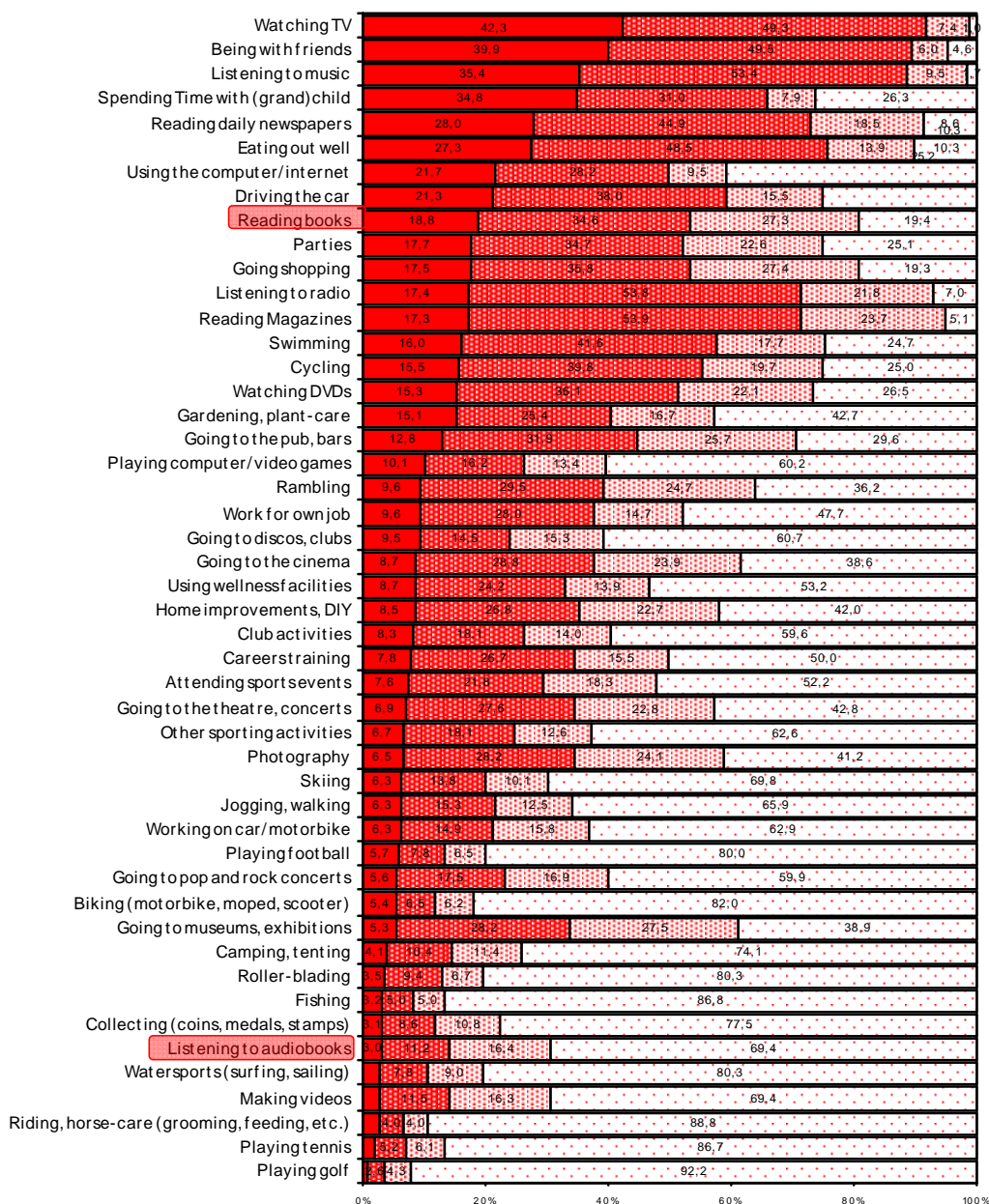


## Books and the book trade in figures - 2010

### The importance of books

Books have continued to occupy a good ninth place in the rankings of the most popular leisure activities which list 48 activities. TV, listening to music, being with friends are more popular than reading books, as are – a new option – spending time with children/grandchildren. Reading the newspaper, eating out, using the computer/internet and driving the car have each dropped a place.

Fig.1 : Popularity of leisure activities 2009 (in percentages)



Source: VerbraucherAnalyse 2009, Bauer Media KG

■ like very much ■ like ■ don't like much ■ not at all



This year too, women are still shown to be more interested in books than men are. The correlation between education and income is still apparent. At 44 per cent, however, the proportion of young people using books daily or several times a week has risen slightly compared to the previous year.

### The economic development of the German book market

The industry's sales turnover increased in 2009 by 0.8 per cent to just under 9.7 billion euros, having risen by 0.4 per cent in 2008. The classic retail book trade ended 2009 with a zero in the black (+ 0.1 per cent), having had to take a loss of 1.5 per cent the year before. Department stores suffered yet another considerable drop in sales at a figure of just under 20 per cent. Book clubs also registered a drop of 20 per cent, after a decline of 1.8 per cent in 2008. The mail order trade was the big winner again in 2009, increasing its sales by 11.4 per cent. But this increase is entirely accounted for by online book sales which are estimated to have risen by around 15 per cent.

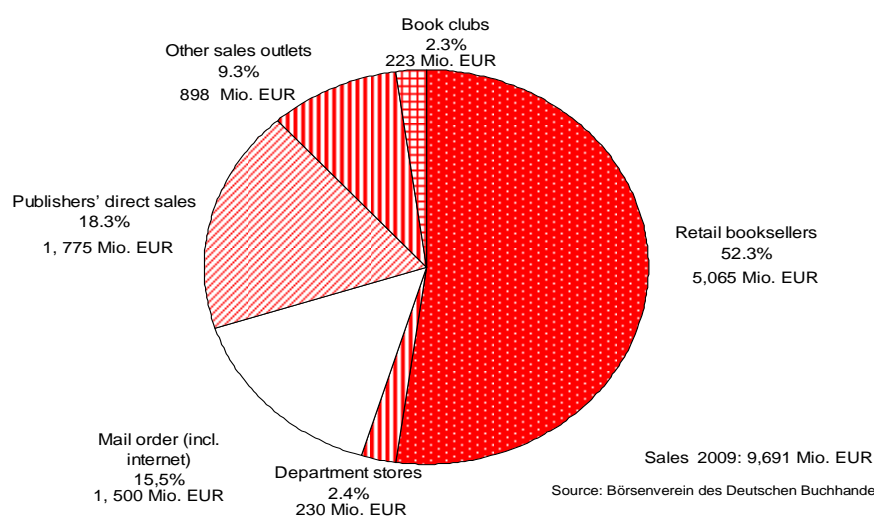
After an only small increase of 0.6 per cent in 2008, sales for German book publishing companies rose by a clear 3.8 per cent in 2009.

### Market structures

As of May 2010, the Börsenverein des Deutschen Buchhandel – German Publishers & Booksellers Association – had 5,787 members, including 1,833 publishing companies and 3,814 bookselling businesses.

With a share of 52.3 per cent of total book sales, the retail book trade is still by far the most important sales outlet for books. But the share held by the traditional bookselling trade reflects long-term decline. In 1997, bookshops still accounted for 59.3 per cent, in 1985, this figure was actually 64 per cent. There has been a 0.3 per cent loss in the book trade's share of sales in comparison to 2008.

Fig. 2: Estimated book trade sales at consumer prices 2009



### **Sales breakdown by subject groups and editions**

A breakdown of sales according to subject groups and type of edition shows that in 2009, the biggest proportion of hardback editions was accounted for by belle-lettres (= Belletristik) at 20.3 per cent. How-to manuals followed in second place at 17.1 per cent, together with children's and teen books, also at 17.1 per cent. In the case of paperbacks, 69.4 per cent of sales were accounted for by sales of belle-lettres titles, with only single-figure percentages remaining for all other subject groups. This was also the case for how-to manuals (6.5 per cent). Audiobook sales consist primarily of belle-lettres titles too, accounting for 47.3 per cent of sales, and so once again, 7 percentage points more than in the previous year. But children's and teen books are also important when it comes to sales of "talking books", accounting for 33.3 per cent.

Narrative literature dominates for all types of edition within the belle-lettres subject group. For hardbacks, its share of sales is 45 per cent and in the case of audiobooks 39.9 per cent, indeed, as much as 49.8 per cent when it comes to paperbacks. But sales shares have declined slightly in every case here, whereas crime fiction (thrillers) was able to increase its relatively high share yet again, in particular for paperback editions (32.8 per cent compared to 31.5 per cent in 2008) or in audiobook format (32.6 per cent, compared to 29.4 per cent the previous year).

Compared to narrative literature and crime fiction, the other genres categorised as "belle-lettres" are relatively insignificant. Gift books are another source of sales for hardback editions (12.8 per cent), as well as humour/cartoons/comics/satire (11.1 per cent). The latter also contribute a 15 per cent share to the sales of audiobooks.

When it comes to hardback how-to manuals, food and drink lead the field (25.6 per cent), followed by books relating to health topics (16.8 per cent) and self-help/everyday living (15.1 per cent). In the case of paperbacks, the self-help/everyday living category actually accounts for 44.4 per cent of sales, followed in second place by health books (18.6 per cent) and in third by books in the spirituality category (15.3 per cent). Health-related titles dominate how-to manuals as audiobooks with a sales share of 35.8 per cent. In the non-fiction group, hardback rankings are led by politics/society/business at 28.2 per cent, followed by dictionaries/reference books at 21.4 per cent and history with a 14.1 per cent share.

### **Variety of subject-matter in German publishing**

2009 saw a slight decline again in the number of titles produced by German book publishing companies - by 1.2 per cent to 93,1000.

The subject groups belle-lettres (17 per cent) and German literature (12.3 per cent) accounted together for almost a third of all first editions in 2009. Children's and teen books reached 9.1 per cent of new production/first edition title totals, travel/geography made up only 3.5 per cent of new titles, which meant that they still trailed behind books on religion (4.7 per cent), for example, or those in the medicine/health category (4.8 per cent).

The number of first edition paperback titles rose again in 2009 as it did the previous year, reaching a total of 9,564 titles. In 2008, there had been 8,570 titles. The statistics for 2009 show that the proportion of paperback first editions out of all first editions published by German publishing companies was 11.7 per cent.

The belle-lettres category continues to dominate when it comes to paperback title production. At 46.7 per cent, it accounts for almost half of all paperback first editions. If the remaining literature titles are added, this makes up more than two-thirds of paperback production at 71.2 per cent. Children's and teen books also account for a considerable proportion at 9.7 per cent of paperback first editions.

In comparison with hardback books, the belle-lettres category also continues to play the strongest part. 32 per cent of all new novels published in 2009 were paperbacks. In the overall category of literature, paperbacks accounted for an 18 per cent share of all first editions published in 2009.

## **Business with other countries**

### **Translations**

The number of translations (first editions and reprints) declined slightly in 2009 from 11,903 to 11,800 titles. English continues to dominate as the language of origin for translations into German, accounting for a total share of 64.9 per cent.

French made up a share of 10.2 per cent, ranking second as in previous years. All other languages follow considerably further behind, with only slight changes in the past five years when it comes to the composition of the list of most important translated languages. The high proportion of Scandinavian languages is still striking, with world language Spanish remaining stable.

Overall, the lively exchange of translations over the years is a reflection of an industry that may indeed develop within the protective boundaries of its own language, but is always alert to the international perspective and in its programming, has long since anticipated the progress of globalisation.

### **Rights and licences**

This is equally apparent when it comes to consideration of rights and licences sold abroad. The opening up of the Far East to the world economy has long since been a fact of life for German book publishing companies. Chinese and Korean, the languages previously in first place, were overtaken in 2005 by Polish and Czech, and in 2008, by Polish and Russian. In 2009, Polish held on to first place, with Chinese returning to second, followed by Czech. Russian dropped to eleventh.

As in 2008, Poland and China led the field of countries acquiring rights and licences in 2009. 524 titles were licensed to Poland in 2009, a figure at only 294 in 2000. China acquired 491 rights or licences in 2009, but there had already been 403 licence sales in 2001. Publishing companies in the Czech Republic obtained 434 licences last year.

The ten language regions with the most requests include three in Eastern Europe, namely Polish (8.4 per cent), Czech (6.8 per cent) and Hungarian (4.8 per cent). There has been a long-term decline in the granting of rights and licences for the languages of the traditional big western trade partners, English (5.3 per cent compared to 10.2 per cent in 1994), Italian (5 per cent compared to 7.8 per cent in 1994) and French (4.7 per cent as opposed to 8.1 per cent in 1994).

The willingness of publishing companies in the USA to purchase rights or licences for German titles has declined slightly in recent years and fell still further last year. The total of licences in the past year was 113 (1.8 per cent).

In considering rights and licence sales according to subject group, it remains striking, as in recent years, that German children's and teen literature is the most sought-after rights and licence genre in non-German-speaking countries. It accounted for a 33 per cent share of licences granted, compared to only 12 per cent in 1994. In 2009, rights and licences for the largest number of children's books went again to China. The belle-lettres category was not quite able to retain its share of rights and licences sold and now stands at 10.6 per cent (having still held a 12.6 per cent share in 2007). But it should be noted that a restructuring of subject group breakdowns in 2005 makes it difficult to compare today's and earlier figures. The category belle-lettres (or "Bellettristik") was subdivided further into literature, entertainment and poetry, whilst a new feature has been a division of non-fiction into various sections, alongside different sub-divisions in the category STM and academic books.

## Foreign trade

The import of book trade products declined minimally in 2008 to 1,078 million euros. This represents a 0.2 per cent minus, which was noticed primarily in developments relating to books. But figures for other products – apart from picture books – also show negative changes.

Among the most important countries of origin for the import of books, there had been movement at the top in 2007. Since then, the UK leads the field at number one and China follows in second place, having pushed the USA into third. Changes in international sales structures mean that countries frequently move around in the rankings, of which Ireland is a good example. Coming to what was previously a completely insignificant country as a publishing

company location, several international computer corporations have set up their European headquarters here since the 80s, and the manuals provided with their hardware and software products are now included in the foreign trade statistics. This means that although these are books, they are not in fact classical book trade items.

Book imports from the UK declined only slightly in 2008 from 128 million euros in 2007 to 127 million. This means that the UK's leading position continues unchallenged at a good 20 per cent share. Supplies from China showed a powerful leap forward in 2007, from 53 million to 85 million euros, and rose again in 2008 to 88 million. They now account for a good 15 per cent of imports. Imports from the

USA continued to decline in 2008, going from 75 million to 73 millions euros, and so at approx. 13 per cent, Italy still ranks fourth.

Austria and Switzerland remain unshakably and by far the leading recipient countries for German books and periodicals, sharing as they do a common language with Germany. This remained unchanged in 2008. In the case of books, Austria was able to defend its leading position despite a clear decline of 7.6 per cent, whilst exports to Switzerland showed a slight drop of 4.2 per cent.

When it comes to magazines and periodicals, the dominance of Austria and Switzerland as importers is equally strong. These two countries together account for an export volume of 342 million, or just under half of total exports. Here too, Austria is ahead by a nose, receiving exports worth 197 million euros.

26.8.10 G. Majer