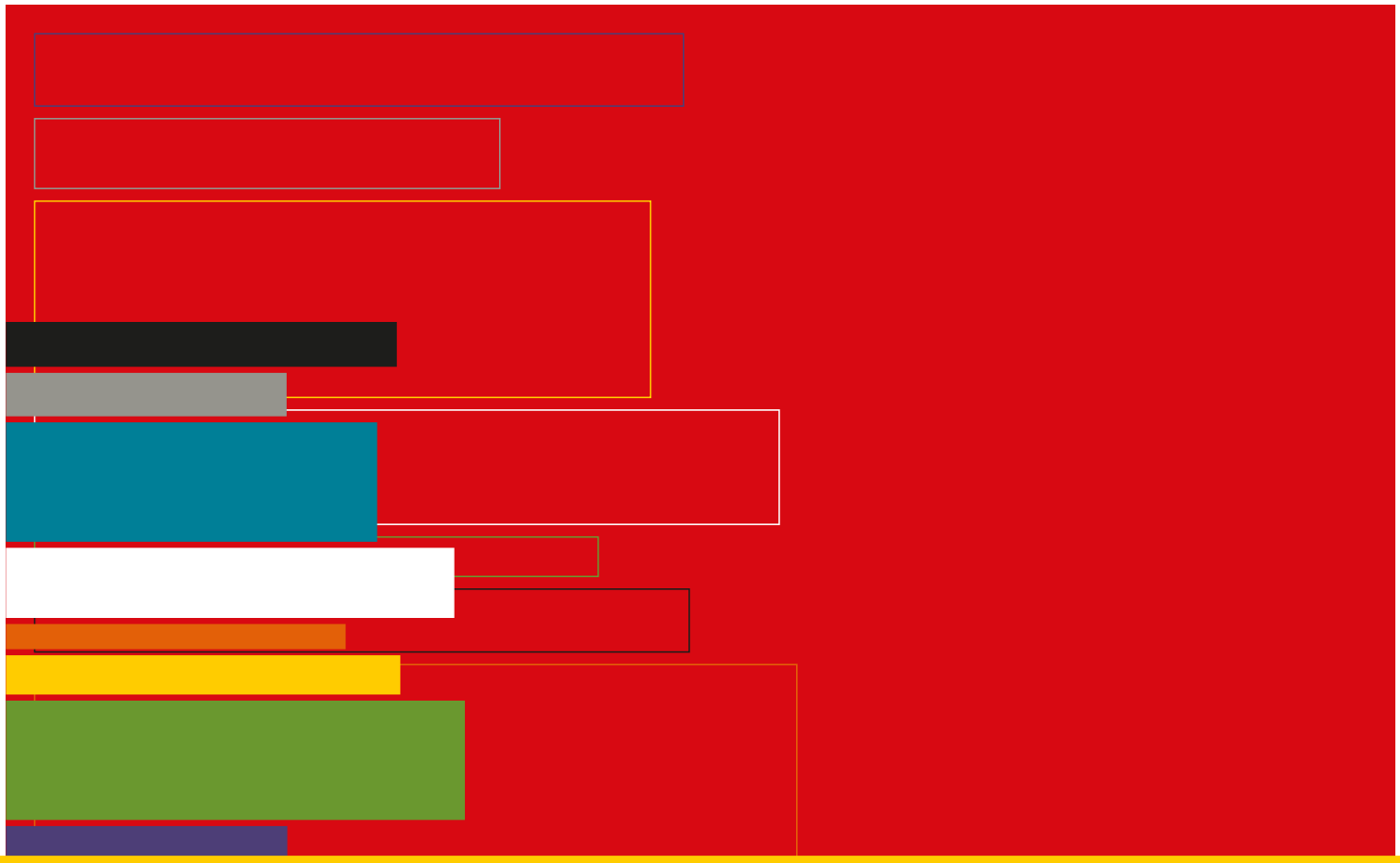

BOOKS AND LITERATURE 2015

BOOK AND LITERATURE PANEL

ANNUAL REPORT OF THE BOOK AND LITERATURE PANEL

BOOKS AND LITERATURE

2015

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BOOK AND
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PANEL

Books and Literature 2015

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CONTENTS

1. LITERATURE AND TRENDS IN A CHANGING BOOK MARKET

Literature, both fiction and non-fiction, is a source of information and entertainment, and enhances our understanding of culture and art. The book is literature's most important medium. Financial, technological and policy frameworks all exert influence on the volume and types of literature that are written, published, sold and read by Danish consumers.

This first annual report by the Book and Literature Panel sheds light on these frameworks and resultant trends. This is important because it is the first overview of its kind of the book market and the state of literature in Denmark, and because there have been substantial changes in the Danish book market in recent years, partly in response to developments in the international book and media market.

As ever, change generates both anxieties and hopes – for example, whether market-led thinking will reduce the diversity and quality of literature available or, conversely, whether the internet will allow us all access to a cornucopia of books at very low prices. Such feelings may well be legitimate and understandable, but the knowledge base is as yet insufficient to determine the extent to which they are justified. This report constitutes the Panel's contribution to a better and more informed basis for policy discussions on the state of the book and literature market in Denmark compared to trends elsewhere.

Overall, the Panel has identified three important trends in the Danish book market over the last two decades: *liberalisation, digitisation and globalisation*. Since 2000, the Danish book market has gradually been liberalised, and since 2011 the price of books has not been regulated. As a consequence, competition on price has increased, and far more books are now sold in places other than traditional physical bookshops, e.g. supermarkets and online. Among other considerations, greater price competition has led to discussion about the significance of bestsellers in the book market, particularly with regard to crime fiction, and provided customers with the opportunity to compare book prices from different sources. This has triggered concerns about the range of new Danish literature: if attention is concentrated on a few major titles, the diversity of literature could suffer both on the supply side (diversity of titles produced) and on the consumer side (what is read). The book also faces competition from an ever-growing and mainly commercial range of different media, which has given rise to fears that book-reading by Danes *per se* is under threat.

Digitisation has altered the book's traditional journey from author to publisher to bookshop to reader. For a long time, e-books were a marginal phenomenon in the Danish book market. In recent years, however, this has changed. E-books have begun to play a serious role, both in terms of publishers' revenues and in readers' lives. The internet has offered new opportunities for book distribution as well as for communication between authors, publishers and readers. Digitisation has also made it easier for authors to circumvent established publishers and booksellers, and instead publish their own books. Self-publishing is not a new phenomenon, but the Internet has generated new opportunities for the distribution of both physical and digital books – and the e-book as a medium eliminates printing costs, rendering the need for print runs and stocks of books redundant. Digitisation has also opened up the market to new players who are using technology both to create new business models and to generate new ways of producing and reading books. An example of this is the online book dealer Saxo.com. In addition to selling both printed books and e-books, Saxo.com offers a range of services designed to make

it easy for authors to publish their own works. Another of the new digital players is the subscription service *Mofibo*. Instead of selling books individually to readers, *Mofibo* offers a digital library of books available by monthly subscription. Digitisation has also changed the character of public libraries, with the Danish library e-book collection (called *eReolen*) becoming an important part of library lending. The internet also gives libraries new opportunities for contact with readers in terms of providing information and encouraging debate about literature and culture.

Globalisation has also made its mark. Whilst Danish writers, publishers and booksellers continue to play a key role in the Danish book market, an array of external global players now also exert an influence. Google and Apple offer online access to certain books, and search engines are now crucial to the way in which booksellers connect with readers looking for a particular book. Amazon has revolutionised the book trade in the US and the UK, setting new standards for distribution, prices and working conditions for staff in the industry. It has gained ground in certain European markets in recent years, but Danes are still unable to buy books in their own language from Amazon. Although these global players do not yet sell significant numbers of Danish titles, they nevertheless have an effect on standards regarding the market, law and technology in Denmark. Some fear these players, while others see them as role models for the future not only of the trade, but of the book itself.

These various trends may have different and opposing consequences for the supply and demand of fiction and non-fiction. This first report aims to shed light on certain aspects of the situations for books and literature in Denmark. Other aspects will be explored in subsequent annual reports. This year, the report focuses on providing a broad and clear statistical description of the production, distribution and consumption of literature and books. It highlights two particular trends: alternative forms of publishing and the globalisation of the market. The rest of this introductory section summarises the main trends identified in the report.

MORE NEW DANISH FICTION IN PRINT

The report details overall growth in the number of books published in Denmark. In 2014, a total of 11,340 books (printed and e-books) were published, up from 10,784 the previous year. The number of new printed fiction titles in Danish is also up: from 1,040 in 2010, to 1,223 in 2013 and 1,365 in 2014. The number of new printed non-fiction titles in Danish fell from 2,254 in 2013 to 2,151 in 2014.

The number of new, translated works of fiction in print has only fluctuated slightly over the years, from 1,288 in 2010 to 1,344 in 2014. The number of new, translated works of non-fiction has fallen slightly, from 835 in 2013 to 815 in 2014. A significant number of all translations were of British and American titles (709 fiction and 543 non-fiction printed first editions in 2014). However, there were no indications in the period 2009–2014 that the proportion of translations into Danish from English had increased. Swedish, French and German titles are also translated relatively frequently.

See Section 2.1 for more details.

MORE E-BOOKS MEANS MORE ROOM FOR SMALL PUBLISHERS AND POETRY

The number of new e-books published, both fiction and non-fiction, rose from 2,497 in 2012 to 3,694 in 2014. As well as general growth in the e-book market, the re-release of older literature in e-book format may be a contributing factor to this increase, as it allows publishers to make their existing back catalogue relevant in a digital world and is an inexpensive option for republishing older works that are out of copyright. The growth in commercial e-book fiction is in novels, short stories and poetry. Translations make up a smaller proportion of the e-book market than they do for printed books. Translated fiction accounted for 36.7% of e-books in the period 2012–14, while the corresponding figure for printed books, in the period 2009–2014, was 52.5%.

E-book publishers include a number of smaller and less well-known companies, several of which publish (almost) no printed literature. It is also worth noting that Danish poetry has found an important outlet in these less well-known publishers, including digital and self-publishing companies and co-publishers.

See Section 2.1 in the report for more details.

PUBLISHERS EMERGING FROM CRISIS

Danish publishers have seen their revenues rise for the first time in seven years. Although 2013 and 2014 were broadly similar there were some minor variations between genres. In particular, there has been an increase in revenue from digital publications. This is not only due to higher sales of e-books, but also reflects the growth in digital teaching aids in schools. Revenue from non-fiction has declined slightly, by 1.2%. Revenue from fiction remained virtually unchanged compared to 2013.

Sales by publishers to physical locations where books are sold fell by 1.5% from 2013 to 2014, while sales to online bookshops soared by 18.6% in the same period.

See Section 2.3 for more details.

NEW INFORMATION ABOUT SELF-PUBLISHERS

The traditional publishing industry has been supplemented by a number of new players. Various forms of self-publishing and co-publishing have gained a foothold – poets, in particular, now often publish their own work. A study of alternative forms of publication conducted by Nils Bjervig on behalf of The Book and Literature Panel shows that:

- self-publications accounted for 15% of book production in 2013 and 2014
- the proportion of self-published books in print was 12% in 2013 and 11% in 2014
- the proportion of self-published e-books was 22% in 2013 and 21% in 2014.

A questionnaire survey of Danish self-publishers (part of the study) revealed that:

- 59% of those who self-published cited creative freedom as the main reason they opted for this approach; 43% cited financial reasons; 38% cited rejection by traditional publishers
- 26% named 'author' as their main occupation; 50% said writing was a secondary occupation; 24% called it a hobby
- 46% had previously been published by traditional publishers, including 73% who stated that writing was their main occupation.

In addition to mapping alternative publishing channels, the findings suggest that it is no longer tenable to maintain a clear distinction between traditionally published titles on the one hand and alternative, self-published titles on the other. There are a variety of hybrid forms that lean more or less towards either the publisher's side or the author's. A number of companies act as traditional publishers, but also provide services to self-publishers. For example, the online book dealer Saxo.com sells traditional publications, but also helps authors self-publish. For many different reasons, some writers who are published by established publishing houses also choose to self-publish through their own company or similar means.

FEWER HARD COPIES, MORE E-BOOKS IN LIBRARIES

In the period 2009–2014, books accounted for 59–64% of libraries' total expenditure on materials. Over the last three years, spending rose slightly on materials (both in total and on books as an item), following a fall in book spending during 2000–2011. However, once inflation is taken into account, the fall is actually even sharper, which illustrates the fact that the purchasing power of public libraries is declining.

Over the last 14 years, the stock of printed books held by public libraries has been falling steadily, by a total of 41.8%. This smaller stock is not matched by a corresponding fall in spending on books, due to a combination of higher spending on digital materials and declining purchasing power.

In the early 2000s, the number of printed books lent out by libraries and the stocks of books fell at broadly the same pace. However, after 2006, stock levels began to decline significantly faster than lending. On average, books are more frequently borrowed from public libraries now than they were 13 years ago. The number of printed books lent per capita of the population fell from 5.83 in 2009 to 4.87 in 2014.

Conversely, the libraries' e-book service, *eReolen*, has grown significantly, both in terms of the number of titles available and the number of loans. In July 2015, 126,414 e-books and 150,992 online audio books were borrowed. While digital lending is clearly growing, physical loans still dominate. In 2014, approx. 98% of library loans were in hard copy, only approx. 2% were via *eReolen*.

See sections 2.3 and 2.4 for more details.

LIBRARIES PREFER NOVELS

The proportion of novels in libraries is three times that of the proportion in total book production. Fiction for adults accounts for the majority of the books (by title) bought by libraries. Conversely, non-fiction for adults accounts for a large proportion of total book production but a smaller proportion of books in libraries. The proportion of translated literature in libraries has remained fairly stable, at around 40% of the titles published in 2013 and 2014.

Libraries mainly purchase books from established publishing houses, in particular those that produce titles for children and young people. Self-publishers and co-publishers find it more difficult to make inroads into libraries.

See Section 3 for more details.

GENDER, AGE AND EDUCATION AS FACTORS IN READING HABITS

There are clear gender differences when it comes to reading fiction and non-fiction books. Almost 50% of women read fiction once a week or more, compared to just under 30% of men. Conversely, men read more non-fiction than women, although the difference is not so great (36.6% of men and 32% of women once or more a week in 2014). The number of Danes reading non-fiction in 2014 was higher than 2010, but the regularity with which they read has remained fairly stable for both genders over the last five years. The numbers reading e-books have risen. In 2014, almost 2/3 of the adult population said they had never read an e-book, but 8–9% said they did so at least once a week.

Age and education are clearly factors with regard to reading habits. In general, older people read fiction more frequently, while a section of the younger population never does so. Conversely, younger people read more non-fiction than the oldest age groups, which may be because non-fiction titles are often associated with education. The report also shows that people with no educational qualifications or only a short-cycle education are more likely to be non-readers than those with a medium-cycle or long-cycle higher education. This correlation is more pronounced in younger age groups than in older ones.

See Section 2.4 for more details.

SALES STATISTICS AND BETTER READING STATISTICS NEEDED

Statistics for the number of books sold in Denmark (by title) are not currently collated. The Panel looks forward to the pilot project being run by Statistics Denmark, which will collate information about book sales in supermarkets. It will also work with Statistics Denmark to find ways of making the project permanent and possibly also extending it to other booksellers. In addition, digital advances provide new options for collating far more detailed statistics about sales, lending and reading at a much earlier stage. These techniques should be incorporated into data-acquisition methods in the future.

The statistics about reading that are currently available do not include sufficiently detailed information about the types of books and literature favoured by, or the factors that influence reading habits in, different population groups. The Panel will strive to identify opportunities for establishing greater standardisation and consistency in the reading statistics.

See Section 4 for more details.

DIVERSITY IN THE BOOK MARKET?

When evaluating the book market, a key parameter is the question of diversity in production, distribution and consumption. Generally, the report's findings indicate some growth in the number of new titles by Danish authors in the last five years.

British and American publications account for many of the translations published in Denmark, but the proportion of these has not increased. Many books from other countries are also translated, in particular books from Sweden, Germany and France.

Digital publishing and alternative channels seem to be particularly popular among traditionally niche genres, e.g. poetry.

Although the statistical data in this report is unable to provide a sufficiently detailed picture of the different genres, its findings do give rise to cautious optimism about the range of books

available, despite the slight decline in the number of non-fiction titles.

However, the data for distribution and consumption is inconclusive when it comes to diversity. In terms of distribution, diversity is a question of the visibility of the range of available literature, e.g. in bookshops, online and in libraries. It is, in principle, possible to search for any literature online, but that does not mean that all literature stands an equally good chance of being discovered by potential readers. Bookshop displays and search-engine algorithms are often based on popularity, which therefore excludes more specialist titles or titles without a big commercial appeal.

In terms of consumption, it is difficult to say anything conclusive, as there is not enough information about what and how people in Denmark actually read, including which genres. The statistics in this report indicate that diversity of availability is not in itself sufficient to generate diversity in consumption. Rather, gender and education appear to be the main factors that influence the choice between reading fiction or non-fiction, or not reading at all. The challenge is, therefore, not only to increase visibility and access, but also to promote reading in general.

This report represents a first step towards collating suitable statistics and annual reporting on books and literature in Denmark. Many questions currently remain unanswered, but better statistics and future analyses will address this situation.

Book and Literature Panel, 23 September 2015

Chairperson, Professor Stig Hjarvard (Department of Media, Cognition and Communication, University of Copenhagen)

Associate Professor Ann Steiner (Centre for Languages and Literature, Lund University)

Professor Anne-Marie Mai (Department for the Study of Culture, University of Southern Denmark)

Associate Professor Gitte Balling (The Royal School of Library and Information Science, University of Copenhagen)

Associate Professor Rasmus Green (Department of Communication, Aalborg University)

Kjell Bohlund (Publishing consultant and former CEO of the Norstedt Group)

Rasmus Rex (PhD student at Roskilde University conducting researching into digital media consumption)

Associate Professor Tue Andersen Nexø Department of Arts and Cultural Studies, University of Copenhagen, and reviewer for the newspaper *Information*)

2. MAPPING THE EXISTING BOOK MARKET STATISTICS

The terms of reference[1] for the Book and Literature Panel include monitoring trends in the book market by collating available statistics every year. The Panel has conducted a mapping exercise that illustrates the three phases of a book's 'life cycle': *production*, *distribution* and *consumption*.

As far as *the production phase* is concerned, the Panel has looked at the number of books published in Denmark, including how this has evolved since the turn of the century. It has subsequently broken the data down into genre, (original) language and format (print or e-book). This allows the panel to determine how many books are available to readers and assess the degree of diversity.

Books can only be published if there are authors to write them. The Panel has used data for public lending fees from libraries to estimate the number of authors active in Denmark.

The *distribution phase* covers the process of making literature available to readers, i.e. after the author has passed their work to others in the chain.

It is also helpful to understand the distribution process, as it provides insight into the conditions under which literature is published. This report explores sales figures for the Danish publishing industry. Publishers are (still) very much the main conduit between authors and readers, which makes the financial state of the industry a key indicator of the state of the Danish book market.

Public libraries also play an important role in making literature available to readers, which makes them an important part of the distribution phase. The Panel looked at lending data for both printed books and e-books.

The *consumption* phase is about how readers encounter literature: How many books do people buy and read? Which ones do they choose? To shed light on these questions, the Panel also looked at the number of books borrowed from libraries and at general trends in reading habits.

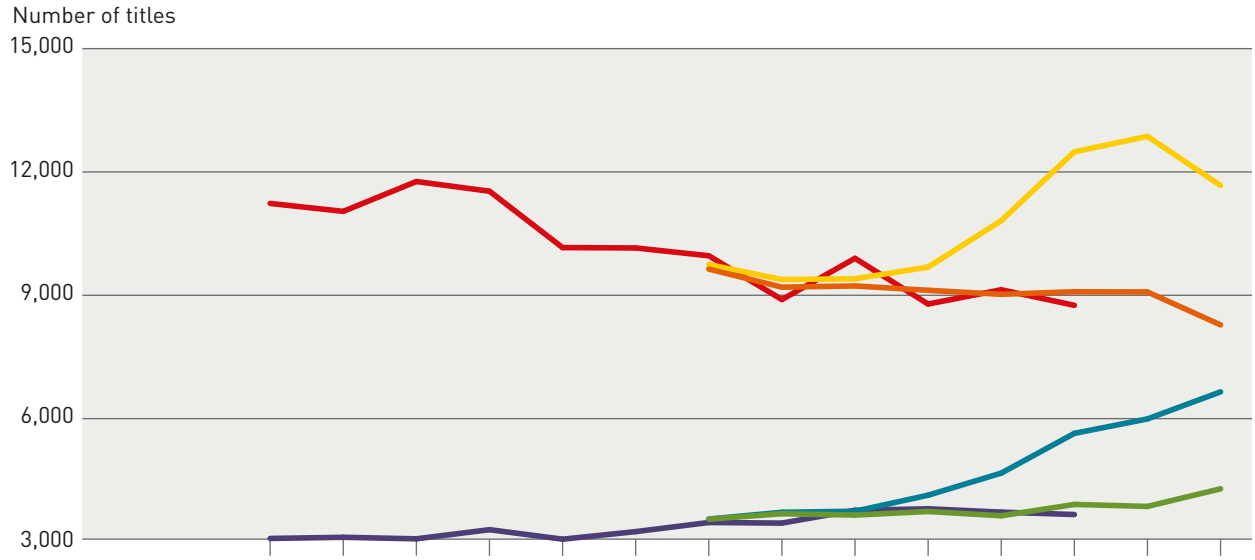
In practice, there are areas of overlap between the three phases, but distinguishing between them is useful for analytical and statistical purposes and highlights some of the salient points about the path from author to reader. It also facilitates a mapping exercise of the available statistics.

The following is mainly based on data from Statistics Denmark, annual statistics from the Danish Publishers' Association (DPA) and statistics for libraries. These three sets of statistics provide a substantial amount of data with which to illustrate the *production*, *distribution* and *consumption* phases.

As well as the production statistics, the report also refers to previously unpublished data that illuminates, for example, market share per publisher for print and digital publications. The Panel cross-referenced book-production statistics with information about the fees paid by libraries for public lending rights, in order to determine the volume and nature of the literature purchased by libraries. The Panel also obtained access to previously unpublished data on reading in Denmark, meaning that this report contains the most up-to-date figures available about the consumption of fiction and non-fiction in Denmark.

[1] See 7.1

Figure 1: Total book production 2001–2014.



	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Fiction – in total (DLC)	3,085	3,113	3,076	3,298	3,067	3,251	3,473	3,458	3,770	3,806	3,725	3,667		
Non-fiction in total (DLC)	11,234	11,041	11,767	11,531	10,160	10,151	9,961	8,896	9,899	8,787	9,134	8,756		
Fiction – incl. e-books (SD)							3,557	3,721	3,747	4,137	4,674	5,641	5,992	6,651
Non-fiction – incl. e-books (SD)							9,747	9,383	9,401	9,686	10,814	12,489	12,866	11,671
Fiction – excl. e-books (SD)							3,554	3,686	3,654	3,740	3,637	3,912	3,864	4,292
Non-fiction excl. e-books(SD)							9,636	9,197	9,227	9,121	9,024	9,086	9,081	8,280

Source: DLC (2001–2012) and Statistics Denmark, book production statistics BOG02 (2007–2014).

2.1 PRODUCTION OF LITERATURE

The number of non-fiction titles in print has fallen steadily in recent years, while the number of new Danish fiction titles in print has risen from 958 in 2009 to 1,365 in 2014. The number of British and American titles translated into Danish is slightly lower than it was six years ago.

The statistics compiled by Statistics Denmark for the Ministry of Culture, based on data provided by the Danish Library Centre (DLC) for the period 2007–2014, form the best starting point for a study of book production in Denmark. The data is uniform and consistent, but it postdates the period in which the Danish book market was gradually liberalised (2001 onwards). DLC also published these statistics until 2012, so the two sources overlap from 2007 until 2012.

The book production statistics report on all published material registered in the Danish Book Catalogue, i.e. including publications not intended for the commercial book market.

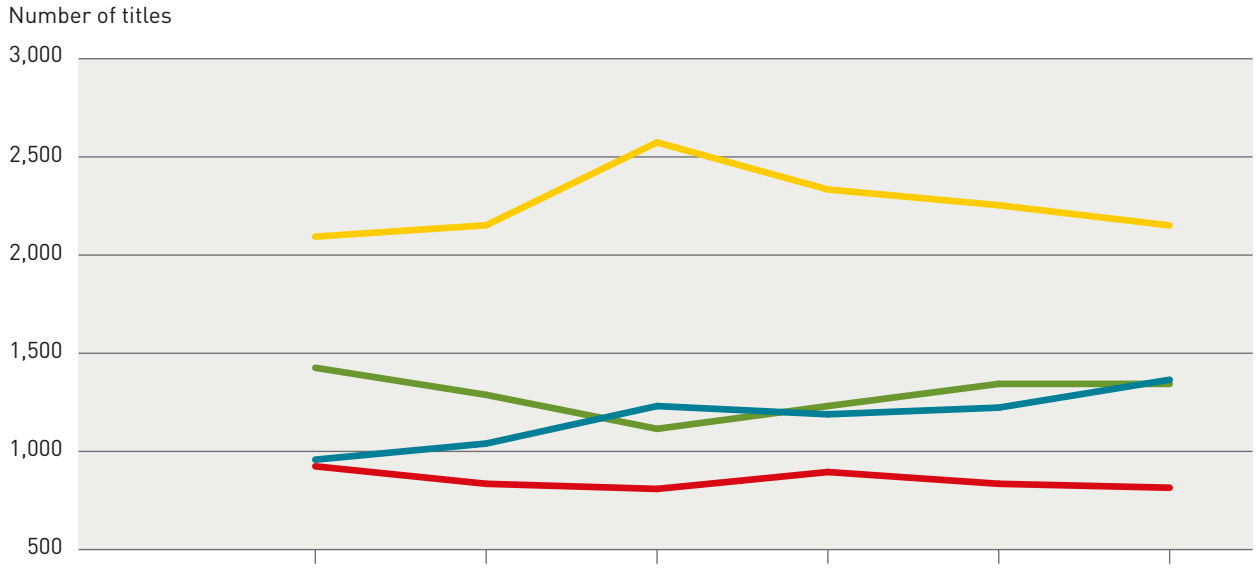
The data is based on library catalogue entries identified by their *FAUST* numbers (a unique number assigned to each publication in the Danish Book Catalogue). As such, the statistics do not reflect the number of titles published, but the number of publications.

Figure 1 shows combined data from the DLC and Statistics Denmark. Data for 2007–2012 is available from both sources. Figure 1 shows that if the figures for e-books are removed, the data is comparable, despite differences in methodology. However, the DLC statistics are based on the year in which a publication was registered, while Statistics Denmark uses the year of issue.

Both methods show approximately the same trends and numerical values for book production in the overlapping period, and thereby provide a basis for the comparison of data between 2001 and 2014.

The illustration above shows all fiction and non-fiction registered in the period 2001–2014, and reveals a decline in the production of non-fiction in print format. This may be because

Figure 2: Commercial printed first editions, Danish and translated titles.



	2009	2010	2011	2012	2013	2014
Fiction in Danish	958	1,040	1,231	1,189	1,223	1,365
Non-fiction in Danish	2,094	2,152	2,574	2,334	2,254	2,151
Fiction – other languages	1,426	1,288	1,115	1,231	1,344	1,344
Non-fiction – other languages	924	835	809	895	835	815

Source: Statistics Denmark, book production statistics BOG06.

annual publications and reports not intended for the commercial market are increasingly being published exclusively in digital formats, and are therefore counted as e-books. However, the figure for all non-fiction (print and digital) fell for the first time in 2014. Conversely, the number of printed fiction titles has risen in recent years. In the following part of the report, fiction and non-fiction refers to commercial literature, including books for children and schools.

2.1.1 Production of print books

Figure 2 shows the figures for commercial publishing, and represents the subset of the book production statistics that is most useful for identifying trends in new printed titles for the Danish market. In principle, this restricts the study to trends in books intended for the retail market. The trends for fiction and non-fiction identified in the previous table recur, but are less prominent, because the data only covers first editions for the commercial market. Since 2014, it has been possible to correlate the data presented in the table with information about the original language of publication. Please note that the following summary also includes children's books.

The commercial data reveals a steady increase in the number of fiction titles written in Danish in recent years. The corresponding figure for non-fiction has fallen every year since 2011, although it should be noted that it has not dropped below the 2009 level. The figures for translated fiction fluctuate somewhat, and for translations of non-fiction, the trend is for a slight fall in the number of titles.

As mentioned above, Statistics Denmark's new methodology now makes it possible to extract data about the original language of the majority of the titles in print (see Figure 3). Unsurprisingly, the majority of translated fiction and non-fiction originates from the UK/USA, but the proportion of new translations originally published in English is not nearly as large as it has been. The percentage of new fiction titles written in Danish has risen from 40.2% in 2009 to 50.4% in 2014, while the percentage written in English has fallen from 36.4% to 26.2% in the same period. This decline should be considered in the context of the general increase in the production of fiction during the same years. The

Figure 3: Commercial printed first editions, by original language.

	Fiction						Non-fiction					
	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014
Danish	958	1,040	1,231	1,189	1,223	1,365	2,094	2,152	2,574	2,334	2,254	2,151
Swedish	130	154	153	161	148	171	56	63	51	79	49	60
Norwegian	54	52	58	43	97	71	26	40	38	37	35	27
English/American	868	768	547	697	728	709	620	535	518	589	552	543
German	121	106	120	104	105	104	79	67	76	39	43	58
French	63	45	63	71	85	121	38	22	30	24	50	31
Other languages	190	163	174	155	181	168	105	108	96	127	106	96
All languages in total	**2,384**	**2,328**	**2,346**	**2,420**	**2,567**	**2,709**	**3,018**	**2,987**	**3,383**	**3,229**	**3,089**	**2,966**

Source: Statistics Denmark, book production statistics BOG06.

Figure 4: Commercial printed first editions, by genre.

	2009	2010	2011	2012	2013	2014
Poetry	113	114	193	137	146	183
Plays	30	25	24	26	26	32
Novels/short stories	880	889	828	984	1,028	978
Humour/comics	47	50	49	61	61	55
Poety for children	28	19	35	42	26	33
Children comedy	8	9	5	6	6	9
Stories for children	1,183	1,126	1,152	1,116	1,229	1,383
Humour/comics for children	95	96	60	48	45	36
In total	**2,384**	**2,328**	**2,346**	**2,420**	**2,567**	**2,709**

Source: Statistics Denmark, book production statistics BOG06.

number of titles translated from other Nordic languages has increased, albeit to a lesser degree, in the same period.

The same trends have not been identified for non-fiction. The proportion translated from English has fallen by just over 29% in the period 2009–2014 (corresponding with the total fall in non-fiction), while the proportion of new non-fiction originally written in Danish has risen from 69.4% to 72.5% during the same period.

It is also worth noting that the trend for new, commercial non-fiction seems to be fairly stable, down only 1.7% in the period, compared to the fall for total printed non-fiction (see Figure 2) of 10.2% between 2009 and 2014.

It is possible to specify the genre of both fiction and non-fiction titles, although some additional calculations are required to make them comparable with other data, e.g. the bestseller lists used in bookshops. The table below shows DLC's 17 genre categories, collapsed into eight categories.

Figure 4 shows that the biggest category of new printed fiction consists of storybooks for children (49.6% in 2014), while the second biggest is novels/short stories for adults (36.9% in 2014).

2.1.2 Production of e-books

The data for e-books is complete only for the period 2012–2014 because these have only been registered in the Danish Book List (*Bogfortegnelsen*) since 2012. The number of e-books pub-

Figure 5: Commercial e-book first editions, by original language.

	Fiction			Non-fiction		
	2012	2013	2014	2012	2013	2014
Danish	966	1,185	1,236	789	978	944
Swedish	105	118	108	12	13	18
Norwegian	38	50	64	10	10	12
English/American	274	415	439	84	221	159
German	22	49	29	9	44	16
French	21	35	34	1	14	6
Other languages	65	85	86	10	18	21
All languages – in total	**1,491**	**1,937**	**1,996**	**915**	**1,298**	**1,176**

Source: Statistics Denmark, book production statistics BOG06.

Figure 6: Commercial first editions of fiction in e-book format, by genre.

	2012	2013	2014
Poetry	41	84	89
Plays	19	23	35
Novels/Short stories	943	1,098	1,206
Humour/comics	5	7	4
Poetry for children	4	4	6
Comedies for children	0	0	0
Stories for children	475	720	643
Humour/comics for children	4	1	13
In total	**1,491**	**1,937**	**1,996**

Source: Statistics Denmark, book production statistics BOG06.

lished – both fiction and non-fiction – increased in the period 2012–2014.

One reason for this may be that a number of new e-book editions of older literature were published during the period. At present, it is not possible to cross-check whether newly released-e-books are based on new or older print publications, which makes it impossible to ascertain the extent to which reissues of older works in e-book format have influenced the statistics.

Note that the term "first editions" in this section refers to first editions in e-book format. A title may well be registered as a first edition in both print and digital format, which is why these are dealt with separately in this report.

The most notable e-book statistic is that the percentage of translated titles is considerably smaller than for printed titles (see Figure 5). In the commercial market, translations accounted for just over half of all fiction in the period 2009–2014, while the figure for non-fiction was around a quarter. The corresponding figures for e-books were only 37.6% for fiction and 20% for non-fiction. A number of factors may explain this, e.g. that titles in foreign languages are easily accessible in a digital world.

The vast majority of new e-books are novels and short stories for adults (60.4% in 2014), followed by children's storybooks (32.2% in 2014) (see Figure 6).

2.1.3 The strengths and weaknesses of production statistics

The strength of Statistics Denmark's book production statistics is that they are based on the same dataset every year, which allows trends to be analysed over long periods. However, they also have a number of weaknesses:

- It is not possible to isolate children's literature and school textbooks from the commercial tables and quantify them as percentages of the commercial market.
- The level of detail is not always sufficient. For example, it is not possible to separate crime from other fiction titles, or academic and/or hobby books from other non-fiction works.
- Teaching materials published via licence-based education portals are not included.
- It is not possible to see whether a title has been published in both print and e-book formats, which makes it impossible to determine how many titles are published exclusively as e-books, or how many print titles have also been published as e-books.
- Audio books are not included.

As things stand, it is difficult to shed any further light on the production phase, because these are the only national statistics available. Virtually no factual knowledge is available about authors' and translators' working conditions, and the data about public lending rights provides little information about authors.

2.1.4 Summary: Production

The report identifies the following trends for the production phase:

- The overall number of non-fiction titles in print format is falling, but the number written in Danish remains stable
- The number of fiction titles in print format is rising slowly, and the number written in Danish over the past six years has risen considerably.
- The number of e-books is increasing.
- The fall in printed non-fiction is partially offset by the increase in e-books.

2.2 DISTRIBUTION OF LITERATURE

The signs are that the tendency for publishers' revenue to fall has come to an end after a period of several years. Digital sales in particular are increasing, and digital materials are becoming more common in libraries.

Every year, the Danish Publishers' Association (DPA) presents statistics that compare sales to retail outlets for the two previous years. These statistics are based on data from distributors: NBC, DBK and Dafolo for books, Publizon for e-books. The distributors' role is to ensure that the publishers' books make their way to retailers after they are printed or released in digital format. The DPA estimates that these statistics cover at least 85% of the book market, including non-DPA publishers. The methodology is regularly adjusted, which makes it impossible to compare the data with previous years without making retrospective adjustments.

The DPA's annual statistics focus on turnover and sales volumes for printed works, but it is also possible to extract data for digital sales. Since the statistics refer mainly to sales by publishers to retailers, they will be affected if, for example, a supermarket chain decides to reduce its stocks and temporarily scale back its purchases of new books. This is important, as it means that a (minor) decrease in the publishers' revenue does not necessarily mean a corresponding decline in retail sales.

The statistics also include book club sales, direct sales to public-sector institutions and direct sales to consumers through publishers' websites, etc.

2.2.1 Total publishers's revenue

Overall, there is no significant difference between the two sales years covered by the statistics issued in 2014, although minor fluctuations are discernible in some genres.

Figure 7 shows that revenue from non-fiction has fallen, while revenue from fiction remains unchanged compared to 2013. As previously mentioned, it is possible to isolate statistics from digital titles, and the data reveals significant growth in the last year. This should be seen in the light of the government's DKK 500 million investment (during 2012–2017) in the use of IT in primary and lower secondary schools. Local authorities are investing similar amounts. The biggest single amount is earmarked for digital

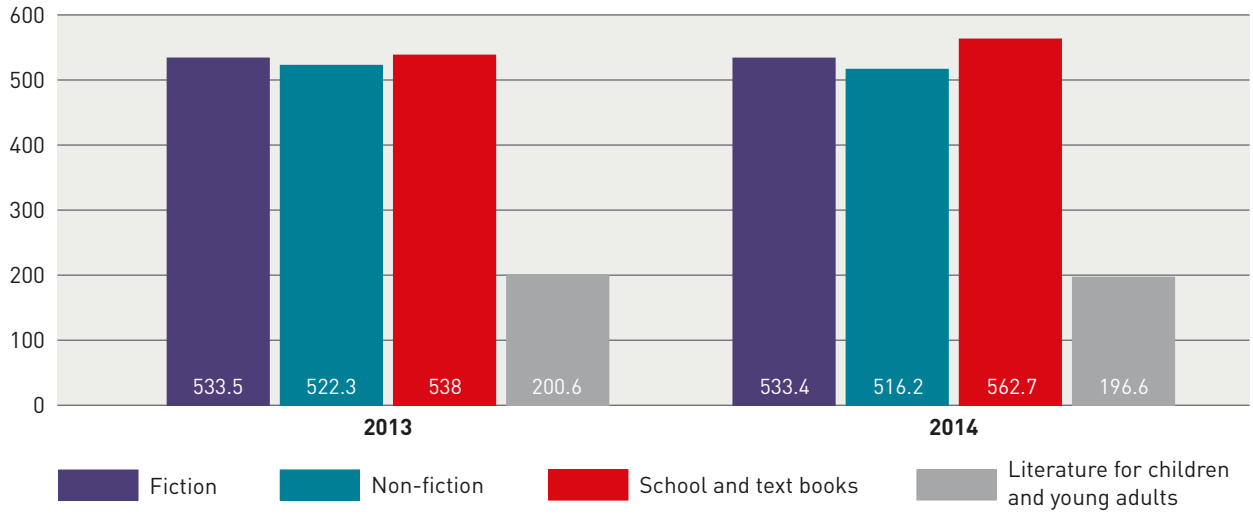
Figure 7: Percentage changes in publishers' revenue, 2013–2014.	
Fiction	0.0 %
Non-fiction	-1.2 %
School and textbooks	4.6 %
Books for children and young adults	-2.0 %
In total	**0.8 %**

Source: DPA annual statistics 2014.

Figure 8: Print and digital revenue, 2013–2014 (DKK in Millions).		
	2013	**2014**
Sales – Print	1,576.9	1,551.0
Sales – Digital	217.5	257.9
Sales – Print: development compared to 2013		-1.64 %
Sales – Digital: development compared to 2013		18.57 %

Source: DPA annual statistics 2014.

Figure 9: Revenue by genre, 2013 and 2014 (DKK in Millions).



Source: DPA annual statistics 2014.

learning materials. It is worth noting that the sale of printed textbooks rose by 4.4% during the same period.

Digital services, such as the libraries' digital lending service eReolen and the commercial e-book streaming service *Mofibo*, also go some way towards explaining the increase in revenue generated from digital formats.

2.2.2 Revenue by genre

Publishers' sales can be divided into four main genres. The data shows that, in both 2013 and 2014, fiction, non-fiction and school/textbooks all generated more or less the same revenue in both years. (Figure 9)

2.2.3 Revenue by sales channel

Figure 10, below, shows that sales by publishers to actual physical outlets fell, while sales to internet booksellers rose significantly. Sales to supermarkets and other retailers rose slightly.

Figure 10: Publishers' revenue, 2013 and 2014 (DKK million).

	Total 2013	Total 2014	Difference %
Sales to bookstores	578.1	555.2	-3.96 %
Sales to online bookstores	206.0	236.3	14.71 %
Sales to other retailers	174.2	180.2	3.44 %
Directly to consumer	258.0	225.1	-12.75 %
Directly to public institutions	568.6	601.6	5.80 %
Misc. sales abroad	9.5	10.5	10.53 %
Total – whole year	**1,794.40**	**1,808.90**	**0.81 %**

Source: DPA annual statistics 2014.

The 2014 edition of the DPA statistics document also compares total revenue over the last ten years. Figure 11 shows that publishers' total revenue rose for the first time in seven years, apparently breaking the negative trend that followed in the wake of the financial crisis, with only a modest reduction in 2013 and modest growth in 2014.

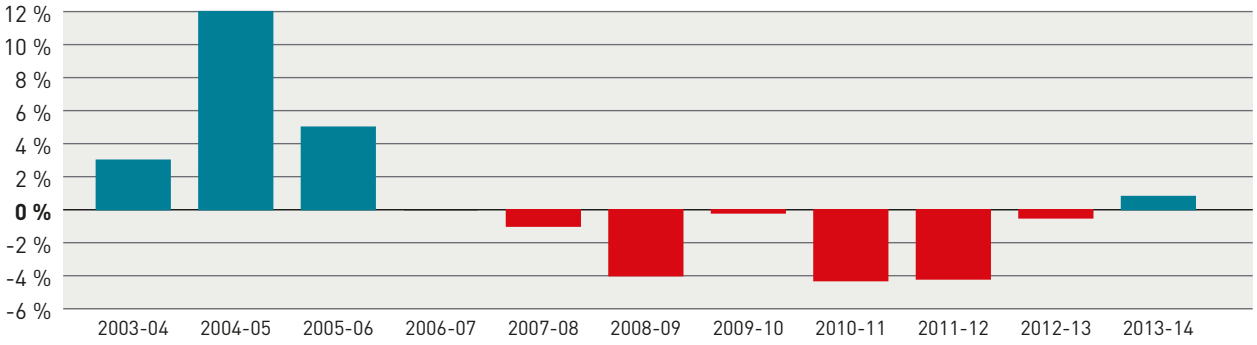
2.2.4 Bookshops as distributors

In 2013, the Danish Competition and Consumer Authority published a report into the consequences of the liberalisation of the Danish book market. Among other topics, it looked at the trend in the number of bookshops, and concluded that the loss of around 100 shops between 2000 and 2013 was more or less in line with the general trend for the retail trade as a whole. In 2000, the average distance to a bookshop was 5.4 kilometres. By 2013, this had increased to 9.2 kilometres.

However, liberalisation has also to led many supermarkets selling books. The report therefore showed that there were more *retail book outlets* in 2013 than in 2000 (see Figure 12). When supermarkets are taken into account, the average distance to the nearest book retailer only increased by 500 metres between 2000 and 2013. Readers in the capital had the shortest average distance to a retailer (2.4 km), while those in Central Jutland had the longest (8.1 km).

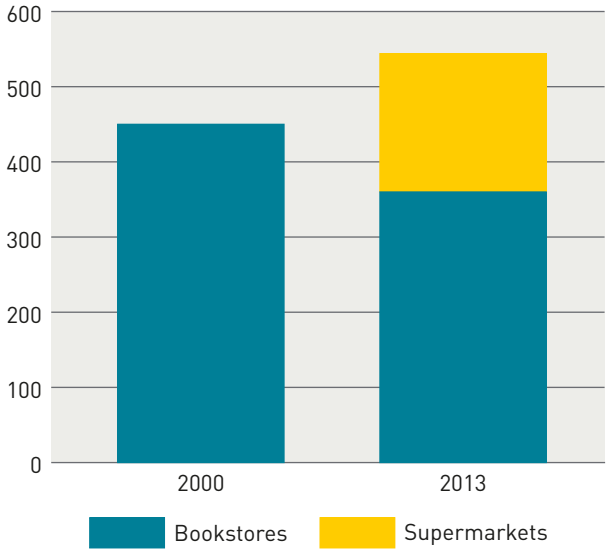
The Danish Booksellers Association has been conducting the survey *Danskernes bogkøb* (Danish Book Buying), since the turn of the century, albeit with minor adjustments along the way. The survey focuses on both buying and reading, and considers books in Danish and books in English separately. (Figure 13)

Figure 11: Percentage changes in publishers' revenue, 2004–2014.



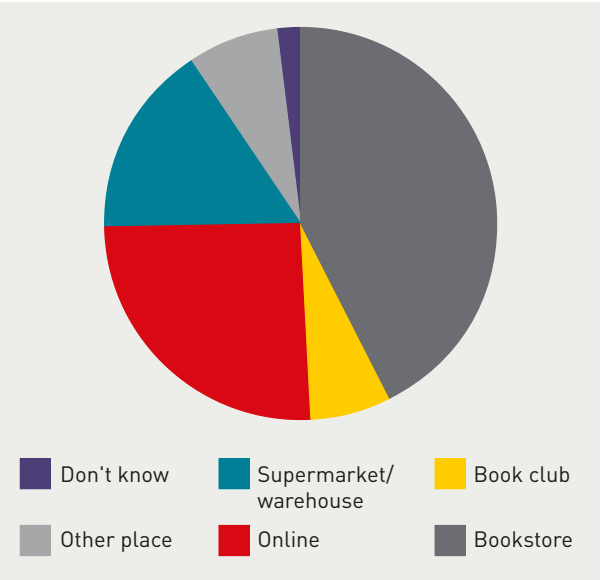
Source: DPA annual statistics 2014.

Figure 12: Physical retail outlets.



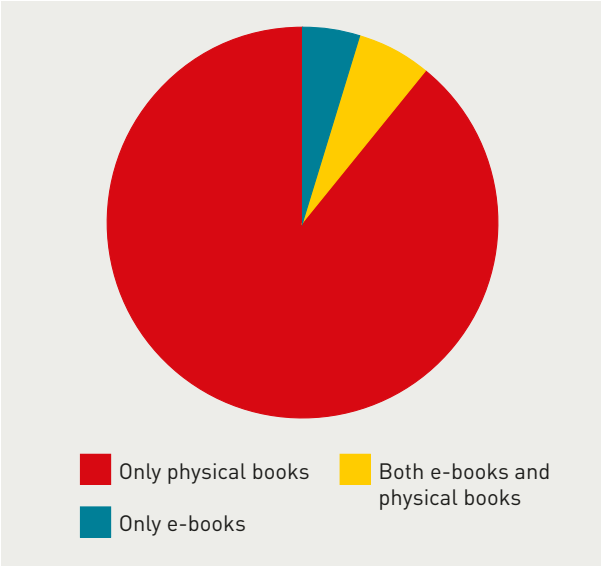
Source: Liberaliseringen af bogmarkedet (Liberalisation of the book market), the Danish Competition and Consumer Authority, 2013.

Figure 13: Source of most recent book purchase.



Source: Danskernes bogkøb (Danish Book Buying), March 2015.

Figure 14: Type of book most recently purchased.



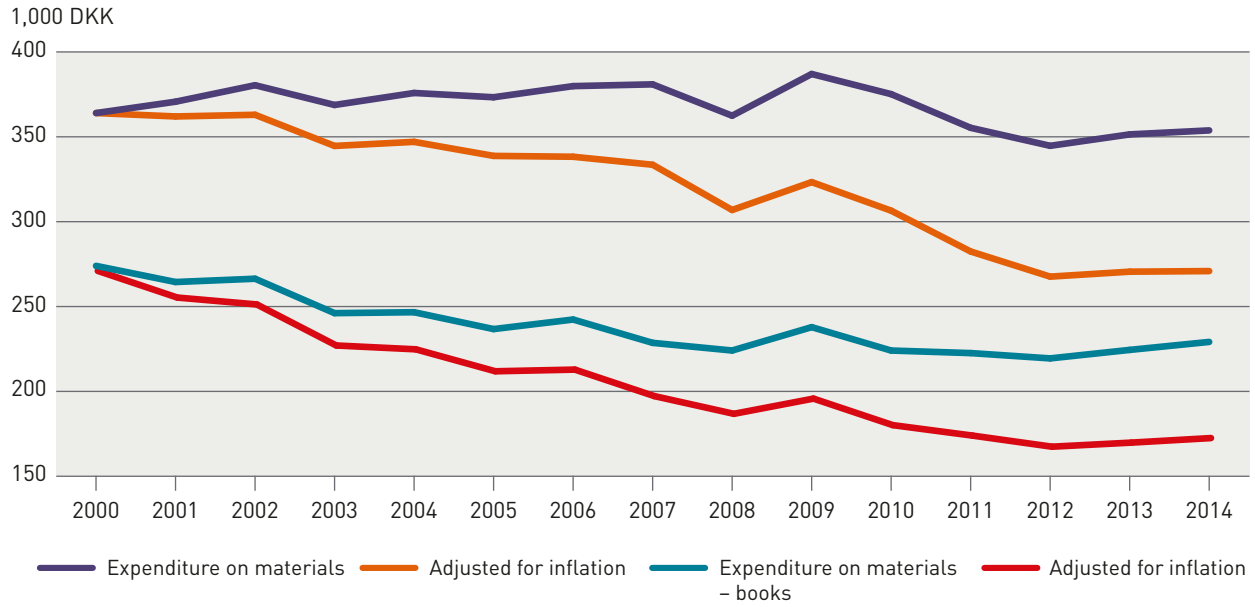
Source: Danskernes bogkøb (Danish Book Buying), March 2015.

One of the questions asks about the type of seller from which the respondent's most recent book purchase was made. In early 2015, (Figure 13), 43% of respondents cited an actual physical bookshop. Online dealers were next (26%), followed by supermarkets (around 16%). Previous surveys show that bookshops accounted for roughly 64% of total sales in 2000, and that this figure fell steadily until it seemed to stabilise in 2012.

The survey also asks whether the most recent purchase was a printed book or an e-book, which provides an indication of the rate of expansion in the e-book market (Figure 14).

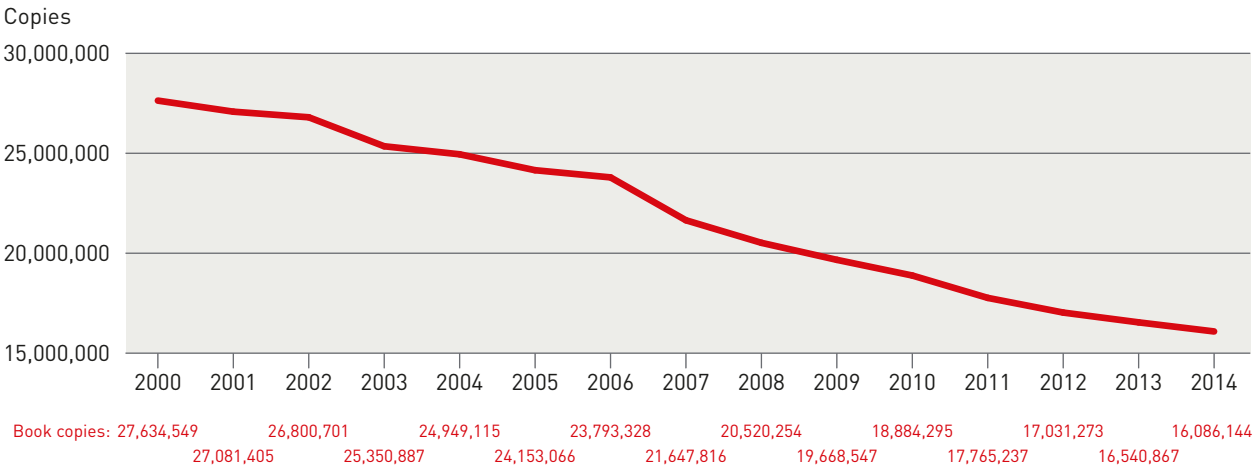
Approximately 11% of respondents reported that their most recent purchase consisted of e-books or both e-books and printed books, which supports the findings on e-book reading in Section 2.4.5 of this report.

Figure 15: Expenditure by public libraries on materials.



Source: Library statistic BIB06, Statistics Denmark (2009–2014) and the Danish Agency for Culture (2000–2008). Adjusted according to Statistics Denmark's consumer price index.

Figure 16: Public libraries' stock of printed books.



Source: Library statistics, Statistics Denmark (2009–2014) and the Danish Agency for Culture (2000–2008).

2.2.5 Public libraries as distributors

Public libraries play an important role in making literature available, and should be considered part of the distribution process. Statistics Denmark's figures for libraries include expenditure on materials (Figure 15) and stocks of books (Figure 16).

Expenditure on materials – both in total and just for books – has increased over the past three years, but is still lower than they were in 2009. In the period 2000–2014, there was a fall in the proportion of expenditure on materials spent on books, from 75% in 2000 to 65% in 2014.

This data has not been adjusted for inflation, but when Statistics Denmark's consumer price index is applied, it becomes clear that libraries' purchasing power is declining.

Figure 16 shows that stocks of books in public libraries have been steadily declining over the last 14 years (by a total of 41.8%). The mergers of local authorities in 2007 may have resulted in duplicate copies, which have subsequently been disposed of.

2.2.6 The range e-books in libraries

All Danish local authorities have now signed up to *eReolen*, the public libraries' lending service for e-books and online audio books. In November 2012, a number of major publishers withdrew their titles from *eReolen* because they were unable to reach agreement with the libraries on a lending model that, in their view, left them with sufficient opportunity to generate income from e-books in other ways. New terms were agreed, and they rejoined the service at the start of 2015. Their absence and return are both reflected in the statistics. The number of online audio book titles available during the same period remained more constant.

The number of books available via *eReolen* increased significantly around the start of 2015, partly due to publishers entering into the new agreement mentioned above. A lending service run by the publishers, *eBib*, closed at the end of 2014. It had 6,713 titles in 2013 and 8,000 in 2014, some of which were also available via *eReolen* (Figure 17).

2.2.7 Strengths and weaknesses of the distribution statistics

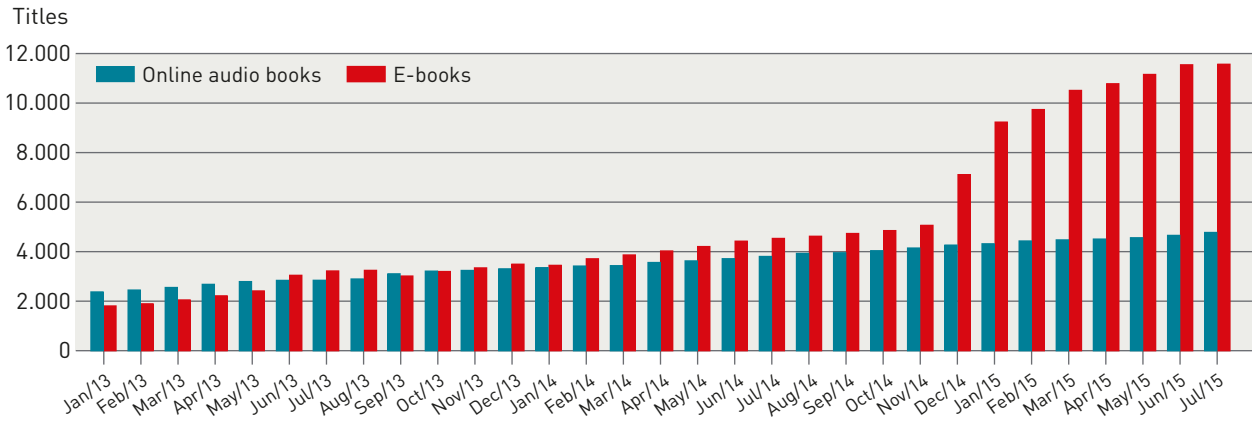
One of the strengths of annual DPA statistics is that the reference point (distribution outlets) also covers publishers who are not members of the DPA, because for the most part all of them use the same distributors. The subdivision into print and digital is also a strength. However, it is difficult to identify longer-term trends, due to changes to the methodology (e.g. to include digital sales), and because the number of publishers who use distributors changes regularly. From a statistical perspective, it is unfortunate that the methodology has not been consistent enough to facilitate comparisons over longer periods.

The statistical sources for the *distribution* phase of this study provide no information on sales by title. Generally speaking, more detail would be desirable. At present, it is impossible to tell whether publishers' revenue is increasingly generated by a small number of bestselling titles, or by a wide range of titles.

Literature is now also distributed via new, alternative, channels, outside the traditional, established channels. No statistics are available for these.

Statistics Denmark publishes a monthly consumer price index, which reveals major fluctuations in book prices. The reason for this is that the index is based on the best-selling titles in the retail sector, which are often subject to fierce price competition, and does not differentiate between different types of book (e.g. hardback novel or picture book). The statistics reveal major fluctuations over short periods. The index sank to its lowest value in June 2014 (94.4) but reached its peak (151.1) just 11 months later, in May 2015. The consumer price index is therefore not a reliable indicator of trends in Danish book prices.

Figure 17: Titles available on eReolen and netlydbog.dk.



Source: Monthly statistics for eReolen and netlydbog.dk.

2.2.8 Summary: distribution

The data referred to in Section 2.2 reveals the following trends:

- Little change in publishers' total turnover between 2013 and 2014, but the downward trend seems to have been arrested after several years
- Slightly lower sales of non-fiction by publishers in 2014 than in 2013
- A considerable increase in sales of literature in digital formats by publishers
- Public libraries have spent much the same on materials over the last 15 years, but inflation has eroded their purchasing power
- A long-term fall in the number of books stocked by public libraries
- The range of e-book titles available from public libraries is increasing.

2.3 CONSUMPTION OF LITERATURE

The number of books borrowed from libraries has been falling over a long period, while the number of e-books has grown in the last two years. Levels of education have an impact on how often people read, but this phenomenon seems to apply to younger people far more than to older generations.

Libraries are a particularly important source of information about the consumption of literature, because the data they generate spans a longer period. The data for lending and stocks discussed in the following section provides some general insight into book reading in Denmark. Gallup's *Index Denmark* also conducts regular polls to gauge the nation's reading habits.

2.3.1 Book lending from public libraries

Figure 18 shows a steady decline in both lending and stock levels in public libraries. In the early 2000s, lending and stock levels kept pace with one other. However, after 2006, stock levels began to fall significantly faster than lending. On average, each copy of a book is borrowed more times now than was the case 14 years ago.

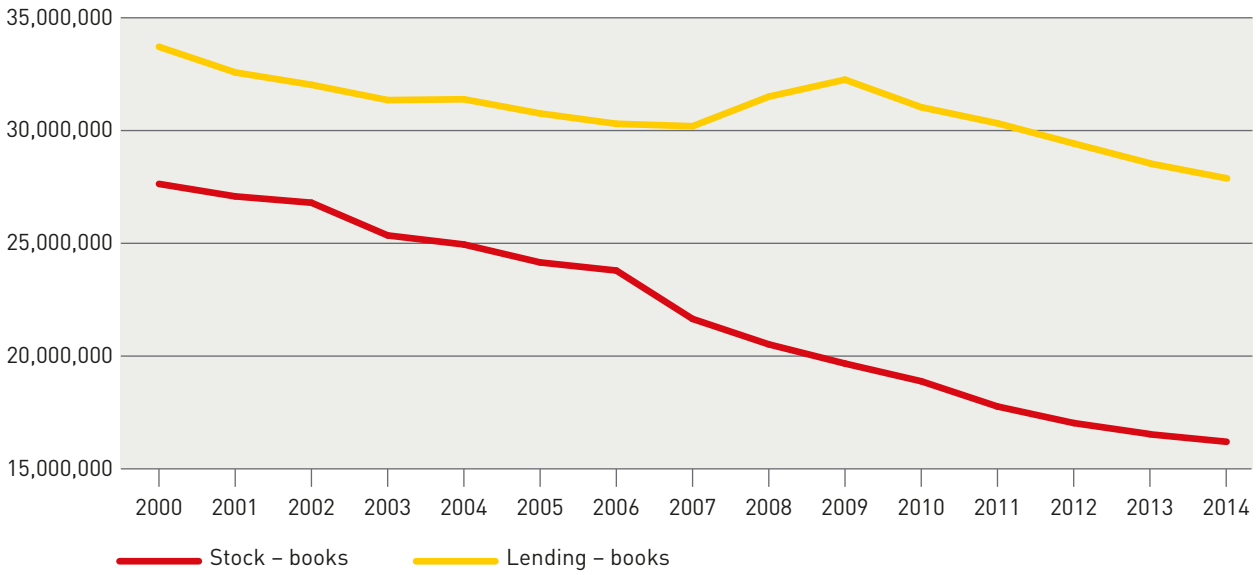
2.3.2 Lending per local authority

The library statistics can generally be broken down into individual local authorities, which facilitates comparisons of lending patterns with other data from Statistics Denmark for the same authorities.

The maps to the right show the average number of print books borrowed per capita in 2014, the average taxable income per taxpayer, and the number of people per 1,000 who have completed a medium- or long-cycle education.

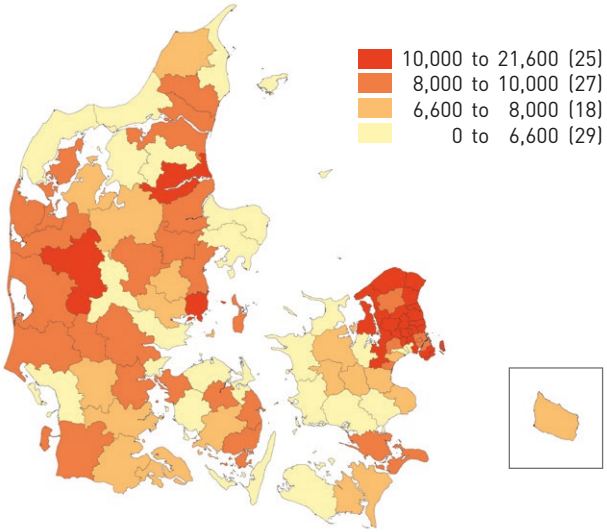
Comparing the colours in the three maps reveals some minor correlation between the variables education, income and library lending.

Figure 18: Data for stock levels and lending of printed books by public libraries.



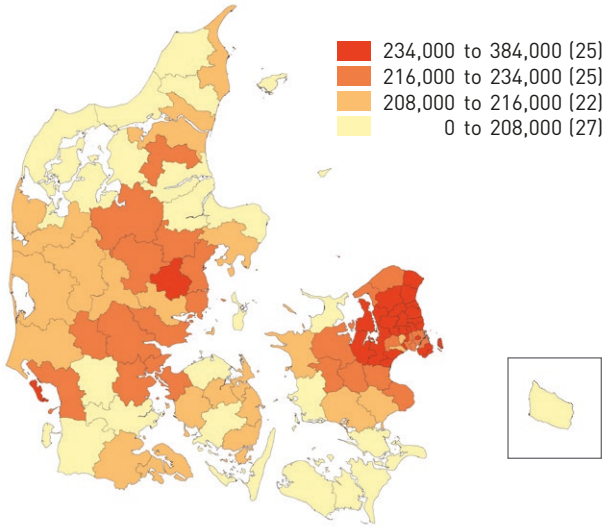
Source: Library statistics, Statistics Denmark (2009–2014) and the Danish Agency for Culture (2000–2008).

Figure 19: Loans per 1,000 inhabitants (2014).



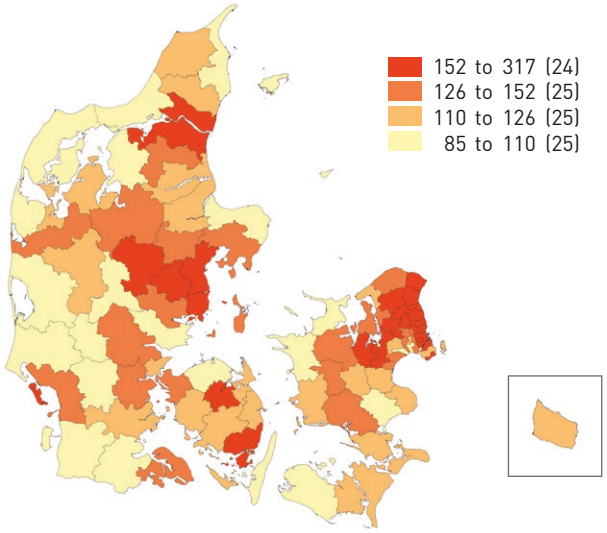
Source: Statistics Denmark, library statistics SBS1.

Figure 20: Average taxable income (2013).



Source: Statistics Denmark, INDKP101.

Figure 21: Number of people per 1,000 of the population who have completed medium- or long-cycle education.



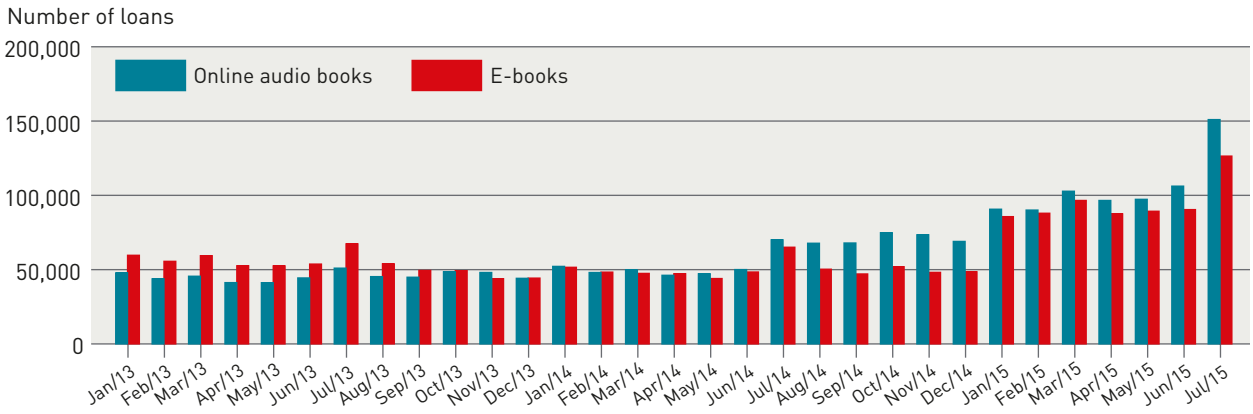
Source: Statistics Denmark, HFUDD15.

However, it is important to emphasise that the pattern is not uniform across the country. (Figures 19, 20 and 21)

2.3.3. Lending of e-books

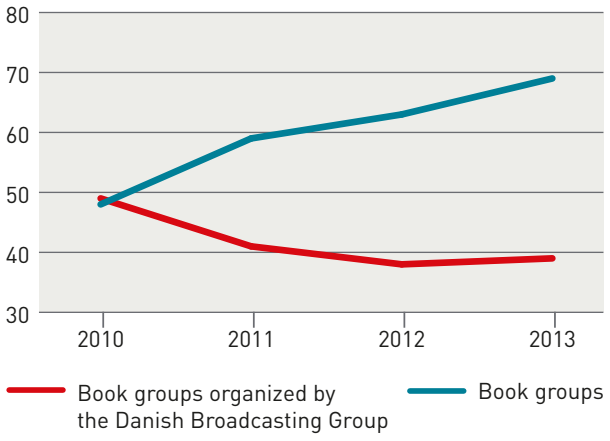
eReolen, the national lending service for e-books, publishes monthly data on total lending, and on the number of online audio books and e-book titles available. The number of loans acts as an indicator of how readily people have taken to e-books and online audio books, while the number of titles is illustrative of the range available. The lending statistics in Figure 22 show that July, the main holiday month, is consistently the peak month for e-book lending. It also shows that lending rose in 2015 after a number of major publishers made more titles available on *eReolen* around the start of the year. The number of titles available is shown in Figure 17. Demand

Figure 22: Lending from eReolen and netlydbog.dk



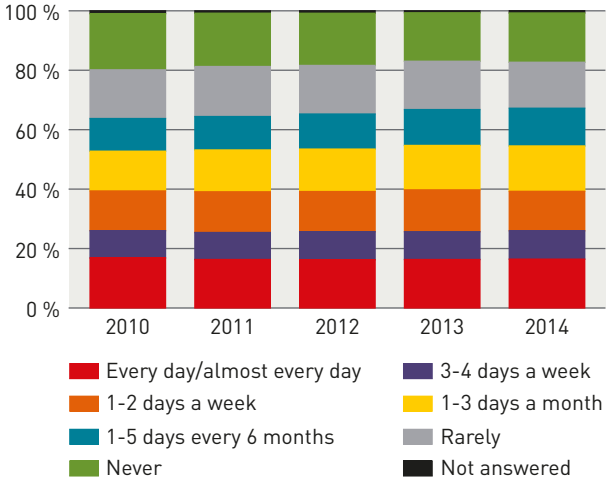
Source: Monthly statistics for eReolen and netlydbog.dk.

Figure 23: Number of local authorities with book groups.



Source: Library Barometer.

Figure 24: Reading of fiction, by frequency.



Source: Gallup, Index Denmark.

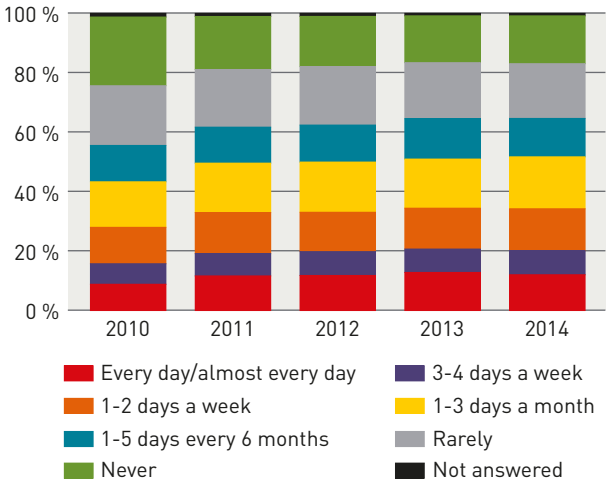
for digital audio books is also increasing rapidly, with the monthly lending figure almost tripling between July 2013 and July 2015. (Figure 22)

2.3.4. Book groups in public libraries

Book groups, where readers meet in libraries to read and discuss literature, have become widespread in recent years, and are now an important part of the Danish literary scene. The number of local authorities with book groups is not included in Statistics Denmark's library figures. However, it is published in *Biblioteksbarometer* (Library Barometer), an annual survey of services offered by public libraries, which includes information about internet access, homework clubs, courses, events, etc.

Figure 23 shows that the number of book groups has risen in the four years that the question has been included in the Library Barometer.

Figure 25: Reading of non-fiction, by frequency.



Source: Gallup, Index Denmark.

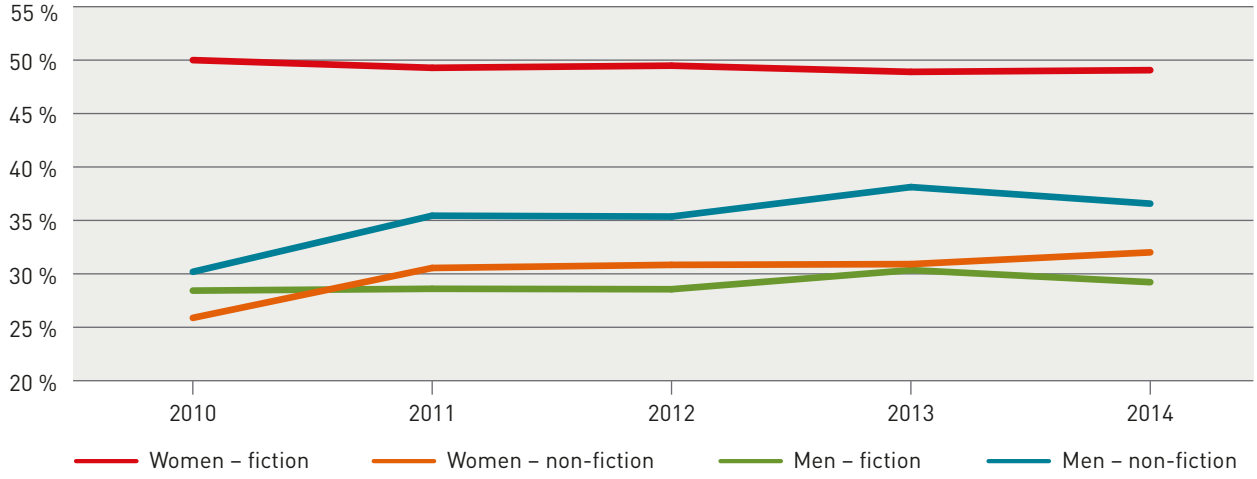
2.3.5 Reading habits

Gallup's *Index Denmark* asks about reading habits, sub-divided into fiction and non-fiction. The data can then be cross-referenced and analysed according to demographic information about the respondents' gender, age, education, etc.

Over the past five years, there has been a small increase in how often respondents read fiction (see Figure 24). The proportion of people who rarely or never read fell by approximately 3% in the period 2010–2014. The proportion who read fiction 'every day/almost every day' or 'three–four days a week' has remained more or less unchanged in the same period, so the overall increase must be down to those who read less than these categories. Indeed, the proportion of respondents who read '1–3 days a month' or '1–5 days every 6 months' increased from 24.4% to 28% between 2010 and 2014.

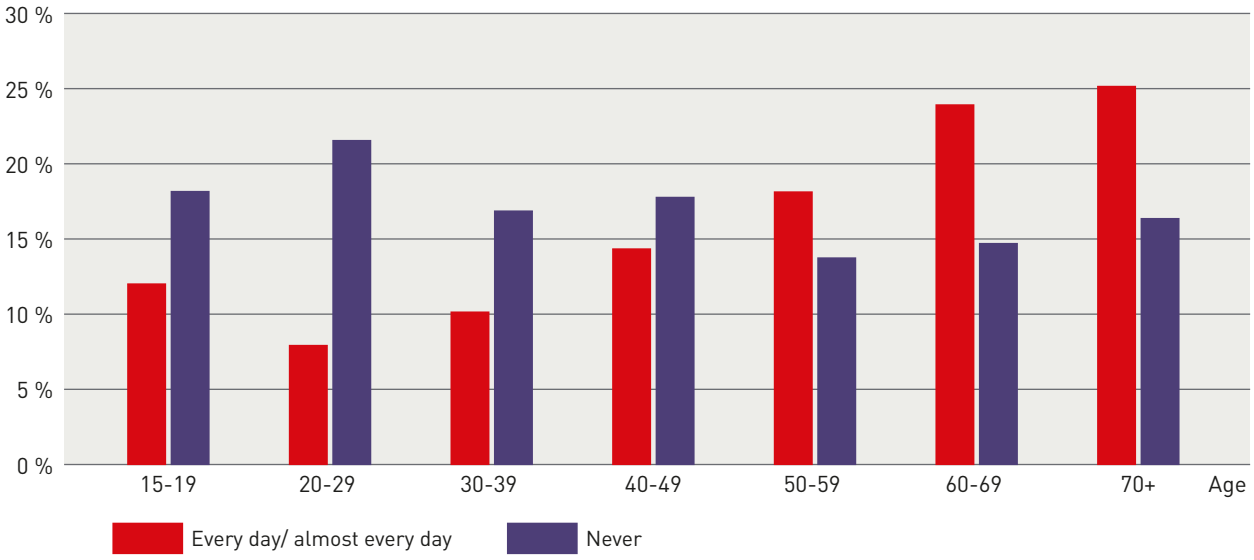
The proportion of people who rarely or never read non-fiction dropped by about 8.7% in the period 2010–2014 (see Figure 25). The proportion who read non-fiction 'every day/almost every day' or '3–4 days a week' rose from 15.8% in 2010 to 20.2% in 2014. Figure 25 shows that the 2010 data slightly deviates from the

Figure 26: Reads once or more a week.



Source: Gallup, Index Denmark.

Figure 27: Readers of fiction in 2014 (by age).



Source: Gallup, Index Denmark.

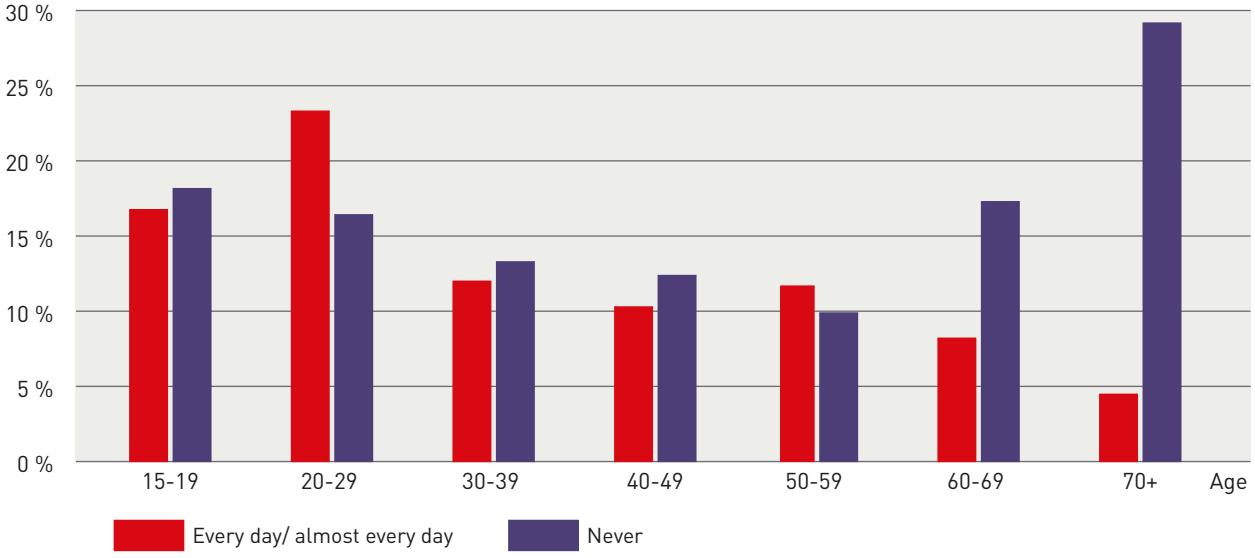
other years. If data from 2010 is omitted, the increase in the proportion of respondents who read non-fiction 'every day/almost every day' or 'three–four days a week' is around 1%, while the fall in the proportion of people who rarely or never read non-fiction is 2.7%.

Figure 26 illustrates men's and women's reading habits, broken down into fiction and non-fiction. The category 'reads every week or more often' includes respondents who said that they read either 'every day/almost every day', 'three–four days a week' or 'one–two days a week'.

The graph shows that women read fiction significantly more often than men. Men are the most frequent readers of non-fiction, but the difference between men and woman is not all that great. Both genders read non-fiction more often in 2014 than they did in 2010.

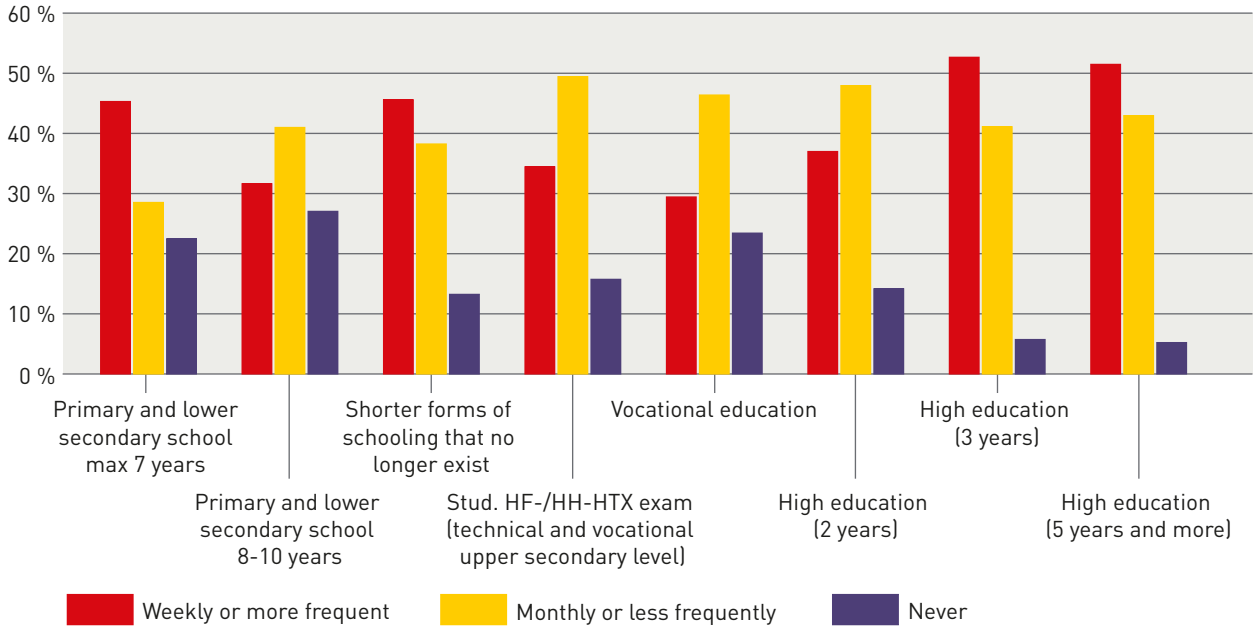
When the respondents who read fiction every day/almost every day and those who never read fiction are analysed by age (see Figure 27), it becomes clear that the most frequent readers of fiction are the older generations. The proportion of respondents who never read is highest among

Figure 28: Readers of non-fiction in 2014 (by age).



Source: Gallup, Index Danmark.

Figure 29: Readers of fiction in 2014 (by level of education).



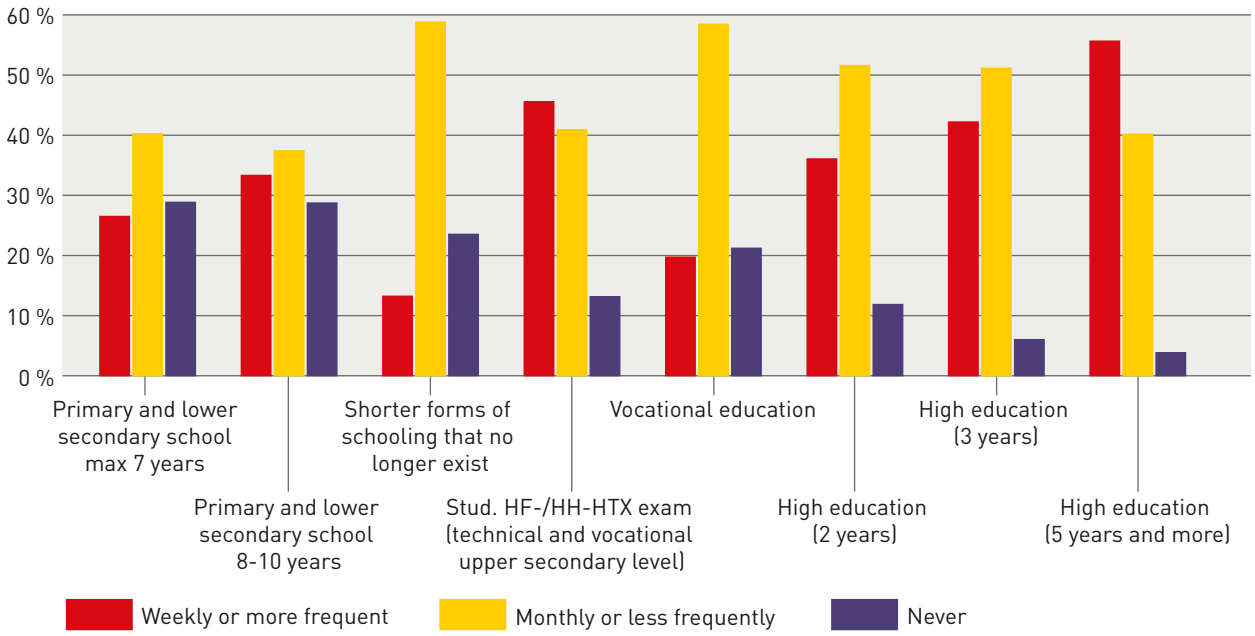
Source: Gallup, Index Danmark.

young people, and the largest number is found in the age group 20–29.

However, when it comes to non-fiction, the older generations are not the most active readers (see Figure 28). Respondents in their twenties make up the biggest group of people who read non-fiction every day, while 29% of people aged 70+ never read non-fiction.

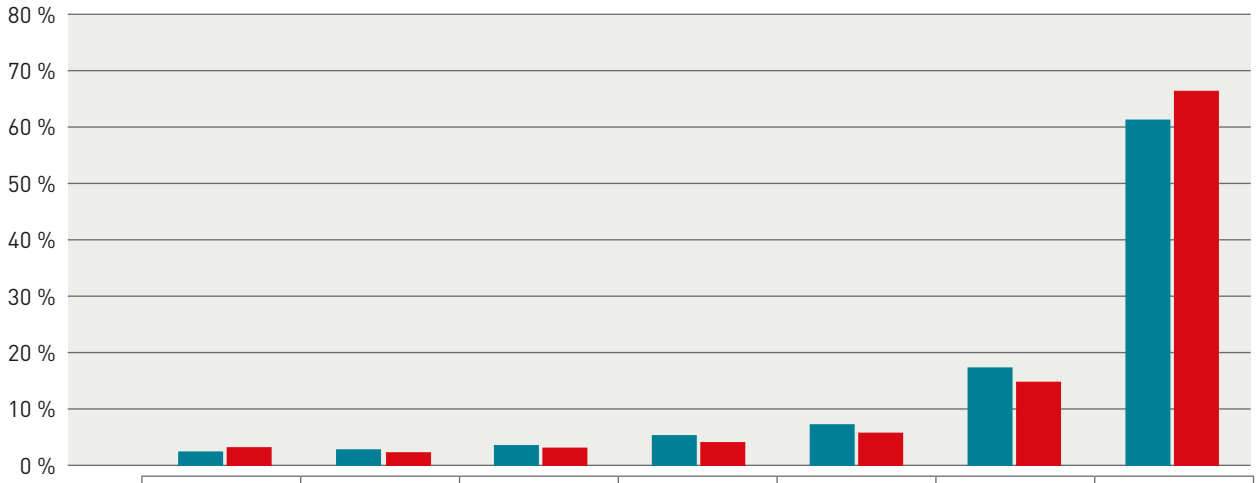
When the statistics are broken down by level of education, it becomes clear that the most highly educated read fiction most frequently (see Figure 29). Conversely, the proportion of people who never read fiction is highest amongst people who did not continue in formal education after primary and lower secondary school. It is also worth noting that more than 40% of those who read fiction 'every week' left primary and lower secondary school after seventh grade or before, or were part of older systems, and indicated their level of education as *'Mellem / real / præl'*

Figure 30: Readers of non-fiction in 2014 (by level of education).



Source: Gallup, Index Danmark.

Figure 31: Readers of e-books 2014.



	Daily/almost daily	3-4 days a week	1-2 days a week	1-3 days a month	1-5 days every 6 month	Rarely	Never
Men	2.4 %	2.7 %	3.5 %	5.2 %	7.2 %	17.3 %	61.2 %
Women	3.1 %	2.2 %	3.0 %	4.0 %	5.7 %	14.7 %	66.3 %

Source: Gallup, Index Danmark.

(shorter forms of schooling in Denmark that no longer exist). This suggests that older people – regardless of level of education – generally read fiction more often than younger people.

Figure 30 illustrates the reading of non-fiction in relation to education. Again, the trend is for the most highly educated to read most frequently. Note, however, that the next largest group consists of those who have passed the *'Stud. / HF / HH-exam / HTX exam'* (technical and vocational upper secondary level). As with fiction, the proportion of people who never read non-fiction is greatest among those who left formal education earliest.

Since 2014, Gallup has also asked about e-books. Figure 31 shows that a very large proportion of respondents never read e-books – more than 60% of both genders. Less than 10% of either gender read e-books once a week or more often. Note that although eReolen's

latest lending figures suggest growing interest in e-books, this cannot be corroborated by the Gallup data, as it is only available for 2014.

2.3.6 Strengths and weaknesses of consumption statistics

Like the statistics for book production, library statistics are based on stable and consistent datasets that span many years. Unfortunately, there are a limited number of parameters in the library statistics that lend themselves to extrapolation about the Danish book market. It would be useful to be able to link data on population and region with data on lending and genre to a greater extent. This would facilitate analyses of differences in reading habits between men and women of different ages in different parts of the country, etc. A new IT system for public libraries is being rolled out across most of the local authorities, which should improve the quality of the data and the level of detail in the statistics. The Danish Digital Library (DDL) is conducting an analysis of lending and demographic data from Statistics Denmark, which will eventually provide more detailed information about e-book reading.

Another weakness is the lack of detailed information about book sales at title level in Denmark. Between 2008 and 2011, the industry used Nielsen BookScan (bookscan.dk) to calculate sales at title level. However, after 2011, agreement could not be reached on terms for its continued use. Since then, Statistics Denmark has launched a pilot project to analyse the book sales of major supermarket chains based on scanner data. If this project is successful, it may be made permanent and could even be extended to other booksellers.

A separate challenge in the acquisition of data about book sales by title is the increasing use of subscription-based services for e-books and online audio books.

Nor are statistics available for school libraries (purchases, lending, stocks, etc.), although the data for public lending rights shows that books in school libraries account for approximately 45% of the stock on which the calculations are made. When all of the above is taken into account, it is notable that much of the purchasing done by libraries has not been mapped. This is also true of the increasing use of online learning portals by schools.

2.3.7 Summary: consumption

The sources in this section of the report identify the following trends:

- Fall in the number of printed books borrowed
- The fall in the number of printed books borrowed is slower than the fall in stock levels
- Most local authorities run book groups in libraries
- An increase in the number of e-books available via *eReolen*
- More e-books and online audio books are being borrowed from *eReolen*
- A slight upward trend in the numbers reading non-fiction
- Older generations are the most frequent readers of fiction but are less likely to read non-fiction
- Level of education has an impact on how often people read – especially in the younger generations.

3. COMPARING STATISTICS FROM DIFFERENT SOURCES

3.1 DANISH LITERATURE PURCHASED BY LIBRARIES

Libraries mainly buy literature written in Danish. Novels and non-fiction are the most common adult genres.

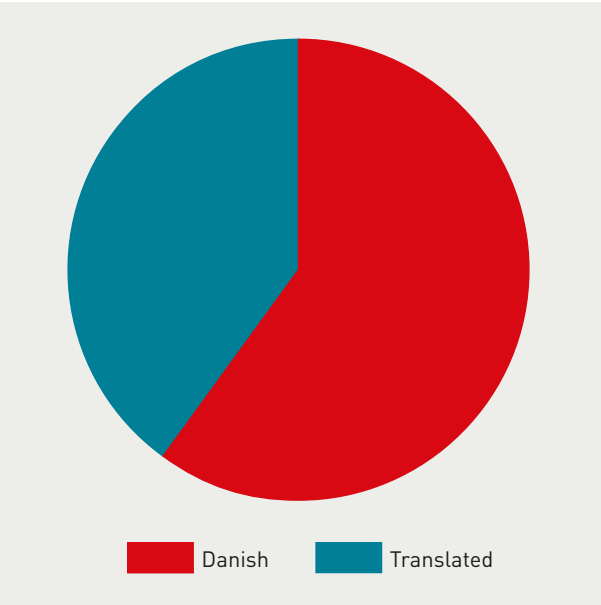
Figure 32 shows that the percentage of translated literature bought by libraries remained fairly stable, at around 40%, for titles published in 2013 and 2014. Libraries purchased a total of 1,207,661 copies of books published in 2013. The figure for 2014 is lower (893,574) due to the time lag between publication and purchase. The royalties for public lending rights are based on approximately 40 million copies, meaning that copies of titles released in 2013 and 2014 make up around 5% of the total stock of books held by libraries.

In 2013, 12,945 book titles (with FAUST numbers) were produced. Libraries purchased at least one copy of 8,542 of them (about 66% of the total). On average, libraries purchased 141 copies of the books published. In 2014, 12,572 book titles (with FAUST numbers) were produced. Libraries purchased at least one copy of 7,386 of them (about 59% of the total). On average, libraries purchased 121 copies of the books published.

Figures 33 and 34 show the books in Danish purchased by libraries by target group (adults/children), genre and original language, as well as the proportion of total production and of total library purchases for each genre and target group. This makes it possible to work out whether a given genre accounts for as large a proportion of library purchases as it does of total production.

Note in particular the percentages for novels and non-fiction among the Danish-language books for adults.

Figure 32: Library stocks of Danish and translated literature published in 2014.



Source: DLC, extract produced for the Book and Literature Panel and for calculating royalties for public lending rights. Filter: printed.

Figur 33: Printed Danish-language books produced for adults as a proportion of books bought by libraries.

	Proportion of production 2013	Proportion of liberary purchase 2013	Proportion of production 2014	Proportion of liberary purchase 2014
Picture books	0.1 %	0.2 %	0.1 %	0.1 %
Poetry	2.9 %	1.7 %	3.8 %	1.8 %
Plays	0.4 %	0.2 %	0.5 %	0.2 %
Essay(s)	0.0 %	0.0 %	0.0 %	0.1 %
Integrated genres	0.0 %	0.0 %	0.1 %	0.0 %
Short stories	1.1 %	2.0 %	1.6 %	1.8 %
Novels	8.2 %	26.7 %	8.8 %	30.7 %
Literary letters	0.0 %	0.0 %	0.0 %	0.0 %
Comics	0.5 %	0.6 %	0.5 %	0.6 %
Non-fiction	86.7 %	68.5 %	84.5 %	64.7 %
Total	**100 %**	**100 %**	**100 %**	**100 %**

Source: DLC, extract produced for the Book and Literature Panel and for calculating royalties for public lending rights.

Figur 34: Printed Danish-language books produced for children as a proportion of books bought by libraries.

	Proportion of production 2013	Proportion of liberary purchase 2013	Proportion of production 2014	Proportion of liberary purchase 2014
Picture books	27.0 %	22.5 %	27.0 %	25.6 %
Poetry	1.2 %	0.3 %	0.8 %	0.1 %
Plays	0.9 %	0.0 %	1.1 %	0.1 %
Short stories	4.7 %	3.2 %	5.0 %	2.2 %
Novel	55.6 %	65.4 %	55.3 %	64.0 %
Comics	0.7 %	0.5 %	1.9 %	1.3 %
Non-fiction	10.0 %	8.1 %	8.9 %	6.7 %
Total	**100 %**	**100 %**	**100 %**	**100 %**

Source: DLC, extract produced for the Book and Literature Panel and for calculating royalties for public lending rights.

Novels account for three times as large a proportion of library purchases as they do of total production, meaning that adult fiction is the genre that libraries buy most copies of per title. The opposite is true of adult non-fiction, which accounts for a high proportion of production but, comparatively, a much lower share of the books bought by libraries. The figures also demonstrate that, between them, novels and non-fiction account for the bulk of the copies of books for adults published in 2013 and 2014, as well as those purchased by libraries.

Picture books and novels dominate both production and purchasing by libraries of children's literature. Picture books account for a slightly smaller percentage of library purchases than of production. Novels for children make up approximately 10% more of library purchases than of production. Compared to adult non-fiction, children's non-fiction accounts for a smaller share of both production and library purchases.

Figure 35: Printed translated books produced for adults compared to books bought by libraries.

	Proportion of production 2013	Proportion of liberary purchase 2013	Proportion of production 2014	Proportion of liberary purchase 2014
Picture books	0.3 %	0.3 %	0.0 %	0.0 %
Poetry	0.7 %	0.4 %	0.7 %	0.3 %
Plays	0.3 %	0.1 %	0.3 %	0.0 %
Essay(s)	0.0 %	0.0 %	0.1 %	0.0 %
Integrated genres	0.0 %	0.0 %	0.1 %	0.0 %
Short stories	2.1 %	2.0 %	2.1 %	2.0 %
Novels	46.0 %	66.4 %	50.1 %	67.9 %
Literary letters	0.1 %	0.0 %	0.0 %	0.0 %
Comics	2.9 %	2.3 %	3.5 %	2.5 %
Non-fiction	47.5 %	28.5 %	43.2 %	27.3 %
Total	**100 %**	**100 %**	**100 %**	**100 %**

Source: DLC, extract produced for the Book and Literature Panel and for calculating royalties for public lending rights.

Figure 36: Printed translated books produced for children as a proportion of books bought by libraries.

	Proportion of production 2013	Proportion of liberary purchase 2013	Proportion of production 2014	Proportion of liberary purchase 2014
Picture book	49,5 %	41,2 %	43,7 %	36,5 %
Poetry	0,3 %	0,2 %	0,1 %	0,2 %
Plays	0,0 %	0,0 %	0,0 %	0,0 %
Short stories	1,3 %	1,4 %	1,9 %	1,7 %
Novels	31,2 %	43,6 %	33,3 %	45,7 %
Comics	8,3 %	4,4 %	8,0 %	3,5 %
Non-fiction	9,3 %	9,2 %	12,9 %	12,4 %
Total	**100 %**	**100 %**	**100 %**	**100 %**

Source: DLC, extract produced for the Book and Literature Panel and for calculating royalties for public lending rights.

3.2 TRANSLATED LITERATURE PURCHASED BY LIBRARIES

The translated literature for adults in libraries consists almost exclusively of novels and non-fiction. Libraries purchase very little translated poetry and drama.

Figure 35 reveals the same tendencies for translated adult novels and non-fiction as for titles in Danish. Novels constitute a larger proportion of library purchases than they do of production. Non-fiction translations accounted for a smaller proportion of library purchases than of production. It is also worth noting that translated literature for adults almost exclusively consists of novels and non-fiction.

Figure 36 shows that the proportion of translated picture books for children is smaller than their proportion of production, and that the proportion of translated children's novels purchased by libraries is approx. 12% higher than their proportion of production. It is also worth noting that translated comics for children are more popular than those written in Danish.

4. SHORTCOMINGS AND POTENTIAL IMPROVEMENTS

The terms of reference for the Book and Literature Panel require it to 'collate available statistical knowledge about the book market on an annual basis'. This aim is reflected in Section 2 of this report. The terms of reference also require that the Panel 'identify shortcomings and make recommendations for improvements to statistics'[2].

The Panel therefore identified strengths and weaknesses in the statistics for each part of the chain (*production, distribution* and *consumption*). The figure below summarises the main shortcomings and suggests potential improvements.

PRODUCTION

One means of improving statistics about production would be for Statistics Denmark to produce separate tables for commercial children's books and school books. This would make it easier to relate the statistics to the publications' target groups.

Another improvement would be better statistics for printed books and e-books, which show whether a title has been published in both formats and how many have only been published as e-books. Including audio books in the production statistics would also be useful.

It would also be a good idea for the Panel to map alternative forms of publication on a regular basis, in order to refine and validate these initial findings.

In addition, there is a clear need for more information about authors' and translators' working conditions, which are only sparsely covered by outdated surveys and data. (Figure 37)

Figure 37: Shortcomings and areas for improvement per phase (production, distribution, consumption)

Production	Distribution	Consumption
• Include commercial children's books in the book production statistics	• Comparability of DPA statistics over longer periods	• More detail in the library statistics
• Make it possible to see whether titles have been published as both printed books and e-books	• Information on the range of titles in bookshops	• More detailed studies of reading habits
• Map alternative forms of publication	• Information on the 'new literary life cycle'	• More detailed information on book sales, e.g. at title level
• Map writers' and translators' working conditions		• Data on streaming of literature.

[2] See Section 5 of the Book and Literature Panel's terms of reference.

DISTRIBUTION

One way of improving distribution data would be to make the DPA's annual statistics more detailed, e.g. by including information at title level. It would also be useful if the data was in a form that facilitated retrospective comparisons. Currently, this is not done systematically, but only when the DPA adjusts data retrospectively.

It would also be useful for the statistics to allow for a better understanding of the importance of booksellers in the distribution of new literature, especially in relation to their product range. The 'new literary life cycle' is another area worthy of closer examination, so that the statistics cover new pathways as well as the more traditional distribution channels.

CONSUMPTION

More detailed statistics for the consumption phase would also be useful. With regard to the library statistics, this could involve including information on lending by genre. More detailed statistics about reading would also be useful. Streaming provides unique opportunities to generate statistics, because the accompanying data can be used to conduct detailed studies of e-book reading habits.

There has long been a need for sales statistics at title level, and that need remains.

The Book and Literature Panel will refer these ideas for potential improvements – e.g. separate data for children's books within the statistics for commercial book production, and comparing DPA statistics over longer periods – to the organisations best placed to implement them.

The Panel will also commission two studies prior to next year's annual report:

- *A survey of authors' financial circumstances*: As part of its remit to map the current state of literature, the Book and Literature Panel will commission a study of authors' financial circumstances for all genres and forms of publication. This will generate data about the different sources of earnings for authors – those related to their writing activities and those that are not. It will also generate similar data about translators, and will include labour market data from Statistics Denmark, where possible.
- *A mapping exercise of existing reading studies, in order to devise and recommend a methodology for a future national reading survey*: The Book and Literature Panel plans to conduct a mapping exercise of existing reading studies, both in Denmark and in comparable nations, in order to find out how they are used and exactly what information they provide. The Panel expects to use this study as a basis for making recommendations on methodology for capturing statistics about reading literature.

5. ABOUT THE BOOK AND LITERATURE PANEL

The Book and Literature Panel was established in April 2014 by Marianne Jelved, then Minister of Culture.

5.1 TERMS OF REFERENCE

Objectives

The Minister of Culture has established the Book and Literature Panel to study the book market by:

- collating the available annual statistics, identifying shortcomings and making recommendations for improvements to the statistics
- monitoring the circumstances of quality literature in the light of changes in the book market and reading habits
- promoting debate about literature in Denmark through seminars and conferences.

Members

The Book and Literature Panel will be established for an initial period of four years with six to eight members whose collective expertise covers statistics about the book market, international trends, literature, the sociology of literature, the consumer perspective and reading habits and patterns.

The Panel may, if necessary, co-opt additional expertise on libraries, other forms of art, research or academia.

The Minister of Culture appoints the members and chairperson.

Advisory group

The panel will be supported by an advisory group consisting of representatives of the Ministry of Culture, the Competition and Consumer Authority, the Danish Publishers' Association, the Danish Writers Association, the *Foreningen af skønlitterære forfattere* (Danish Fiction Writers Association), the Danish Consumer Council and the Danish Library Association.

The advisory group will meet at least once a year for a wider-ranging discussion of the Panel's work and achievements.

Resources

The Minister of Culture has earmarked DKK 0.5 million p.a. from the pool for the development of cultural policy and information to support the work of the Panel.

The Panel is expected to produce an annual publication and host conferences and seminars.

Neither the Panel nor the advisory group members receive any fees for their work.

A small portion of the budget may be assigned to the Danish Agency for Culture for event management, analyses, etc.

www.slks.dk/bogen-2015

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