



BOOKS AND LITERATURE STATUS REVIEW



2016

ANNUAL REPORT OF THE BOOKS AND LITERATURE PANEL



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Books and Literature Status Review 2016

Annual Report of the Books and Literature Panel

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TRENDS AND DEVELOPMENTS IN BOOKS AND LITERATURE – 2016

With this annual report, the Books and Literature Panel seeks to provide both an overview of, and insight into, current trends and developments in the world of books and literature. Whereas discussion of books and literature usually focuses on content and aesthetics, the main aim of this report is to highlight a range of exterior factors that impact upon books and literature; factors which combine to create certain base conditions with regard to the publication, sales, lending and reading of technical, academic and fictional literature.

We build on last year's report, which established an initial, large-scale statistical foundation for the assessment of trends within the production, distribution and reading/use of books. This year's report is chiefly descriptive and analytical within each of these three fields, but in this introduction we wish to pull together some headline trends and highlight certain emerging tendencies that go beyond the report's statistical data. In last year's report we focused on three overarching and mutually linked trends in the books market and in the realm of literature: digitisation, liberalisation and globalisation. It is in the nature of these beasts that they remain highly relevant. What we do here is point to concrete features within these trends that have emerged over the last few years.

DIGITISATION: GROWTH, POTENTIAL AND PROBLEMS

The digital books market has seen steady growth, both in terms of such books being published and in terms of readership. In fiction, the number of first edition e-books has risen by 83%; from 1,509 in 2012 to 2,762 in 2015. Non-fiction shows an increase of 70.4% in the corresponding period; from 970 first edition e-books in 2012 to

1,653 in 2015. Big publishers such as Gyldendal and Lindhardt & Ringhof have played a huge role in this area. Gyldendal, for example, has almost doubled its number of e-book publications; from 375 titles in 2014 to 736 in 2015. In 2015, Lindhardt & Ringhof announced an ambitious digitising strategy based on publishing 15,000 e-book titles over a period of two years. *People's Press* publishers, meanwhile, have announced a plan to double the digital end of its book turnover. However these e-publications do not by any means solely encompass new literature. What we are seeing in these years is a significant element of re-publication of older literature and an associated rise in commercial competition for the 'back catalogue'; in other words, the securing of digital rights to literature that's already been published in paper formats, and which can still have commercial value. One important obstacle at the moment when trying to assess the digital curve in literary trends is that the present registration system makes it impossible to view book titles comparatively; that is, across publication formats. For example, it's impossible to conclude how much the growth in the actual number of titles is due to the fact that a book was published both as an e-book and also as a physically printed book.

Readership figures also indicate a growing interest in digital publications. For whilst it's still true that more than half of all Danes (60.6%) have never read an e-book, we find that by 2015, 9.2% of Danes are reading e-books at least once a week compared to 8.4% in 2014. Moreover, e-book reading is more widespread in Denmark compared to other Scandinavian countries. 2015 saw a rising graph of public library lendings of e-books from library 'e-shelves', or what in Denmark is called 'eReolen'. However, as a result of a decision by a number of the bigger publishers to stop making their e-books availa-

ble to eReolen from the turn of the year 2015/16 onwards, the number of e-lendings fell back to a lower level in the Spring of 2016. Subsequently, from March to July, e-book lending has been lower in each month than the corresponding month the year before.

One notable development is the ‘quiet revolution’ that has taken place within the digital audiobook sector. Up until fairly recently, audiobooks were mainly used by people with restricted reading capabilities; this might be due to a visual impairment and/or refer to children that haven’t yet learned to read. Today, however, the audiobook has broken through that particular ‘glass ceiling’ and has obtained a much broader target audience. In the first half of 2016, public lending of online audiobooks from the eReolen system is greater than lending for e-books, and this growth has taken place in a situation where the number of available audio-book titles on eReolen is significantly lower compared to the number of e-book titles. Commercial sales of audiobooks have also grown apace. ‘Danish Publishers’ (an umbrella group for publishers in Denmark, formerly known as ‘Forlæggerforeningen’ – the Publishers Association) reports that digital sales of audiobooks rose from DKK 38.3 mill in 2014 to DKK 49.8 D mill. in 2015. Online audiobook sales also include subscription based sales and in this market the Swedish owned Storytel is by far the most important player in Denmark. Storytel runs audio-book services in Sweden, Denmark, Norway, Finland, Poland and Holland, and in 2016 Storytel bought out its only real competitor in Denmark – the app based e-book and audiobook service ‘Mofibo’. With this purchase, Storytel gained access to approx. 40.000 new subscribers via Mofibo.

The spread in the use of smartphones and tablets has contributed to making the audiobook a more suitable and attractive medium, which means literary works can be experienced in ways and at times that are not possible with a physical book. It’s also possible that, by their very nature, the format of the audiobook and subscription based sales of audiobooks may contribute to a change in the form and content of literature as a genre. For example, Storytel ran a competition in 2016 in which Danish authors were invited to submit proposals for serialised stories in an audiobook format. Of course, serialisations are a long established literary format, but this form of literature has gained renewed currency with streaming services whose owners

are keen to produce material that will persuade their target audiences to renew their subscriptions.

However despite the advance of digital literature, Danish publishers still find it difficult to make a return on e-books. Danish Publishers report a decline in turnover on e-books of around 10% in the 2014 to 2015 period. On the other hand, digital educational material for primary and high schools has seen significant growth, which must partly be seen in the context of a large scale state and local authority initiative to increase IT involvement in schools. This is one of the reasons that in 2015 turnover for Danish publishers within the educational material market as a whole; that’s to say both physically printed and digital publications, constitutes more than a third of their publishing activity. In recent years, the share yielded by fiction and factual literature has fallen to around half of total turnover.

The public sector ‘IT in schools’ initiative and the growth in sales of digital educational text books reflects a more fundamental change in our understanding of what a textbook actually is. For example, the conventional textbook, bought as a set for a whole class, now has competition from school subscriptions to learning portals. Where the trend was previously towards developing supplementary digital content for the primary physical textbook, today we are seeing more and more that the digital learning environment is the educational fulcrum. This does not just involve text material, but also various types of knowledge resources conceived and delivered in a pedagogic framework with, for example, accompanying projects and collaborative assignments. This implies, all other things being equal, that production of a textbook requires more resources and is now, often, less of a task for just one individual. In principle, digital technology makes a much greater amount of material available to both teacher and pupil, but at the same time the material offered by the new learning portals is often restricted to a particular set of texts and they thereby constitute a new form of ‘gatekeeping’ in schools.

THE LENDING OF E-BOOKS: CONFLICT OF INTERESTS

Problems in creating a business model for e-books has led to conflicts; not least between

public libraries and certain publishers around the issue of digital lending from eReolen. The dispute centres especially on the type of lending model that's chosen. In essence, digital technology allows for unlimited access to e-books, whilst a market based approach will restrict access, particularly to popular titles and thereby ensure a commercial basis for producing and selling e-books. Some authors have also been critical of the growth in lending from eReolen. As early as 2012, this dispute led to a formal split in which a number of publishers, including some of the largest publishers like Gyldendal and Politiken, pulled out of the lending system. Indeed for a time there were two competing digital lending systems – the public library eReolen and the publishers own ebib.dk. At the end of 2014, the publishers concerned re-entered the eReolen system, which in turn increased the number of available titles. The result of this was a significant growth in e-lendings. As mentioned above, several publishers then left eReolen again at the end of 2015.

The final satisfactory balance between the commercial e-book market and public library e-book lending is a long way from being found at the moment, and the various interested parties are still discussing where this should lie. Studying the number of commercial unit sales and the number of public library lendings, both for physical books and e-books, has enabled the panel to provide a basic overview of their mutual relationship in our report. This shows that, both in 2014 and 2015, there are more lendings per sold copies of physical books than for digital books. At the same time a modest increase can be seen, for both physical books and e-books, in the ratio between lendings and sales.

In order to illustrate some of the problems that affect the relationship between the desire on the part of public libraries to digitise literary works and the private sector's interest in developing a commercial market for e-books, the Books and Literature Panel held a public seminar on the 3rd of May 2016. At this seminar, and amongst other topics raised and discussed, insights gained in other countries with regard to the potential for the cannibalisation of the commercial e-book market formed part of the debate. In his contribution, Professor Frank Huysmans from the University of Amsterdam, Holland, stated that the Dutch experience indicates that cannibalisation of the commercial e-book market by public library lending is

limited; but here we must also take into account that the number of available titles in the Dutch public library system is significantly lower compared to the Danish system. In her own analysis, Professor Elena Maceviciute from Borås University, Sweden, pointed out that the key stakeholders involved do not always act rationally. Uncertainty over the possible consequences of current developments leads some stakeholders to curtail certain ongoing initiatives so as to ring-fence existing positions, whilst others make disproportionately extensive efforts to develop areas that, in the interim, only constitute a modest part of overall activities. Read more on the views of these two researchers in the two essays contained this annual report.

Another area of public library activity that has provoked major debate in recent times is the growing volume of library material that is being discarded. Overall, as the panel shows in this report, the figures reveal that, despite this scrappage policy, public libraries today hold more titles than they did four years ago, but that there are fewer copies of these titles. Even though almost 40,000 titles have been completely removed from public libraries in the same period, ongoing book purchases mean that the number of titles on offer has actually risen by 1,052 since 2012.

NEW STAKEHOLDERS IN THE BOOKS MARKET

One of the more significant changes brought about by the process of liberalisation in the book market is the fact that books can now be sold by outlets other than traditional bookshops. Moreover, the long term trend since the turn of the century has also been that traditional bookshops are in decline, whilst supermarkets and online booksellers are making headway. More and more books are being sold over the internet, or are purchased as part of the daily shopping cycle in supermarkets. Danish bookshops also face competition from big companies like Amazon and Apple with regard to the purchasing by Danes of foreign fiction and factual literature. However, the physical bookshop still carries a substantial element of the book sales market. The Danish Booksellers Association's February 2016 study indicates that around half of Danes made their most recent book purchase in a traditional bookshop.

The quantitative growth in sales outside of bookshops is, however, only one aspect of current trends. A range of qualitative changes are also taking place; changes that in the long term may prove to be more significant. With the advent of online distributors like Saxo's online bookshop and the streaming service Mofibo, the nature of the stakeholders and business models involved sees a big change. Quite apart from its primary activity as an online bookshop for both printed and digital books, Saxo is also moving into the publishing arena and sells services to authors seeking to publish their books. On top of this, Saxo is experimenting with new types of books and strategies to attract new authors. One example of this is the 'Metro Literature' project that is now in its fifth year. In collaboration with Copenhagen's Metro train service, a talent competition is held for new authors and the winners get their short stories published online. These are made free for download by Metro passengers. In this way, experience and insight is gained into forms of publishing and distribution that are adapting to new readership situations and, at the same time, Saxo receives a good advertising bump.

The continued growth of Mofibo and other subscription services means that we are witnessing a change in the actual nature of the sale and reading of books. In contrast to traditional book sales, which proceed in a piecemeal fashion, the purchaser in this new scenario has unlimited access to an entire library of books, which he or she does not own, but rather has the right to use for a given period of time. The attention and interest of the consumer is thereby shifted from the value and attractiveness of an individual book to the contents of the whole library. Moreover, if this library is to retain its value for its users, it must contain a sufficiency of new and varied titles to make sure there's always something interesting to choose as the next book. In concrete terms, it also means that a publisher has only formally sold the relevant book via the subscription service when the reader has read a given percentage of the book. This is radically different to the usual ad hoc sale of books across bookshop counters where, in commercial terms, the question as to whether or not a customer actually opens and reads the purchased book is irrelevant. The emergence of such commercial 'libraries' also means that the public library network, and especially the

eReolen system, now has a direct competitor for reader attention.

There are also now a range of hybrid models that lie somewhere in between Mofibo's 'all you can read' model and the traditional unit sale approach. Online booksellers like Saxo and Plusbog.dk offer special membership deals whereby, in return for a monthly subscription or membership fee, readers can purchase books at highly reduced prices. In this type of model, earnings on the actual physical or digital book are reduced in return for membership payments; for which reason we have seen the development of exclusive member services and offers, which are intended to encourage customer loyalty. In some ways this is reminiscent of traditional book clubs, but the selection of books on offer at discounted prices for members is not just restricted to a few titles per month, but rather a much vaster catalogue.

Thus, traditional publishers and bookshops are now faced with new competitors, and this annual report illustrates the extent to which the production of fiction and factual literature by publishers has been transformed. The number of publishers of fiction for adults has risen by 50% during the last decade, and this is, not least, due to the emergence of more self-publishers and one-man band publishers. In 2006, the ten biggest publishers of new fiction were behind 57.8 % of that year's new titles. By 2015, we see that the ten biggest publishers of new fiction are responsible for 54.5 % of new fiction. However, a significant shift has taken place in this top ten of most productive publishers. If we look at the ten biggest publishers in 2006 and follow their production of new publications up to 2015, their share of new publications in the book market falls to 19.3% by 2015. In fact, we see that by 2015 publishers like Mellemsgaard and Books on Demand are amongst the ten biggest publishers of new fiction publications. This indicates that self and joint-publishers are beginning to play a much greater role in the books market, at least where the number of titles on offer is concerned. Thus, the growth in the number of new titles is also happening as a result of the fact new stakeholders with new forms of publishing have broken into the market. However, in the same period, some of the existing large-scale publishers have become even bigger. For example, in 2016 Gyldendal bought out Nyt Nordisk Forlag. There has been a modest decline in the group of medium sized publishers, here measured by the

number of publications per year. In the period between 2006 – 2015, the fall in the number of publishers that publish between 11 to 50 titles per year is by 2 percent – from 84 publishers (out of an overall total of 791) in 2006 to 74 publishers (out of an overall total of 860) in 2015.

The appearance of new publishers in general, as well as publishers such as Mellempgaard and Books on Demand in the top ten for fiction titles, is evidence of an ongoing transformation of the publishing sector. Furthermore, where the increased role of self-publishers as title providers is concerned, we can actually speak of a structural change, in that the very act of publishing a book is changing character. With self-publishing, the publisher's usual editorial role morphs somewhat into a more author-driven publication format. However, self-published publications do not to the same extent become part of the established literary circuit or society's general cultural milieu. As this report shows, self-published books are not bought in by public libraries in anywhere near the same amounts as titles from established publishers, and self-published works are only rarely reviewed in the traditional printed media. Thus self-publishing authors must, to a much greater extent, put a lot more effort into making themselves visible in the various arenas of public awareness and also run a much greater risk of never achieving this. If, that is, visibility is their intention – some self-publishers do not crave widespread exposure.

The platform for many of the changes in the book market, like new business models and digital initiatives, was established by changes in world trends. However, so far, no foreign stakeholders have gained a serious foothold in the Danish books market. On the other hand, there have been negotiations between various Danish publishers and Amazon with a view to, in the first instance, selling Danish e-books via Amazon. If this actually comes to pass, Amazon's entry into the Danish market could have significant consequences for the entire distribution network, as well as price structuring for books. In other markets which Amazon has entered, it has been known to lower price levels substantially and outcompete a number of the existing stakeholders in the books market. In discussions surrounding the type of agreements Amazon may possibly conclude with Danish publishers, the question of Amazon's special 'price parity clause' has attracted a lot of attention and the legality of this has been questioned right up to

EU level. All this indicates that Danish publishers may well undertake not to sell books at a lower price than Amazon can offer. Such a clause would give Amazon a significant competitive advantage in the Danish market but, at the time of writing, the extent to which Amazon will be able to come to agreement with Danish publishers remains unclear.

Developments in the Danish book market in recent years have primarily reinforced already existing trends, including digitisation and the emergence of new stakeholders in the books market. With regard to the volume of new fiction titles, future trends appear to be positive. But for factual literature more negative. This latter, perhaps, because we are seeing the growing influence of the internet as an information source for people. This in turn makes the prospect of publishing certain factual books less likely. Thus, to the extent that diversity can be said to be a quality value in itself, the trend for fiction looks good. However the volume of titles on offer cannot be the sole criterion for assessing either true diversity or quality. Where diversity and quality are concerned, not least in terms of wider cultural questions and cultural policy, the decisive factor is that these are present at every step in the lifecycle of a book and the literary standards associated with it; right from production to distribution and then onto reading and use by consumers.

In a series of planned special reports and meetings, the Books and Literature Panel will attempt to shed light on some important aspects in all three stages mentioned above:

- an analysis of the economic situation and circumstances of Danish authors will illustrate the material basis for the actual production of fiction and factual literature, as well as the translation of literature
- an analysis of the book selection on offer in bookshops and supermarkets will provide a basis for assessing and comparing the volume and genre diversity on offer from these two types of vendors
- a seminar on the 6th of December 2016 about quality criteria in the assessment of literature will, amongst other things, debate the influence established literary critics and reviewers have in the literary choices made by Danes
- an examination of existing statistical sources in order to determine book reading habits in Scandinavia will establish a primary basis for

the comparative assessment of Danish reading habits, and also a basis for recommendations that seek to improve statistical methodology in relation to the reading of books, both in Denmark and Scandinavia as a whole.

**The Books and Literature Panel,
21st of September, 2016**

Stig Hjarvard, Chairman (Professor at the Department of Media, Cognition and Communications at the University of Copenhagen)

Gitte Balling (senior lecturer at the Royal School of Library and Information Science, University of Copenhagen)

Kjell Bohlund (publishing consultant and former MD for the Norstedt publishing house, Sweden)

Rasmus Grøn (senior lecturer in Communication at Aalborg University)

Anne-Marie Mai (Professor of Danish Literature at the University of Southern Denmark)

Tue Andersen Nexø (senior lecturer in comparative literature at the University of Copenhagen and critic for 'Information' newspaper)

Rasmus Rex (postdoc at Roskilde University)

INTRODUCTION

Just like last year, the Books and Literature Panel's examination of current statistics covering the Danish books market is based on three phases: the production phase, the distribution phase and the reading phase.

With *production* we are referring, in the first instance, to the book's 'life'. The panel looks more closely at the type of books being published in Denmark, including how they break down across things like genre and the format involved (e.g. a printed book, e-book or audiobook). Of course, and by definition, the very first stage in the production phase is the author's production of literature. However no data is available to assess authors as a group; e.g. with regard their working conditions. The panel has therefore initiated just such a study, which will be published in November 2016.

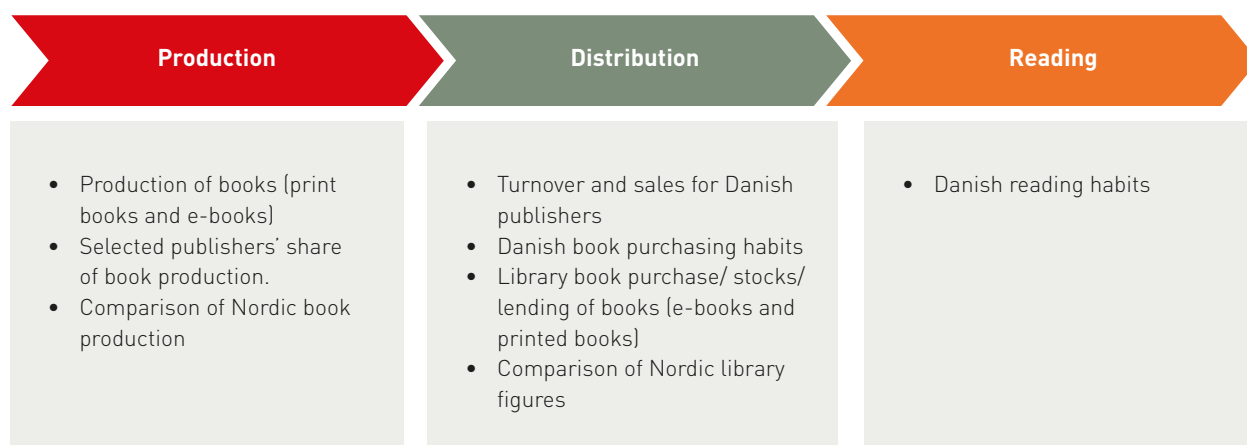
The *distribution* of literature concerns the trading and marketing aspects of society's literature circuit. The panel can, with the data already available, show turnover and sales figures for the publishing sector as a whole. Data on book purchasing habits amongst Danes is also

available. Sales figures for individual book titles are still not publicly available.

The *reading* phase concerns the reading of literature, including how trends in Danish reading habits appear to pan out. However, trends in public library lending of literature are also examined in this phase.

A range of statistics presented in this report are updates of last year's statistics. But entirely new statistical information regarding the Danish book market is also shown in this year's report. Thanks to an analysis of data relating to book production statistics, the panel has been able to examine trends in the Danish publishing landscape and show how much the ten biggest publishers feature in overall book production across a ten year period. Data from these statistics is compared with data showing the number of book/literary reviews in Danish daily newspapers and public library inward purchasing, whereby an indicator can be obtained of the profile status of the relevant publishers amongst, what we might describe as, the public literary

Fig. 1: The report's statistics divided into production, distribution and reading



arena in Denmark. Using this approach, we can see which publishers were most successful in publicising their titles amongst Danish readers.

In the panel's depiction of the role of public libraries in the literary circuit, it has augmented figures for the number of book copies the libraries have in stock with data relating to the number of titles actually available for lending in the libraries. In this way, the panel provides new information as to whether the libraries' book scrappage policy is promoting a decline in the range of literature available to citizens. Furthermore, the panel has compared the figures for public library and eReolen lending with Danish publishing figures for the year's overall unit sales in 2014 and 2015 – this to construct a basic graph showing the relationship between lending and sales. Finally, the panel has carried out a comparison for the report of the figures for Denmark and the other Nordic countries relating to book production, library book stocks and lending.

1.

PRODUCTION OF BOOKS

Production of new fiction in Danish has now been rising for three years in succession. Poetry is the literary genre that has seen the biggest increase. In publishing terms, literature for adults features much more strongly in the e-book category than in printed books.

Main points in this chapter:

- Production of new Danish fiction has risen by more than 50 % since 2009
- Production of poetry published in physical book form has risen by 60 % since 2009
- Production of poetry in the e-book format has risen from 41 titles in 2012 to 174 in 2015
- Half of the fiction published is in Danish, whilst 72 % of the factual literature is in Danish

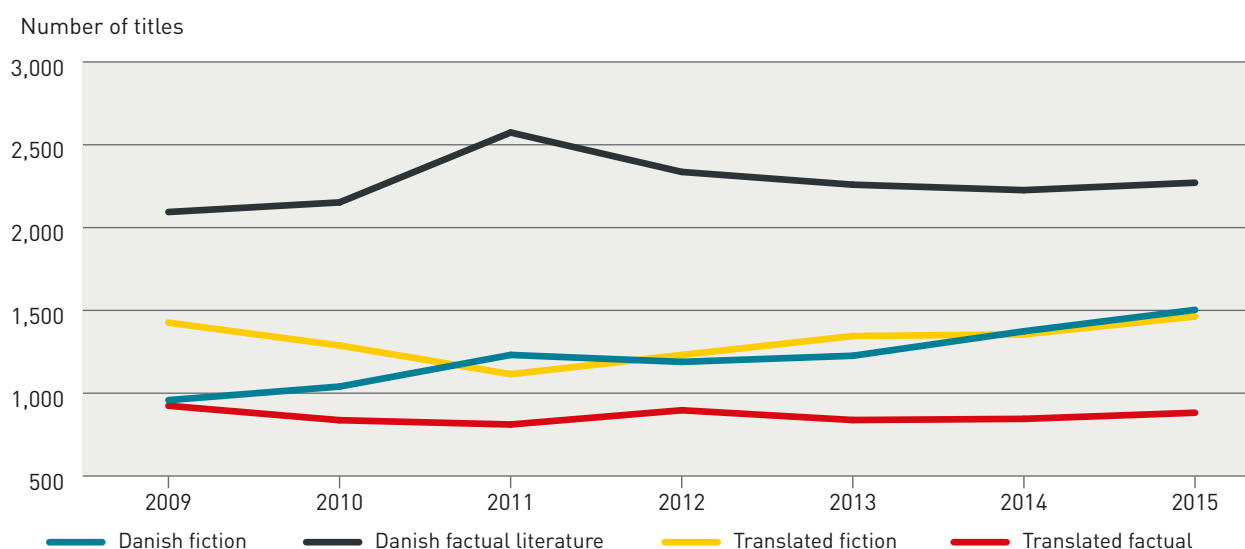
1.1 PRODUCTION OF PRINTED BOOKS

If we look at production of printed books intended for the commercial market¹, we see a rise in fiction production (see Fig. 2). Both works in Danish and translated works feature at the top level in the period covered by the figures, whilst the publication of new fiction in Danish has risen more than 50 % in the same period.

On the other hand, the publication of factual literature in Danish shows more fluctuation, but still a small increase in the period 2014 to 2015, and in 2015 the number of titles produced is slightly higher than in 2009 and 2010. The curve for factual literature in translation in the relevant period is not marked by great fluctuations.

¹ That's to say, excluding scientific and statutory annual reports etc., which also appear in book production statistics.

Fig. 2: Printed commercial first editions, in Danish and in translation



Source: Danmarks Statistik, book production statistics B0G06.

Fig. 3: Commercial – new factual titles in Danish by subject (top ten)

	2009	2010	2011	2012	2013	2014	2015	Trend 09–15
Family history. Genealogy	295	285	360	312	308	295	327	110.8 %
Educational courses. Child Rearing. Teaching. Public Information	186	157	163	138	117	163	152	81.7 %
Medicine. Health Science	124	149	205	161	172	131	142	114.5 %
Courts and the Law. Legislation	121	89	126	95	88	92	74	61.2 %
Home and housekeeping	100	111	119	160	145	140	151	151.0 %
General technology	77	83	125	95	98	90	85	110.4 %
Entertainment. Games Sports	65	87	91	103	89	89	117	180.0 %
General Society-Sociology	65	72	107	68	59	62	67	103.1 %
Economics-finance	57	38	75	46	74	61	52	91.2 %
Language	46	42	59	58	63	56	38	82.6 %

Source: Danmarks Statistik, book production statistics BOG06.

Fig. 4: Printed commercial first editions by original language

	Fiction							Factual Literature						
	2009	2010	2011	2012	2013	2014	2015	2009	2010	2011	2012	2013	2014	2015
Danish	958	1,040	1,231	1,189	1,226	1,374	1,503	2,094	2,152	2,574	2,336	2,259	2,226	2,271
Swedish	130	154	153	161	148	171	163	56	63	51	80	49	60	52
Norwegian	54	52	58	43	97	72	87	26	40	38	37	35	27	38
English/US English	868	768	547	697	728	719	754	620	537	520	590	553	566	569
German	121	106	120	104	105	104	151	79	67	76	39	43	58	81
French	63	45	63	71	85	121	99	38	22	30	24	50	31	47
Other languages	190	163	174	155	182	168	209	105	108	96	127	108	103	95
All languages in total	2,384	2,328	2,346	2,420	2,571	2,729	2,966	3,018	2,989	3,385	3,233	3,097	3,071	3,153

Source: Danmarks Statistik, book production statistics BOG06.

If we look more closely at the subjects² covered by newly published Danish factual books (Fig. 3), we see that from 2009 to 2015 certain subjects have declined markedly, including 'Law and the Courts', 'Legislation', 'Educational Courses', 'Child Rearing', 'Teaching', 'Public Information', and 'Languages'. The subjects that have made progress in the same period are 'En-

tertainment', 'Games', 'Sport', 'Home and house-keeping' and 'Medicine/Health Science'.

If the production of fiction and factual literature is classified by the original language in which the title was written (Fig. 4), we see that approx. half of fiction production is made up of works in Danish³. The other half is dominated,

² This subject classification comes from the Danish Library Centre's (DBC) classification for these categories.

³ NB when publishing the annual book production statistics, Danmarks Statistik computes the data five years backwards. There will therefore be small shifts in the tables vis-à-vis the tables presented in the Books and Literature Panel's 2015 report.

Fig. 5: Printed commercial fiction first editions by genre

	2009	2010	2011	2012	2013	2014	2015
Poetry	113	114	193	137	146	183	181
Drama	30	25	24	26	26	32	25
Novels/Novellas	880	889	828	984	1,030	985	1,057
Humour/Comics	47	50	49	61	62	56	56
Children's poetry	28	19	35	42	26	34	37
Children's fairy tales/fables	8	9	5	6	6	9	8
Children's stories	1,183	1,126	1,152	1,116	1,229	1,394	1,558
Children's humour/comics	95	96	60	48	46	36	44
Total	2,384	2,328	2,346	2,420	2,571	2,729	2,966

Source: Danmarks Statistik, book production statistics B0G06.

first and foremost, by titles translated from English followed by Swedish and then

German (if we ignore the mixed category 'other languages'). In relative terms, however, the share with English/US English as the original language has fallen from being 36.4 % of the total amount of published fiction in 2009 to 25.4 % in 2015.

For factual literature, titles written in Danish represent 72 % in 2015. Titles translated from English/US English represent almost 18 % in 2015 and 20.5 % in 2009.

By examining more closely the subject matter and genres that make up new fiction production as a whole, it becomes clear that fiction production (Fig. 5) is especially dominated by children's literature and novels/novellas for adults – 52.5 % and 35.6 % respectively of production in 2015. Both literature for adults and children's literature has grown since 2009 – novels/novellas for adults by 20 % since 2009, children's tales have risen by 31.7 %. Poetry production (for adults), in both 2014 and 2015, is at a level well above the 2009 mark, having grown by 60 % since 2009.

1.2 PRODUCTION OF E-BOOKS

It's not possible, with the available data, to determine whether an e-book has also been issued as a printed book. This means that the tables (Figs. 6 and 7) below both contain e-books

that have also been issued as printed works in the same year, and e-books based on older physical editions. This latter element will have an increasing presence as the digitising of back catalogues grows apace. This of course implies that a range of older titles owned by publishers will again see the light of day as e-books.

Given the above, along with the fact that the e-book is still a relatively new medium, it's no surprise that the number of e-books shows a rising curve in these years.

From 2012 to, for 2015, the total production of fiction e-books has grown by 83 %. The increase for fiction e-books written in Danish is 73.9 % in the same period (Fig. 6). Where factual literature is concerned, there is a general increase of 70.4 % in this period, and the share of factual literature with Danish as its original language has risen by 56.9 % from 2012 to 2015. Just as with printed literature, most translations are from English/US English.

New fiction e-books are mainly novels (59.1 % in 2015) and children's stories (32.8 %). The reverse is the case for printed fiction production, where children's stories are dominant, and this suggests that the e-book format (for the time being at least) is primarily an adult market. It is, furthermore, worth noting that poetry (for adults) looks to have embraced the e-book format very comfortably, and that the number of titles published has more than quadrupled in this period.

Fig. 6: Commercial first editions of e-books by original language

	Fiction				Factual Literature			
	2012	2013	2014	2015	2012	2013	2014	2015
Danish	980	1,195	1,342	1,704	835	1,050	1,150	1,310
Swedish	107	120	116	179	12	15	25	17
Norwegian	38	50	67	123	10	11	18	16
English/US English	276	417	466	587	93	225	201	210
German	22	49	30	47	9	45	17	67
French	21	35	34	40	1	15	6	5
Other languages	65	85	90	82	10	21	23	28
All languages in total	1,509	1,951	2,145	2,762	970	1,382	1,440	1,653

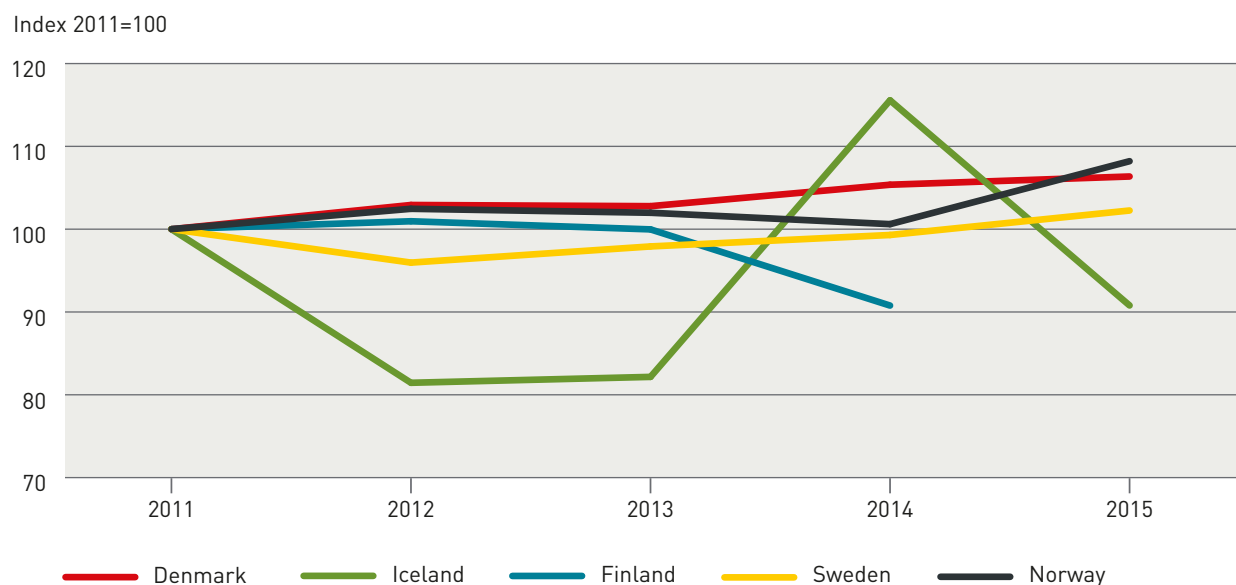
Source: Danmarks Statistik, book production statistics B0G06.

Fig. 7: Commercial fiction first edition e-book by genre

	2012	2013	2014	2015
Poetry	41	84	96	174
Drama	19	23	37	28
Novels/Novellas	952	1,106	1,294	1,633
Humour/Comics	5	7	11	5
Children's poetry	5	4	6	8
Children's fairy tales/fables	–	–	–	–
Children's tales	483	726	687	906
Children's humour/comics	4	1	14	8
Total	1,509	1,951	2,145	2,762

Source: Danmarks Statistik, book production statistics B0G06.

Fig. 8: Index of printed book production in Scandinavia (2011 = 100)



Sources: Sweden: <http://www.kb.se/dokument/2015.pdf>, Iceland: https://landsbokasafn.is/uploads/arsskyrslur/arsskyrsla_2014_enska.pdf, Finland: <http://www.doria.fi/bitstream/handle/10024/123276/Publikationsstatistik%20B%c3%b6cker%202000-.pdf?sequence=2>, Norway: <http://www.nb.no/Om-NB/Pliktavlevering/Hvorfor-pliktavlevere/Statistikk-2010-2014>, Denmark: Book production statistics BOG02.

1.3 BOOK PRODUCTION IN A NORDIC CONTEXT

By comparing the information on the number of titles submitted for national bibliography data in the other Nordic countries, which is the official inventory for books published each year, it becomes possible to compare the trends in Danish book production with those in other Scandinavian countries. Given that the data submitted is interpreted in different ways from country to country, index numbers have been used in Fig. 8 in order to create a basis for comparison that's independent of registration methods in each country.

Over time, Norway, Sweden and Denmark, in particular, have seen reasonably stable progress in the production of printed books. Iceland's situation is characterised by decline in the period after 2009; presumably due to the financial crash. However, the curve does show an upwards trend in 2014, only to fall back again in 2015. Registration methods in Finland are affected by delay; so the latter years of our period have

'missed' approx. 1,500 registrations, which will only be included in the published figures for 2015. Thus, if one ignores 2014, the figures from Finland also indicate fairly stable production in the relevant period.

It is, furthermore, interesting that the National Library of Sweden will in future include statistics for self-published works⁴. It would be likewise interesting, if the Danish Library Centre was to examine the possibilities of doing something similar here at home, so that Danish self-published works can be compared in a Scandinavian context. Of course the fact that it can be difficult to define exactly what a self-published work actually is would need to be clarified.

⁴ "Utgivningspuls 2015 Nationalbibliografin i siffror" – (The National Library of Sweden in numbers) says the following: "A new element from 2015 onwards is that all self-published literature will be registered by the National Library in order to better analyse the following annual statistics report. Self-published fiction will be classified as per the Dewey system. Self-published factual literature will be classified as per the Dewey system by the title, or whether the author was previously published by a publishing house."

2. THE PUBLISHING LANDSCAPE 2006-2015

New publishing houses have emerged and the traditional stakeholders are not quite as prominent in the overall production picture as they were ten years ago. However, the new publishers have found it difficult to achieve a major public library presence or newspaper reviews.

Main points in this chapter:

- The share of publishers only publishing a single title holds steady in the period 2006-2015 – over 50 %.
- Slightly more than 3 % of the publishing houses, publish more than 50 books a year.
- There were 155 publishers of Children and Young People's Literature in 2015. The highest figure yet.
- 47.7 % more fiction publishers have emerged over the last ten years.
- The ten biggest fiction publishers, measured by production share, were responsible for 51 % of the total of new fiction in 2006. In 2015, the figure for the same ten publishers was 19.3 %.
- The self/joint publishers, Mellempgaard and Books on Demand, are among the ten biggest publishers in 2015, measured by the number of fiction publications, but their titles are only bought in by public libraries on a limited basis and they are rarely reviewed in the daily newspapers.

Classification of the country's publishers according to the number of publications achieved shows clear stability over a ten year period. This is shown in **Figs. 9 and 10**. If we divide the publishers⁵ into stages, governed by the number

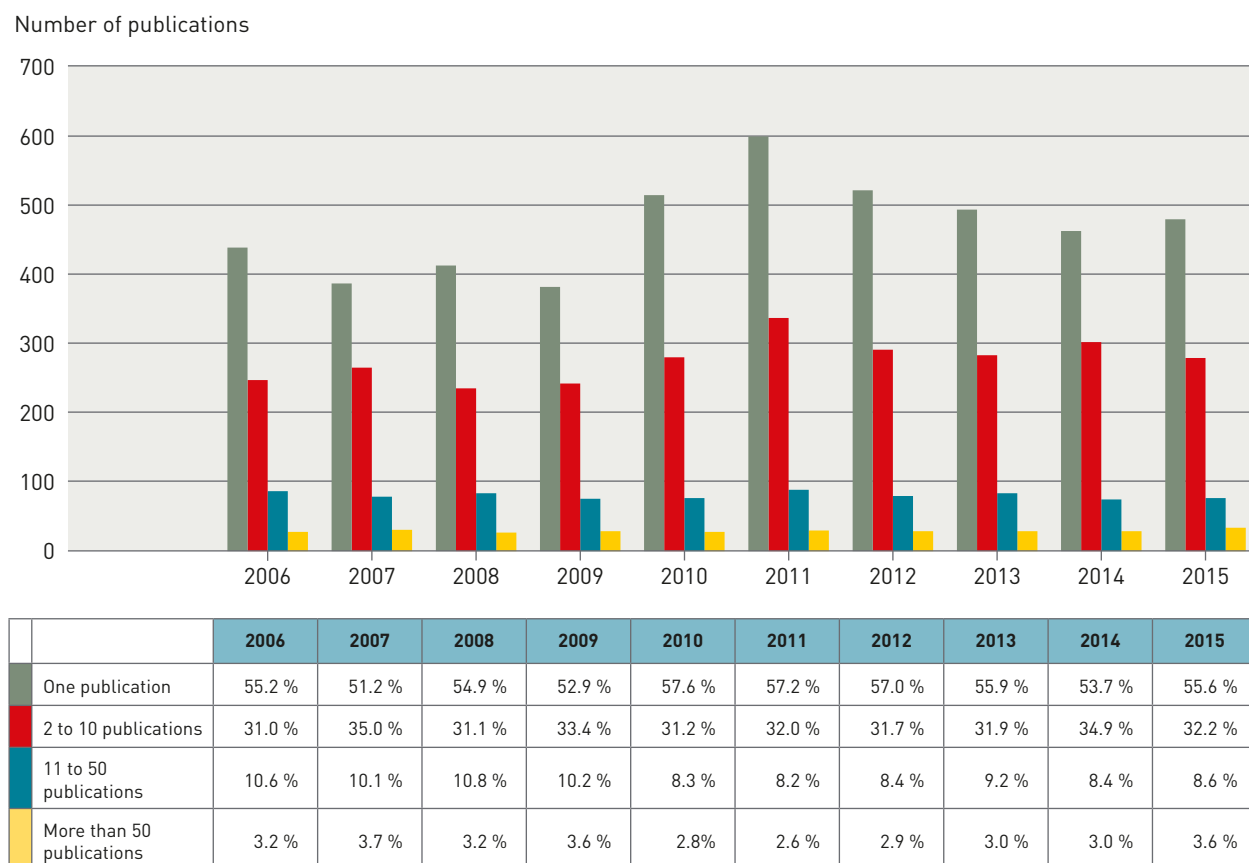
of titles they have published in a given year, we can see that the biggest fluctuation is in the middle group with between 11 and 50 titles per year. From 2006 to 2015, the share of publishers amongst this middle sized group fell by two percentage points from 10.6 % to 8.6 %; nominally from 84 publishers in 2006 to 74 in 2015. The share of publishers just publishing one title fluctuates slightly in the period as a whole, but both in 2006 and 2015 is found to be just over 55 %, and at no point in the period does it drop below 50 %. The share of publishing houses publishing between 2 to 10 books per year, fluctuates in the period – between 31 and 35 %. Slightly more than 3 % of the publishing houses publish more than 50 books a year. The lowest level for the biggest publishers comes in 2011, where they make up 2.6 % of the combined number of publishers.

2.1 PRODUCTION OF FICTION FOR ADULTS BY PUBLISHERS – 2006-2015

Though the number of publishers of literature as a whole in Denmark is generally stable (if one looks at the figures in the round), fluctuations become apparent once we look more closely at the number of fiction publishers for adults. As **Fig. 10** shows, the number of publishers has risen by 47.7 % in the last decade. This increase is especially due to the fact that far more one-man band publishers and self-publishers who publish in their own name have entered the market. This trend was highlighted in the Panel's study last year – "Alternative forms of publication in

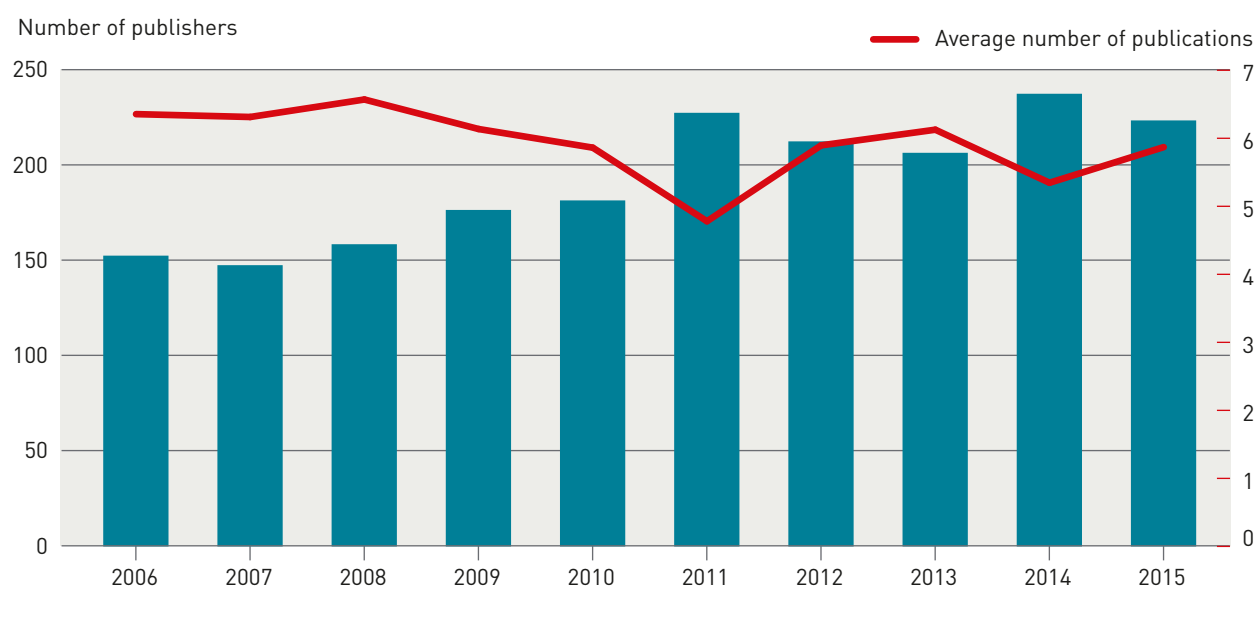
⁵ Publishers are categorised here by the different forms of their names, as used in Danish book classifications. In this way, for example, a differentiation would be made between "Lindhardt & Ringhof" and Lindhardt & Ringhof". This is not viewed as having a noteworthy effect on the figures, but slight differences will be present, especially amongst the most productive publishers.

Fig. 9: Publishers classified by number of publications



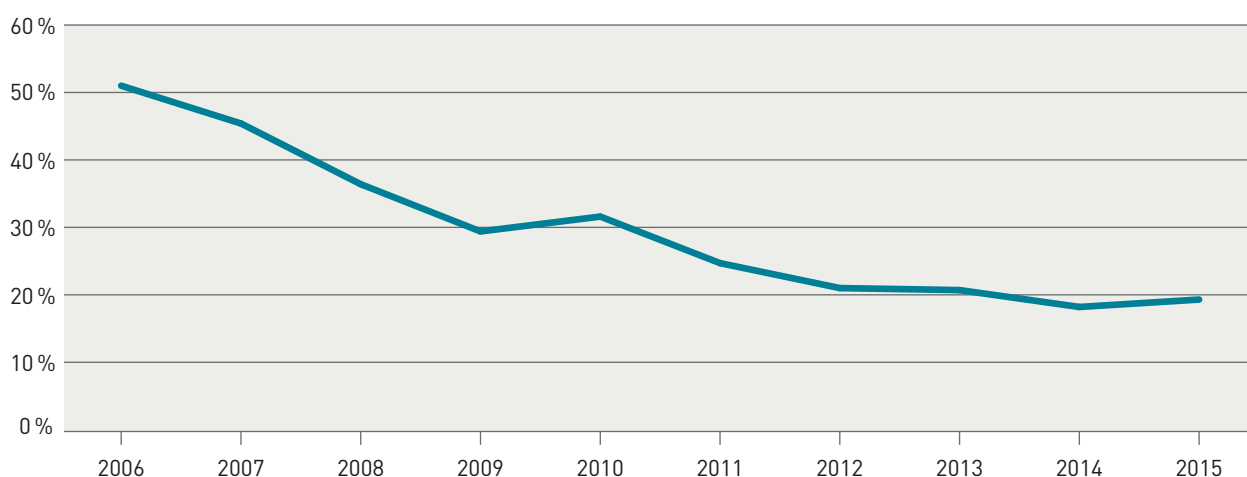
Source: The Danish Library Centre (DBC), extract for Books and Literature Panel

Fig. 10: The number of fiction publishers (first editions) 2006-2015



Source: The Danish Library Centre (DBC), extract for the Books and Literature Panel

Fig. 11: Production share 2006-2015 for the ten biggest publishers of new fiction as of 2006.



Source: The Danish Library Centre (DBC), extract for the Books and Literature Panel.

Denmark and their position in the Danish book market.”⁶

Fig. 12 below shows the ten biggest publishers in 2006 and 2015. In 2006, the ten biggest publishers were responsible for 51 % of all new fiction published that year. If we follow the same ten publishers’ book production up to 2015, we see that their share of total fiction book production has fallen to 19.3 % in 2015 (see **Fig 11**). There are several reasons for this, including the fact that some of the publishers no longer exist as independent publishers (the publisher Borgen was bought out by Gyldendal in 2013 and ceased operations as an independent publisher; the publisher Aller has also stopped publishing books and Aschehoug amalgamated with Lindhardt & Ringhof). There may well be other explanations that cannot be documented statistically.

Despite the fact that the ten biggest publishers in 2006 feature less ten years later, in terms of total production, we know from book production statistics that overall book production has not fallen in these years. If we look at the ten biggest fiction publishers in 2015, their output is 54.5 % of total new fiction production. This shows that a stable and relatively large part of all fiction production continues to be concentrated within a small number of big stakeholders. But big changes are in fact to be

seen within this top ten. As the table in **Fig. 12** shows, both Mellemgaard and Books on Demand (both of whom can be classed as self-publishers/joint publishers) feature amongst the biggest stakeholders in 2015, measured by the number of books produced, and we know that, in global publisher terms, more than 50 % of publishers only publish one title in a given year. Thus, it is reasonable to assume that the self and joint publishers’ share of fiction production is rising generally, but at the same time it has to be stated that the figures show these same types of publisher were also present in 2006.

As sales figures for individual publishers are not available, we cannot, as a starting point, say anything about the market share amongst the biggest publishers. But, as an indicator of how much the publishers mentioned actually feature in the market, we can look at the extent to which newly published fiction titles from 2015 were purchased by the country’s public libraries and teaching/educational learning centres (formerly school libraries). **Fig. 13** shows that titles by the most productive publisher in 2015, Harlequin, did not receive a single purchase request from a public library in the country. Nor do titles from the two self-publishers Mellemgaard and Books on Demand have any kind of noteworthy presence in the libraries. On average, libraries carry 27.8 copies of each 2015 Mellemgaard title on their shelves. The average for Books on Demand is 1.1 copies of each title in the libraries. Politiken publishers are to be found at the top of

⁶ See the study here: <http://slks.dk/bogen-2015/selvudgivere/>

Fig. 12: The ten biggest new fiction publishers in 2006 and 2015 by number of publications

Ten biggest new fiction publishers in 2006	No. first editions 2006	Ten biggest new fiction publishers in 2015	No. first editions 2015
Aller*	154	Harlequin	202
Gyldendal	83	Mellemgaard	103
Aschehoug	54	Gyldendal	93
Drama	43	Lindhardt & Ringhof	44
Lindhardt & Ringhof	41	Books on Demand	38
Borgen	30	Turbine	34
Books on Demand	25	Politiken	31
Tiderne Skifter	22	Tiderne Skifter	27
Hovedland	21	People's Press	24
Cicero	20	Rosinante	23

*Aller publishers are most often associated with weeklies and magazines, but they have also published books. If we look at the type of books Aller published, they are the same kind of titles that are published by Harlequin in 2015.

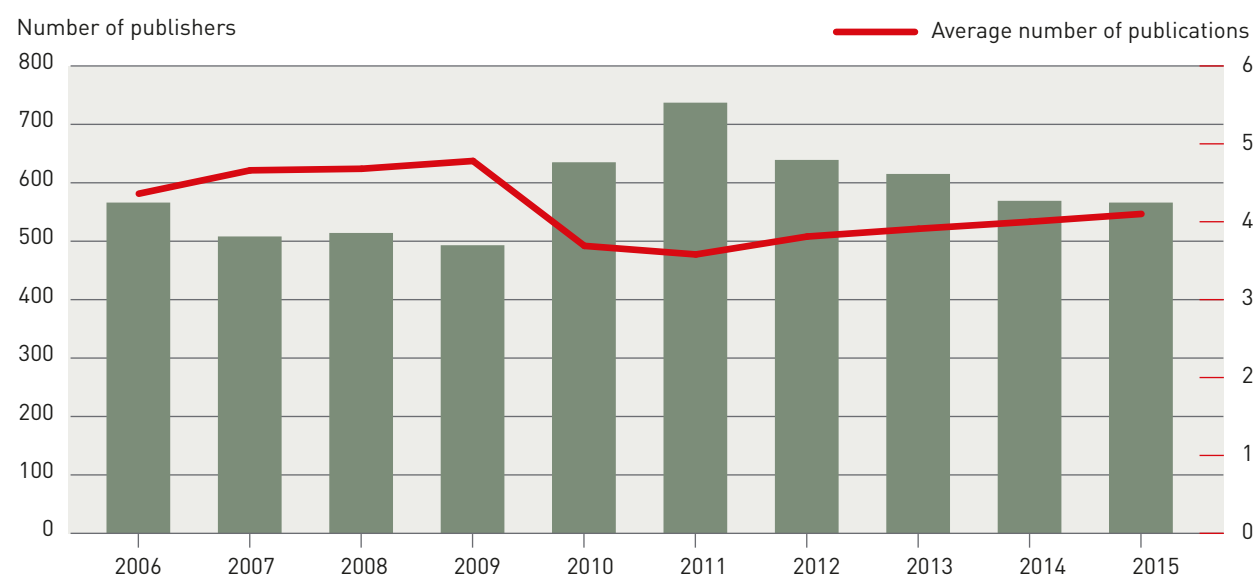
Source: The Danish Library Centre (DBC), extract for the Books and Literature Panel.

Fig. 13: First editions and library stocks for the ten biggest fiction publishers in 2015.

Publisher	No. library copies as of 31.12.2015	No. first editions 2015	Average title stock
Harlequin	0	202	0.0
Mellemgaard	2,249	81	27.8
Gyldendal	26,552	77	344.8
Lindhardt og Ringhof	14,851	43	345.4
Turbine	6,092	34	179.2
Politiken	18,288	31	589.9
Books on Demand	29	27	1.1
Tiderne Skifter	4,266	26	164.1
People's Press	7,129	24	297.0
Rosinante	10,243	21	487.8

Source: The Danish Library Centre (DBC), extract for the Books and Literature Panel and The Danish Agency for Culture

Fig. 14: The number of publishers behind the year's factual literature first editions.



Source: The Danish Library Centre (DBC), extract for the Books and Literature Panel

Fig. 15: Fiction reviews in 2015, as logged by bog.nu site.

Publisher	Number
Harlequin	0
Mellemgaard	0
Gyldendal	687
Lindhardt og Ringhof	277
Turbine	46
Politiken	184
Books on Demand	0
Tiderne Skifter	0*
People'sPress	136
Rosinante	266

Source: Lasse Hjort Madsen, extract from bog.nu.

* 'Tiderne Skifter' was logged by bog.nu as coming under Gyldendal, as Gyldendal bought out this publisher in 2016. Thus, 40 of the reviews noted under Gyldendal in 2015 are actually reviews of titles from 'Tiderne Skifter'.

the table. Their 2015 titles average 589.9 copies on library shelves. Hereafter comes Rosinante with 487.8 copies on average.

The Books and Literature Panel has also gained access to data on the number of fiction book reviews that individual publishers achieved – (Fig. 15) above. In an article in *Weekendavisen*⁷ (written on the basis of data from the 'bog.nu' book awards and reviews website), author and data scientist Lasse Hjort Madsen carried out an analysis of book reviews over the last few years in Denmark's main printed media outlets. From this data, we can see that neither Harlequin, Mellemgaard or Books on Demand got a single book review in the biggest printed media outlets in 2015⁸. All other publishers got reviews in 2015, the majority for Gyldendal (687) and after that Lindhardt & Ringhof (277)⁹.

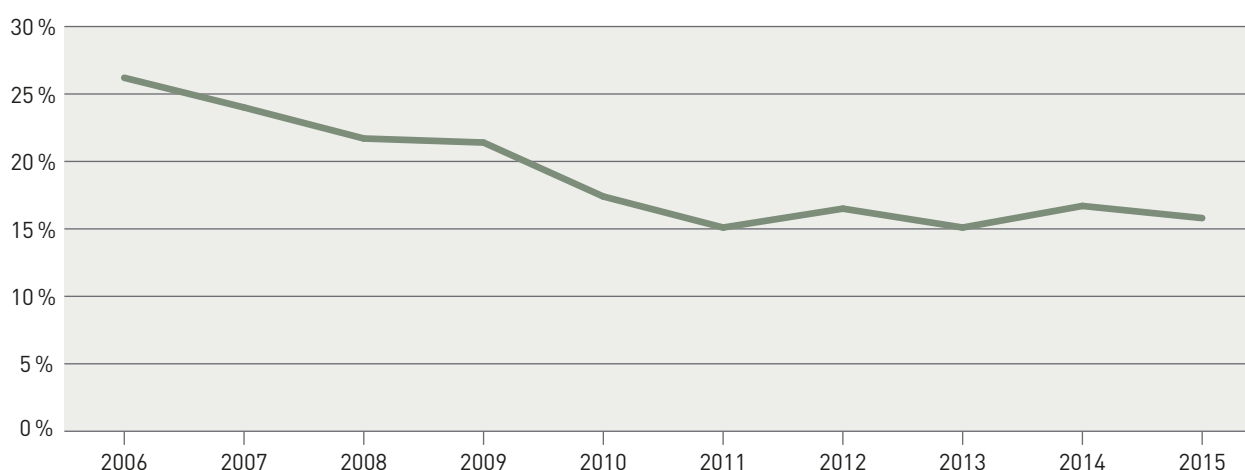
Even though Harlequin, Mellemgaard and Books on Demand are large scale publishers, measured by the number of their fiction titles, their ability to break through the barrier to the public literary arena, understood as access to public libraries and publicity in the daily newspapers, is very limited. In other words, titles from these publishers gain substantially less

⁷ "Danmarks sødeste anmelder" (Denmark's nicest book critic), *Weekendavisen*, 22nd of July, 2016.

⁸ Included are reviews printed in newspapers and weeklies (that is: excluding academic, trade and website media) and only those used in media that feature at least 100 reviews in the period – 2010-2015.

⁹ These reviews can also be titles that were not published in 2015, and also of titles that aren't necessarily first editions.

Fig. 16: Production share 2006-2015 for the ten biggest publishers of new factual literature in 2006



Source: The Danish Library Centre (DBC), extract for the Books and Literature Panel

Fig. 17: The big ten publishers of new factual literature in 2006 and 2015

The big ten publishers of new factual literature in 2006	No. first editions 2006	The big ten publishers of new factual literature in 2015	No. first editions 2015
Gyldendal	154	Turbine	137
Aschehoug	143	Gyldendal	130
Politiken	56	Books on Demand	72
Borgen	51	Hans Reitzel	65
Jurist- og Økonomforbundet	48	Politiken	50
Børsen	47	Lindhardt og Ringhof	49
Hans Reitzel	40	Mellemgaard	48
Schultz	38	Jurist- og Økonomforbundet	46
Lindhardt og Ringhof	35	Aarhus Universitetsforlag	36
Libris	35	People'sPress	36

Source: The Danish Library Centre (DBC), extract for the Books and Literature Panel

public exposure amongst Danish book purchasers and public library users than is the case for the more traditional and well known publishers.

2.2 PUBLISHERS' PRODUCTION OF FACTUAL LITERATURE FOR ADULTS – 2006-2015

The production scenario for factual literature is marked by far greater stability than the corresponding scenario for fiction. There were 565 publishers of factual literature, as first editions, in both 2006 and 2015. The greatest number

comes in 2011, with 736, the smallest in 2009, with 492.

The ten biggest publishers' share of overall factual book production in 2006 is just under the amount for fiction (Fig 16). In 2006, the big ten published 26.2 % of all first edition factual literature for adults. If we look at the same publishers' share of production in 2015, the rate of fall is nowhere near as significant as was the case for fiction. We see that in 2015, the big ten publishers from 2006 publish 15.8 % of the overall figure for new factual literature, and that the level has been stable since 2011.

Fig. 18: First editions and library stock for the ten biggest factual literature publishers in 2015

Publisher	ANo. library copies as of. 31.12.2015 (new titles from 2015)	No. first editions 2015	Average title stock
Turbine	15,172	137	110.7
Gyldendal	13,444	130	103.4
Books on Demand	601	72	8.3
Hans Reitzel	3,897	65	60.0
Politiken	10,269	50	205.4
Lindhardt og Ringhof	5,788	49	118.1
Mellemgaard	1,711	48	35.6
Jurist- og Økonomforbundet	995	46	21.6
People'sPress	6,498	36	180.5
Aarhus Universitetsforlag	1,741	36	48.4

Source: The Danish Library Centre, extract for the Books and Literature Panel and the Danish Agency for Culture.

Thus, changes at the top and the fall in production share amongst the big ten publishers from 2006 onwards have been nowhere as big as that for fiction, and factual literature is not, to anywhere near the same degree, concentrated around a small number of prolific publishers.

This is also shown by the average number of publications – between three and five publications per publisher – Fig. 15. On the basis of this evidence, it appears that the factual literature market is characterised by much greater stability than that of fiction.

In general terms, public library stock holdings of titles from the biggest publishers of factual books (Fig. 18) show that far fewer copies of factual books are bought compared to fiction, as the average stock figure per title is generally lower. Once again, it is Books on Demand and Mellemgaard who on average have fewer copies on library shelves, but it must also be noted that the average library stock holding for both publishers is higher for factual literature than it is for fiction. This suggests that it's easier for self and joint publishers to secure library purchases if they are publishing factual books. Politiken's 2015 titles are the ones that, on average, are most often purchased, followed by titles from Peoples Press.

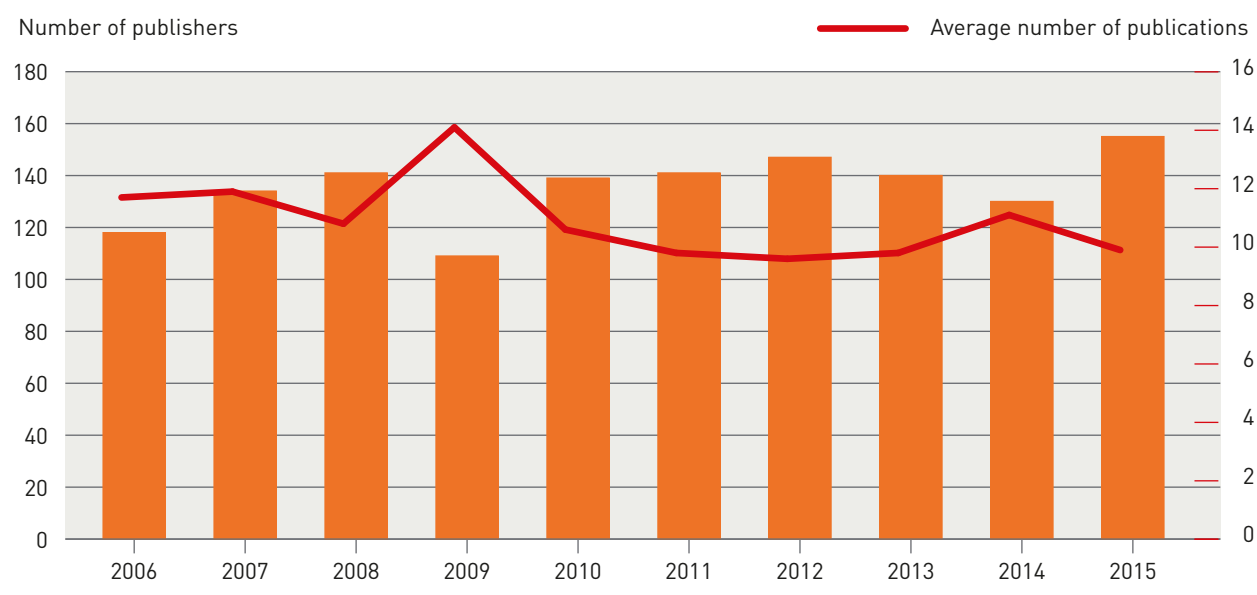
2.3 PUBLISHERS' PRODUCTION OF CHILDREN AND YOUNG PEOPLE BOOKS – 2006-2015

The number of publishers of literature for Children and Young People fluctuates through the ten years being examined here (Fig 19). From 2006 to 2008, and then from 2010 to 2012, the number of publishers can be seen to grow. 2015 gives us the greatest number of publishers for the whole period; namely 155.

In 2006, the big ten publishing houses published 65.5 % of the year's titles. By 2015, publishing share for the same publishers had dropped to 32.9 %, and with this the category is characterised by a changeability similar to the fiction category. The average number of publications per publisher is high, which suggests that the publishing of Children and Young People is marked, to an even greater degree, by a small number of stakeholders. Furthermore, there are no self or joint publishers amongst the big ten publishers of Children and Young People in the whole period 2006-2015.

Public library stock holdings of the big ten publishers of new Children and Young People books from 2015 show that the gap between top and bottom is not so great when viewed as the average number of copies held per title. Lamberth is the top ten publisher that has fewest copies with 122.3 on average, and then comes

Fig. 19: The number of publishers behind the year's Children and Young People first editions



Source: The Danish Library Centre (DBC), extract for the Books and Literature Panel.

Fig. 20: The big ten publishers of new Children and Young People literature

The big ten publishers of new Children and Young People literature in 2006	No. first editions 2006	The big ten publishers of new Children and Young People literature in 2015	No. first editions 2015
Carlsen	244	Turbine	263
Flachs	148	Carlsen	145
Sesam	129	Lamberth	128
Gyldendal	106	Gyldendal	124
Egmont Serieforlaget	90	Flachs	102
Klematis	63	Alvilda	79
Høst	34	Klematis	69
Politiken	33	Høst	55
Borgen	31	Tellerup	44
Forum	28	Jensen & Dalgaard	30

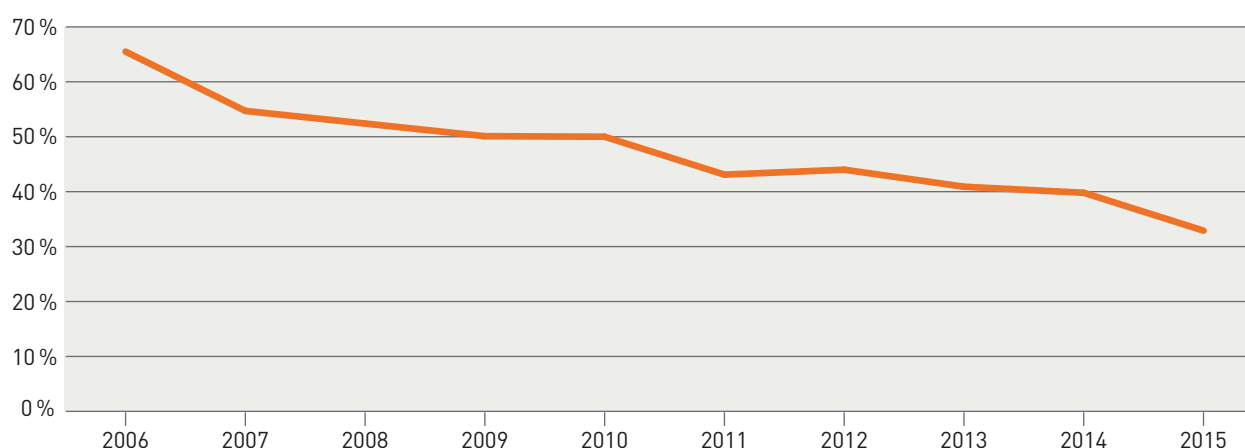
Source: The Danish Library Centre DBC), extract for the Books and Literature Panel.

Turbine with an average of 153.2 copies. At the top we see Gyldendal with 379 copies on average and then Høst with 346.4. This data indicates that public libraries underpin the above mentioned tendency whereby the production of Children and Young People literature is to a higher degree dominated by traditional publishing stakeholders than is the case for factual and fiction works.

2.4 PRODUCTION TRENDS FOR NEW LITERATURE IN THE TWO BIGGEST PUBLISHING CONCERNS

In the following, and In order to widen the book production picture still further, the panel looked more closely at the country's two biggest publishers – Gyldendal and Lindhardt & Ringhof. From this, we can see that these two publishers have featured at the top of all statistical tables,

Fig. 21: Production share 2006-2015 for the ten biggest publishers of Children and Young People 2006



Source: The Danish Library Centre, extract for the Books and Literature Panel.

Fig. 22: First editions and library stock for the ten biggest Children and Young Adults publishers in 2015

Publisher	No. library copies as of. 31.12.2015 (new titles from 2015)	No. first editions 2015	Average title stock
Turbine	40,304	263	153.2
Carlsen	38,956	145	268.7
Lamberth	15,650	128	122.3
Gyldendal	46,997	124	379.0
Flachs	24,431	102	239.5
Alvilda	18,529	79	234.5
Klematis	13,010	69	188.6
Høst	19,051	55	346.4
Tellerup	7,340	44	166.8
Jensen & Dalgaard	4,824	30	160.8

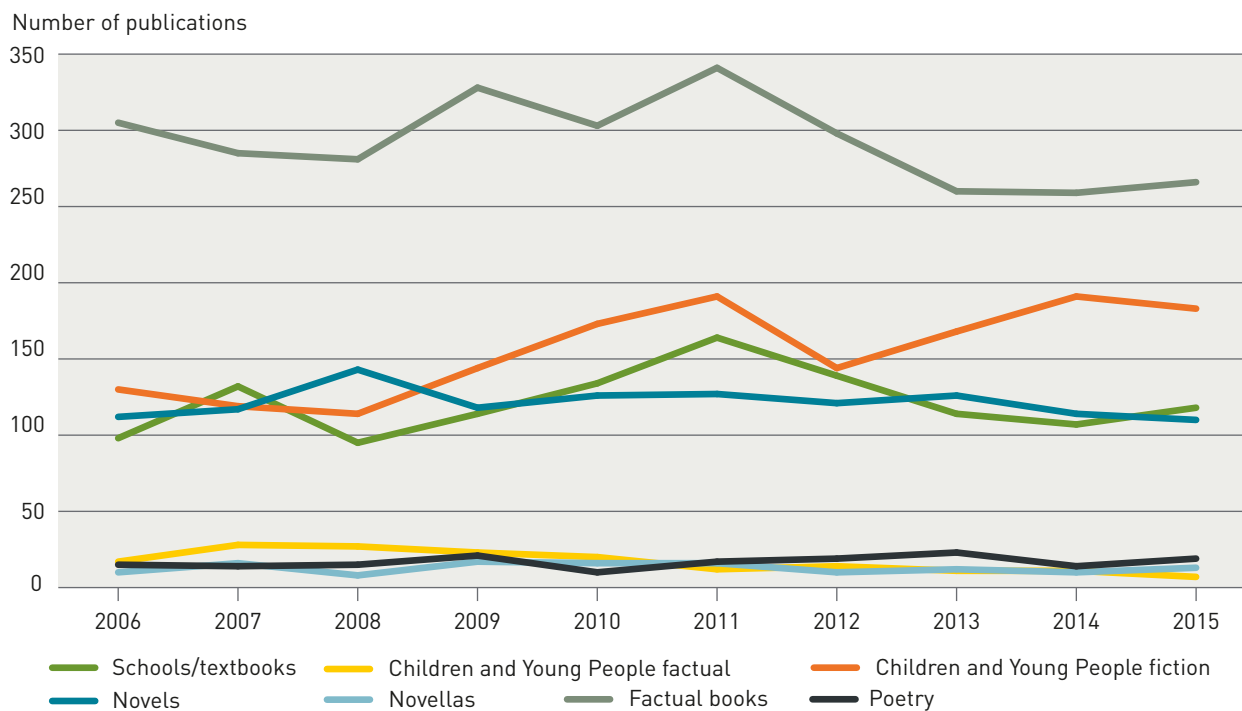
Source: The Danish Library Centre, extracts for the Books and Literature Panel and The Danish Agency for Culture.

reproduced here, and that it is precisely these two publishers with their respective longstanding publishing traditions that have come to be a permanent fixture in the Danish literary system. Both publishers can boast a record of having launched many widely publicised and agenda setting titles into the world. In other words, when seeking to understand the present status of books and literature and conditions for publishing books in Denmark, we are naturally obliged to listen to what these publishers

in particular have to say. The Books and Literature Panel, therefore, saw the need to look more closely at production trends for new literature within Gyldendal and Lindhardt & Ringhof.

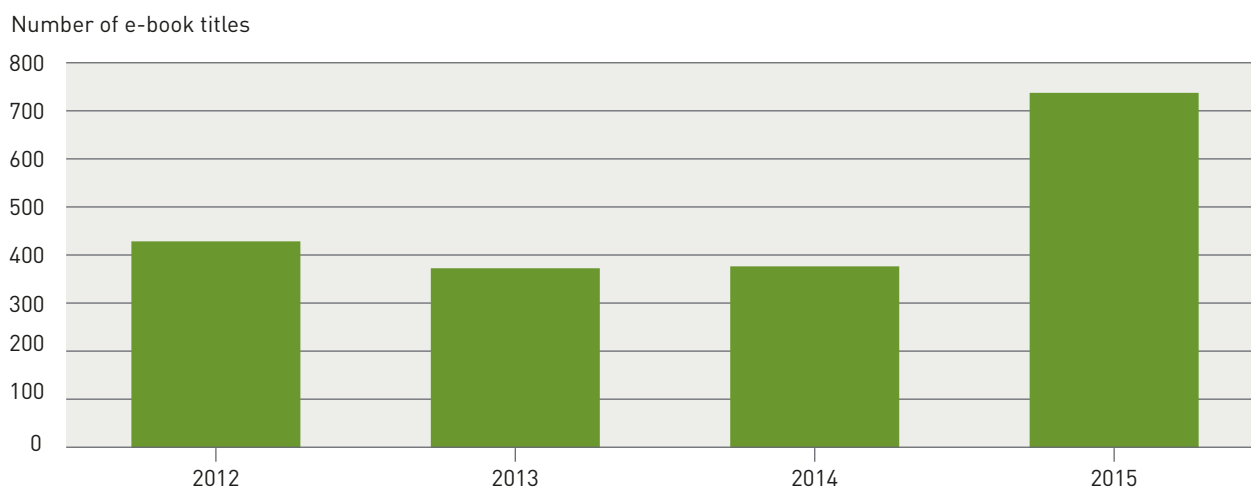
Where Gyldendal is concerned, one of the main aspects of the printed element of their production is a rise in the production of Children and Young People fiction; this is in a period affected by both a financial crisis and the liberalising of the books market. The number of Children and Young People titles has risen by

Fig. 23: Gyldendal as a publishing concern (1st editions.)



Source: The Danish Library Centre (DBC), extract for the Books and Literature Panel.

Fig. 24: E-books by Gyldendal



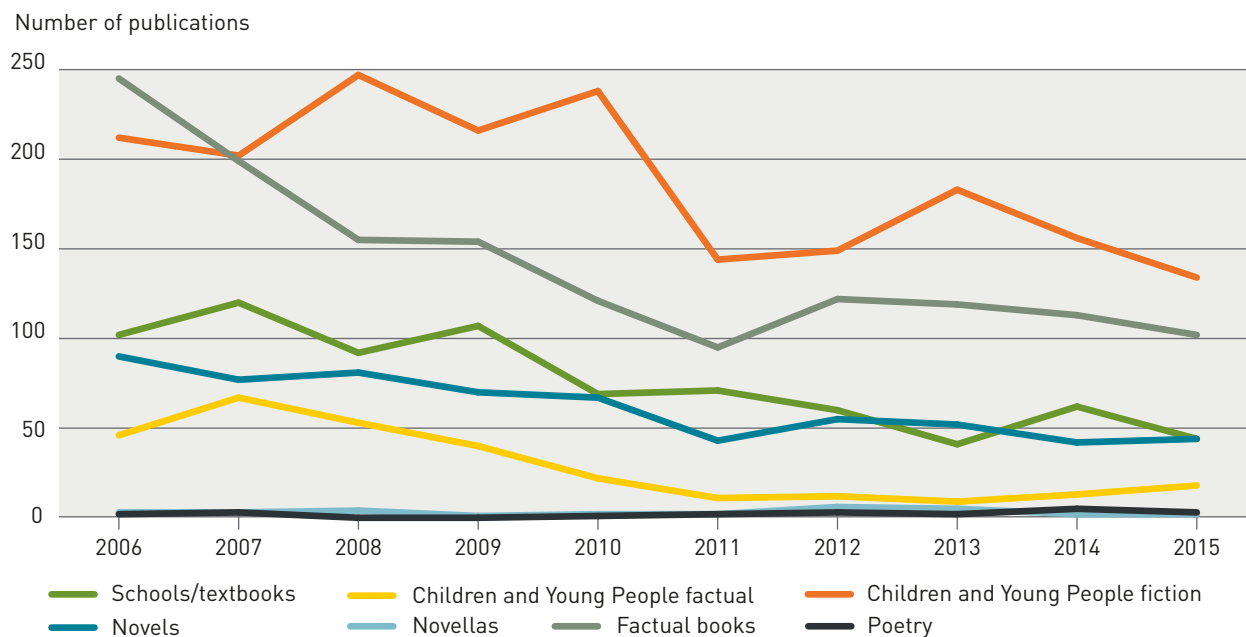
Source: The Danish Library Centre (DBC), extract for the Books and Literature Panel.

approx. 41 % since 2006. The number of novels fluctuates slightly in the period, but at no point is below 100 titles, or over 150. Production of factual literature, on the other hand, is seen to have fallen and represents approx. 87 % of the 2006 level. The number of schools and educational books also fluctuates slightly through the period, and for this category, and then both fiction for Children and Young People and novels for adults, the number of publications was highest in 2011. Novellas and poetry are not

produced in great numbers but the level looks to be fairly stable. An important part of this wider picture is that, in the period 2006 – 2015, Gyldendal bought out several other publishers, which is a contributory factor to its increase in production.

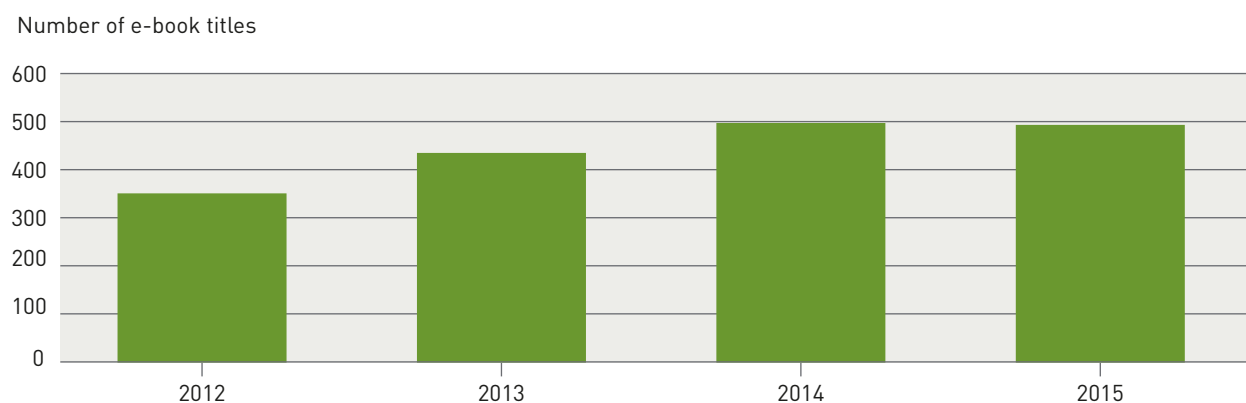
If we look at e-books, we see that Gyldendal's production quota has nearly doubled from 2014 to 2015, and for the other three years covered by the figures the annual level lies between 371 and 427 publications.

Fig. 25: Lindhardt & Ringhof as a publishing concern (1st editions.)



Source: The Danish Library Centre (DBC), extract for the Books and Literature Panel.

Fig. 26: E-books by Lindhardt & Ringhof



Source: The Danish Library Centre (DBC), extract for the Books and Literature Panel.

The picture is different for the Lindhardt & Ringhof publishing concern. All genres (with the exception of poetry) lie at a lower level than in 2006, and this decline measures between 40 and 60 % for the various genres. However it appears that the fall in production eases off somewhat after 2011. A big part of the reason that the level for factual books and novels is so high in 2006 is due to the publishing of a large number of titles by Aschehoug publishers. Aschehoug and Lindhardt & Ringhof amalgamated in 2007 at

which point Aschehoug ceased operating as an independent publisher.

In the two final years, the number of e-books by Lindhardt & Ringhof has come in at approx. 500 titles per year. Thus, we see a decent increase since 2012, when the number was 351. Lindhardt & Ringhof have previously announced a very ambitious digitisation strategy for the years ahead, but the potentially big impact of this is not yet reflected in the statistics.

3.

DISTRIBUTION OF BOOKS – PUBLISHERS AND BOOKSHOPS

It has become more difficult for traditional publishers to make money from publishing fiction. But turnover for publishers in the digital market is rising. Online audiobooks and digital educational material are the seedbeds for this growth, whereas e-books have shown a decline. Sales of books via physical bookshops are in decline, whilst the share of overall book purchases for internet booksellers and supermarkets is rising.

Main points in this chapter:

- Fiction literature's share of publisher turnover has fallen from 29.7 % in 2013 to 26.9 % in 2015
- The teaching books share of overall publisher turnover has risen from 30 % to 36 %
- Digital turnover for publishers has grown from 14.4 % in 2014 to 18 % in 2015
- In 2015, 49 % of book purchasers bought their most recent book in bookshops, as against 65 % in 2000
- The share of people buying their most recent book on the internet has risen from 3 % in 2000 to 25 % in 2015
- The share of people buying their most recent book in a supermarket was 4 % in 2000 and 13 % in 2015

3.1 DANISH PUBLISHER BOOK SALES

The Danish Publishers association's 2015 annual statistics report¹⁰ contains for the most part only figures for 2015, for which reason it's not possible to make comparisons, across various parameters, with the status quo ante. The association advises that the prior system of

reporting from publishers has been changed and it, therefore, cannot vouch for the figures from 2015¹¹. Thus, not much can be said regarding turnover trends in the publishing sector, nor how much different genre and formats feature in publishing turnover across a period of time. For the same reason, it's difficult to use the statistics presented by Danish Publishers from a cultural and literary-political perspective as an indicator of the book sector's overall status.

Until this year, the annual statistics report contained figures for the previous two years; though because of ongoing adjustments in reporting methodology etc., it has never been possible to compare figures across a greater number of years – an issue the Books and Literature Panel raised in last year's report. Thus, with this most recent annual statistics report from Danish Publishers, it is only possible to give a snapshot of the situation in 2015.

3.1.1 Sales and turnover – printed and digital books

In spite of the fact that Danish Publishers can only vouch for sector figures from 2015, due to the change in reporting practices, the association does in fact issue figures for publisher turnover, broken down by printed and digital sales for 2014 and 2015, as well as the distribution figures within the digital turnover category. Here we can see that digital turnover share is rising and has grown from 14.4 % of publisher turnover in 2014 to 18 % of publisher turnover in 2015.

¹⁰ Every year, Danish Publishers, (prev. the Publishers Association) issues an annual statistics report covering publisher sales of books, including turnover figures for the sector, book sale numbers and digital sales. Danish Publishers estimate that these statistics cover at least 85% of the book market, and therefore include publishers that aren't part of the association.

¹¹ Danish Publishers write: "In 2015, the statistics are published without comparative figures from 2014. This is due to a certain amount of uncertainty in the figures, as the method of reporting has been changed for 2015 (onwards).

Fig. 27: Publishers turnover by printed and digital sales 2014 and 2015

	2014	2015	Trend
Printed sales	DKK 1.550,9 mill.	DKK 1.388,9 mill.	- 10.4 %
Digital sales	DKK 258 mill.	DKK 305,2 mill.	+18,3 %

Source: Danish Publishers 2015 Annual Statistics Report.

3.1.2 Publishers' digital turnover by e-book, audiobook and other digital sales

Digital audiobooks have now surpassed the e-book share of digital turnover. E-books go from 20.5 % in 2014 to 15.7 % in 2015, whereas online audiobooks grow from 14.9 % to 16.3 %. The 'other digital sales' category mainly covers digital educational material (e.g. learning portals and i-books) for schools and high schools and now makes up 68 % of digital turnover, as against 64.6 % in 2014.

Fig 28: Publishers' digital turnover by e-book, audiobook and other digital sales – 2014 and 2015

	2014	2015	Trend
E-books	DKK 53.1 mill.	DKK 48.0 mill.	-9,6 %
Online audio-books	DKK 38.3 mill.	DKK 49.8 mill.	+23,1 %
Other digital sales	DKK 167.0 mill.	DKK 207.4 mill.	+24,2 %

Source: Danish Publishers 2015 Annual Statistics Report.

The high share shown by digital educational material should be seen in the light of the current, and largescale, public funds investment in the development of digital educational material¹². Where the progress of online audiobooks and the re-gress of e-books is concerned, the possible explanations are more complicated.

On the one hand, it is more than clear that turnover in the online audiobook market is driven by the general boom in demand for audio-books. This is nowhere more clearly shown than in the rise in the lending of online audiobooks, which can be registered in the eReolen system's statistics (p. 10). On the other hand, it's

possible to see the decline in e-book turnover as part of a general international trend, in which e-book share of the books market currently shows a certain stagnation¹³. One thing worth noting vis-à-vis the decline in e-book turnover is that a range of big publishers have announced ambitious digitising plans in recent years. Thus, Gyldendal in June 2016 announced that within two years they will have digitised up to 15,000 titles. Likewise, in 2015, the country's second biggest publisher, Lindhardt & Ringhof, announced plans to digitise 15,000 titles within the next two years. People's Press publishers, meanwhile, are also making digital plans, with a target of doubling the digital end of their book turnover, from less than 10 % in 2015 to 15-20 % in 2016.

On one side, we see that many e-books are being published (see Fig. 6, p. 16), just as the reading of e-books is gaining ground (see more on this regard on p. 52), but the other side of this coin is that we can see the commercial market for publishers' e-books is shrinking somewhat. And this in turn suggests that it's seriously difficult for the traditional stakeholders to make publishing e-books profitable – at least in the short term. In the book publishing long term, e-books are of vital strategic importance to publishers, partly because of issues such as the handling and development of those titles to which publishers own rights.

3.1.3 Turnover by trade-market and educational material for the teaching sector

More than a third of publisher turnover comes from sales of educational material to the teaching sector¹⁴, and educational material is a growing part of publisher turnover.

Fig. 29: Turnover by trade-market and educational material for the teaching sector

	2013	2014	2015
Trade	70 %	69 %	64 %
Educational material	30 %	31 %	36 %

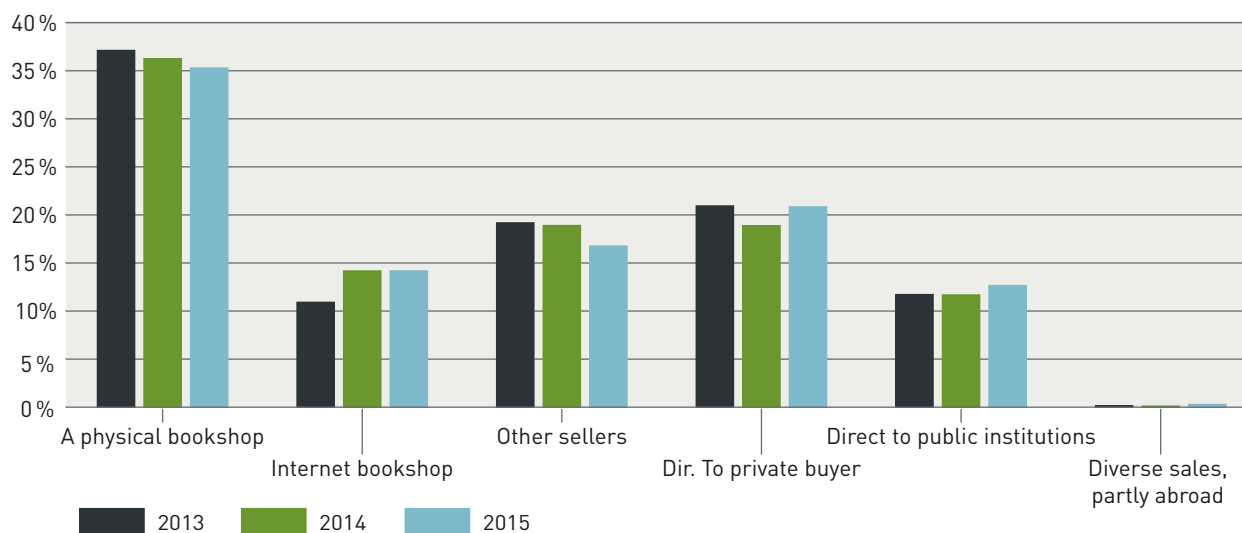
Source: Danish Publishers 2015 and 2014 Annual Statistics Report.

¹² In the period between 2012-2017, the state will invest DKK 500 mill towards increasing the use of IT in state schools and local authorities have committed to a similar investment.

¹³ See Rüdiger Wischenbart: *Global E-book report 2016*

¹⁴ Even though, according to Danish Publishers, it's not possible to compare turnover figures over a period of time, it is possible to compare the internal genre classifications within the individual year's turnover.

Fig. 30: Turnover for fiction by transaction point



Source: Danish Publishers 2015 Annual Statistics Report.

Major changes are taking place within the educational materials sector in these years. Today, the traditional printed textbook that's purchased as a set for pupils in a class, is often supplemented, or even replaced, by learning portals that are sold via a subscription arrangement.

These learning portals, in which certain amounts of text and other knowledge resources can be accessed, not only impact on the way publishers sell books, but also the way educational material is developed and, in this latter regard, publishers are to an increasing extent making use of contributions from several different authors and other content providers, instead of single authors, as they interact with and develop their responses to the educational universe.

It is the fiction and factual literature categories that have seen a fall off within the trade-market, whereas the share for Children and Young people's books is largely unchanged; educational material is, as indicated, a growing trend¹⁵.

¹⁵ The Danish Publishers advise in their 2015 annual report that the published figures from 2015 cannot be retrospectively compared. The fact that, despite this, we show three years is because we are computing the percentage value for the different genres and sales channels' share of turnover. Thus we are not comparing turnover figures directly year by year.

Fig. 31: Turnover by genres

	2013	2014	2015
Fiction	29.7 %	29.5 %	26.9 %
Factual Literature	29.1 %	28.5 %	24.9 %
Children and Young people's books	11.2 %	10.9 %	12.1 %
Educational material	30.0 %	31.1 %	36.2 %

Source: Danish Publishers 2015 and 2014 Annual Statistics Report.

Thus, whilst production of fiction first editions is making progress, as we saw on [page 13](#) in [Fig. 2](#), when we look at the sector as a whole, general turnover for the same genre is declining. This supports the tendency described above regarding the emergence of an increasingly varied range of stakeholders in the publishing arena, including self-publishers and small publishers, who do not necessarily prioritise commercial success when publishing books. Moreover, this trend has emerged at the same time as it seems to have become more difficult for the traditional publishing stakeholders to earn money on the publishing of fiction.

3.1.5 Turnover by sales channel

If we look at how much the various sales channels feature, in percentage terms, within the separate publishing sales genres, the physical bookshop represents a significant sales chan-

Fig. 32: Turnover for factual literature by transaction point

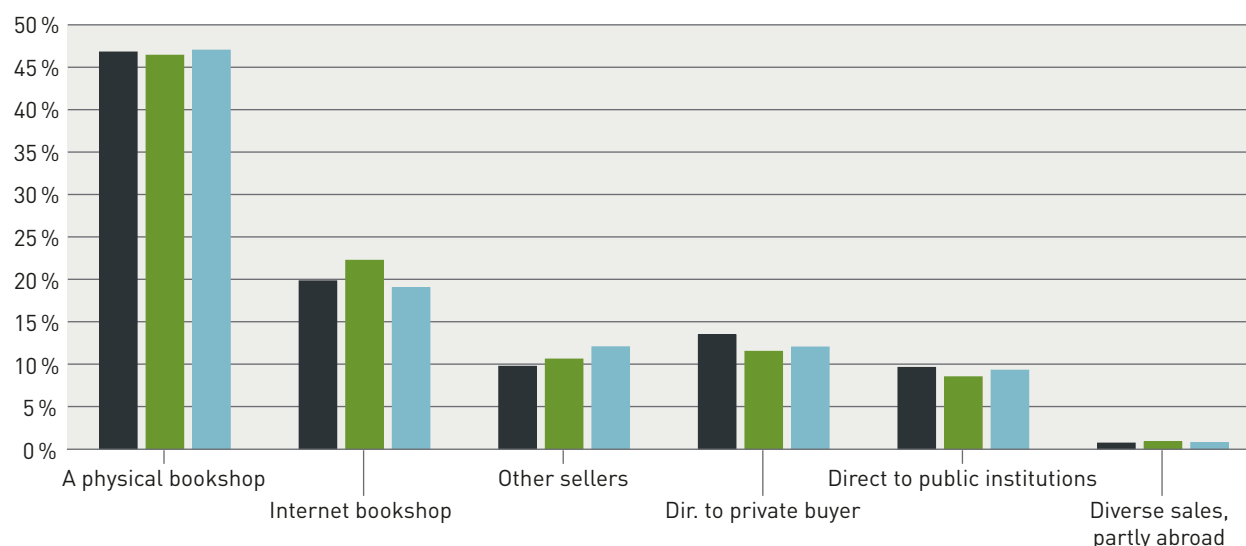


Fig. 33: Turnover for Children and Young People books by transaction point

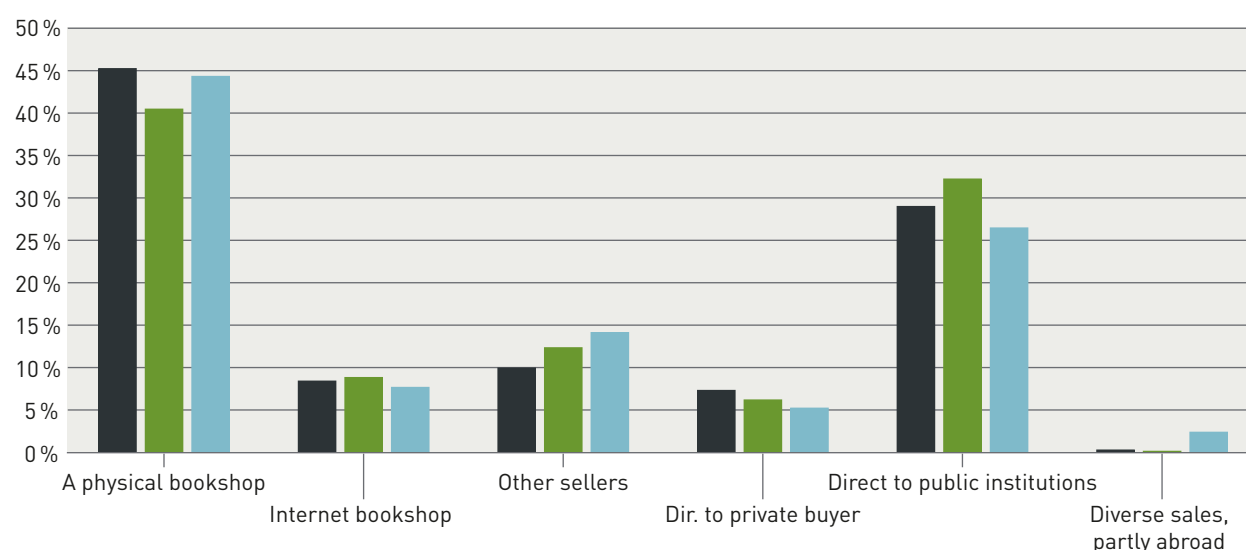
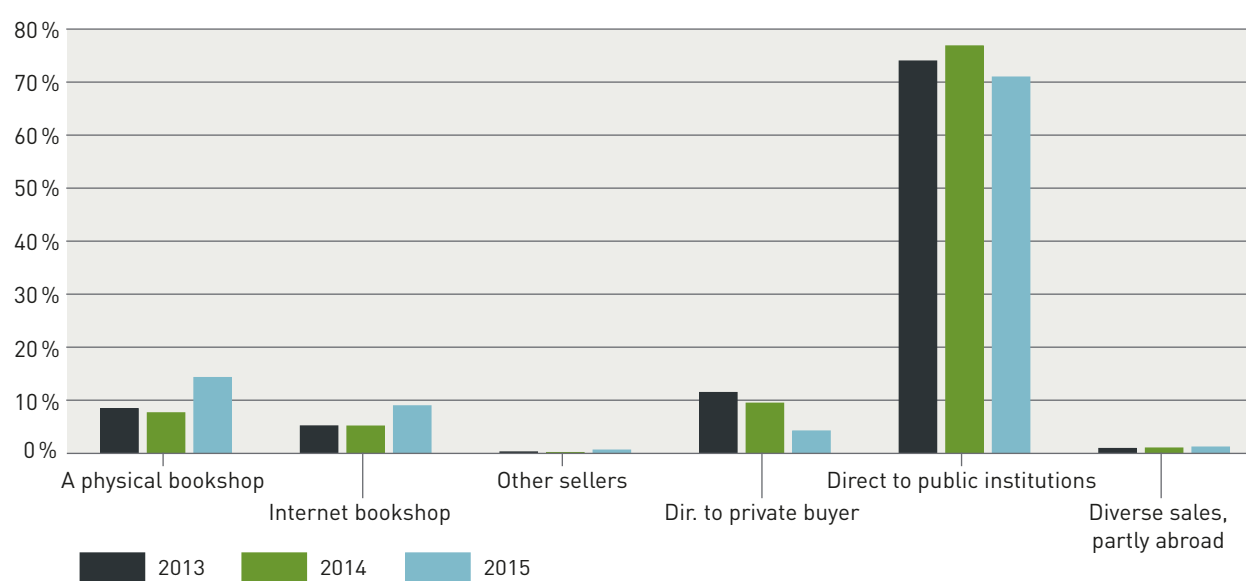
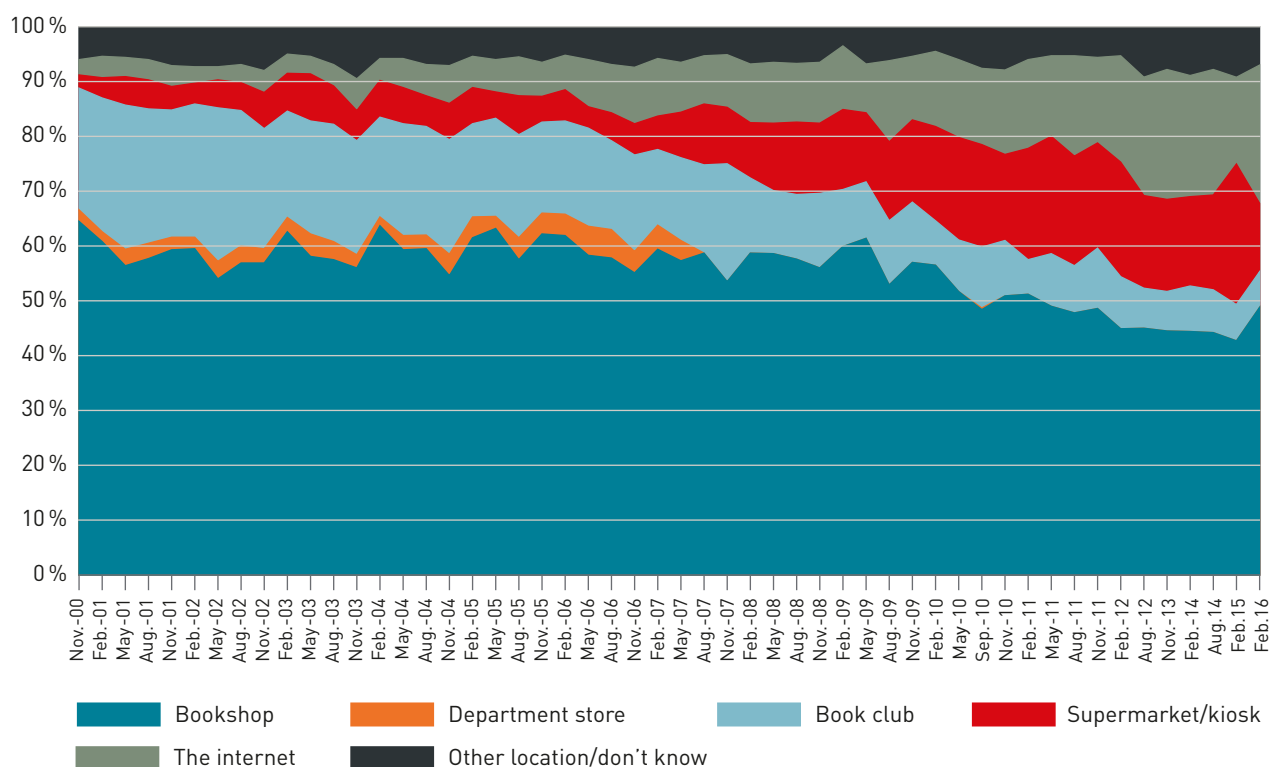


Fig. 34: Turnover for school and educational books by transaction location



Source: Danish Publishers 2015 Annual Statistics Report.

Fig. 35: Sales agent for most recent book purchase



Source: Danskernes bogkøb. [Book purchasing habits amongst Danes.]

nel. In spite of a slightly downwards trend, the physical bookshop is still the most widespread sales channel, with a 35 % turnover for fiction (Fig. 30). In this context, it is worth noting, that direct sales to the reader/purchaser covered by sales via book clubs, and sales via the publisher's website, accounted for just under 21 % of fiction sales in 2015.

Where factual literature is concerned, the physical bookshop is in an even stronger position than with fiction, showing a stable turnover share of 47 % and a correspondingly strong figure for Children and Young People books that has a share in 2015 of just over 44 % (Fig. 32).

For books in the Children and Young People category, direct sales by publishers to public institutions, i.e. schools and public libraries, constitute slightly more than a quarter of the distribution across sales channels (Fig. 33).

The sales channel picture for schools and educational books is markedly different to that of the other genres. Here, direct sales to public institutions are the predominant sales channel, which includes direct sales of teaching material to primary and high schools.

3.2 DANISH BOOK PURCHASING HABITS

Book purchasing habits amongst Danes have been studied (with certain slight adjustments along the way) on an ongoing basis by the Danish Booksellers Association since the turn of this century; though the frequency of these studies has fallen off through time, from being a quarterly assessment to the annual account we have today. The association's survey involves asking 1,200 respondents about their book purchase and reading habits, and the focus is both on Danish and English language books.

Fewer and fewer people in the last 15 years or thereabouts have made their most recent book purchase in physical bookshops or through a book club. In contrast, the share of book purchases made on the internet or in a supermarket/kiosk is rising by similar margins. However within this overall scenario it should be noted that the latest study in February 2016 showed marked fluctuations for purchases in bookshops, supermarkets and on the internet.

Apart from some fluctuations, which presumably can be ascribed to statistical uncertainty, the graph for this study of Danish reading habits, involving 1,200 respondents, shows a decent level of stability. However, the percentage

Fig. 36: Number of Danish language books read in the previous year

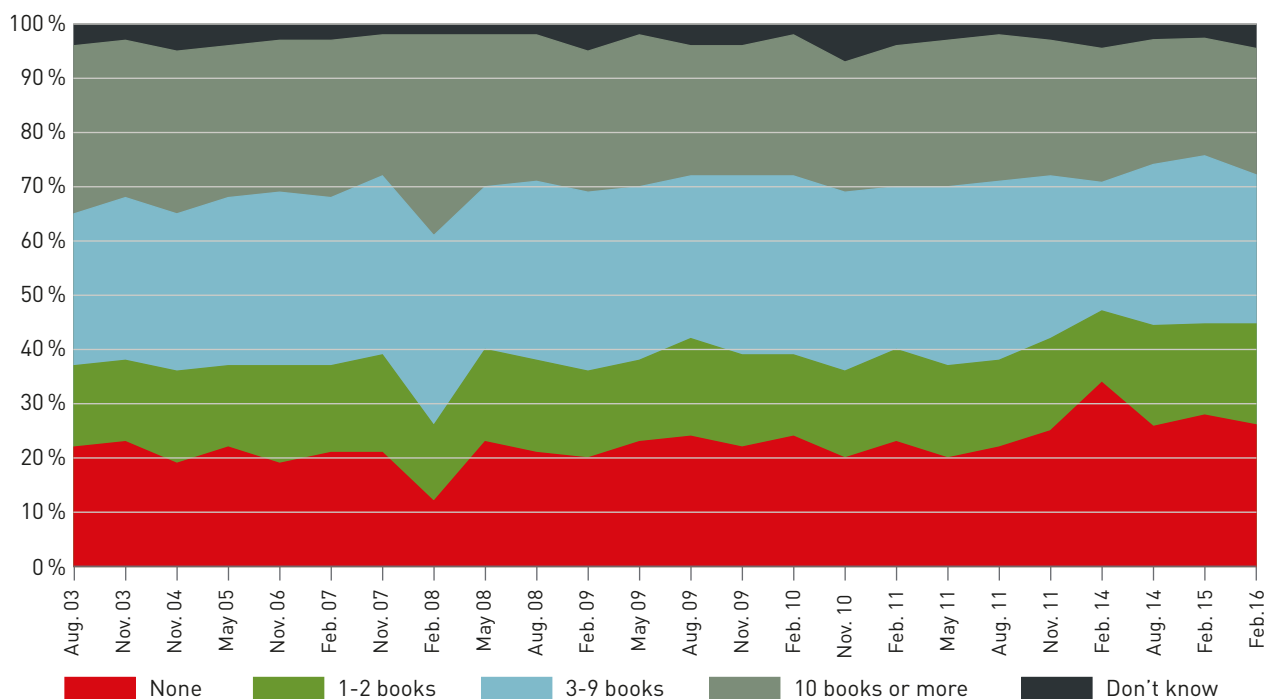
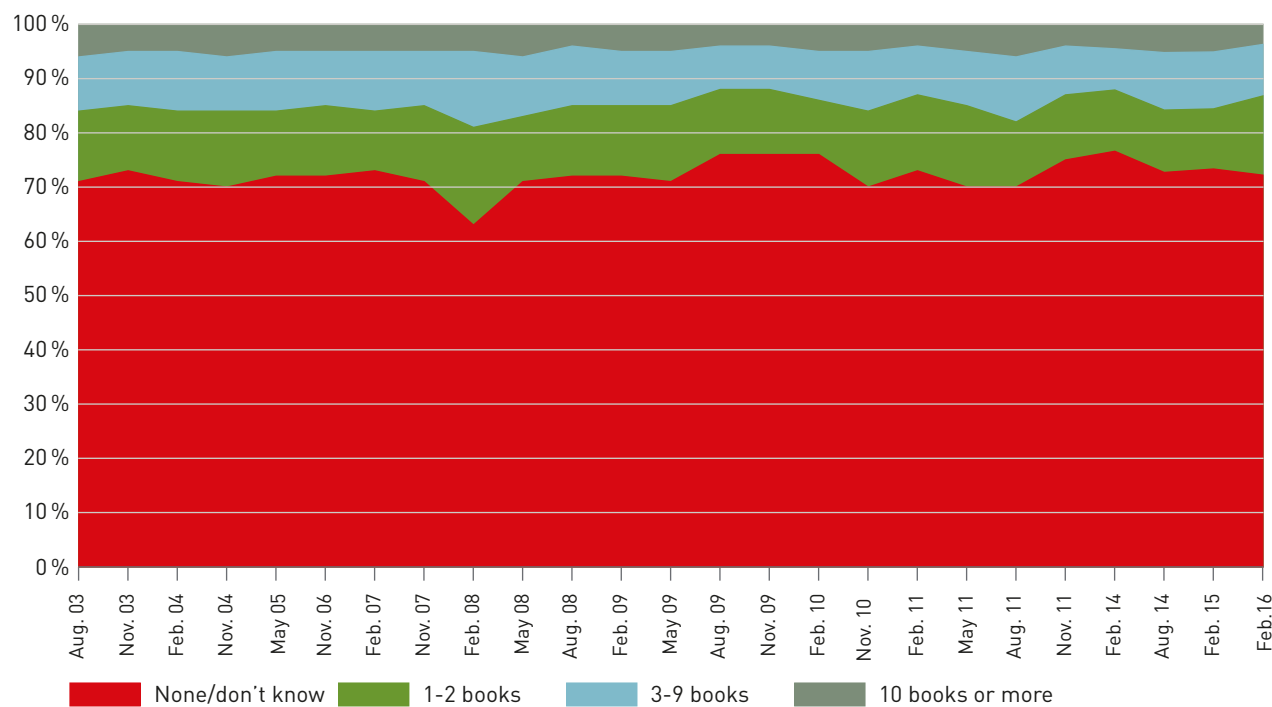


Fig. 37: Number of English language books read in the previous year.



Source: Danish Booksellers Association.

share of people reading more than 10 books per year has fallen slightly throughout the period, and the share of people who haven't read a single Danish language book in the period has risen slightly. In other words, overall and despite changes in their purchasing habits, Danish reading habits are characterised by stability.

The share of respondents who never read books in English, is high, and in the given period is around 70 %, though slightly higher in the latter part of the period. Thus, we see that approx. 30 % of those asked have read one or more books in English in the previous year.

4.

DISTRIBUTION OF BOOKS AND LITERATURE – PUBLIC LIBRARIES

The lending of physical books from public libraries is declining, but overall the range of titles on offer is slightly larger in public libraries today than four years ago. However, fewer copies of each title are made available. The eReolen lending system, meanwhile, has seen a decline in the lending of e-books from the first six months of 2015 to the first six months of 2016, whilst the lending of online audiobooks continues to rise.

Main points in this chapter:

- Public library stock holdings of books has fallen from 27.6 mill. books in 2000 to 15.3 mill. in 2015.
- The book stocks trend in all the Nordic countries in these years is downwards, but this phenomenon is happening much more quickly in Denmark than the other Nordic countries.
- Even though almost 40,000 titles have completely disappeared from public libraries in the same period, ongoing book purchases mean that the number of titles on offer has actually risen by 1,052 since 2012.
- In percentage terms, the decline in the lending of physical books is greatest in Sweden with 25.5 %. Then comes Denmark, Finland and Norway.
- eReolen lending of e-books has fallen from 537,000 in the first six months of 2015 to 517,000 in the first six months of 2016
- eReolen lending of online audiobooks has risen from 584,000 in the first six months of 2015 to 766,000 in the first six months of 2016.

- With regard to physical books and audiobooks, e-books and online audiobooks, more copies were lent vis-à-vis sold copies in 2015 than was the case in 2014.

In those areas where the Books and Literature Panel studies the public library sector, it is this sector's role as a provider of literature and books that is central for us. The most important figures here are those that shed light on book stock holdings and the lending of literature. However, it is a given, that the overall economic and structural conditions that pertain for public libraries form the basis on which libraries buy in and distribute literature.

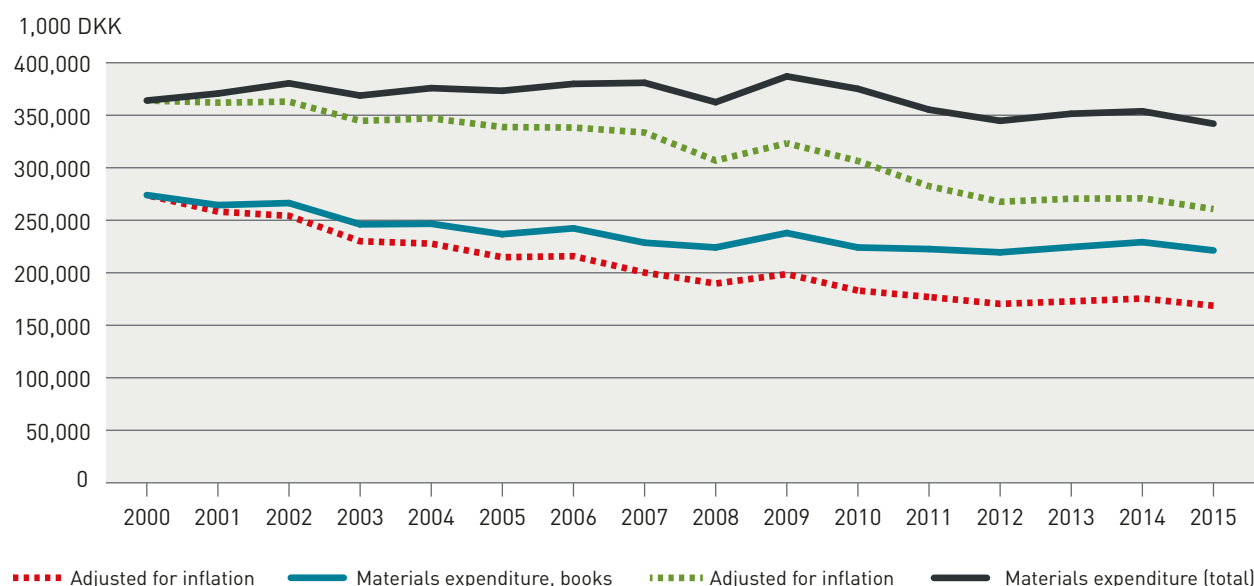
Public library costs for the general purchasing of materials are falling (see [Fig. 38](#) below). In the latter years, that part of materials expenditure that relates exclusively to books does appear to maintain a stable level, but then if we adjust for inflation, we see that material costs for books has actually fallen by approx. 15 % since 2009.

From 2009 to 2015, the number of public library branches has fallen by 13.6 %, centering on two large drops in 2009 to 2010 and then 2014 to 2015 (see [Fig. 39](#)).

4.1 THE RELATIONSHIP BETWEEN PUBLIC LIBRARY BOOK STOCKS AND THE NUMBER OF TITLES

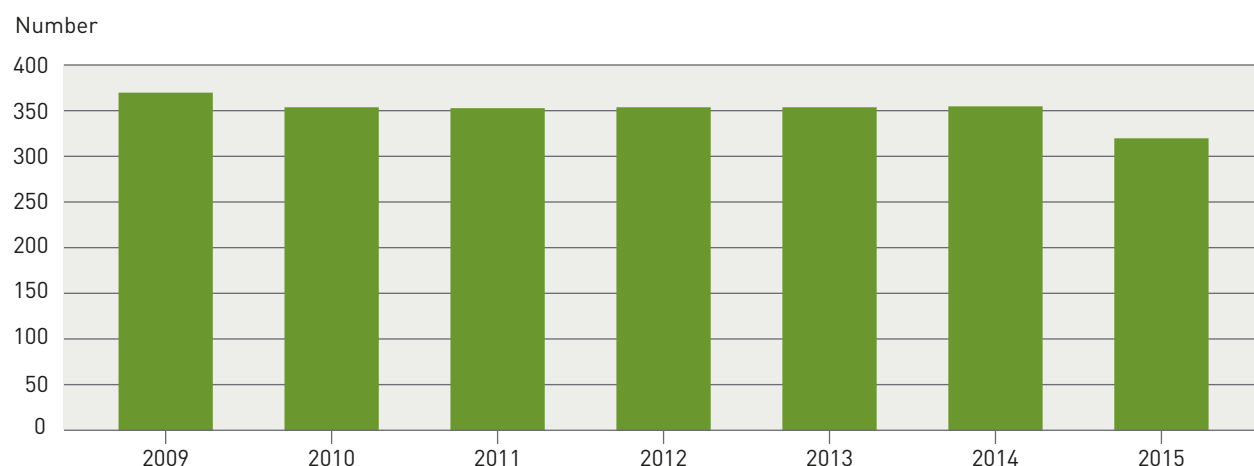
It's well known that public library stock holdings of physical books have been falling in recent years. Critics of this trend are worried that the decline in library stocks may undermine the diversity and general range of literature avail-

Fig. 38: Public library materials expenditure



Source: Biblioteksstatistikken (Public Library Statistics), BIB06, Danmarks Statistik (2009-2015) and The Danish Agency for Culture (2000-2008). Adjusted as per the retail price index from Danmarks Statistik, PRIS61.

Fig. 39: Public library branches



Source: Danmarks Statistik, BIB2B

able to the public. In what follows, the panel looks more closely at precisely this question – the relationship over a period of time between the volume of books available and the diversity of the literature on offer at public libraries¹⁶.

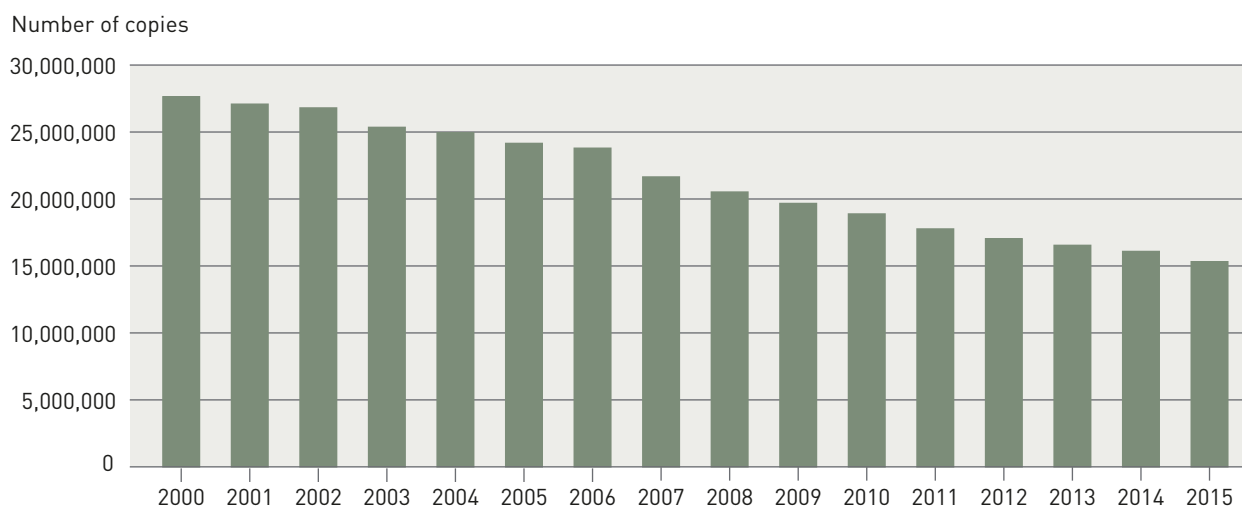
Fig. 41 shows, in stages, how many copies of each public library title are available¹⁷. We can see from the table that, from 2012 onwards, more and more titles are discarded, with the effect that copies of these titles are no longer

available in public libraries. The table also shows, however, that despite this, a small gross increase is recorded using 2012 as the baseline. In other words, despite the fact that a large amount of titles disappear from library shelves, ongoing book purchase means that the overall selection on offer grows slightly.

An examination of the figures for this period shows a fall in the number of those titles that were available in a large number of copies.

¹⁶ The following analysis has been carried out on the basis of public library reports for the statutory library budget. The basis for this is the stock holding report carried out at the turn of the year 2012/2013. Each year, at year's end, public libraries submit an account of all the library material they are holding to the Danish Agency for Culture, as it is these stock holdings that form the basis for the statutory library budget calculation.

¹⁷ A "title" in this context is the same as a Danish library "Faust number". This is a unique number given by the Danish library system to each publication held in the system. This "Faust number" can form the basis for several different Faust numbers if, for example, the title is published as a new edition with a new foreword.

Fig. 40: Book stocks in public libraries

Source: Danmarks Statistik, BIB1.

Fig. 41: Public library title stocks

	31.12.2012	31.12.2013	31.12.2014	31.12.2015
Number of titles with copies no longer available	0	12,507	23,333	39,770
Number of titles with a single copy available	82,150	84,028	87,564	91,048
Number of titles available in 2-5 copies	129,814	133,285	135,122	133,067
Number of titles available in 6-10 copies	63,021	62,930	63,279	63,206
Number of titles available in 11-20 copies	58,633	57,294	57,807	56,685
Number of titles available in 21-50 copies	60,074	58,187	57,767	56,743
Number of titles available in 51-100 copies	35,234	34,502	34,675	34,543
Number of titles available in 101-200 copies	30,229	30,197	30,232	29,698
Number of titles available in 201-300 copies	12,547	12,253	11,328	10,286
Number of titles available in 301-500 copies	6,351	6,253	5,100	4,141
Number of titles available in 501-1,000 copies	1,100	1,101	938	835
Number of titles available in 1,001-2,000 copies	215	202	183	171
Number of titles available in 2,000 copies	32	32	33	29
Total number titles	479,400	492,771	507,361	520,222
Gross increase 2012	0	864	4,628	1,052

Source: Agency for Culture and Palaces.

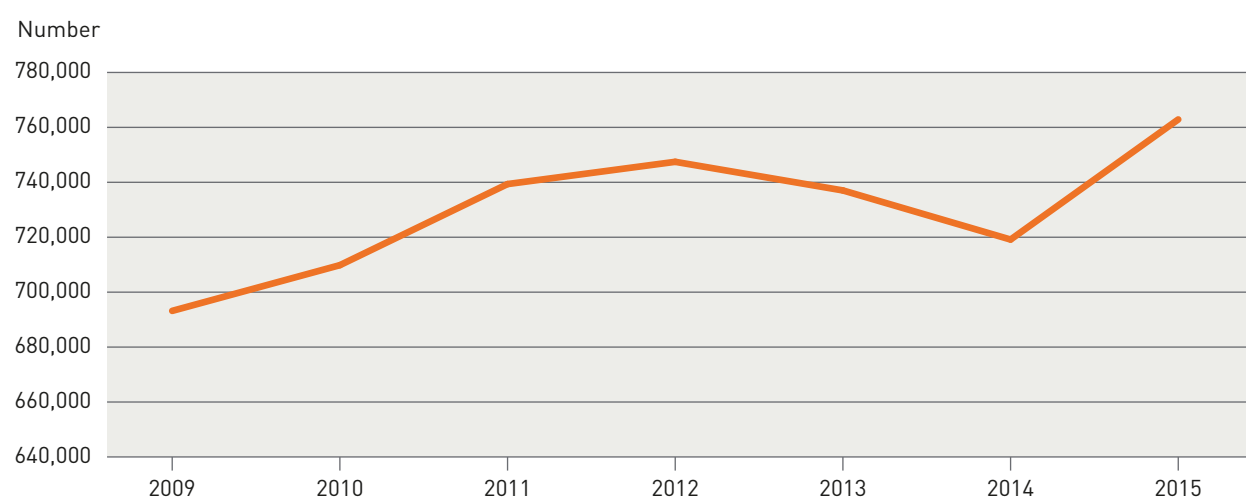
Thus, the number of titles in stages 11-16, 21-50, 51-100, 101-200, 201-300, 301-500, 501-1,000 and 1,000-2,000 all come in at a lower level in 2015 than in 2012. However, the lowest stages 0, 1, 2-5, 6-10 are the reverse of this and show progress. Overall, the figures reveal that public libraries today hold slightly more titles than they

did four years ago (1,052), but that there are fewer copies of these titles. On the other hand, we are talking about a gross stock increase here, and the fact is that almost 40,000 titles have completely disappeared from the libraries in this period.

Fig 42: The distribution of public library book stocks

	2012	2013	2014	2014
Available in more than 50 places	15.3 %	14.8 %	13.9 %	13.2 %
Available in 6-49 places	35.7 %	33.9 %	33.2 %	31.9 %
Available in 5-2 places	26.2 %	25.8 %	25.4 %	24.5 %
Available in one, single place	22.7 %	22.9 %	22.8 %	22.7 %
No longer available compared to preceding year	0	2.54 %	4.60 %	7.64 %

Source: Agency for Culture and Palaces.

Fig. 43: Inter-urban lendings between Danish public libraries

Source: Danmarks Statistik, BIB5.

Random samples amongst the discarded titles show that a large number of factual books and yearbooks feature amongst the titles that completely disappear, which makes good sense if the subject of the book is something whose currency fades with time.

As shown above, there's an increase in titles that are no longer available in the library system as a whole (Fig. 42). However, the share of titles that are only available in one single library is very stable in the period in question. The share of titles that are available in 2 to 5 libraries is seen to fall from 26.2 % to 24.5 %, just as the share of titles available in 6 to 49 libraries also falls from 35.7 % to 31.9 % in this period. The share of titles available in at least 50 public libraries falls by around two percent, from 15.3 % to 13.2 %.

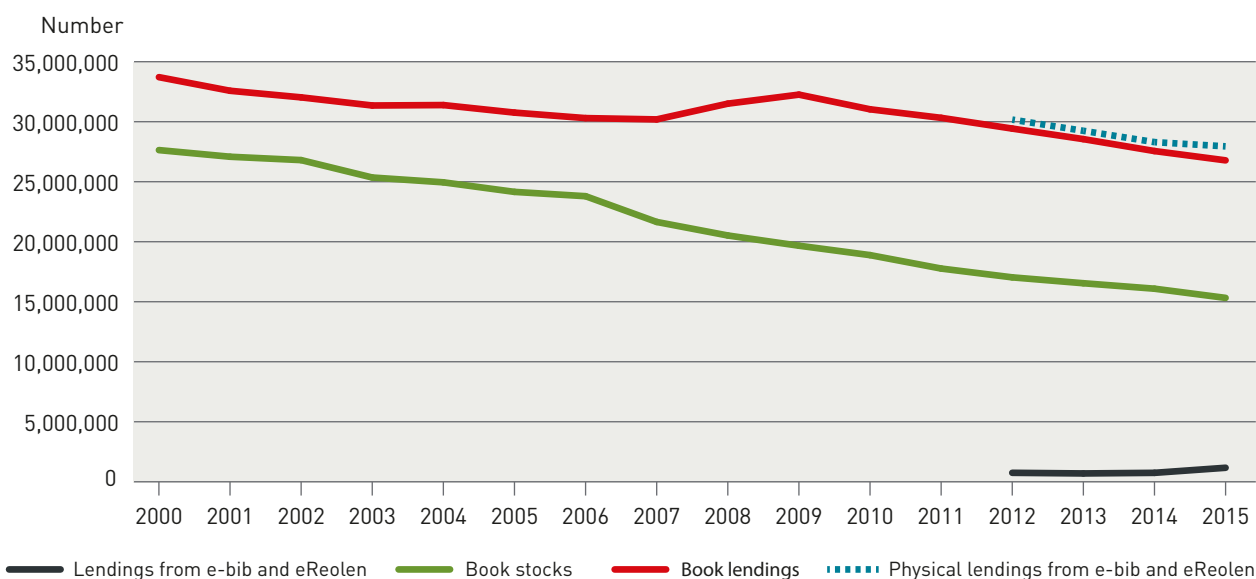
When we evaluate trends affecting the number of books public libraries make available, it is incumbent upon us to take into account the so

called inter-urban lending system, which makes it possible to order items that are not available in the lender's own local authority area. Fig. 43 above shows that, in the last seven years, there has been a rise in the number of inter-urban lendings, even though 2012-2014 shows a slight decline. The rise from 2014 to 2015 may suggest that increased scrapping of book copies by the libraries is encouraging a trend in inter-urban lendings.

4.2 PUBLIC LIBRARY BOOK STOCKS AND THE LENDING OF BOOKS AND AUDIOBOOKS

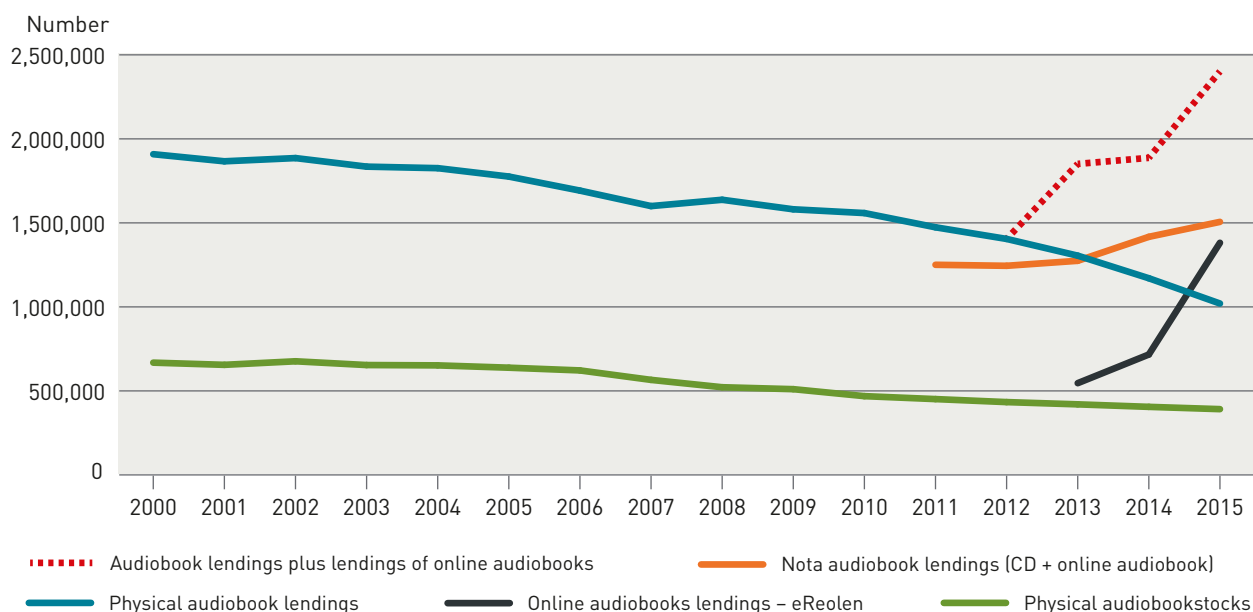
There is a consistent fall in both public library lending (re-lending not included) and stocks of physical books. Even if we include electronic lending from eReolen, and the former 'e-bib', we still see a falling curve for general book lending

Fig. 44: Lending and book stock holdings



Source: Biblioteksstatistikken, Danmarks Statistik (2009-2015), the Danish Agency for Culture (2000-2008), eReolen's monthly statistics from netbib.dk and data from e-bib.

Fig. 45: Lending and audio-book stock holdings



Source: Biblioteksstatistikken, Danmarks Statistik (2009-2015), the Danish Agency for Culture (2000-2008), eReolen's monthly statistics from netbib.dk and annual report from nota.nu.

(e-books and physical books), though this does flatten out slightly in 2015, partly due to the growth in e-book lendings (Fig. 44).

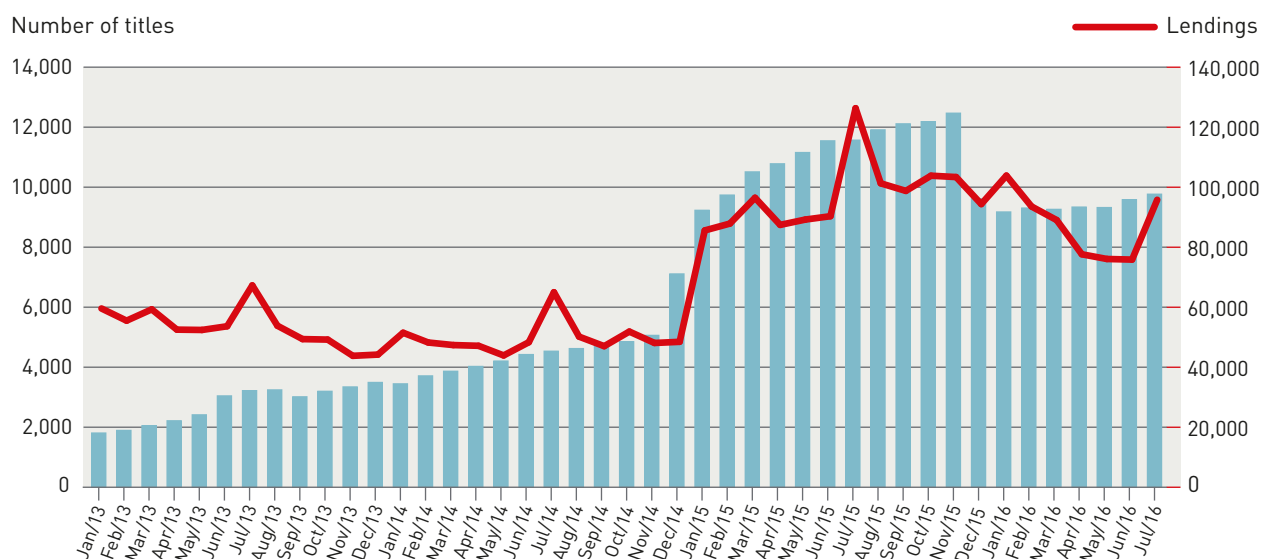
Where audiobooks in a physical format (e.g. CDs), lendings are seen to fall year by year since the turn of the century, and from 2011 onwards this negative trend has really gathered pace. However, this is counterbalanced by online audiobook lending, which in 2015 is higher than physical audiobook lending from public libraries.

If we combine lending for books, audiobooks, e-books and online audiobooks, we discover that in 2015 there's an overall rise in lending of 0.6 % vis-à-vis the 2014 figure¹⁸.

One branch of the Danish public library system that doesn't get much attention, but which nevertheless features prominently in the audio-book area is 'Nota', formerly Denmark's

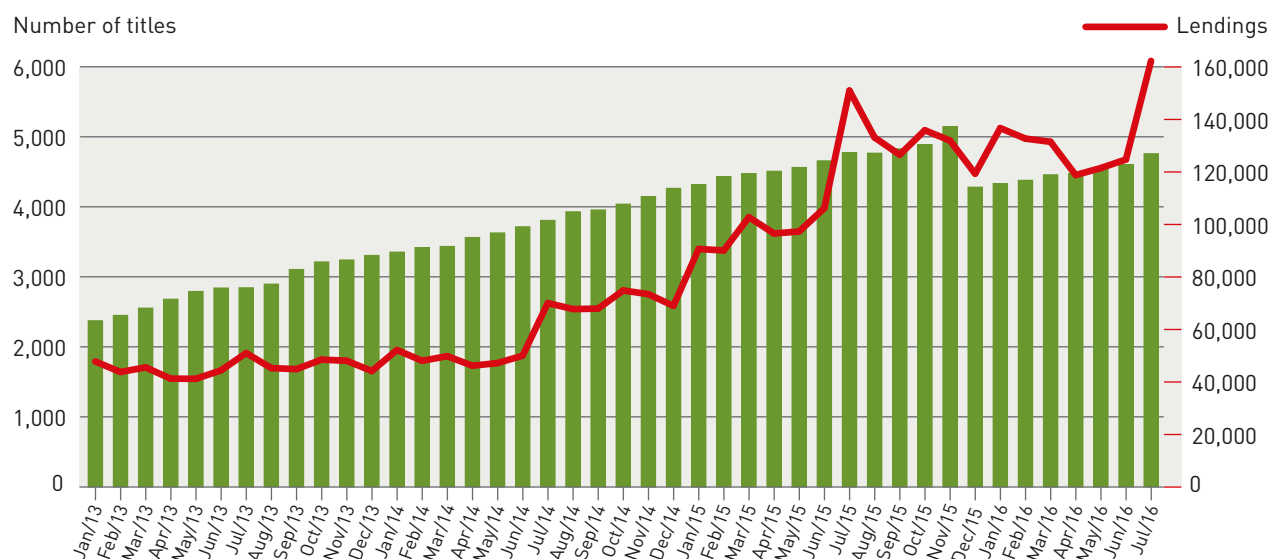
¹⁸ Read more in the publication – 'Folkebiblioteker i tal 2015', (Public libraries in numbers).

Fig. 46: The number of titles and lendings on eReolen



Source: Monthly statistics for eReolen from netbib.dk.

Fig. 47: The number of titles and lendings – online audiobook



Source: Monthly statistics for eReolen from netbib.dk.

‘Blindebibliotek’ (library for the blind). Especially in the most recent years, Nota was very popular with ‘word blind’ lenders, and this facility lends significantly more material than it did ten years ago.

Nota had around 10,000 users in 2004, but in 2015 had more than 100,000 users. The greater part of Nota’s lending consists of audiobooks. In 2015, 816,164 audiobooks on CD were lent via Nota, and also 689,740 online audiobooks (see Fig. 45).

4.3 E-BOOKS AT PUBLIC LIBRARIES

Up until very recently, public libraries played a central role in the lending and sale of e-books, both in their interaction with publishers and more broadly in terms of public debate in this area. Around the turn of the year 15/16, however, several publishers withdrew their titles from eReolen, because agreement could not be reached on lending conditions. The worry amongst publishers is that the public library system’s free lending of e-books is undermining the basis for a commercial e-book market in

Fig. 48. Trends in monthly lendings – 2016, compared with corresponding month 2015

	January	February	March	April	May	June	July
e-books	21.3%	6.5%	-7.7%	-11.2%	-14.7%	-16.0%	-24.1%
Audiobooks	50.8%	47.3%	27.9%	23.1%	24.8%	17.5%	7.5%

Source: Monthly statistics for eReolen from netbib.dk.

Fig 49: Relation between publisher sales and library lending

	Number of sold copies	Number of lendings	Ratio (number of lendings per sold copy)
Physical books and audiobooks 2015	12,921,300	27,800,492	2.15
Physical books and audiobooks 2014	14,423,100	28,725,496	1.99
e-books and online audiobooks 2015	2,803,500	2,547,394	0.91
e-books and online audiobooks 2014	1,755,500	1,314,775	0.75

Source: Monthly statistics for eReolen from netbib.dk, Danmarks Statistik BIB01 and the Danish Publishers assoc. annual statistics report.

Denmark. Thus, after the decline in the availability of titles after the turn of the year 15/16, we can see that the lending of e-books is also falling. However, in tandem with these events, the digital e-book service 'Mofibo' declared an increase of 3,000 in customer subscriptions after the withdrawal of publishers from the eReolen system.

The library service's response to the accusation that they are damaging the commercial e-book market is that their duty is to ensure citizens have free and equal access to society's informational resources – digital formats included.

In addition to this comes the question as to whether public libraries' dissemination of literature helps to generate new readers, and whether this encourages people who are already avid readers to read even more. If these arguments are true, this means that the number of potential book purchasers actually increases because of library lending rather than having a negative impact on the commercial market.

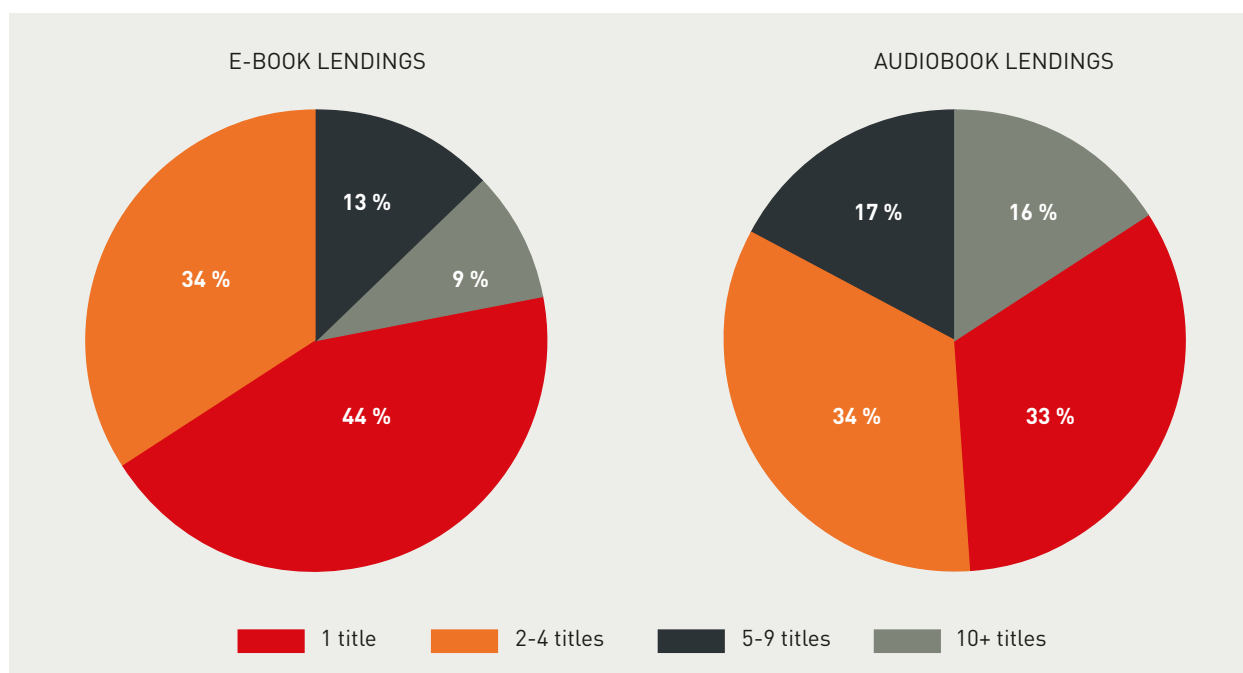
The Books and Literature Panel sought to clarify certain arguments in the above debate and encourage a wider understanding of the issues involved and, to that end, organised a seminar in May 2016. Part of this approach looked to incorporate the experience from abroad. We would encourage readers of this annual report to

read the articles by Frank Huysmans, from the University of Amsterdam, and Professor Elena Maceviciute from Borås University, Sweden, both of whom made contributions to the seminar – see chapters 6 and 7 of the report.

When we bear in mind that several big publishers withdrew their titles from eReolen, as stated above, readers will not be surprised that the latest figures for the lending and provision of titles for online audiobooks and e-books on the eReolen reflect this new situation¹⁹. Thus, we can see a decline where e-books are concerned, both in the number of titles made available and also the number of lendings (Fig. 46). However, it appears that the title reductions that have occurred have greater implications for e-books; as the lending of online audiobooks still exceeds the 2015 level, regardless of title reductions. From this it appears that the lending of e-books is far more influenced by the title range available than is the case with online audiobook lending (Fig. 48).

¹⁹ Please note the following explanation from netbib.dk: "The number of titles for individual months are extracted at the start of the next month. Thus the number of titles for December 2015 is taken as of 05.01. 2016, which means that the loss of agreed supply for 2016 is actually reflected in the figures for December 2015. The number of titles that in real terms were available in December was, therefore, higher than shown in the graph.

Fig. 50: Number of lendings per unique user of eReolen



Source: eReolen, National data. Data extracted 23-08-2016.

As stated above, the question as to whether public library lending of e-books and online audiobooks represents a threat to the commercial market has been the subject of much debate. In terms of statistics, there is no precise way of answering this question. There are many factors that come into play and the available data is fairly scant. For example, there is no data that examines and compares people's book purchasing habits vis-à-vis the lending of books. Thus, the relevant data available only allows us to point to some indications and tendencies. However, by comparing public library and eReolen lending figures with Danish publishing figures for the year's overall unit sales, a basic graph showing the relationship between lending and sales can in fact be created. The same method is used to examine the Swedish e-book market in the article by Elena Maceviciute (see chapter 7).

The table on page 41 (**Fig. 49**) compares the number of titles sold in 2015 and 2014 with the number of lendings from public libraries and eReolen. Sales to the public sector have not been included, as the digital part of these sales is difficult to compute in terms of the number of copies. This is because a large part of the sales consist of licenses to learning portals.

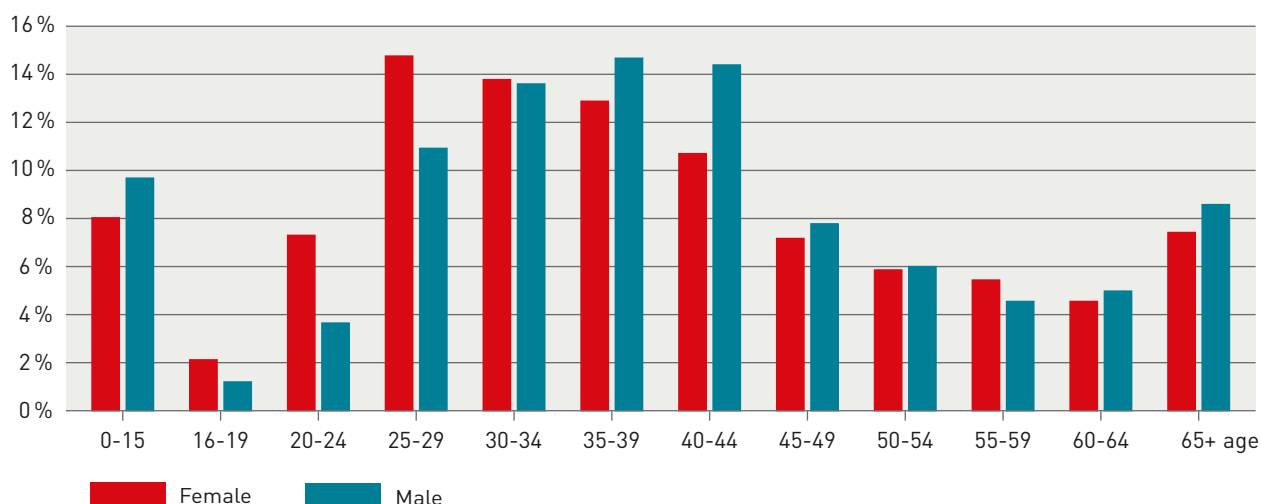
An obvious point, but one that still perhaps needs highlighting, is that physical items are different in nature to digital items, and public

library lendings of physical items are weighted by, for example, the presence of a large back catalogue of older titles that are still being lent out. Another difference we see between physical and digital items is that the catalogue for children's books is significantly larger for physical books and a large element of the lending share is made up of children's books. Another issue is that there will be digital teaching titles that sell as retail trade but which are not available for lending via eReolen. Audiobooks are included in the table.

The table showing the ratio between sales and public library lending shows that, both in 2014 and 2015, there are more lendings per sold copy for physical books, than for digital books. However, a modest general rise in the ratio between lending and sales can also be seen. Thus, in 2015 there are more lendings per sold copy in 2014 for both physical and digital books.

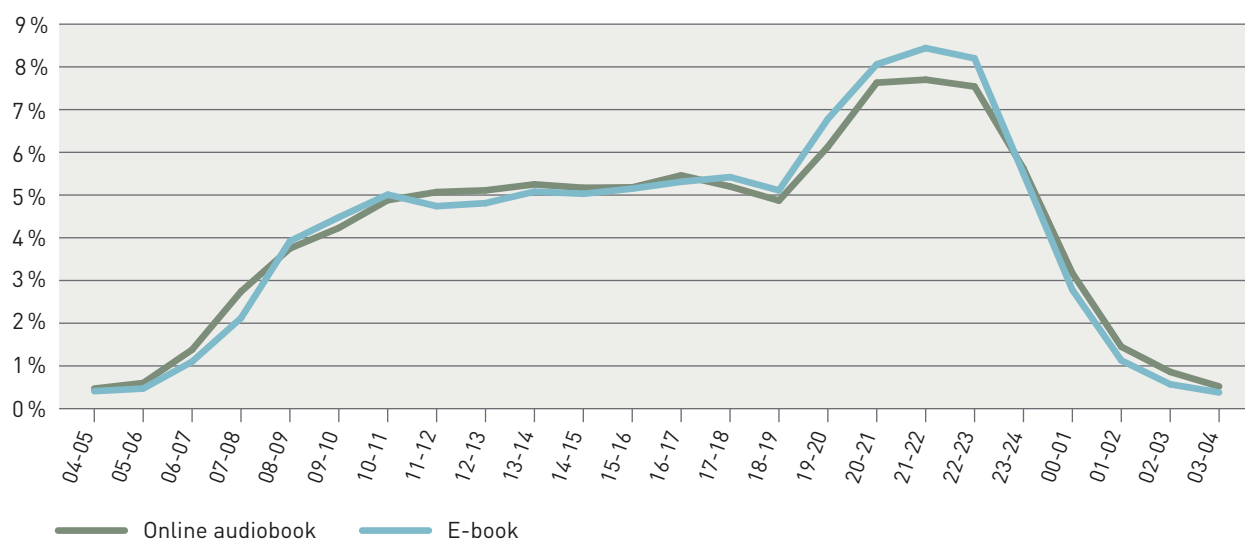
eReolen keeps a record of how many digital titles each individual takes home. Around 78 % of all e-book lendings in 2016 have been enacted by people who lend four or fewer e-book titles. Where audiobooks are concerned, approx. three quarters of users have lent, as a maximum, four books in 2016. In other words, both stats show that there are a large number of lenders who only lend a small number of titles – perhaps to sample the digital options thereof. On the other

Fig. 51: eReolen lenders in Copenhagen by gender and age



Source: Copenhagen Municipal Authority libraries. Please note that 'age' refers to the age of the card holder and therefore not necessarily the age of the reader.

Fig. 52: Lending by time point of lending transaction



Source: Copenhagen Municipal Authority libraries

hand, the share of lenders of audiobooks in 2016 who have taken home more than 10 titles is 16 %, which illustrates the current increased interest in online audiobooks.

Electronic lending offers new options for the collection of statistics because of the supplementary data each loan generates. To date, no formalised system has been developed for this type of 'supplementary data', but via Copenhagen Municipality's library services, the Books and Literature Panel has gained access to some of the statistics, which we imagine would be of use in the long term.

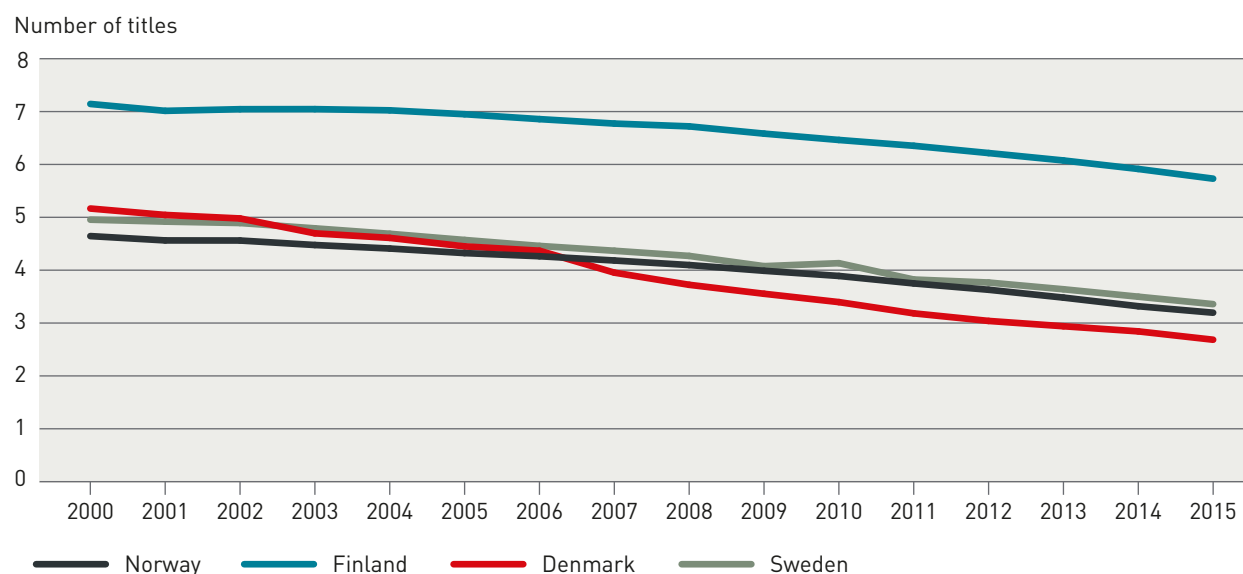
It should, therefore, perhaps, be stressed that the statistics below are compiled and presented

on the basis of data from Copenhagen municipal authority and therefore do not necessarily reflect national trends.

If we classify users of e- and audiobooks according to gender and age, two different patterns emerge. For women, most lenders are in the 25-29 age group. For men, the number of lenders reaches a peak ten years later than women, namely in the 35-39 age group (Fig. 51)

We can conclude from the following graph (Fig. 52) that there is a surge in e-book lending in the hours after most people eat their evening meal. However, other scenarios show that that e-books are lent at all hours of the day. It seems obvious to infer that the trend in the lending

Fig. 53: Book stock holdings in public libraries in Scandinavia per inhabitant



Source: norden.org, tilastot.kirjastot.fi, ssb.no, medienorge.uib.no, kb.se, statistikbanken.dk. Please note that lending and stock figures for Sweden in 2014 are estimates only, as no data is available for this year due to restructuring of statistics.

Fig. 54: Physical book stock trends in public libraries in Scandinavia – 2000-2015

	Trends in physical book stocks – 2000-2015			Trends in physical book stocks per inhabitant – 2000-2015		
	Stock 2000	Stock 2015	Trend	Stock per inhabitant 2000	Stock per inhabitant 2015	Trend
Norway	20,917,000	16,662,027	-20.3 %	4.64	3.20	-31.2 %
Finland	37,013,045	31,446,786	-15.0 %	7.14	5.73	-19.8 %
Denmark	27,634,549	15,320,119	-44.6 %	5.17	2.68	-48.0 %
Sweden	44,012,291	33,073,155	-24.9 %	4.95	3.36	-32.2 %

Sources: norden.org, norden.org, tilastot.kirjastot.fi, ssb.no, medienorge.uib.no, kb.se, statistikbanken.dk.

curve is linked to time points throughout the whole day when people actually read books, but there's no data available for reading habits that might confirm this supposition.

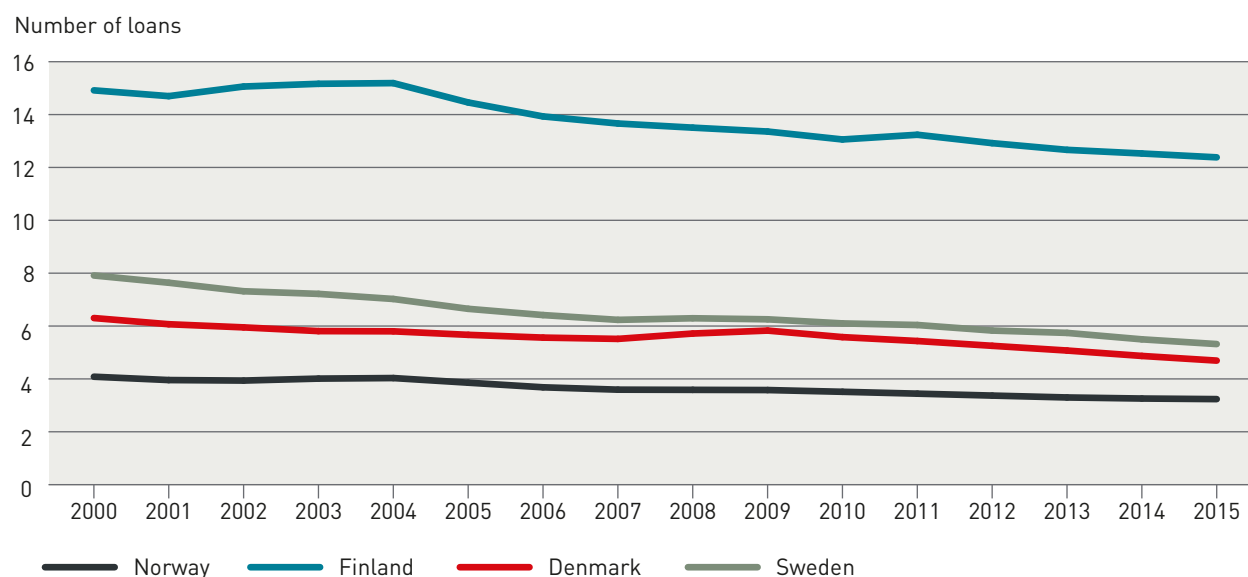
4.4 COMPARISON OF PUBLIC LIBRARY LENDINGS IN SCANDINAVIA

Apart from Iceland, all Nordic countries publish yearly statistics regarding the use of public libraries. If we compare these figures, it becomes clear that the Finnish public library system differs from public library systems in the rest of Scandinavia.

In the graph above we can examine book stock holdings in public libraries per inhabitant. The graph shows that the book stocks trend in all the Nordic countries in these years is downwards, but this phenomenon is happening much more quickly in Denmark. Denmark has reduced its book stock holdings in public libraries by 44.6 % since 2000. Then comes Sweden, Norway, and finally Finland with a fall of 15 %. If we take population trends²⁰ into account, the picture does change slightly; most notably for

²⁰ Population growth 2000-2015: Norway 16 %, Sweden 11 %, Denmark 7 % and Finland 6 %.

Fig. 55: Public library lending of physical books per inhabitant in Scandinavia



Sources: norden.org, tilastot.kirjastot.fi, ssb.no, medienorge.uib.no, kb.se, statistikbanken.dk. Please note that lending and stock figures for Sweden in 2014 are estimates only, as no data is available for this year due to restructuring of statistics.

Fig. 56: Trends in physical book lending for public libraries in Scandinavia – 2000-2015.

	Trends in physical book lending – 2000-2015			Trends in physical book lending per inhabitant – 2000-2015		
	Lending 2000	Lending 2015	Trend	Lending per inhabitant 2000	Lending per inhabitant 2015	Trend
Norway	18,387,000	16,870,018	-8.3 %	4.08	3.24	-20.8 %
Finland	77,281,244	67,944,365	-12.1 %	14.92	12.38	-17.0 %
Denmark	33,712,775	26,780,412	-20.6 %	6.30	4.69	-25.5 %
Sweden	70,286,427	52,387,418	-25.5 %	7.91	5.32	-32.8 %

Sources: norden.org, tilastot.kirjastot.fi, ssb.no, medienorge.uib.no, kb.se, statistikbanken.dk.

Norway, which in percentage terms has experienced the biggest population growth.

A shared trend for all the Nordic countries is a general decline in the number of lendings for physical books. Finland clearly has the highest lending rate per inhabitant. Then comes Sweden, Denmark and Norway. In percentage terms, the decline in lending is greatest in Sweden with 25.5 %. Then comes Denmark, Finland and Norway. If we look at lendings per inhabitant, the figures change somewhat; and again the effect is greatest for Norway, the country that has seen the biggest population growth in percentage terms.

5. LITERATURE READING AND USAGE

5.1 READING

Overall, reading habits amongst Danes are very stable, despite the fact that the spread of media material on offer has never been greater. The keenest readers of fiction are to be found amongst the older part of the population. Income and educational levels are a factor in how often people read, and there are also more readers who read frequently in the capital and larger towns. As yet, the e-book has few dedicated readers, and the majority of the population never read e-books.

Main points in this chapter:

- There's a modest fall of approx. 1 percent in the share reading fiction daily/almost daily in this period. From 16.8 % in 2010 to 15.8 % in 2015.
- Women are the most frequent readers/users of fiction, but the share of women reading weekly, or more frequently still, falls from 49.0 % in 2014 to 46.6 % in 2015.
- The share of readers reading factual literature daily/almost daily, or 3-4 days per week has risen from 19.2 % in 2011 to 21.7 % in 2015.
- The share of respondents who never read is greatest amongst the younger generations, and it's especially amongst 20 year olds that we find most people who never read fiction.
- The share who read fiction daily/almost daily is at the same level, regardless of whether the relevant household income is at the lowest or highest end.

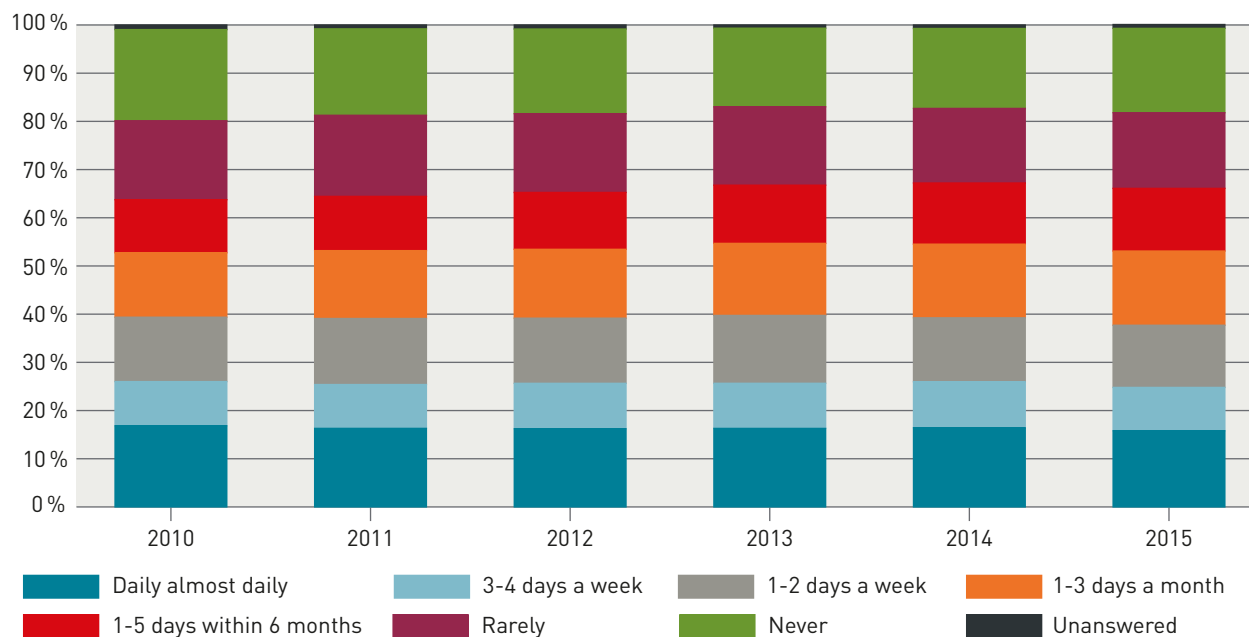
- 24 % of people living in rural areas never read fiction, whilst in the capital region the figure for this is 12.8 %
- 60.6 % of Danes never read e-books. 3.4 % were reading e-books on a daily, or almost daily, basis in 2015.

5.1.1 General reading habits

If we look broadly at the reading of fiction, there are no obvious big fluctuations in the last six years, despite the fact that the book market and the overall media material on offer has undergone significant changes in this period. Thus we can see a modest fall of approx. 1 percent in the share reading fiction daily/almost daily in this period – from 16.8 % in 2010 to 15.8 % in 2015. The share of people who never or seldom read fiction is also falling slightly – from 35.3 % in 2010 to 33.2 % in 2015. Thus, the trend (though slight) is that more people are reading fiction. However, the frequency of their reading is falling. We can also see that the share of respondents reading '1-3 days a month', or '1-5 days in the following half year', has risen from 24.4 % to 28.4 % in this period (see [Fig. 57](#)).

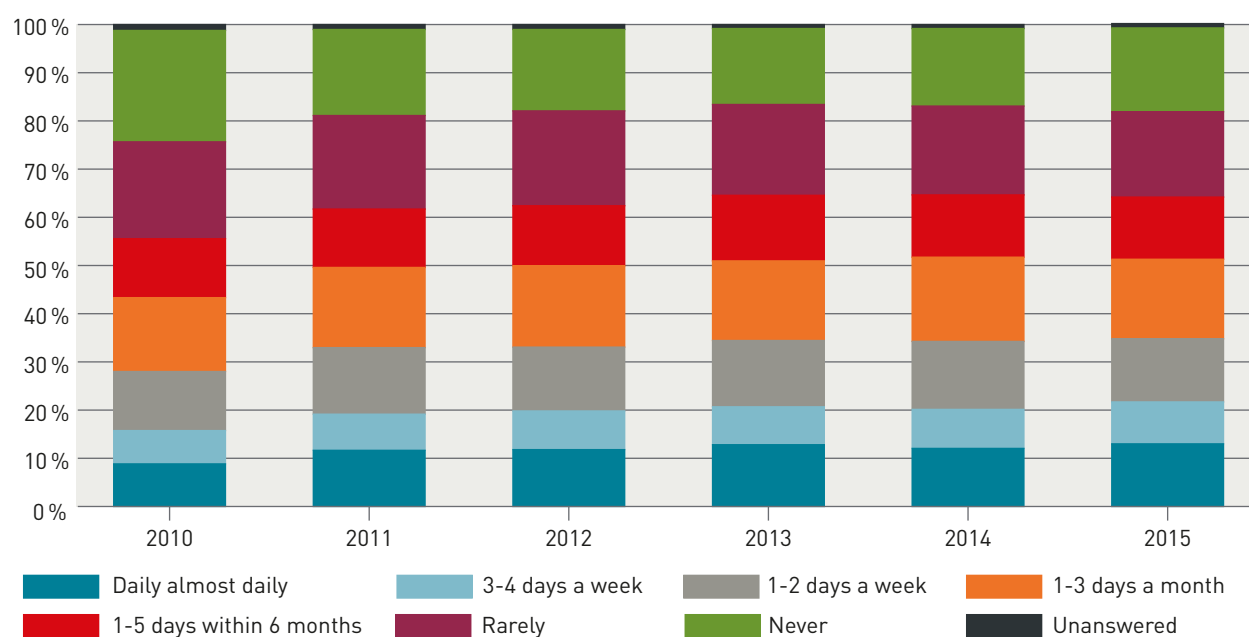
For factual literature, a slight rise in reading frequency can be seen. The share of readers reading factual literature 'daily/almost daily', or '3-4 days per week' has risen from 19.2 % in 2011 to 21.7 % in 2015. Furthermore, the share of people that have never, or seldom, read factual literature has fallen by approx. 2.2 percent from 2011 to 2015. Thus, the rise that can be seen in the reading of factual literature takes place despite the fact that the number of new editions of factual literature is falling. It should, however, be pointed out that the factual literature category is not unambiguous in terms of

Fig. 57: Reading of fiction by frequency



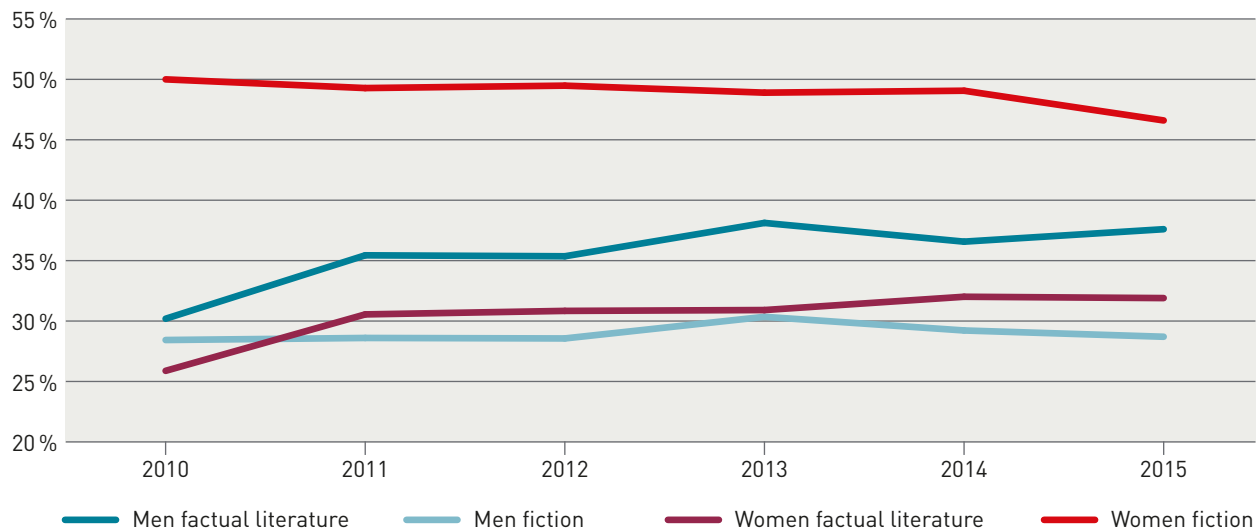
Source: Gallup, Index Danmark (HH2010, HH2011, HH2012, HH2013, HH2014, HH2015).

Fig. 58: Reading of factual literature by frequency



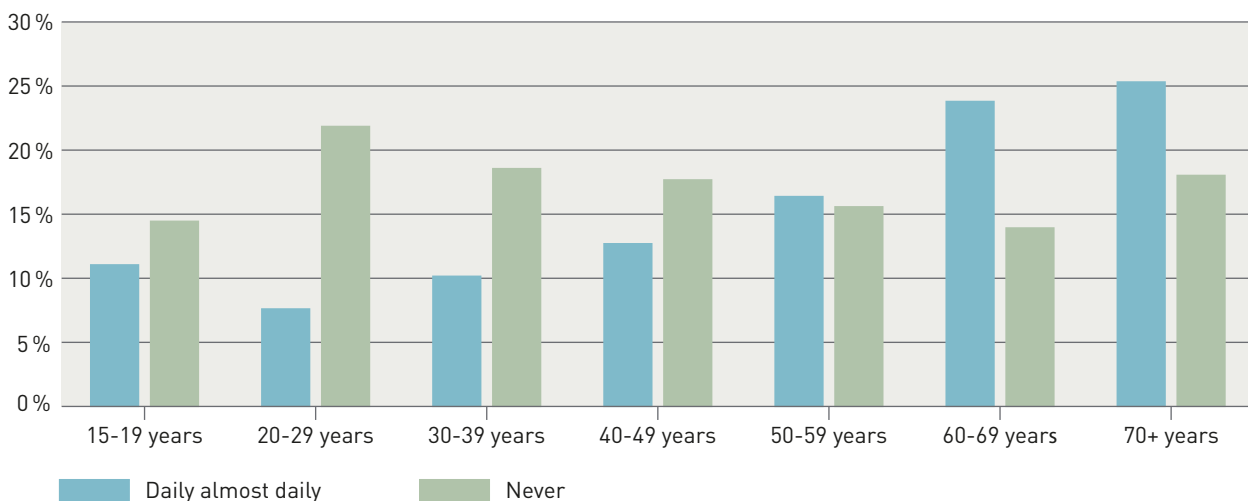
Source: Gallup, Index Danmark (HH2010, HH2011, HH2012, HH2013, HH2014, HH2015).

Fig. 59: Reading weekly or more frequently than that



Source: Gallup, Index Danmark (HH2010, HH2011, HH2012, HH2013, HH2014, HH2015). . The description 'Reading weekly or more frequently than that' covers the respondents' replies that they read either 'daily/almost daily', '3-4 days per week', or '1-2 days per week'. There is a remarkable swing in the data for 2010, which cannot be immediately explained.

Fig. 60: Reading of fiction by age group – 2015



Source: Gallup, Index Danmark (HH2015).

statistics, in as much that it isn't clear to what extent the respondents have included educational course texts they have used in their responses (see Fig. 58).

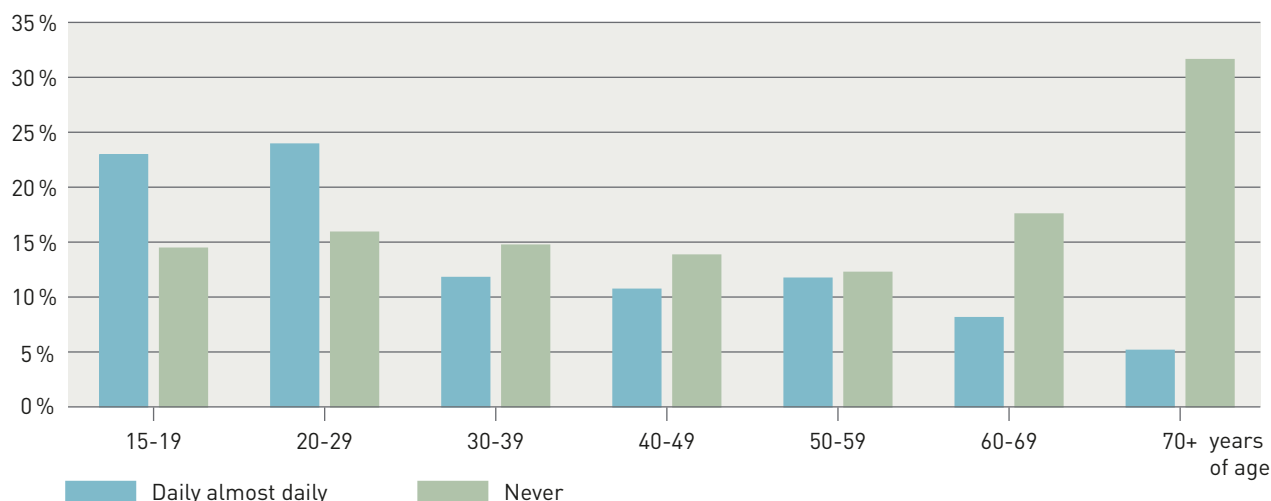
Women are clearly the most frequent readers/users of fiction, but this frequency is falling, and the share of women reading weekly, or more frequently still, is falling from 49.0 % in 2014 to 46.6 % in 2015. The same dip cannot be seen in the curve for men's use of fiction, which however has also fallen from 2013.

Men read factual literature more frequently than women, but the gender difference is not as sharp as for fiction. Both sexes read factual liter-

ature slightly more often in 2015 than they did in 2011 (see Fig. 59 above).

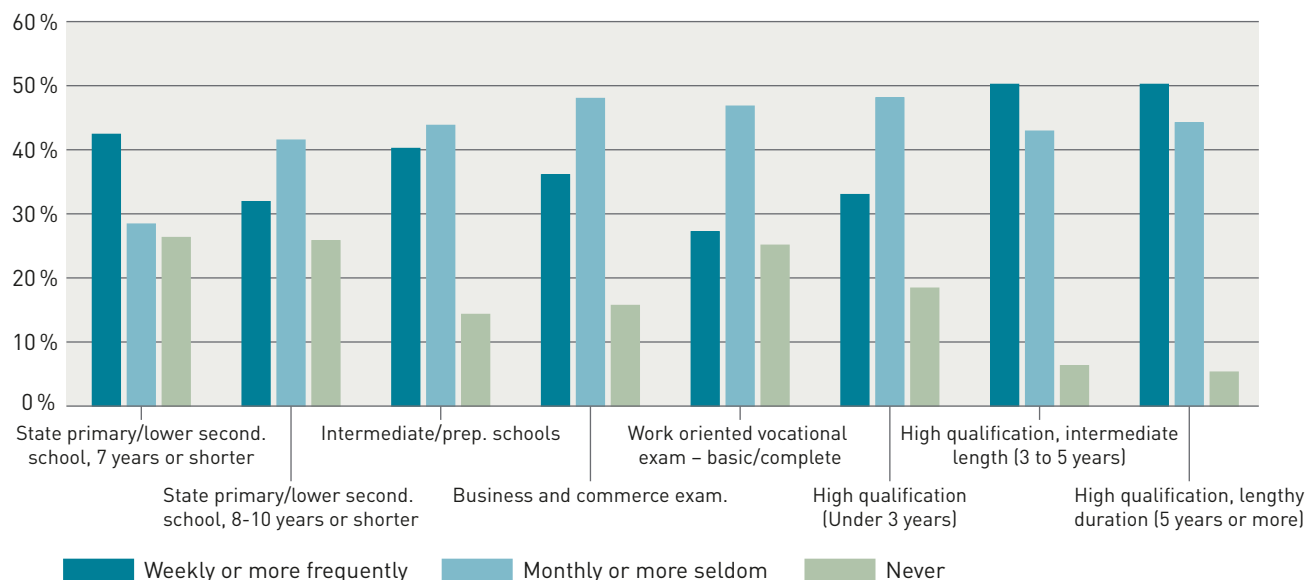
If we look at the maximum stats for the reading of fiction and divide them according to age, it becomes clear that we find the most diligent fiction readers amongst the oldest part of the population. For respondents older than 50, there are more people who read daily/almost daily than there are people who never read at all. The share of respondents who never read is greatest amongst the younger generations, and it's especially amongst 20 year olds that we find most people who never read fiction (see Fig. 60 above).

Fig. 61: Reading of factual literature by age group – 2015



Source: Gallup, Index Danmark (HH2015).

Fig. 62: Fiction reading frequency – 2015 (educational levels)



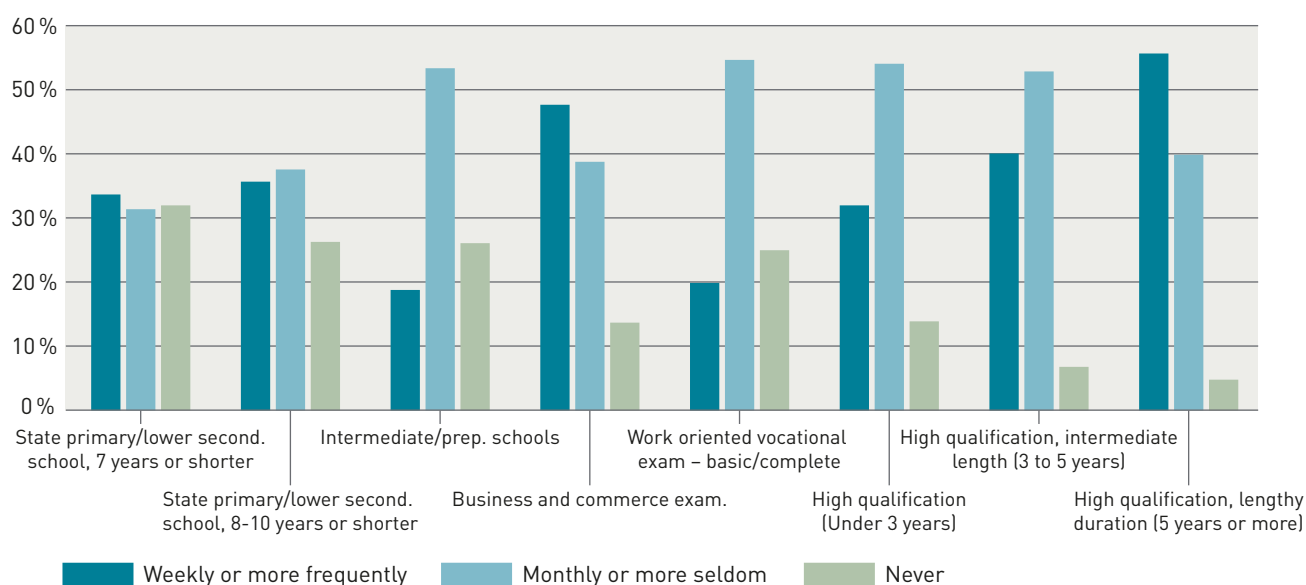
Source: Gallup, Index Danmark (HH2015). The description 'Reading weekly or more frequently than that' covers the respondents' replies that they read either 'daily/almost daily', '3-4 days per week', or '1-2 days per week'.

For factual literature, the group with the largest share of daily readers are respondents in their 20s, closely followed by the 15-19 year old group. This is presumably linked to daily reading for study activities in these age groups. At any rate, we see a significant drop from the age group 20-29 to age group 30-39. For people older than 70, 31.6 % never read factual literature, which represents a rise on last year of 2.6 percent (Fig. 61).

When classified according to educational levels, it becomes clear that fiction reading, seen statistically, happens most often amongst highly

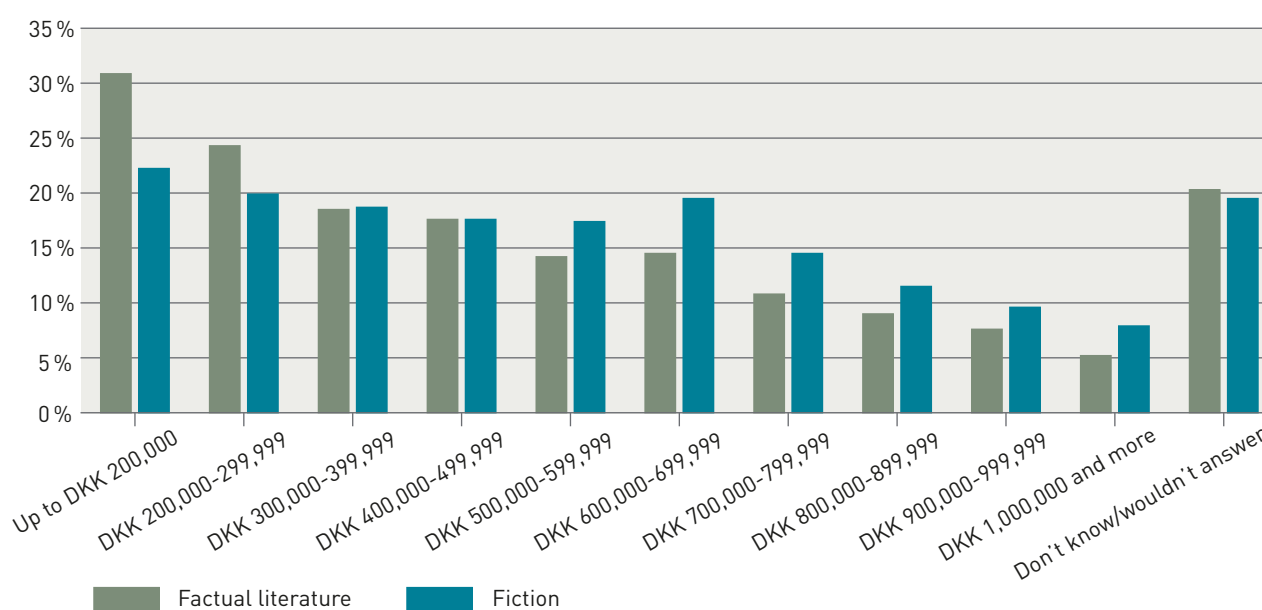
educated people, and correspondingly, the share of people who never read fiction is greatest amongst those whose highest educational level is lower secondary school. It's worth noting, however, that there are around 40 % of people who read fiction on a weekly basis that state their educational level as 'Lower secondary – 7 years or less' and "Mellem-/real-/præl". As these are intermediate school ranks that have not existed for many years, this suggests that older people – regardless of educational level – generally read fiction more often than younger people (Fig. 62).

Fig. 63: Reading frequency factual literature – 2015 (educational levels)



Source: Gallup, Index Danmark (HH2015). The description 'Reading weekly or more frequently than that' covers the respondents' replies that they read either 'daily/almost daily', '3-4 days per week', or '1-2 days per week'.

Fig. 64: Share amongst different income groups that never read (2015)



Source: Gallup, Index Danmark (HH2015).

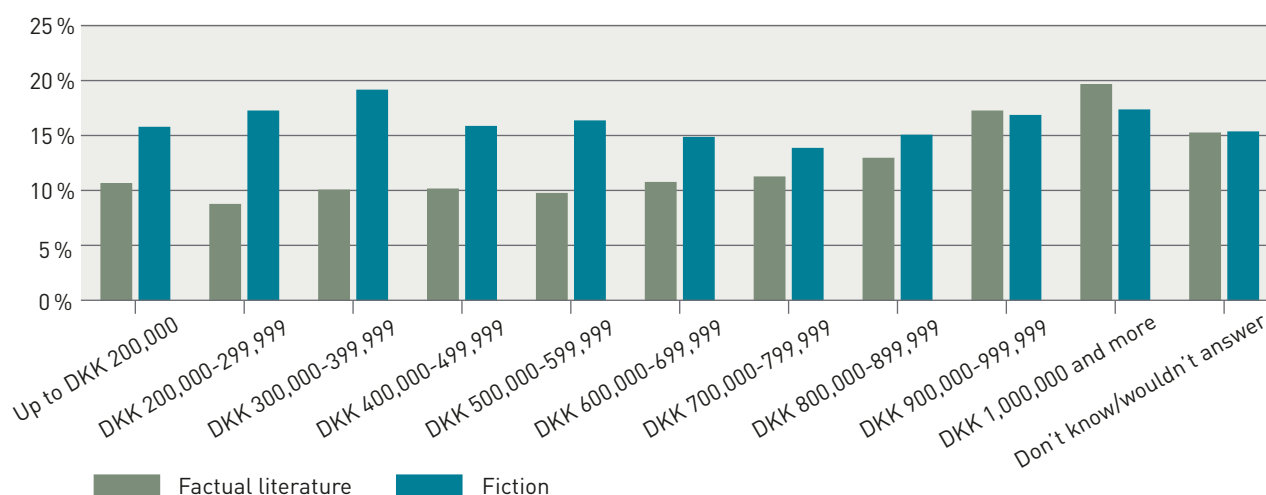
When we study the division of readers of factual literature according to educational background, it becomes clear that there's also a tendency for the most well educated to read more frequently in this category as well.

It is, however, noteworthy that respondents with the 'Stud.-/HF-/HH-eksamen/HTX-eksamen' (job oriented/vocational) qualification as their highest qualification are the group that reads factual literature at the second most

frequent level, only surpassed by – 'High qualification, lengthy duration'. This supports the thesis that the reason 15-29 year olds often read factual literature is due to the studies in which they are involved. Again with factual literature, it's people whose highest educational level was basic secondary school that have the highest number of people who never read (Fig. 63).

If we look at the never read category, it's clear that the share falls as the household

Fig. 65: Share amongst different income groups that read on a daily/almost daily basis (2015)



Source Gallup, Index Danmark (HH2015)

Fig. 66: Reading of factual literature in relation to domicile

	Daily/ almost, daily	3-4 days a week	1-2 days a week	1-3 days a month	1-5 days in 6 months	Seldom	Never	Un-an- swered
A rural area	8.6 %	7.0 %	13.9 %	14.9 %	11.7 %	19.6 %	23.0 %	1.4 %
A town with under 10,000 inhabitants	9.9 %	7.0 %	12.0 %	16.8 %	14.0 %	20.2 %	19.3 %	0.8 %
A town with 10,000-50,000 inhabitants	11.5 %	6.7 %	12.9 %	17.6 %	13.4 %	18.6 %	18.5 %	0.8 %
A town with 50,001-500,000 inhabitants	18.3 %	12.2 %	12.3 %	14.9 %	11.9 %	15.2 %	14.4 %	0.9 %
The capital region	16.1 %	10.9 %	14.5 %	16.8 %	12.5 %	14.9 %	13.5 %	0.8 %

Source: Gallup, Index Danmark (HH2015).

income rises. Amongst the respondents with the lowest household income, the share of people that never read factual literature is a bit higher than the share of people that never read fiction. For middle income groups, the reverse is the case. Here, the share of people that never read fiction is a bit higher than the share of people that never read factual literature (Fig. 64).

So whilst there is a link between income levels and the share of respondents who never read, this shared trend does not apply amongst those who read literature most avidly. The share of people who read fiction daily/almost daily

is at the same level, regardless of whether the relevant household income is at the lowest or highest end. On the other hand, where factual literature is concerned, the most frequent readers are to be found amongst the highest income earners.

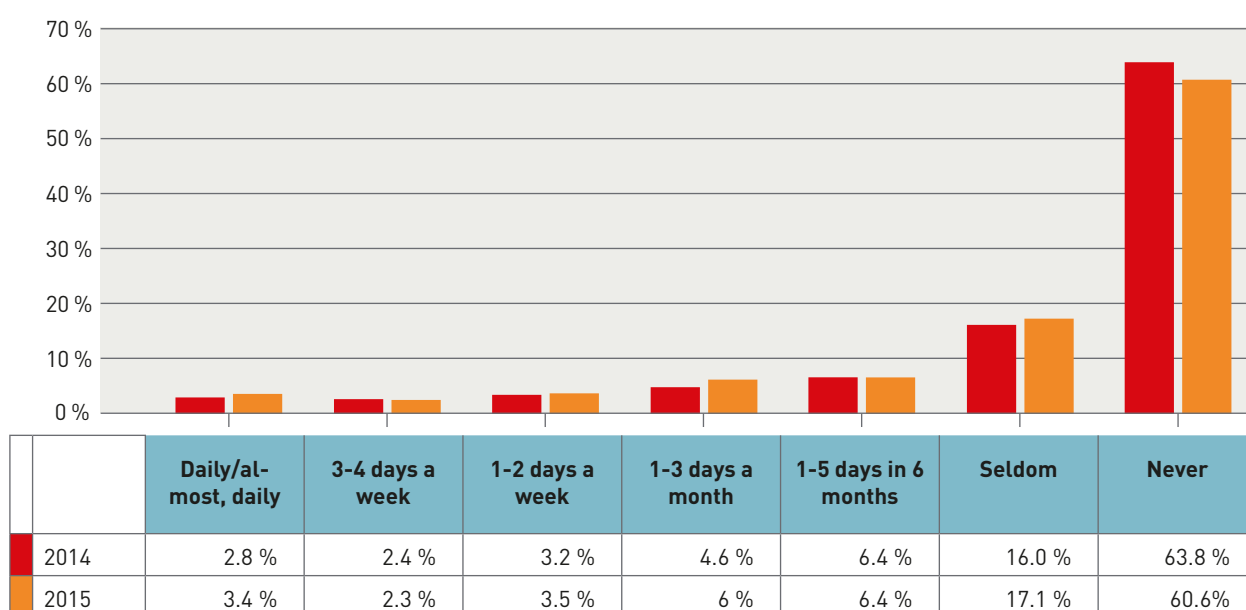
A trend can be seen whereby people in larger towns and the capital read more often than those who live in small towns or rural areas. Thus, the share of people who never read either fiction or factual literature is greatest in the countryside.

Fig. 67: Reading of fiction in relation to domicile

	Daily/ almost, daily	3-4 days a week	1-2 days a week	1-3 days a month	1-5 days in 6 months	Seldom	Never	Un-an- swered
A rural area	12.7 %	8.3 %	12.7 %	11.9 %	11.2 %	18.0 %	24.0 %	1.2 %
A town with under 10,000 inhabitants	15.4 %	7.4 %	12.1 %	14.9 %	12.0 %	17.3 %	20.3 %	0.6 %
A town with 10.000-50.000 inhabitants	16.5 %	9.4 %	12.1 %	15.1 %	12.7 %	15.6 %	17.9 %	0.8 %
A town with 50.001-500.000 inhabitants	15.2 %	8.7 %	14.5 %	16.4 %	14.3 %	15.4 %	14.7 %	0.8 %
The capital region	17.2 %	10.9 %	13.5 %	17.5 %	14.2 %	13.1%	12.8 %	0.7 %

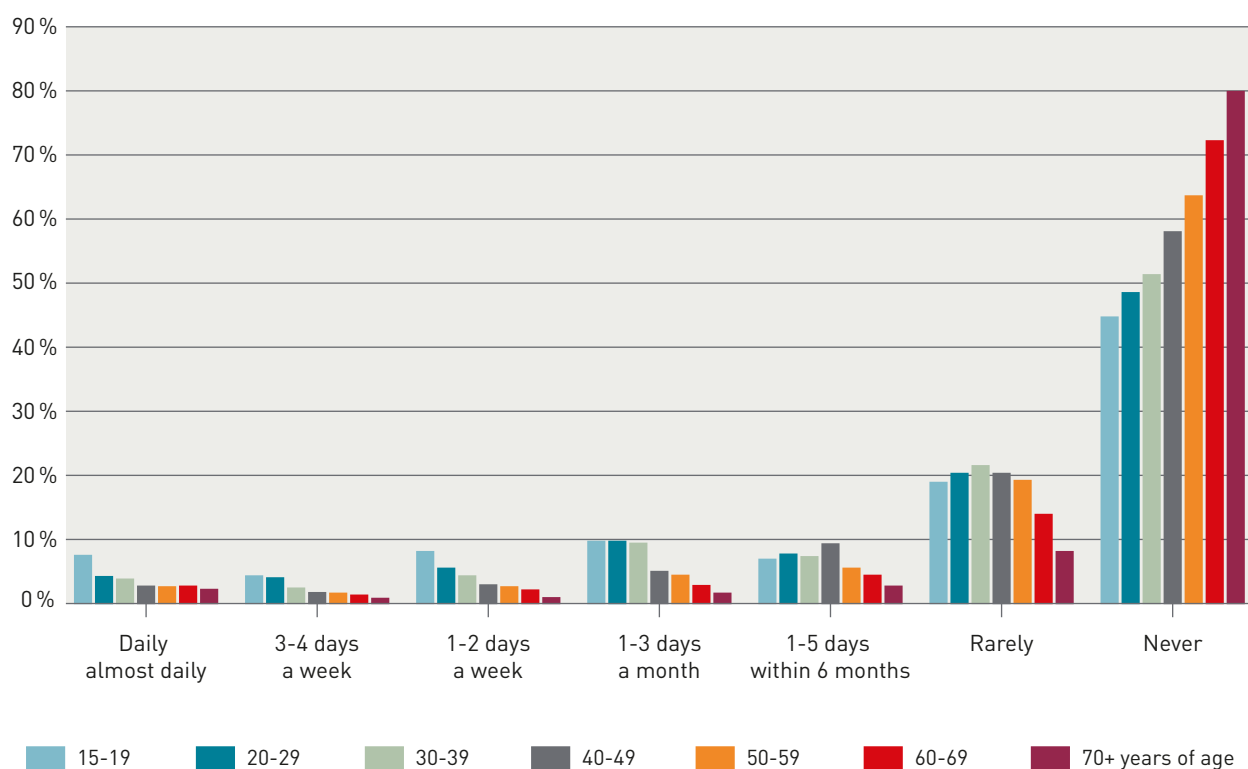
Source: Gallup, Index Danmark (HH2015).

Fig. 68: Reading of e-books 2014-2015



Source: Gallup, Index Danmark (HH2014, HH2015).

Fig. 69: Reading of e-books by selected age groups – 2015



Source: Gallup, Index Danmark (HH2015).

8.6 of people in rural areas read factual literature daily or almost daily, and in towns with more than 50,000 inhabitants (for ex. the capital region) the share is 18.3 %, which gives a differential of 9.7 percentage points between high and low. There's also a big difference between high and low amongst those who never read factual literature, with 9.5 percentage points as the difference between rural areas and the capital region (Fig. 66).

For fiction, the fluctuations between high and low are somewhat smaller with the exception of those who never read fiction. 24 % of people living in rural areas never read fiction, whilst in the capital region the figure is 12.8 % On the other hand, the difference between the capital region and rural areas for those who read fiction on a daily/almost daily basis is only 4.5 percentage points in favour of the capital region (Fig. 67).

5.1.2 The reading of e-books

From 2014 onwards, Gallup has asked respondents about their reading of e-books. Even though the share that never read e-books has fallen by 3.2 percentage points from 2014 to 2015, it's still the case that 60.6 % of those asked never read e-books (Fig. 68).

Age is a factor with regard to the reading of e-books. Young people are the ones who have taken more readily to this technology. Thus, the share of people that have never read an e-book rises as we move upwards through the age groups. We can also see that young people are the majority group that read e-books on a daily/almost daily basis (Fig. 69).

6 E-BOOK LENDING IN THE NETHERLANDS IN A EUROPEAN PERSPECTIVE

Frank Huysmans – Professor of library science, University of Amsterdam, researcher and consultant, WareKennis, Den Haag. frank@warekennis.nl

6.1 THE PUBLIC LIBRARY LANDSCAPE IN THE NETHERLANDS

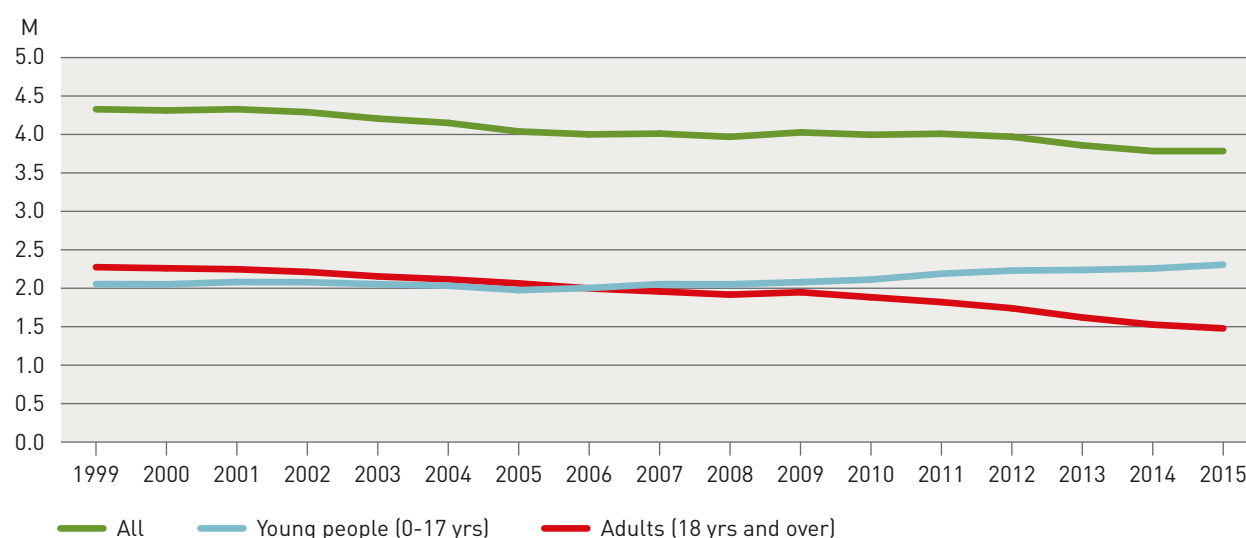
Since the turn of the millennium, the number of public library services has declined considerably, from 544 in 1999 to 156 in 2015 (Statistics Netherlands, 2016). A policy program called Library Renewal (2000-2008) brought about a limited number of larger library bodies through mergers of local libraries. Public library bodies provide public library services in a range of municipalities. The 156 bodies are currently operating:

- 782 branches with a minimum of 15 opening hours per week
- 215 service points, open 4-15 hours per week
- 55 mini service points, open less than 4 hours per week
- 67 delivery points

- 11 self-service libraries without staff
- 10 mobile libraries with 141 stops (Netherlands Public Library Association, 2016).

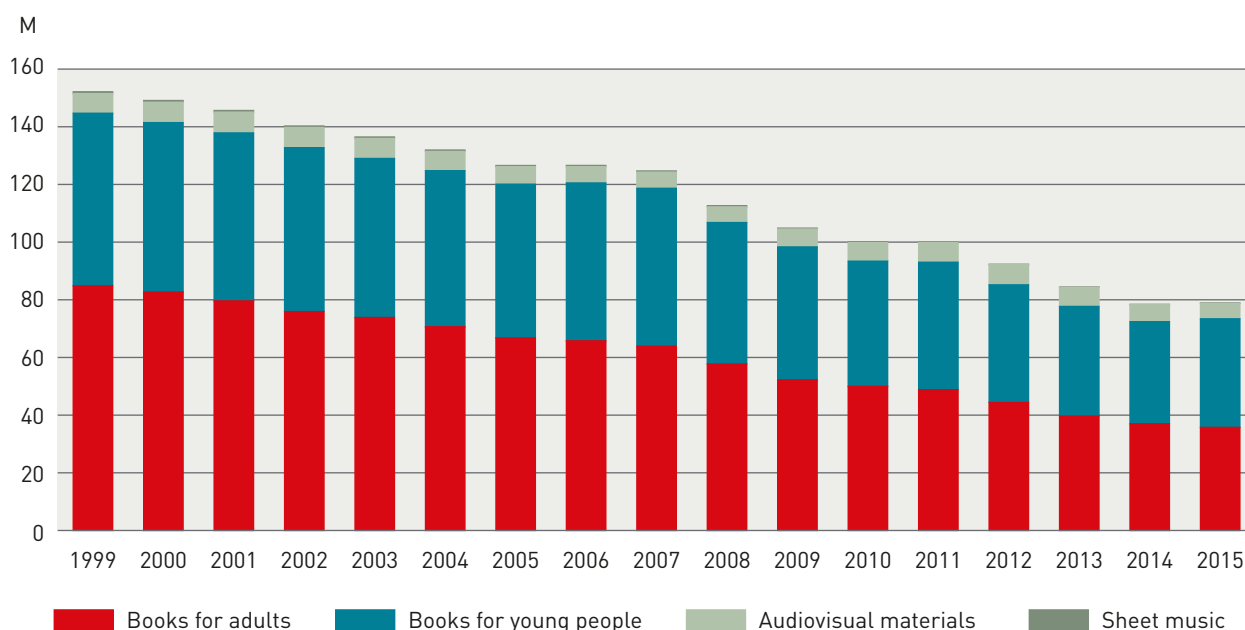
Public library membership in the Netherlands must be paid for, at least where adults are concerned. Most library bodies offer free memberships for children and youngsters, but those aged 16-17 often obliged to pay a fee. From the age of 18 (19 in Amsterdam), a full membership fee is required; the exact amount varying between library bodies and also dependent on the service level. Typically, libraries offer a choice between three membership options: a regular membership, a cheaper reduced version for occasional borrowers, and a more expensive top of the range version for library aficionados. As an example, in the public library of Amsterdam

Fig. 1: Registered public library users in the Netherlands, 1999-2015 (in millions)



Source: Statistics Netherlands (2016)

Figure 2: Volumes lent out by public libraries, 1999-2015 (in millions)



Source: Statistics Netherlands (2016)

the corresponding charges are €35 (€25 for 19-22 years and over 65s), €20, and €55 (€45 for 19-22 and over 65s). What is included in each of the membership versions depends on local conditions.

It is important, however, to stress that the Dutch public library system, as elsewhere, is financed largely by local, regional and national government. In 2015, subsidies constituted over 82 per cent of the total budget of public libraries (€519.4 mill.), whereas 12 per cent derived from membership fees (the remainder of the budget coming from regions, other grants and contributions, and recurrent statutory costs; the budget for the national e-book portal is not included in this sum). In other words, only one in every eight euro is paid for by registered library members.

National statistics reveal a considerable decline in the number of registered adult users, from 2.3 million (1999) to less than 1.5 million (2015). The number of children and youngsters (0-17 years) declined somewhat between 2000 and 2005, from 2.1 to 2.0 million. Since then, a steady increase has set in. Currently, 2.3 million children and youngsters are registered members, bringing the user total on $(1.5+2.3=)$ 3.8 million in a population of 17.0 million.

The material held in stock has also declined. In 1999, the total collection size numbered

around 43 million items, of which 25 million remained in 2015. Most significantly, the number of books lent out halved between 1999 and 2015; from 145 to 73 million.

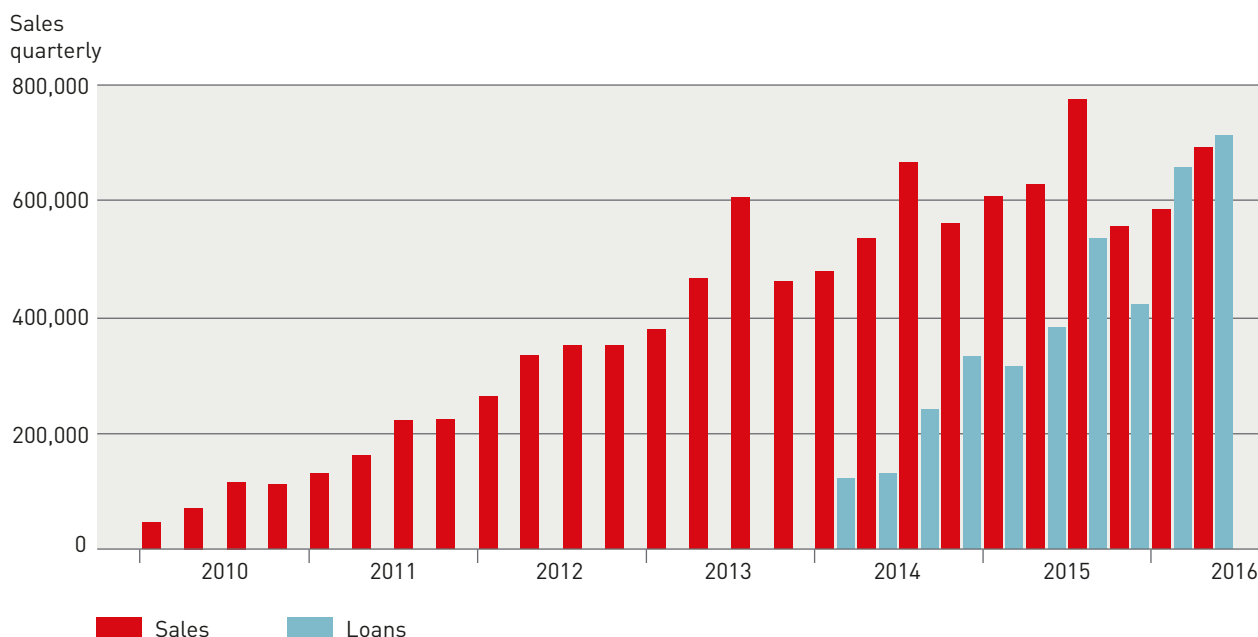
6.2 E-BOOK LENDING THROUGH PUBLIC LIBRARIES IN THE NETHERLANDS

6.2.1 The national e-book portal

The national e-book lending portal (<http://www.bibliotheek.nl/e-books.html>) was launched in January 2014. Registered users of the 156 public library bodies can set up an account on the portal with their membership number and start borrowing e-books. At the time of writing, some 11,500 e-book titles are available for borrowing, a number corresponding to 25 per cent of the commercially available titles. Recently published books are in short supply, yet titles that appeared 6 months ago or longer are commonly on offer. The titles that appear on the e-book shelf are subject to negotiations between the Public Library Association and the Royal Library on the one hand, and publishing companies on the other.

Since its launch, the number of registered users of the e-book lending portal gradually increased to 314,000 accounts on 1 July, 2016 (out

Figure 3: Quarterly sales and loans of e-books in the Netherlands



Source: CB (2016b)

of the 3.8 million library members who could register to the service at no additional cost). This is not to say that all the accounts are used. In the first half of 2016, 143,000 accounts were used actively (at least one book borrowed). In the first quarter of 2016, an average of 213,000 borrowings took place monthly, as opposed to a monthly average of 232,000 borrowings in the second quarter.

At the start of the e-lending portal, audiobooks were available. However, after the largest Dutch audiobook publisher withdrew its titles and started a commercial service, the portal ceased to offer audio books.

The amount to be paid to publishers varies, depending on such factors as whether or not titles are licensed in bulk or individually, whether or not an up-front payment (fixed cost) is required in addition to the per-lending fee (variable cost), and particularly whether it is a recently published title or one which has almost exhausted its commercial potential. According to a 2014 research report, the pay-per-loan licensing model in the Netherlands had the lowest average cost per loan of all European models studied (Mount & Huysmans 2014). Where this is still the case is uncertain. The Royal Library, which is now in charge of licensing negotiations, does not wish to disclose financial details, for obvious reasons.

6.2.2 The holiday library app

In addition to the national lending portal, in the summer of 2013 public libraries introduced the ‘holiday library’. After downloading an app, everybody – both members and non-members of one of the public libraries – can register and borrow and read a limited number of titles during holiday periods, especially during the summer months. This service proved very popular. In the summer months of 2015, 578,000 users registered, who together borrowed 2.25 million e-books. The amount needed to remunerate rights holders is covered by subsidy from the national government (Ministries of Education, Culture, and Science) through the Royal Library.

Both in terms of registered users and lendings, the holiday library app may be said to be more successful than the regular e-book-portal. In comparing these figures, one should bear in mind that borrowing e-books in the holiday library is free for everyone (17 million inhabitants) whereas the e-books in the national portal are only available to the 3.8 million library members. Furthermore, the figures do not give any evidence of the extent in which the downloaded books are actually read. It is conceivable that holiday library ‘members’ simply download all available books (in the summer of 2016: 30 books for adults and 30 for children) with the intention of selecting titles to read once the lender has arrived at the holiday destination. Likewise,

users of the regular e-book portal can download titles from the 11,500 titles on offer without ever finding the time to read them. Without further information about the access/download ratio of both models, drawing conclusions about the relative ‘success’ of these models is speculation at best.

6.3 PURCHASING AND BORROWING E-BOOKS: EVIDENCE FOR ‘CANNIBALIZATION’?

In developing e-lending models, the fear of rights holders that sales might be ‘cannibalized’ by lending has been an important factor. This fear is based on a series of assumptions including at least the three below:

1. profit margins on a sold title are higher than on a title lent out
2. persons borrowing a title will not buy that same title
3. despite protection measures (‘digital rights management’, DRM), titles lent out might be stripped of that protection by tech-savvy users and shared digitally on peer-to-peer platforms, or physically on USB sticks and CDs/DVDs

Although the assumptions are logical at first sight, there are also counterarguments suggesting that e-lending might be beneficial to rights holders in the short and long term:

1. through e-lending, a lot more readers may be reached by the same title, leading to an additional revenue stream.
2. persons borrowing a title may want to read more titles by the author, leading to borrowing and/or buying of other titles – which might otherwise not have been the case.
3. although copyright violations are a real threat to publishers’ and authors’ revenues, enhancing/promoting a culture of reading might in the long term result in the selling and lending of more titles, with additional revenues as a consequence.

Providing empirical evidence of the validity of the different arguments is extremely hard in real-life situations, as only in rare cases (quasi-) experimental situations arise that could settle the dispute once and for all. In practice, therefore, more often than not publishers and libraries find themselves in a difficult negotia-

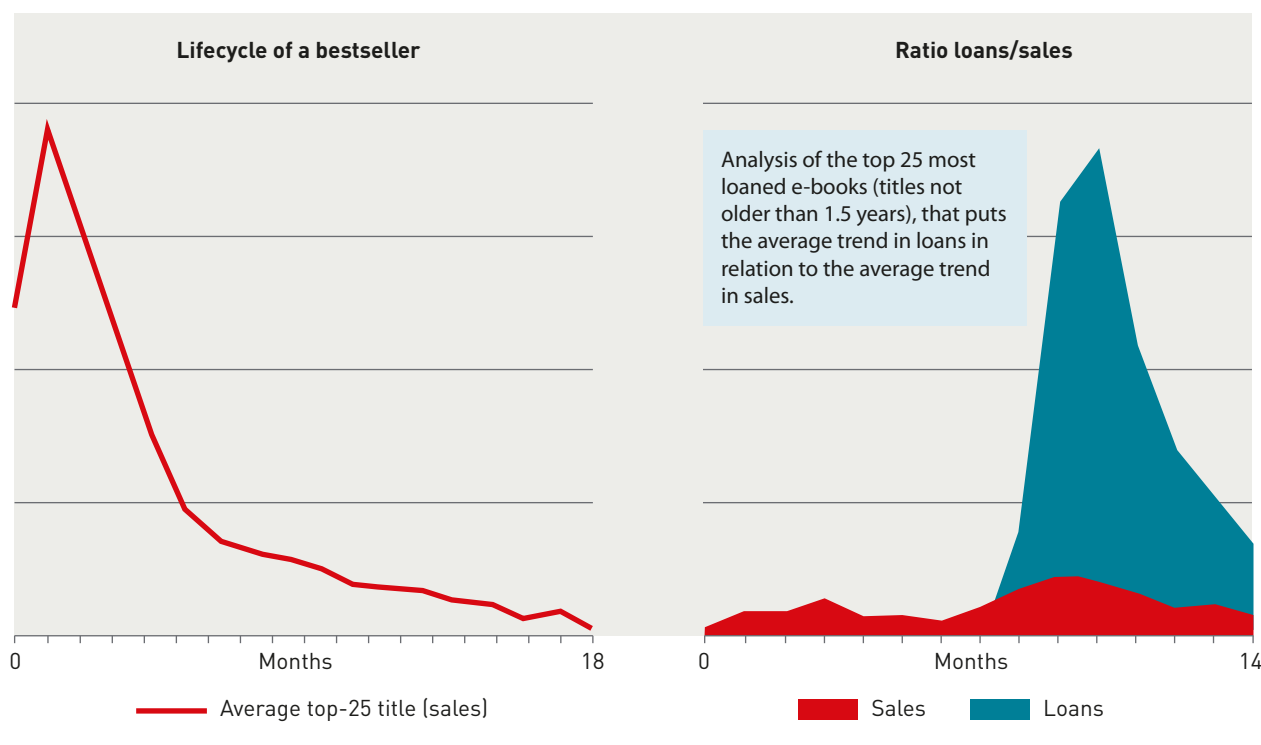
tion situation. The 2014 study mentioned earlier, comparing 19 e-lending models in European countries, Canada and the United States, paid attention to the possible conflict of interest between rights holders and libraries affecting the negotiations over an ‘ideal’ e-lending model. All in all, it appears that providing access to titles via e-lending is easier to achieve in the larger language communities (English, German) than in minor ones (see Mount & Huysmans, 2014; see also Mount, 2016).

For the Dutch e-lending portal, there is some evidence that the level of cannibalization is limited at best. The logistical service provider CB, the *de facto* monopolist in the Dutch market for selling, renting and lending e-books, stated in its 2016 Q1 e-book monitor: “loans have little or no negative influence on sales”. This is substantiated by three pieces of evidence:

- “A top 25 loaned book is on average 3 years old”, whereas a book from the sales top 25 has been published only slightly over 1 year ago;
- “In numbers, the top 100 sales are twice as big as the top-100 loans”
- “For both sales and loans, the large volume numbers come from the long tail” (CB, 2016a).

Convincing as these observations may appear, they point to the established situation only. Although some recent and bestseller titles are on offer in the public libraries’ e-lending portal, it should be borne in mind that it has proven easier for libraries to license older titles than newer and bestselling ones. Under the copyright regime in the European Union, publishers have the power to effectively block the inclusion of titles in the e-lending portal. This has led to two separate markets; one for sales (recent, best-sellers) and one for lending, which overlap only to a limited extent. (As was mentioned above, only 25 % of titles available in e-form are available in the e-lending platform.) Although from a financial/commercial point of view this situation has some logic to it, from a cultural perspective it is far from perfect. Public libraries strive for inclusion of every available title in the e-lending platform as a matter of principle, just as they have the right to do in the physical realm. A sound test of the cannibalization thesis, therefore, is not provided by the Dutch case. For that to emerge, it would be necessary to (temporarily) include a larger number of commercially viable

Figure 4: Lifecycle of sold and loaned books in the Netherlands*



Source: CB (2016b)

titles in the e-lending platform and see whether this impacts on the sales figures.

6.4 FUTURE DEVELOPMENTS

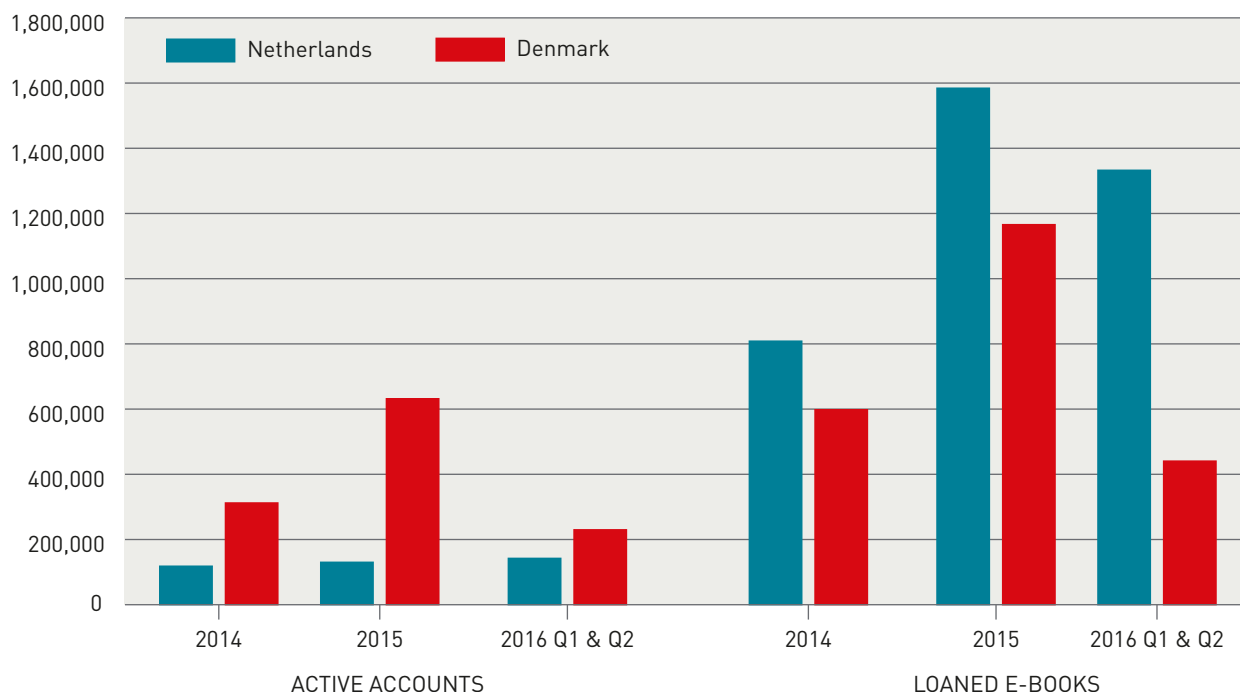
E-lending models, in the Netherlands, Denmark and elsewhere, are developing within a complex interplay of factors: political, economic, cultural and educational nature. It is therefore not very likely that a ‘one-size-fits-all’ e-lending model will emerge that can be applied to diverse socio-cultural contexts. A recent report of a working group established by the Directorate-General for Education and Culture (EAC) of the European Commission illustrates how local and global influences can affect reading promotion in general and e-lending in particular. Within the culturally and linguistically diverse context of the European Union, it might be advisable to create possibilities for diversity in e-lending models to cater for, e.g., linguistic and/or ethnic minorities (like for instance Italian speakers on the Istrian peninsula of Slovenia and Croatia) and global diasporas (like for instance the Estonian one (see European Union, 2016)).

A potentially very influential development is the opinion of one of the Court of Justice of the European Union’s Advocates General

on questions posed by the District Court of The Hague in a legal procedure between the Dutch Public Libraries Association (VOB) and the Dutch Public Lending Rights Foundation (Stichting Leenrecht). In his opinion, published on 16 June 2016, Advocate General Szpunar advised the CJEU to rule that the European Union’s Rental and Lending Rights Directive (Article 1(1)) must be interpreted in the sense of including the right to lend electronic books included in a library’s own collection (Szpunar, 2016). Whereas the *communis opinio* hitherto had been that e-lending should not be included under a public lending rights scheme (as has been the case in a lot of European countries for paper books), Szpunar holds that the directive, although it was not intended to include e-lending at the time of adoption, should co-evolve with the evolution of technology and could therefore include electronic lending as well as physical lending.

Should the Court of Justice of the European Union follow the AG’s opinion (probably later this year), this would principally enable the inclusion of e-books in the existing public lending rights schemes – if the member states would decide accordingly. The AG names a ‘one-copy-one-user’ model as a format that could serve that purpose, which in principle would enable

Figure 5: Comparing the Dutch and Danish e-book portals: active users and loans



* 2016: Jan-May. Sources: Koninklijke Bibliotheek (NL); eReolen (DK)

public libraries across the EU to include every digitally available title in their collections. Despite its limited user-friendliness as compared to the current Dutch ‘one-copy-multiple-users-model’, from an accessibility point of view this would be a step forward. For this to happen, however, a lot of political and legal discussions and negotiations will have to take place before the dust settles and a new era for e-lending begins.

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7 ■ IS A BALANCE NECESSARY? E-BOOK LENDING AND SALES IN SWEDEN

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7.1 INTRODUCTION

Digital books were among the first intellectual products to appear online when Michael S. Hart produced the first of their kind and created Project Gutenberg in 1971. They were also the last intellectual product to penetrate the digital intellectual products market; much later than periodicals, music or films.

As an avid reader, I read on digital devices and on paper. The difference between them is the same as reading lovingly crafted, high-quality, hardcover books as opposed to reading small script in paperbacks on low quality paper. Each has its place, its use, its cost, shortcomings and benefits. As a researcher, I find digital books a fascinating object of research, which seem to be a focus of both huge modern controversy and age-old conflicting interests, whether economic, social, creative or technological. E-books have highlighted the difference between producing and using digital texts in large-scale international and national minor language environments. They have also exacerbated the tension between a commercial product for sale on the one hand and an intellectual product, on the other that is a tool of enlightenment, democratization, and equality.

This short text is devoted to this latter tension between commercial and intellectual interests, and more precisely to how this issue manifests itself in Sweden, where it can be sourced to a conflict between e-book lending through public libraries and the commercial sale of e-books. The question is raised as to whether there is a clear one-directional dependence between e-book lending and commercial e-book sales and what kind of balance can be achieved between these two forms of book production and consumption. The paper is based on a variety

of scholarly research articles, investigation of media content and statistical data from several agencies, as well as results from the research project “E-books in a minor language culture”, financed by the Swedish Research Council (Vetenskapsrådet) and concluding in 2016.

7.2 THE E-BOOK DEBATE IN SWEDEN

Once you immerse yourself in the world of e-books, you see them everywhere and become aware of the major issues related to their production, distribution and marketing and then their use and consumption. However, this very focused kind of attention on e-books carries the danger of distorting the actual interests of the wider public in the topic, and professional or personal biases may also affect the importance that one attaches to certain aspects of the whole e-book phenomenon. Thus, I wanted to check how the actual interest in e-books in Swedish society is expressed in the mainstream media.

As a research tool, I chose the database ‘Artikelsök’ that logs and archives articles from the main Swedish newspapers and journals. In order to maintain a clear view across a large number of articles I chose to research articles published in the period 2013 – 2015, as 2016 has not yet come to an end. The database registered 1668 articles during these three years, out of which 107 contained my key word “e-books”. Some articles were false hits and all in all I found 93 articles (or about 6 %) devoted to this subject. This is roughly the same level as issues relating to databases (around 5 %), but much less than articles associated with books (53 %) or social media (33 %). Thus, one can conclude that the interest in e-books is not very high and

Table 1: E-book issues in Swedish media 2013-2015

Emne	Antal forekomster
Future of the book and the e-book	8
Technology and design of e-books	10
General policy issues (freedom of press, general copyright, other laws)	7
Market issues (market reviews, publishers' strategy, pricing, VAT)	8
Digital reading (including e-books for children)	13
E-books and digital learning material	6
Authors and e-books	5
Booksellers (Amazon and subscription services)	11
E-books in academic libraries	2
E-books in public libraries	23
Total	93

Source: Artikelsök

Table 2: Swedish media on e-books in public libraries (after Lasswell, 1948)

Element in the Lasswell's model	Matching data from Artikelsök
Who?	Librarians, policy makers, authors, a party leader
Says what?	Collaboration between libraries and publishers, 'Publit and Ordfront' (6); conditions of e-book usage in public libraries (5); solutions for libraries (5); library policy (4); Scandinavia (3)
In which channel?	Biblioteksbladet (10); SQL (2); Nya Argus (2); DN (2); Ordfront magazin, Dagens samhälle, BIS, Expressen, SvD, Avista, Svensk Bokhandel (one in each)
To whom?	Librarians, library leaders, policy makers, wider society

constitutes a much smaller element in terms of the general media interest in books.

Another interesting aspect relates to the issues that are explored in these articles. A rough content analysis shows that the topics discussed in at least ten articles relate to the technology and design of e-books, digital reading and bookselling including discussions relating to Amazon and on newly emerged subscription services. The future of the e-book, policy and legal or market-related aspects also attract moderate attention.

The discussions on e-books in libraries present a very interesting picture. While e-books in academic libraries are obviously not of inter-

est to the media, the issue of e-books in public libraries is the hottest topic of all, with almost twice as many articles as the second most popular topic – digital reading.

A classic communication model that a leading American communication theorist, Harold Lasswell, proposed as long ago as 1948 asks five questions concentrating on the act of communication: Who → Says what → In which channel → To whom → With what effect? (Lasswell, 1948, p. 37). If we look at the originators and sources of these library related articles, and the audience it addresses using Lasswell's model (leaving out the component of Effect) we see the following picture:

From the above, we see that the e-books in libraries discussion is dominated by the issues of relations between libraries and publishers and conditions of e-book use in public libraries. The topics attract the interest not only of library sector periodicals, which publish most of the articles, but also find their way into publishing sector periodicals and national general dailies or magazines. Most contributions come from the library community. This interest indicates the controversy around this issue and initiates a wider discussion and aroused passions of the interested parties; though these are more visible when searching for news on e-books in public libraries on the internet. Here a wider range of participants and opinions is met, which may indicate a symptom of some deeper conflict in society that has been stirred by the arrival of the new reading technology.

7.3 CHANGING RELATIONSHIPS, OR OLD CONTROVERSIES REKINDLED?

The debates between those who oppose or wish to limit access to e-books via public libraries are reminiscent of older arguments that blew up when the idea of public libraries supported by tax-payers' money, and providing free, unpaid access to the local community first emerged in the middle of the nineteenth century. These can be illustrated by the following excerpts from a 1849 debate prior to the 1850 Public Library Act (UK):

A question from the Chairman of the Select Committee:

“Do you not think that that course subjects publishers to great injustice: The members... have the privilege of using the author's book without any compensation for it, either to the author or to the publisher? If you were an author yourself, should not you think that injustice was done to you by having your books circulated gratuitously?”

A response by J.J. Smith formerly librarian of Caius College, Cambridge:

“That is one of the great uses of a public library, that you may be able to read books without the expense of buying. Many of those who use them could not buy... It cuts both ways: it brings a book into notice; it is a sort of advertisement, which the book would

not otherwise have. I imagine that if public libraries were increased in number, authors and publishers would derive great benefit, because the numbers of copies sold would be much greater and the number of readers generally much increased.” (Great Britain, Parliament, 1849, p. 152).

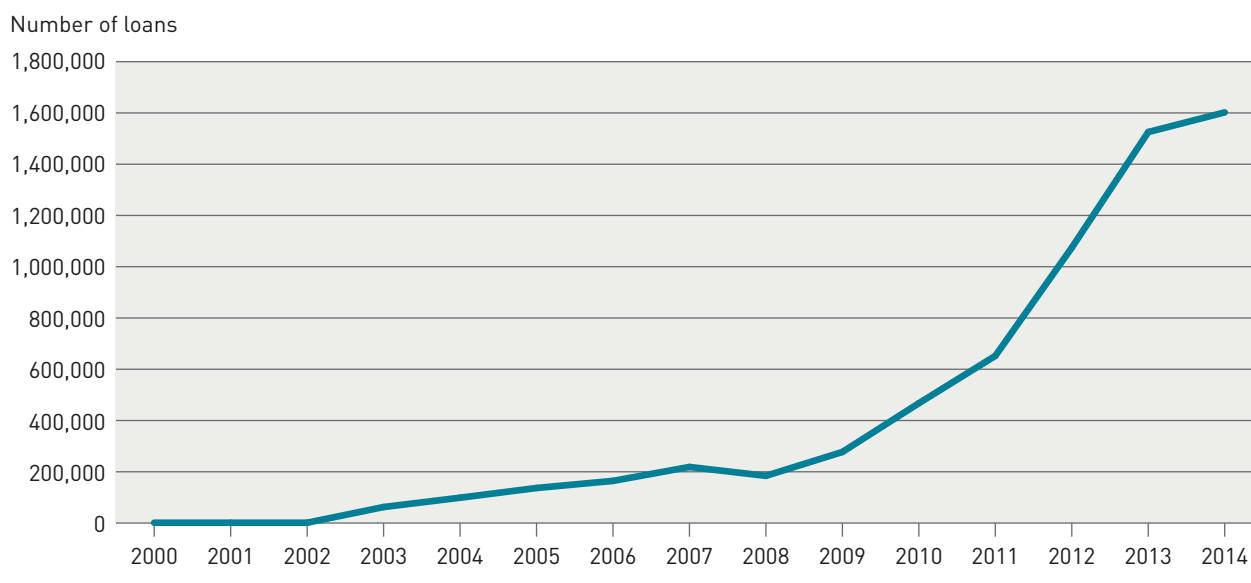
As we now know, the fears expressed by the Chairman of the Select Committee have diminished over the years as public libraries simply became a part of our existence. Reverend Smith was right – public libraries promoted books and reading in general and increased the number of book buyers. Those who bought books were library users and library borrowers still buy more books than others. According to the Pew Research Center, library card holders are more than twice as likely to have bought their most recent book than to have borrowed it from a library (Zickhur, Rainie, Purcell, Madden and Brenner, 2012). But the e-books phenomenon has revived the old controversy between the use of cultural and educational products that are totally free for the end-users and the commercial interests of their producers.

7.4 E-BOOK LENDING THROUGH PUBLIC LIBRARIES: EFFECT ON THE SWEDISH BOOK MARKET

Free access to e-books can be legally facilitated for those items that are not protected by copyright (usually older works or specific types of texts) or through channels that acquire e-books from the producers and offer them legally to their customers or members (libraries or other organizations). The end-users can also access e-books from unauthorized sources, which usually goes under the name of piracy, though different countries have different definitions of the actual actions by the relevant actors, and under which circumstances, that can be deemed to be illegal. Here we examine the legal distribution of Swedish e-books through public libraries.

Fig. 1 shows that e-book borrowing from public libraries has grown very quickly since 2009. However in 2015 it still remains a very small proportion of the total loans of public libraries in Sweden and is the equivalent of 2.3 % of total loans, as one can see from Table 3.

Fig. 1: E-book lending in Swedish public libraries 2000-2014. Number of loans



[Source: Royal library, public library statistics, June 2015. www.kb.se]

Table 3: Total loans and loans of e-books in Swedish public libraries in 2015

Loans	Number of items
Total loans in public libraries	64,988,462
E-book loans in public libraries	1,504,646*

Source: Royal library, public library statistics, June 2016.
Retrieved July 20, 2016 from http://biblioteksstatistik.blogg.kb.se/files/2016/05/2016-05-24_FOLKBIBLIOTEK.pdf. Note: *Includes also digital audio and talking books.

Table 4: Proportion of borrowed books to sold ones in 2015 in Sweden

	Number	Ratio
Total number of sold books	32,000,000*	2.0 borrowed to 1 sold
Sold number of e-books and digital audio books	1,335,000	1.2 borrowed to 1 sold

[Source: Sveska Förlaggarföreningen, 2016, p. 22].
Note: *Approximate number of total sales of new and backlist titles.

These figures seem to defeat the notion of negative affect of library loans on the sales of e-books because e-books constitute such a low proportion of borrowed books. If one considers the ratio of the books borrowed through public libraries and those sold as presented in table 4, the picture for the year 2015 does not show a negative effect of e-book borrowing on sales.

However, these proportions are changing over the years and many other factors affect the choices made by book readers. For example, the average price of an e-book in 2014 was 19 % higher (Wikberg, 2015) than in 2013 (when the sales were higher and library loans lower). Library loans in 2014 were marginally higher than in 2015 and significantly higher than in 2013. It may be that in 2014, the readers have turned to libraries for e-books because of this higher

price and so therefore the changes in book sales conditions have influenced library loans.

Regardless of statistical indicators, establishing any causal relationship between book (or e-book) loans and sales is very difficult and very few reliable studies have been conducted on any specific kind of relation between free access and the commercial sale of intellectual products. There is a tendency to account for commercial losses by measuring free loans or downloads of commercial products in monetary terms and treating the received figures as business losses. Of course, it is possible to measure the price of freely accessible intellectual products and reliable methods have been developed for this, but treating it as a simple, direct loss for business does not take into account the behaviour of consumers. Most of them, probably, may never consider buying anyway when the free supply

stops. Besides, in case of book reading, the loss of free access to the texts through libraries may result in negative effects for society and indeed the whole book trade, an idea that was quite clearly understood by publishers right up until the arrival of e-books.

The studies that are of interest regarding this issue are scarce. However, there is at least one pilot experiment in the UK that has raised the same question:

“How has e-book borrowing affected sales? Did borrowers go on to buy the books in the library catalogues, and were they more or less likely to buy e-books as a result of the availability of this free service?” (The Society of Chief Librarians and the Publishers Association, 2015, p. 3).

This study does not provide conclusive evidence, due to its limited scope in using only 893 front titles across four library authorities. As publishers were unable to locate e-book sales to particular areas, the impact on publishers’ direct sales or income could not be established. There was, however, more evidence about the behaviour of e-book borrowers. Participating libraries attracted only 4 % of new active borrowers and their e-book loans constituted only 5 % of total fiction borrowing, but this was focused on the latest, popular titles. E-book borrowers were wealthier than other library users and also enthusiastic e-book buyers from the start. Nevertheless, very few (only 1 percent) have clicked “buy” buttons next to pilot books indicating that e-lending will lead to few direct sales. Answering the questionnaires, users forecast their future behaviour:

“When asked about their future intentions, just under a third said they were less likely to buy e-books, but the same number said that they were neither more nor less likely to buy. Also the same was the number saying that they did not buy e-books anyway and the number saying that they intended to buy more e-books – 18 % in both cases. More than half of borrowers said that they would buy fewer e-books if libraries stocked a greater range for borrowing – and 22 % of them said that a greater range would encourage their e-book purchasing.” (The Society of Chief Librarians and the Publishers Association, 2015, p. 4).

Thus, the evidence is quite mixed, though it is more likely that their e-book buying behaviour will change than remain the same.

The inconclusiveness of the research results is also shown by related studies of piracy of intellectual products. A recent review of these studies was carried out by the Group for Research in Applied Economics (University of Warsaw). This referred to the literature measuring the impact of film and music piracy on sales and revealed the complexities and immeasurability of the outcomes (Hardy, Krawczyk, and Tyrowicz, 2015). After examining a large number of relevant studies from all over the world and conducting a regression analysis, the authors came to the conclusion that, on the whole, the literature “fails to reject the null hypothesis of no effects on sales” (Hardy, Krawczyk, and Tyrowicz, 2015, p. 1).

The same authors conducted a year-long, controlled, large-scale field experiment of the effect of internet piracy on book sales. It was designed to monitor the effect on both digital and printed book sales. There were two groups of titles: one consisted of strictly monitored pirated copies, which were removed as soon as they were detected by a specialized agency (blocking access), and one, which was not monitored at all. The sales of both groups were monitored and recorded over the year by participating publishers. The monitoring proved to be a very effective way of reducing piracy but had no effect on actual sales, either of printed or digital copies of books (Hardy, Krawczyk, and Tyrowicz, 2014).

7.5 THREATS AND OPPORTUNITIES

The e-book research group in Gothenburg and Borås universities was not trying to measure the direct impact of e-book lending on sales and the market generally in Sweden. Measuring becomes more and more complicated and causal effects are impossible to establish due to the increasing activity of subscription services and the lack of clarity on what actually constitutes an e-book purchase in the market at present. Instead the group examined how different participants express their attitudes to e-book lending through public libraries. Here are some excerpts illustrating different positions. Those who favour e-book lending are:

Small scholarly publishers:	"We are able to offer generous terms for libraries. Our product is such that we do not have Zlatan problems" (respondent refers to a popular book of a celebrity Swedish footballer "I am Zlatan", which was popular as an e-book in libraries).
Small consumer publishers:	"We are a small publishing house, fairly new. Nevertheless, libraries do not discriminate against us. They take all our books on board and distribute them widely, despite the fact that our authors are not well-known, despite the nature of our books".
Readers:	"I read only e-books and of course only from the library. I will go bankrupt if I had to buy all that"; "I do not buy books anymore. I am old and do not want to leave much stuff after me. E-books from the library are the best. I tried buying, but the ones I'd like to have are very expensive."
Independent authors:	"New arrangement with Elib (the main seller of e-books to libraries in Sweden) seems much better. I am not after big money. The most important thing is to get people reading."

The actors who have a critical view of e-book lending through libraries are:

Famous authors:	"When my books are available through the libraries as e-books I do not get royalties for them. That is obviously wrong."
Big publishers:	"The libraries have lost reading promotion role and serve entertainment purposes. The market has changed and becomes tougher, so we need all our sales and cannot afford losing them to libraries"; "It is, of course, a problem that lending is so large compared with e-book sales. E-books have no limitations for lending and we try to curb it".
Subscription services:	"It is difficult to compete with a 'free thing'."
Librarians	"The cost of e-books is too high and we run out of budget so that we need to stop e-book lending long before the end of the year".

All these actors are exhibiting several common features that can be seen as the biggest threats to the future development of the e-book. The first of them is fear of the unknown and the second is force of habit. Both push all the actors to curb the possibilities of technology in one way or another, so that e-books are treated like printed books. Two others are over-generalization and unrealistic expectations, expressed when the actors expect that e-books will have the same exaggerated effects in all publishing territories

despite ample evidence to the contrary. When this does not happen, scepticism or disappointment takes place of the former.

7.6 CONCLUSION

Under the circumstances described in the previous paragraph most of the actors behave irrationally. Publishers try to curb the potential of a product, for which there is still no demand and at the same time complain about the lack of the market for that product. 21st century industries should know by now that demand is created, it does not arise independently. Librarians spend disproportionate effort and attention on 3 % of book loans instead of using these resources for the more pressing needs of the communities they serve, or looking for alternatives to consumer e-books. The authors lose income, seemingly, through lack of lobbying and negotiating with the relevant actors. Copyright legislation, which ought to be a support tool for the whole system of publishing, lacks popular backing and respect because recent extensions of copyright terms benefit only major corporations and neglect consumers' and users' interests.

On the other hand, the digital nature of e-books is from time to time escaping unreasonable limitations as readers and users incorporate them into their lives and existing technologies. One such example is the increasing number of publishers who have stopped using hard DRM, mainly to meet the wishes of their loyal end-users.

If we regard the free market and ensuring equal opportunities for people as cornerstone values of our societies and fully and freely informed citizens capable of making decisions as a precondition of a democratic society, then the debates about e-books in public libraries and developments in the book market stop being simply a matter for the book sector alone or a problem for a particular society in a particular moment. Innovations, social or technological, are affected by our societal as well as cultural systems. Finding the right balance for the e-book phenomenon is rather difficult for a number of reasons. The questions of what kind of balance needs to be answered first. Balance between commercial and public interests, or balance that achieves the best economic outcome for the whole of society? How is this to be done and who will calculate that balance? Besides,

there are also differences amongst publishers over e-books, not only differences but downright opposition as well. Competition is at work and is a factor amongst commercial booksellers who are becoming more numerous and varied. Furthermore, non-profit and public distributors are different in nature and pursue different ends; libraries are just one of those bodies. Authors are drastically divided on the issue of modern publishing. Measuring everything by the interests of trade and consumer literature publishers and following big media business wishes, as is happening in the copyright area, is absurd and leads to dangerous distortions. Would it not be more useful to put in place many checks and balances without trying to achieve one universal solution for everything?

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the 1990s, the number of people in the world who are under 15 years of age has increased from 1.1 billion to 1.5 billion. The number of people aged 65 and over has increased from 200 million to 350 million. The number of people aged 15–64 years has increased from 1.5 billion to 2.1 billion.

There are a number of factors that have contributed to the increase in the number of people in the world who are under 15 years of age. One of the main factors is the increase in the number of people who are surviving into old age. This is due to a number of factors, including improvements in medical care, better nutrition, and a decline in the number of people who are dying from infectious diseases.

Another factor is the increase in the number of people who are having children. This is due to a number of factors, including a decline in the number of people who are dying from infectious diseases, a decline in the number of people who are having abortions, and a decline in the number of people who are using contraception.

The increase in the number of people in the world who are under 15 years of age has a number of implications. One of the main implications is that it will increase the demand for resources, such as food, water, and shelter. This will put pressure on the environment and on the world's resources.

Another implication is that it will increase the demand for education. This will put pressure on the world's education system and on the world's resources. It will also put pressure on the world's economy, as it will increase the number of people who are dependent on others for support.

The increase in the number of people in the world who are under 15 years of age is a major challenge for the world. It is a challenge that will require the world to work together to find solutions. The world must find ways to meet the needs of the growing population, while also protecting the environment and the world's resources.

The world must also find ways to ensure that everyone has access to education and healthcare. This will require the world to work together to find solutions. The world must find ways to ensure that everyone has access to the resources they need to live a good life.

The world must also find ways to ensure that everyone has access to a decent standard of living. This will require the world to work together to find solutions. The world must find ways to ensure that everyone has access to the resources they need to live a good life.

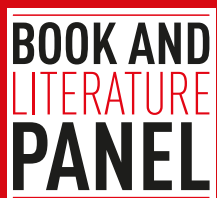
The world must also find ways to ensure that everyone has access to a safe and secure environment. This will require the world to work together to find solutions. The world must find ways to ensure that everyone has access to the resources they need to live a good life.

The world must also find ways to ensure that everyone has access to a peaceful and stable world. This will require the world to work together to find solutions. The world must find ways to ensure that everyone has access to the resources they need to live a good life.

The world must also find ways to ensure that everyone has access to a world that is free from poverty and hunger. This will require the world to work together to find solutions. The world must find ways to ensure that everyone has access to the resources they need to live a good life.

The world must also find ways to ensure that everyone has access to a world that is free from conflict and violence. This will require the world to work together to find solutions. The world must find ways to ensure that everyone has access to the resources they need to live a good life.

The world must also find ways to ensure that everyone has access to a world that is free from discrimination and oppression. This will require the world to work together to find solutions. The world must find ways to ensure that everyone has access to the resources they need to live a good life.



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