

Innovative tools for a competitive advantage in publishing

by Rudi MR Venter and Francis Galloway

The Publishing Studies programme in the University of Pretoria's Department of Information Science celebrated its tenth year of existence in 2006. The programme is unique in that it is the only comprehensive teaching programme offering publishing courses on both undergraduate and postgraduate levels in South Africa.

After starting life as a series of short courses, the Publishing Studies programme was initiated in 1996 by Mrs Christa North. Francis Galloway and Rudi MR Venter took over the full-time responsibility for developing the teaching and research agenda in 2000. They were joined by Margaret Labuschagne in 2005.

Apart from the alignment of the curriculum to international standards (such as the programmes offered at Oxford Brookes University, the Centre for Publishing at the New York University and the Centre for Publishing Studies at Stirling University), a focused, quantitative publishing research programme was launched in 2001.

The current focus of the research programme is the quantitative analysis of book production statistics. This focus will be expanded in future to include quantitative aspects of book distribution and consumption. In the quest for a methodological framework, the researchers have been guided by the views of pioneering book study scholars, such as Robert Darnton (Princeton University) and Simon Eliot (University of London), on the epistemology of publishing statistics.

Eliot claims that publishing studies are rooted in the material world: "Textual or iconographic information is produced, processed, transmitted, received and preserved by a series of physical acts on material objects within the real world and this material world is characterised in part, and therefore is to be understood in part, by countable quantities" (Eliot, 2002).

Darnton points to the fact that when the field of book studies began to establish itself, it relied heavily on quantification: "Statistics provided enough material for book historians to construct a general picture of literary (book) culture" and can open the way to various narratives by revealing patterns (Darnton, 2002).

Miha Kovač (University of Ljubljana) stresses the unavailability of reliable contemporary publishing statistics and the late commencement of quantitative publishing research: "Book publishing

is a dark spot in social and media studies. Throughout the twentieth century, statistics on book production and consumption were inadequate and generated randomly, without properly developed methodology. Furthermore, in comparison to library science and media studies, book and publishing studies are latecomers to the world of academia: they gained a domestic right there as late as the last decade of the previous century.

Due to this lack of research tradition and methodology, comparisons among different European and between European and American book industries that took place in recent research projects sponsored by the European Union, open more questions than they provide answers" (Kovač, 2004).

The limited academic interest in publishing studies has been predominantly focused on historical aspects, while research on more recent and contemporary manifestations has been left to random efforts that took place in disciplines such as sociology, economics and literary theory. The role of book industries in national economies is relatively small, with the result that political and economic interest in national book publishing statistics, and its technological and organisational innovations, was traditionally weak. This is reflected in the lack of clearly segregated data on the publishing and printing industries in national statistics bureaus in Europe, where these industries are regarded as cultural rather than economic entities.

In recent years, the lack of useful and reliable statistical data on the South African book publishing industry has been noted by various role-players. Apart from the vested interest of publishers and the book trade, there is an increasing demand for this kind of information by international bodies such as the International Publishers' Association (IPA) and the Board of the Frankfurt Book Fair (FBF), especially since the latter became a partner in the international Cape Town Book Fair (CTBF). Statistical information on the industry is also required by government through

individual representative bodies or the Print Industries Cluster Council (PICC). It is within this context that the Publishing Studies research programme has proven to be innovative and pioneering.

In order to address the current need for quantitative data on book publishing, this research programme focuses on generating contemporary publishing statistics. The aim of the programme is two-fold: to accumulate and package quantitative data in such a way that broad patterns can be identified through the construction of various profiles; and to interpret the patterns with reference to developments and/or changes in the institutional environment and the broader political, economic, socio-cultural and technological context during specific eras or periods.

Outcomes of the programme include the development and exploitation of consolidated sources on publishing statistics (including a production trends database and a series of annual industry surveys); and the development of methodological tools for the measurement of the growth/decline and diversification/stagnation of the industry (the development of a theoretical model of the publishing system and typologies of production categories and producers).

Before the development of the production trends database, there was no integrated and suitably organised central source from which to glean generic consolidated figures on the number (of different categories) of books produced locally. The main secondary source for constructing this database is the South African National Bibliography, which is based on legal deposit copies submitted to the National Library of South Africa.

During specific research applications (for example, research into production trends in fiction/non-fiction trade publishing, academic publishing or educational publishing), the data must be refined and verified by means of other secondary or primary (including archival) sources, such as bibliographic records of libraries/collections, local and international publishers' catalogues/price lists, publishers' archives and blurbs

copy or bibliographical data obtainable from the books themselves. An example of this kind of application is Venter's PhD research on the material production of Afrikaans fiction during the period 1990 to 2005, in which the impact of political, economic and institutional transformation on the production and producer landscapes was mapped in detail (Venter, 2006).

The annual industry surveys contribute to an ongoing contract research project commissioned by the Publishers' Association of South Africa (PASA). To date, four annual reports, as well as one report on broad trends during the period 2002 to 2005, have been released, containing the results of quantitative primary research aimed at profiling the local industry (Galloway et al., 2004).

The data from the annual industry surveys is hosted in a comprehensive industry database consisting of various profiles: turnover, production, author, royalty, employment and ownership. This database is an innovative tool for the tracking, monitoring and measuring of changes across the book publishing value chain.

A publishing system model has also been developed, which reflects the systemic nature of book publishing. This model is utilised to analyse, interpret and contextualise the quantitative data derived from the production trends database and the annual industry surveys, as well as qualitative data pertaining to developments, issues and trends in the book publishing sector. The model positions the book publishing value chain in relation to relevant institutions (for example, media, culture, education and library subsystems) and to the broader political, economic and technological environment. These relations are constantly changing and must be mapped in order to gain a better understanding of the dynamics that are at work in book publishing during specific periods.

Jason Epstein (veteran publisher and former editorial director of Random House) describes the traditional character of book publishing in terms of

an unconventional small-scale enterprise, managed as a kind of cottage industry: intensive editorial attention is devoted to manuscripts; the personal expertise of editors is a key asset to the business; the relationship between authors and editors is one of trust that is developed over years; it requires a large initial capital layout; and return-on-investment is slow and profit margins low. In this kind of business, the decision to publish is an act of faith and a gamble, based on a developed sense of instinct, and despite all measures to take calculated risks, the final success factor of a specific title cannot be predicted.

Today, the book publishing business stands on the threshold of a transformation that is set to alter its traditional character beyond recognition. This transformation is driven by new technologies and their impact on the way that books are produced, marketed, distributed and consumed. Conglomeration has become an international phenomenon and national book publishing sectors are dominated by a few large, multinational/transnational media empires. Consequently, the book publishing industry has become highly competitive and the market increasingly profit-driven (Epstein, 2001).

In order to gain or retain a competitive advantage in the book publishing business, publishers will increasingly depend on business-enhancing instruments to boost and measure their performance.

The introduction of advanced software tools, which make it possible to measure sales through point-of-sale monitoring (for example, Nielsen BookData, BookNet and BookScan), heralded a new era of scientific book publishing. Before the launch of this kind of software in South Africa in 2003, it was impossible to obtain a general overview of the local book publishing trade. The first Nielsen BookScan South African Yearbook, consolidating and analysing collected sales figures, was recently compiled. The introduction of book trade monitoring tools, such as Nielsen BookScan, and publishing monitoring tools, such as those developed by the

Publishing Studies programme at the University of Pretoria, provide a scientific basis for publishing and investment decisions and will ultimately enhance competitive advantage in the South African book business. ➔

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Dr Rudi MR Venter

(rudi.venter@up.ac.za) is a lecturer in, and **Dr Francis Galloway** (francis.galloway@up.ac.za) coordinator of the Publishing Studies Programme, Department of Information Science, University of Pretoria.



➔ **Dr Rudi Venter and Dr Francis Galloway** researched the most innovative tools for a competitive advantage in publishing.

future gadgets

Hand-Gesture Software

How it works: A next-generation camera for cellphones will recognise preset motions, letting you execute simple commands by moving your hand.

Who's working on it: A technology company called GestureTek

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