



# NORDIC BOOK STATISTICS REPORT 2014

# Innholdsfortegnelse

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## INTRODUCTION

The publisher associations in Denmark, Finland, Iceland, Sweden and Norway produce this report jointly in an effort to give its members updated information and a good tool for analyzing their markets.

The book market is difficult to measure and analyze. The large number of new books published each year, the large number of publishers and the variety of distribution channels is a challenge for those who want to collect reliable statistical information.

International comparison is often difficult to make due to legal and structural differences between countries. In spite of the geographic and historic closeness between the Nordic countries, there are considerable differences in the structure. Extended comments are therefore crucial.

In this report we summarize the most important issues and issues where there is comparable figures. In the box below we have estimated figures for the total market. Currency calculation is based on year-end date currency rate. The figures includes both paperbooks, other physical products and digital downloading.

We hope that this report will be of interest to our members, to others working in the book industry and to all others who are interested in the development of book publishing in the Nordic countries.

## KEY FIGURES

	<b>Number of inhabitants in millions (Mio)</b>	<b>Number of bookstores: physical/internet</b>	<b>Number of inhabitants per bookstore</b>	<b>Number of other retailers (estimate)</b>	<b>VAT: in general/on books / on downloadables</b>
<b>Denmark</b>	5,62 Mio	342/17	15 655	2 200	25 %/25 %/ 25%
<b>Sweden</b>	9,75 Mio	400/3	24 375	5 000	25 %/6 %/ 25%
<b>Finland</b>	5,47 Mio	239/2	22 697	2 400	24 %/10 %/ 24 %
<b>Norway</b>	5,18 Mio	569/13	8 900	3 000	25 %/0 %/25 %
<b>Iceland</b>	0,33 Mio	28/3	10 645	125	25,5% / 7% / 7%

	<b>Gross sales / Total market * local currency (estimate)</b>	<b>Gross sales / Total market * recalculated in EUR</b>	<b>Average sales pr inhabitant (estimate in EUR)</b>	<b>Price level index 2014**</b>	<b>Average sales pr inhabitant (adjusted with price level index) per 2014</b>
<b>Denmark</b>					
<b>Sweden</b>	6 350 mSEK	699 mEUR*	72 EUR*	1,09	65,8
<b>Finland</b>	504 mEUR*	504 mEUR*	92 EUR*	1,00	92,0
<b>Norway</b>	5 522 mNOK*	615 mEUR*	119 EUR*	1,32	89,8
<b>Iceland</b>	4 588 mISK*	28 mEUR*	83 EUR*	1,09	75,9

\*Excl VAT

\*\*Statistisk centralbyrå's price level index, Price level index is defined as purchasing power parity divided with currency rate.

The price level index expresses the price level for a given country, related to one or several other countries.

# THE BOOK MARKET

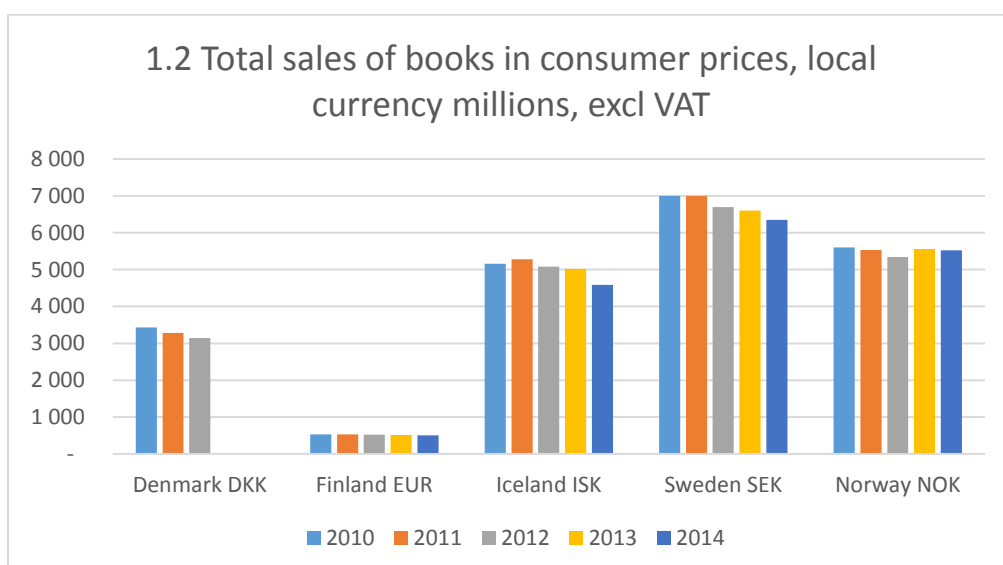
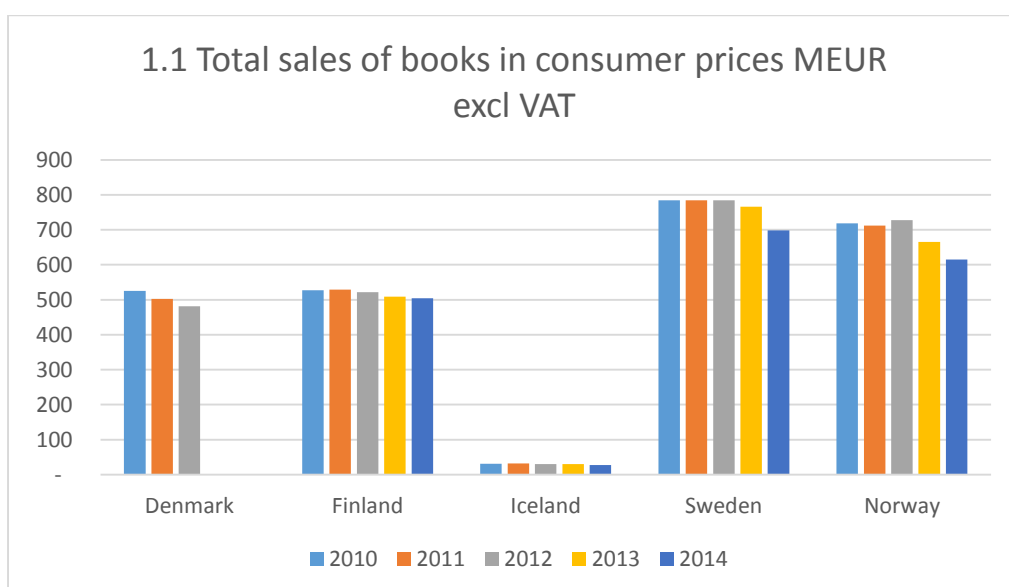
The charts below show an estimate of the total book market, made by the publishers association in each country. The percentage includes both paper books, other physical products and digital downloading/streaming.

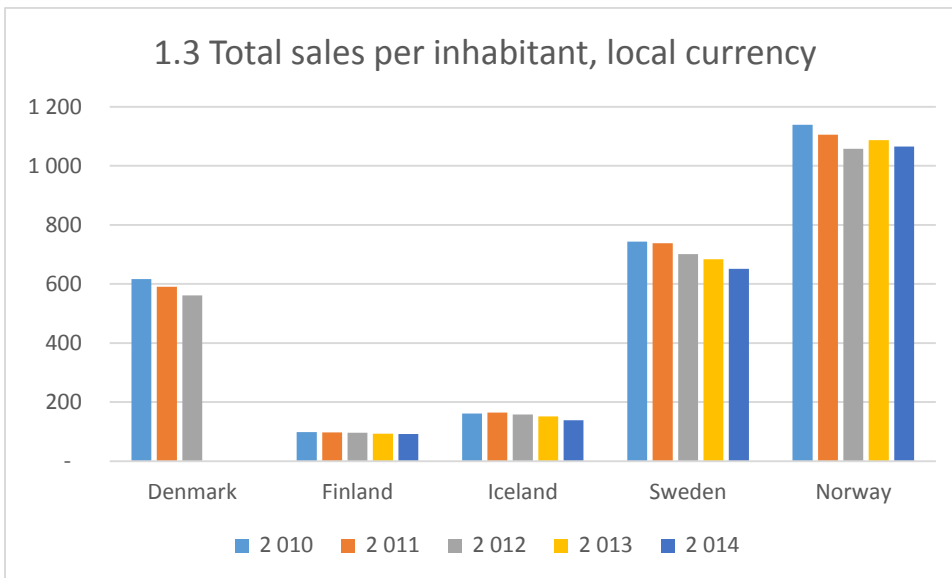
Figures are based on estimates of the relationship between the publisher's price and the consumer price in different sales channels and of the market outside the publishers associations.

Private imported books are not included.

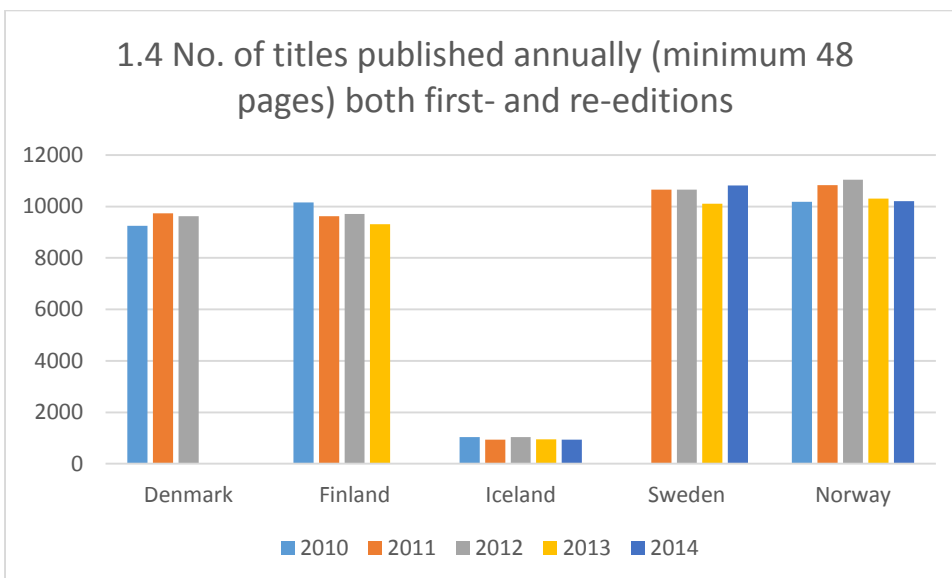
Denmark does not have consumer price figures for the last two years.

In the following chart, sales for Denmark, Iceland, Norway and Sweden are converted into Euros. This implicates that changes in the exchange rates affect the charts below. The big decline in Norway's figures in 2014 is mainly caused by weakening of the Norwegian Krone.





The Icelandic currency (ISK) is divided with 100 to make the chart readable. This chart shows the development in the turnover per capita in each country without influence in currency rate changes.



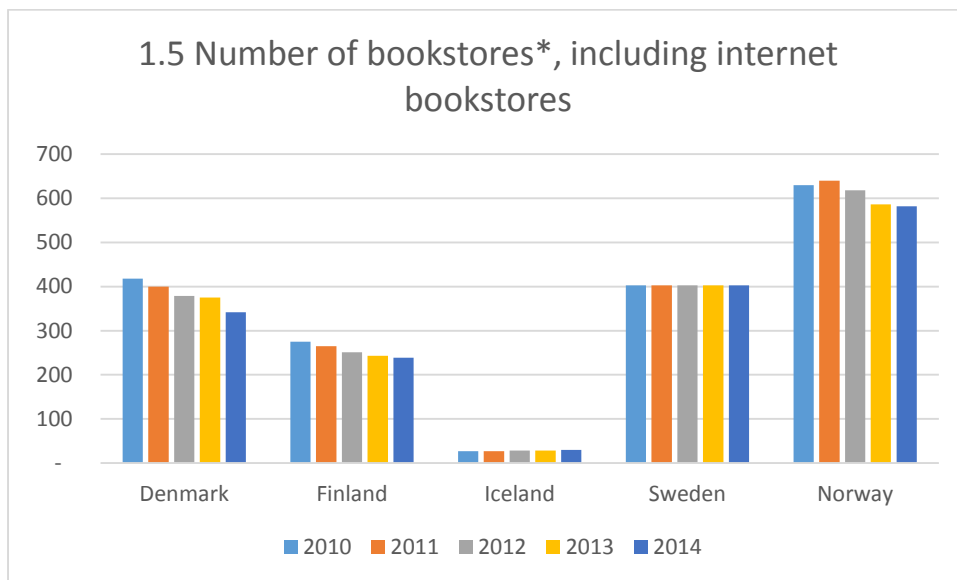
## Bookstores

In the deregulated markets in Sweden and Finland, there is no generally accepted definition of a bookstore. The count is therefore not precise.

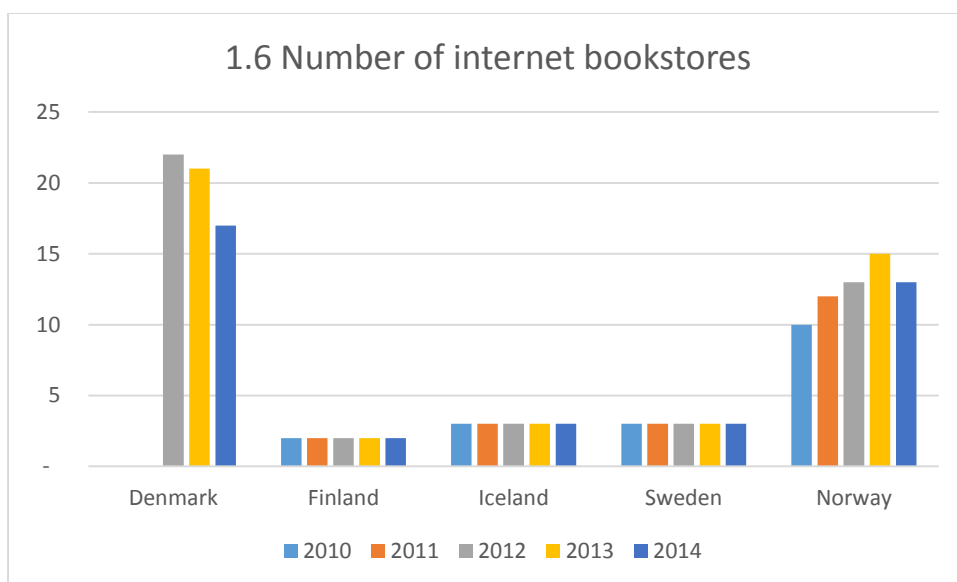
The figures for Finland, Sweden and Norway in this chart refer to stores with a wide selection of books. These countries have a large number of outlets outside the specialised bookstores, for example supermarkets, grocery stores, petrol stations.

Denmark and Norway with contractual relationships between publishers and booksellers can produce more precise statistics on the number of bookstores. In this chart, the figures for Denmark show stores with more than 200 titles in stock.

Finland: There are in total 239 bookstores, whereof 164 are members of the bookstore association.  
 Denmark: 37 of the physical stores are academic bookstores. 10 physical bookstores are located in Greenland and the Faroe Islands.



\* Members of the bookstore association



Norway: Due to merging of companies the number of internet bookstores has decreased in 2014.

## FIGURES REGARDING MEMBER PUBLISHERS

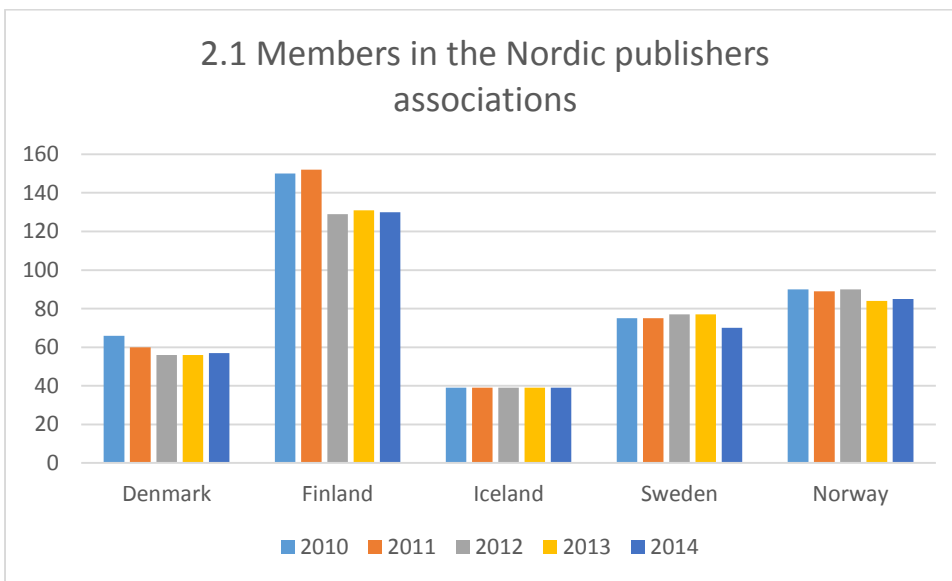
(Members of Nordic publishers associations)

The information in this chapter is based on member publisher figures only, except Denmark where the total market figures are used (estimated to cover 85% of total market).

All attempts to count the number of publishers in a country will show different results, due to definitions and methods used. There is a core of professional publishers with continuous activity and annual programs. In addition to that, there is a large number of semi-professional and hobby publishers, all contributing to the total output of books.

The sale and distribution in the trade market compared to the professional/educational market is significantly different in each Nordic country. We have therefore chosen to show the trade market on the following pages.

### Membership



The chart above includes the following associations:

Denmark: Forlæggerforeningen (Danish Publishers Association)

Finland: Suomen Kustannusyhdistys ry, Finlands Förlagsförening (The Finnish Book Publishers Association) and Suomen Kirjankustantajat

Iceland: Félag íslenskra bókaútgefenda (Icelandic Publishers Association)

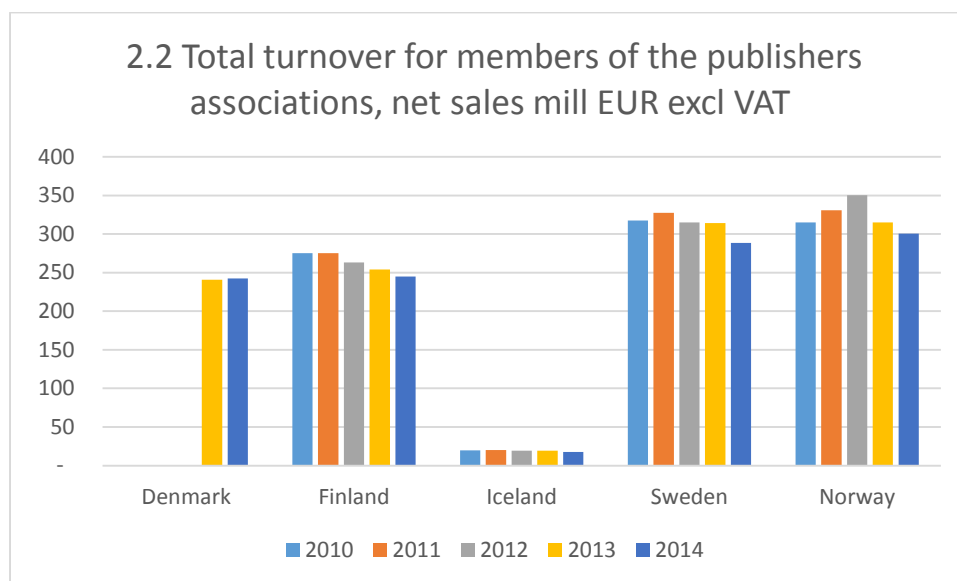
Norway: Den norske Forleggerforening (The Norwegian Publishers Association)

Sweden: Svenska Förläggareföreningen (The Swedish Publishers Association)

Föreningen Svenska Läromedel (The Swedish Association of Educational Publishers)



## Total turnover



The chart shows the member publishers' net sales of books in million Euro. The figures includes all formats (paper books, other physical products and digital downloading) and all literary categories (trade market, professional/educational market and library market).

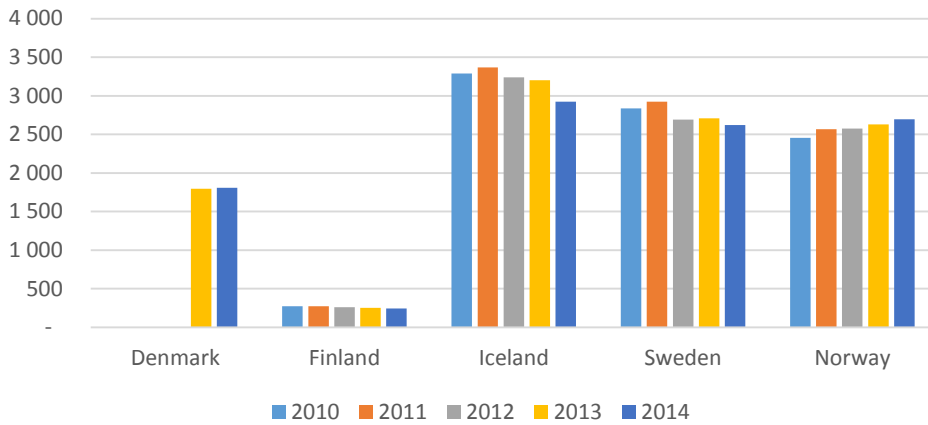
Sales for Denmark, Iceland, Sweden and Norway are converted into Euros. This implicates that changes in the currency rate affect the charts. The big decline in Norway's figures in 2014 is mainly caused by weakening of the Norwegian krone.

Iceland: Booksale in Iceland has decreased for the last three years. After the economical crises it dropped slower than other products but now it seems like it's still going down while other goods are picking up in sale.

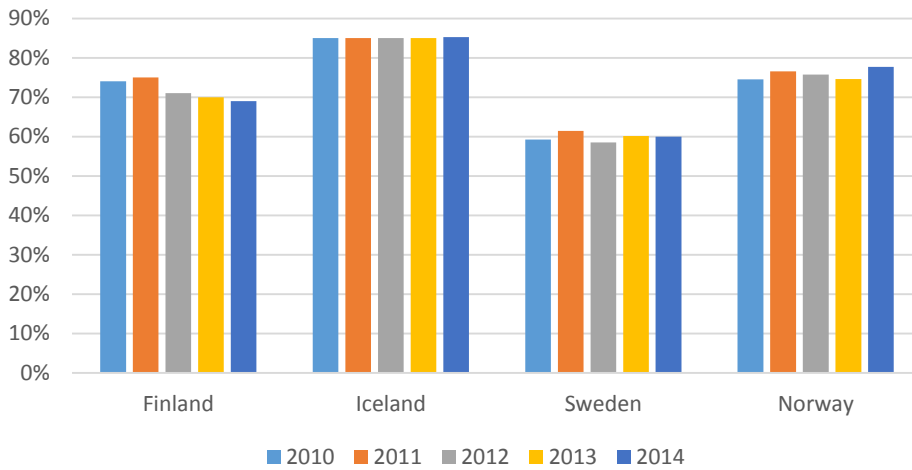
Denmark: Figures includes members and non-members. Print and e-books, licenses are not included. Market share is estimated to approximately 85 %.

Sweden: Figures does not include postgraduate studies, university and college, and will therefore affect the shares of channels, literary categories and formats, in this chapter.

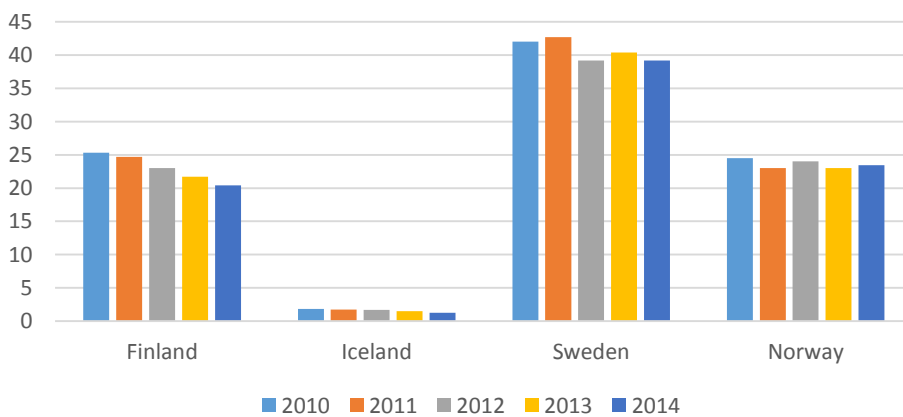
### 2.3 Total turnover for members of the publishers associations, net sales in local currency excl VAT

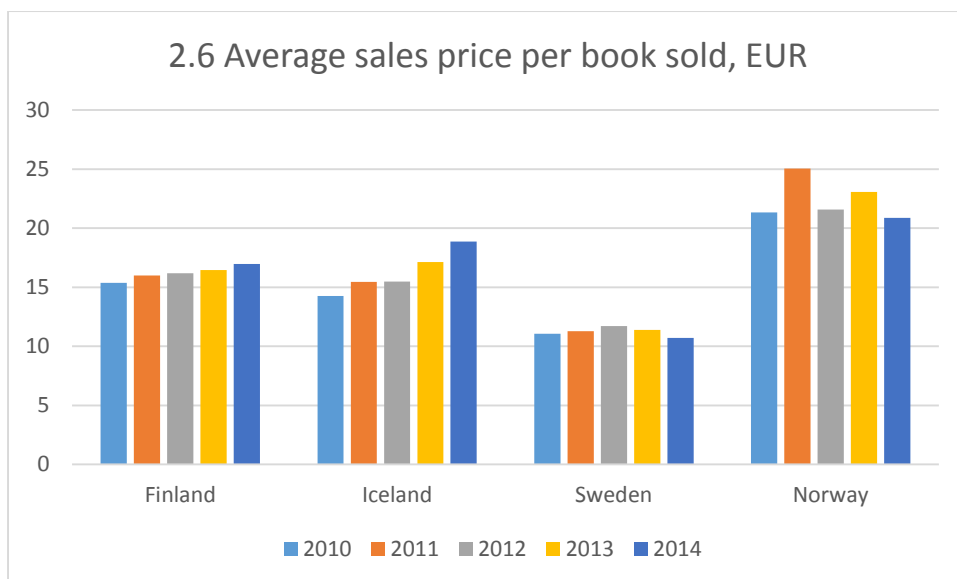


### 2.4 Member publishers share of total market



### 2.5 Number of copies sold, mill ex





Based on turnover for member publishers estimated in consumer prices, divided with number of copies sold. Denmark does not have figures regarding numbers of copies sold.

	<b>Average book price consumer prices EUR</b>	<b>Price level index 2014**</b>	<b>Average book price adjusted with price level index</b>
<b>Sweden</b>	10,7	1,09	9,8
<b>Finland</b>	17,0	1,00	17,0
<b>Norway</b>	20,9	1,32	15,8
<b>Iceland</b>	18,9	1,09	17,3

\*\*Statistisk sentralbyrå's price level index, Price level index is defined as purchasing power parity divided with currency rate. The price level index expresses the price level for a given country, related to one or several other countries.

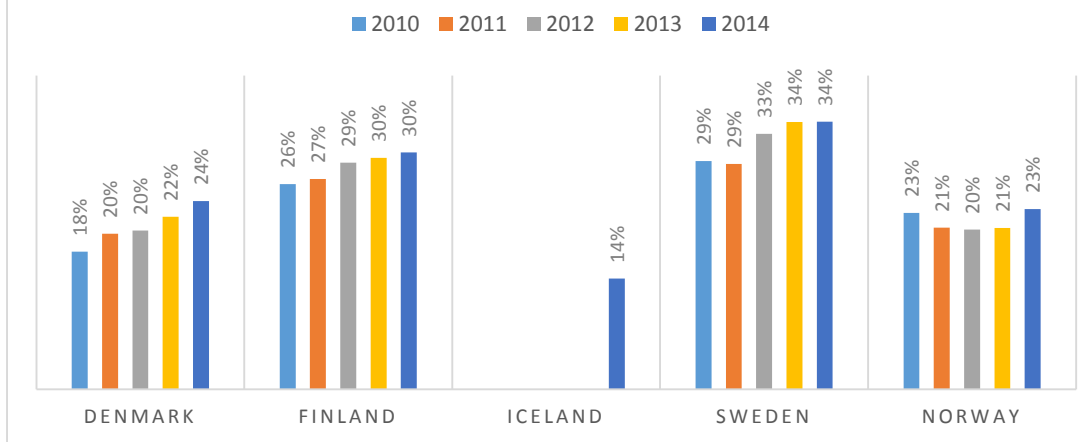
## Net sales per literary category

The following charts show the proportion of publisher's sales per category in percent of total sales. The percentage includes both paper books, other physical products and digital downloading/streaming.

Iceland: Over 90% of all educational material for 6-16 years old is published by the National Centre for Educational Materials. It's included in these numbers but it has to be pointed out that their prices are merely just printing prices. Iceland does not have figures for 2010 – 2013.

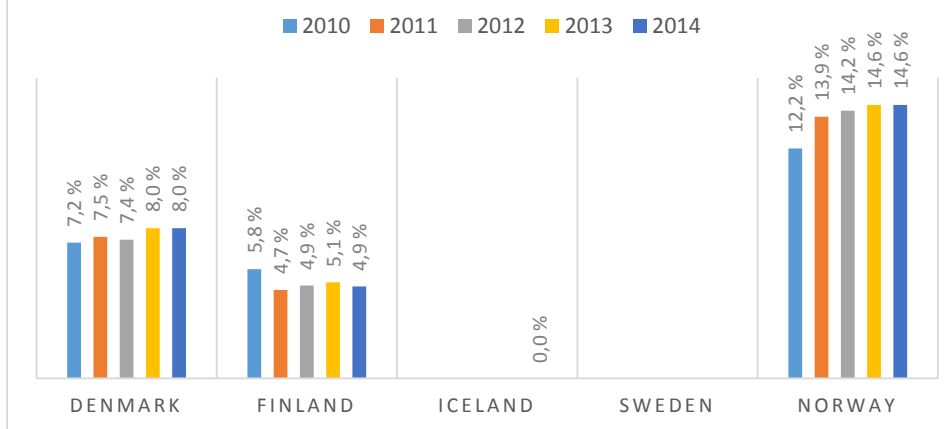
Sweden: There is no collection of data for sales per channel of books for postgraduate studies, university and colleges. That means that these sales figures are not included in any other category either, and will therefore effect the percentage share of the other categories.

## 2.7 Textbooks for compulsory school and upper secondary school



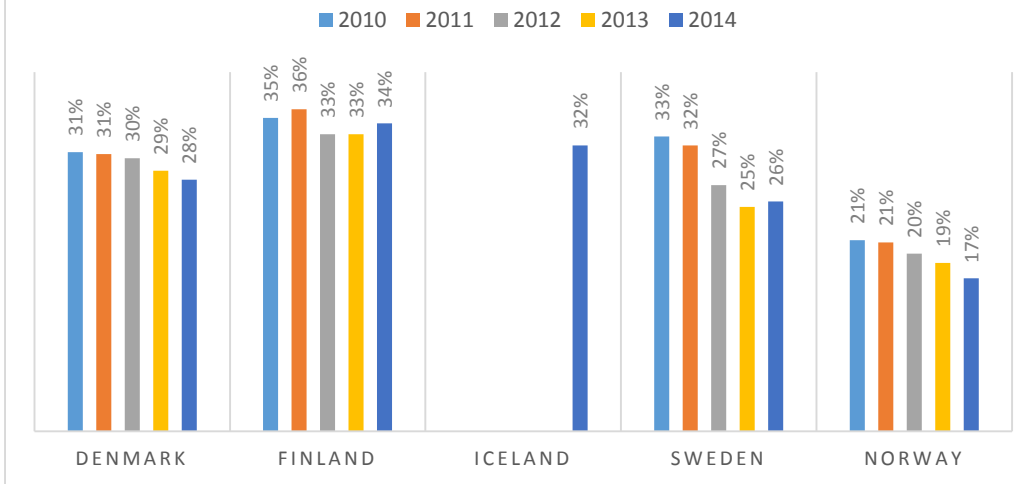
Sweden: A major curriculum reform in 2011 led to schools buying new textbooks etc and increased the sales. There has also been a rise in number of pupils.

## 2.8 Books for postgraduate studies, universities and colleges



Iceland: Textbooks for university and college are included in the non-fiction numbers.

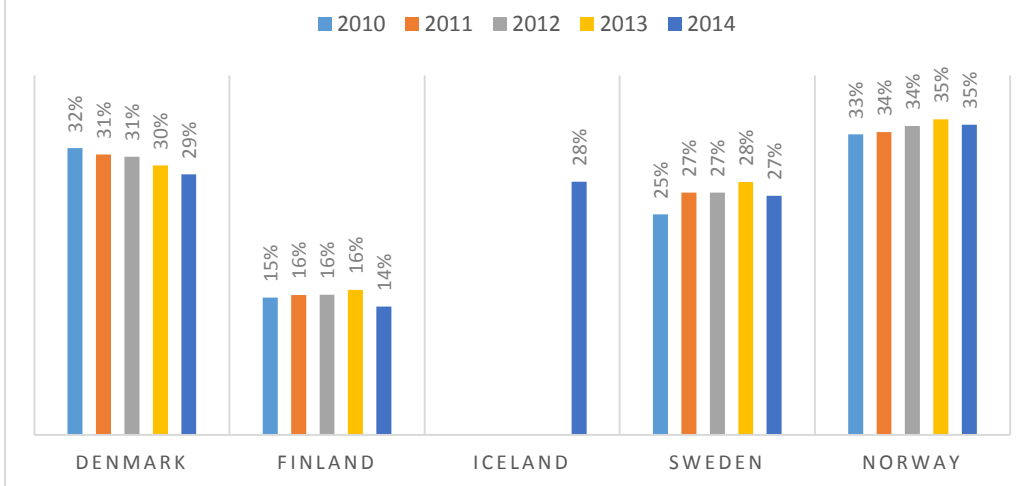
## 2.9 General non-fiction adults

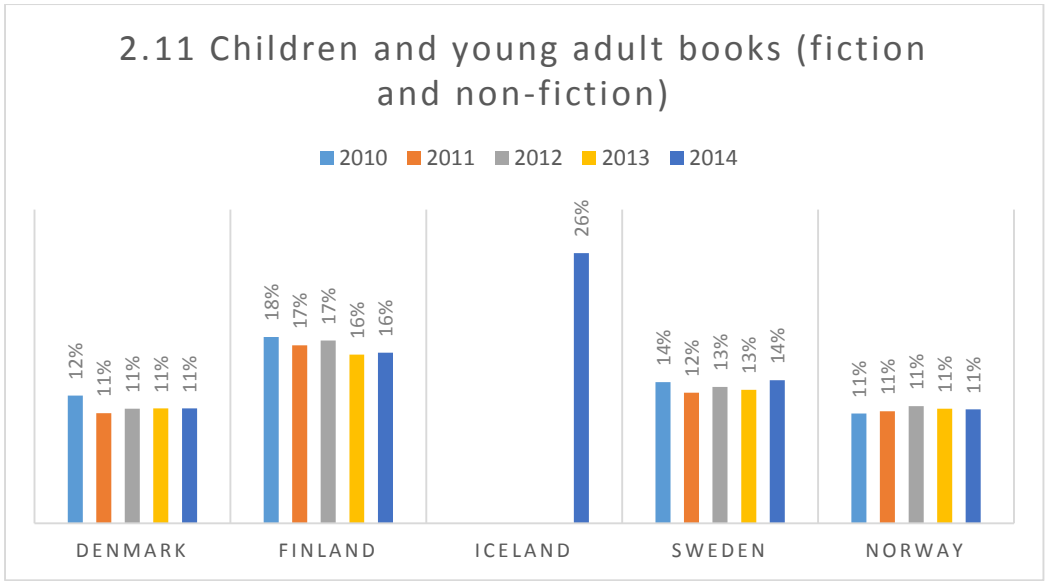


Finland has a history as a non-fiction land, in early 1980's non-fiction was 40% of total sales and 65% of the general fiction/non-fiction sales.

Norway: The decrease from 2010 to 2014 is 4 % and is mainly related to the increased availability of information on internet, most of it free of charge, i.e. encyclopedia and law, recipes and other non-fiction.

## 2.10 Fiction adults





Finland's figures also includes comics.

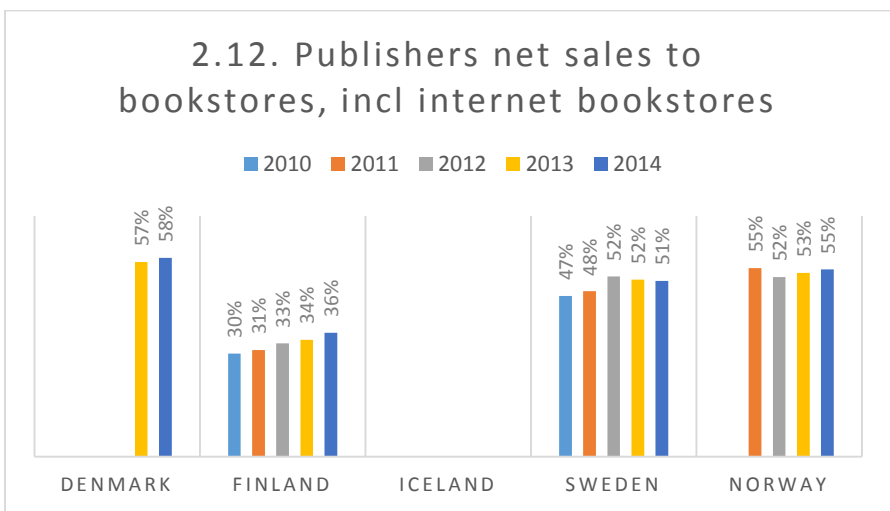
## Net sales per channel – Trade market

The following charts show the proportion of member publisher's net sales of trade through different sales channels, as percent of total trademarket sales.

They do not show the market share of the different sales channels in terms of sales to consumers. The percentage includes both paperbooks, other physical products and digital downloading/streaming.

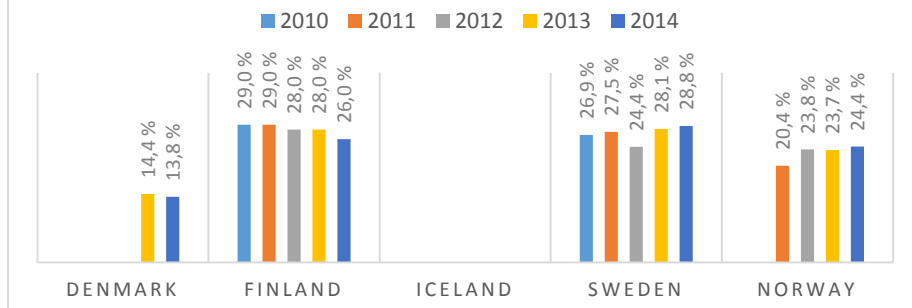
Iceland does not have numbers divided per channel.

Denmark figures include both members and nonmembers (estimated to cover 85% of total market).



Sales to internet bookstores covers pure internet bookshops which have the internet as their sole or primary sale channel.

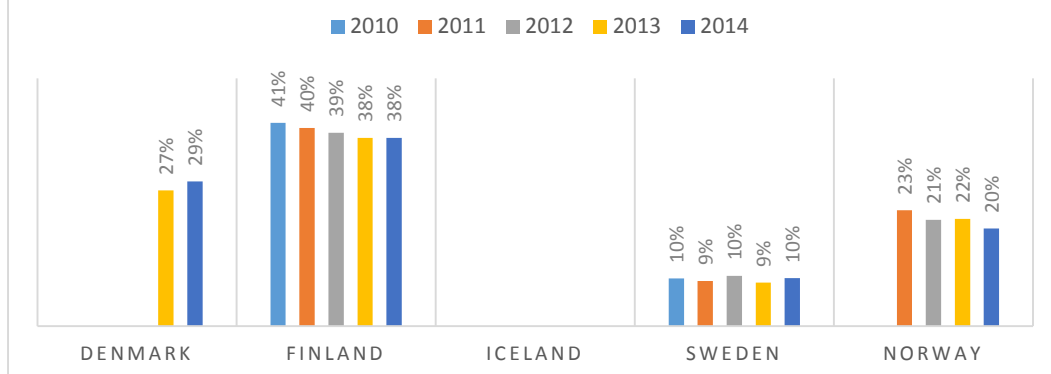
## 2.13 Publishers net sales to department stores and wholesalers



Sales to other retailers including supermarkets and drug stores.

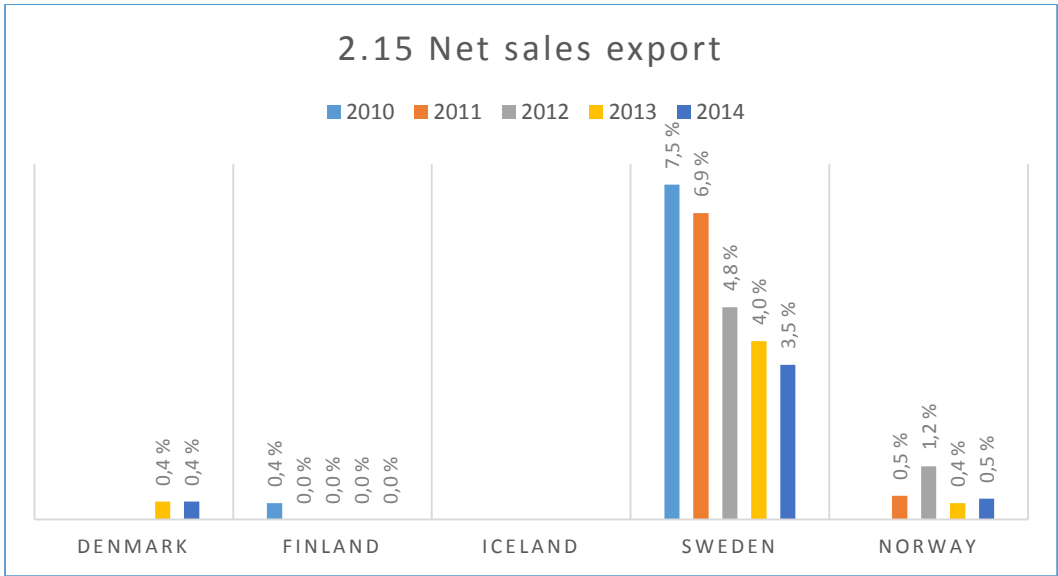
Finland: Figures includes also sales to wholesalers who directly sells to libraries and schools. Export figures are included in these figures, and the total share is estimated to be lower than 0,5%.

## 2.14 Publishers net sales directly to consumer and institutions



Denmark: The figure includes sales to consumer's incl. sales via own book club, also direct sales to public institutions, incl. libraries and educational institutions and private schools.

Finland: The figure includes sales via publisher's own book clubs and direct sales from publishers.



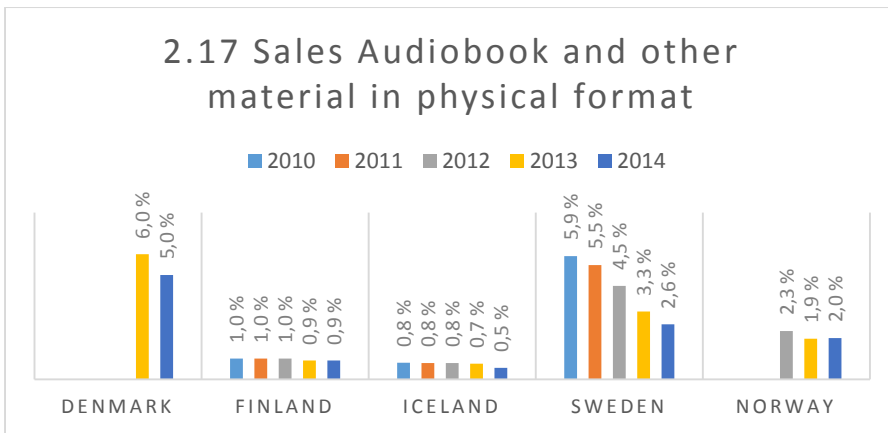
Norway: The largest share is regarding higher education and professionals, and digital sales also covers quite a big share.

Sweden: The relatively high share of export sales for Sweden for the 2010 and 2011 is largely due to the Millennium series, but also to the big interest in Swedish crime literature in common that the series brought. Books in Swedish are also sold in Finland and to some extent in the other Nordic countries.

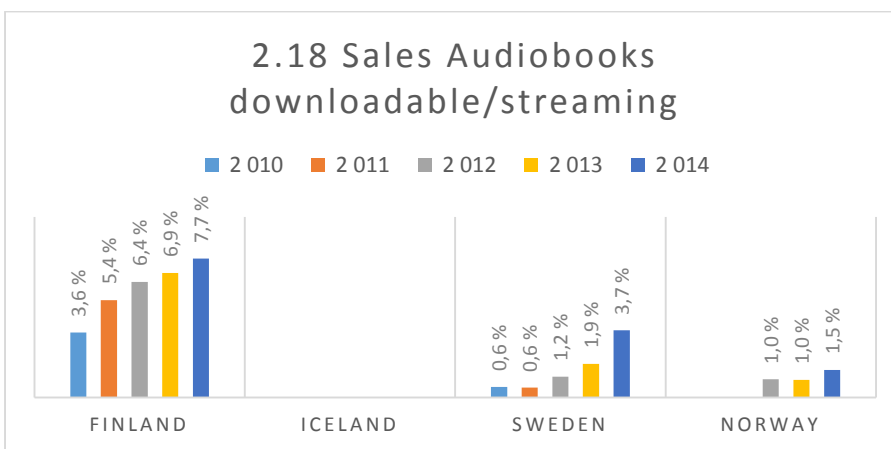
## Net sales per format – Trade market



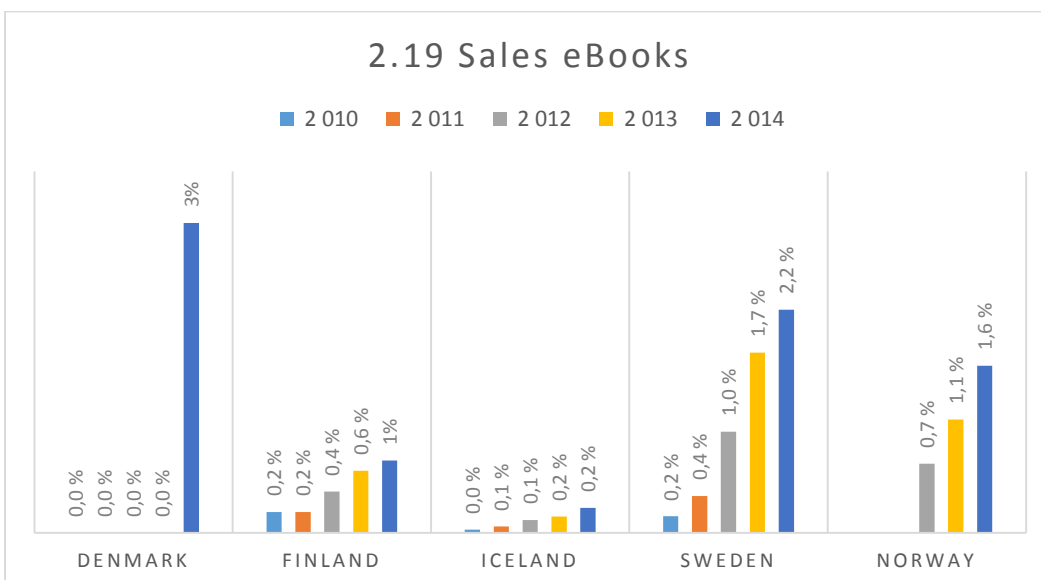




Denmark: Audiobooks includes also audio downloadable/streaming.



Denmark: Includes sales to Netlydbog and eReolen (digital library) and audio books in subscriptions, fx Storytel, and I-books.



Denmark: Physical and downloadable/streaming and via apps. Incl. sales to eReolen (digital library) and e-books in subscriptions, fx Mofibo.

Iceland: Figures for e - books includes downloadable/streaming.

# THE DIGITAL MARKET

## Denmark

The digital share of total revenue increased from 12% in 2013 to 14.3% in 2014.

Within the sales of learning materials the digital sales constitute 28.6% while in the trade (ie sales of fiction and non-fiction and children's and youth literature) this figure is 7.8%.

The Danish Publishers Association estimates that e-book sales in 2014 amounted to 5.2% of publishers' trade turnover, while audiobooks accounted for 2.6%.

Within trade, the digital demand is greatest within fiction at 12.1% of trade revenue. 45% of publishers' sales of fiction for online trading was digital, and 46% of the direct sales of fiction to public institutions (mainly libraries) was digital.

Sales of books for children and youth has the smallest digital share of 2.9%.

The digital sales of learning materials increases by 16%. The increase is due not least to the Government and KL's (Local Government Denmark) project «IT in elementary schools», where they in the period 2012-2017 have earmarked almost 500 million kroner in state subsidies for municipal purchases of digital learning resources. Municipalities co-finance 50% of the purchase.

## Finland

### Internet sales

We know that at least 8% of total value of printed books have been sold via internet in 2014. We have no exact knowledge from the sales of overseas book sales to Finland via internet. We estimate that the total share of internet sales is 10 - 13 % and increasing slowly.

### E-books and digital audio books

Since 2007 the sales of E-books have increased erratically. In 2014 the sales increased 17 % and were 7% of total digital sales and 0.6 % of publisher's total sales.

Sales of digital audiobooks were decreasing from 2010 to 2012 (59 %) and increasing from 2012 to 2014 (137 %). In 2014 sales were 1% of publisher's total digital sales and 0.1 % of publisher's total sales.

### Streaming

Increasing part of digital audiobooks and e-books are distributed in streaming format instead of downloading. Main part of online-publications (other streaming material) are distributed in streaming format and represent about 80 % of digital sales.

## Sweden

### Internet sales

When including non-Swedish online retailers the online sales currently account for nearly half of total bookstore sales in Sweden.

### E-books and digital audio books

The market for e-books and digital audio books still is limited but is increasing quickly. Downloadable and streaming audio books have outgrown audio books on CD and other physical media and now make up 4 % of publishers' total sales. E-books account for about 2 % of publishers' sales but is rapidly increasing. The number of new e-book titles amount to 28 % of all new titles. Some of the new e-book titles are re-editions of "classical" books.

### Streaming

Mainly due to an increased number of streaming services available and the easy access to such services through smart phones, streaming audio books have seen a sharp increase in Sweden. We have no information as to what the respective share of downloadable and streaming audio books amount to, but streaming audio books have been quite successful.

## Iceland

### Internet sales

There are three internet bookstores in Iceland, all of them working closely with physical bookstores. We do not have information on the turnover from these bookstores, but we estimate that bookselling on the internet is somewhere between 4–8% of the total market for Icelandic books and it is slowly increasing.

There are no information available on imported books to Iceland. We estimate that at least 50% of the total market of imported books is bought on the Internet.

### E-books and digital audio books

The sale of e-books has increased 40% between 2013 and 2014. E-book sales account for 0.25% of the total book market, excluding audio downloads.

The same amount of e-books, around 60 new titles, were published in 2013 and 2014.

We do not have information about the ratio between physical and downloadable audio books, but there was a 33% decrease in sales between 2013 and 2014.

## Norway

The digital share of total revenue increased from 6.7 % in 2013 to 8.2 % in 2014.

### E-books and digital audio books

The operations of The Norwegian Book Database (DnBB), owned by the leading publishing houses, booksellers, and distributors in the Norwegian market, have since 2011 expanded to include distribution of e-books. This cloud based database enables accessing and reading Norwegian e-books on multiple e-reading

devices, and it allows the purchaser to assemble all her books in the same application, regardless from which bookstore she purchases them.

Most publishing houses that offers both paper books and e-books, now generally offers the same adult fiction title in both formats simultaneously. In 2014, 1748 e-books, whereof 1645 general literature, were published by Norwegian publishers. Member figures shows 1311 e-books, whereof 1257 general literature.

Since the establishment of a common e-book distribution system in 2011, the sales of e-books keep increasing. In 2014, e-book sales made up 1 % of the publishers' trade turnover (member publishers). However, the e-book sales in consumer prices increased by 36.5 percent from 2013 to 2014 (including general literature and books for universities, colleges and postgraduate studies).

Sales of books for children and youth, as well as nonfiction for all ages, have a much smaller digital share than adult fiction.

Sales of digital audiobooks (downloadable and streaming) increased from 0.6 to 0.9 percent of the trade turnover (member publishers) from 2013 to 2014.

### Digital learning resources and Streaming

Streaming and digital learning resources in all categories (general and educational) account for 5.3 percent of the total turnover. Educational content represents circa 90 percent. However, when it comes to general literature, both e-books and audio books are available for streaming, and the selection consists mainly of backlist titles.

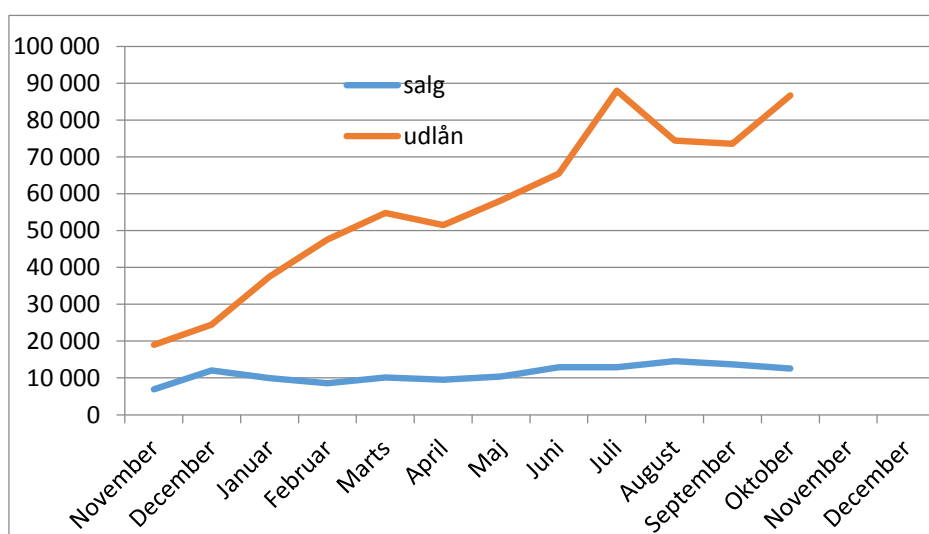
## LIBRARY AND E-LENDING

### Denmark

#### eReolen.dk 2011-2013

Chart 1 shows the amount of copies sold by publishers to libraries (red) and the commercial market (blue) during the period where publishers offered their books to libraries on eReolen, in a frictionless click based model.

Chart 1 – number of copies  
Nov. 2011 – Oct. 2012

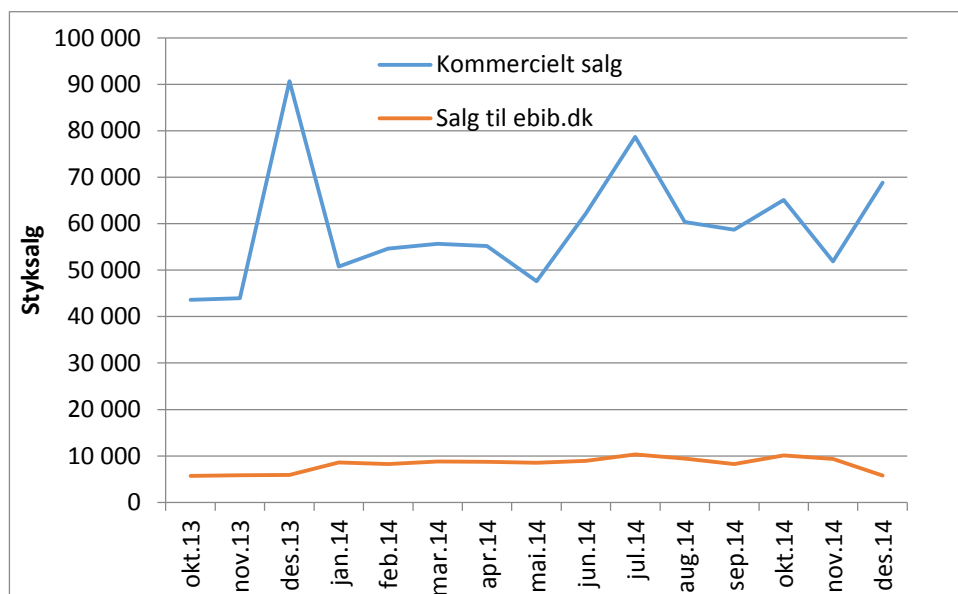


## eBib.dk 2013-2015

Chart 2 shows The Danish PA's statistics on lending and sales of e-books for selected publishers who provide e-books for lending on eBib.dk, a license based lending model. eBib.dk was introduced by the largest Danish publishers to create friction and thereby secure a more balanced development of the library and commercial market respectively.

Chart 2 – number of copies

Oct. 2013 - Dec. 2014

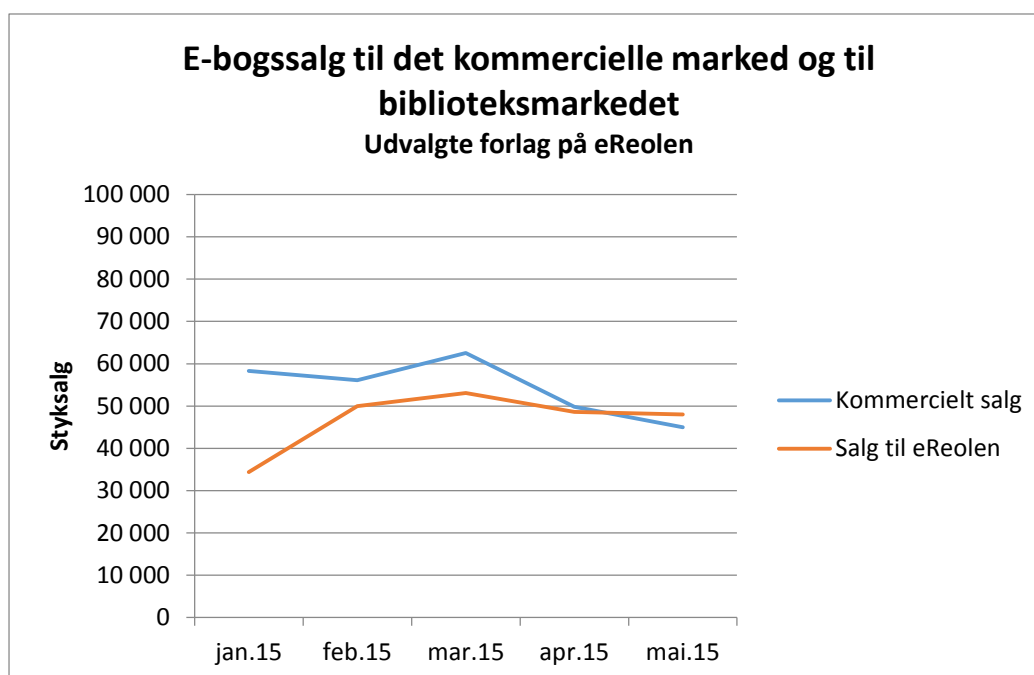


## eReolen 2015 ff

Chart 3 shows The Danish PA's statistics on lending and sales of e-books for selected publishers who provide e-books for lending on eReolen, a new combined license and click model which brings together titles from eReolen and eBib and audio books in a single frontend. The model is flexible, allowing publishers to choose either a click model or a licensing model, where the title after 6 months transfers to click. There is also the opportunity to let the title stay in a license model.

Chart 3 number of copies

Jan. 2015 – mai 2015



## Finland

In Finland the first steps in lending e-books from libraries were taken in cities Salo and Pori the beginning of 2000s. Systematic activities began in 2002. Statistic are not much available, but a few numbers has been noted.

Per 2014 there is available 2 700 domestic titles and 2 500 foreign titles. About 40 % of e-books published by members of The Finnish book Publishers Association are available. In 2014 e-books are included first time in statistic of common libraries (tilastot.kirjastot.fi), and reports 151 000 loans. The statistic concerning collection may contain overlapping. After estimation of Library of Helsinki there are available about 6 000 e-book titles.

## Sweden

Sales to libraries still account for the vast majority of e-book sales and in 2014 it amounted to more than 80 % of total e-book sales in number of copies sold. On the contrary audio books have a greater share of sales to consumers, at about 60 %.

The previously dominant model in Sweden which fixed the price to 20 SEK per loan was abandoned since the costs for the libraries grew too high and publishers did not get reasonably paid.

The publishing houses are now negotiating directly with the libraries and SKL (the Swedish Association for Local authorities and Regions) and the publishing house Natur & Kultur has made an agreement with SKL.

The signed agreement includes no waiting period for front list e-books, but in return the charges are increased.

## Iceland

E-lending in libraries has not started yet but negotiations are ongoing.

## Norway

### E-lending

The Norwegian PA has adopted a common strategy for e-lending, which has been accepted by library organizations. The current overdrive model is a straight one at a time-license, and is part of a trial project running throughout 2015. However, the PA and the library organisations are at this time discussing strategies and models for 2016.

Currently, 2500 e-titles are available in Norwegian libraries. However, the selection differ from one library to another. The Norwegian Cultural Fund purchases to libraries 70 e-books and 703 paper copies of each title of adult fiction, and 70 e-books and 1480 paper book copies of children and young adult titles. This comes in addition to the e-books purchased through ordinary sales from publisher to library.

### The Bookshelf project

The national collecting society, Kopinor, and the National Library has signed an agreement for digital books on the Internet. Through the project, called Bokhylla.no ('Bookshelf'), most Norwegian titles up to and including the year 2000 will be available for reading on the Internet, though limited to Norwegian IP-addresses. The bookshelf project includes more than 100.000 titles, and the aim is to reach 250.000 titles within 2016. Authors and publishers may withdraw books from the project.