

Selling Canadian Books In Germany

A Market Survey

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Management Summary

The German book market continues to be attractive for international publishers. Among 50 of the top leisure activities of Germans over 14, reading a book ranks 14th.¹ Just over 20% (20.7%) of Germans say they frequently read books, and another 28.2% do so occasionally. The rate of consumer spending on books is stable. Sixty percent of those questioned stated that they bought only printed books in 2013. For many years, the overall revenue of book sales has amounted to €9.5 billion euros.

At the same time, brick-and-mortar bookstores are losing ground to online bookstores, and the number of independent bookstores continues to decline due to closures or chain takeovers. In addition, printed book sales have been partially replaced by ebooks.

Nevertheless, 48.6% of the revenue mentioned above has been made by brick-and-mortar bookstores. The share of online bookstores amounts to 16.3%. In 2013, after years of often double-digit growth rates, there was a decline of 0.5% in online sales compared to the year before.

Still, ebooks contribute a growing share to total book-selling revenue. In 2013, this share amounted to 3.9%. The number of sold ebooks rose from €4.3 million in 2011 over €13.2 million in 2012 to €21.5 million in 2013.

The purchase of ebooks takes place mostly via large distributors,² but ebooks are also sold by physical bookstores. Seventy-nine percent of German booksellers offer ebooks and e-readers. Among German publishers, 65% offer digital products.

Canadian publishers can enter this market by offering licences (translations) or by selling the original edition. Success in selling the original as printed book depends on the genre. German bookstores only offer fiction books in foreign languages and these offerings are nearly all in English. Because of this, for many publishers, selling licences is the best way to enter into the German market.

On the other hand, the technological infrastructure and the willingness of German book buyers to order printed books or ebooks online is very high, which offers publishers the opportunity to reach German readers directly.

¹ *Buch und Buchhandel in Zahlen 2014* (Book and Book Trade in Figures 2014) (Frankfurt: Börsen-verein des Deutschen Buchhandels e.V., 2014).

² More details can be found in the "Ebook markets" section of this report.

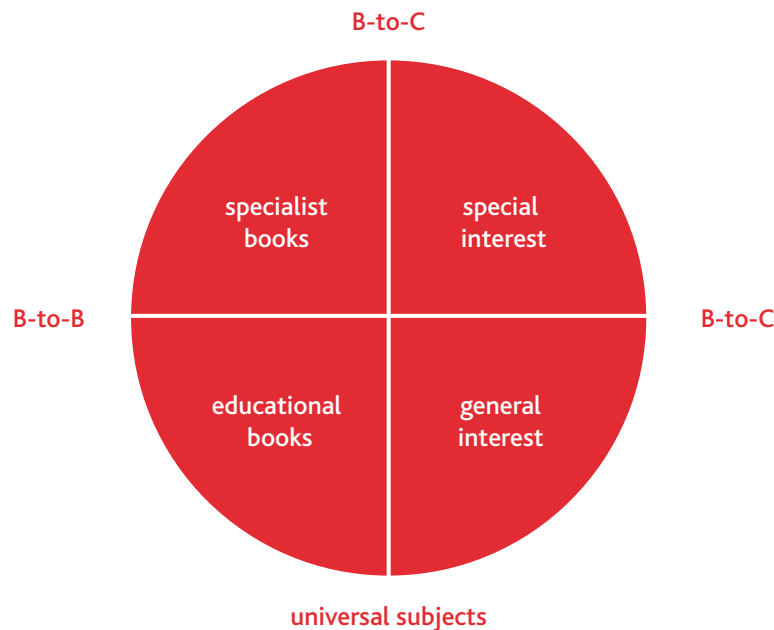
The German Book Market

Structure

Publishers by genre

When we discuss the German book market, we have to consider that we are not talking about a homogeneous market. When targeting sales, we have to differentiate first between fiction and non-fiction and also between professional and scientific books. It can best be explained with the following figure:

Figure 1: The German book market segments



As inconsistent language is used to describe German book genres, for the purpose of this report, we will use the following German terms:

- General interest is subdivided into *Belletristik* (fiction) and *Sachbuch* (non-fiction).
- Special interest is non-fiction with very specialized subjects (e.g., hobbies, travel guides, cookbooks, children's books, etc.).
- Specialist books (*Fachbuch*) are considered both specialist books for a wide variety of purposes (mostly business) and also scientific books for purposes of scientific research (including university presses).
- Scientific books for educational purposes are included in the segment of educational books and combined with school books.