



SOUTH AFRICAN BOOK DEVELOPMENT COUNCIL



National survey into the reading and book reading behaviour of adult South Africans 2016

This study was commissioned and managed by
the South African Book Development Council
as part of the Growth and Development
Strategy for the South African Book Sector.



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The study was
part-funded by

DGMT
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The SABDC is the representative body of the South African book sector and its members include key stakeholders in the book value chain in South Africa.

Members of the Council

Academic & Non-Fiction Authors' Association of South Africa (ANFASA)
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Library and Information Association of South Africa (LIASA)
National Library of South Africa (NLSA)
Paper Manufacturers' Association South Africa (PAMSA)
Publishers' Association of South Africa (PASA)
South African Booksellers' Association (SABA)
South African Library for the Blind (SALB)
South African Writers' Association (SAWA)

Observers

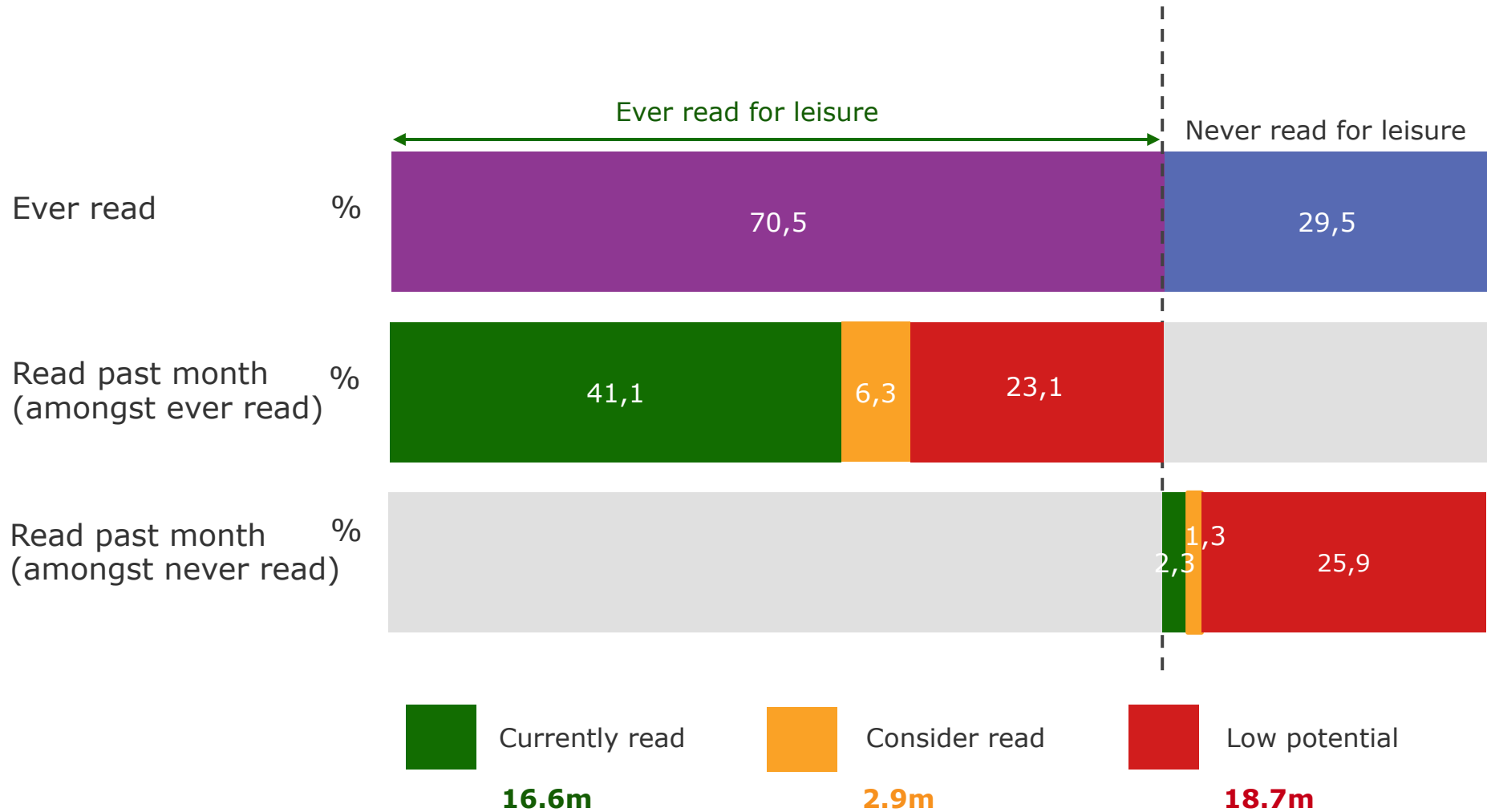
National Department of Arts and Culture (DAC)
National Department of Basic Education (DBE)
National Department of Trade and Industry (DTI) & Small Business Development (DSBD)

Current areas of work

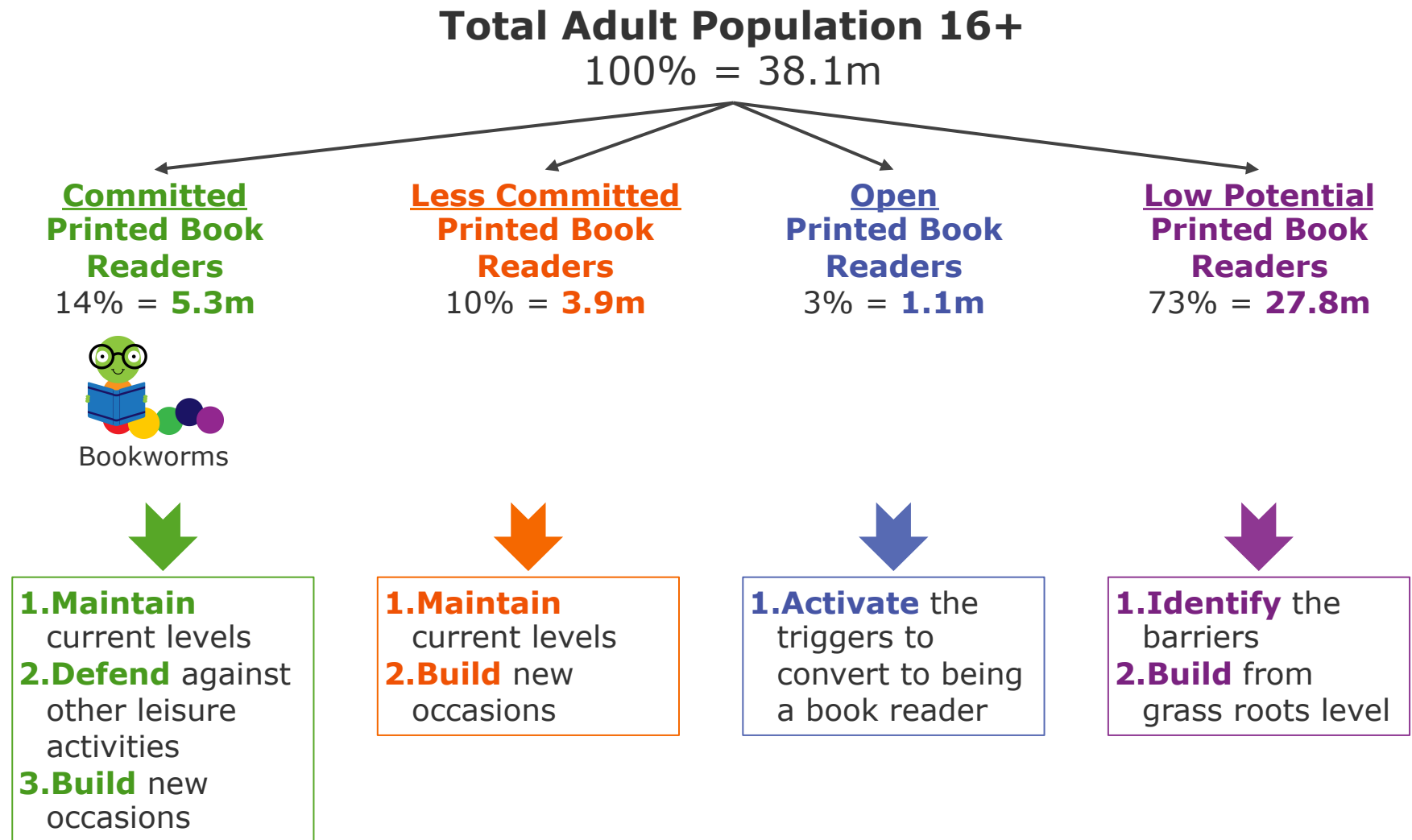
National Book Week
South African Book Fair
Indigenous languages publishing programme
Training for SMME publishers
Editing in the indigenous languages
BBBEE and Enterprise Development
Digital strategy for the book sector
Library procurement
National Reading Survey 2016



Sizing the reading landscape:



Book reading segments: strategy



To reiterate: Why is reading (books) important?

Five broad strategies

- 1 Promote reading for enjoyment to adults, youth and children
- 2 Increase access to books and stories
- 3 Promote indigenous language reading and books
- 4 Implement a coherent book development strategy
- 5 Increase the importance of books in South Africa

Contents

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Introduction – setting the context

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The role of reading in the SA leisure activity landscape

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Book reading attitudes and behaviour

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Creating a reading culture



1

Introduction – setting the context



Why is reading (books) important?

Reading is critical to fulfilling individual potential and collective social development*

The research is unequivocal:

- The degree to which children acquire language skills is a **strong predictor** of future academic success, educational attainment, employment and income
- Reading is a powerful tool to **tackle poverty and inequality**: when children read for pleasure, it has a greater effect on their educational achievement than their family's socio-economic status
- Reading ability and comprehension promotes **social cohesion and innovation** by building empathy, critical thinking and imagination

Books in the home = higher levels of education**

Having as few as 20 books in the home has a significant impact on propelling a child to higher levels of education

- Findings from a recent 20 year study conducted in Nevada's rural communities (May 2010) showed that children from **lesser educated parents benefit the most** from having books in the home
- "The results of this study indicate that **getting some books into their homes is an inexpensive way** that we can help children succeed"

Mariah Evans, UCLA



* DGMT: Create Change 2015

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<http://www.unr.edu/nevada-today/news/2010/books-in-the-home-as-important-as-parents-education-level>



SOUTH AFRICAN
BOOK DEVELOPMENT
COUNCIL

Getting to the heart of your challenge

Key objective

How can book development increase access to books and promote a book reading culture in South Africa?



How does reading fare relative to other leisure activities in 2016?

What is the overall level of reading in 2016 vs. 2006?

What is the future opportunity (desire) for reading in 2016?

What are the drivers of choice of leisure activities?

Where does reading over-perform relative to other leisure activities?

Where does reading under-perform relative to other leisure activities?

What media channels compete against reading?



How do books fare relative to other reading formats in 2016?

What is the overall level of book reading in 2016 vs. 2006?

What is the future opportunity (desire) for book reading in 2016?

Amongst whom does the opportunity lie?

What are the: who, what why, when how of book reading?

How many books are in SA homes?

What/who are the key influencers of book choice?

What does the book access/purchasing landscape look like – including library access?

What are attitudes towards book reading?



What are the barriers and triggers for book reading? What initiatives have worked well to promote book reading?

What are the drivers of choice of reading formats?

Where do books over-perform relative to other reading formats?

Where do books under-perform relative to other reading formats?

What market presence factors need to be addressed as barriers of book reading?

What market presence factors need to be maintained to promote book reading?

What initiatives have been successful to date in promoting book reading?

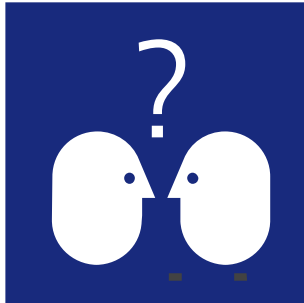


What could be the impact if the right levers are pulled to promote book reading?

What is the size of the opportunity based on existing reading behaviour and the 'desire' to read?

Study methodology and approach

What?



Robust quantitative study **n=4000**

Random respondent selection in HH:
Kish Grid

Who?



Adults, **16+ years**

Represents **38,121,553** adults aged 16yrs +*

Where?



National: metro, small urban and rural

Pure random (**probability**) sampling stratified on province & area type

When?



Interviews conducted: **18 August – 23 September, 2016**

How?



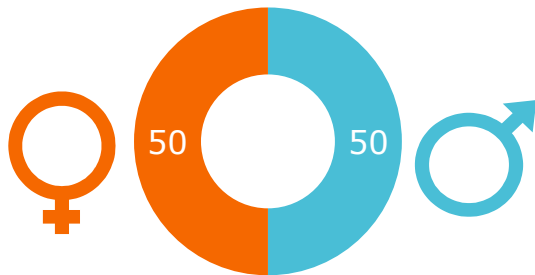
Face-to-face
Computer Aided Personal Interviews (with paper showcards), **35 minutes** interview duration

Showcards shown in **7 languages:** English, Afrikaans, isiZulu, isiXhosa, Sepedi, Sesotho and Setswana

*Data weighted to area/race/province (Stats SA mid year estimate 2016)

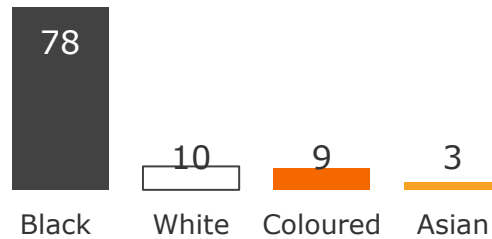
How to read the charts:

Gender



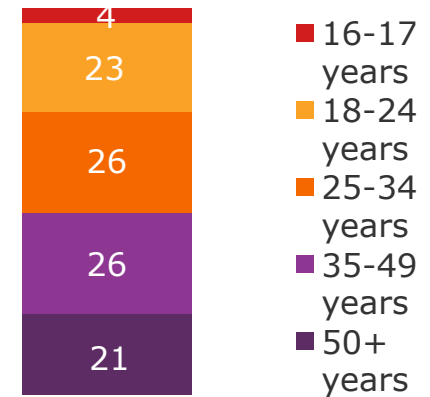
Read: 50% of the total sample are women

Race



Read: 78% of the total sample are black

Age

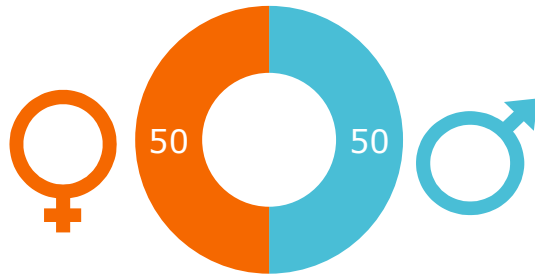


Read: 21% of the total sample are aged 50+ yrs

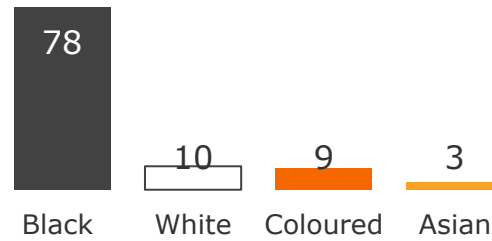
x.xm %'s have been extrapolated into population size (based on 38,121,553 adults 16+) for key measures

Sample profile: demographics

Gender



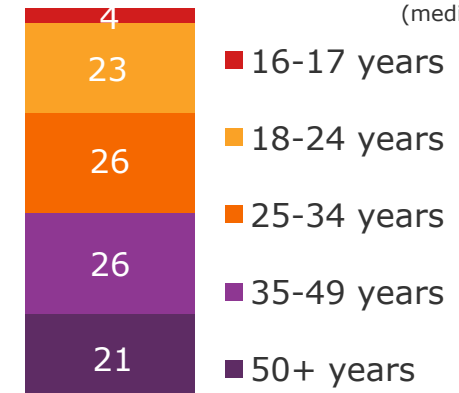
Race



Age



29.5 yrs
average
(median)

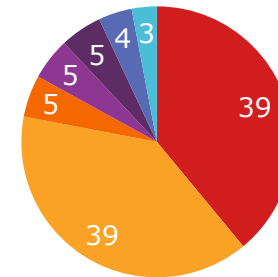


Language

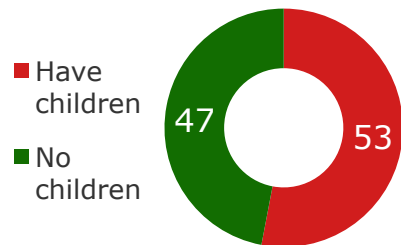


Race/ Gender

- Black male
- Black female
- White male
- White female
- Coloured male
- Coloured female
- Indian/Asian



Children in household



Base: Total sample (n=4000)

*Nguni net (IsiZulu/Zulu, IsiXhosa/Xhosa, Siswati/Swazi, IsiNdebele/South Ndebele/North Ndebele)

** Sotho net (Sepedi/Northern Sotho, Setswana/Tswana, Sesotho/Southern Sotho/Sotho)

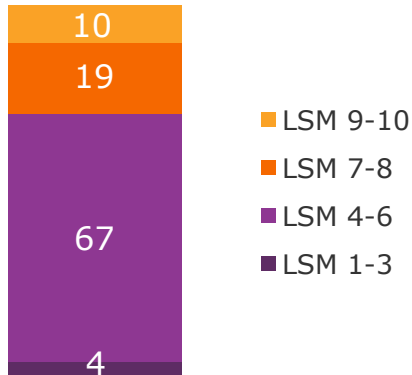


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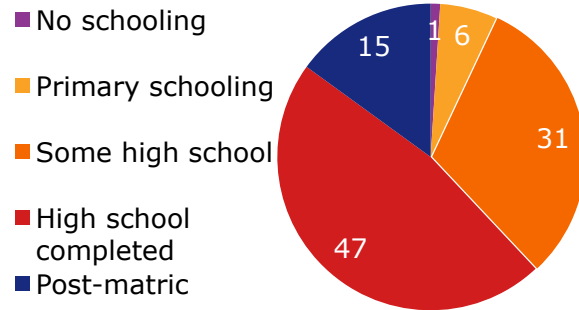


Sample profile: demographics (cont'd)

LSM* profile



Education



Area type



41% Metro

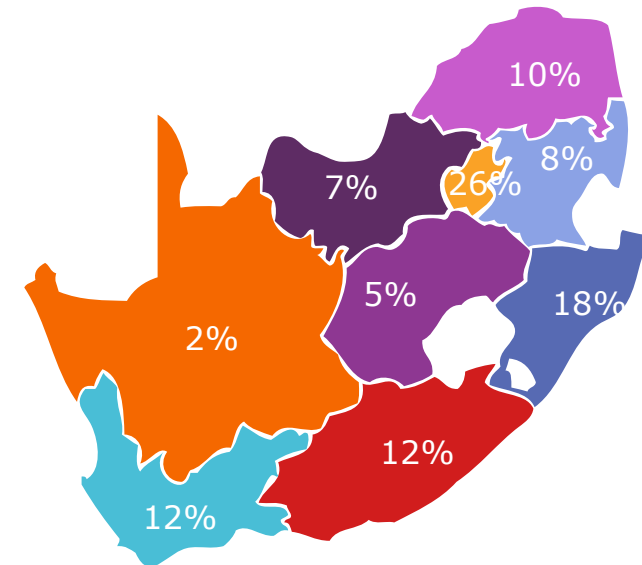


30% Small urban

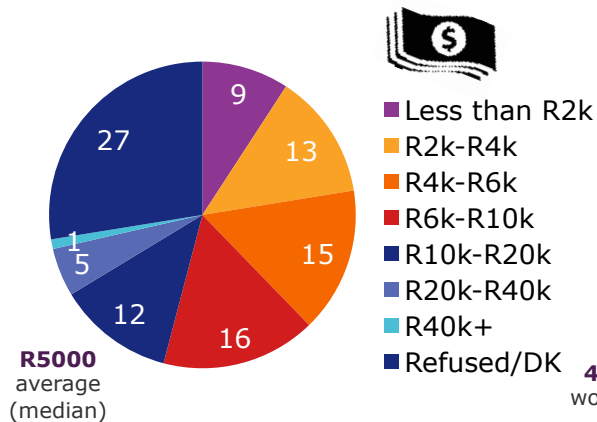


28% Rural

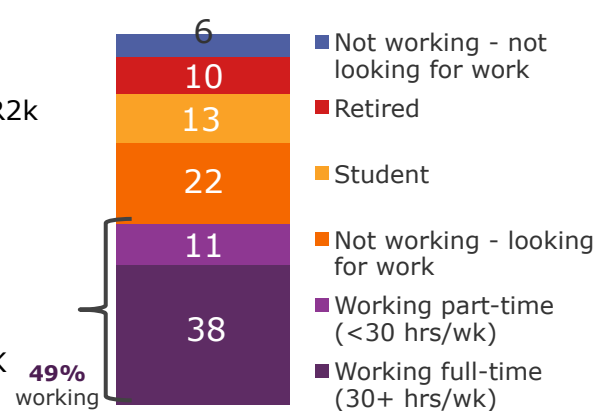
Province



Monthly household income



Employment



Base: Total sample (n=4000)

*LSM = Living Standards Measure classification into 10 segments, LSM 10=highest, LSM 1=lowest



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2

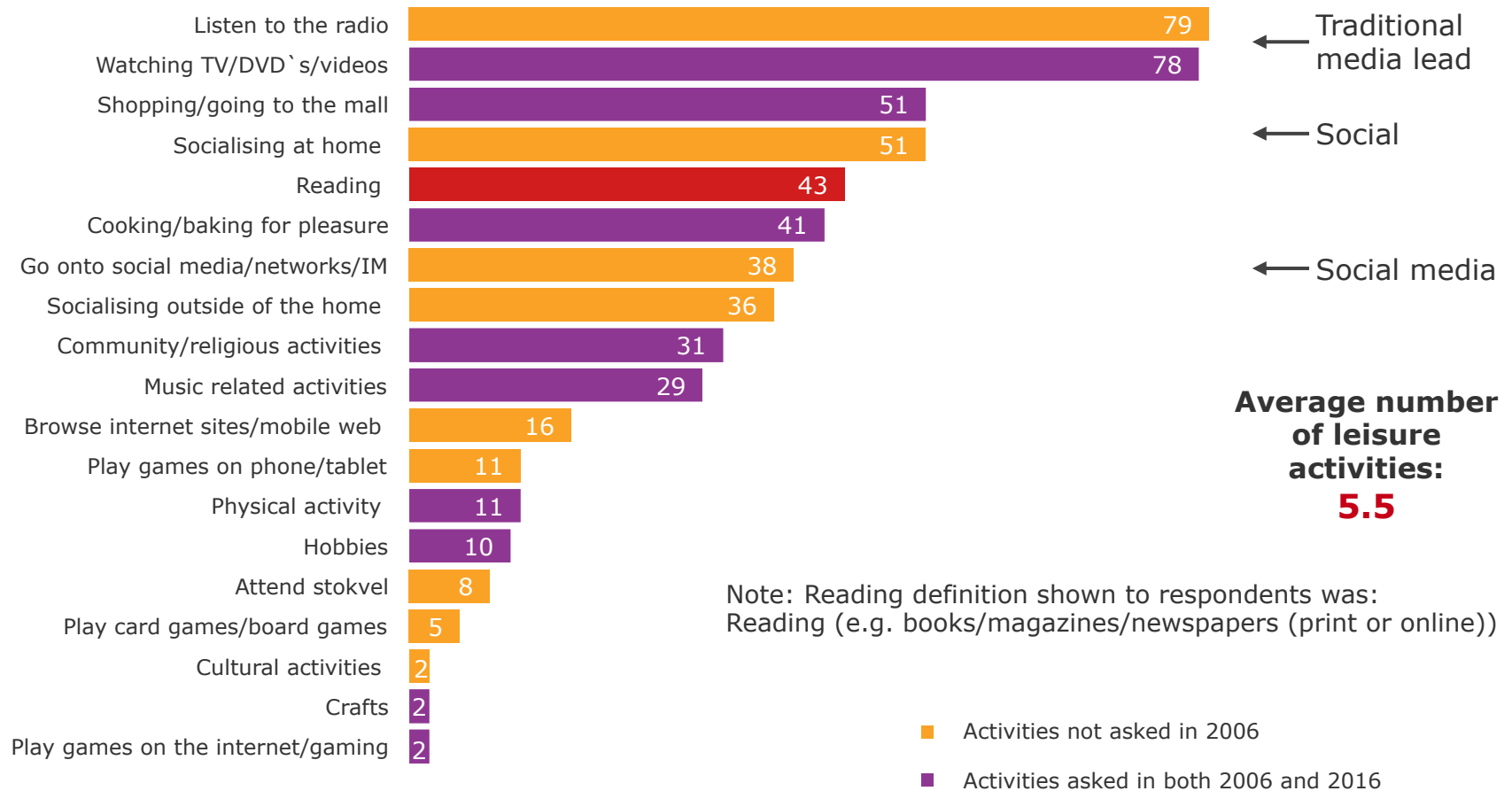
The role of reading in the South African leisure activity landscape



Reading is the fifth highest leisure activity (43%) done in the past month by SA adults 16yrs+



Leisure activities in the past month



Base: Total sample (n=4000)

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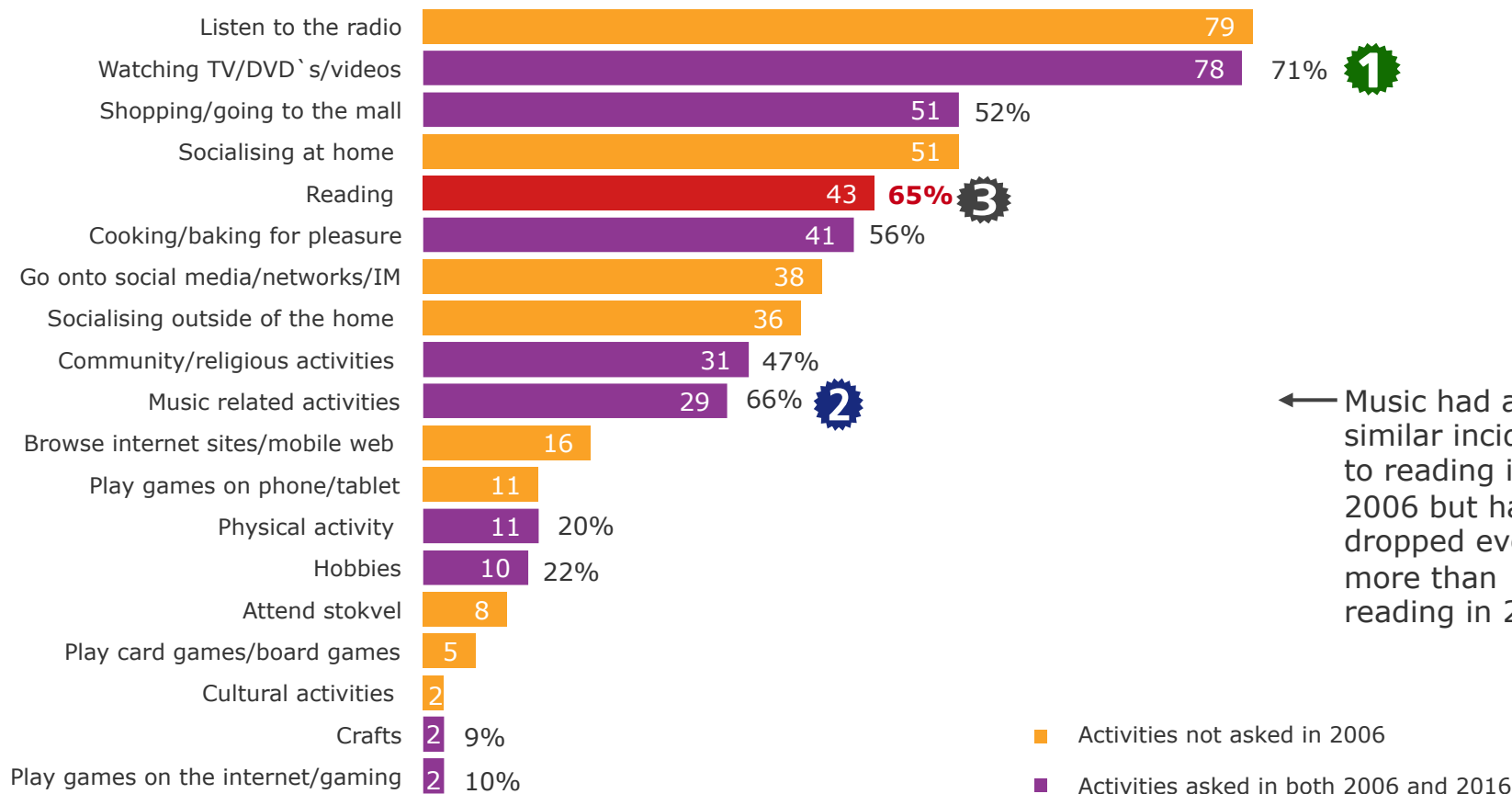
Reading needs to partner with other frequently conducted activities to stay relevant and boost growth e.g. cookbooks, socialising with books, etc.



Incidence of reading in the past month has declined significantly vs. 2006 – dropping from 65% to 43%



Leisure activities in the past month



← Music had a similar incidence to reading in 2006 but has dropped even more than reading in 2016



Base: Total sample (n=4000)

© TNS



Increased number of activities available in 2016 means that Reading has a lot more competition for scarce leisure time

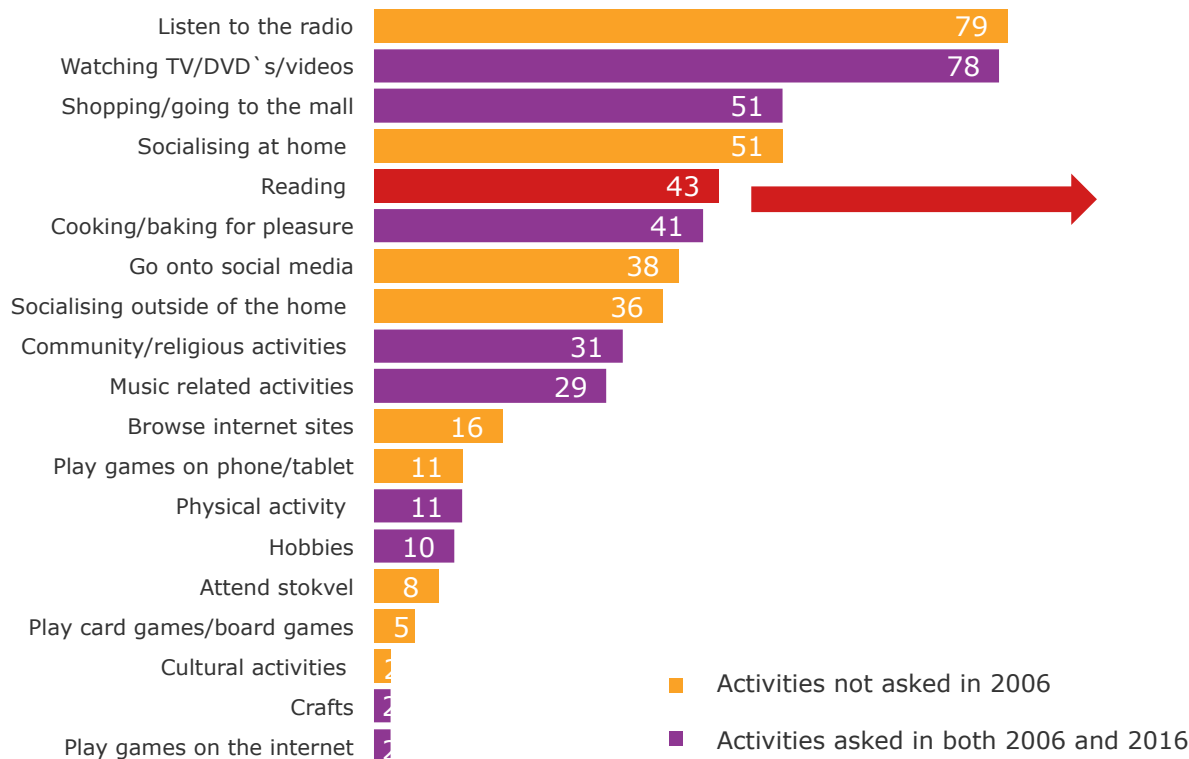


Incidence of reading generally **increases** with Socio Economic Class (SEC) levels, education, younger ages and English/Afrikaans speaking



Incidence of reading for leisure past month increases from 43% in total sample to ..?

Leisure activities in the past month



- Metro 48%
- Gauteng 47%
- Mpumalanga 52%
- White female 59%
- Indian/Asian 54%
- White male 54%
- Coloured female 51%
- LSM 9-10 58%
- LSM 7-8 52%
- 16-17 yrs 53%
- 18-24 yrs 48%
- Post matric 59%
- High school 47%
- English 58%
- Afrikaans 49%



Base: Total sample (n=4000)
SEC = Socio Economic Class classification

Education appears as the key demographic showing the widest range of results from high to low incidence



Is education the driver of reading or is reading the driver of education?

Who is least likely to have read for leisure past month?



Incidence of reading for leisure past month *decreases* from 43% in total sample to ..?

Rural: 37%

Free State: 35%, Northern Cape: 35%

Black female: 39%

LSM 1-3: 26%

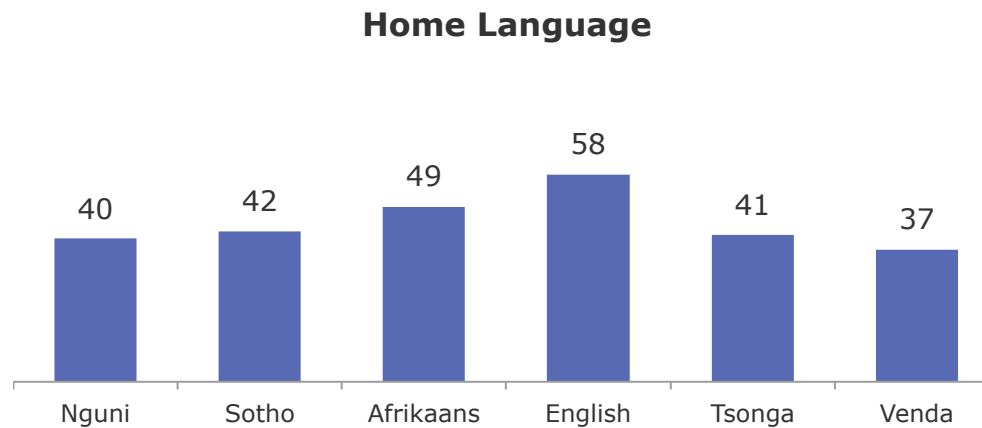
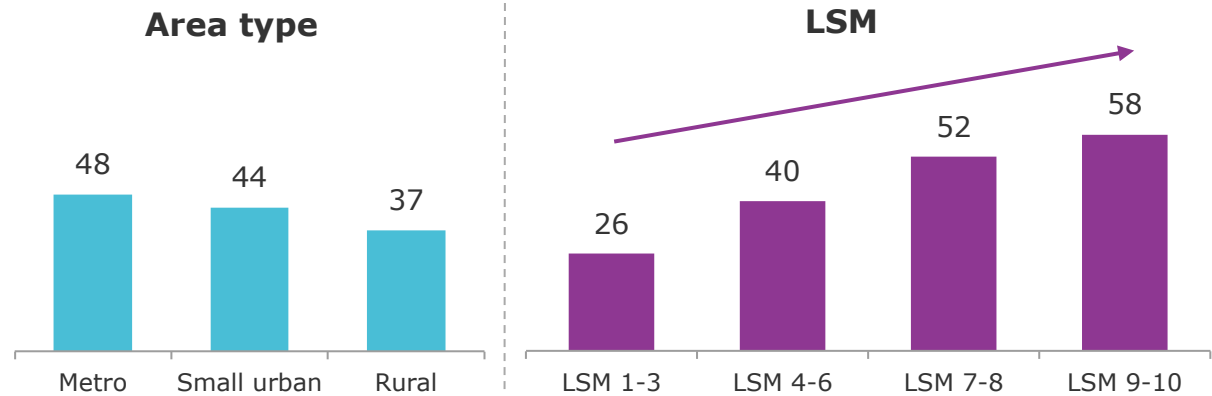
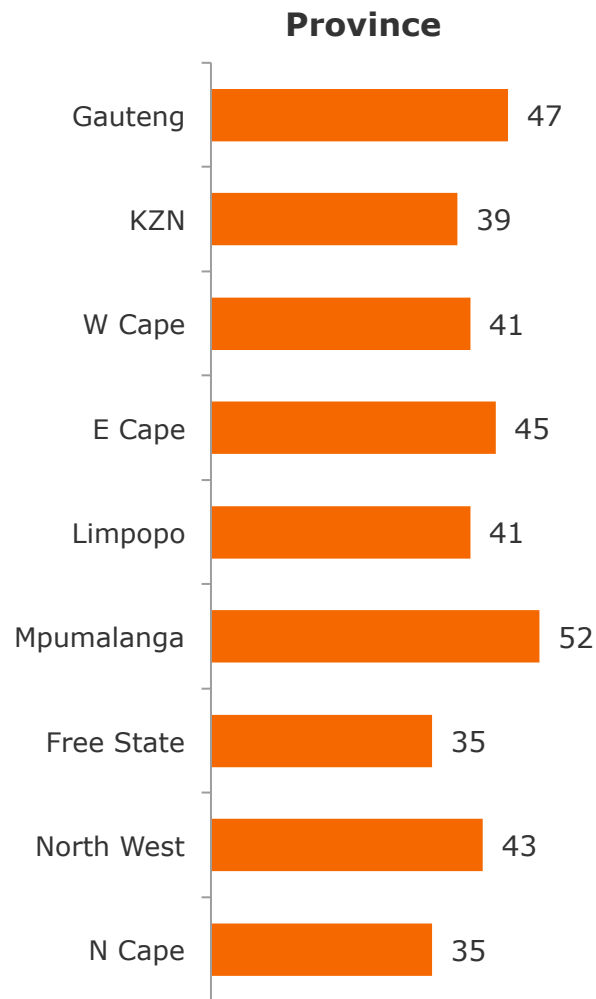
50+ year olds: 39%

No schooling: 3%, primary school: 19%

Home language: Venda 37%

'Read for leisure in PM' incidence – by demographics

Average: 43%

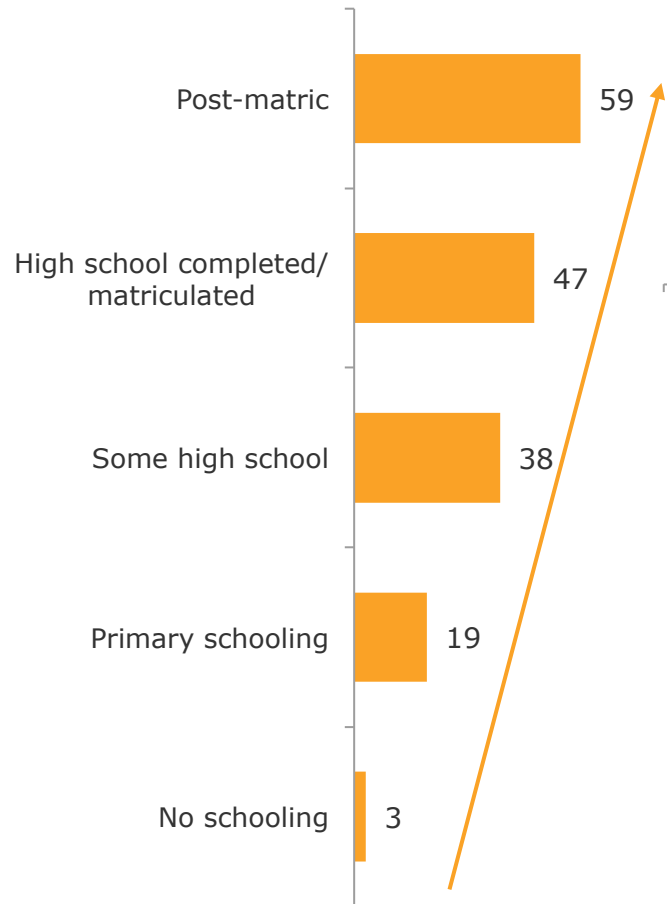


'Read for leisure in PM' incidence – by demographics

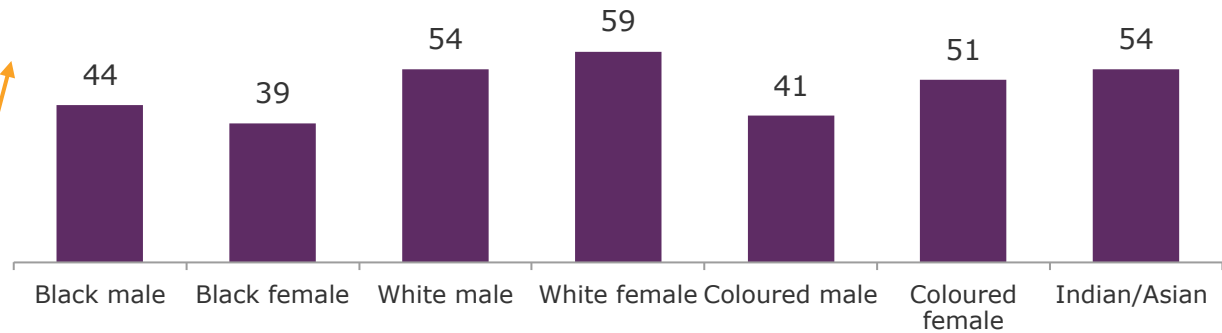
Average: 43%



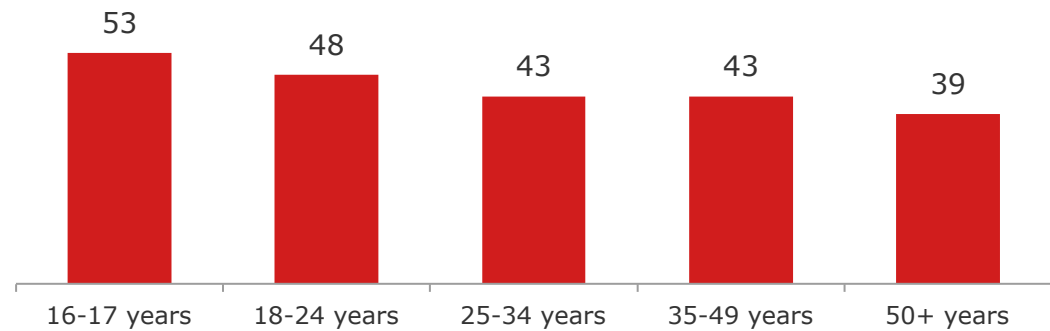
Education



Race/Gender



Age



Base: Total sample (n=4000)

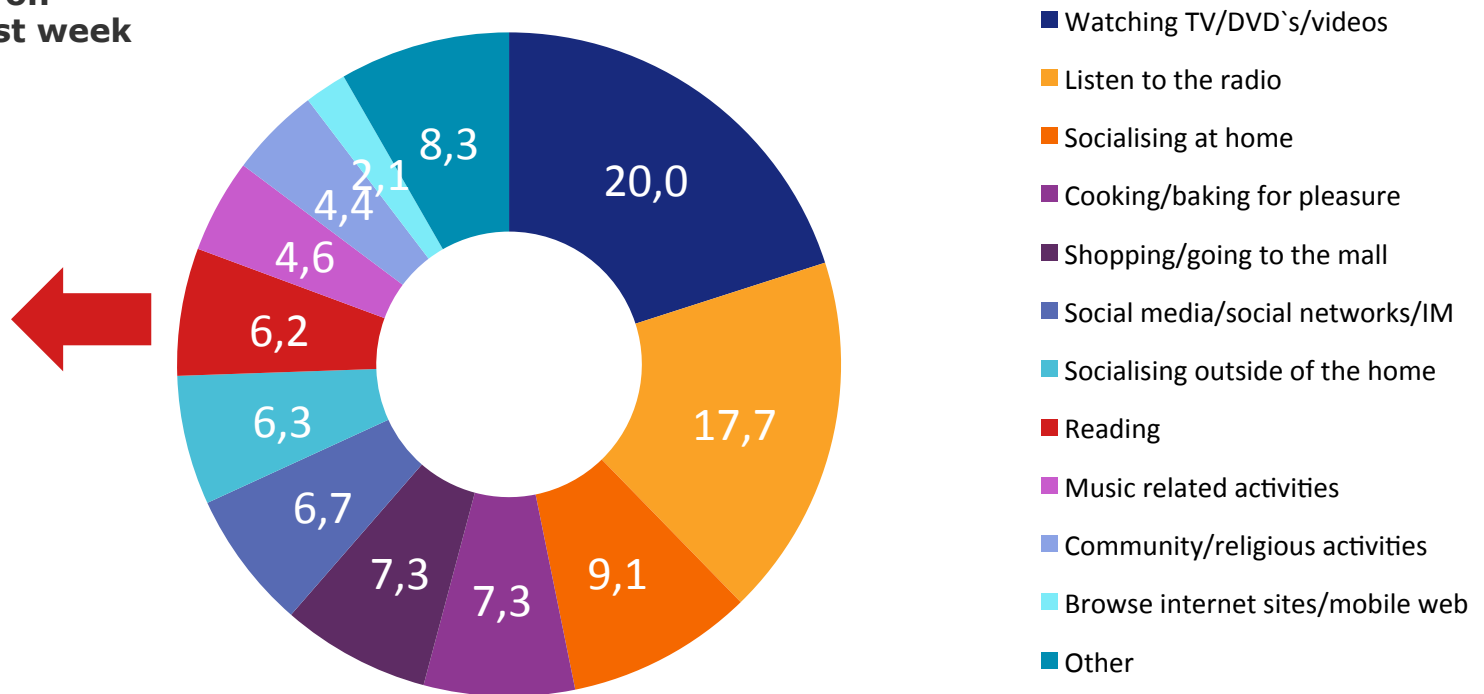


Reading constitutes 6.2% of SA adult leisure time – a lower proportion than its incidence would suggest



Share of time spent on leisure activities past week

In order of time spent doing an activity, reading drops to 8th place in share of leisure time – from 5th place in terms of doing the activity



Base: Total sample (n=4000)

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Readers spend an average of 4 hours/week reading – a relatively lower number than for many other activities



Average no. hours/week amongst people doing/considering activity*

Past month leisure activities	Share of time spent	Average no. hours/week amongst people doing/considering activity*
Listen to the radio	17.7%	6.3 hrs
Watching TV/DVD`s/videos	20.0%	7.5 hrs
Shopping/going to the mall	7.3%	4.0 hrs
Socialising at home	9.1%	5.5 hrs
Reading	6.2%	4.0 hrs
Cooking/baking for pleasure	7.3%	5.5 hrs
Social media/social networks	6.7%	6.3 hrs
Socialising outside of the home	6.3%	4.9 hrs
Community/religious activities	4.4%	3.7 hrs
Music related activities	4.6%	5.6 hrs
Internet sites/mobile web	2.1%	5.1 hrs
Play games on phone/tablet	1.2%	3.6 hrs
Physical activity	1.9%	4.2 hrs
Hobbies	1.7%	3.7 hrs
Attend stokvel	1.3%	3.6 hrs
Play card games/board games	0.7%	4.2 hrs
Cultural activities	0.4%	4.2 hrs
Crafts	0.4%	3.8 hrs
Gaming on internet/console	0.4%	3.5 hrs



Activities that adults tend to spend more time on are social ones which involve other people/family

Reading is a more solitary and intense activity – how to develop content that can be both easy to read in different contexts as well as making it more social?



*Base: Past month activities done/considered: Radio (n=3276), Watching TV/DVD (n=3375), Going to shopping malls (n=2515), Socialising at home (n=2515), Reading (n=2083), Cooking (n=1880), Social media (n=1855), Socialising outside of home (n=1978), Community (n=1577), Music (n=1499), Internet (n=901); Games on phone (n=654), Physical (n=794), Hobbies (n=630), Stokvel (n=464), Card games (n=334), Cultural (n=199), Crafts (n=150), Gaming (n=237)



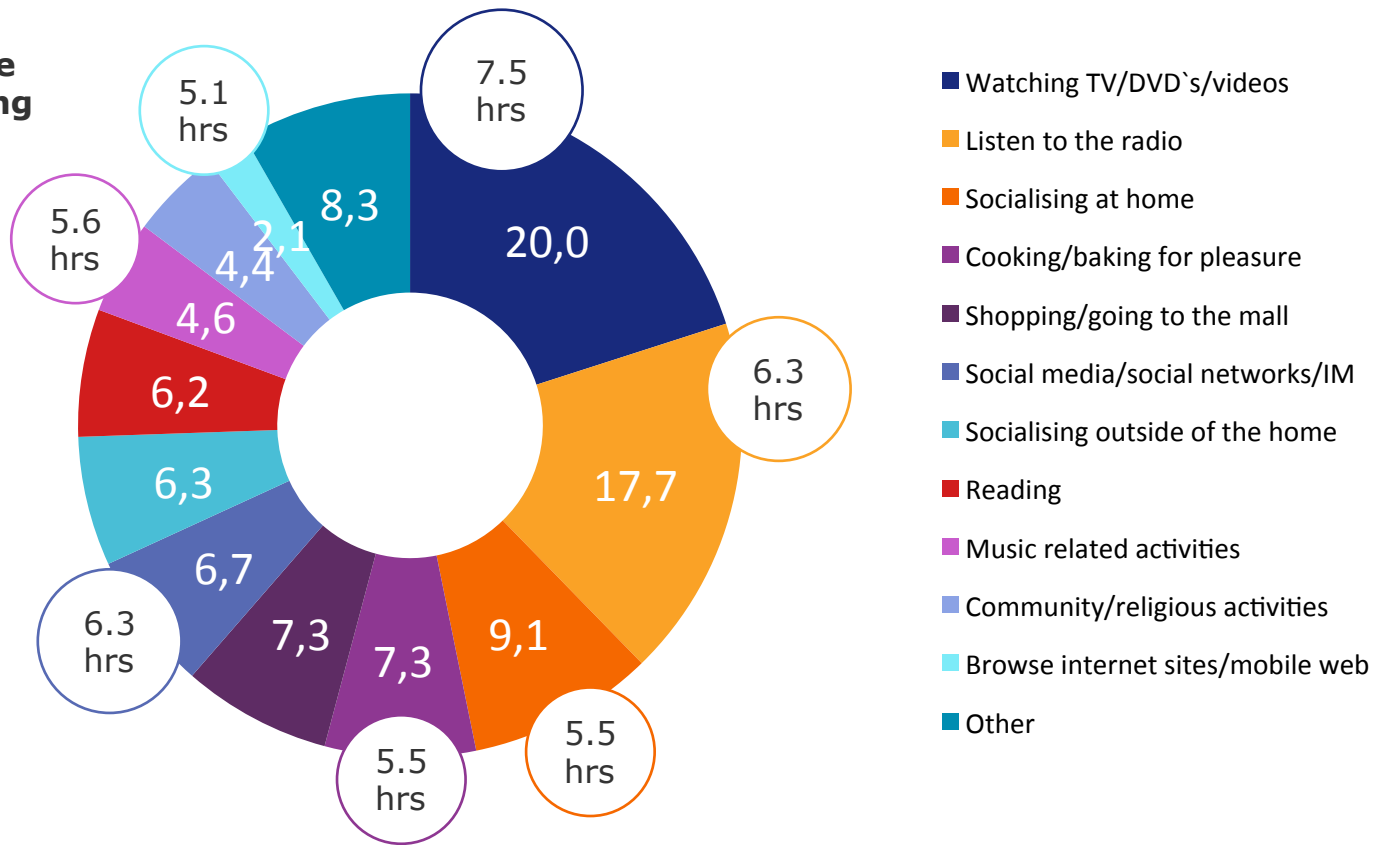
Readers spend an average of 4 hours/week reading – a relatively lower number than for many other activities



No. hours spent on leisure activities past week among 'doers'

Reading drops to 12th in terms of time spent doing an activity

4.0 hrs



x.x hrs

= average number of hours spent doing activity amongst people doing that activity
 Read: TV watchers spend an average of 7.5 hours per week watching TV



Base: Total sample (n=4000)

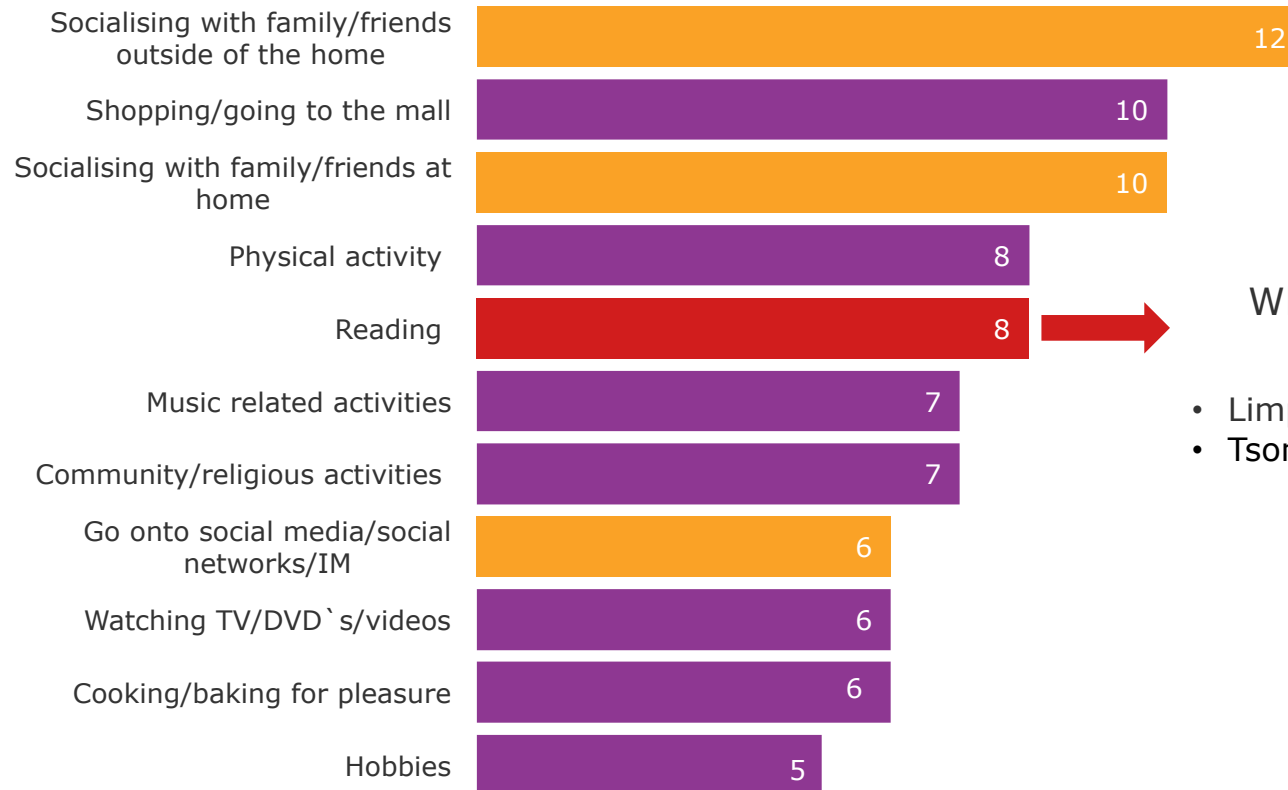
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An additional 8% of SA adults say they read occasionally or would consider reading in future



Leisure activities do occasionally or would consider doing in future



Who are these considerers?
(Disproportionately:)

- Limpopo (16% vs 9% total sample)
- Tsonga (7% vs 3% total sample)

Read: 8% would consider reading who currently aren't reading as a regular leisure activity



Base: Total sample (n=4000)

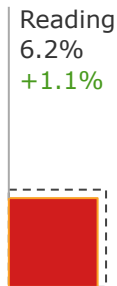
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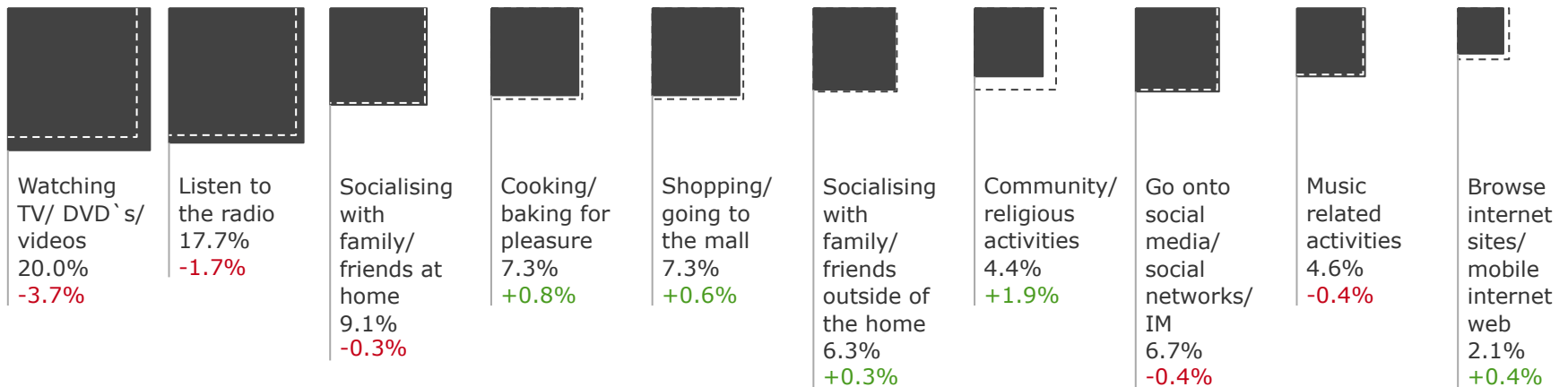
Reading's share of leisure time would increase to 7.3% if everyone was able to read as much as they wanted



Comparison between desire and share of leisure time for top activities



- Currently, reading constitutes **6.2%** of SA adults' leisure hours
- If everyone could do what they wanted, reading's share would increase by 1.1% to **7.3%** share



■ Your business
 ■ Other brand's current market share
 Projected market share

SAMPLE SIZE: n. 4000 [4000 weighted] // CUSTOM FILTERS APPLIED: None



Base: Total sample (n=4000)

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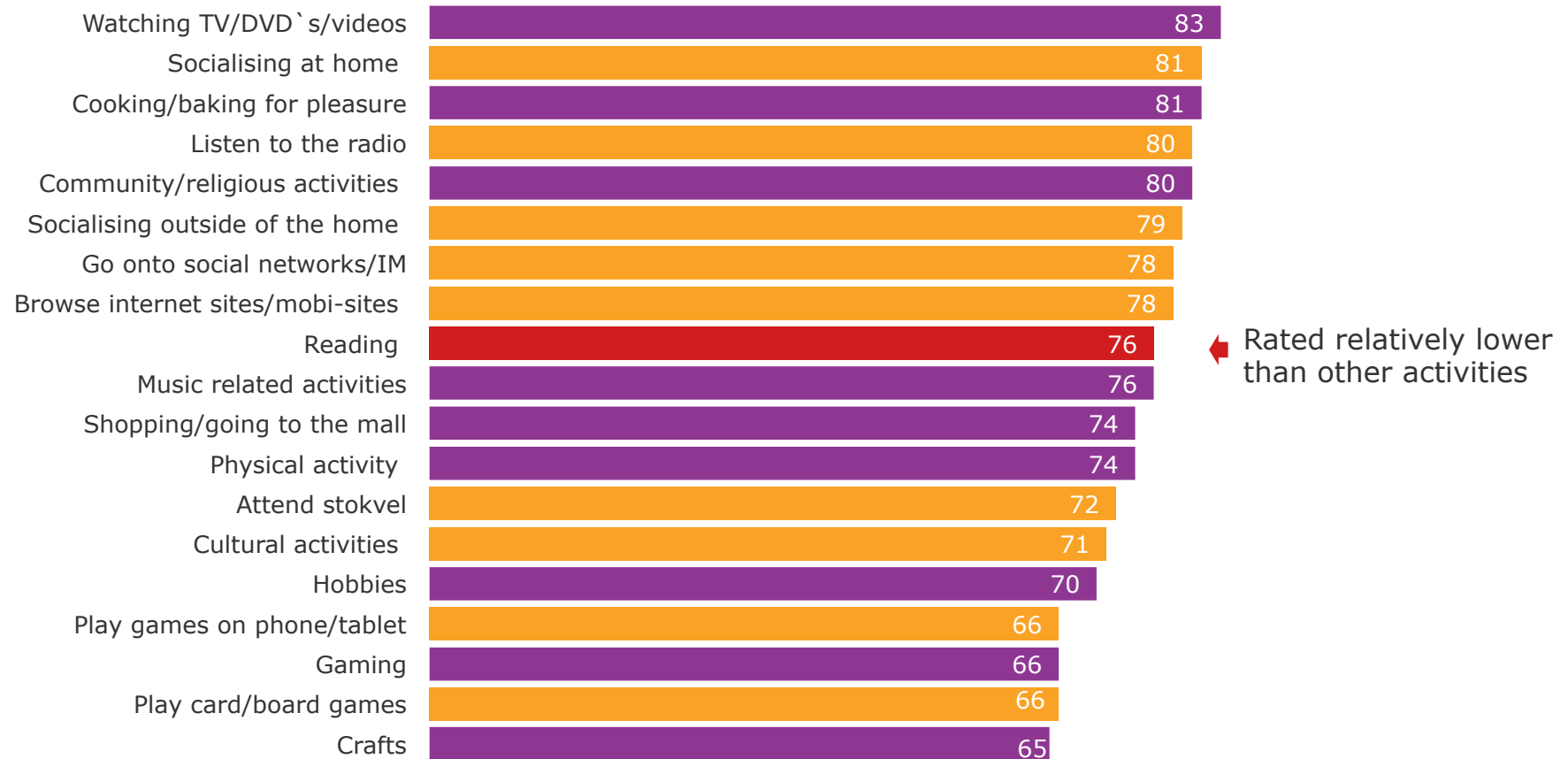
Reading needs to leverage its potential by creating new occasions for existing readers to do: giving them different reasons to read more e.g. tapping into everyday lives and realising community activities' potential



Reading is rated similarly to listening to music when assessing how well a leisure activity meets needs



Top 3 box satisfaction rating (8/9/10 out of 10) of leisure activities



Base: among "doers and considerers" of leisure activities

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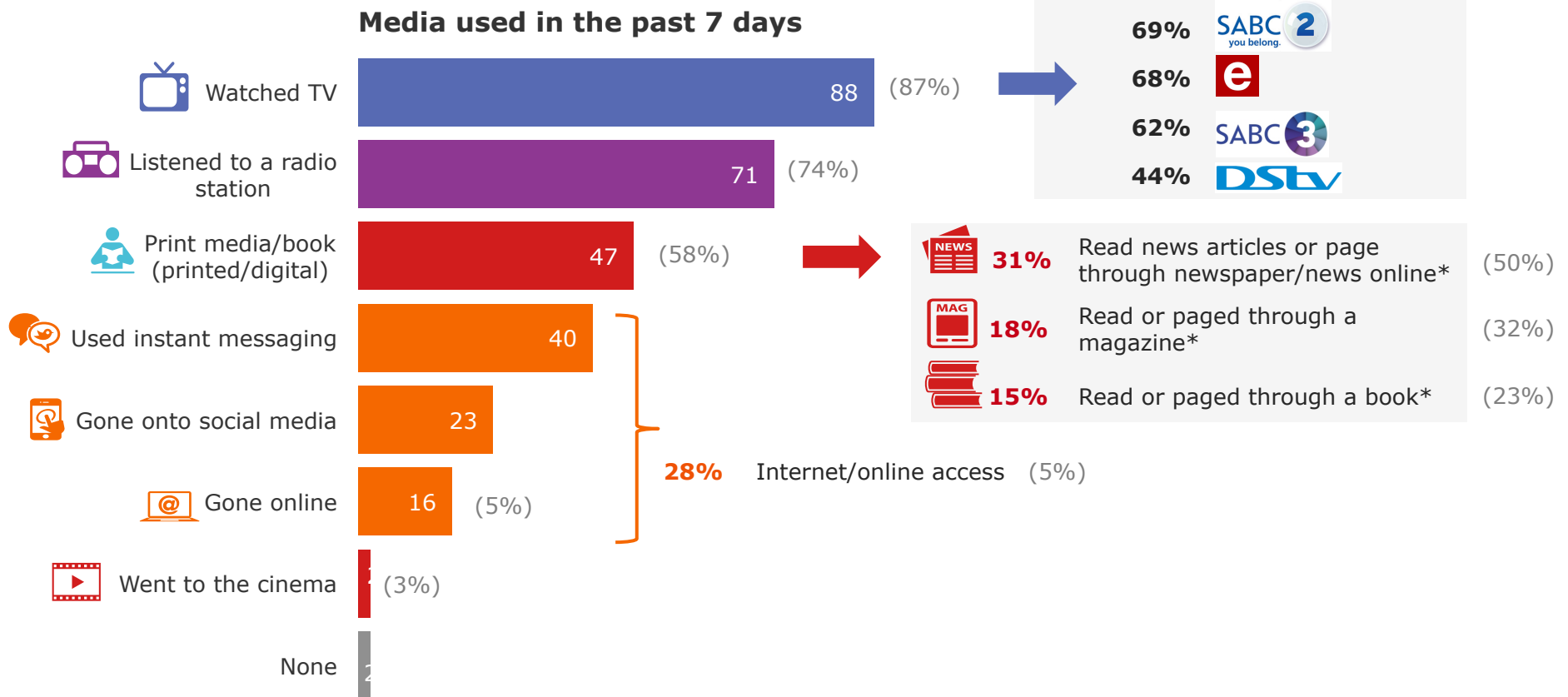
Reading requires active concentration and engagement unlike many other more passive activities.

How to create content that can complement these other activities and make it relevant for the context?



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Incidence of reading print media/books has dropped since 2006 (58%) to just below one-half of the SA adult population (47%)



Base: Total sample (n=4000)

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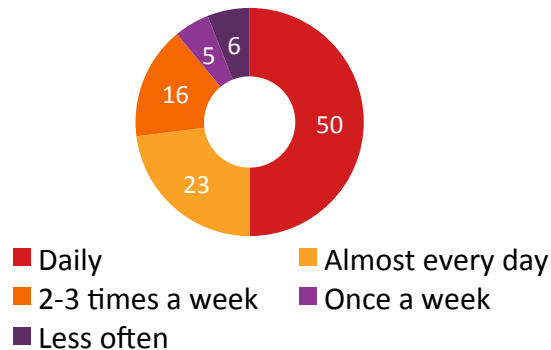
*Printed or digital
() 2006 figures



Digital usage: Online access most likely to be from mobile phones – low incidence of desktop or laptop usage



Internet frequency
n = 1228



Device used
n = 1228

- 72%** Smartphone
- 28%** Cellphone with internet access
- 13%** Laptop/MacBook
- 10%** Tablet
- 5%** PC

Device owned by province
n = 1228

		Total 100%	GP %	KZN %	WC %	EC %	LIM %	MP %	NW %	FS %	NC* %
Base size		1228	547	210	151	113	65	48*	40*	38*	**
Device for online	Smartphone	72	79	73	66	64	56	69	72	71	
	Cellphone with internet	28	22	30	22	31	45	34	33	26	
	Laptop	13	19	8	21	11	-	18	8	4	
	Tablet	10	17	7	12	5	1	8	2	9	
	Computer	5	5	5	11	2	1	7	5	-	

Base: Go online/access the internet (nett) (n=1228)

*Caution: small base size

** Base size too small to analyse (n<30)



3

Unpacking reading further

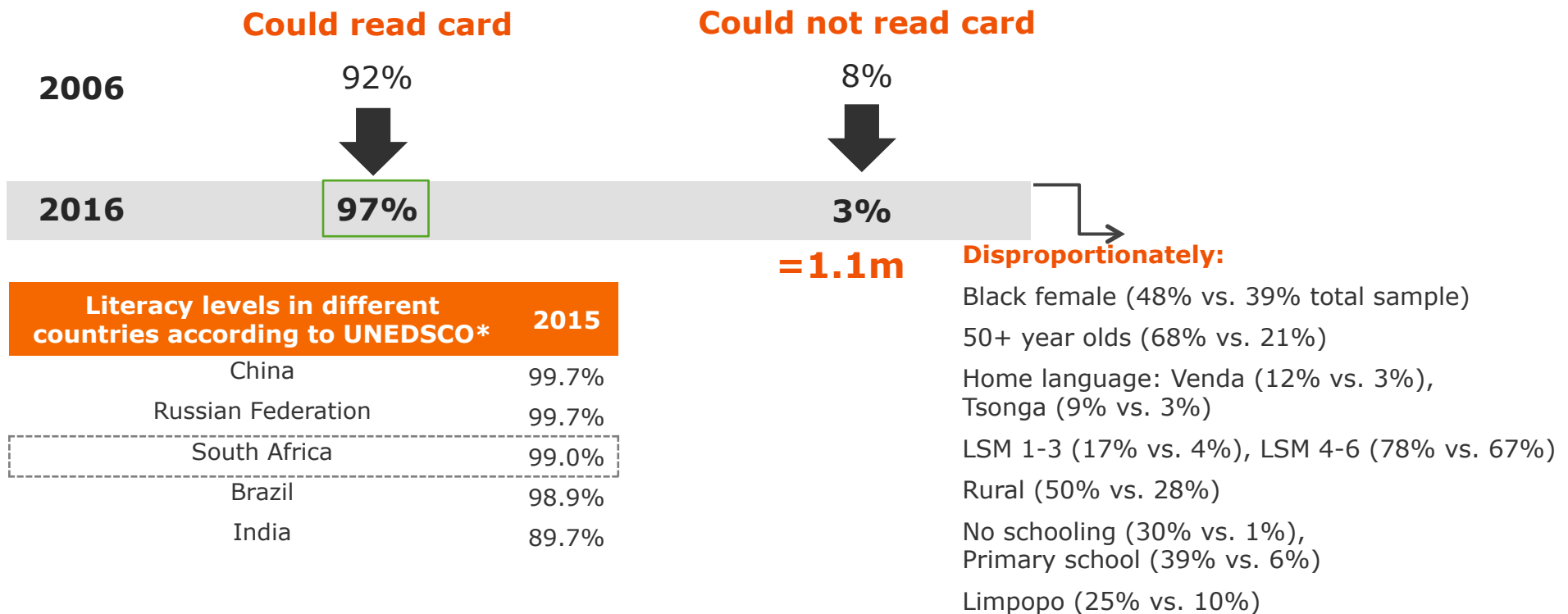


Almost universally, South African adults are able to read and understand at a basic level (based on TNS literacy card)



The introductory question of the survey asked respondents to read a card with text in the language of their choice. Their ability to do so overall was used to infer levels of literacy – which have improved since 2006

- Q: What is your favourite sport?
- Q: What is your favourite colour?
- Q: What is your favourite food?



Base: Total sample (n=4000)

- Higher than 2006
- Lower than 2006

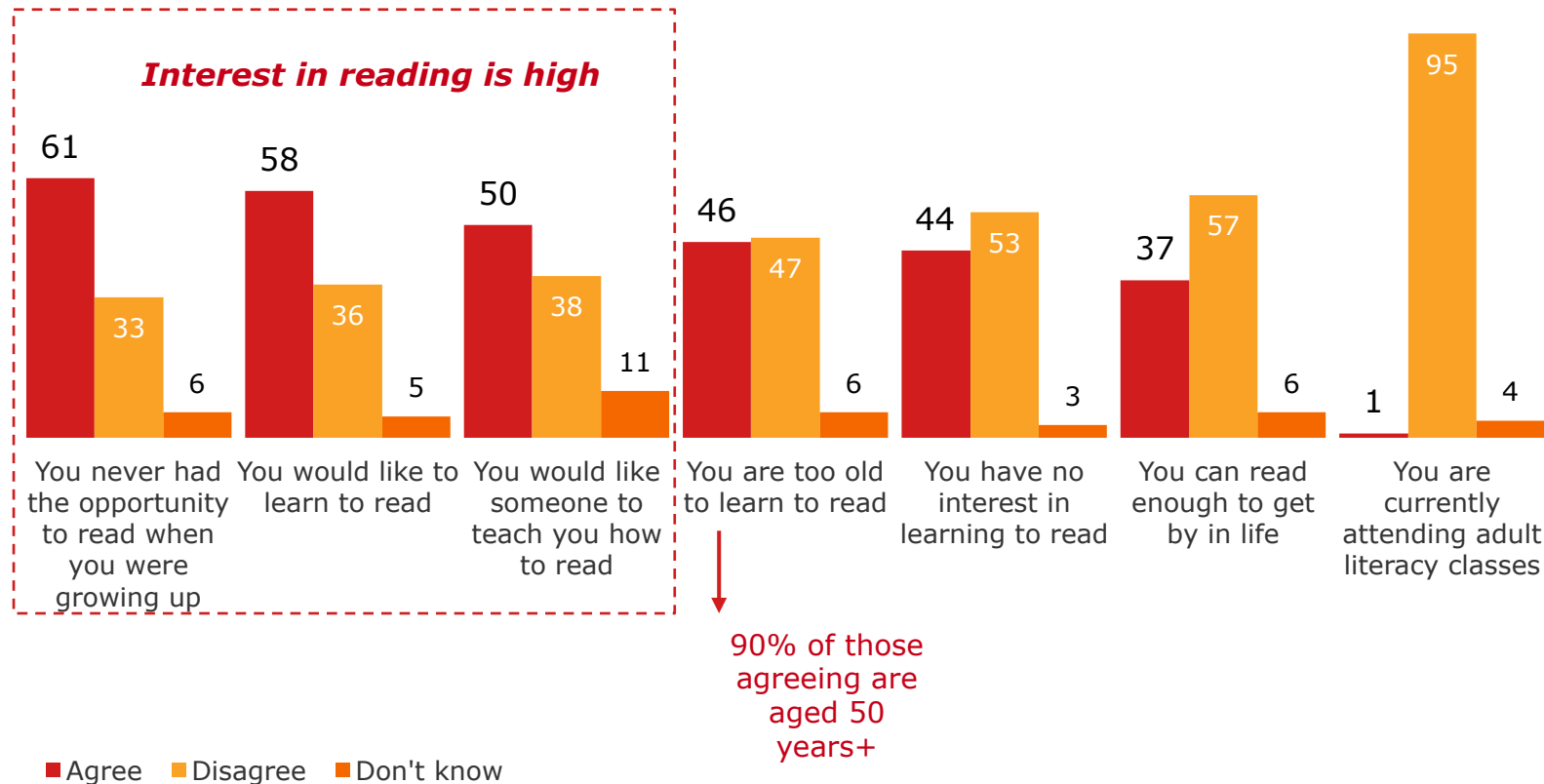
Source: UNEDSCO Institute for statistics <http://data.uis.unesco.org/Index.aspx?queryid=166>



Of those not able to read the card given to them, a lack of opportunity to read when growing up seems to be the highest claimed reason for not understanding



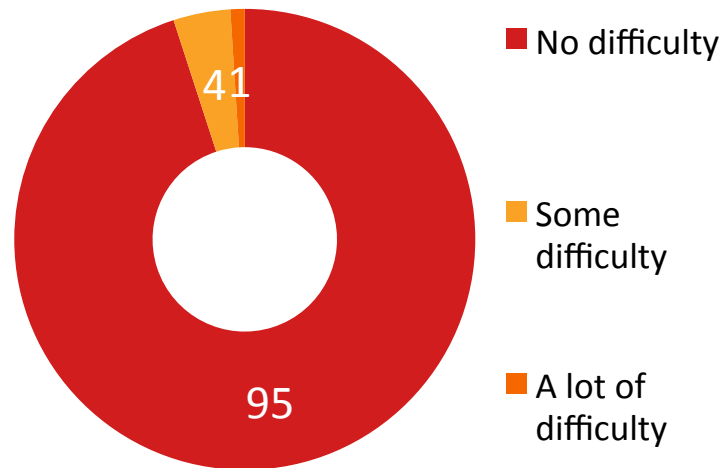
Interest in reading – amongst non-literate



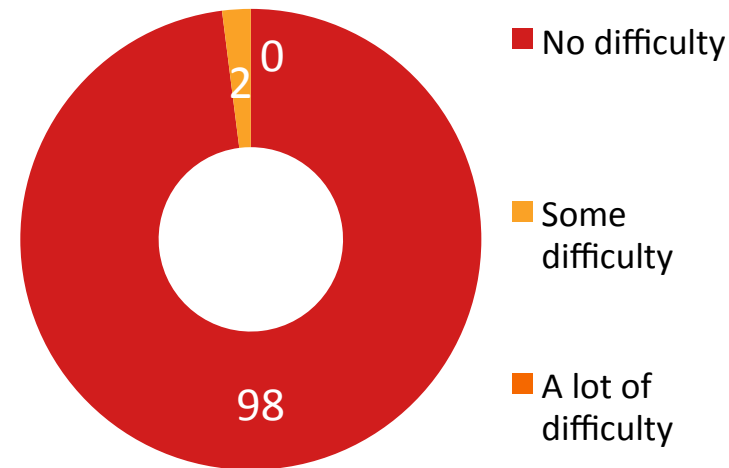


Overall, 5% of South Africans (1.8m) claim to experience some difficulty seeing – rising to 16% amongst those aged 50 years+

Claimed level of difficulty seeing



Claimed level of difficulty hearing



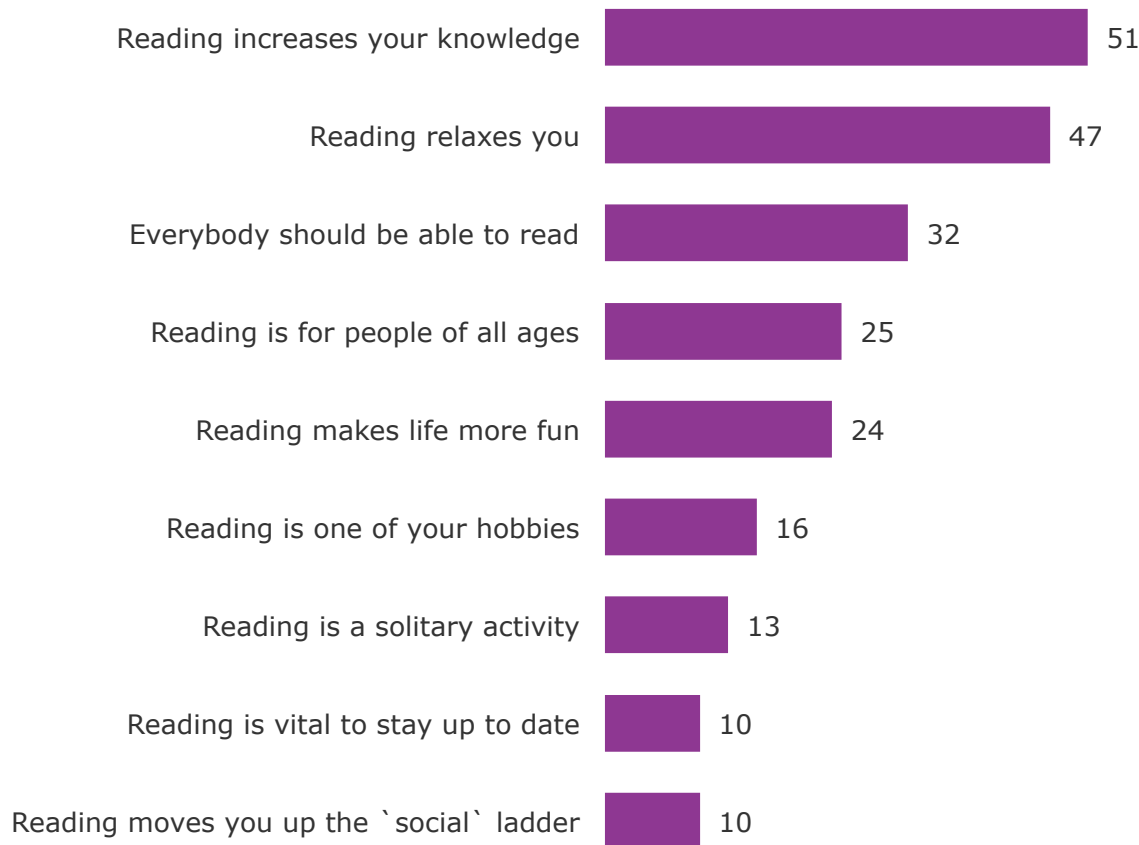
	50+ years
Base:	(n=815)
No difficulty	83
Some difficulty	13
A lot of difficulty	3



Agreement with positive statements about reading is low - only 9 of the 33 statements were agreed to by 10% or more of SA adults



Perceptions about reading (Positive statements 10%+)



- Agreement with reading increasing knowledge and being relaxing by one-half of adults
- One third saying that reading should be inclusive
- Lower association with reading being fun, being a hobby, having some social status or being kept up to date
- One in ten believe it is an activity to be done on one's own



Base: Total sample (n=4000)

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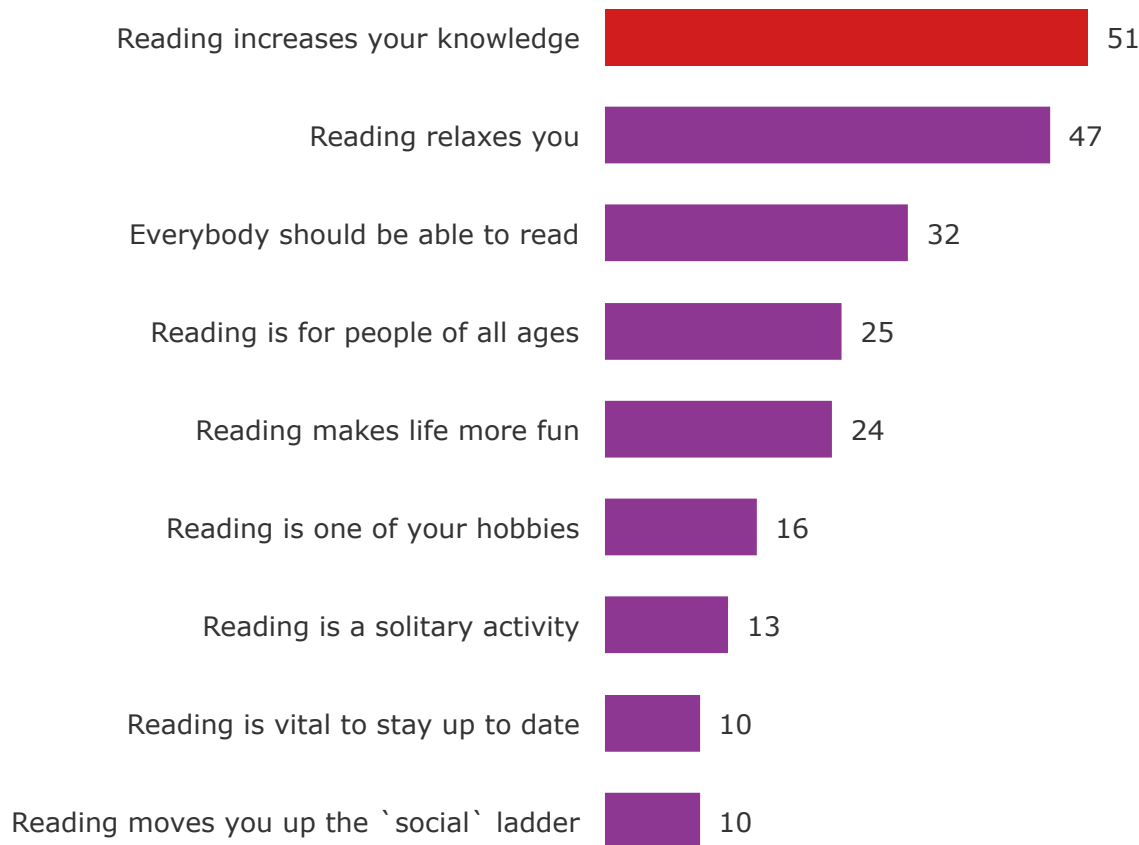
Overall low levels of agreement, especially for 'reading increases knowledge', highlight the need to change perceptions about reading's benefits and outcomes and ultimately to change behaviour around reading



'Reading increases your knowledge'



Perceptions about reading (Positive statements 10%+)



Reading increases your knowledge (51%)

- Metro 57%
- Mpumalanga 59%
- Gauteng 58%
- White female 74%
- White male 61%
- Coloured female 57%
- LSM 9-10 69%
- LSM 7-8 61%
- 16-17 yrs 71%
- Post matric 68%
- English 63%
- Afrikaans 60%



Base: Total sample (n=4000)

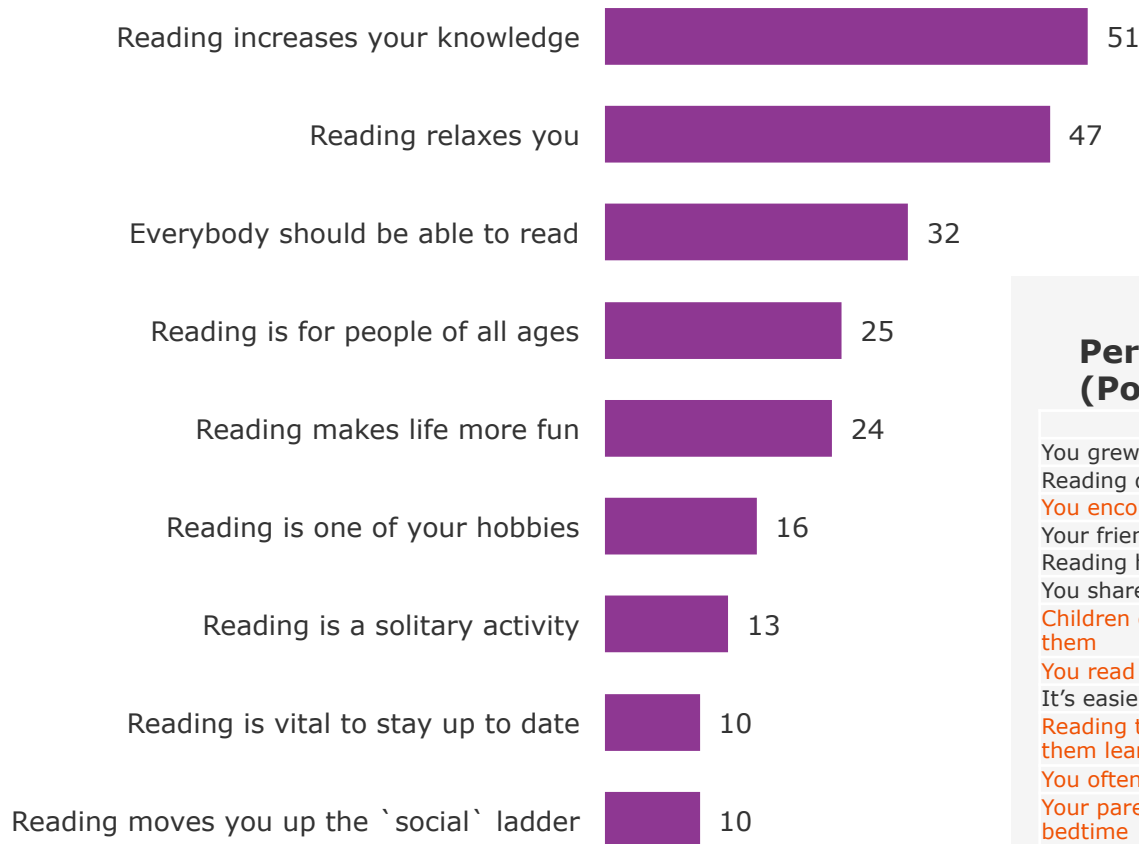
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Agreement about reading to children is very low – even amongst households with children



Perceptions about reading (Positive statements 10%+)



Perceptions about reading (Positive statements <10%)



Have kids

	%	%
You grew up where reading was encouraged	9	
Reading develops one`s imagination	9	
You encourage your children to read	9	13
Your friends all read a lot	8	
Reading helps you fall asleep	8	
You share your reading experiences	8	
Children do better in school when parents read to them	7	9
You read to your children	4	6
It`s easier to read nowadays because of the internet	4	
Reading to children before they can talk/read helps them learn	4	5
You often make up stories to tell children/family	3	5
Your parents read to you almost every day before bedtime	3	3
You prefer to read on your phone/tablet than on paper	3	



Base: Total sample (n=4000)

© TNS



Behaviour change needs to happen in the home with parents being empowered to create a reading culture

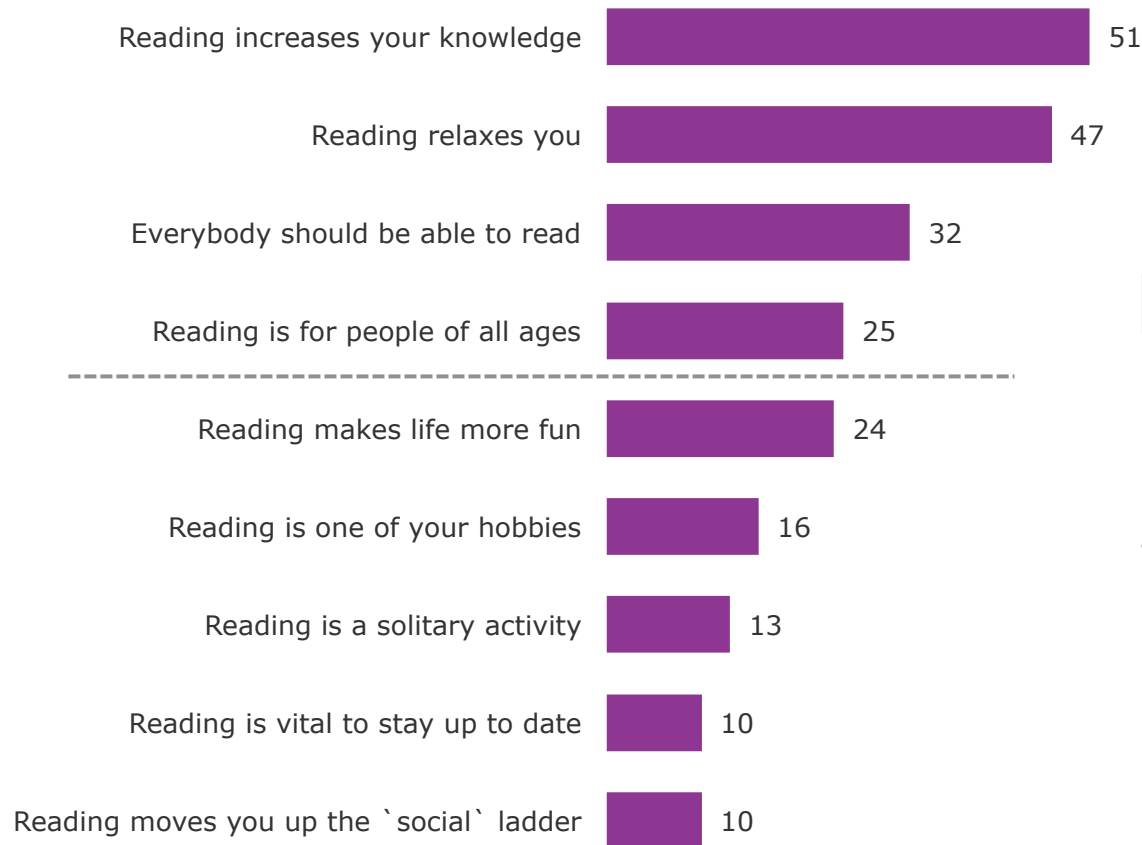


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The top statements are generally in line with those in 2006



Perceptions about reading (Positive statements 10%+)



- The top four are identical, except in a different order and with different levels of frequency
- Reading to 'develop imagination' has dropped out of the top list

Top 10 Perceptions in 2006

Gives you access to knowledge	65%
Everybody should be able to read	47%
Relaxes you	45%
Is for people of all ages	41%
Broadens your mind	39%
Makes life more fun	31%
Develops one's imagination	29%
Vital for staying up to date	28%
Is a solitary activity	27%
Gives you something to talk about with friends	26%



Base: Total sample (n=4000)

© TNS



Attitudes to reading: negative statements



Perceptions about reading (Negatively worded statements)

	%
You don't enjoy reading	10
Reading is a luxury	10
There is no time to read in your daily life	9
Reading is boring	7
You would rather watch TV or play video games than read	6
Reading is not a big thing in your family or home	4
There`s no point reading to children until they have learned to read themselves	1

6% = **2.2m** adults

Physical barriers	6
You have poor eyesight so find it very difficult to read	3
You would read more if you had reading glasses	2
You have a reading disorder so find it difficult to read	2
It is difficult to read at home because don't have proper lighting	1

6% incidence rises to:

- Limpopo: 12%
- LSM 1-3: 11%
- 50+ yrs: 10%
- No schooling: 11%, primary schooling: 14%
- Tsonga: 13%; Venda: 14%



Base: Total sample (n=4000)

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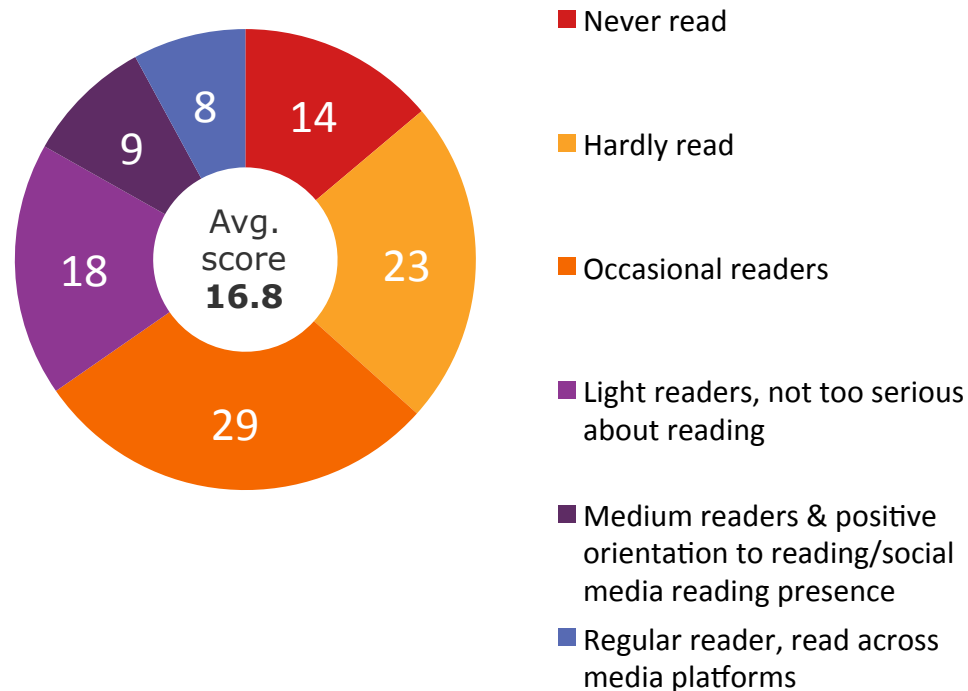
Lack of interest, time and physical barriers appear as key areas to overcome



Results of a modelled reading index (taking into account reading attitudes and behaviour) indicate that SA adults are very 'light' readers overall, with two-thirds falling into low involvement segments



Reading index segments





Not surprisingly, English is the language that most adults claim to be reading in. Few cite preferring to read in their home (African) language

Languages spoken vs. read in vs. preferred

	Home language	Language read in	Preferred language
n=	2887	2874	2874
Nguni	45	31	19
IsiZulu/Zulu	25	20	12
IsiXhosa/Xhosa	16	10	6
Siswati/Swazi	3	3	2
IsiNdebele/South Ndebele/North Ndebele	1	1	*
Sotho	24	11	5
Sesotho/Southern Sotho/Sotho	8	4	2
Sepedi/Northern Sotho	8	4	1
Setswana/Tswana	8	4	1
Afrikaans	14	16	11
English	12	81	64
Xitsonga/Tsonga	3	1	*
Tshivenda/Lemba/Venda	2	1	1

61% reading in one language
 34% reading in 2 languages
 5% reading in 3+ languages



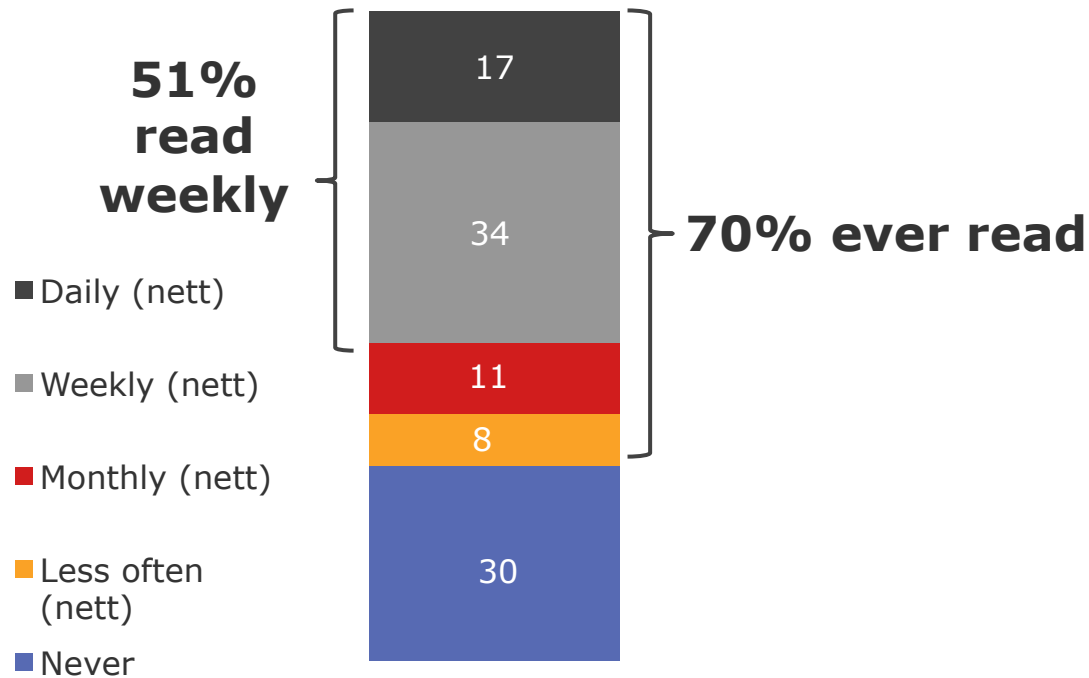
Base: Ever read for leisure (n=2887)

Note: Home and preferred language were single mention; usually read in is multiple mention

In total, one-half of SA adults claim to read for leisure at least once a week, with a further 1 in 5 claiming to read less often – making up an 'ever read' incidence of 70%

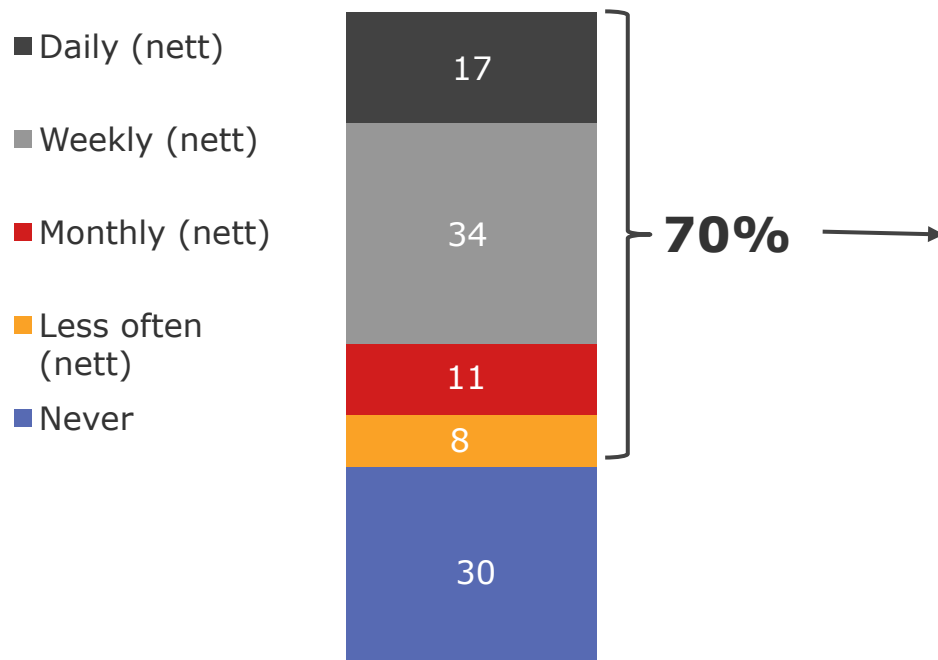


Frequency of reading for leisure
2016



Frequency of ever reading for leisure also increases with SEC levels, education and with younger ages

Frequency of reading for leisure 2016



Ever read for leisure (70%)



- Metro 77%
- Gauteng 77%
- White female 88%
- Indian/Asian 84%
- White male 76%
- LSM 9-10 85%
- LSM 7-8 81%
- 16-17 yrs 85%
- 18-24 yrs 75%
- Post matric 88%
- High school 74%
- English 81%
- Afrikaans 76%

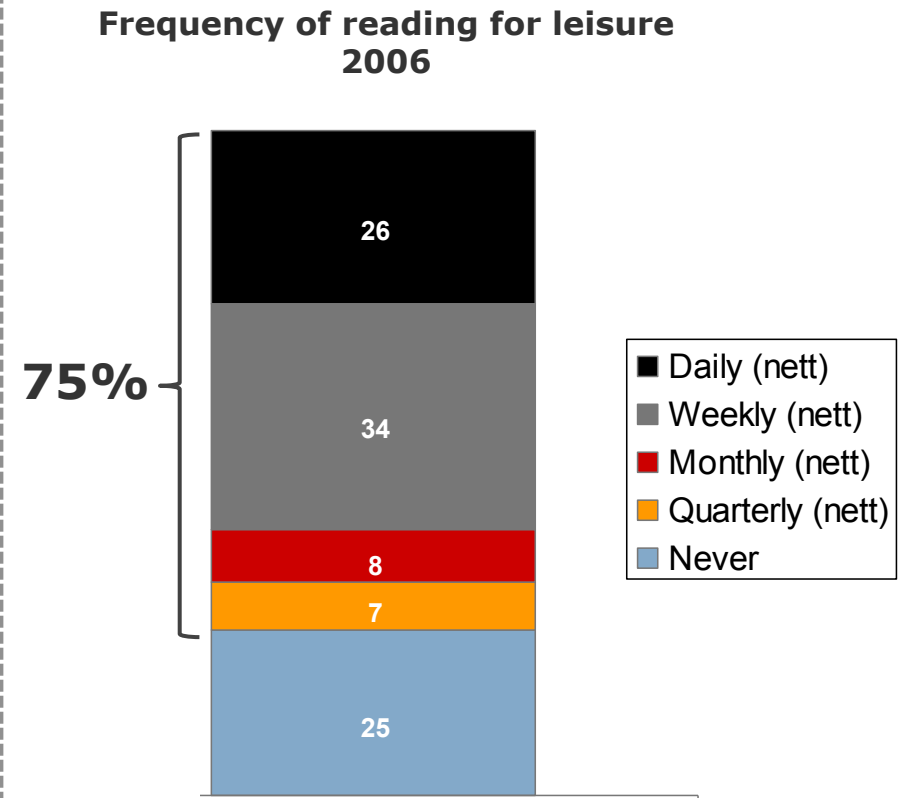
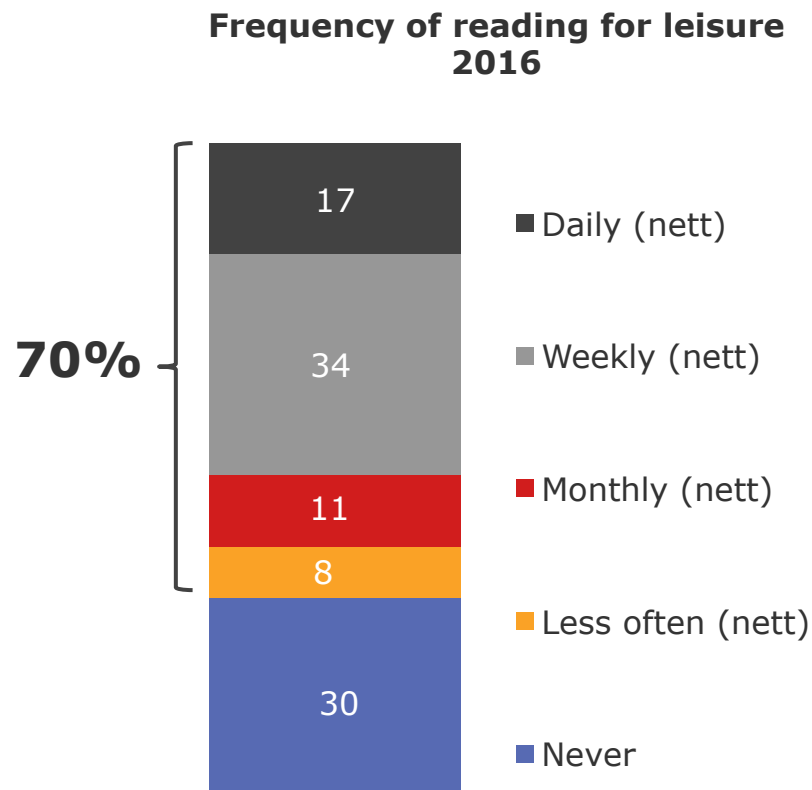
Never read for leisure (30%)

- Rural 37%
- North West 44%
- Limpopo 41%
- Free State 41%
- N. Cape 41%
- Black female 34%
- LSM 1-3 51%
- 50+ yrs 38%
- No schooling 87%
- Primary schooling 59%
- Venda 40%
- Sotho 37%



Base: Total sample (n=4000)

Frequency of ever reading for leisure has declined significantly since 2006, dropping from 75% to 70% of SA adults. Decrease driven by declines in daily reading



Base: Total sample (n=4000)

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In a time poor environment, what needs to happen to get more adults reading daily again?

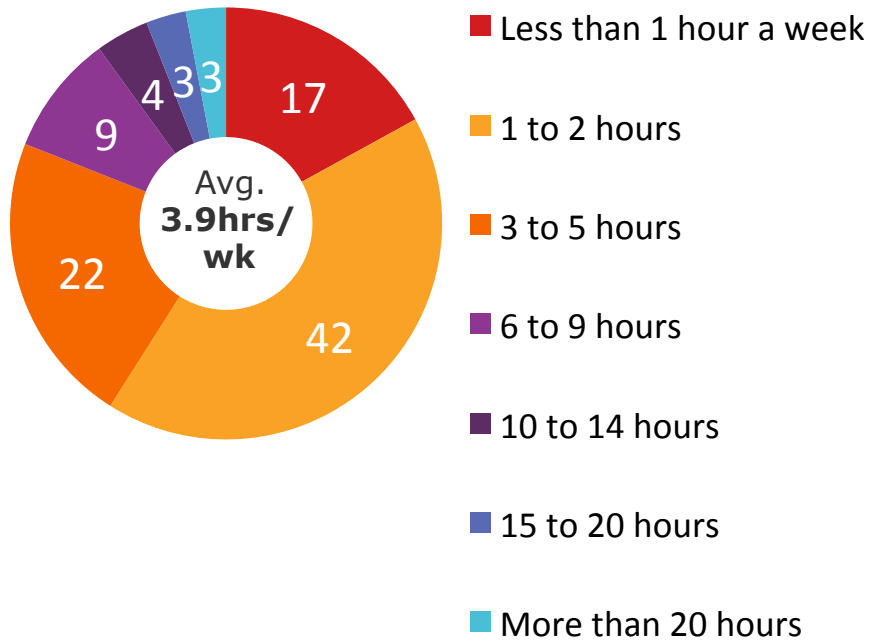


Leisure readers spend an average of 4 hours/week reading – rising to over 6 hours/week amongst white men & women



Time spent reading for leisure per week

18% spending 6+ hours per week reading for leisure



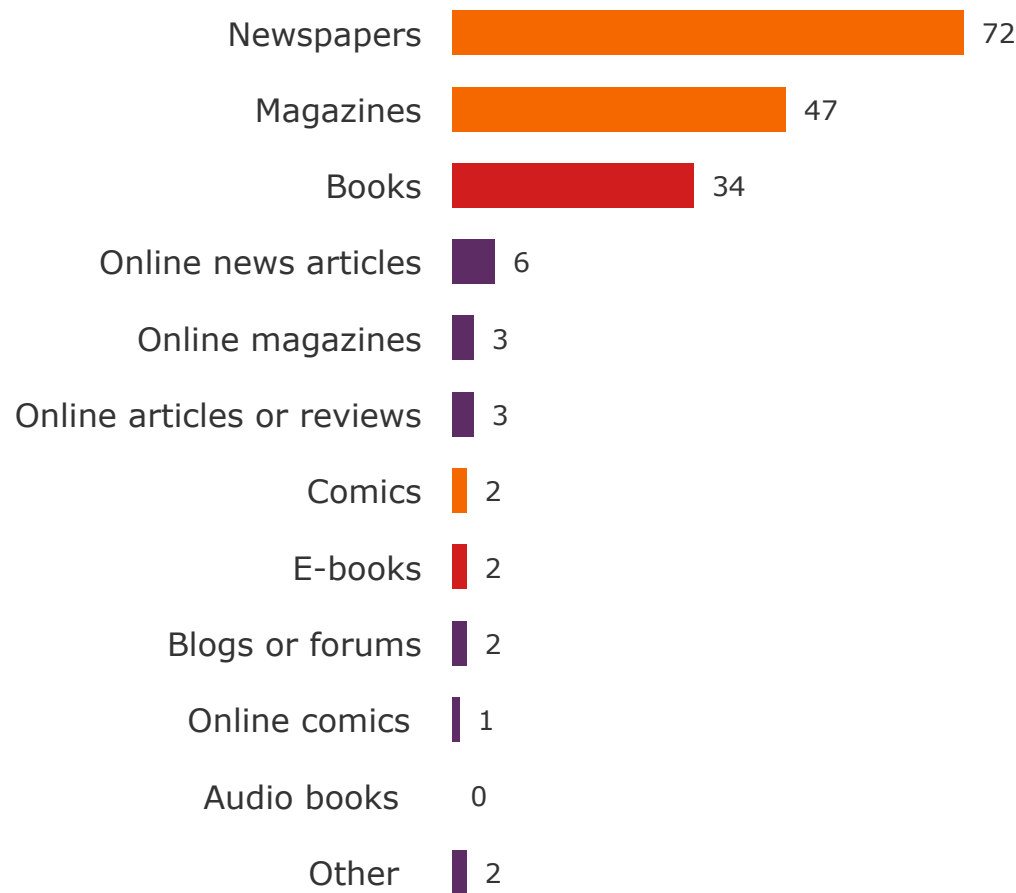
Average number of hours read for leisure (3.9)

• E. Cape	5.8
• W. Cape	4.6
• White male	6.8
• White female	6.3
• LSM 9-10	5.6
• 50+ yrs	4.8
• Post matric	4.8
• Afrikaans	5.1
• English	4.8

One third of leisure readers claim to be reading books – lagging behind other printed material; digital reading is still low overall



Materials read in leisure time



Average number of materials generally read:
1.7/12

Printed/paper (nett) 97%

Books (nett) 35%

Online/digital (nett) 10%



Base: Leisure readers (n=2887)

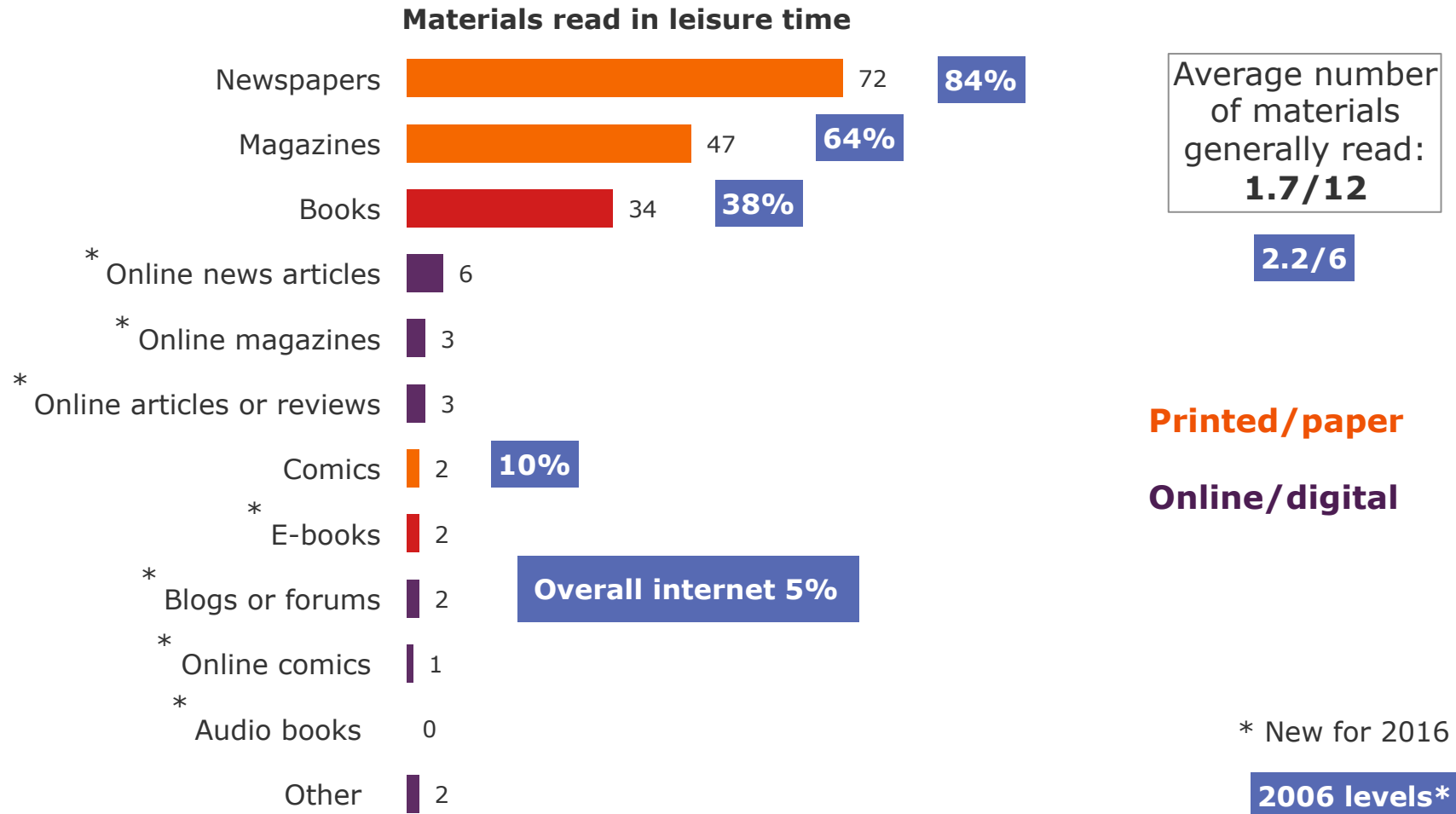
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Whilst not defined, newspapers are likely to be local community newspapers – a perfect medium within which to drive reading books at the community level



Printed material reading has declined from 2006 levels – reading printed books has dropped from 38% to 34%



Base: Leisure readers (n=2887)
Note: in 2006, the books measure is a nett of fiction and non-fiction books

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Incidence of reading printed books has dropped from 2006; however, the size of the total book reading market has increased by 13% and 1.03m readers



	2006	2016
Total population size:	28.82m*	38.12m
Read printed books % (as % of total):	28%	24%
Printed book reading population:	8.20m	9.23m

2006 levels



* Source: Project Bookworm 2006

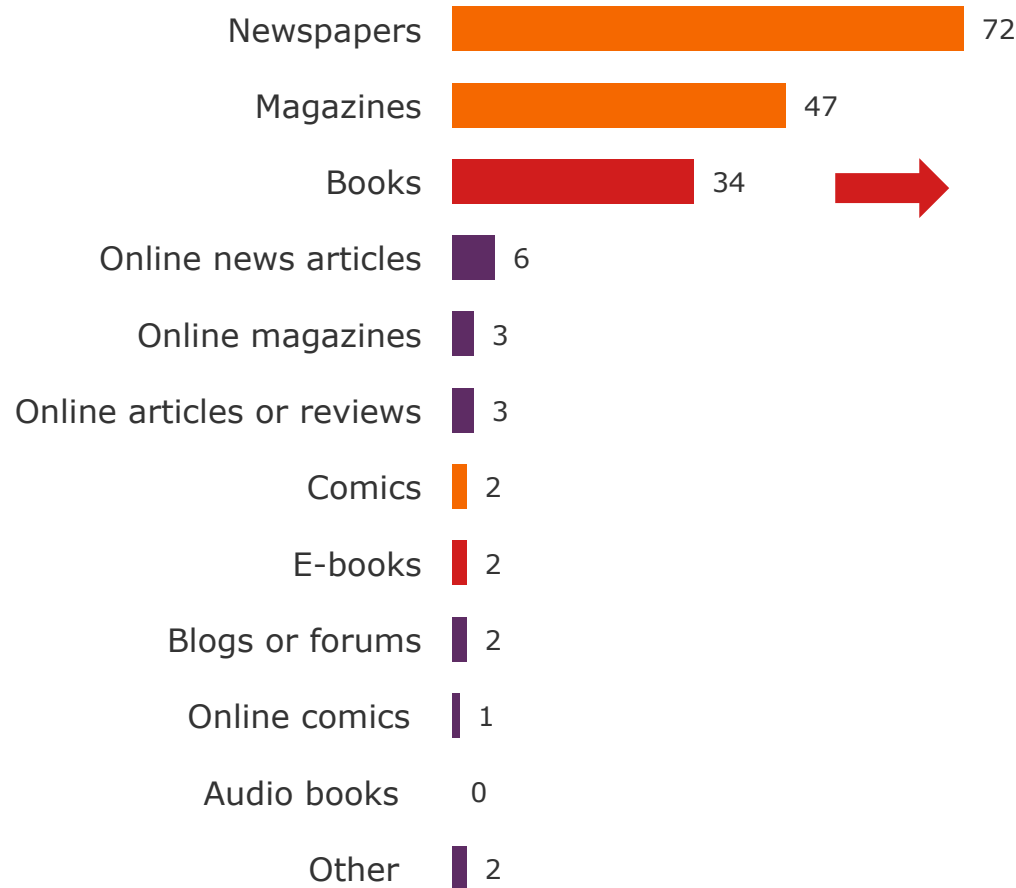
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Who is most likely to read printed books?



Materials read in leisure time



Read printed books (34%)

- Mpumalanga 39%
- North West 38%
- Gauteng 37%
- White female 53%
- Coloured female 41%
- LSM 9-10 44%
- LSM 7-8 41%
- 16-17 yrs 62%
- 18-24 yrs 45%
- Post matric 47%
- English 41%
- Venda 41%

Base: Leisure readers (n=2887)



Just over one-quarter of newspaper readers currently read printed books vs. a higher % of magazine readers (35%)



Cross-reading levels

	Printed Books	Newspapers	Magazines
Base: readers	(983)	(2111)	(1422)
	%	%	%
Newspapers	57	100	71
Magazines	48	46	100
Printed books	100	27	35
E-books	3	1	1
Audio books	1	0	0
Avg. no read	2.3	1.9	2.3

Read: 57% of book readers also read newspapers



© TNS



Reading books is higher among current magazine readers – what can we take from that to drive up book reading amongst newspaper readers?

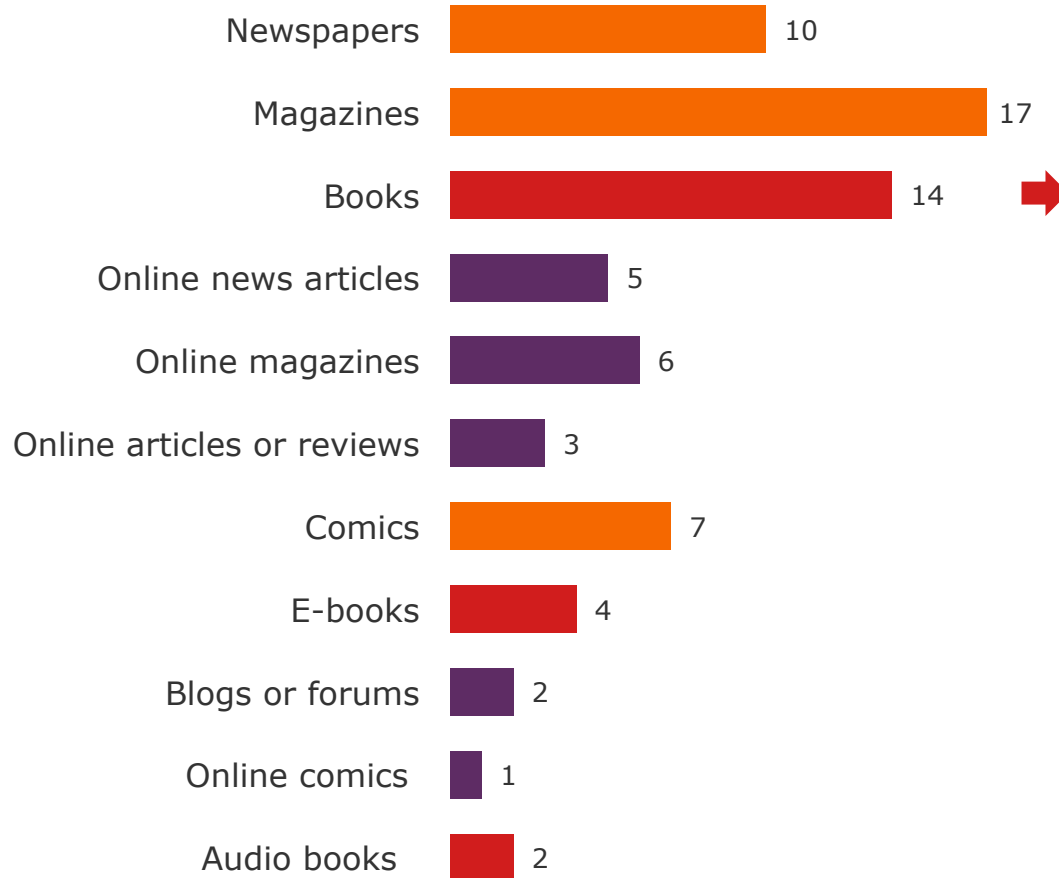


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An additional 14% of SA leisure readers say they would consider reading printed books in future; total potential among readers is 48% (34% currently read and 14% would consider)



Reading materials would consider reading in future



Read: 14% would consider reading printed books who currently aren't reading them regularly

Who are they more likely to be?

- Metro (47% vs 41% total sample)
- Gauteng (32% vs 25%)
- Indian/Asian (6% vs 3%)
- 16-17 years old (5% vs 3%)
- Matriculated (52% vs 47%)

Printed/paper (nett) +1%

Books (nett) +15%

Online/digital (nett) +8%



Base: Leisure readers (n=2887)

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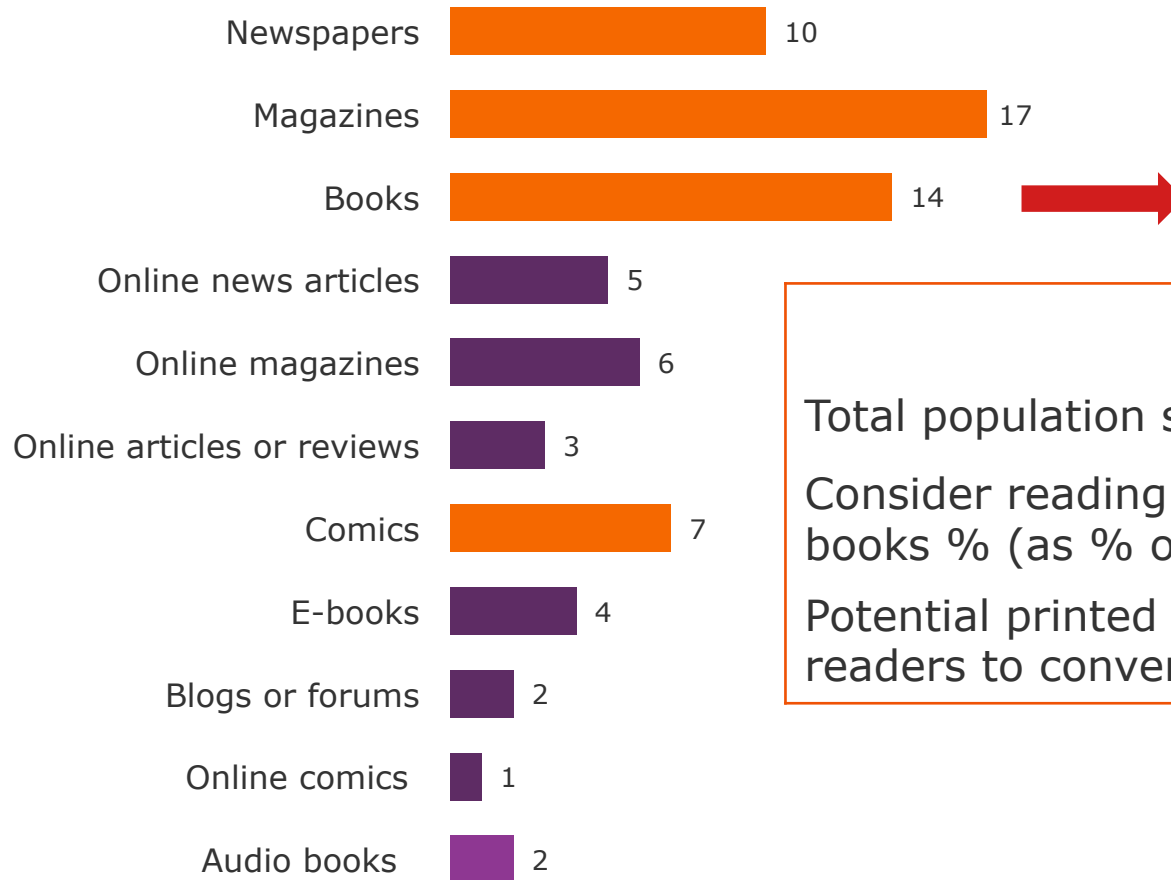
Gauteng would be the key province to target for focused initiatives



An additional 14% of SA leisure readers translates into a potential new printed book reading audience of an additional 3.8m adults



Reading materials would consider reading in future



	2016
Total population size:	38.12m
Consider reading printed books % (as % of total):	10%
Potential printed book readers to convert:	3.8m



Base: Leisure readers (n=2887)

© TNS



Converting this potential means having the right product in the right place in the right context



Book readers vs. total readers are disproportionately younger, LSM 9-10, post-matric and white females

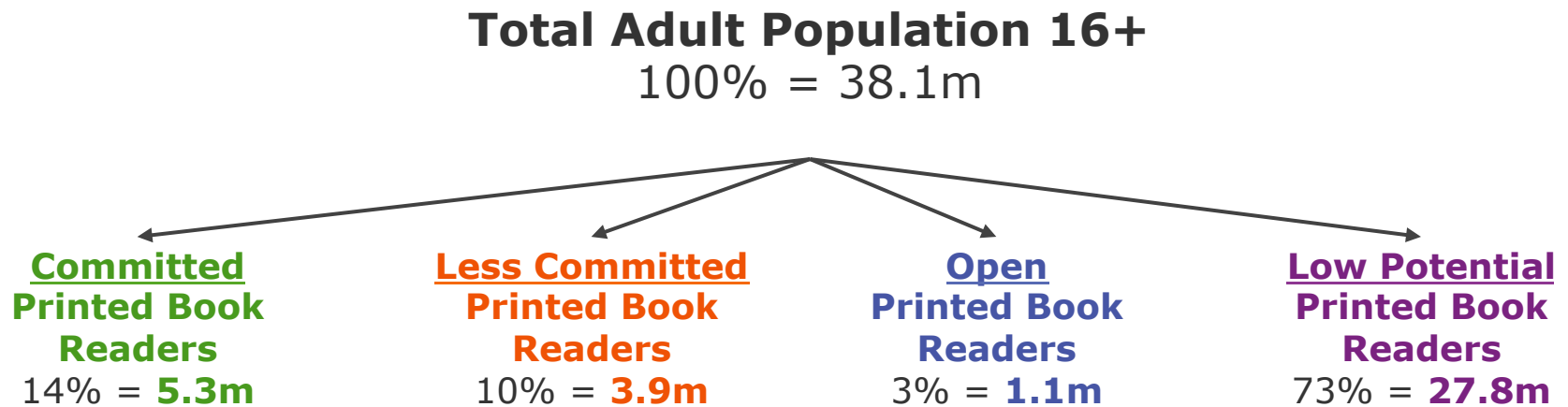


Profile of past month readers vs. (any) book readers

	Total n= %	Past Month Readers (1784)	Any Book Readers (1009)		Total n= %	Past Month Readers (1784)	Any Book Readers (1009)
Metro	41	45	45	LSM 1-3	4	2	2
Small urban	30	31	31	LSM 4-6	67	62	56
Rural	28	24	24	LSM 7-8	19	22	25
				LSM 9-10	10	14	17
Gauteng	26	28	30	16-17 years	4	4	8
KZN	18	17	17	18-24 years	23	25	32
W Cape	12	12	12	25-34 years	26	26	23
E Cape	12	13	12	35-49 years	26	26	21
Limpopo	10	9	8	50+ years	21	19	17
Mpumalanga	8	9	9	Have children	53	51	51
Free State	5	4	3	No children	47	49	49
North West	7	7	6	No schooling	1	0	0
N Cape	2	2	2	Primary schooling	6	3	2
Black male	39	39	37	Some high school	31	27	25
Black female	39	35	36	High school completed	47	51	46
White male	5	6	5	Post-matric	15	20	26
White female	5	7	10	Nguni	44	41	41
Coloured male	5	4	4	Sotho	27	26	24
Coloured female	4	5	5	Afrikaans	13	14	15
Indian/Asian	3	4	2	English	10	13	14
				Tsonga	3	3	3
				Venda	3	2	3

Unpacking book readers further ...

By overlaying a measurement of desire* to read books on printed book reading behaviour, we can identify the true 'Bookworms' – the Committed Book Readers



Bookworms

Vs. **4.2m** in 2006 (14%)

What key demographics differentiate each of these printed book reading segments?



Committed Book Readers 14% = 5.3m

- White female (11% vs. 5% in total sample)
- LSM 7-8 (23% vs. 19%)
- LSM 9-10 (16% vs. 10%)
- 16-17 yrs (9% vs. 4%)
- 18-24 yrs (29% vs. 23%)
- English (14% vs. 10%)
- No children (52% vs. 47%)
- Post matric (23% vs. 15%)
- Afrikaans (16% vs. 13%)
- English (14% vs. 10%)

Less Committed Book Readers 10% = 3.9m

- White female (7% vs. 5% in total sample)
- Coloured female (6% vs. 4%)
- Metro (49% vs. 41%)
- LSM 7-8 (29% vs. 19%)
- LSM 9-10 (16% vs. 10%)
- 16-17 yrs (6% vs. 4%)
- 18-24 yrs (35% vs. 23%)
- Gauteng (33% vs. 26%)
- Mpumalanga (12% vs. 8%)
- Post matric (28% vs. 15%)
- English (13% vs. 10%)

Open Book Readers 3% = 1.1m

- 25-34 yrs (36% vs. 26% in total sample)
- Nguni (55% vs. 44%)

Low Potential Book Readers 73% = 27.8m

- Rural (30% vs. 28% in total sample)
- KZN (19% vs. 18%)
- Free State (6% vs. 5%)
- Black male (40% vs. 39%)
- Black female (40% vs. 39%)
- LSM 4-6 (71% vs. 67%)
- 25-34 yrs (27% vs. 26%)
- 35-49 yrs (28% vs. 26%)
- 50+ yrs (23% vs. 21%)
- Primary school (8% vs. 6%)
- Some high school (32% vs. 31%)
- Nguni (45% vs. 44%)
- Sotho (28% vs. 27%)



Significantly higher compared to total

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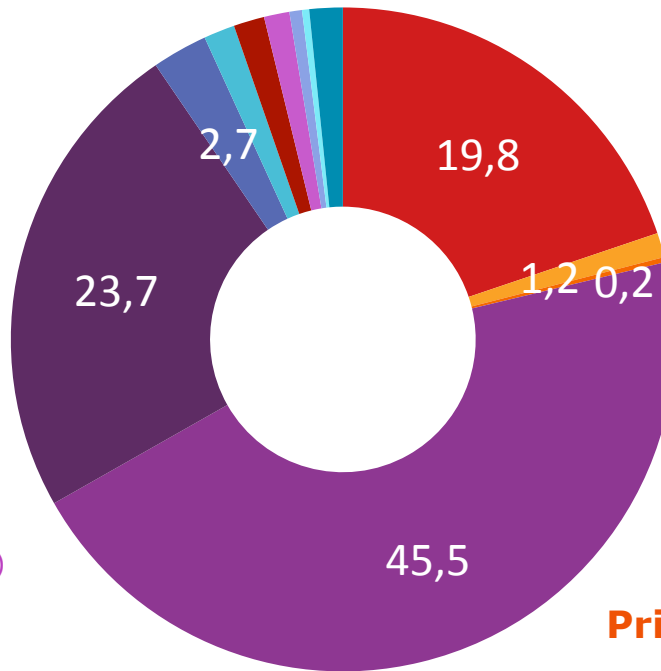


Reading 'any type of books' constitutes 21.3% of total reading time



Share of reading time spent on reading materials

- Books (19.8%)
- E-books (1.2%)
- Audio books (0.2%)
- Newspapers (45.5%)
- Magazines (23.7%)
- Online news articles/news sites (2.7%)
- Online magazines/magazine articles (1.5%)
- Comics (1.5%)
- Online articles or reviews (1.2%)
- Blogs or forums (0.6%)
- Online comics (0.3%)
- Other specify (1.6%)



Any books = 21.3%

Printed/paper (nett) 90.5%
Books (nett) 21.3%
Online/digital (nett) 7.6%



Base: Leisure readers (n=2887)

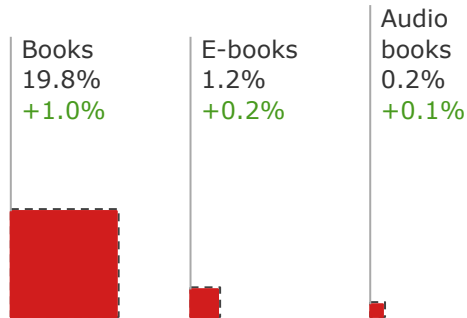
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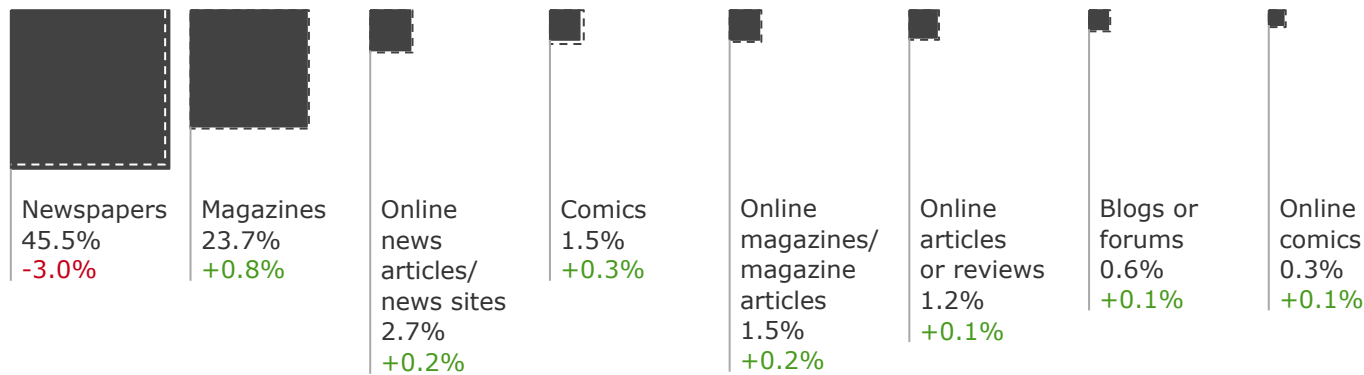
All reading materials, including all book formats, have potential to grow share of reading time – gaining from newspapers



Comparison between desire and share of reading time



- If everyone could read what they wanted, (printed) books' share would increase by 1.0% to **20.8%** share; e-books' would increase to 1.4% and audio books' share to 0.3%
- Compared to a normative database, books are **not leveraging their potential** to build desire adequately enough
- To realise share increases, more needs to be done to make book reading more attractive – especially amongst **current book readers**



■ Your business
 ■ Other brand's current market share
 Projected market share

SAMPLE SIZE: n. 2887 [2818 weighted] // CUSTOM FILTERS APPLIED: None



Base: Leisure readers (n=2887)

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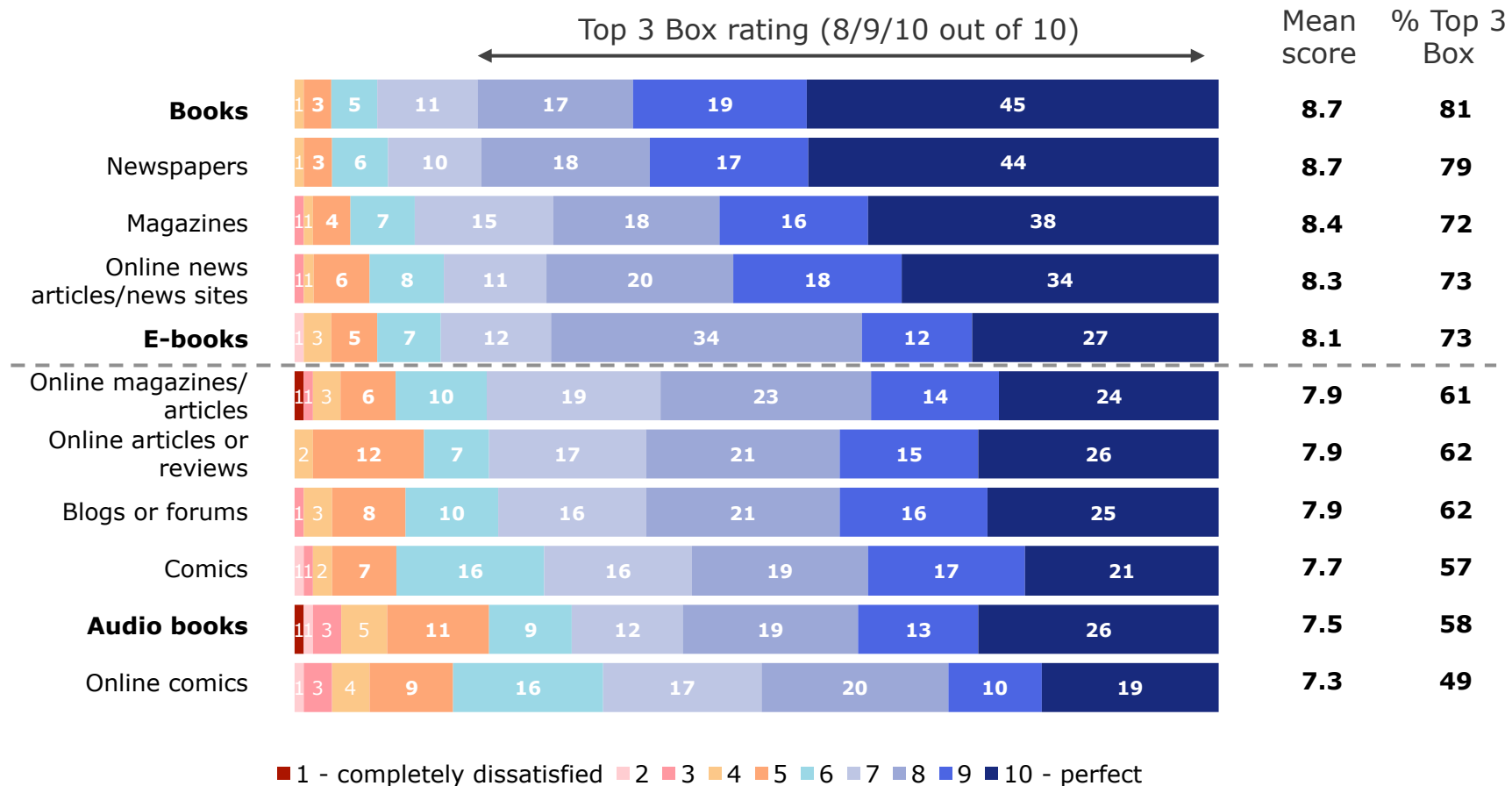
Initiatives to make book reading more desirable should start primarily with current book readers and then secondarily, to convert non-book readers



Along with newspapers, books heads the list of satisfaction with reading materials



Overall rating of reading materials



Base: Have material in consideration set: Books (n=1399), newspapers (n=2381), magazines (n=1896), online news (n=362), e-books (n=191), online magazines (n=286), online articles (n=362), blogs/forums (n=133), comics (n=268), audio books (n=53)

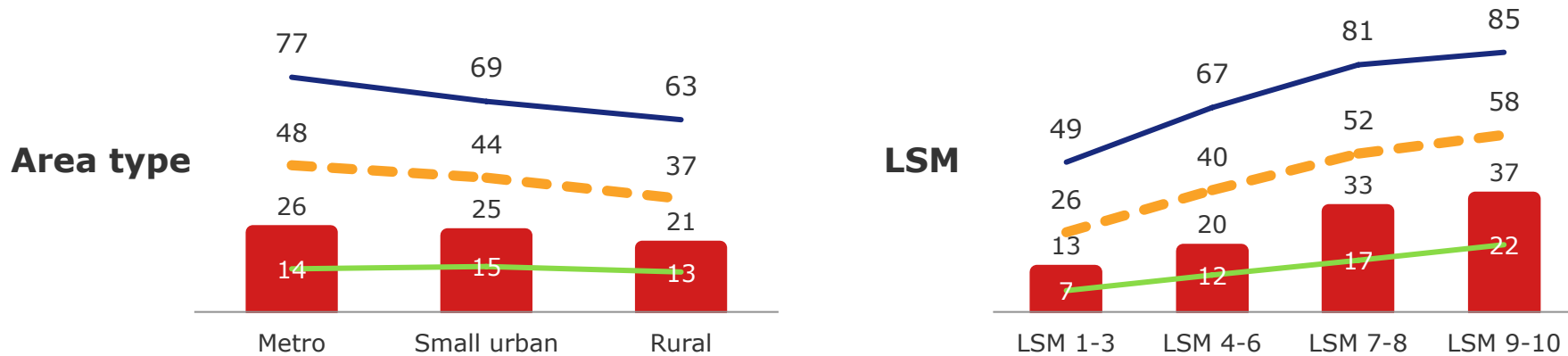


Need to make current book readers the ambassadors/influencers to spread the word

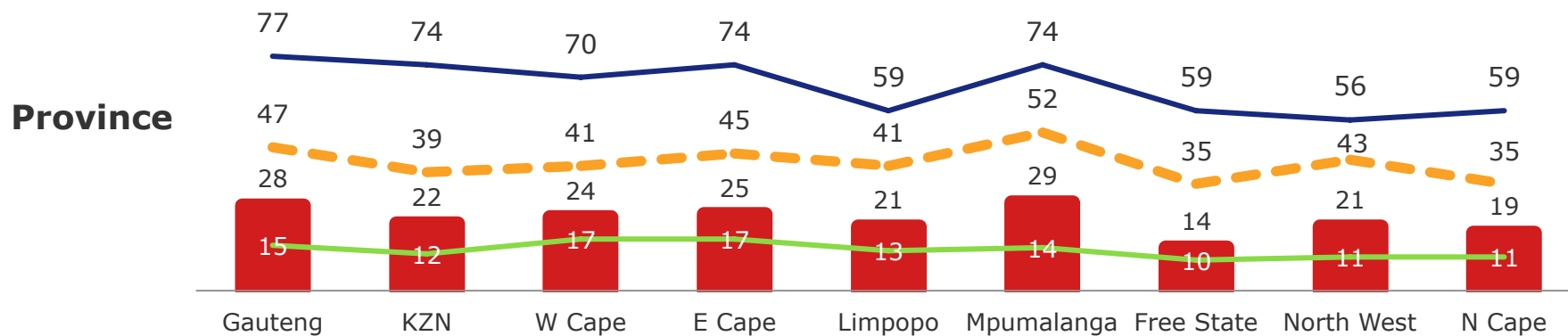


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Summary of behaviour by demographics



- % read (printed) books (24% total)
- - - Read past month (43% total)
- Ever read (70% total)
- Committed readers (14% total)



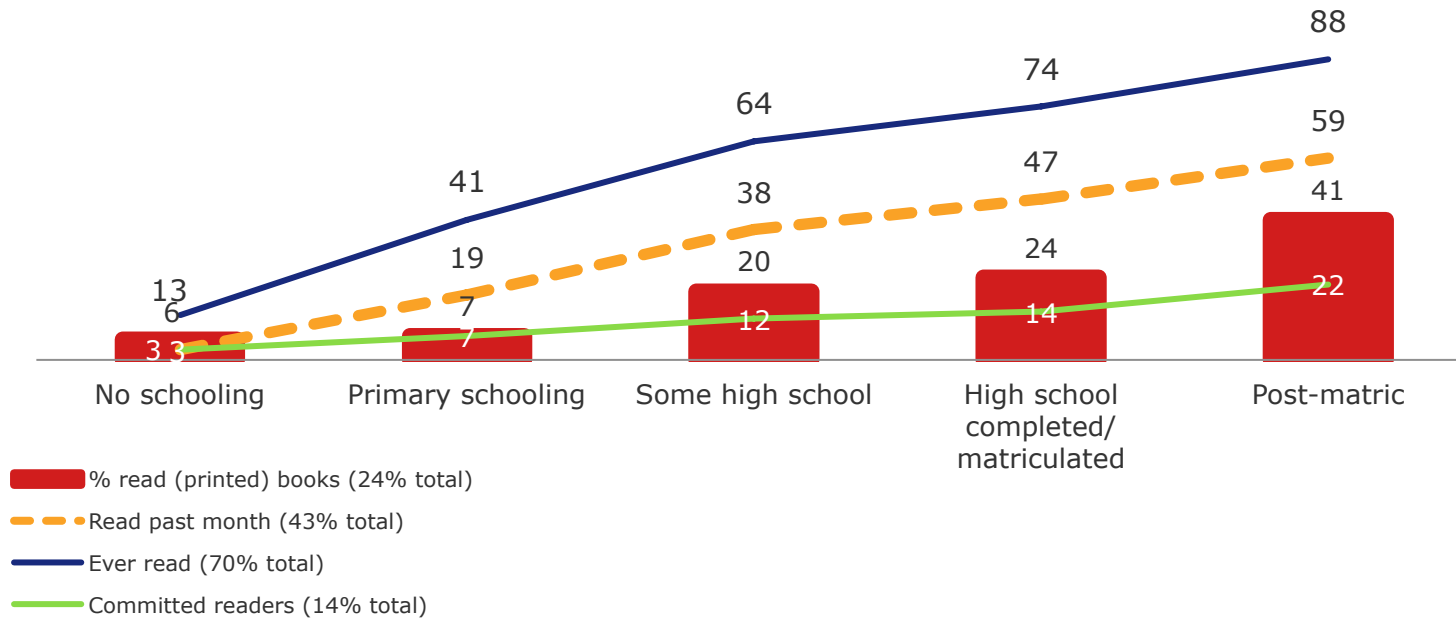
Base: Total sample (n=4000)



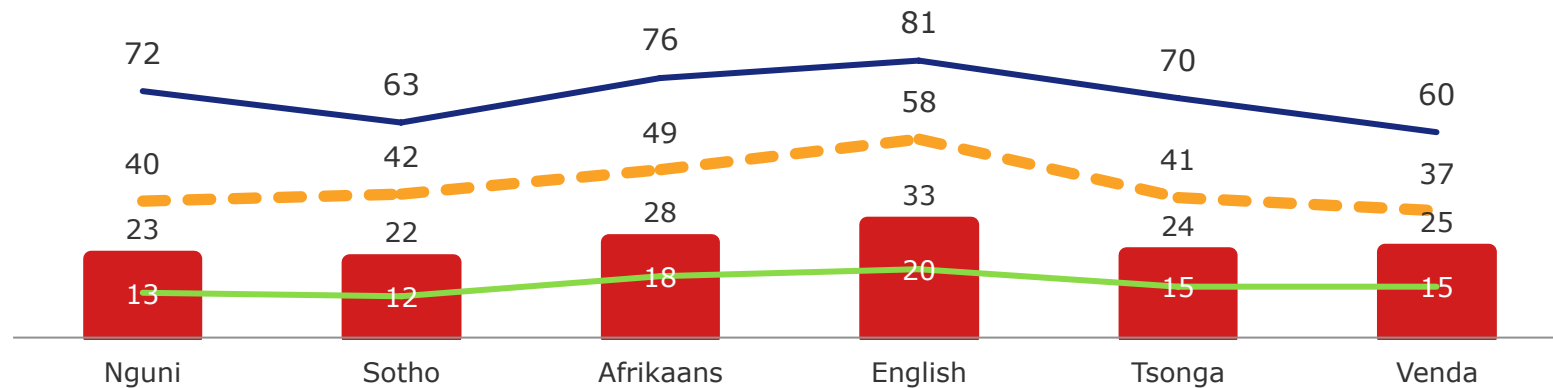
Summary of behaviour by demographics (continued)



Education



Home language



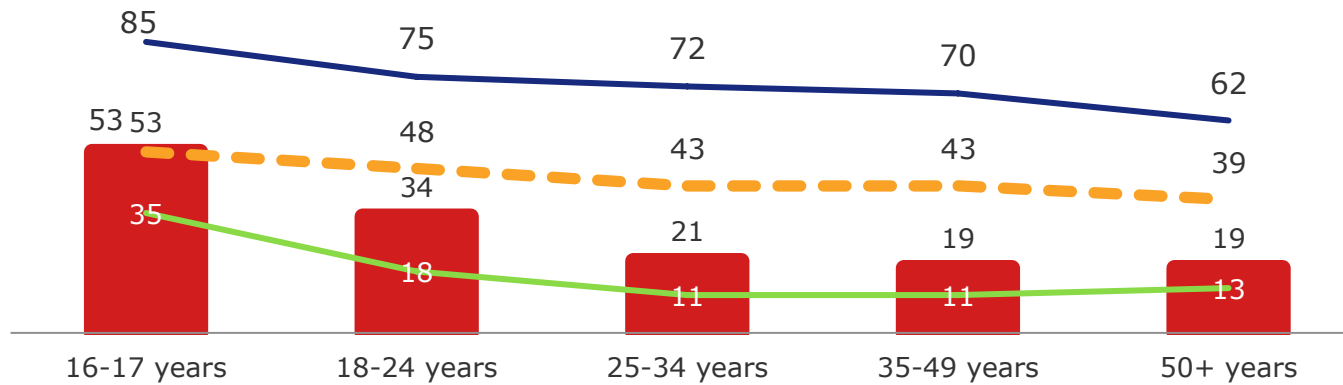
Base: Total sample (n=4000)



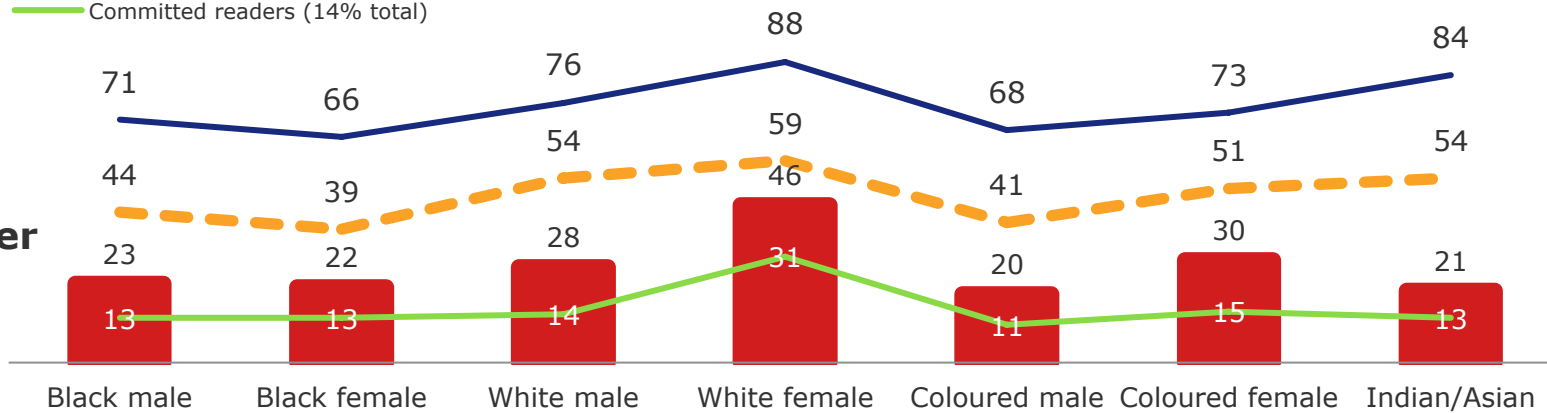
Summary of behaviour by demographics (continued)



Age



Race/Gender



Base: Total sample (n=4000)



Sizing the reading landscape to date ...



	Total SA adults 16+	Population size
Ever read for leisure:	70%	26,856,600
↓		
Read for leisure past month:	43%	16,573,300
↓		
Read any books:	25%	9,454,100
↓		
Read printed books:	24%	9,225,400
↓		
Committed printed book readers:	14%	5,346,500

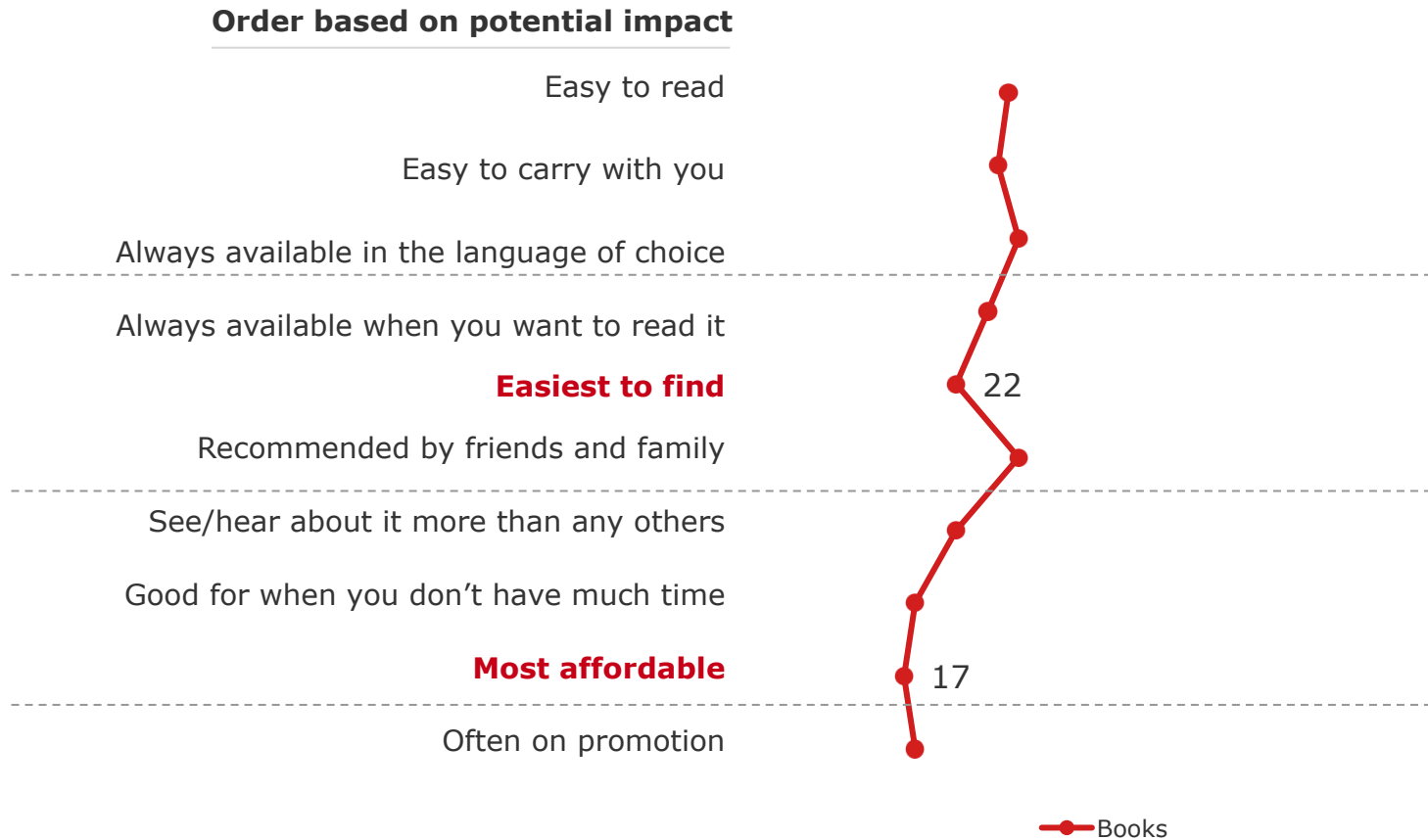


- Actions:**
1. Convert occasional and less frequent readers to read at least monthly
 2. Persuade newspaper readers to add books to their reading repertoire
 3. Build desire for reading books
 4. Create new occasions for current (book) readers to read more

Ease of access and affordability are printed books' biggest barriers vs. other reading materials



Association on market factors



Base: Leisure readers (n=2887)

Ranked on market share flows

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Ease of access is a more important factor than cost



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Books' biggest relative market power strengths are in recommendations & language availability – areas to leverage further



Association on market factors



Base: Leisure readers (n=2887)

Ranked on market share flows

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Need to promote more through word of mouth (through ambassadors) and have conversations at the grass roots level

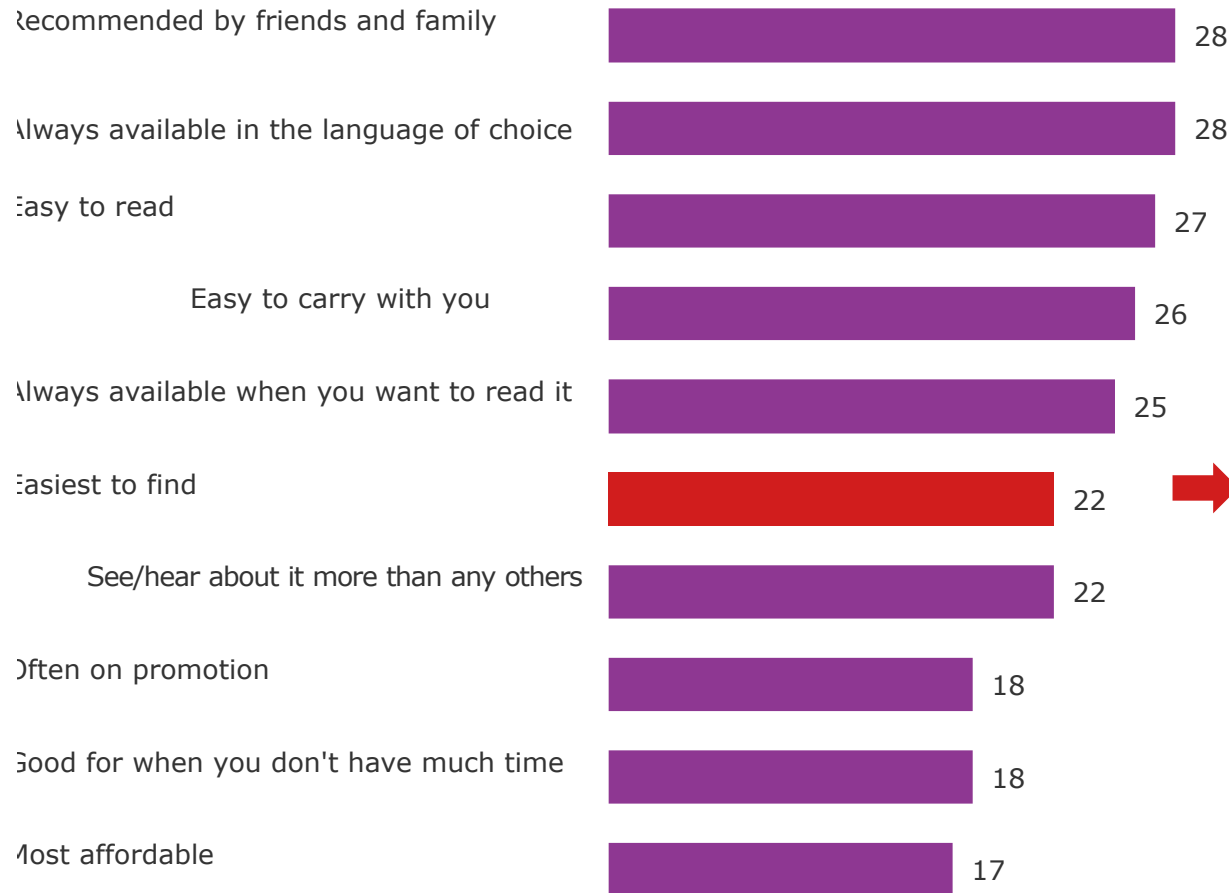


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Books' association on market factors: ease of access



Association with books on market factors



Easiest to find (22%) – highest mentions

- Visit library 36%
- White female 39%
- LSM 9-10 30%
- LSM 7-8 27%
- 16-17 yrs 48%
- 18-24 yrs 31%
- Post matric 29%

Easiest to find (22%) – lowest mentions

- KZN 18%
- Indian/Asian 16%
- 35-49 yrs 16%



Base: Leisure readers (n=2887)

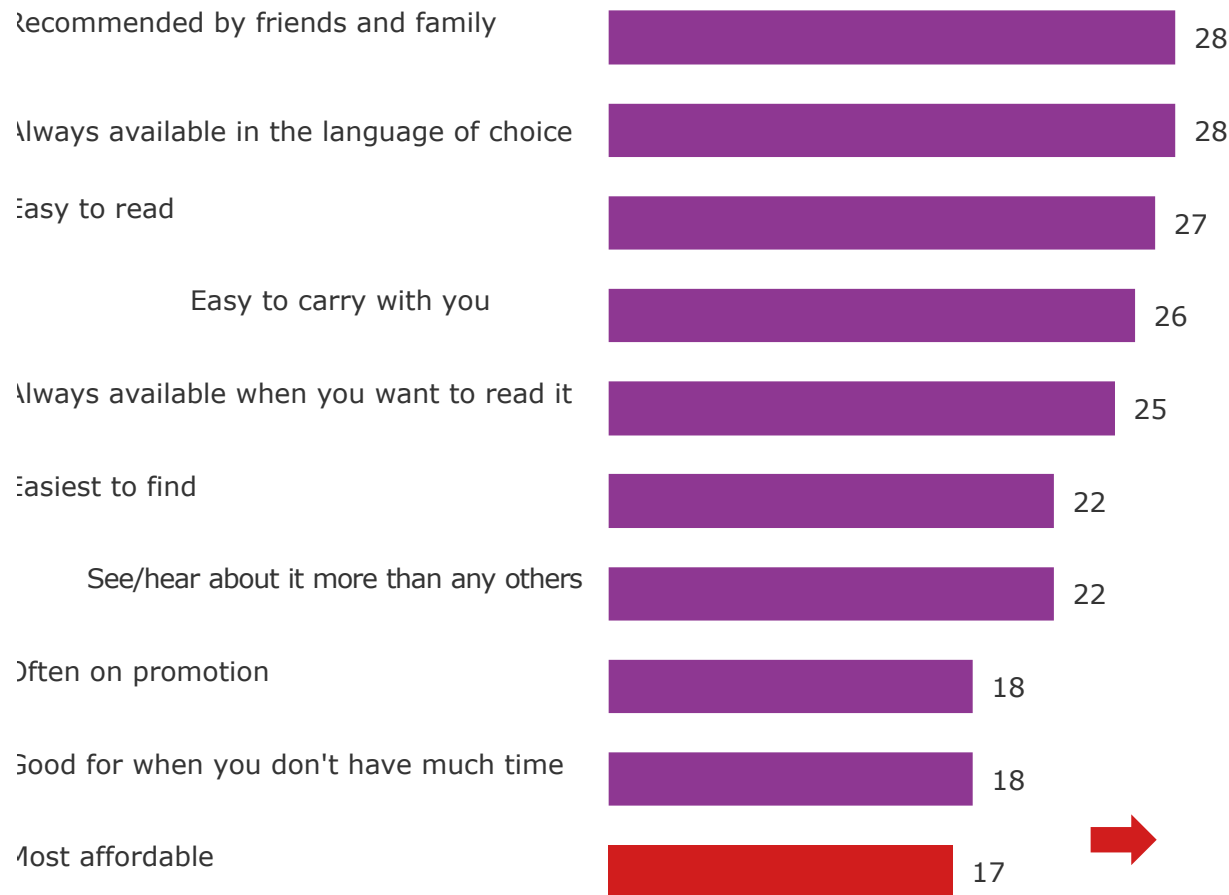
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Books' association on market factors: affordability



Association with books on market factors



Most affordable (17%) – highest mentions

- Visit library 28%
- White female 29%
- LSM 9-10 22%
- 16-17 yrs 35%
- 18-24 yrs 22%
- Post matric 24%

Most affordable (17%) – lowest mentions

- KZN 12%
- Coloured male 11%
- Indian/Asian 11%
- 35-49 yrs 12%



Base: Leisure readers (n=2887)

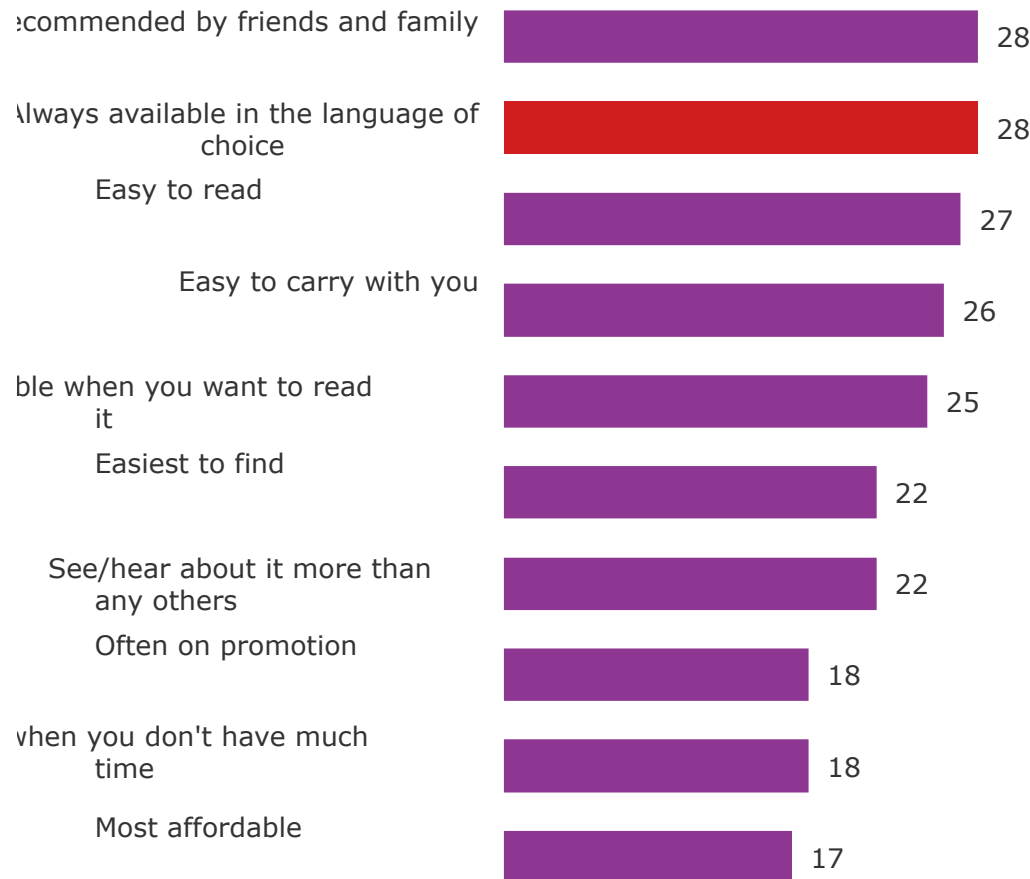
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Books' association on market factors: language availability – slightly lower association amongst Nguni speakers



Association with books on market factors



By home language

	Nguni	Sotho	Afrikaans	English	Tsonga	Venda
Base:	(1293)	(709)	(375)	(366)	(90)	(52)
	%	%	%	%	%	%
	25	30	31	29	33	34



Base: Leisure readers (n=2887)

© TNS



Numbers probably low because of the limited availability of indigenous language content



Barriers to reading books extend to not having sufficient time as well as access to a library close by



Read any books	
Yes	No
(n=1009)	(n=2991)
%	%

Perceptions about books (Negative statements 5%+)



24	21
5	25
8	8
3	7



Base: Total sample (n=4000)
Agreement with statements over 5% shown

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Time is a bigger barrier than cost – how to create content that overcomes this?



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Very low levels of agreement across all statements relating to barriers to reading



Perceptions about books (All statements)

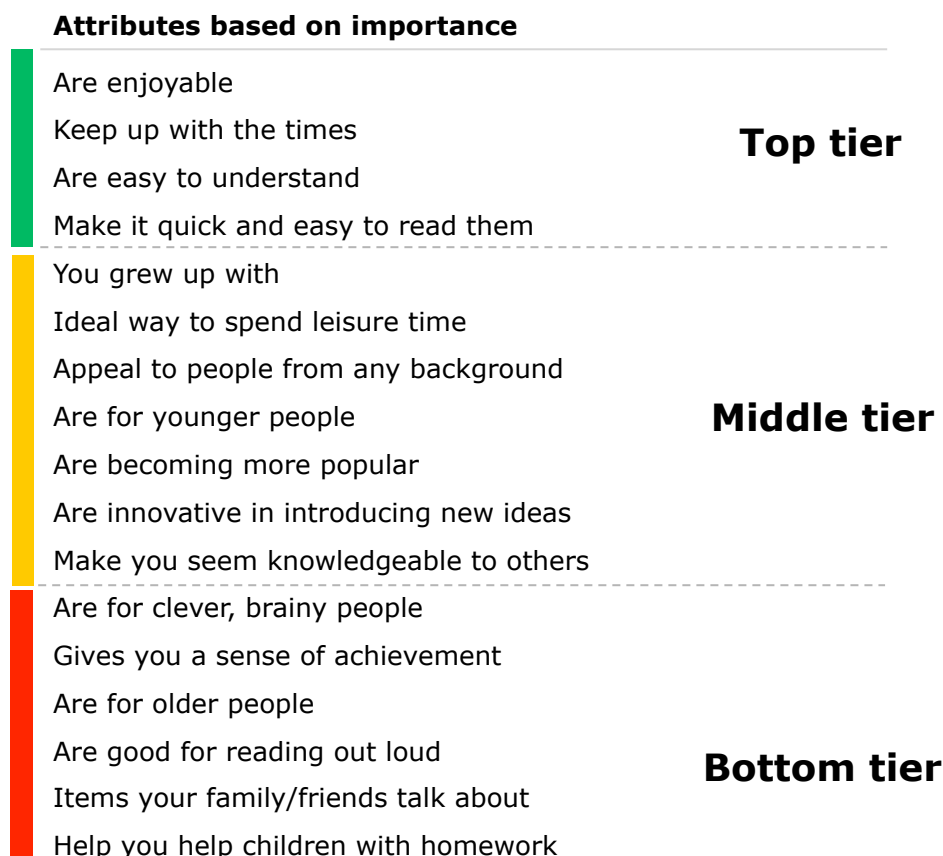
Base:	Total (4000)	Read any books	
		Yes (1009)	No (2991)
Agree with at least one statement	55	50	57
• There is no library near where you live	22	24	21
• You don't have time to read books	20	5	25
• Books are so expensive that you can not afford to buy them	8	8	8
• You find reading books difficult so you would rather do something else	6	3	7
• People who read think they are better than other people	4	5	3
• You would rather go online or browse social media than read a book	3	4	3
• You would read more books if they were like a TV series where you could read the chapters at different times, not all at once	3	3	3
• You find books are expensive so you'd rather spend your money elsewhere	3	2	3
• The opening times of the library are not convenient	3	4	3
• The library nearest to you does not have any books in your language	2	3	1
• You would like to borrow books from the library but you don't know how to go about it	2	3	1
• The library nearest to you does not have any new or interesting books	2	4	2
• The book shop nearest to you does not have any interesting books	2	3	1
• E-books are much cheaper than printed books	2	5	1
• You don't know how to look for books of your interest in the library or mobile library	2	2	2
• You don't know how to look for books of your interest in the book shop	1	2	1
• You visit the library with your children	1	2	1

Base: Total sample (n=4000)





Being enjoyable, keeping up with times, being easy to understand and being quick and easy to read are the most important attributes driving engagement with reading materials



Base: Leisure readers (n=2887)

© TNS



The top tier of importance all relate to creating relevant content that is easy to read

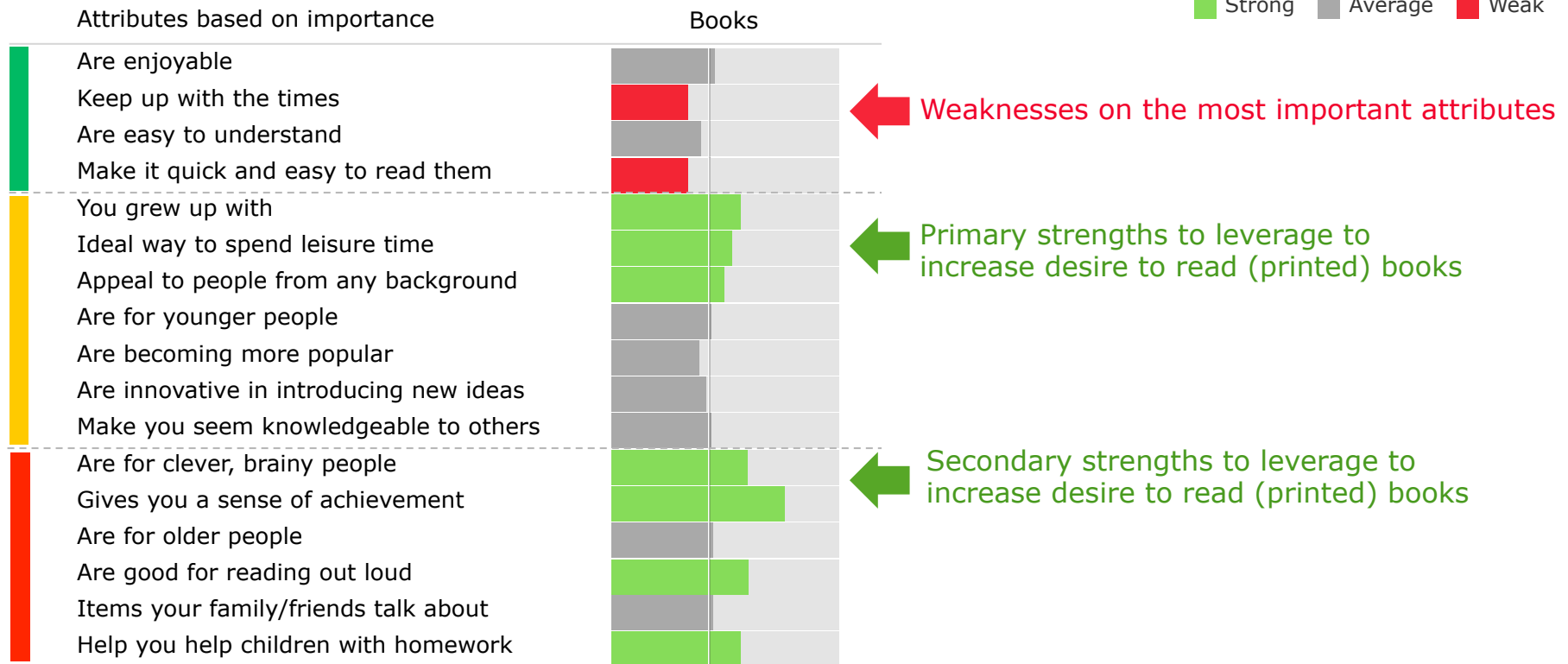


Books' biggest relative weaknesses are in not keeping up with the times and not being quick and easy to read



Relative performance vs. other reading materials

Strong Average Weak



SAMPLE SIZE: n. 2887 [2818 weighted] // Benchmark for Performance: Power in the Mind

Base: Leisure readers (n=2887)



© TNS



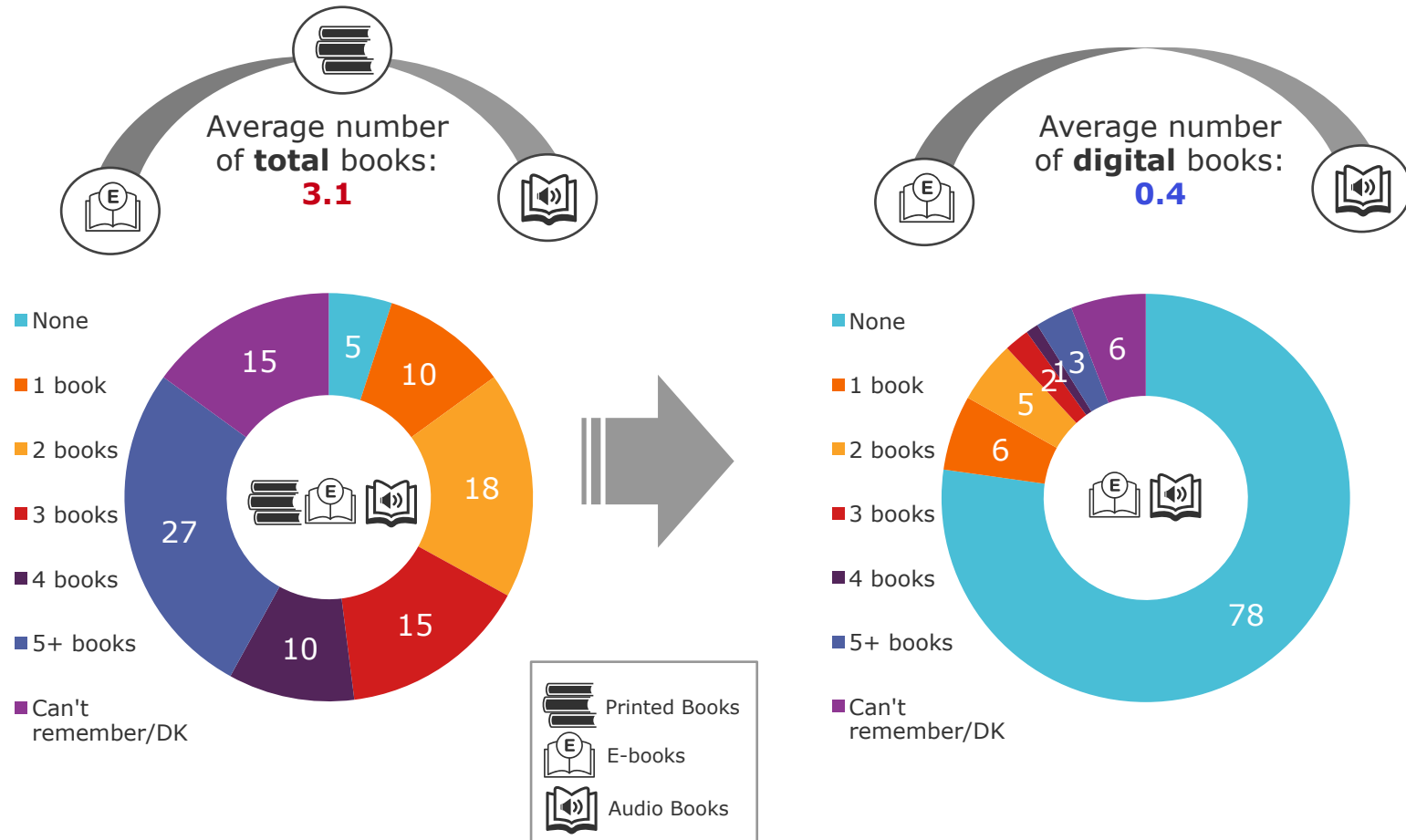
'Time' again appears as a key barrier to be overcome



On average, book readers claim to have read 3.1 books (any) in the past 6 months, and 0.4 digital books on average



Number of books read in the past 6 months



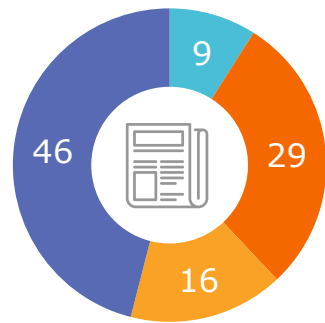
Base: Book readers (n=1009)



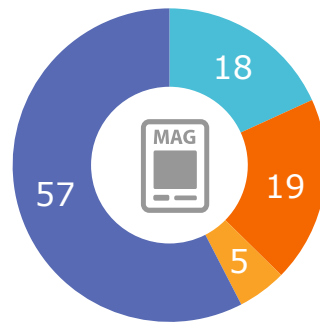


(Printed) books are read in a similar nature to newspapers; just under one in five (19%) book readers claim 'everyday' book reading – down from 28% in 2006

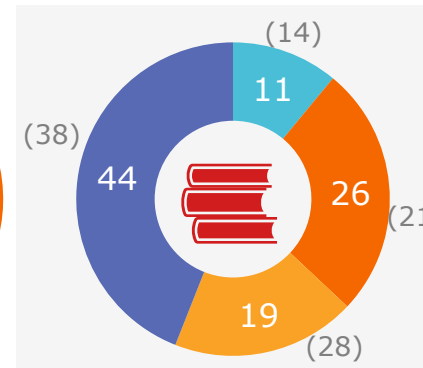
Printed reading materials:



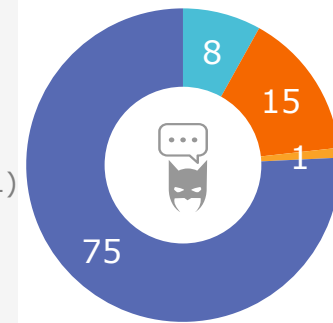
Newspapers



Magazines

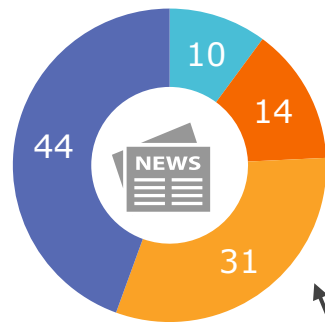


Books

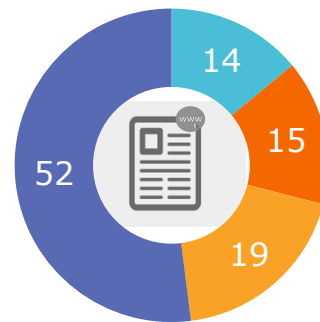


Comics

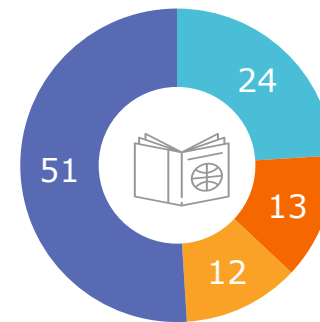
Digital reading materials:



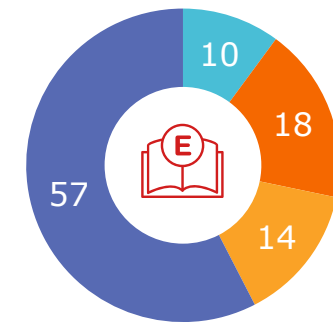
Online news articles/
new sites



Online articles/
reviews



Online magazine/
magazine articles



E-books

- On weekends mainly
- On weekdays mainly
- Everyday
- No set time

Highest 'everyday' proportion

(2006)



Base: Have material in consideration set: Newspapers (n=2111), magazines (n=1422), books (n=983), comics (n=71), online news (n=205), online articles (n=102), online magazines (n=83), e-books (n=56).



Proliferation of formats since 2006 (including digital) means that books have more to compete against in 2016

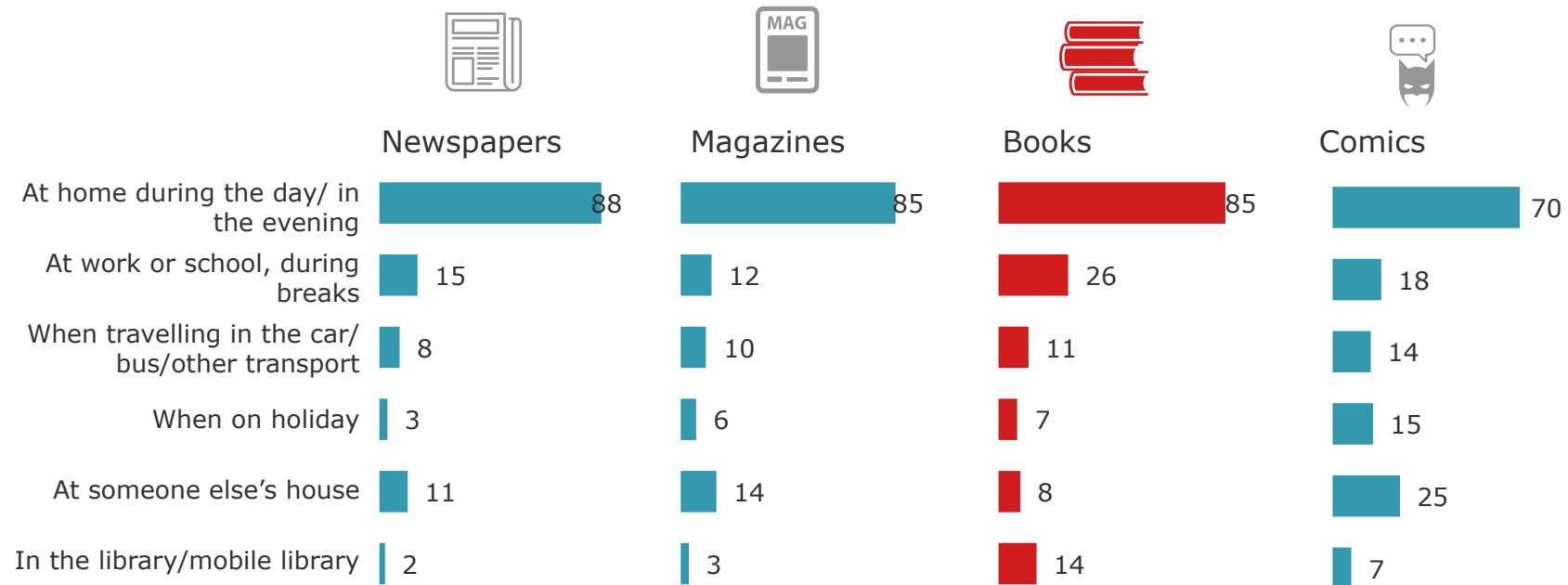


SOUTH AFRICAN
BOOK DEVELOPMENT
COUNCIL

Most reading of print material is done at home; one-quarter of book readers are reading books at work or school in breaks which is the highest number for any print material; similarly high number for reading books in the library (14%)



Where read printed material



Base: Have material in consideration set: Newspapers (n=2111), magazines (n=1422), books (n=983), comics (n=71)

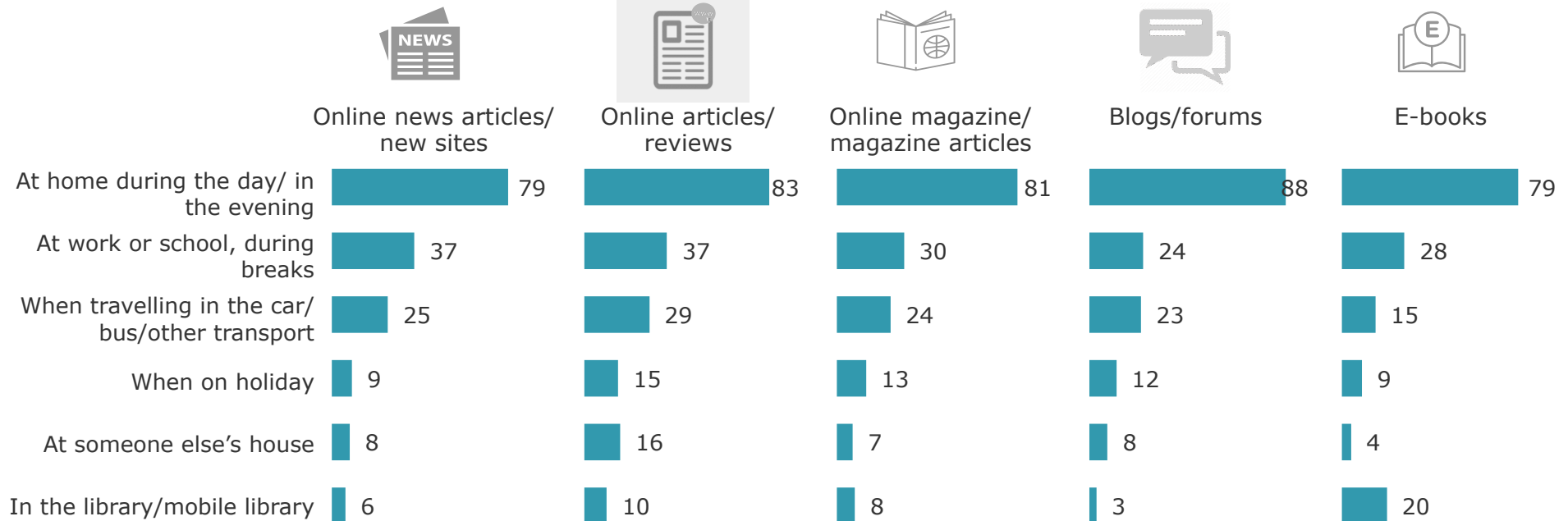
© TNS



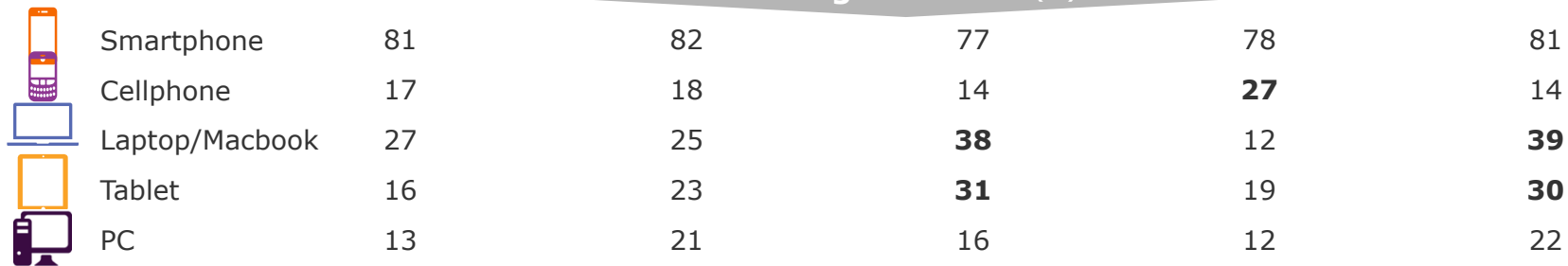
Much higher reading of digital material outside of the home – on mobile phones largely



Where read digital material



Device ownership amongst readers (%)



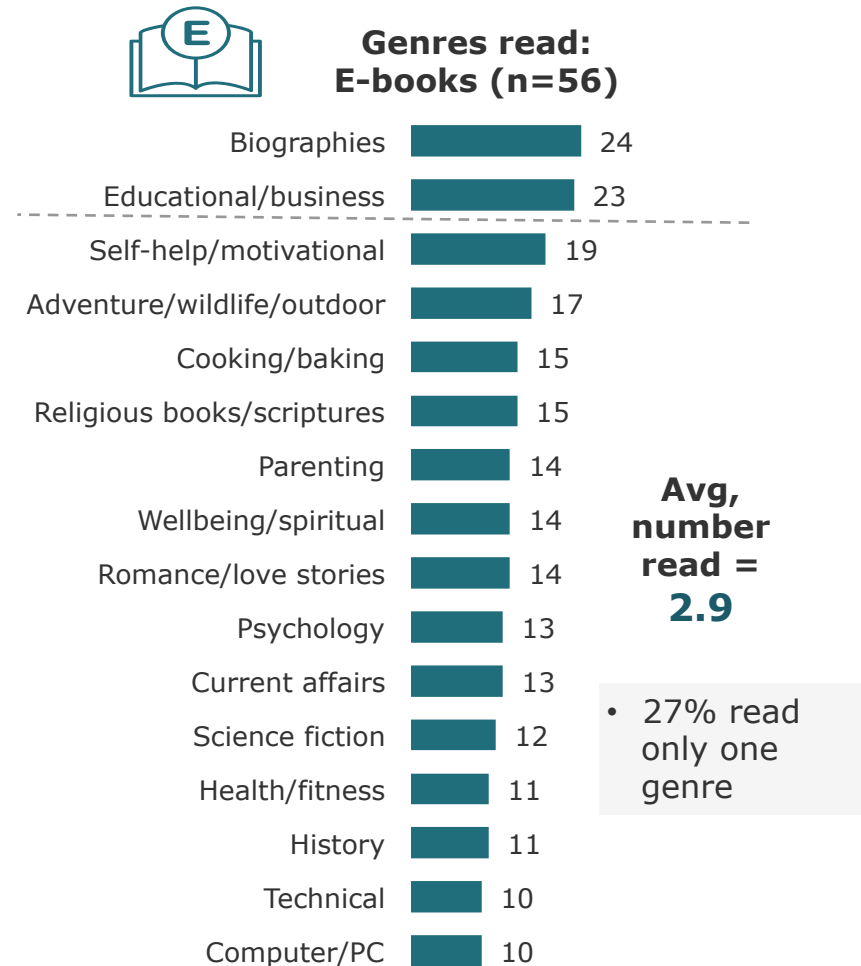
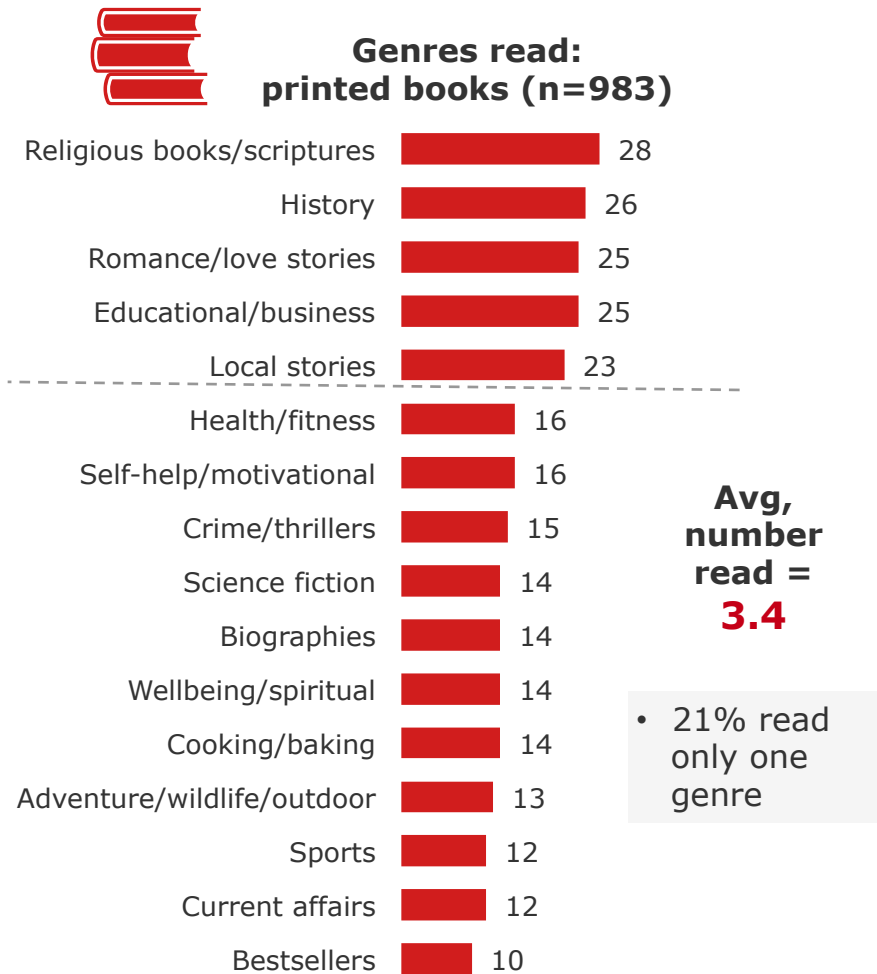
Base: Have material in consideration set: Online news (n=205), online articles (n=102), online magazines (n=83), blogs (n=61), e-books (n=56)

Read: 81% of those reading online news have a smartphone



New occasions can include creating content for mobile reading

A diverse range of genres is being read; religious books, history, romance, educational/business and local stories top printed books' list whilst biographies and educational/business top e-books' list

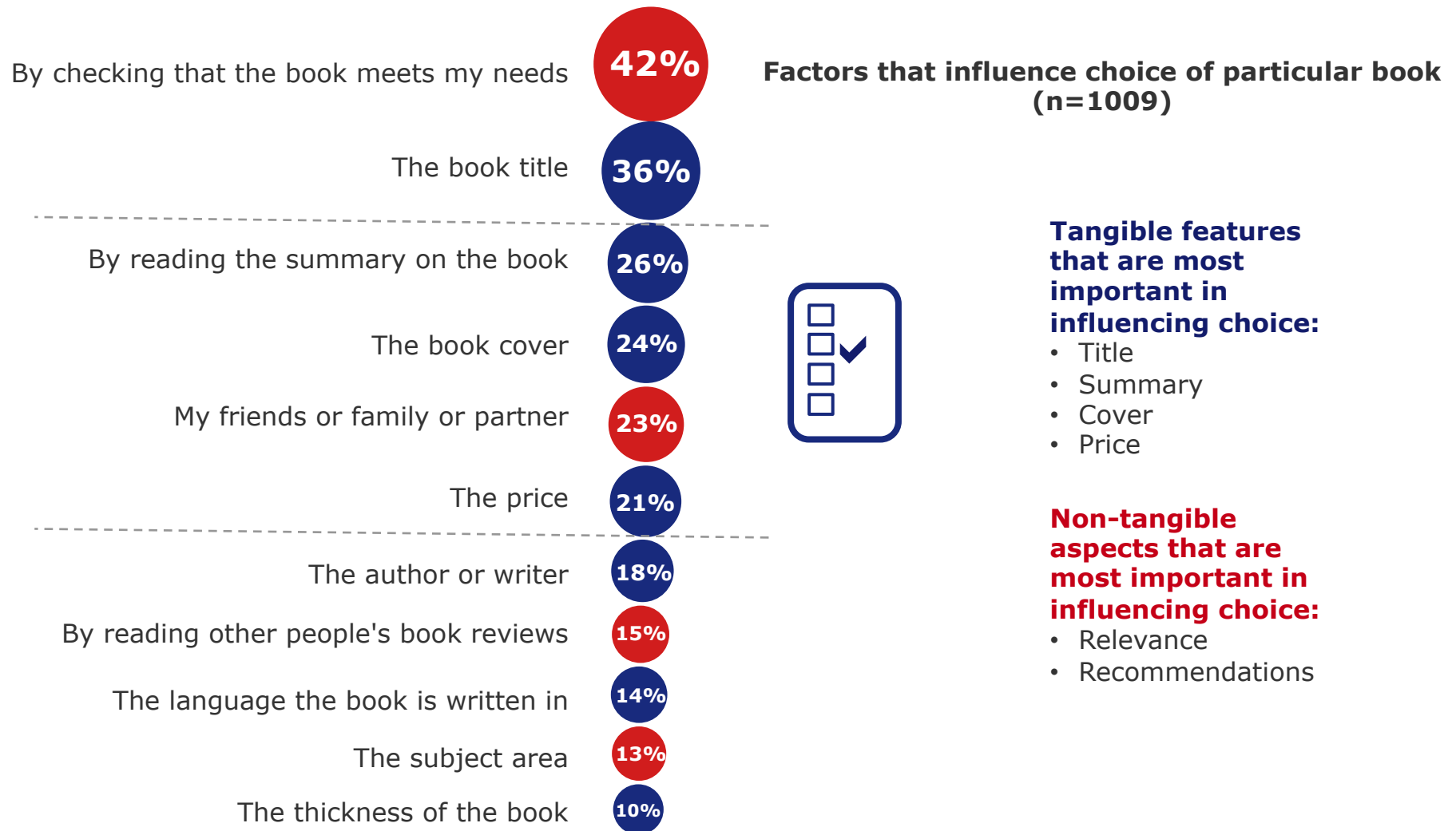


Base: Readers of printed books (n=983) and readers of e-books (n=56). Base size for audio books is too small to display
Mentions over 10% shown





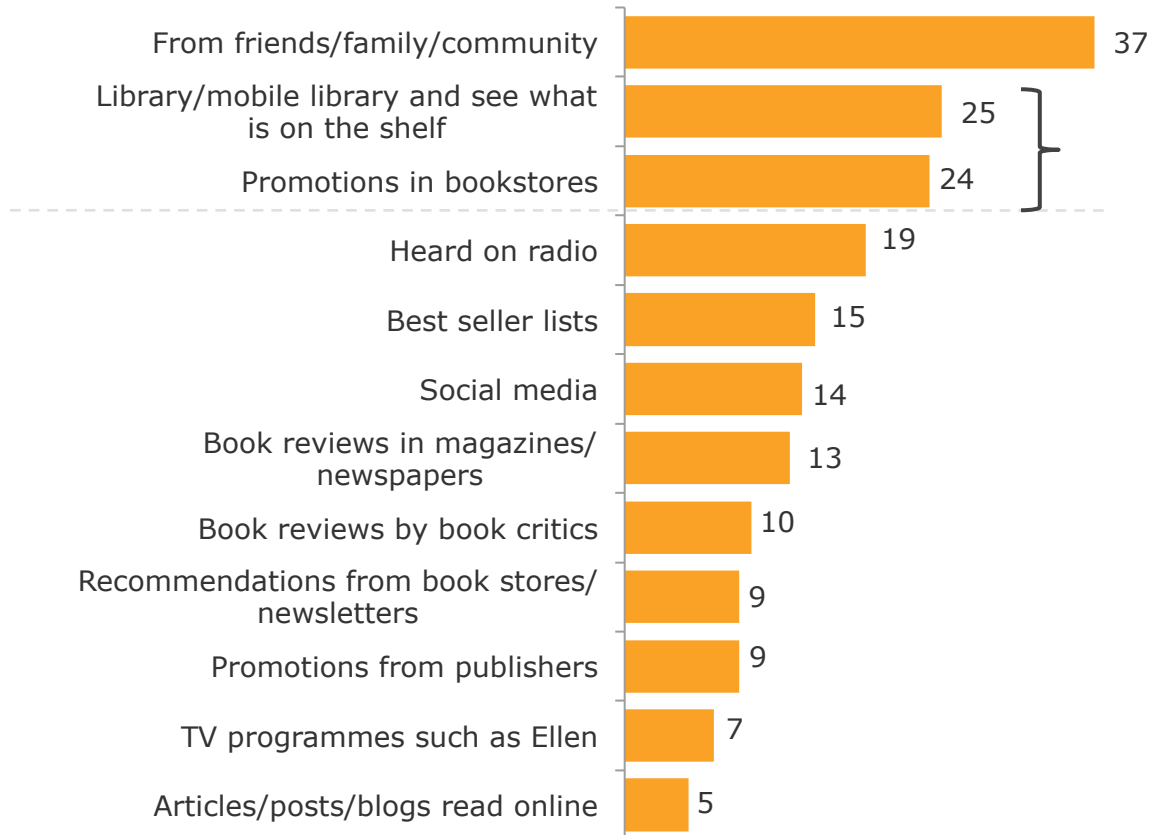
After overall relevance, the book's title is the most important physical feature driving choice of book



Most people rely on word of mouth to find out which books to read



**How usually find out which books to read
(n=1009)**



• One-quarter of book readers claim that libraries and bookstores aid them in decision-making



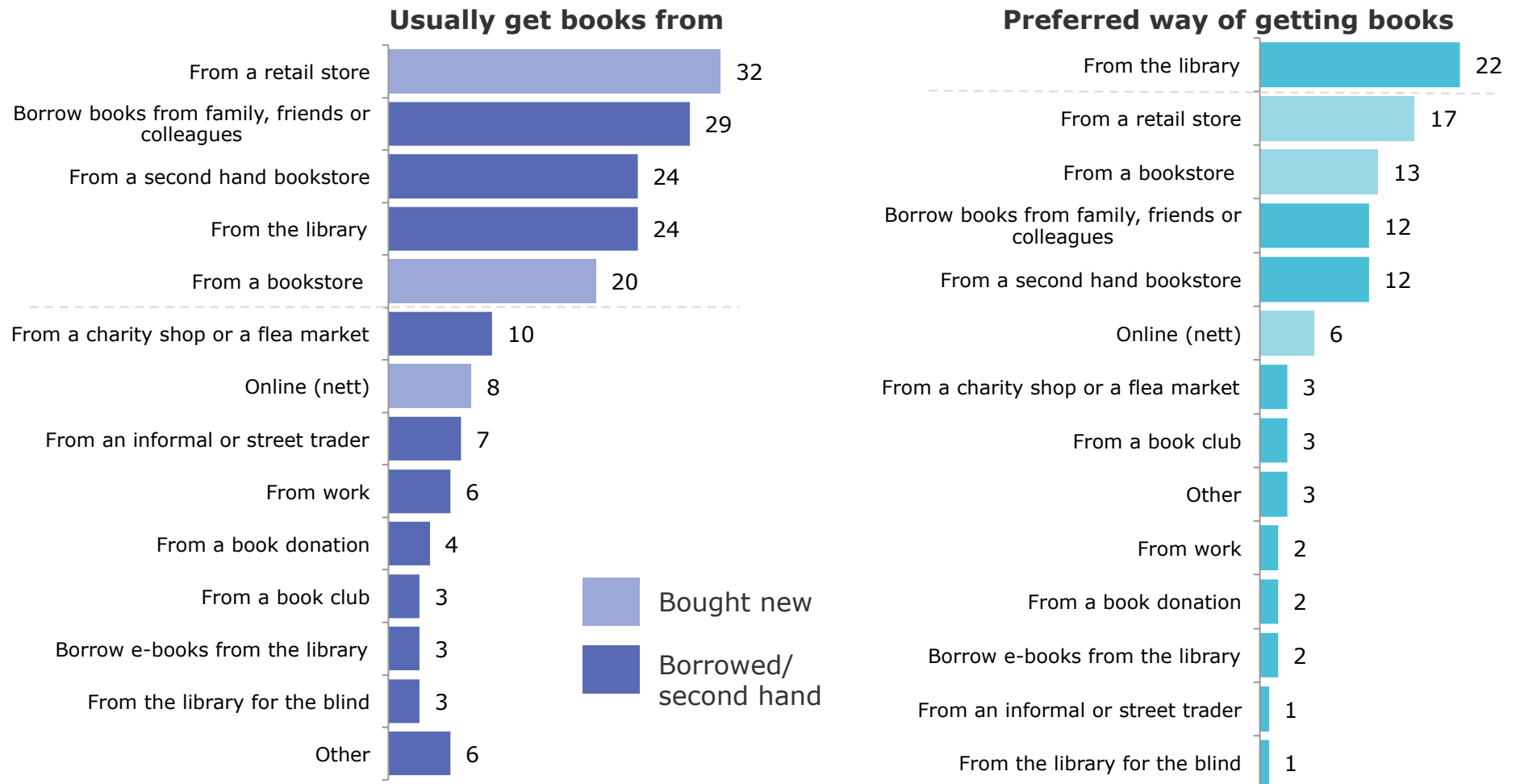
Base: Readers of any books (n=1009)
Mentions over 5% shown

© TNS





While most people get their books from a retail (book) store or borrow them, the library tops the list of where they'd *prefer* to get books from

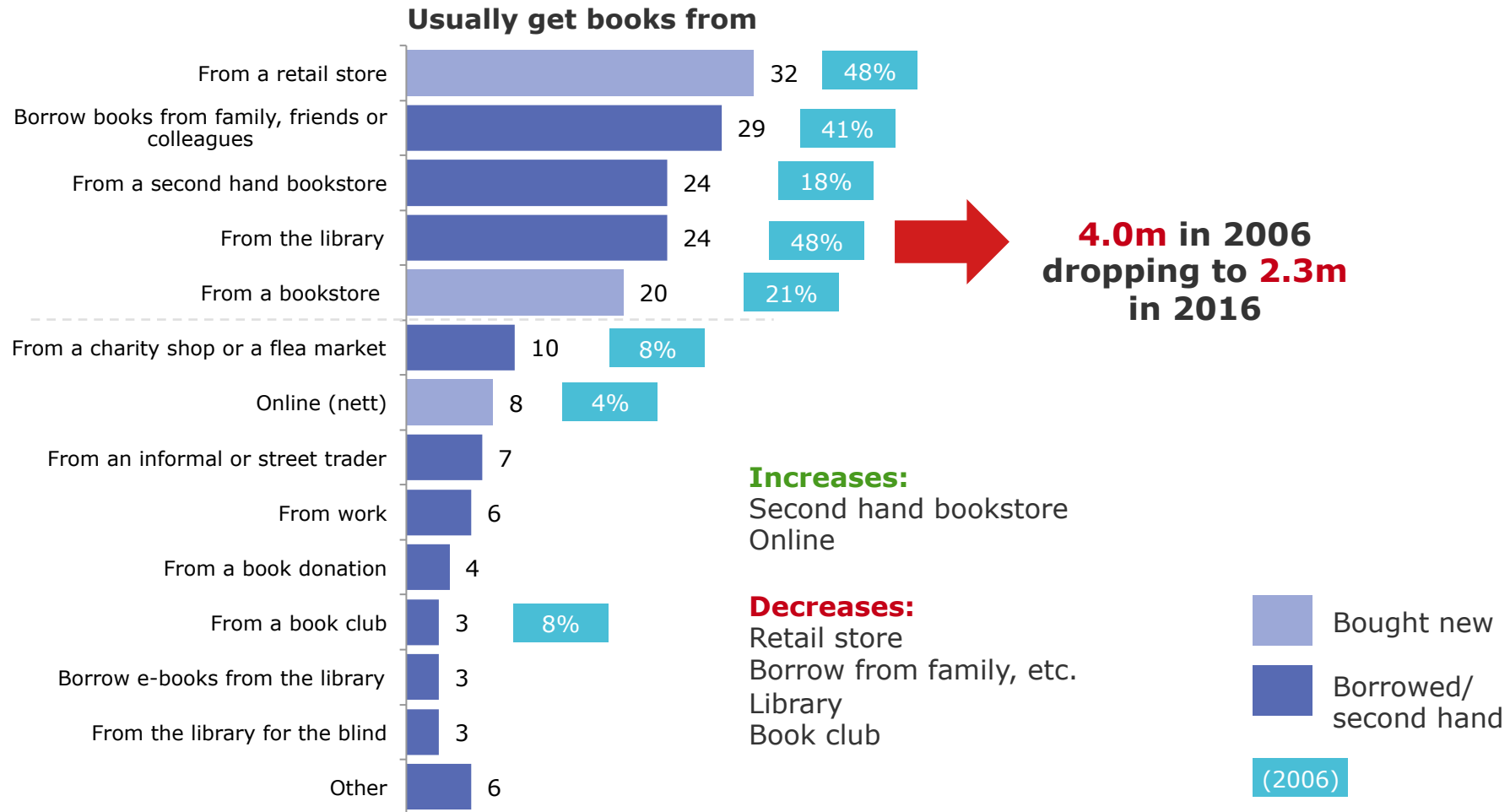


Base: Readers of any books (n=1009)

© TNS



Channels of sourcing books have changed dramatically since 2006 – with libraries dropping from 48% to 24% of book readers



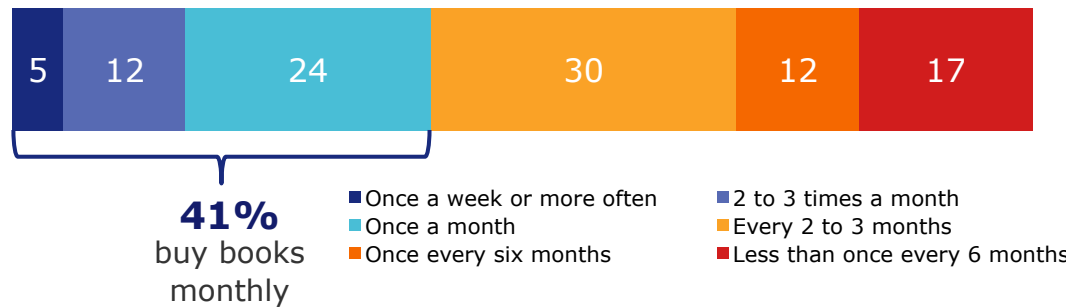
Base: Readers of any books (n=1009)
 Read: in 2006, 48% of book readers claimed to get books from a library – dropping to 24% in 2016



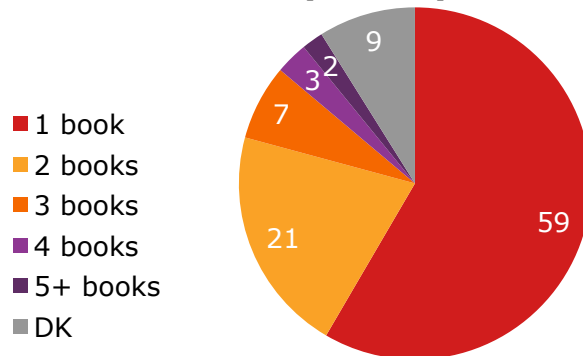
Over four in ten retail buyers buy books monthly; most of these people buy one book per purchase spending an average of R171



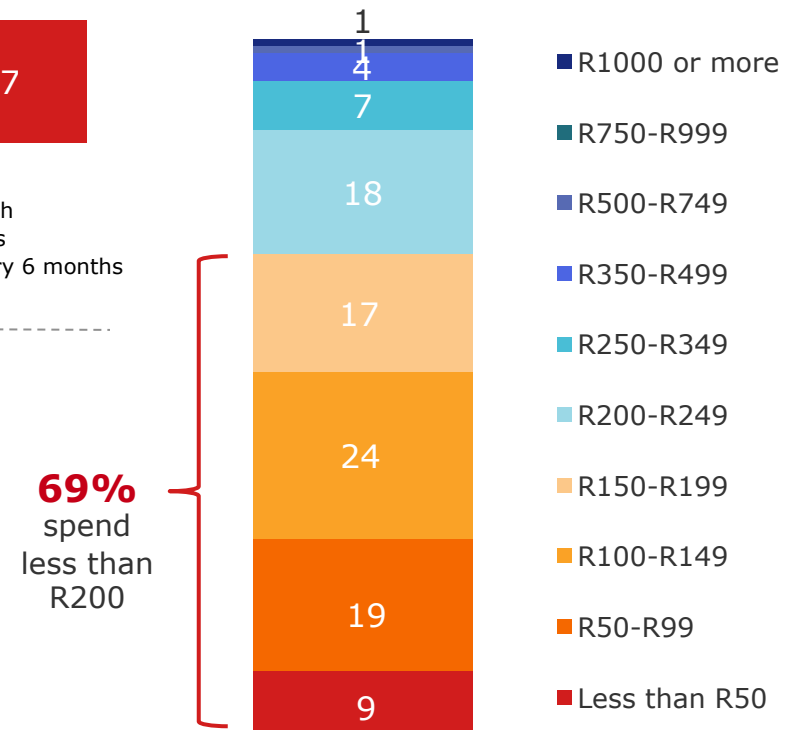
Frequency of buying books from a bookstore or retail store (n=440)



Number of books bought at a time (n=440)



Amount spent at bookstore or retail store in an average month (n=440)



Average spend: **R171**



Base: Buy books from a bookstore or retail store (n=440)

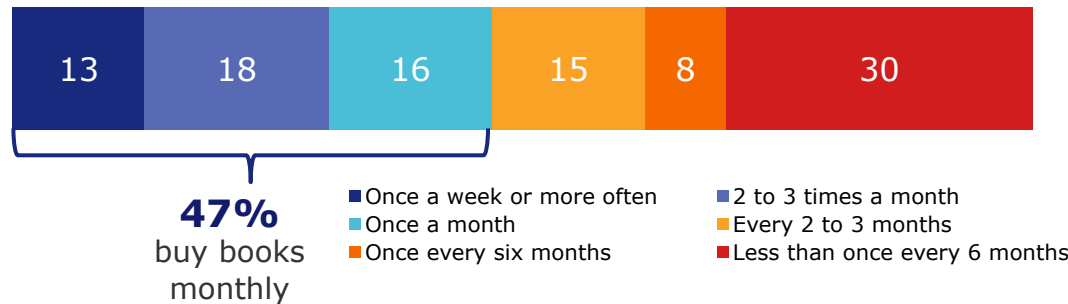
© TNS



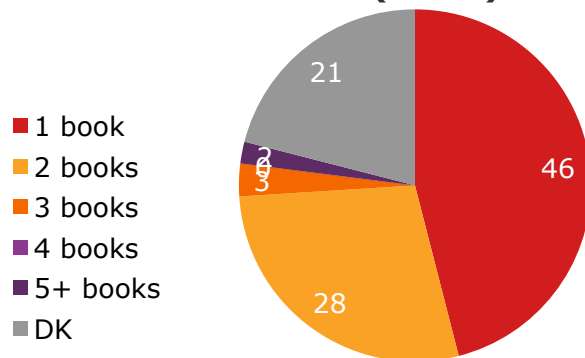
Almost one-half of online buyers buy books monthly; fewer of these people buy one book per purchase with one-fifth not remembering how many; average spend is slightly higher at R187, driven by higher spend in R250-R349 range



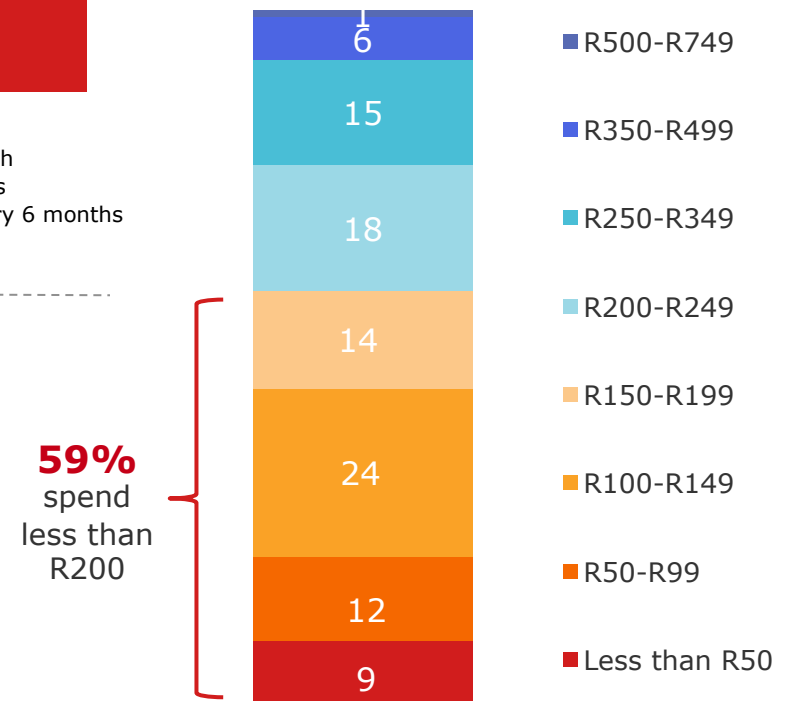
Frequency of buying books online (n=62)



Number of books bought at a time online (n=62)



Amount spent online in an average month (n=62)

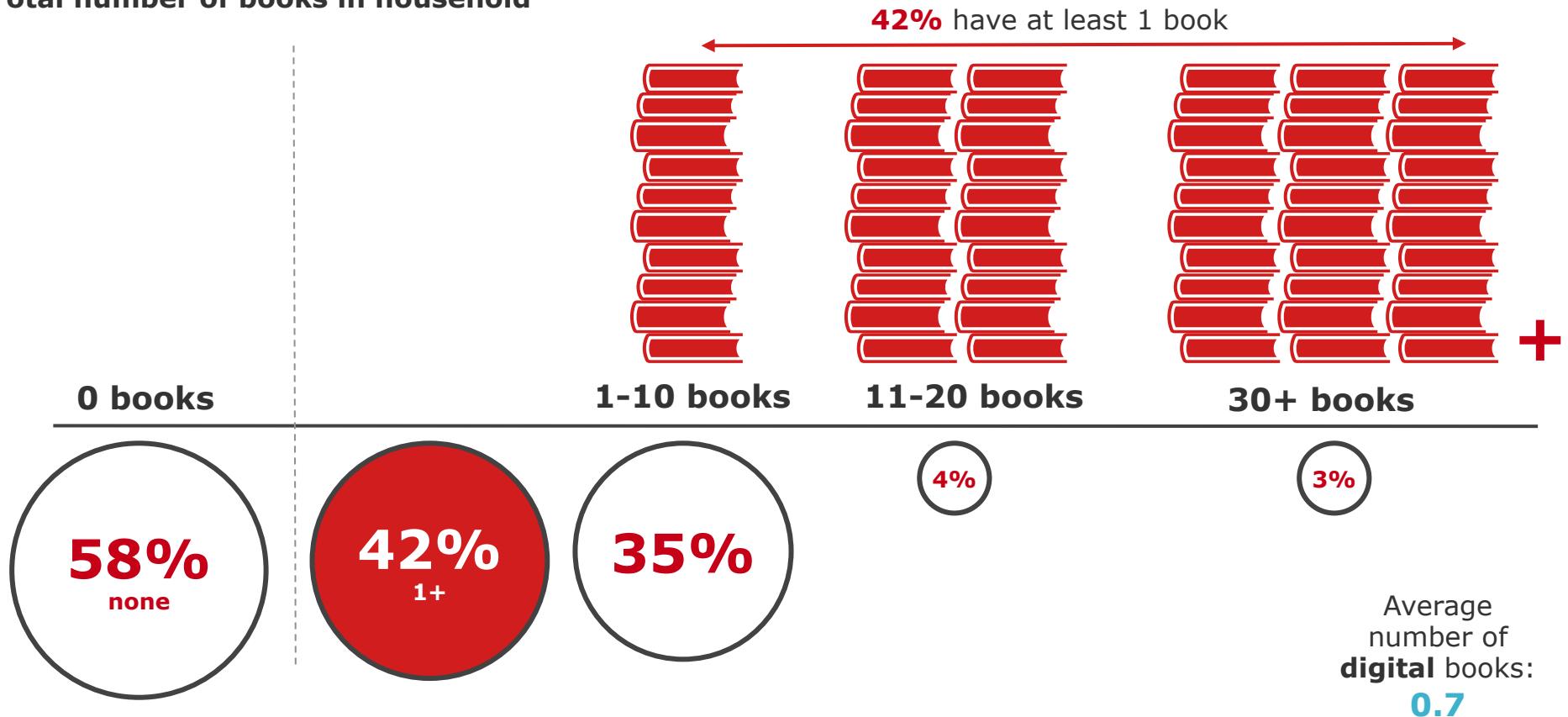


Average spend: **R187**

Almost 6 in 10 SA adults 16 yrs+ are living in households where there is not one book present



Total number of books in household



Base: Total sample (n=4000)

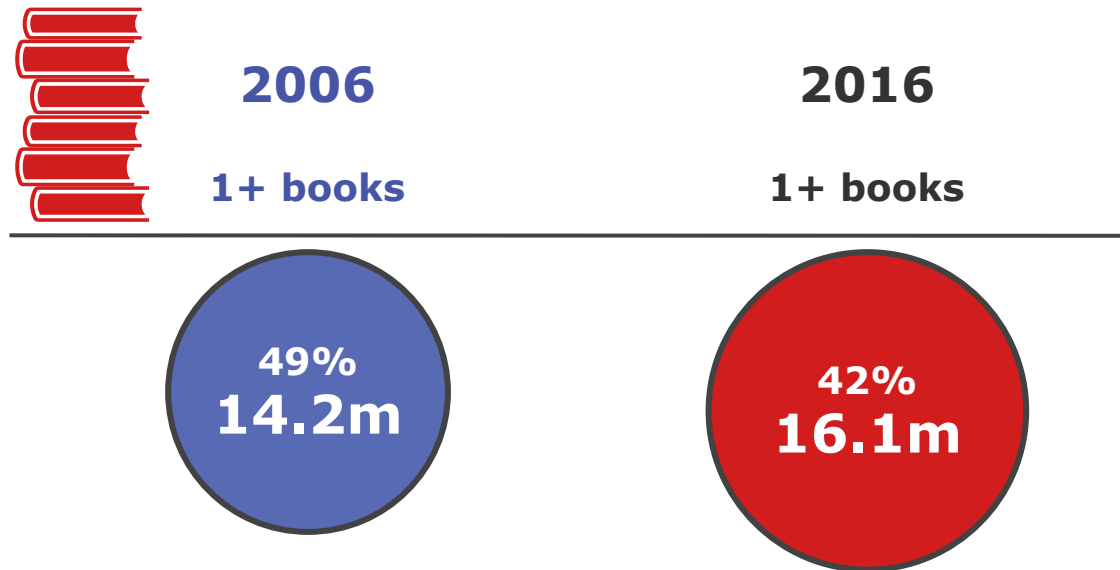


*Total books excluded school, work, magazines, comics, newspapers and religious books



But the good news is that this translates into higher numbers overall because of the population increase...

... it means that **16.1m** adults live in homes with at least one book in 2016 – up from **14.2m** in 2006



“The results of this study indicate that **getting some books into their homes is an inexpensive way** that we can help children succeed”

Mariah Evans, UCLA



Base: Total sample (n=4000)

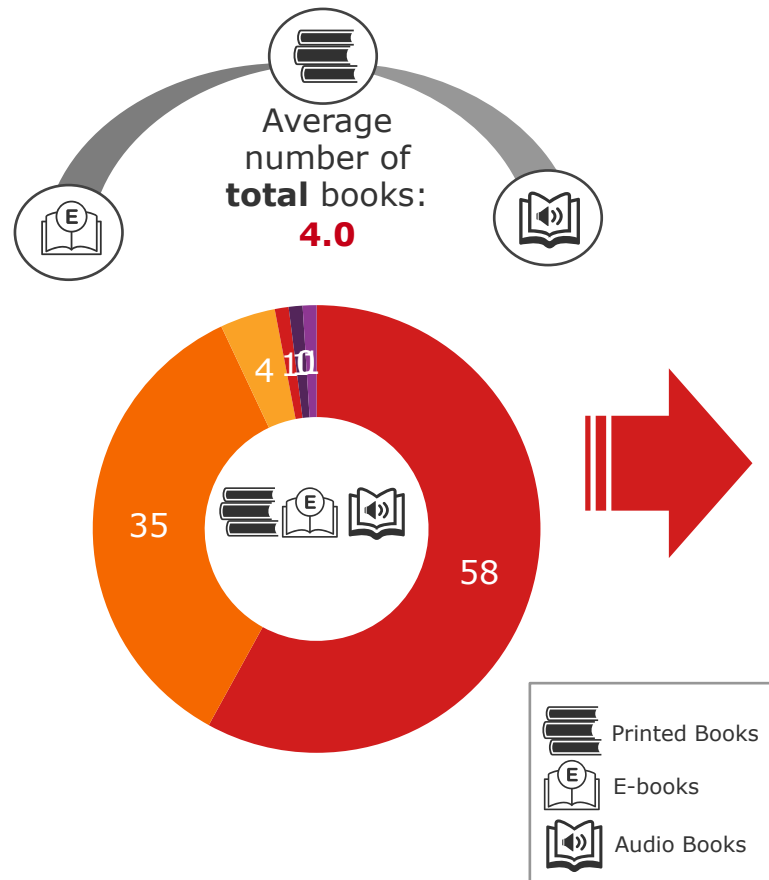
© TNS



Households at the lower end of the SEC scale, with little schooling, are less likely to have any books in their home



Total number of books in household



No books in household (58%)

- Rural 69%
- Limpopo 72%
- North West 68%
- N. Cape 68%
- Coloured male 66%
- LSM 1-3 82%
- LSM 4-6 64%
- No schooling* 99%
- Primary schooling 77%
- Tsonga 67%



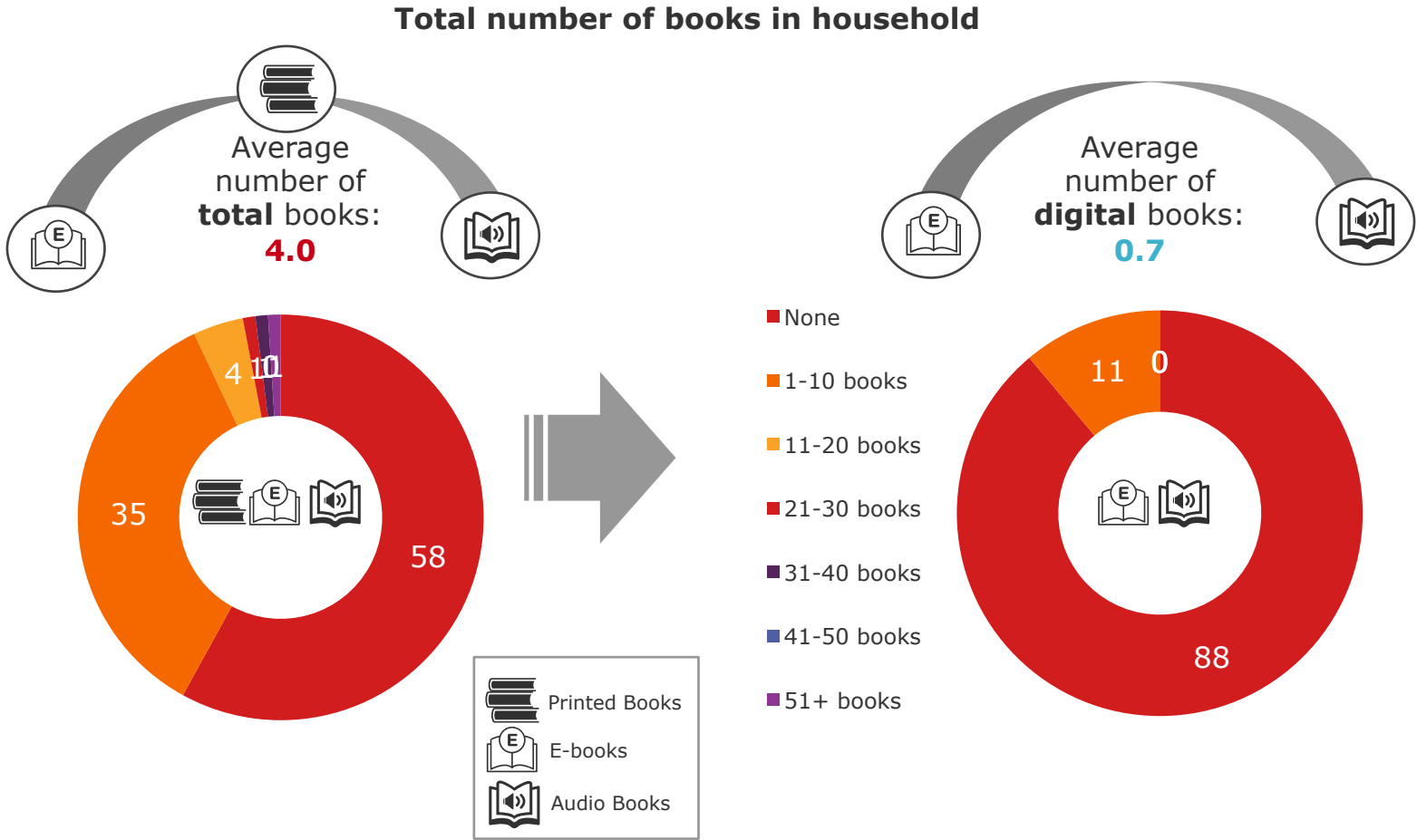
Base: Total sample (n=4000)
* Caution: small base size

© TNS





Very few households have any digital books in them



Base: Total sample (n=4000)



© TNS



A little over 1 in 4 adults (27%) do at least one activity at a library; the main activities conducted there are mostly related to reading, listening to music, doing homework and using wifi



Library activities



=10.2m

Number of activities participated in when visit the library



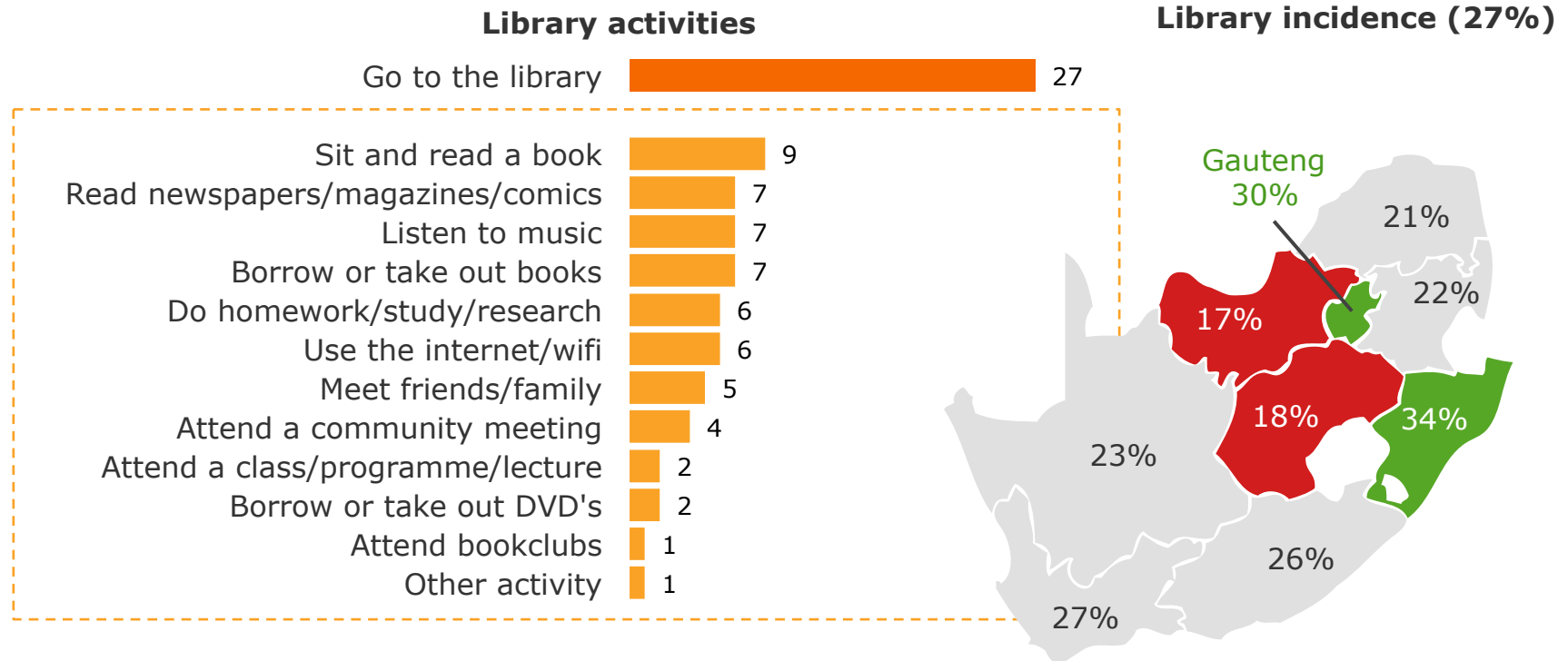
Base: Total sample (n=4000)



© TNS



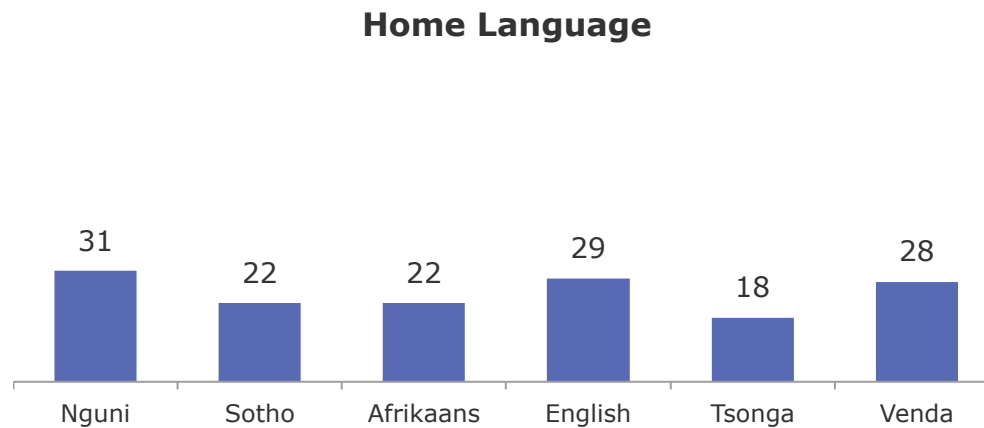
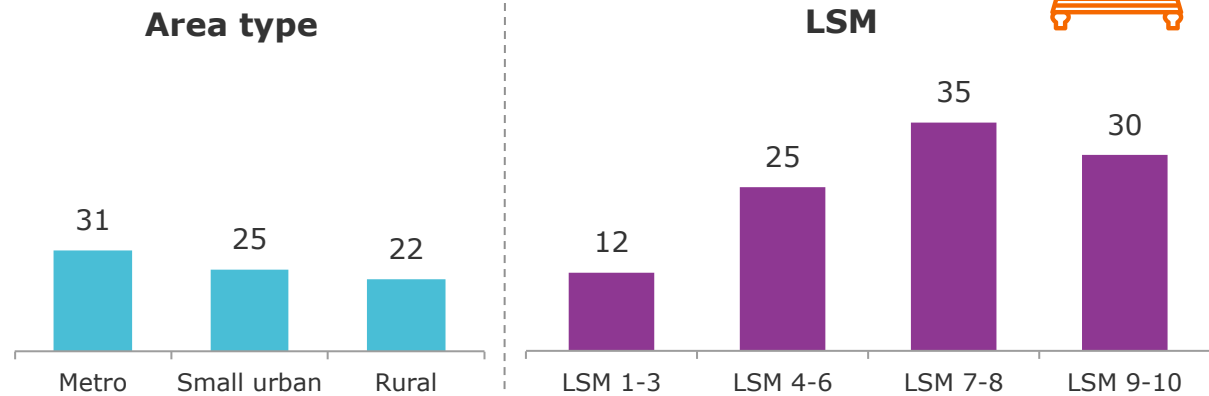
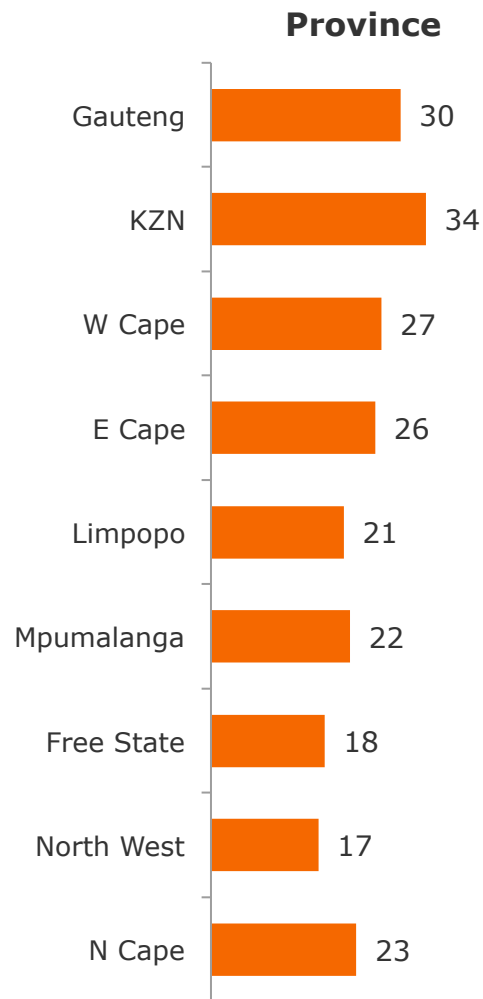
Library usage is highest in KwaZulu Natal & Gauteng and lowest in the Free State and North West Province



Base: Total sample (n=4000)

'Visit library' incidence – by demographics

Average: 27%

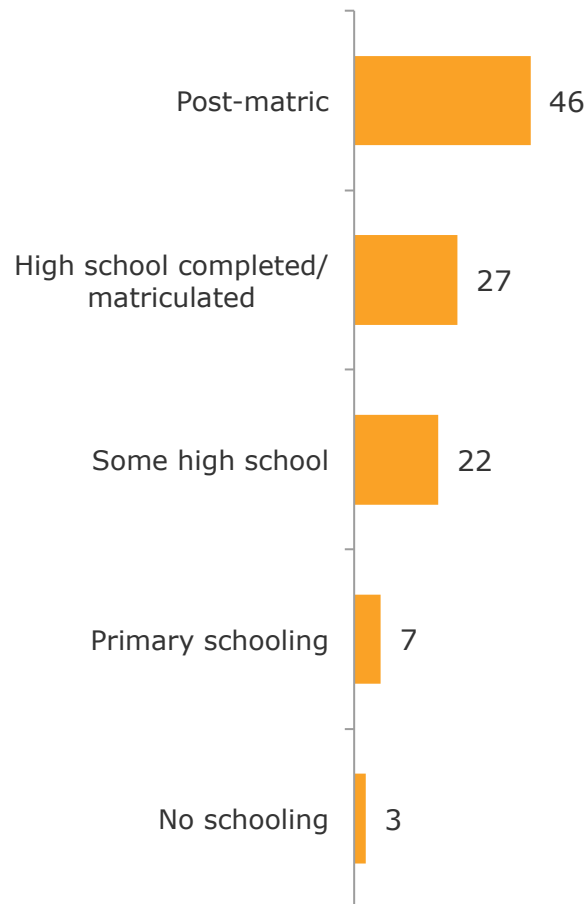


'Visit library' incidence – by demographics

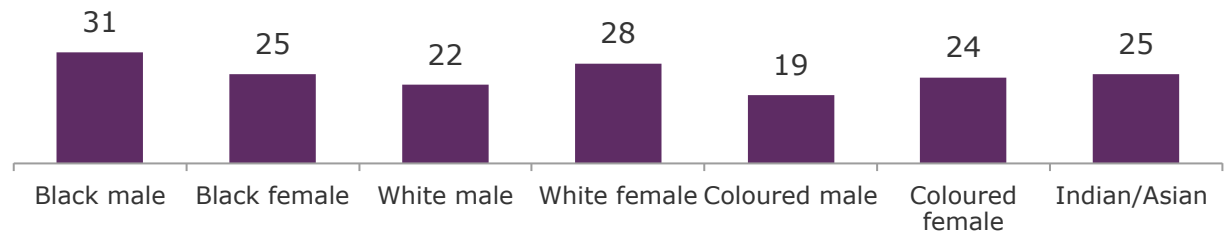
Average: 27%



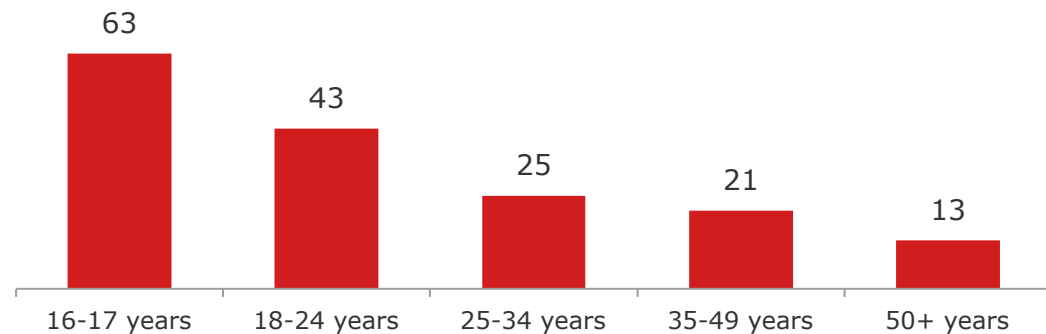
Education



Race/Gender



Age



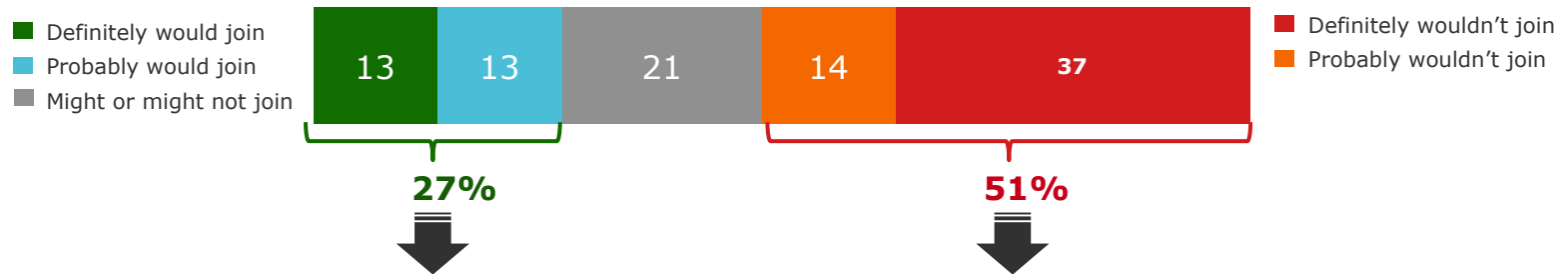
Base: Total sample (n=4000)



People are reluctant to join a library because of no spare time and lack of interest



Likelihood to join a library or mobile/container library close to where you live (amongst those never going to the library) (n=2876):



Reasons for joining (n=716):

- 21%** To gain more knowledge
- 16%** I like reading
- 11%** Access to different books/reading material
- 5%** It will be easier to get to
- 8%** Other

Reasons for not joining (n=1516):

- 27%** Don't have time/other commitments
- 26%** Don't like it/not interested in reading
- 13%** I'm too old
- 7%** Other

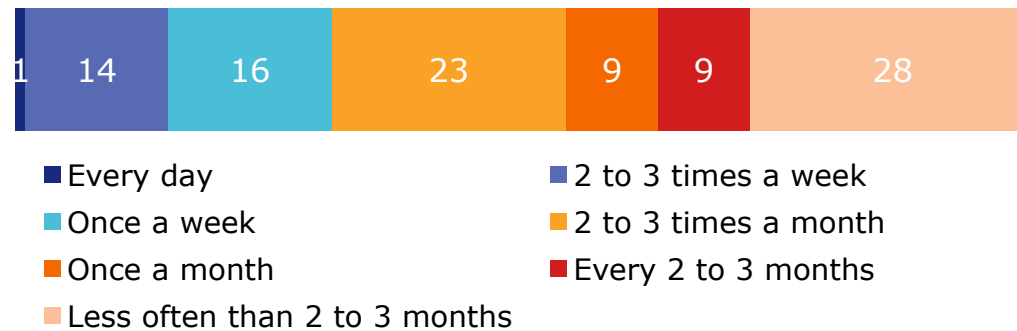


Base: Never go to a library (n=2876)
Mentions over 5% shown

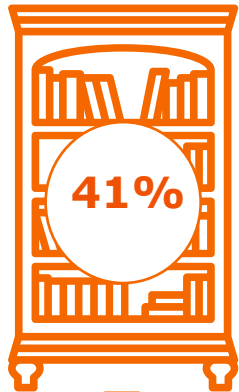
Amongst library visitors, over one-half (54%) visit the library 2-3 times a month or more often



Frequency of visiting the library (n=1124)



Library membership



41% of people who visit the library have a Membership



4.1m members

	Gauteng	KZN	W Cape	E Cape
Base: visit library	441	247	151	112
	%	%	%	%
Yes	41	33	73	46
No	59	67	27	54

- Highest membership in W. Cape

Reasons for not having a library membership (amongst those visiting a library) (n=654):



- Close proximity, no time and lack of regular visitation are the main barriers to taking up membership at the library

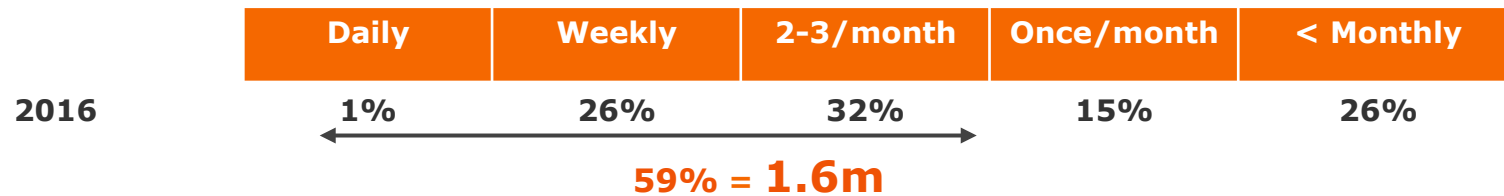
Base: Visit library (n=1124)



Library borrowing patterns: 6 in 10 are borrowing books 2-3/month or more often; 4 in 10 are likely to only borrow one book at a time - higher % vs. 2006

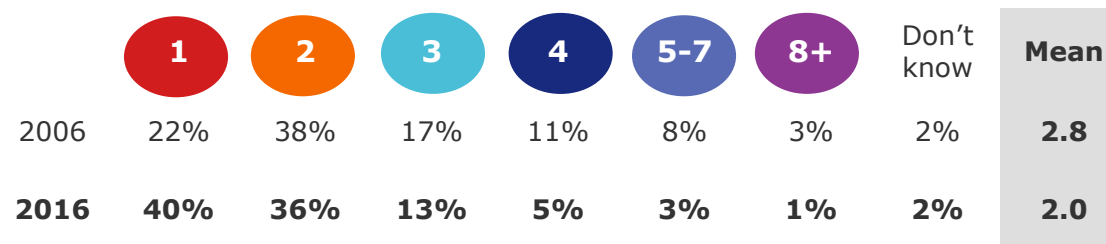


Frequency of borrowing books from library amongst those borrowing books (n=315)



- Six in ten are borrowing books 2-3 times a month or more often

Number of books borrowed on each visit amongst those borrowing books (n=315)



- Average number of books borrowed at a time has dropped from 2.8 to 2 books

Most library users either walk or take public transport to access the library; fewer than 1 in 6 use cars



- Walking to the library and taking the car there are both lower than in 2006 whilst taking public transport has increased significantly

Distance of main library from home

	2006	2016	
<10 mins	53%	26%	Longest: Limpopo 36 mins
11-30 mins	37%	53%	
31-60 mins	6%	13%	Shortest: W. Cape 15 mins
> 1 hour	3%	6%	
DK	-	2%	
Mean	17 minutes	26 minutes	

- Average time taken to reach the library has increased by an additional 9 minutes in 2016; over one-half claim that it takes 11-30 mins to reach the library

One in 3 respondents with children in the home, read to their children: largely educational material and in the evenings

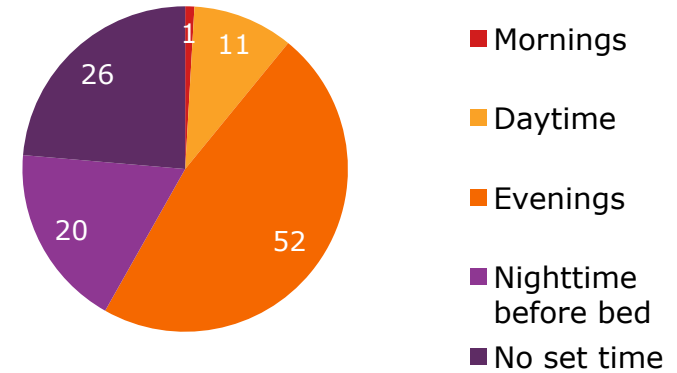


Frequency of reading to children amongst those with children (n=1955)

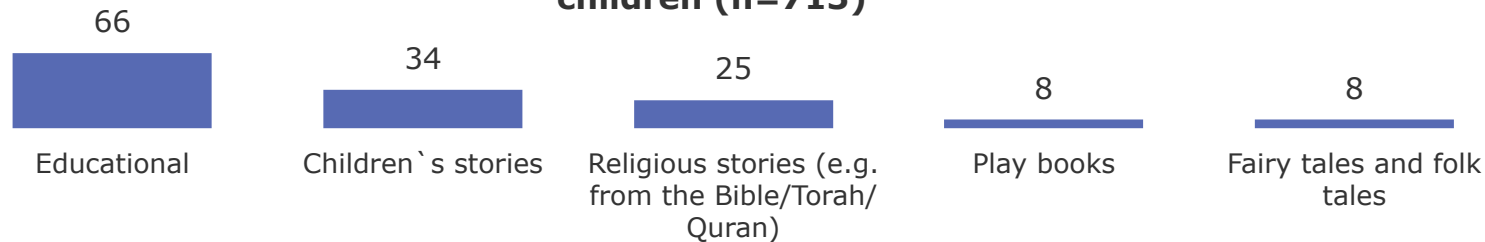
35% read to their kids



Time of day read to children amongst those who read to children (n=713)



Types of reading material with children amongst those who read to children (n=713)



Base: Have children (n=1955); Read to children (n=713)
New Q's for 2016



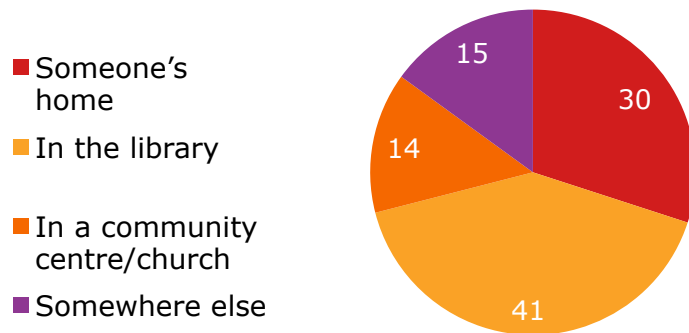
Book club membership: 6% of (any) book readers belong to a book club, translating into 0.6m adults



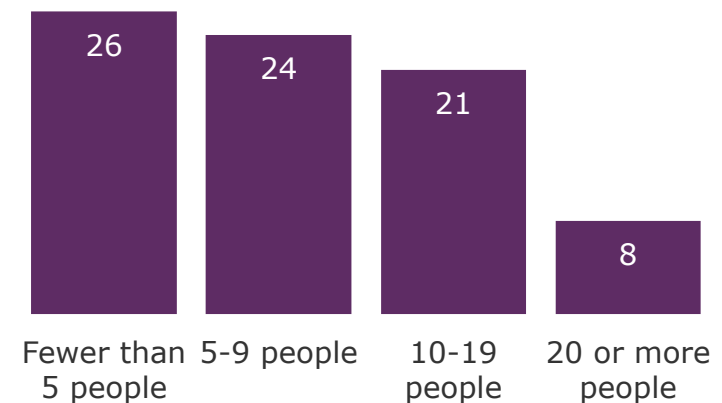
6% of any book readers belong to a book club

1% of total sample belong to a book club (=0.6m)

Book club venue (n=60)



Number of people at book club meeting (n=60)

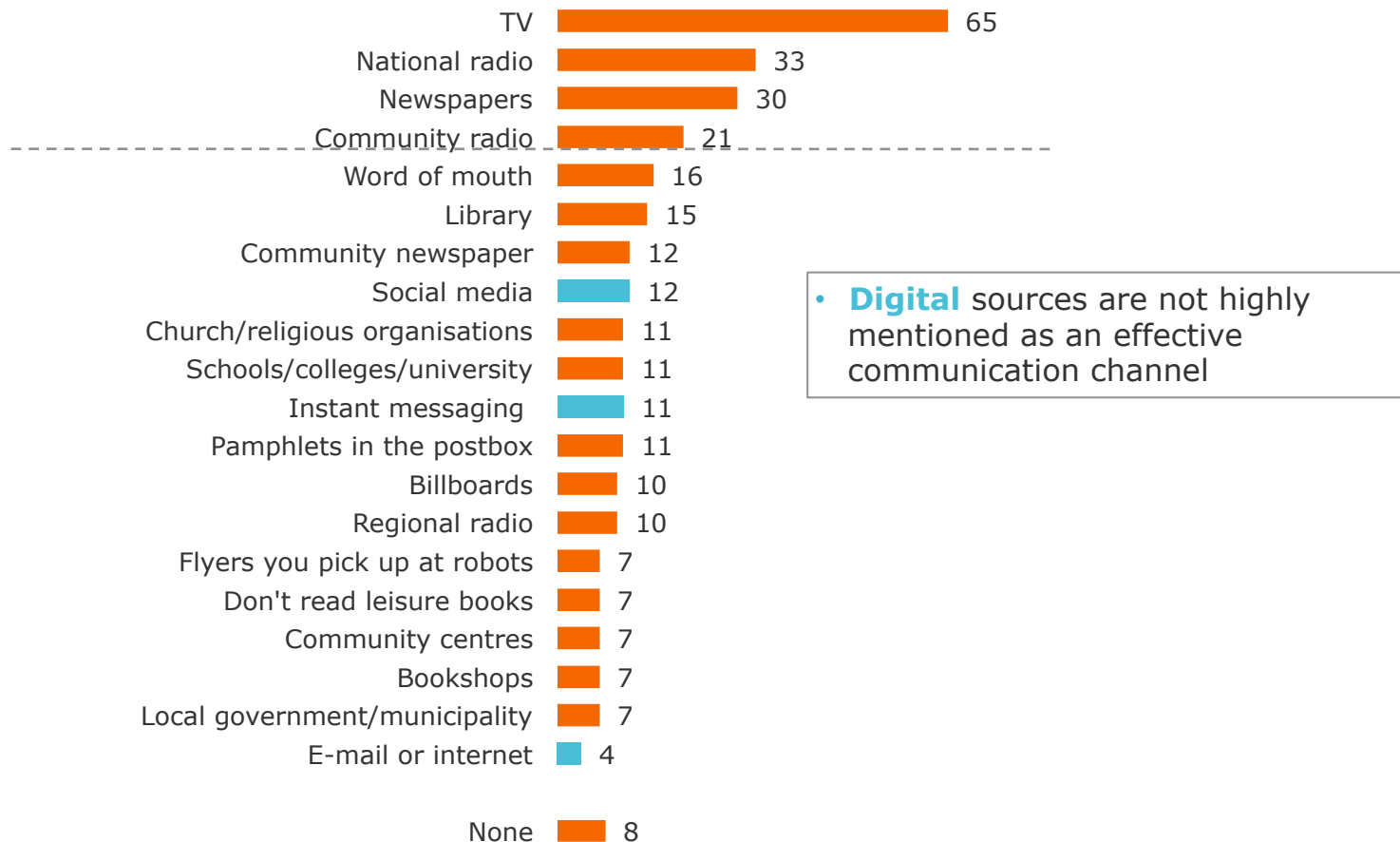


Base: Belong to a book club (n=60)



TV is cited as the best source for information about reading books, followed by radio and community radio, as well as newspapers

Best ways to be informed about reading or accessing leisure books



Base: Total sample (n=4000)

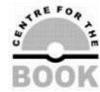

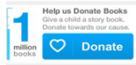







© TNS



Any community media would be recommended for reading communication - especially radio for LSM 1-3



Almost one in five adults have heard about at least one reading initiative; 7% have been involved with a reading initiative

Awareness* and usage of reading initiatives	Awareness (n=4000) %	Involved with/Read or listen to (nett) (n=4000) %		Awareness (n=4000) %	Involved with/Read or listen to (nett) (n=4000) %
Any initiative	19	7		Centre for the Book	2 / 1
 National Book Week	7	2		1 Million Books Campaign	1 / 0
 Kha Ri Gude	7	2		Run Home to Read	1 / 0
 World Book Day	6	1		Room to Read	1 / 0
 Nal`ibali	4	2			
 Read to Lead	3	1			
 FunDza	3	1			

*Awareness was measured via showing logos of the initiative

Base: Total sample (n=4000)



One-quarter of SA adults living in Gauteng, Free State or Limpopo are aware of at least one reading initiative; lowest awareness in Mpumalanga

Awareness of reading initiatives by province

	Total	GP	KZN	WC	EC	LIM	MP	NW	FS	NC
Base size	4000	1442	690	555	410	272	212	184	175	60
Aware of any initiative	19	26	15	18	19	23	9	11	24	14
National Book Week	7	11	4	8	6	9	4	5	8	4
Kha Ri Gude	7	9	6	5	6	11	3	5	12	6
World Book Day	6	10	4	9	3	6	1	3	7	2
Nal`ibali	4	3	5	1	10	6	1	2	5	4
Read to Lead	3	4	2	4	3	3	1	1	4	-
FunDza	3	4	3	1	1	4	-	2	1	-
Centre for the Book	2	4	1	1	1	2	1	1	3	-
1 Million Books campaign	1	3	1	-	1	1	1	1	-	-
Run Home to Read	1	1	1	1	2	1	1	1	2	-
Room to Read	1	1	1	1	-	-	-	1	1	-

Note: double digits highlighted

- 14% awareness of any initiative in rural areas rising to 25% in metro areas



Base: Total sample (n=4000)

© TNS

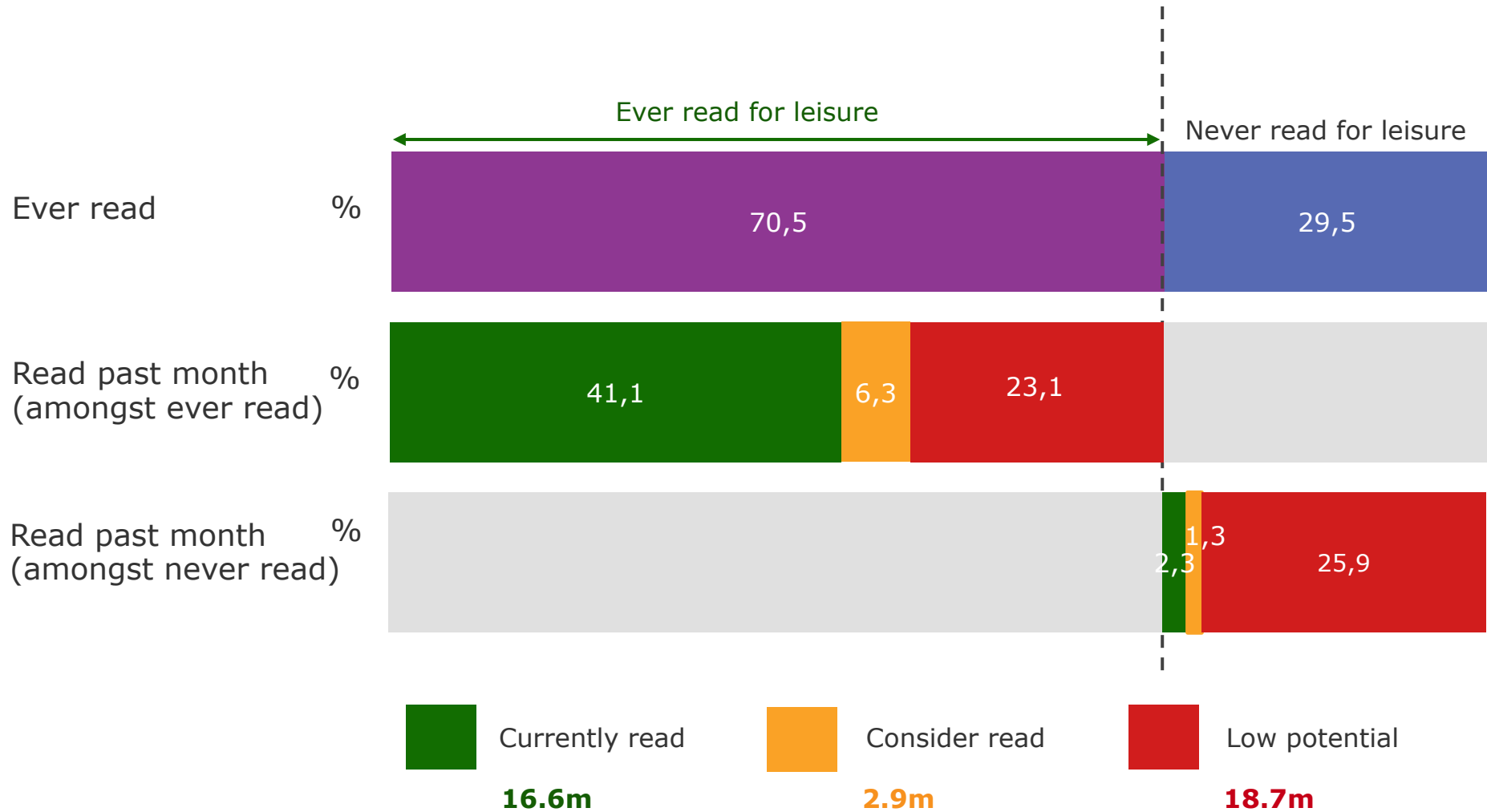


5

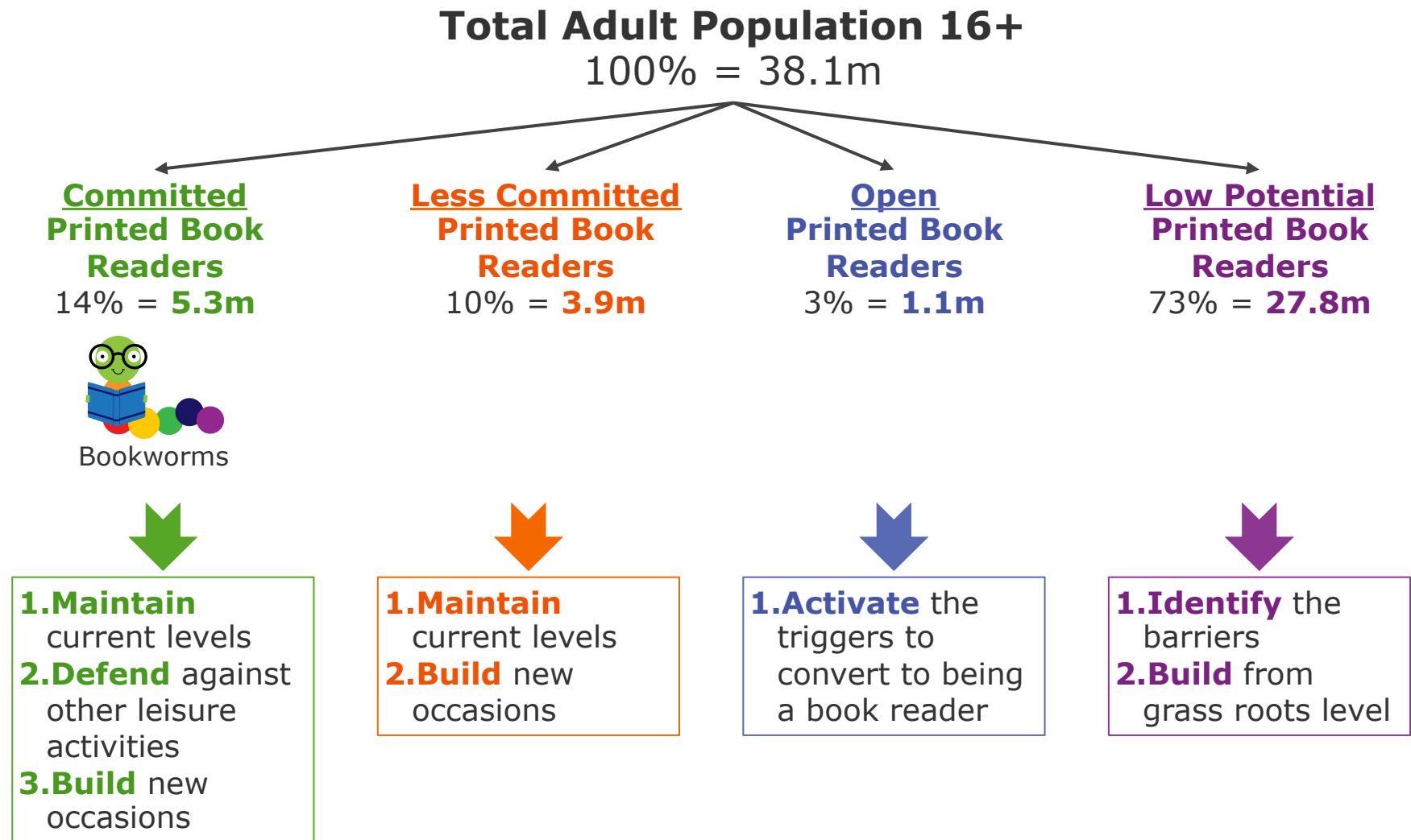
Creating a reading culture



Sizing the reading landscape:



Book reading segments: strategy



To reiterate: Why is reading (books) important?

Five broad strategies

- 1 Promote reading for enjoyment to adults, youth and children
- 2 Increase access to books and stories
- 3 Promote indigenous language reading and books
- 4 Implement a coherent book development strategy
- 5 Increase the importance of books in South Africa

Growth summary



Growth insights

Who? Education is the stand out demographic variable that is associated with reading. Additionally, SEC level (related to education) and age are also strongly related to reading levels. Provincially, Gauteng shows highest potential for immediate uptake

What? Time-poor lives make up the biggest barrier for reading's potential going forward; Whilst absolute cost is less important than other factors, the value proposition cannot be ignored

When? Reading needs to be incorporated into everyday lives of people and be appropriate and relevant for a wider variety of contexts

How? Library visitation has dropped significantly since 2006; Reading in indigenous languages is low due to limited availability of content; Current awareness of reading initiatives is one in five adults, rising to almost one in four in Gauteng, Free State and Limpopo

Precise plans for growth

Who? Develop different initiatives for different ages and role in the family, incorporate more community-focused activities to harness the local group dynamic; Target Gauteng as the province showing the greatest immediate potential

What? Create content that is quick and easy to read and understand; Build more content for mobile phones to increase the number of occasions and ensure that reading can occur in any context; Communicate the benefits of reading to reinforce value perceptions and drive up reading time

When? Build content that can complement frequently conducted leisure activities, which tend to be more passive, and bring reading into the home

How? Increase access to libraries and ensure there are reading activities that are quick to facilitate there; Build up indigenous language capabilities from early ages by encouraging story telling by caregivers; Identify what has worked to date to drive future reading initiatives; Invest in a national reading campaign to drive behaviour change

Thank you

