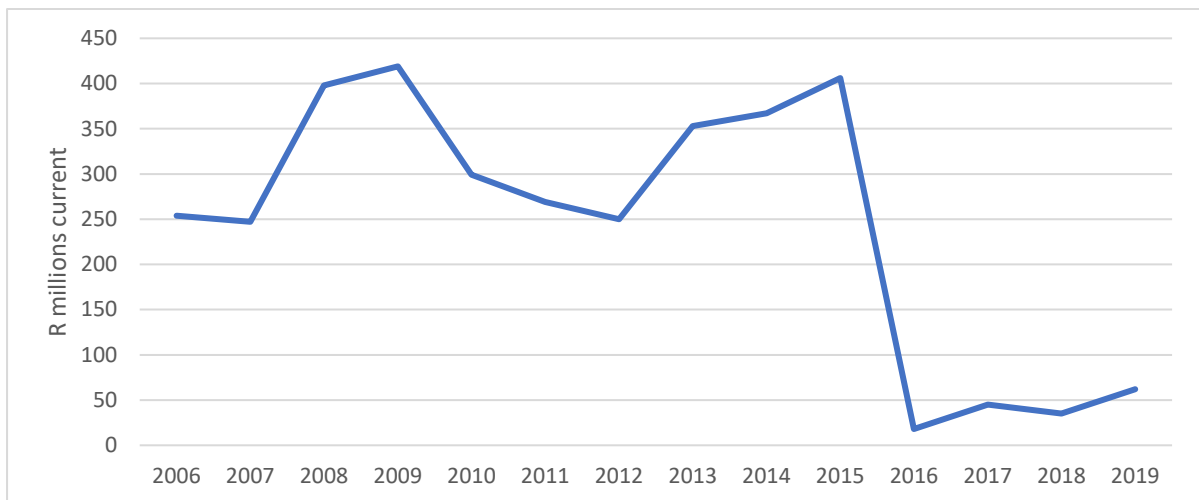


Figure 7: Expenditure on royalties and other intellectual property

Source: Own estimates based on Annual Financial Statistics Stats SA (2021)

3. Demand Side

From the analysis of the capacity utilisation, it is clear that the lack of demand is a major driver. This section will look at some of the demand side factors.

1. Expenditure at Basic Prices

The graph below shows the total output or expenditure on GDP. There is a slow upward trend albeit very volatile. This can be attributed to volatile demand for books from the basic education sector. Growth spurts are generally the result of changes in curriculum that require new textbooks.

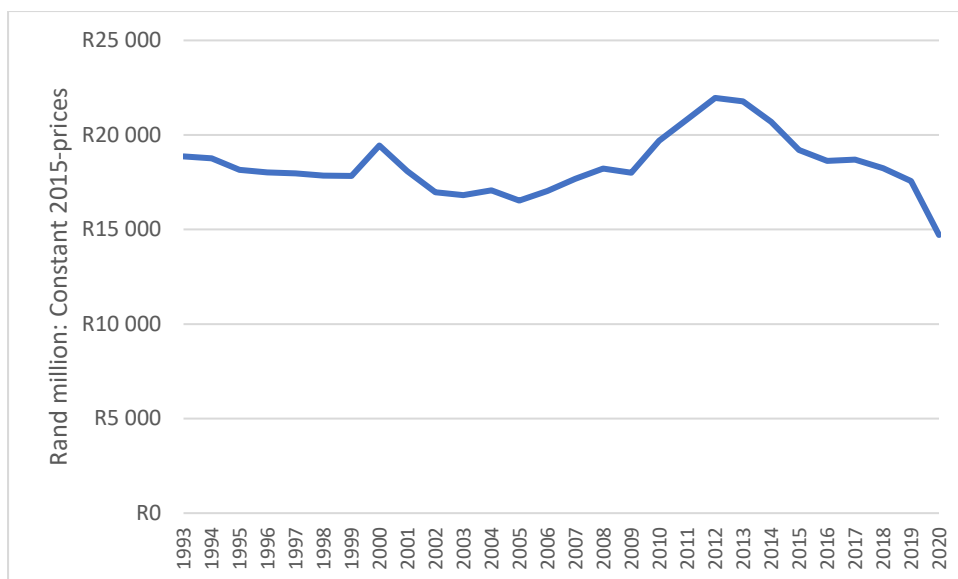


Figure 8: Gross value added (GVA) at basic prices

Source: Own estimates based on Stats SA (2021) and Quantec (2021)

The graph below shows the importance of households and government expenditure to the sector.

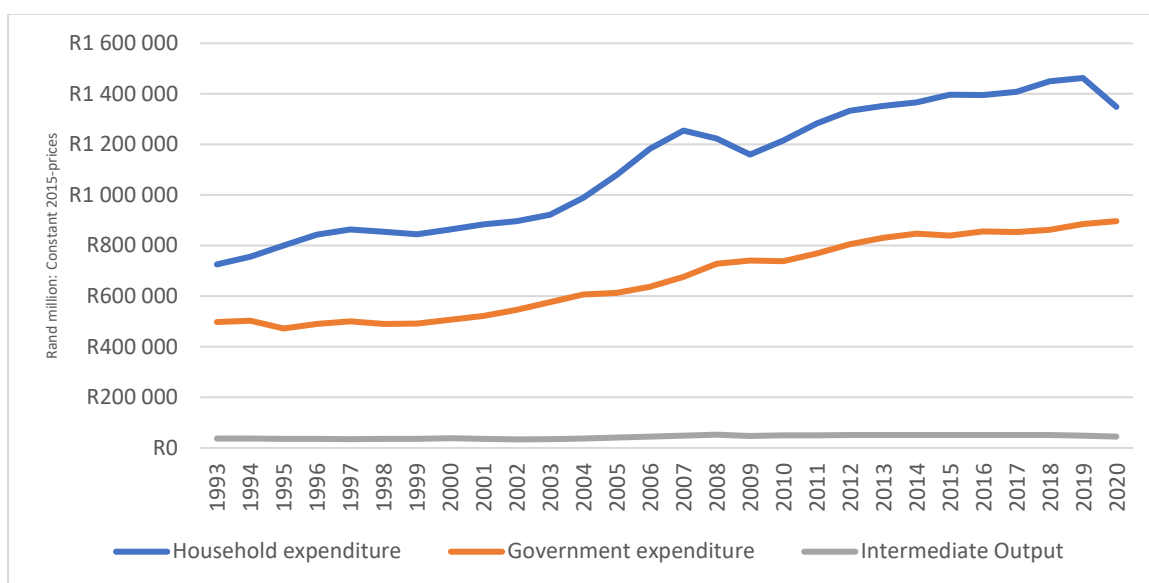


Figure 9: Expenditure at basic prices

2. The Publishing Industry Sub-sectors

The publishing industry involves the editing, proof-reading, the layout and designing, producing the artwork, indexing, and translating. In South Africa the publishing industry sub-sectors can further be divided into three main groups:

1. Academic;
- Trade; and
- Education.

The size of each is shown below.

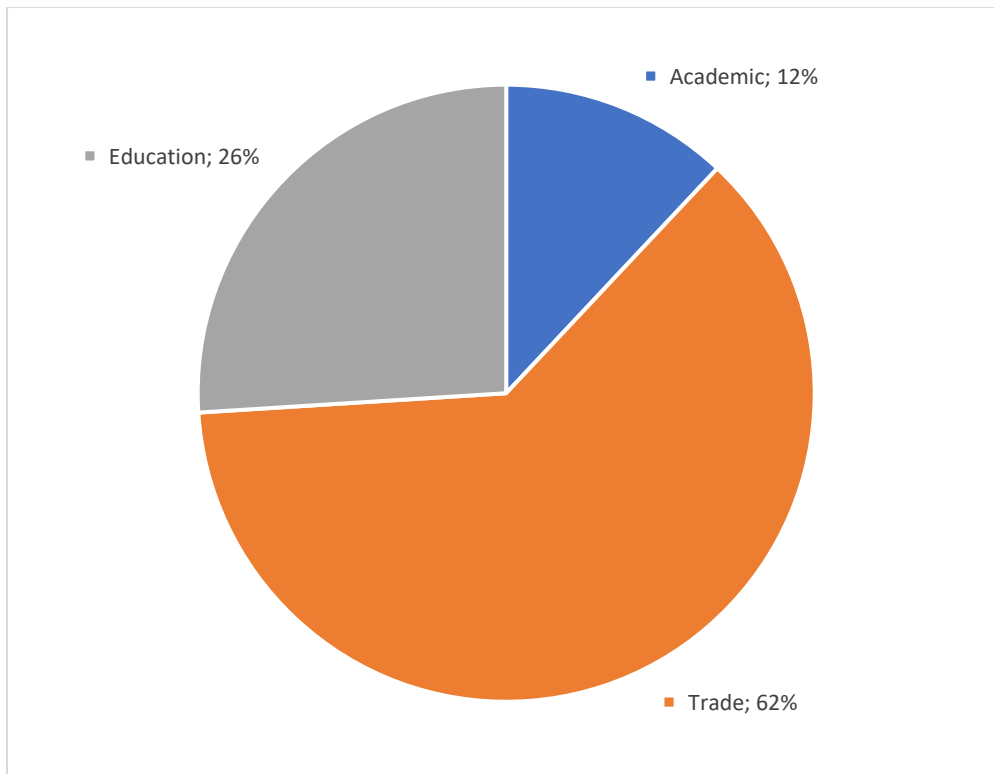


Figure 10: Publishing sectors in South Africa

Source: Le Roux et al. (2019)

According to Le Roux et al. (2019) the sector is comprised of largely the educational market. This presents a problem because volumes depend heavily on government purchasing for schools.

Although there are sub-categories and areas where the sub-sectors overlap, the areas have different markets and often different creatives that are involved.

3. Physical Volume of Printing Production Relative Total to Manufacturing Production

The graph below shows the physical volume of printing production relative total to manufacturing production.

Unfortunately, this downward trend since 2009 is downward. The other graphs below show similar trends.

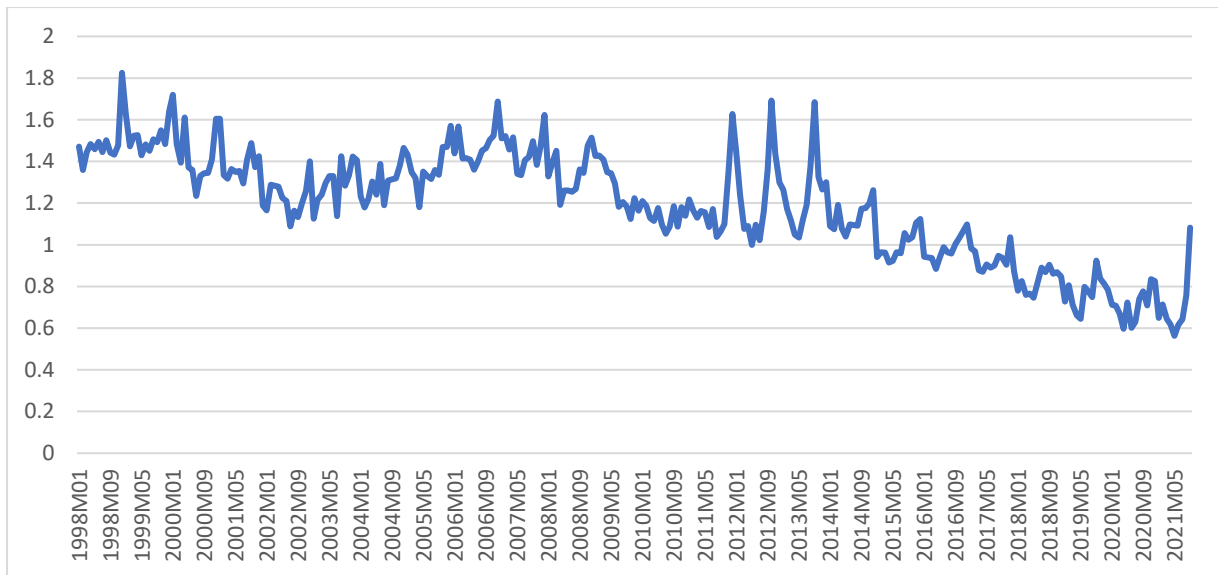


Figure 11. Physical volume of printing production relative total to manufacturing production

4. Newspapers and Periodicals

The two graphs below show the circulation statistics for printed daily newspapers and weekly publications.

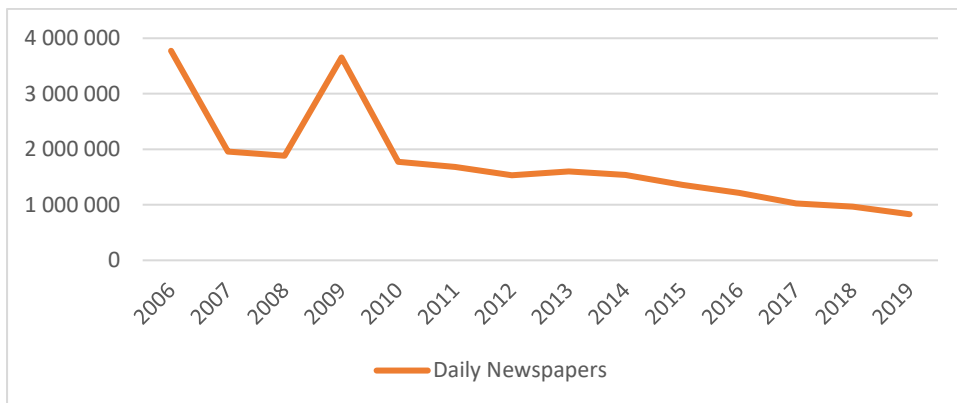


Figure 12 Circulation statistics for printed daily newspapers

Source: www.abc.org.za/ download 25 November 2021

Again, the downward trend since 2010 is evident.

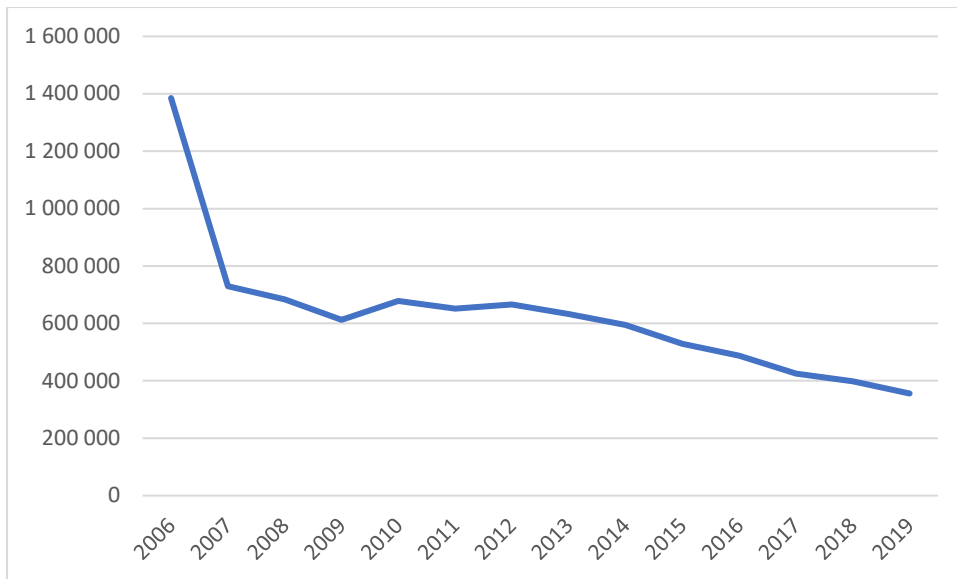


Figure 13: Circulation of weekly publications

4. Capacity Utilisation

Firms, including publishers, seldom operate at full capacity. From the graph below, it can be seen that publishers are using marginally less of their capacity over time. Post-Covid figure so that the sector is only using 75% of its full capacity, where 90% capacity utilisation is not unexpected. The sector can therefore grow by at least 10% without additional investment in new capital

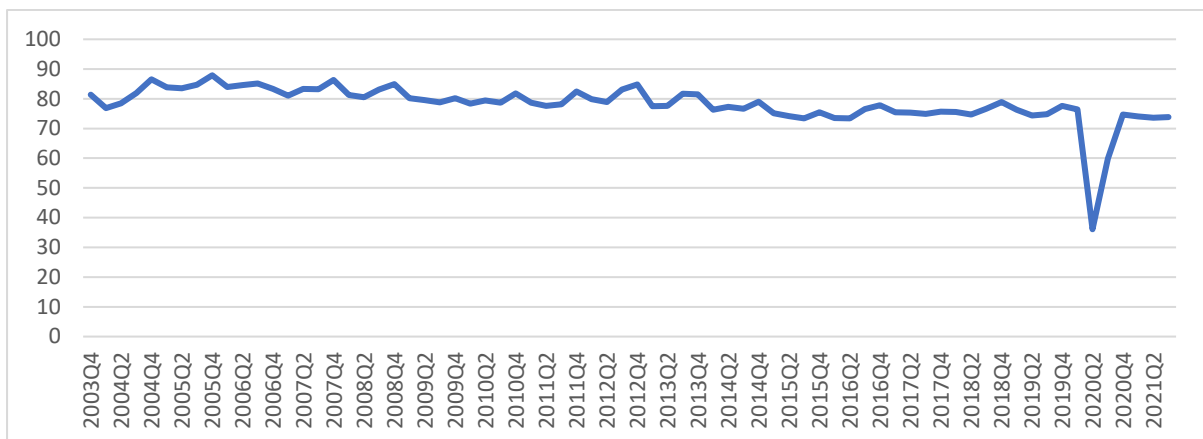


Figure 14: Capacity utilisation

Source: Own estimates based on Stats SA (2021) and Quantec (2021)

There was a significant drop in capacity utilisation in the second quarter of 2020 due to C-19.

The graph below shows reasons for the unutilised capacity. The largest problem is the lack of demand it contributes to approximately 15% of total capacity. This again reiterates the ability of the sector to grow by at least 10% without additional investment. COVID-19 was also responsible for the spike in spare capacity in the second quarter of 2020.

It seems as though very little of the underuse of the sectors capacity is due to the lack of either skilled or highly skilled workers. Neither is access to raw materials a major contributor in any way.

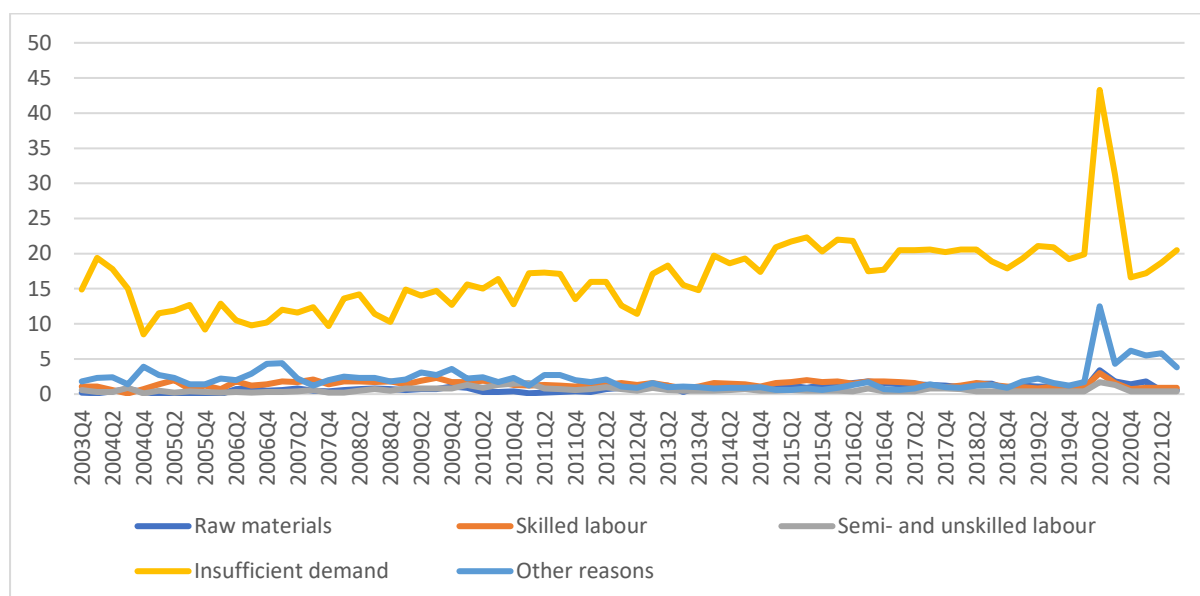


Figure 15: Reasons for unutilised capacity

Source: Own estimates based on Stats SA (2021) and Quantec (2021)

5. Inflation

Inflation³ refers to a general progressive increase in prices of goods and services in an economy. With price level rises, each unit of currency buys fewer goods and services and leads to a reduction in the purchasing power of money. Inflation also influences the cost of manufacturing goods and services. There are several measures of the price level including the Consumer Price Index (CPI), the Producer Price index (PPI) and the GDP deflator. These are broad or weighted average price indices.

Prices will not all increase at the same rates. Each component of the “basket” can have its own inflation. The amount of each product or service demanded depends on the various elasticities. (Elasticity measures the percentage change of one economic variable in response to a change in another.) If the price of a good or service rises (generally relative to other goods or services), the demand for that good or service would be expected to drop. How much demand drops (if at all) depends on its elasticity.

Graphical depictions of South Africa's CPI level and the CPIs of Recreation and culture, recreational equipment as well as books, newspapers and stationery are presented in the graph below. The prices of recreation and culture, and recreational equipment have generally risen slower than South Africa's inflation rate. The prices of books, newspapers and stationery on the other hand have risen slower. Indeed, the price levels for books, newspapers and stationery have generally declined since 2002.

³ There is also deflation where the prices generally drop. For the purpose of this section price changes will simply be referred to as inflation.

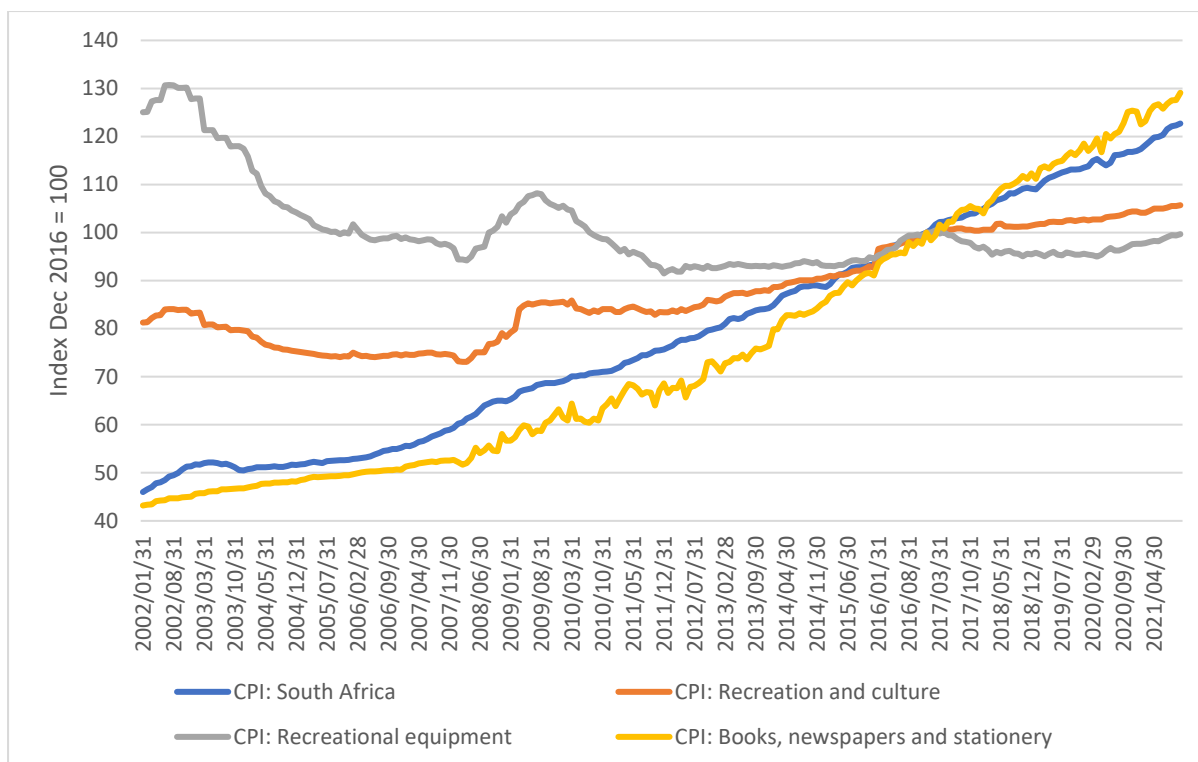


Figure 16: South Africa's CPI and CPI of selected CCIs

Source: Own calculations based on Stats SA (2021) and Quantec (2021)

When disaggregating books from newspapers and periodicals, the drop in price of books is a main contributor.

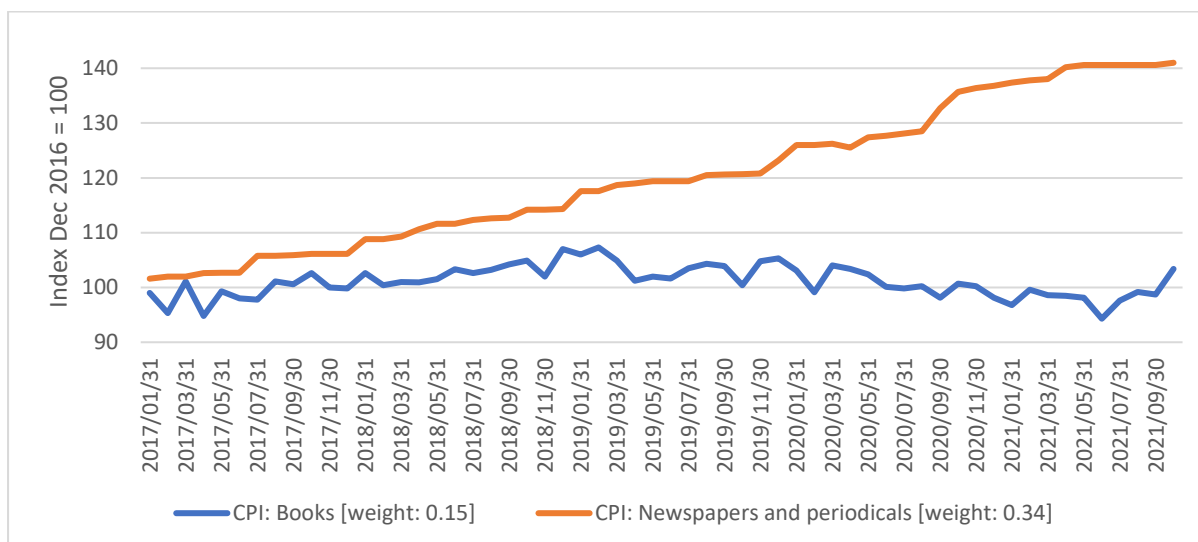


Figure 17: CPI of books and newspapers and periodicals

Source: Own calculations based on Stats SA (2021) and Quantec (2021)

1. Trade

South Africa is not a major player in the book sector internationally despite having had two Nobel prize winners, literature and many other well-known or acclaimed authors.

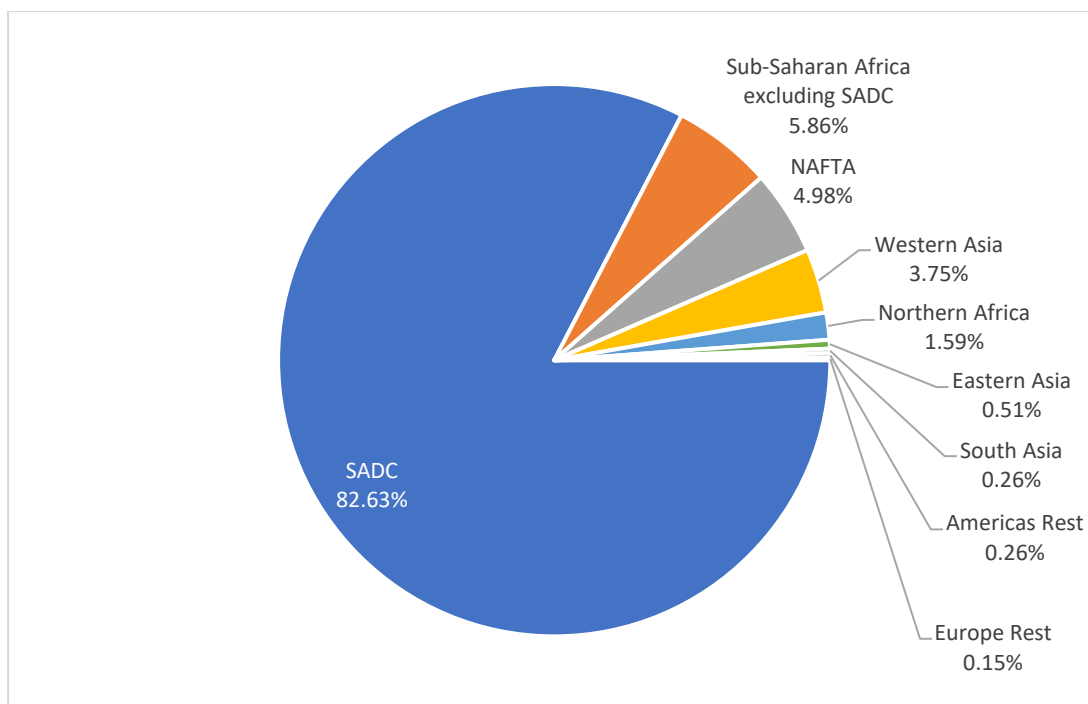


Figure 18: Export markets for South African publications in 2020

As can be seen from the chart above, the Southern African Development Community (SADC) is a country's biggest market. It is also a natural market that can be exploited further.

The table below is the indication of the products that are been exported by the sector. Just over two thirds of South Africa's exports of books.

Table 5: Export of specific goods

Product	R million	%
Books, brochures [HST4901]	1 088	64.85
Printed matter [HST4911]	313	18.63
Registers, notebooks, binders, [HST4820]	283	16.87
Prepared unrecorded media [HST8523]	178	10.59
Newspapers, journals & periodicals [HST4902]	72	4.31
Transfers (decalcomanias) [HST4908]	61	3.62
Calendars, calendar blocks [HST4910]	16	0.97
Mach etc. NESOI for typeset, m [HST8442]	15	0.91
Printed or illust post cards, [HST4909]	14	0.81
Children's picture, drawing etc. [HST4903]	5	0.27
Music, printed or in manuscripts [HST4904]	3	0.17
Maps & hydrographic charts etc. [HST4905]	2	0.13
Total	1 679	100.00

Source: Quantec (2020)

The Publisher's Association of South Africa (PASA) with the support of DSAC should approach the Department of Trade, Industry and Competition to form an export council with the objective of developing and implementing an export development and promotion strategy.

2. Registered Number of Vendors Registered for VAT

The number of registered number of vendors registered for VAT gives an idea of how formal the industry is. There number of vendors from the paper, printing and publishing sector represents 0.8% of all vendors and collects 0.84% of VAT revenue.

Interestingly, the VAT collected from the paper, printing and publishing sector on imports is 1.5%. This would seem to indicate that the sector has a propensity to import.

According to SARS and the National Treasury there were just under 450 000 vendors registered for VAT. Of these only 3 610 were from the paper, printing and publishing sector. The graph below shows how these changed over time.

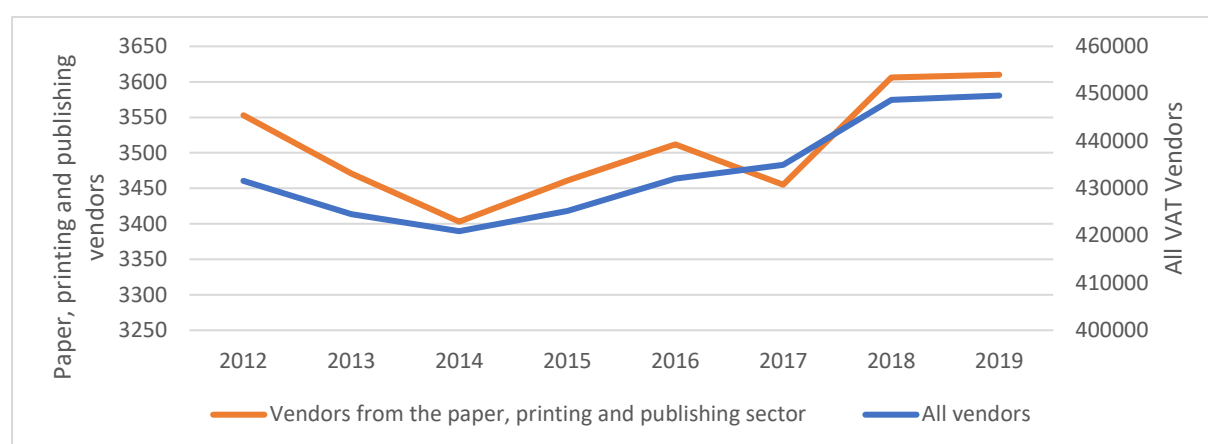


Figure 19: Number of VAT vendors

Source: Quantec based on SARS and the National Treasury

The VAT collected on publishing vendors is shown below.

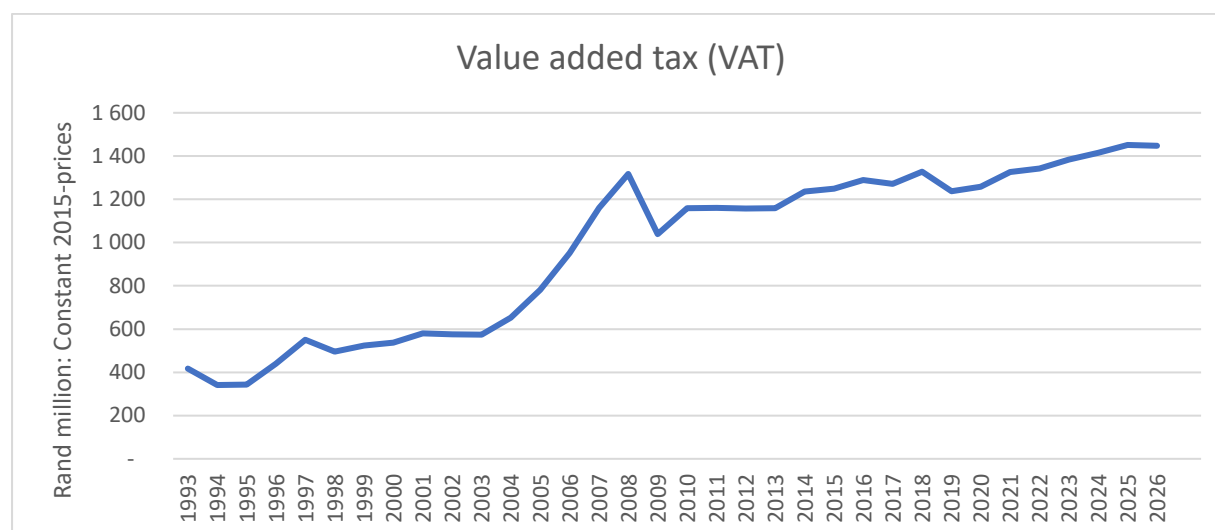


Figure 20: VAT Collected in South Africa

Source: Quantec based on SARS and the National Treasury

6. Trade

As discussed above, the marginal cost of books is low and therefore inter-industry trade can be expected.

1. Imports

Imports are coming into South Africa both from foreign publishers with mainly foreign authors, but also some South Africa authors. However, of concern is the fact that publishers are starting to publish their books in foreign countries because they are too expensive to print locally. This could explain the spike in imports in 2016.

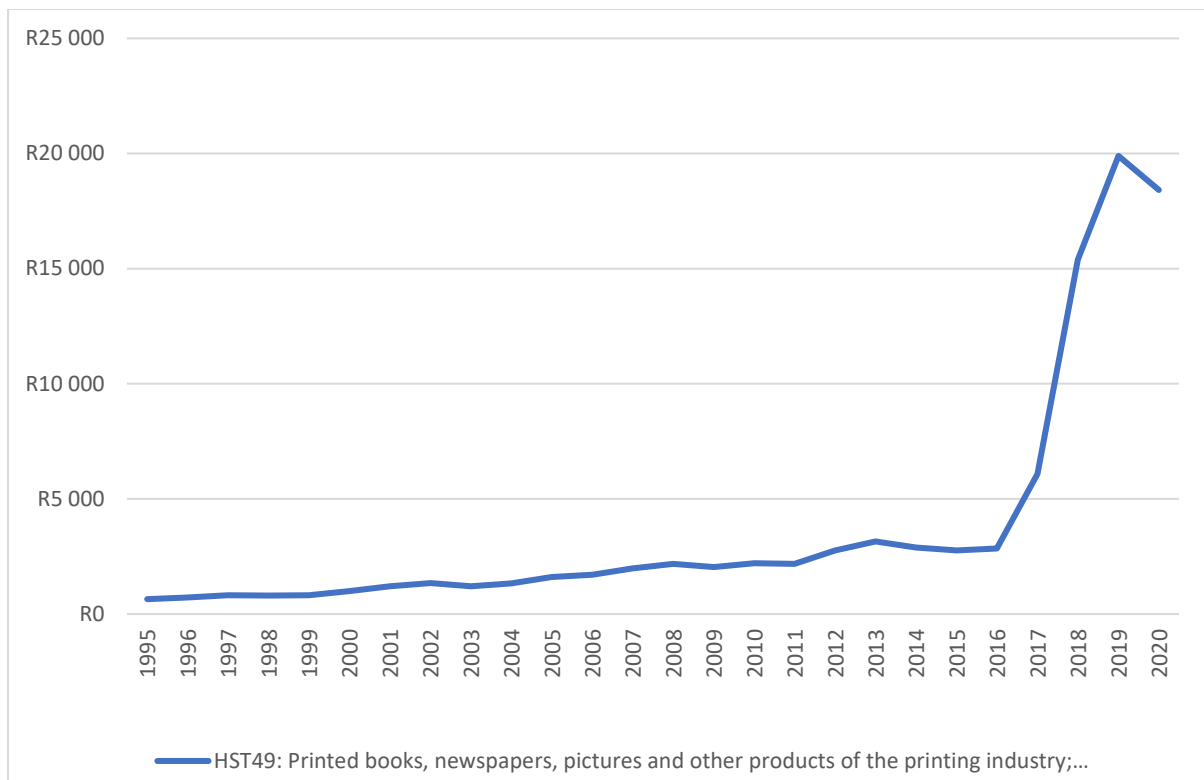


Figure 21: Imports into South Africa

2. Export

Exports are increasing and especially to the African market. Other markets are very small.

This would seem to indicate that more efforts should be placed on exporting to African countries, especially Anglophone Africa.

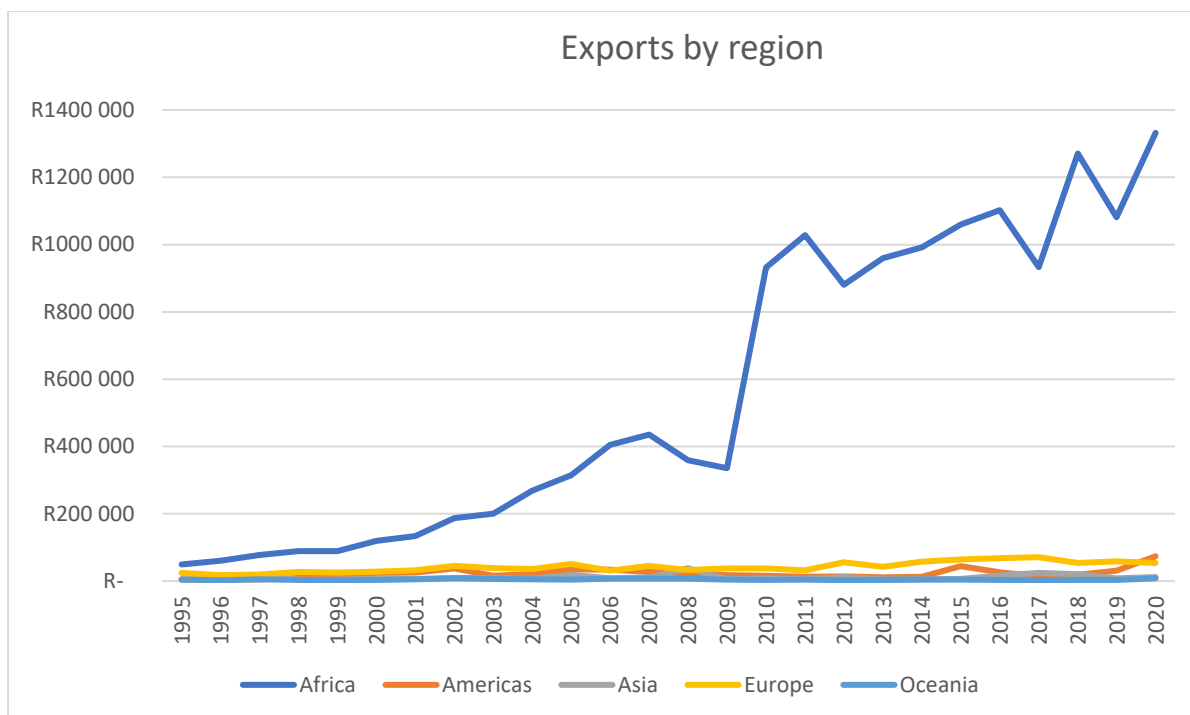


Figure 22: Exports from South Africa

7. Reading in South Africa

Without readers, they would be no publishing sector. The number of readers and the propensity to read influences authors to write and publishers to publish. Reading is not only about entertainment. There are unseen benefits such as improved memory, focus, and concentration. The virtuous circle below shows how reading encourages further reading. According Nuttall (1996) (quoted in Azari (2000, p. 68)) students should enjoy learning and presents a “virtuous reading circle” to promote the use of extensive reading.

Although Mlachila and Moeletsi (2019) found that South Africa had progressed in basic and tertiary education enrolment, the country still has significant challenges in the quality of education. Mullis et al. (2017) found that 78 per cent of South Africa’s Grade 4 learners could not meaningfully read in any language. Kenya, Swaziland, and Botswana out-ranked South African learners in reading. PIRLS (2017) also noted that South Africa’s average reading score for grade 5 scarcely changed between 2011 and 2016.

The average scores are bad but inequality in schools exacerbated these results. Isdale et al. (2017) found that the average reading achievement in schools with the largest libraries was 525, compared to 494 to 501 for schools with a smaller or no central library.

It is important therefore that a nation reads. This reading is inculcated in children from a very young age. In South Africa, this reading culture has not been developed. Very few parents or guardians read to their children. In some cases, especially in the past, parents themselves were not able to read. However, today a far more fundamental problem is at play.

Telling stories with a child

Reading books with a child

Never	35.1%	46.8%
Sometimes	31.4%	26.2%
Often	33.5%	27.0%

Table 6: Type of early childhood development (ECD) stimulation for children aged 0–4

Source: Stats SA (2019) ⁴

Clearly, for the South African book and publishing sector to grow significantly more readers and the increased propensity to read will have to be developed. Readers do have many challenges on their time and have many alternatives other than reading. Technology is making it easier to write, edit, or to produce books it is also easier acquire books either through online purchases of traditional paper books or e-books. Technology is also responsible for providing many alternatives to reading. These trends are and their implications for the publishing sector discussed below.

Language

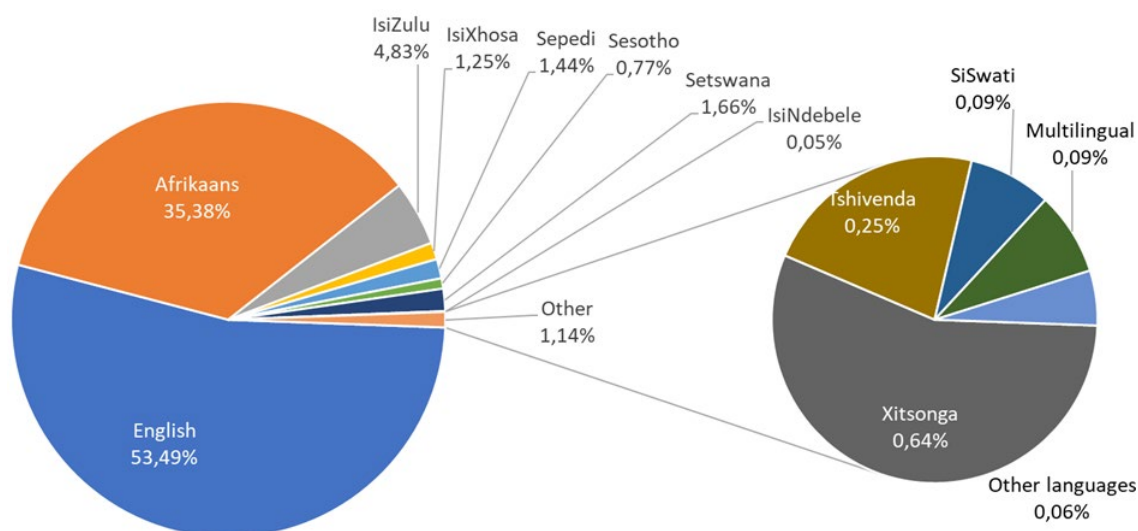


Figure 23: Publishing in South Africa's Official Languages

Source: Le Roux et al. (2019)

⁴ <http://www.statssa.gov.za/publications/P0318/P03182018.pdf>

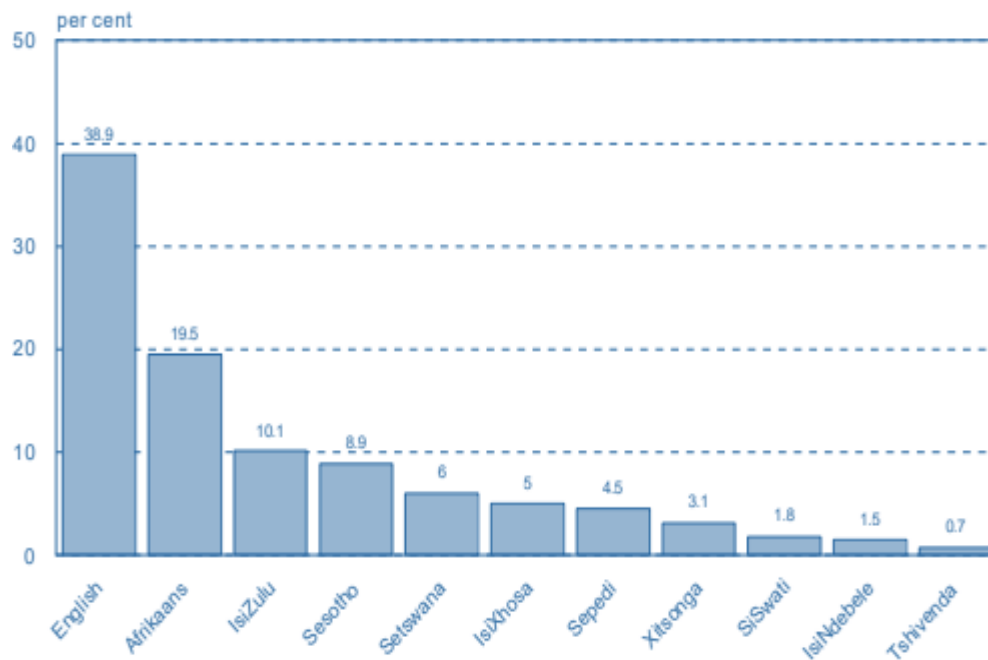


Figure 24: Among those who speak more than one language at home, percentage of people speaking each official language as their second home language

Source: Simelane (2002)

8. Conclusion

South Africa has an establishing publishing sector with a long history. The sector has a number of challenges that are being overcome. Nevertheless, the sector has been on a downward trajectory for a number of years. This includes newspapers and periodicals. More South Africans are consuming news content online either for free (paid by advertising generally) or via subscription.

It has not been possible to determine the extent to which South Africans are consuming international content, but local content providers are now facing international competition that may eat away at their market share. Further it is not possible to determine imports of e-Books. In this regard SACO has commissioned a report "A feasibility study on a state-owned publishing house and an online book purchasing portal" that may shed light on these issues and propose solutions.

South Africa does not have a reading culture. There are many causes. Unless a reading culture develops and there is an increased appetite, especially for books written in African languages, there will not be a market for South African books.

Although there are new authors, with more representivity and author, the change is slow. The diversity of languages remains skewed towards English and Afrikaans, and that the diversity of readers and book buyers is limited.

3. Emerging and Possible Future Trends

As discussed above, books are facing increasing competition. In Maher (2019), the Serial Box co-founder and chief content officer Julian Yap is quoted as saying that “TV is crushing the book world. Forty-five million people read more than 11 books a year in America, vs the 90 million people who read one to 11 books a year, and the rest do not read any. Whereas television is hundreds of millions of people.” He does go on to say “We are all human. Whether you want to call it entertainment or art, we’re all contributing to the culture.”

Balis (2020) asserts “[s]torytelling must remain paramount. But combining creativity with data allows us to explore the experience in its many forms and still understand the strategy holistically. Data will play an ever more influential role as the complexity of the consumer landscape unfolds. Data unlocks key insights, putting the human experience at the very core.”

1. New Technologies

Digital technologies have been around for decades in the form of tools used in publishing-related tasks such as writing, proof-reading, translating, illustration, layout, and printing. Heraclitus is reported to having said “There is nothing permanent except change.” With improved technology, infrastructure and increasing digitisation has led to the publishing industry undergoing rapid and far-reaching changes. Nevertheless, with the increased influence of social media example, influence on what content is sold and read, and even on the very act of reading, is a more recent.

Amazon, e-Readers, and tablets have redefined how books (or content) are consumed and causing massive disruptions in the publishing industry. It is anticipated that this trend will increase. However, books like Harry Potter, The Hunger Games or A Song of Ice and Fire (Game of Thrones), demonstrate that print media are not dead or even in critical care, it just needs some accompaniment (Karan, 2017). From interviews with books stores, this has been confirmed and there is even an uptake in reading paper books especially by young adults.

The omnipresence of mobile devices and internet connections means that consumers are now exposed to a wide range of easily accessible content that seeks to attract and hold their attention. This has, to an extent, led to, the devaluation of books as a source of access to knowledge, entertainment. Business models have provided services and content to consumers for free, with advertisers indirectly sponsoring them. It will be a challenge to convince these consumers to pay the full value of the content, if at all.

With improved broadband, media publishing, content stories and the art of journalism will be intertwined with machine learning, automated technologies and personal mobile device technology (Hoffman, 2017).

Developing and Evolving Technologies

Given the technologies that are developing and evolving, digital content areas such as self-publishing, the loan of e-books in libraries, e-reading subscription services, and enhanced books and apps appear to be particularly promising for the industry sector right now. E-books can now be read on a large variety of devices.

“Not a magazine, not a website, not an app, but an experience, an influence, and a community. The media will continue to be accessible in many channels, allowing access at any time, any day”(Graziano, 2017).

2. Reading Material

Books play an important role in social relations and is also evident from bookshops, cinemas, theatres, museums. We are always supported by authors, booksellers, librarians, schools, colleges and many other institutes of excellence. Their support helps us to continue to share good stories and content (Seshadri, 2020).

Political Non-fiction

According to Maher (2019) highlights the trend that politics has taken over the nonfiction bestseller lists. These are generally dominated by mostly partisan political books and some memoirs that speak to why what happened, happened. It is really hard to launch other books “amid the noise of all the anxiety and discord around our country’s political dynamic. I think it is tough to work in publishing now. Hopefully that’s just an aberration, but it’s hard to say.”

Children’s Books

Although there is a desire for really warm, timeless, happy-making fiction, it does not always sell. Even if authors or illustrators are amazing, they may not reach the New York Times list unless they are more traditional. However, according to Emily Feinberg, in America, publishers are starting to introduce diversity initiatives and are promoting authors of colour over white male authors. LGBTQ stuff is getting more attention, which is great, but obviously it could get a lot more—and there are politics within that space in the children’s world, too, because of people deeming what’s appropriate for kids and what’s not.” However, she adds, children’s publishing professionals ultimately all share the same goal: “We all want to make sure that kids have access to books that they need. And I think the political climate has forced us to really look at ourselves a lot, and very closely” (Mohsin Hamid, 2019).

Short Stories

Short books or serialised fiction may help keep people’s attention as attention spans shorten, and that could bring in some lost, or new, readers. Abbe Wright says that “In that way, some really small novels can make it to the forefront” (Mohsin Hamid, 2019). Similarly, serial fiction digitally in an episodic, season-based format similar to many television shows are doing well although there is some criticism that “Streaming has changed everything.” The opinion is that literature should not be seen only as entertainment. Streaming destroys art, and then replaces it with entertainment.

Publishing of books is generally geared for avid reader and not for the light reader. These avid readers determine the bestsellers. Julian Yap in Maher (2019) states that “he wants to see people talk about ‘binge reading’ rather than ‘binge watching.’”

Academic Books

Academic textbooks, journals and other scholarly work, including conference proceedings, play an important role in academic information exchange. South African universities are partially funded according to the number of publications they produce in accredited journals, such as the Thomson Reuters indexed journals. According to Tomaselli (2018) this tends to exclude some journals. Independent titles particularly suffer from these publishing incentives. Tomaselli (2018) states that “South African university administrations are obsessed with their faculty publishing in so-called ‘accredited journals’”. Universities therefore exhibit rent-seeking behaviour to a certain extent.

Many South African journals are now published by international publishers, some who have of whom have branch offices in South Africa. There are however a few publishers of scholarly

works in South Africa. A list compiled by Van Schalkwyk and Luescher (2017) is presented in the table below:

SCHOLARLY PUBLISHER	PUBLICATION TYPES				OPEN ACCESS	
	Academic	Trade	Journals	Textbooks	Other	yes/no
Fort Hare University Press				x		no
Pretoria University Law Press	x			x		yes
UCT Press	x		x			yes
Unisa Press	x	x	x	x		no
University of KwaZulu-Natal Press	x	x	x		x	no
Wits University Press	x	x	x		x	no
African Minds	x	x				yes
HSRC Press	x	x				yes

Table 7: Scholarly publications in South Africa

Source: Van Schalkwyk and Luescher (2017)

Audiobooks

Audiobooks have been buoyed by the podcast craze. However, audiobooks are seen another way people can read a particular title going the way of e-books. It seems therefore the audiobooks are not necessarily the answer to boost sales.

Newspapers

Across the globe newspapers are ceasing to print physical copies and going totally online. Although it has been foretold that print publishing may be extinct in 10 years, it does not mean publishing is dead. There will always be news. There will always be people wanting to be informed. Therefore, there will always be a need for people to write and publish content. The quality content has become more important because digital publishing and news consumers can get content from across the globe. The quality journalism and distinctive articles will be vital. Sophisticated internet search engines will penalise poor content and may even brand it as spam. Publishers will need to supply content of only the very highest calibre (Nuttall, 2017).

3. New Business Models

It is conceivable that the entire publishing ecosystem will undergo disruption. Publishers must take note of these factors and prepare accordingly. Successful publishers will adapt quickly to everchanging economic environment as the markets shifts rapidly in an unpredictable landscape. They need to differentiate themselves from their competitors. Whistler and Harrison (2020) hold that if media and entertainment executives do not reinvent their business, over a third will no longer exist in five years. Traditional business models that can no longer be relied upon. Technology is forcing change. There is already increasing fluidity of companies across sectors. For example, content producers are moving into direct-to-consumer distribution. Customer expectations and trends reflect the varying demands of consumers in how, when, where and how much they choose to consume and purchase. Customers are increasingly experientially driven.

The way content is consumed is changing and consumers have two broad alternatives to choose from. Firstly, the traditional model of purchase and ownership of cultural products in physical form, such as books, magazines will likely continue. Alternatively, consumers can pay for licenses to access content. As discussed elsewhere, free downloading will in all likelihood continue as well as the illegal downloading or duplicating of content.

Further the various components of the publishing value chain are threatened. One threat is the partial or full loss as intermediaries shortening the value chain. Industries previously not considered to be part of the publishing value chain including digital content companies, software developers, telecommunications operators, internet and online service providers

would add new factors and competition to consider. Publishing is an old sector and norms and standards have been around for a long time. With new actors playing a more prominent role, negotiating will change and there will be “new rules” that will guide the sector. What these will be, is difficult to say.

Technology significantly enriches the experiences by consumers of content. Technology start-ups are ideally placed respond to developing this content and also to stimulate the demand for it. Traditional publishers will have to adapt and adopt these new tactics.

E-Books

Rosnan et al. (2015) state the “[t]he prominence of e-books has prompted publishers to reconsider their distribution channels. Although print books will probably remain to exist in book industry, publishers and printers need to understand the current market changes and adapt the best way to deliver the content to readers.’

Number of Books Published

Publishing fewer books across all categories might make it easier for publishers to give more attention to the books that are released but could also result in books that deserve to be published being passed over.

Sale of Books

“Publishers will create value by curating exceptional genre content sold directly to the consumer. The next generation of book buyers were brought up on series like Harry Potter and The Hunger Games and have a deep affection for books, both digital and print. They will continue to prove the cynics, who squawk about the inevitable death of print, to be dead wrong” (Hall, 2017).

Price of Books

Section 2.5 above shows the rate of inflation of books and newspapers. The cost of books, newspapers and stationery is rising faster than other cultural and recreational goods and services. Consumers, when faced with choice of what to consume for leisure may find books pricing themselves out of the market.

More Writers

Julian Yap in Maher (2019) also wants writers to be able to afford to just be writers, and nothing else. He points to midlist authors who receive book contracts that do not provide them with enough income to earn a living, but who could write more than one 300-page book a year. Better royalties are needed for authors on both hardcover and digital sales. Royalties have been the same for decades even though the technologies have changed.

4. COVID-19

COVID-19 has had an impact on the CCIs in varying degrees and possibly the biggest global disruptor since World War II. The impact has been profound, and technology has been central to many responses. Where face-to-face interactions are necessary, such a live event, COVID-19 has had a profound impact. Companies are shifting en masse to remote working, dispersing administrative, creative and customer support into the home. This has tended to improve productivity and reduce costs. It probably is impractical and even undesirable to reverse any of these changes. It is difficult to tell what the lasting impacts of COVID-19 enforced social distancing requirements will be.

The Reader

“The future of publishing in all its myriad forms is now and forever inextricably linked to continuing advancements in technology and delivery platforms. Enabling readers to curate and consume content when/where/how they want is inexorable. Personalization will be paramount” (Dunn, 2017).

5. Market Failure

Market failure occurs when the allocation of goods and services by a free market is not Pareto efficient, often leading to a net loss of economic value. In other words, there is an inefficient distribution of goods and services in the free market. Free markets ensure that the prices of goods and services are determined by the forces of supply and demand, and any change in one of the forces results in a price change and a corresponding change in the other force. It is clear that the value that books bring to society through their stories and conveying information is far less than the price of the book.

There is no market failure in the traditional causes including market controls (usually with a monopoly or oligopoly) or imperfect market information. Nevertheless, there are positive externalities where the benefit resulting from the availability of books do affect society constructively.

In South Africa with 11 official languages, the market is too small to support writers in each of these languages. This can also be considered a market failure even though it does not necessarily fit into the traditional cause of market failure.

In cases where there is a market failure, there is a justification for government to provide support. Seshadri (2020) states that many sectors will ask government for financial support, reduction of taxes, or low-interest loans and that the publishing sector should not be any different.

The South African does already create publishing opportunities for aspiring writers, encourages the culture of reading and recognises excellence in literature. These include:

National Book Week was established by DSAC in association with the SABDC as an annual reading promotion event in 2010.

South African Literary Awards have been the principal by DSAC since their establishment in 2005. The awards were initiated by the writers' associates, which also appoints an independent adjudication committee. These awards play a pivotal role in encouraging the culture of reading and writing, recognising excellence in literature as well as developing audiences for South African literature. South African literature also stimulates interest and appreciation of our cultural products.

The Baobab Literary Journal was established in 2008 with the purpose of providing regular publishing platform for writers. The journal presents an opportunity for budding writers to exercise their writing muscle alongside seasoned writers.

The Reprint of Classics project is mandate of the National Library of South Africa promotes indigenous works. The classics are made available in the public domain through public libraries and have been reproduced and distributed to public libraries across the nation. The reprinted texts include some rare but classical works by writers such as O.K. Matsepe, D.M. Jongilanga, D.P.S. Monyaise, Sibusiso Nyembezi, L.D. Raditladi, etc.

The Indigenous Languages Publishing Programme (ILPP) is an attempt to uncover new talents and produce new material in indigenous languages in collaboration with the

SABDC initiated. The ILPP is aimed at publishing books, mainly by emerging writers, in all the nine indigenous languages.

Literary Festivals and Book Fair have been supported. These include:

The Cape Town International Book Fair, which hosts about 50 000 people in attendance;

Time of the Writer and Poetry Africa festivals, hosted in by the University of KwaZulu-Natal in Durban annually and includes participants from different countries across the world;

WordFest, a literary component of the National Arts Festival with a focus on the development of indigenous languages;

A similar initiative has been established in Mangaung, and in run alongside Macufe festival

Government's strategic goals are: effective and efficient governance and management; effective development, monitoring of curriculum implementation and support; improved teacher supply, development and utilisation; effective systems for planning, coordination, information management, assessment and district support; and improved social cohesion in schools and well-being of learners.

6. The Future of Publishing and Possible Scenarios

Forecasting is never accurate. Even when Kindle was introduced in 2007, the publishing industry was concerned and there were many predictions that digital books would replace the traditional ink on paper books. Those predictions are yet to prove correct. "Twelve years later, digital sales have receded even as book sales are stronger than ever." E-book sales have settled at a respectable 20% of the market.

7. Conclusion

EY 2020 pointed out that Media & Entertainment should focus on:

1. "Pursue operational excellence and agility; Reboot innovation strategy and approach; and Accelerate talent and skills development."

Looking towards the future, the survival of the publishing industry in general and of its individual actors in particular depends on aspects such as the ability to understand the changes that are taking place, to manage the adjustment to these changing conditions, to take a proactive role, and to directly participate in the redefinition that is taking place. Companies in the publishing industry also need to create new forms of generating income, to reassess their portfolio, to develop close ties with audiences and get to know them thoroughly through data analysis, to integrate a wide range of tools and services that will allow them to get the most out of their content in the digital sphere, to adjust prices to the needs and expectations of consumers, and to promote the results of their work, giving users reasons to be willing to pay to consume the products and services they are offered.

These are fascinating times for the publishing industry, as it negotiates its transition into the digital sphere and faces innumerable challenges and opportunities that it can make the most of in order to reinvent itself and ensure its survival.

4. Economic Scenarios

1. Forecasting

Various techniques ranging from simple desktop research, to in-depth interviews, focus groups, surveys, expert opinions or forecasting techniques (e.g. econometrics) are used (OECD, 2019, p. 2).

2. Econometric Forecasting

An econometric model is one of the tools economists use to forecast future developments in the economy. In the simplest terms, econometricians measure past relationships among such variables, and then try to forecast how changes in some variables will affect the future course of others. Econometricians make these calculations based on a generally economic model based on theories of how different factors in the economy interact with one another. National and international trends can be analysed and included in these models. Including adult literacy, South Africa's GDP, internet usage, and mobile phones per 1 000 population in a LogLog format, the following result is achieved:

Dependent Variable: LPUB

Method: Least Squares

Date: 12/13/21 Time: 04:52

Sample (adjusted): 1993 2019

Included observations: 27 after adjustments

Variable	Coefficient	Std. Error	t-Statistic	Prob.
LGDP	-0.447312	0.636526	-0.702739	0.4896
LINTERNET	-0.242596	0.109469	-2.216113	0.0373
LLIT	0.439386	0.406003	1.082224	0.2909
LMOBILE	0.246190	0.135916	1.811343	0.0838
C	4.592083	2.529531	1.815389	0.0831
R-squared	0.525169	Mean dependent var		9.876188
Adjusted R-squared	0.438836	S.D. dependent var		0.080776
S.E. of regression	0.060510	Akaike info criterion		-2.606444
Sum squared resid	0.080552	Schwarz criterion		-2.366474
Log likelihood	40.18700	Hannan-Quinn criter.		-2.535088
F-statistic	6.083070	Durbin-Watson stat		0.613475
Prob(F-statistic)	0.001875			

Although there could be additional factors that should be included because of the relatively low "R" value and the presence of Serial Correlation, it can be seen that the size of the publishing industry is negatively correlated to the GDP and the number of internet users (although the GDP is not statistically significant). The literacy rate has a positive impact and so does cell phone ownership.

Interestingly, neither exports nor the imports of publications were statistically significant and did not have an impact on the sector.

Quantec has an econometric model that was used to estimate the future of the publishing sector. A fan chart was added to show potential scenarios.

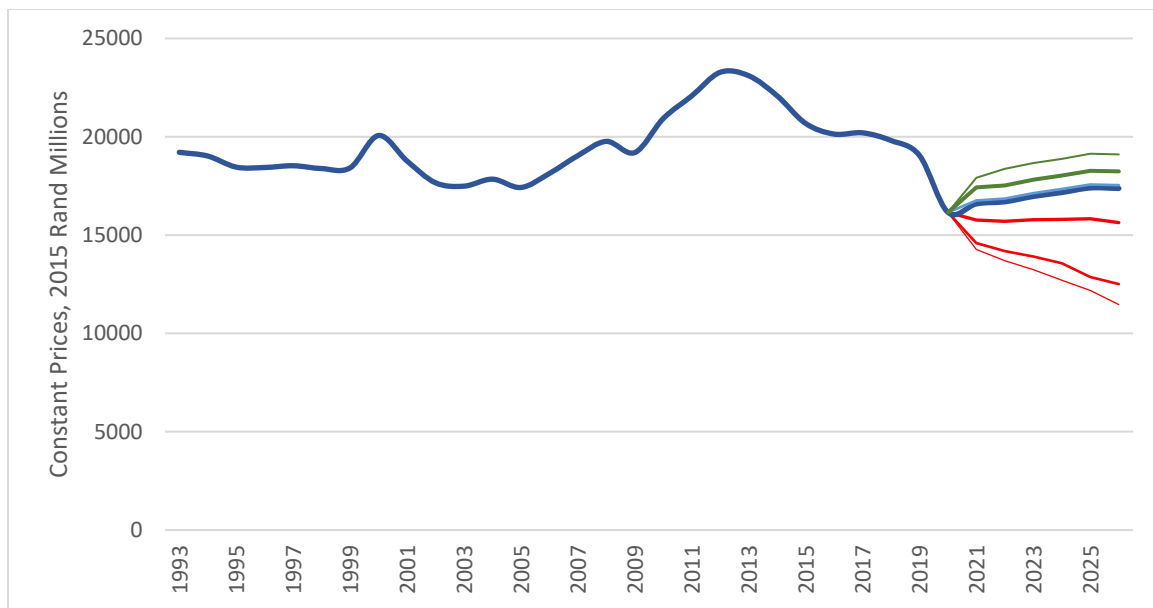


Figure 25: Econometric forecast of the publishing sector

Source: Quantec (2021)

Five scenarios are determined. The base model shows a strong decline for the C-19 induced recession of -15% followed by very slow (albeit post-recovery) growth rate of 2.7% in 2021 (which is approximately half of the expected South African growth rate). The growth rate (bold dark blue line) then slows down mirroring the South African economic performance but at lower rates.

The scenarios show an approximate 1%, 5% and 10% change from the base (both positive (shown in green) and negative (shown in red)).

3. Foresight

Foresight is not the same as econometric forecasts, futures research or strategic planning. The OECD (2019) defines strategic foresight as the structured and explicit exploration of multiple futures to inform decision making and identifies four methods:

1. Horizontal scanning involves analysing the present phenomena and identifying signals indicating the future trends;

Megatrend analysis is multi-disciplinary involving many domains;

Scenario planning develops "stories of how the future can look;

Visioning and back-casting try to identify a future state and work backwards to identify interventions that need to be taken.

Foresight programmes are generally designed to influence policy and is concerned with:

The longer-term (10 years or more); and

Alternative futures to examine alternative paths of development.

Spaniol and Rowland (2019) describe a typical scenario planning process. The process can be seen from the figure below.

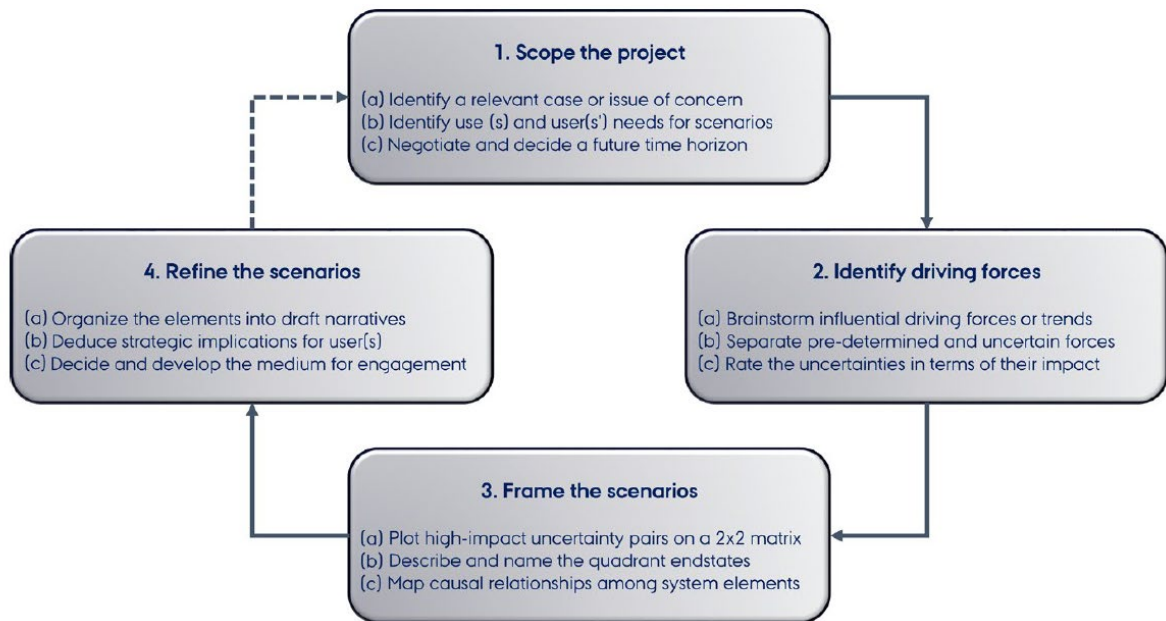


Figure 26. Intuitive Logics scenario development process

South Africa and African Scenario Exercises

South Africa has undertaken a number of scenario exercises listed below:

- 1986 **Anglo American Wack/Sunter**
 - Scenarios: High Rd, Low Rd, Cautionary Tale (Soviet Union).
- 1992 **Nedbank/Old Mutual/Perm: Tucker & Scott**
 - Scenarios: Business as Usual, Change of Gears.
- 1992 **Mont Fleur**
 - Scenarios: Ostrich, Lame Duck, Icarus, Flight of the Flamingoes.
- 2002 **SA Presidency Four Roads scenarios**
 - Scenarios: S'gudi S'nais: He Who Benz the Rules, Rules the road, Dulisanang: We are all in this together, Skedonk: It goes, but only just, Shosholoza: On the fast track.
- 2008 **SA Presidency: The Future We Chose**
 - Scenarios: Not yet Uhuru, Nkalakatha (self-confidence), Muvhango (battling).
- 2009 **Nedbank/Old Mutual Dinokeng**
 - Scenarios: Walk Apart, walk behind, Walk together.
- 2011 **ISS African**
 - Scenarios: Opportunities Lost, Politics of the Belly, Arrested Development, African Renaissance.
- 2013 **ISS SA**
 - Scenarios: Bafana Bafana, Madiba Magic, A Nation Divided.
- 2014 **SAIRR**
 - Scenarios: Rocky Rd, Wide Rd, Toll Rd, New Rd.

These types of scenarios are very useful for planning at national level or for major corporations and could be useful for the books and publishing sector but are beyond the scope of this study.

4. Expert Interviews

Expert interviews are a common method for getting a grip on the real problem area. Because experts draw on their own experience, the information they provide may often be more relevant than information literature surveys.

Interviewees were asked one question: What is the future of the book (in the broader sense) and what could be done to accelerate the good trends and halt or reverse negative trends

1. Academic Books

It seems as though the paper book will still form the basis of the teaching material. However, South African publishers cannot provide the same level of support as international publishers. The support has moved beyond providing lecturers with PowerPoint slide and a set of questions and answers to artificial intelligence and computer aided learning tools.

South African academics are asked to adapt a foreign book rather than authoring a specialised South African book. South African publishers do not have the international networks or are unable to get local books onto the global stage. There is also either the lack of desire or ability to translate into other foreign languages for the foreign markets.

2. Education Books

This is the largest section of the publishing industry and South African publishers rely on orders from government.

3. Trade Books

Christian books, especially children's' stories have been making a good showing in the USA and the UK. A local Christian publisher has established networks across the English-speaking world and books are selling well. These books have also been translated into other South African languages and especially focused on ECD.

4. Newspapers

Pippa Green

5. Libraries

Dr Marietjie Kruger

6. Editors

Aida

7. Writers

5. Conclusion

5. Three Scenarios for the Books and Publishing Domain

From the desktop research and the interviews held with subject experts, three scenarios have been developed:

1. Scenario 1: Baseline

As is evident in the econometric analysis shown in Figure 25: Econometric forecast of the publishing sector, the outlook looks bleak for the sector as a whole. In the next few years there will be minimal growth and the growth will be lower than the forecast national economic growth and even South Africa's population growth. The sector will continue to make an existence from educational books that are bought by government. This is over not a stable model has the demand for books is not consistent and changes with the introduction of new syllabi.

2. Scenario 2: Low Road

South African writers write for international publishers who use their muscle to promote the books.

3. Scenario 3: High Road

Publishers take a leadership role and promote books international especially into Africa

4. Vision

Based on the above evidence provided and the accompanying discussions it is necessary to draft a vision statement. A vision statement must be short and succinct. The vision statement must be inclusive but also focused. The vision statements above could, and perhaps should be wider and include other genre such as science fiction writing or Africa and world history. It could also include the internationalisation of work. The vision statement must be forward-looking, motivational and inspiring; but importantly must be inclusive and accepted by all stakeholders. It is therefore necessary that the vision statement be workshopped with inputs from all stakeholders.

The vision statement must inform not only the future of the book, but also how to accomplish the vision through implementation, mission, values etc.

The vision statement describes what the future of the book could achieve. The vision statement therefore should serve as a touchstone for future actions. It is intended as a guide to help all role players make decisions that align with their philosophies and goals. It can be thought of as a roadmap for the South African book sector.

Three possible⁵ vision statements are proposed below:

1. Be a leading creative and innovative African/ global society of writers, supported by the publishing industry, representing diverse cultural practices, heritage and knowledge traditions and technologies are harnessed for nation of readers;
A well-developed publishing value chain, where especially South African writers (especially those telling South African stories in South African languages) read by all South Africans for leisure and understanding; inculcating a national reading culture;
A thriving, dynamic, globally competitive and sustainable book industry that contributes to South Africans socioeconomic welfare and enjoyment of a wider global audience.

⁵ These vision statements are presented for discussion purposes and not necessary reflect the views of the authors, SACO or any other entity.

5. Mission

Similarly, the mission needs input from all stakeholders including authors (or the various associations or guilds); publishers; paper manufacturers; printers; distributors; booksellers; libraries editors, proof-readers, designers, artists, indexers and translators and importantly the readers. The mission statement could include the following elements:

- preservation, development, promotion, dissemination and consumption of South African literature in all its forms and genres;
- promote a culture of reading and writing;
- develop a sustainable book industry that supports equitable development of all South African languages;
- create an enabling environment for the mainstreaming of the arts sector as an important contributor to job creation, poverty reduction and skills development.

6. Policy Goals

The objectives would generally be:

- increasing readership;
- to introduce new methods for the teaching of reading;
- increasing publishing (including the stimulation of diversity in ownership, employment and literary product across the entire book value chain);
- to encourage literary creation;
- increasing local content (More South African books published and printed in South Africa and more South African writers telling South African stories in South African languages);
- human resources development;
- increasing access (more books made available to all South Africans in urban, peri-urban and rural areas; as well as accommodating the reading needs of people with print disabilities);
- to establish nationwide library networks;
- human resources development - to train human resources in the different skills involved in the book sector;
- ensuring that the sector increases its socioeconomic contribution to South Africa (including its contribution to economic growth, employment and equity);
- to establish an appropriate legal framework for the protection of authors' rights;
- providing a conducive environment where the South African book industry thrives and is globally competitive;
- contribute to the development of publishing clusters;
- to ensure that the South African publish sector is incorporated into the global publishing value chain;
- to provide fiscal, credit and administrative incentives for the publishing industry;
- to facilitate nationwide distribution and free international circulation of books; and
- increasing exports.

Again, these objects would be changed, added to or adapted during the consultation phases.

6. Recommendations

Publishing and printed media as an industry must achieve many objectives including increasing readership; to initiate new methods for the teaching of reading; increasing publishing (including the stimulation of diversity in ownership, employment and literary product across the entire book value chain) to encourage literary creation; increasing local content (more South African books published and printed in South Africa and more South African writers telling South African stories in South African languages) human resources development increasing access (more books made available to all South Africans in urban, peri-urban and rural areas; as well as accommodating the reading needs of people with print disabilities) to bring about nationwide library networks; human resources development - to train human resources in the different skills involved in the book sector ensuring that the sector increases its socioeconomic contribution to South Africa (including its contribution to economic growth, employment and equity); to institute an appropriate legal framework for the protection of authors' rights; providing a conducive environment where the South African book industry thrives and is globally competitive; contribute to the development of publishing clusters; to ensure that the South African publish sector is incorporated into the global publishing value chain; to provide fiscal, credit and administrative incentives for the publishing industry; to facilitate nationwide distribution and free international circulation of books; and increasing exports.

The goal of the South African Book Policy should be fourfold:

1. More South African writers telling South African stories in South African languages;
More South African book published and printed in South Africa;
More books available to all South Africans in urban, peri-urban, and rural areas; and
The reading culture across entire South African society including reading for leisure and understanding.

Reading, both the ability (literacy) and the propensity to read must be stimulated. Actions should include a "Bookstart" or "EURead" type of programme aimed at assisting parents' guardians and teachers to instil a love of reading in South Africa's youth and especially young toddlers. The programme should be coordinated by the Department of Sports Arts and Culture and supported by other relevant departments, Including the DBE and reading initiatives such as the Reading Coalition.

Given the relative strength of the education and academic sectors, the sectors should be flagged as having the greatest (realistic) potential. However, in South Africa with 11 official languages with markets is too small to support writers in each of these languages, support should be given. This could include the cost of translations to make the stories available to larger audiences.

1. Content Generators

The Department of Sports Arts and Culture should develop material that will support authors (and especially self-published authors) to get the most out of taking part in the various festivals. This material should be made available to organisations that support writers and also to the festival organisations.

To recognise great South African authors and encourage more authors, especially from underrepresented languages, attention should be given to an Apex award. Provincial MECs (and even mayors) should be encouraged to give literary awards to deserving authors in their particular provinces or municipalities. Winners and runners-up of these awards could get

nominated for the Apex award that should be awarded either by or in the name of the president.

The Department of Sports Arts and Culture should engage publishers of children's books to investigate innovative ways of making these available to readers of all languages as cheaply as possible. Where possible, small grants or subsidies should be made available to publishers that do this. The value of the grants made should depend on the number of languages that are used, the number of books that are printed, and the number of books that are sold or given to libraries or other institutions. The grant should prohibit the authors from ever pulping and recycling these books.

1. Writers

South Africa has rich talent with untold stories and world-class research. With 11 official languages, South Africa has unique products that it can offer both to South Africans locally and foreigners internationally. Two sets of interventions are proposed:

1. one focusing on South African stories and another on South Africa's academic strengths.

The goal is to increase the number of titles published and to provide support for new authors (especially in African languages) and also to support translations.

2. Fiction and Trade Authors

Although there are a number of excellent fiction authors in South Africa, they serve mostly the English readers and to a lesser extent the Afrikaans readers. More emphasis should be made on encouraging the writers of other languages to produce more books and as discussed elsewhere, that these are translated into English so that a wider audience can be reached.

3. Academic Writers

It would be necessary to provide some incentives. Writers often do not work fulltime but are rather part-time writers and seldom make sufficient money to make a living. Academics do have employment and are encouraged to write journal articles and financial aid is available through the Department of Higher Education and Training. In a bid to improve its research output, offers a subsidy of about R100 000 for each academic article published. This has seen the country's research output rise from 4 063 articles in 2005 to 10 789 in 2014⁶. Part of the allocation should be made available to academics to write textbooks. Conditions could include collaboration with academics from more than one university and especially if they are academics from SADC universities that would increase exports. Funding should focus on additional material that would make the textbook competitive with similar foreign publishers.

Fiction authors should also be provided with access to information, access to finance and cost of finance. Translations of African books should also be supported financially.

4. Translators

Translations of African books should also be supported financially.

5. Copyright Amendment Bill

The creative economy is increasingly producing "dematerialised" (digital) goods and services. Ensuring IP protection (through the Copyright Amendment Bill under discussion) to enable

⁶ <https://qz.com/africa/1080541/south-africa-subsidizes-articles-in-peer-review-free-scram-academic-journals/>
accessed 10 December 2021

monetisation in the digital environment is an absolutely fundamental part of enabling the sector to and develop. Even sectors like visual arts, craft and design that produce more material outputs than other sectors are increasingly having to face IP and Copyright issues in terms of protecting their work from counterfeit, low-quality copies that dilute the market and reduce the value of their work.

2. The Role of Government

The National Book Policy should therefore be flexible on what is considered a book and what can be supported. It must include traditional paper books, especially those with an ISBN or an International Standard Serial Number (ISSN). Publications with an International Standard Music Number (ISMN) may be considered.

DSAC must promote quality content in official languages but focusing on indigenous languages;

The Departments of Basic Education and Higher Education and Training must ensure that learners (and teachers and parents) have suitable devices;

The Department of Communications must ensure that the internet can be accessed across South Africa at affordable prices;

The Department of Science and Technology must continually research technologies that will facilitate the use and development of e-books.

3. Funding and Other Support

Given the constitutional imperatives, other legislation and government policy, the publishing of books in languages other than English or Afrikaans is unacceptably low. The National Arts Council, The DBE, Lotto, and other institution providing financial assistance or making decisions on purchasing books should make grants available to suitable writers.

Libraries can also make an important contribution to the development of authors. If all libraries agreed to purchase a minimum number of books to cover part of the fixed costs of publishing the books, more non-English titles will appear.

These writers' publications should be featured during the National Book Month.

4. Book Month

In the past South African Book Development Council ran a "Book Week." Unfortunately, due to C-19 the council is forced to shut its doors and the DSAC decided to introduce an annual "Book Month." Although DSAC has taken the lead role in this endeavour the National Book Month must be viewed as a national event with government departments (in all three spheres of government), NGOs, and the private sector each contributing.

Themes should be decided annually. DSAC should provide supporting material to all the partners that are involved. The material must include promotional items but also support material that, for example, can assist teachers and parents to encourage reading from an early age.

1. Libraries

All libraries should be encouraged to take part in the National Book Month and depending on the market which they serve, they should take appropriate measures to ensure that they not only increase their visibility, but also encourage reading.

2. Schools (Department of Basic Education)

DSAC must enter into a memorandum of agreement with the Department of Basic Education at national and provincial level to support the National Book Month.

3. Book Stores (Book Readings)

Book stores across the country should also be encouraged to take part in the National Book Month. Publishers as well as importers of books should be encouraged to select books that can be sold at discounted prices as a promotional opportunity. Bookstores should also encourage authors to do book readings and also to sign books. Technology should be used wherever possible that irrespective of where the author reads the book, the reading can be made available virtually to all other bookstores as well. Similarly, pre-signed books can be made available at participating bookstores.

Bookstores should also be encouraged to undertake age group appropriate events. Where possible but should be given away. In any event, books should be sold at promotional prices. The goal should be that each child owns at least five books and that they should be encouraged to develop their own libraries.

Bookstores should also be encouraged to use the promotional material that is been made available to ensure that there is a universal seem.

4. Book Fairs

The Department of Sports Arts and Culture together with provinces and publishers should ensure that more book phase and book festivals are held in each province and that there is a representation of all official languages.

5. Equity

As discussed above, although the sector has transformed, more needs to be done.

1. New Black Publishers

It is proposed that at least 12 new black publishers be established each year. This would include one new black publisher province and to new black publishers for the Western Cape, KwaZulu-Natal and Gauteng. Both funding and technical support would be necessary for this. It is proposed that PASA assist with the technical aspects and that the funding aspects be arranged through DSAC using existing developmental financial support as discussed below.

2. Hubs/Cluster Development

There are a number of Community Arts Centres across South Africa. It is proposed that A Book Working Group be established at each centre. This would be a place where creative content providers (authors, writers, illustrators, editors, layout artists etc.), publishers in the area, booksellers, libraries and other groups involved in the development and promotion of the book get together to support each other and increase the literary output of the area.

3. Funding

The National Empowerment Fund (NEF) supports black-owned businesses and entrepreneurs to acquire funding for their businesses. Its goal is to assist the black youth, men and women, communities, and businesses to be viable and successful businesses. There are several types of NEF funding, including new venture finance, capital markets, expansion capital, and liquidity and warehousing and also for black entrepreneurs who are looking forward to expanding their existing business, or have new business ventures. NEF funding ranges from R2 million to R75 million.

The SEFA offers entrepreneurs finances to start and grow their businesses with various types of SEFA funds which include short term loans, bridging loans, and structured finance ranging from as low as R500 to R3 million.

Funding for entrepreneurs starting new enterprises or supporting companies that want to extend existing operations. Financial products (low-interest loans) and non-financial services are offered to qualifying SMMEs and cooperatives.

6. Technology and E-books

Government must not only focus on the production of conventional books but must include the development of e-books. Strategies across government must contribute to the development of e-book.

Government should also take account of e-books. The prevalence of smart phones and other devices makes the media suitable especially for the younger generation. Electronic formats are cheaper than printed books and can also accommodate features like:

- glossaries;
- translations;
- explanatory notes; and
- pictures.

The marginal cost of e-books is practically zero and therefore would tend to reduce prices over time as volumes sold increases.

In line with legislation, a book (for purposes of the National Book Policy) must be submitted to Legal Deposit Libraries and catalogued accordingly.

Although a focus should be placed on South African books, the book policy should encourage international books of excellence and also classics.

E-books can also be updated relatively quickly, and distribution is almost instantaneous and less costly if there is the necessary ICT infrastructure.

Efforts should be made to make newspapers and non-fiction reading material available in all of South Africa's official languages and also in Braille. A special effort must be made to translate popular children's non-fiction material into indigenous languages. These must be made available at all public libraries as well as at school libraries. Librarians and teachers should encourage both parents (or guardians) and children to read these. These non-fiction books should be fun and of interest to the children.

Churches should also be encouraged to make children's Bibles available to their congregants and encourage parents to read the stories with their children.

Further, The National Book Policy must include the distribution of books using technology such as e-books. E-book readers should be made available at libraries (for uses either to use at the library or to take home). The Department of Sports Arts and Culture together with the Department for Communications must work together to reduce the cost of broadband. The Department of Sports Arts and Culture together with the Department of Science and Technology (tertiary research institutions) must investigate how to make e-book readers more affordable and then together with the Department of Trade and Industry (who can provide grants to potential industrialists) to produce e-book readers at affordable prices.

7. Reading Culture

A Book Policy must ensure that suitable books (and supporting material where necessary) are made available at all libraries and schools for schoolchildren at all ages, especially focusing on early readers. Parents must be encouraged to get these books and read them to the

children. Support material assisting parents on how to reach their children should also be developed in all languages and made available across South Africa.

Teachers should also interact with parents to encourage them to read more to their children. This should not be limited to the prescribed reading but should be wider and include all types of reading, especially those that the children are interested in.

Librarians also have an important role to play and should be “trained” where necessary to support parents in choosing appropriate books for their children and also to help and encourage them to read these to their children. Special library corners should be created at all libraries, and even at community centres, where special book clubs that focus on children can meet and where parents, guardians, teachers and librarians can share information and techniques that work and also encourage each other.

Liberians should identify suitable English books that can be translated. The Department of Sports Arts and Culture should enter into negotiations with the publishers to translate and print these books and distribute them to libraries and schools. The department should also commission the writing of material to assist parents in teaching their children to read as well as commissioning original books to be written in indigenous languages that will be suitable to help parents teach their children to read.

The Reading Coalition and other reading initiatives should also be consulted on the role that they could play. Where necessary, government should provide seed funding for a limited period to promote the establishment and the development of reading initiatives across the country. The private sector should also be encouraged to support these reading initiatives.

8. Access to Books

address the issue of access to books in rural areas. Given the cost of doing this will make this objective prohibitively expensive. Imaginative ways of achieving this must be considered though. The use of mobile libraries must be increased to reach underserved areas. If mobile libraries do go out, The Department of Sports Arts and Culture together with National Treasury must investigate ways that publishers can distribute their books using mobile libraries.

The relevant Ministers and Members of Executive Councils (or MinMEC) and the officials at relevant departments should implement innovative ways of making libraries more accessible and closer to all people, especially those in rural areas. The use of school libraries and community Art Centres should be used as libraries. Mobile libraries must also be considered.

Legislation and regulations should be changed so that Legal Deposit Libraries are made available in each province. Consideration can also be given to having more than one legal deposit library where geographic distances will hamper researchers accessing the material. Two books must be provided to each library. One book that can be preserved and a second book made available to researchers to consult. Legal Deposit Libraries must not become lending libraries, however.

9. Book Clubs

More book clubs should be established. The Department of Sports Arts and Culture must work together with the DBE to ensure that the guidelines that they have created are made available to all relevant stakeholders and organisations and people that can help develop a culture of reading in South Africa.

Officials from the Departments of Sports Arts and Culture and of Correctional Services should form a committee that will promote the concept of book clubs in all prisons throughout South

Africa. Annual reports should be submitted to both portfolio committees at Parliament regarding the progress of the book clubs and the impact it has had on inmates. Churches, organised business and publishers should also be approached to donate books to book clubs in prisons.

The funding model, where costs are shared between the book clubs, publishers, Department of Sports Arts and Culture be developed to provide an incentive for the establishment and sustainability of book clubs especially in rural areas.

10. Export Development

UNCTAD (2018) finds that South-South trade in cultural goods and services is rising, which could offer opportunities for new trading partners, like the BRICS. If all 54 African countries join the African Continental Free Trade Area, it is expected to be one of the world's largest single markets - \$4 trillion in spending and investment, offering improved market access and other great opportunities for mutually beneficial cultural trade. Further, the ease of doing business will stimulate trade.

The PASA with the support of DSAC should approach the Department of Trade, Industry and Competition to form an export council with the objective of developing and implementing an export development and promotion strategy.

11. Integrated National Strategy

There is a need for an integrated national strategy, supported by a National Book Policy as a legislative framework, in order to fully exploit the potential of the book industry. In this regard, the Minister of Arts and Culture appointed a Ministerial Task Team with the purpose of identifying growth opportunities for the local books and publishing sector. One of the key recommendations of the Task Team is the establishment of a statutory body for the book sector. Such an institution would play a central role in developing growth strategies for the sector in order to nurture a globally competitive local book industry.

At the core of any strategy to develop the book sector is a sustained reading promotion strategy that encourages equitable development of all South African languages. A widespread culture of reading and writing will assist us as a nation to meet the demands of developing a knowledgeable society and advance the contribution of the book sector in the country's economy.

7. Conclusion

The publishing industry is under pressure. Number of physical books been produced and sold is declining. The South African book sector, although struggling, is the most thriving in Africa but has got a potential to be a force to be reckoned with internationally.

There are a number of reasons for this. Reading has a number of competitors when it comes to leisure time activities. Many children have not developed the “love for the book,” and therefore do not buy or read books.

For the full potential of the industry to be realised, it is imperative that the book sector is declared as one of the national priorities.

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The Definition of a Book

As with heritage and culture, the definition of a book has changed. Today with new Information and Communication Technologies (ICT), books are now available in a wide variety of media. Therefore, before a book policy can be finalised, it is necessary to look at what a book actually is.

The development of writing, and various other inventions such as paper and printing resulted in reading material. These include rock paintings, tablets, scrolls and sheets of papyrus. Therefore, the earliest history of books actually predates what would conventionally be called "books."

Unfortunately, many ancient books have been lost because of the fact that scrolls and papyrus are perishable. There are however exceptions with the Dead Sea or Qumran Caves Scrolls. These are ancient Jewish religious manuscripts found in the Qumran Caves in the Judean Desert. Fortunately, the desert climate protected them. This was not the case in other more humid areas of the world. Tablets, or carvings on granite or other stone, preserved some ancient literature, such as the Rosetta Stone, as well.

It was expensive and laborious work to reproduce literary works, whether in papyrus and especially those

carved into stones. These had to be meticulously hand copied. Because of this, they were valuable and usually not available to the public. However, there were libraries in larger cities across the ancient world including those at Alexandria, Athens, Constantinople, Ephesus and Nineveh. But even these were not generally made available to the public.

Hand-bound, expensive and elaborate books later appeared. These were also meticulously handwritten. It was not until the printing press, a mechanical device for applying pressure to an inked surface resting upon a print medium (such as paper or cloth), thereby transferring the ink, was invented that books became cheaper to produce. With the invention of the printing press by Fust, Schoffer and Gutenberg, mass printed material became widespread. (Rees, 2005)

Until the internet era, a book conventionally consists of a written or printed work consisting of pages glued or sewn together along one side and bound in covers. Although the book is still the most associated type of reading material, in reality this is changing. There are many similarities but also differences. Written information can come from virtually anywhere.

- media;
- blogs;
- books;
- journal and magazine articles, and

"Books are a form of cultural expression that lives through and as part of a chosen language. Each publication is created in a distinct language and is intended for a language-specific reading audience. A book is thus written, produced, exchanged, used and appreciated in a given linguistic and cultural setting. This year we highlight this important dimension because 2019 marks the International Year of Indigenous Languages, led by UNESCO, to reaffirm the commitment of the international community in supporting indigenous peoples to preserve their cultures, knowledge and rights."

— Audrey Azoulay, Director-General of UNESCO, on the occasion of World Book and Copyright Day

- web pages.

The book also became more accessible to the disabled with the advent of Braille and spoken books.

A revolution occurred with the advent of the e-book is structured like a book and is read using a portable electronic device (e-book readers) used to download and read books or magazines that are in digital form. A variety of specialised portable electronic devices can be used to download and read books or magazines that are an appropriate digital form. Unlike desktop computers, laptop computers and tablets (that also can be used read e-books), a major advantages of e-book readers is their long battery life. New technologies can give rise to “digital storytelling” (DST) in particular. This can be used to improve knowledge, skills and performance for scholars, students and workers. DST can provide a platform from which disadvantage South Africans can progress on an equal footing, locally and internationally.

E-books

In the 2000s, with the increasing availability of affordable handheld computing devices, the opportunity to share texts through electronic means became an option for publishers. Thus, contemporary books may even have no physical presence with the advent of the e-book. With Braille the book also became more accessible to the disabled. Even traditional books have evolved with audio books blurring the distinction between what is a traditional book and other media. The Collins Dictionary ([www.collinsdictionary.com/dictionary/english/reading material](http://www.collinsdictionary.com/dictionary/english/reading%20material) accessed 20 June 2019) provides the following definition for reading material:

... any matter that can be read, written or printed text

As the information age develops and the fourth industrial revolution matures, there will be a continued blurring between the reading material types.

With the saving on paper, print, binding and warehousing production of digital books is cheaper than print books. However, both digital and printed books require editorial, design, typesetting, royalties, selling and marketing. The final price depends on the definition of “e-book.” Any digital version of a printed book is a separate product which will require a budget for the purchasing of digital material. The price will vary depending on the functionality of the e-book. For example, whether it is:

- a static PDF e-book;
- an ePUB e-book with or without hyperlinks to external videos and websites, or
- an interactive e-book with embedded enhancements such as videos (which will not be in the print edition).

Other costs in the digital ecosystem have moved from the producer/ publisher (so are no longer reflected in the price of a book) to the user. These costs relate to hardware (e-readers), training and technical support, upgrading costs, file server and maintenance costs, and bandwidth costs.

The Spanish Publishers Association also released its annual reading habits report which reported 67.2% of the population had read a book in 2018. The report reveals that those who read e-Books tend to read more books than those reading physical books (13.2 per year

compared to 11.2. per year) but, perhaps worryingly, 79% of digital books read in the last year were obtained without paying for them.⁷

⁷ <https://www.internationalpublishers.org/news/776-statistics-galore-european-and-international-publishing-figures-released>

Scribe Guide to Publishing Imprints

Tucker Max <https://scribemedia.com/publishing-imprint/>

Tucker has sold over 5 million books as a 4x NYT Best-selling author and is the co-founder of Scribe.

For any author publishing outside of [traditional publishing](#)—meaning all the various forms of [self-publishing](#)—at some point, you have to address the question of who your publisher is and what imprint you will publish under. I put this guide together to help Scribe authors (and anyone else) navigate this decision.

What Is an Imprint?

[Wikipedia](#) (in This Case, a Reliable Source) Says:

“An imprint of a publisher is a trade name under which it publishes a work. A single publishing company may have multiple imprints, often using the different names as brands to market works to various demographic consumer segments.”

Plainly put, an imprint is the name used to publish a book, which can differ from the name of the actual company that publishes the book. That is, it.

So, for example, in the case of this company. Scribe Media are the name of our company, but we publish most of our books under one primary imprint, [Lioncrest Publishing](#).

1. Why Do They Matter?

Quite honestly, they do not matter much at all.

No reader pays any attention to who published any book they are reading. I can even give you proof:

Think of your three favourite books, the ones that had the deepest impact on your life.

Who Published Them?

Chances are you have no idea. I cannot name the publisher of any of my favourites.

You know why? **Publishers don't ultimately matter.**

This being said, to some authors, they do matter. Many of the authors who work with Scribe like being published under the [Lioncrest publishing](#) imprint, because that imprint has had so many successful *NY Times* and *WSJ* best-selling authors (like [David Goggins](#), [Craig Ballantyne](#), [Cameron Herold](#), and many others), and they like being associated with those authors.

I get that idea—we all want to be associated with people we respect, but let's be honest: just because other authors under any publishing imprint have succeeded, does not mean you are successful if you publish with the same imprint. That is not how it works.

2. How Do I Choose One?

Well, if you have a traditionally published book, you do not choose. It is assigned to you.

If you are self-publishing without any professional help, then you have to use KDP, or make up your own imprint.

But if you are an author working with Scribe, there are four primary options:

Authors with manuscripts that Scribe has had a substantive hand in writing or editing have the option to publish under our Lioncrest Publishing imprint.

Authors who come to us with a finished manuscript and do not opt to work with us on writing or editing have the option to publish under our [Houndstooth publishing](#) imprint.

All authors have the option to create their own imprint. Some authors prefer to publish under their own imprint, for any number of reasons (including some of our best books, like [One Last Talk](#)). Scribe can offer advice and help in creating a custom imprint.

On rare occasion, an author may make choices for their book that completely make sense for their objectives, but that prevent us from publishing under our Lioncrest or Houndstooth imprints. In these cases, we require the author to publish under their own custom imprint.

Most people who are deeply worried about who the publisher is are playing status games. If they have a high-status publisher, they think it makes them and their book high status.

Here is the hard reality: that is just not true.

HarperCollins published *To Kill A Mockingbird*, but no one thinks that the 500 other novels they publish each year are any better or worse because of that fact.

Now, 40+ years ago, it did matter. Each publishing imprint had a distinct style and voice, and many readers searched for new books not by the author, but by publishing imprint.

The best example of this is Harlequin. They so dominated their niche that even to this day, romance novels are often called Harlequin romances.

But that was a long time ago. And it is gone now. Again, no reader cares who published your book, because it does not much matter.

Do you know what they do care about? If the book is good or not.

3. Can I Use My Company Name? Should I?

It depends.

If you own the IP of your company name, then you can. If you do not own the IP of your company, then you need permission from the owner.

If you do own the IP or have permission, the question becomes: should you?

Again, the answer is: it depends.

In some industries, this is standard practice. In others, it is unheard of.

But again, it does not mean much either way. It is one of the more minor decisions you will make in the book [publishing process](#).

4. Will People Know I Self-published If I Use My Own Imprint?

Let's recap:

No one really cares who the publisher is, so they probably will not notice.

If they do know, so what? After all, you did self-publish.

There is nothing wrong with self-publishing. In fact, in the modern world, for most authors, self-publishing is better. It means you get full creative control, you own all the rights, and all the profits. That is why [David Goggins](#) did it.

I am kind of being glib here, but the reality is it honestly does not matter who published your book. The days of your publisher being an important status signal to readers are decades past.

5. Are There Any Rules I Need to Follow in Selecting My Imprint Name?

Aside from basic intellectual property rules, there are not "official" rules. But there are some guidelines:

We recommend you use a name that no one else is already using as a publishing imprint.

We recommend you check Amazon to make sure it is not being used.

We recommend you also check Google to make sure it is not being used.

6. Can I Use a Name That Is Been Trademarked? How Do I Find Out If the Name I Picked Is Available?

Yes, you can use a trademarked name—*assuming you own the trademark or have permission from the owner*.

If not...then no, you cannot use another person's trademarked name.

If you are unsure, the US Patent and Trademark Office has a [search engine](#) just for you.

7. Can I Change It Later?

Yes. It can be expensive and annoying for many reasons (basically, you have to fully republish the book), but it is possible.

8. Do I Need to Set This Imprint Up as a Business? Or Get a Trademark?

You can, but you definitely do not need to. In fact, if you are a Scribe author, the imprint you publish under has no relevance to who gets the money from your book (you), or how taxes are paid (same way).

And same with a trademark: you can get one, but you do not need one unless you plan to use this in other ways and create a brand out of it.

NOTE: if you live outside the US, this advice may be wrong, and you should use your local laws as guides, not me.

9. The Final Word on Publishing Imprints

To recap: An imprint is a name used to publish a book. If you use a traditional publisher, you will be assigned an imprint. If you self-publish, you can use KDP or make up your own imprint.

Decades ago, the imprint was an important status signal to readers. Today, readers do not care what imprint you use to publish your book. They only care if your book is good.

Self-Publishing vs Traditional in 2021 [Which is Better?]

Tucker Max <https://scribemediacom/self-publishing-vs-traditional/>

“Should I self-publish or traditionally publish? Which is better right now?”

This is one of the most common questions we get at Scribe.

The problem with this question is the answer can be very complex. There are so many different factors that could possibly come into play, and the answers are not always cut and dry.

But...it is only complicated for about 2% of authors.

For 97% of authors, the answer is very clear: *self-publishing is the right choice*.

For the other 1% of authors, the answer is very clear in the other direction: *traditional publishing is the better choice*.

This post is for that 98% of authors who should clearly go one way or the other and is designed to help you easily and quickly understand which side you are on.

This post is not written for the 2% of authors who need a long, complicated explanation. For those authors, I wrote another post that [really dives deep into the complicated details](#).

2. What Is the Difference Between Self-Publishing and Traditional Publishing?

There is only ONE key difference:

If the author owns the rights and [royalties](#), then the book is self-published.

If the publishing company owns the rights and royalties, then the book is traditionally published.

That is, it. Everything else is commentary on that single distinction.

3. Who Should Traditionally Publish?

First off, it is very hard to get an offer to traditionally publish ([why that is so is covered here](#)).

But if you can get an offer, and an advance of \$500k or more, you should (almost certainly) take the deal. These are mainly the types of people who can get those deals:

- Big Celebrities
- Famous Athletes
- A-List Actors
- Politicians
- Household name CEOs
- Professional Writers (novelists, etc.) with a long history of high sales

What if you can get a deal, but the advance will be less than \$500k? Then it depends. That is part of the 2% who have a complicated answer, and [that is addressed here](#).

4. Who Should Self-Publish?

Just about everyone else:

- Business owners
- Consultants
- Entrepreneurs
- Businesspeople
- C-level executives
- Financial planners
- Lawyers

- Doctors
- Coaches
- Anyone else who just wants to write their book

Why is this? Why should everyone else self-publish?

Because without a big advance, the advantages of [self-publishing](#) greatly outweigh the disadvantages.

5. What Are the Advantages and Disadvantages?

1. Self-Publishing

Advantages	Disadvantages
Full ownership of rights and royalties	You must make sure the book is good in all aspects. If it is unprofessional in any way (writing, cover, marketing, etc.), it will make you look bad.
Completely customisable in all aspects	It is time consuming to learn and manage the process yourself.
Fast to market (6 months)	If you hire excellent professionals to help you, it is expensive.
Complete marketing control	There's either a lot of work, or a lot of money, to get it right.
Complete creative control	
Complete freedom, no gatekeepers telling you what you can and cannot do	
Significantly high profit potential	
Can do niche books (which are a huge advantage for most authors, explained here: https://scribemedi.com/target-book-audience/)	

2. Traditional Publishing

Advantages	Disadvantages
Monetary advance prior to publishing	Nearly impossible to get a deal (less than 1 per cent of proposals are accepted)
Publisher invests the money to publish the book (and they usually can ensure professionalism)	Huge time investment
Highest potential for traditional media coverage	Very slow to market (2+ years)
Highest chance of bookstore placement	No ownership of the rights
Sends signal of validation (to some people)	No marketing control
	No creative or content control
	Limited financial upside

Advantages

Disadvantages

Will not do niche books

6. Self-Publishing vs Traditional Decision Tree

1. Question 1: Can You Get a Traditional Publishing Deal?

If you can get a deal, go to question 2.

If not, then self-publish.

If you are unsure whether you can get a deal or not, [read this article](#). It explains what you need to have to be able to traditionally publish (basically you must have an audience of least 25k+ people waiting to buy your book specifically).

2. Question 2: If You Can Get a Traditional Publishing Deal, Should You Take It?

What do you value most?

If the answer is status, go traditional.

If the answer is validation, go traditional.

If the answer is quick money, go traditional.

If the answer is long term wealth, self-publish.

If the answer is freedom, self-publish.

If the answer is creativity, self-publish.

If the answer is making an impact, self-publish.

7. Conclusion: Self-Publishing Is Probably the Right Answer (97+% of the Time)

Like almost all things in life, when you take out the weird fringe exceptions, it becomes pretty clear and easy to understand.

97% of authors should clearly self-publish.

1% of authors should traditionally publish.

The other 2% should take a lot of time and effort and [really dive into the details](#) so they can make a hard decision.

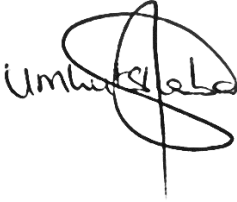
I hope this helps. If not, email me and I will see what I can do to make it clearer:

[tucker\[at\]scribemedi.com](mailto:tucker[at]scribemedi.com).

	1993	1995	2000	2005	2010	2015	2016	2017	2018	2019	2020
Employment output ratio (including informal sector)	1.36	1.41	1.48	1.58	1.38	1.27	1.24	1.26	1.26	1.27	1.16
Remuneration value added ratio	47.27	45.42	54.04	61.51	59.22	61.69	60.77	60.82	62.28	62.44	64.45
Remuneration per employee (including informal sector) (Rand)	194862.24	181609.91	202660.84	183721.95	209642.43	219608.97	211631.55	209189.82	206857.93	206578.31	212393.48
Unit labour cost (Index 2010=100)	99.81	96.97	113.10	104.93	100.00	96.84	93.41	92.98	93.12	94.31	88.53
Net mark-up (Net operating surplus input ratio)	32.93	35.72	25.23	15.43	13.04	10.54	9.84	10.50	9.37	8.30	5.59
Gross mark-up (Gross operating surplus input ratio)	39.54	42.79	32.28	20.52	22.05	19.51	19.62	19.53	18.56	18.62	15.70
Gross domestic fixed investment output ratio	0.04	0.04	0.04	0.05	0.04	0.06	0.06	0.06	0.06	0.06	0.06
Fixed capital stock output ratio	0.38	0.41	0.39	0.42	0.37	0.35	0.35	0.35	0.35	0.38	0.41
Consumption of fixed capital output ratio	0.03	0.03	0.04	0.03	0.06	0.06	0.06	0.06	0.06	0.07	0.07
Labour productivity (including informal sector) (Index 2010=100)	127.41	123.57	115.89	88.13	100.00	101.26	101.36	99.33	96.86	97.21	96.79
Fixed capital productivity (Index 2010=100)	129.57	124.22	118.11	107.90	100.00	101.52	102.01	101.86	101.60	98.60	98.39

	199 3	199 5	200 0	200 5	201 0	201 5	201 6	201 7	201 8	201 9	202 0
Multi-factor productivity (including informal sector) (Index 2010=100)	128.55	123.93	116.91	95.74	100.00	101.36	101.62	100.32	98.64	97.73	97.36
Capital labour ratio	135 520.19	123 237.14	146 196.31	154 515.89	184 228.52	187 243.65	180 935.11	186 126.95	184 129.34	163 745.28	126 404.60
Intermediate imports value in Rand million	2 254.92	2 561.87	2 029.69	2 637.29	3 756.52	5 189.71	5 230.36	5 367.99	5 986.94	5 611.67	5 237.46
Final import value in Rand million	4 792.83	5 616.26	4 968.63	6 518.25	3 964.35	4 076.93	4 066.02	6 716.88	13 673.59	15 191.59	12 275.70
Import leakage (%)	12.78	15.70	12.71	16.05	8.04	7.92	7.96	13.06	26.73	31.12	27.33
Imports-domestic demand ratio	12.51	15.19	12.19	15.23	7.84	7.60	7.59	11.64	20.43	21.89	19.34
Export-output ratio	0.88	1.52	1.94	4.15	3.76	3.80	3.74	3.11	3.33	2.68	2.94

APPROVALS FOR THE SOUTH AFRICAN CULTURAL OBSERVATORY – Economic Scenarios for the Books and Publishing Domain in South Africa – December 2021

	NAME	TITLE	SIGNATURE	DATE
Prepared and recommended by:	<i>Ms. Unathi Lutshaba</i>	<i>SACO Executive Director</i>		15 December 2021
Approved by:	<i>Ms. Lisa Combrinck</i>	<i>DSAC SACO Project Manager</i>		
Approved by:	<i>Dr. Stella (CN) Khumalo</i>	<i>DSAC DDG: Arts, Culture Promotion and Development</i>		

