Book selling and e-books in Sweden

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Research paper

Abstract

This paper addresses the issue of the understanding of the book-selling situation as Swedish booksellers see it. It pursues the answers to the following questions:

1. What are the perceptions of Swedish booksellers of the impact of e-books on their business?
2. What drivers are important for Swedish booksellers for adopting and developing e-book sales through their own sales channels?
3. What do they perceive as barriers to e-book selling through their own channels?

The authors have employed the analysis of the secondary statistical data and a survey of Swedish booksellers to answer their questions.

The results of the investigation have shown that the Swedish booksellers do not feel their bookshops, or business in general, are threatened by e-books. The opinions on e-books do not differ between the few selling e-books and others who do not offer this product. The reasons for selling e-books are well-functioning routines and personal interest in the product. The reasons for not selling the books are the lack of demand and technical resources as well as contractual agreements with e-book publishers or vendors. So, technical resources for e-book sales, routines, and contracts with publishers are the main premises for this activity.

The biggest barriers to e-book sales are: a) the price as one can see not only in the answers of the booksellers, but also in the drop of sales obviously related to the rise of prices during 2014; b) lack of demand from customers who do not enquire about e-books in bookshops. This leads to the belief that e-books will be sold mostly online either directly from publishers and authors or through online booksellers. However, an equal number of booksellers believe that physical bookshops will be selling printed books and e-books in the future. The future of

e-books seems to be quite secure and non-threatening to printed books from the point of view of booksellers. The growth of e-book sales is quite slow and the respondents believe that it will increase at a moderate rate.

KEYWORDS: e-books, bookselling, bookshops, survey, Sweden.

Introduction

A four-year project looking into the situation as regards e-book production, distribution and reading in Sweden as a case of a small publishing market limited by the number of speakers is in its third year now. The researchers have explored the attitudes of publishers and the situation in public and academic library sectors and this has helped to understand the roots of some processes related to the acceptance of e-books by Swedish society.

The picture would be not full without an exploration of the commercial channels of e-book distribution and the next step that the team of researchers has taken is looking at the opinions of the booksellers of Swedish books about the e-book situation. Their perceptions and attitudes are important starting points in further deeper exploration of the e-book commercial distribution practices in Sweden.

In this short paper we would like to look into the Swedish booksellers' understanding of the situation as regards bookselling. We would like to answer the following questions:

1. What are the perceptions of Swedish booksellers of the impact of e-books on their business?
2. What drivers are important for Swedish booksellers for adopting and developing e-book sales through their own sales channels?
3. What do they perceive as barriers to e-book selling through their own channels?

Background

Bookshops were the main participants in the book sector as a whole and in the book market in particular over the ages. Actually, for a long time book trade was central to book-related activities and often combined publishing, transporting, printing, collating and/or book binding businesses with actual bookselling. Wholesalers, retailers and other book distributors were mainly a stable element of the book circuit from the 16th century to the start of the 21st century (Murray and Squires 2013). But the appearance of e-books has thrown the whole book circuit into turmoil, in which the place of fine traditional bookstores and other booksellers is not self-evident. Other actors are pushing each other to take the place that previously belonged to the established book trade participants, especially in that part of the circuit that was formerly occupied by bookselling organisations. Of course, these processes of change in bookselling cannot be attributed only to the e-book. The deregulation of book market in some countries, online book sales, and changes in reading habits have affected bookselling all over the world to the effect that traditional bookshops experienced an increased pressure in purely economic terms. Table 1 shows the diminishing market share of bookshop sales in comparison with internet-only sellers in the UK.

Table 1: UK book sales: source of purchase 2009-2013 (source: BA Reports Library 2014).

UK market share (volume) %	**2009**	**2010**	**2011**	**2012**	**2013**
Internet-only retailer	21	25	30	44	48
Direct seller	8	6	6	4	3
Other non-specialist shop	11	11	11	7	6
Supermarket	14	14	12	12	10
Bookshop	46	43	40	33	31

The diminishing numbers of bookshops in the UK and the discussion of closing bookstores in other countries, such as Borders in the USA, are often related to the late adoption of the internet sales or e-books. These are two main reasons out of five given by Sunburn (2011) for the closure of Borders. More detailed information on the changes in bookselling in the English speaking world can be found in the BA market intelligence reports (The Booksellers Association 2014).

One can also observe a similar trend of the diminishing number of bookstores in Denmark, Finland and Iceland (see Fig. 1), while the graph provides a more stable picture in Norway and shows no changes in the number of bookselling points in Sweden. The same number of 400 bookstores is named in the most recent edition of Swedish bookselling statistics of 2013. The authors note that this number remains stable over quite a few years and if some of the stores are forced to close, they are replaced by new ones (Nordic Book Statistics Report 2013, 19).

One has to take into account that in

> the deregulated markets in Sweden and Finland, there is no generally accepted definition of a bookstore. Finland and Sweden refer to stores with a wide selection of books. Sweden has 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 the following chart, the figures for Denmark show stores with more than 200 titles in stock (Nordic Book Statistics Report 2012, 12).

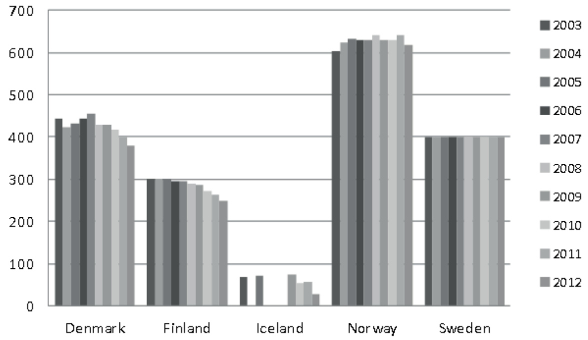

Fig. 1: Number of bookselling points in Scandinavian countries in 2003-2012 (Nordic Book Statistics Report 2012, 12).

Swedish bookshops have demonstrated stable resilience to the pressures of the recent past. The present situation is the consequence of long bookselling tradition. For many years booksellers were mainly economically dependent on Swedish Publishers Association, which had an agreement with Swedish Booksellers Association. The publishers would provide books for selling on commission for fixed prices in any bookselling point and would not get any payment for the copies returned to the publisher. In return, booksellers could be quite sure that they would not face hard competition in the area and would get all new titles without any problems. In parallel, there were also so-called free booksellers who operated in the market of mass sold paperbacks and did not enjoy the same privileges, but did not have any obligations towards publishers (e.g. Pressbyrån) (Yrlid 1975).

In 1954, the state abandoned the system of fixed prices, but the book market got an exemption from it. However, 1970 is a very important year in which the deregulation of the book market happened in Sweden. The control over the establishment of booksellers, the system of commission, and fixed prices disappeared. Sweden was one of the first countries in Europe to implement free pricing on books (Steiner 2009, 117). The 1970 deregulation was a great threat to the old, family-owned bookshops. But book clubs and bookstore chains have had a stronger impact on the traditional distributors than the appearance of the e-books at present.

And at present, it seems that most of the ongoing change is happening because of the development of internet book-sales with Amazon having a large part of the market, and the emergence of new services, such as subscription to e-books similar to Scribd, Readly of Mofibo. Thus, it seemed interesting to find out what the attitudes and worries of booksellers in a small book market of Sweden are.

According to the Faktabank maintained by the Swedish Publishers Association, the value of the whole Swedish book market was 6,600 MSEK. The e-book market share is very small and represents approximately 1% of the market (Bohlund 2014).

Biggest publishing groups, such as Bonnierförlag and Norstedts dominate e-book publishing. Amazon has not yet arrived to Sweden, but in April of 2014 it signed a deal with the book database service Bokrondellen, which provides Amazon with full access to metadata on Swedish book titles for all Amazon's websites (Nordström 2014). This allows Amazon to sell Swedish books anywhere in the world. Swedish book market actors are expressing different levels of anxiety and expectations with regard to this fact, but most express opinion that Swedish e-book market should start growing more rapidly (Nordström 2014).

Research approach and methods

To understand the booksellers' perception of the e-book and its impact on the book market we have used a theoretical framework for the research based on Winston's (1998) model of the technical innovation process. This model has been used in the other parts of the project and is described elsewhere (see Maceviciute *et al.* 2014). Here we introduce very shortly its aspects that are important for answering our research question. The diffusion of the invention depends upon the 'law' of the 'suppression of radical potential', the source of which may vary according to the nature of the invention, but the result of which is a failure to fully develop the possibilities of the invention. On the other hand, the 'supervening social necessity' helps to make the prototypes into marketable innovations that are diffused in different social contexts. Both the 'suppression of radical potential' and the 'supervening social necessity' are those forces in society or in the market that either prevent the innovation from realising its full potential or drive its acceptance and wide use.

Two main methods were used in answering the research questions. We have examined the statistical data collected by the Swedish Publishers Association and Swedish Booksellers Association for the newest available data on e-book production and sales. We also tried to find any evidence of impact of the e-book on the bookstores and other booksellers in this data.

The main method, however, was a survey of booksellers that we conducted in spring of 2014.

We have anticipated that there might be differences between the situation and attitudes of the bookstores that sell e-books already and those that have not yet started selling them. Therefore, we have created a questionnaire directed at those two groups.

On the whole the questionnaire covered the following topics: the situation of e-book sales through bookstores, e-book customers, the impact of e-books on book sales situation, and the role of bookstores in the future. We have tested the questionnaire on the staff of one of the branches of the bookstore Akademibokhandel in a medium sized city and made some corrections to the formulation of some questions. The questionnaire was uploaded to the SurveyMonkey service site.

We have found 440 physical bookstores registered in Sweden. 334 of them belong to the Swedish Booksellers Association. Besides physical bookstores, 50 online bookstores operate in Sweden. There are also 50 second-hand bookstores including antiquarian and children's bookstores. The booksellers were grouped according to their size and nature (big chains, big stores, small independent bookstores, internet booksellers), and location to cover all 22 counties in Sweden and represent the biggest publishing centres Malmö, Göteborg and Stockholm. The sample of the booksellers was built up following the rules of stratified random sampling.

In mid-March 2014, we conducted a small pilot survey with 25 bookstores and received nine responses. The pilot has shown that the formulations in the questionnaire were understood and there were no further changes made to the questions. In May we sent the link to the survey to 132 other booksellers. Four of them could not be reached on the given address or found in any other way. Thus we have addressed 128 booksellers. We have received a total of 48 responses reaching 30% response rate. Most of the answers came from interested booksellers from the largest cities, but some were also from smaller towns. Most respondents represent physical bookshops, but we got some online booksellers responding as well. The response rate is quite low; nevertheless, we consider the results of the survey to be interesting enough to present to your attention. We cannot make wide and sweeping generalization from those, but they are indicative of the processes related to e-books adoption going on in the Swedish bookselling.

Results

Secondary data analysis

On September 24, 2014 Swedish Publishers Association (SvenskaFörläggare-föreningen) and Swedish Booksellers Association (SvenskaBokhandlare-föreningen) presented a statistical report on bookselling, which is more inclusive and detailed than anything that had been presented earlier. The data was collected with the help of Rondellen – a company that works in the area of collecting and transferring information on books from most Swedish publishers and book importers. Sales data from POS (point of sales) or equivalent systems used by respondents were delivered to Rondellen, thus ensuring that the data reflects actual sales and registers these as primary facts. This data also became a foundation for a common annual report from both organisations (Wiklund 2015) that is also used in this part.

The resilience of the physical bookshops mentioned earlier has been confirmed by the newest statistics that shows their stable position in the period between January 1 and December 28, 2014, as compared to other distribution channels. Book sales in general supermarkets and book clubs diminished by 20.2% and internet bookselling by 1.4%, while physical bookshops demonstrated a modest growth of 1.8%. Even if the data is not enough to verify the trend for a longer period, this channel produced the best result in terms of book sales in 2014 (Wiklund 2015, 14).

The report shows that average sales of all books during 2013 dropped by 1.1% in comparison with 2012. Comparison between the periods of 2013. 01. 01 - 08. 31 and 2014. 01. 01 - 08. 31 shows that the sales have diminished further by 5.4%, while the fall in sold copies was 6.8%. The sales in 2013 diminished through all channels (physical bookshops, internet booksellers and other sellers). The sales in physical bookshops increased by 0.2% in 2014, but others decreased further. The overall average price of a book was higher in 2013 by 5.0% and increased further in 2014 by 1.5%.

With regard to the format, the sales of printed and digital audiobooks went down in 2013 by 15.4% and 10.5% respectively. The situation with e-books has shown the biggest changes (see Table 2).

Table 2. Relationship between e-book sales and prices (Source: SvenskaBokhandlareföreningen and SvenskaFörläggareföreningen 2014).

	2012	**2013**	**Change**
E-book sales (TSEK)	7764	11917	+53.5%
E-book item sales	90	201	+123.3%
E-book price (SEK)	86*	59*	-31.3%
	2013.01.01-09.31	**2014.01.01-09.31**	**Change**
E-book sales (TSEK)	7963	6437	-19.2%
E-book item sales	150	98	-34.6%
E-book price (SEK)	53*	66*	+23.6%

Note: prices do not include VAT, which is 25% for e-books (6% for printed books).

The increase or decrease of sales is directly related to the e-book price changes. In itself there is nothing new in this fact. The book sales period during which the prices of books go down has shown better results in all categories (e-books sales over this period increased by 163% in 2013, but fell down in 2014 by 12.2%). It is also necessary to have in mind that these dramatic changes in e-book sales and prices do not have any major impact on the book market as a whole, because e-books have so far occupied only a very small part of it. This trend was confirmed by the annual report with some changes in the percentage (Wiklund 2015).

Survey results

Roughly at the same time the E-book Research Group also conducted a survey of a slightly different nature. We have surveyed the attitudes and situation of Swedish booksellers in relation to e-books in the market.

E-book sellers. Out of 48 booksellers answering our questionnaire only six were selling e-books at the time of survey and one of them was also selling e-readers. One of these six was Adlibris. It is one of the biggest online booksellers in Sweden offering over 11 mln. titles (5,000 of them e-books) (http://www.adlibris.com). It launched its own e-reader Letto in 2010. All six responding booksellers have well-functioning routines and are interested in selling e-books in the future. These are the main reasons for selling e-books. One thinks that they "must sell them". No one mentioned that their sales were driven by customer demand (though one respondent mentioned that they wanted to meet the demand in the comments) or contracts with e-book providers. Two of them get e-books for sale from Elib (Swedish online bookstore), one from Kobo (Toronto-based global provider of e-readers and e-books), one sells books provided by the chain, one buys them through the buying consortium Ugglan (uniting 57 bookshops) and one does not know where their e-books come from. Three booksellers market e-books on their websites, one uses posters in the bookshops and one used advertising. Two have answered that they have never advertised e-books in any way. Only one bookseller was aware of customers asking for e-books. In this particular bookshop mostly young, middle-aged and older women who visit the bookshop only occasionally seek e-books. Three respondents have noticed that sales in the bookstore have increased since they have started selling e-books; one thinks that they have diminished, and one has not noticed any changes. It seems that these perceptions also influence the opinion about the impact of e-books on the future sales of e-books (three think it will further increase, one – that it will not change, and one that it will further diminish). According to these booksellers, e-books could start competing with paper books if their price goes down (2), or if they start offering new features not available in paper books, such as extra material or new dimensions (3). Three respondents suggested that e-book sales would increase within 2-5 years; two of them do not expect any changes in comparison with the present situation.

Respondents not selling e-books. Forty-two booksellers answering the questionnaire belong to this group. Only six of them have reported that their customers look for e-books in the bookstore, the remaining 35 (85%) state that their customers are not asking for e-books. Almost half of the respondents also indicated this as the main reason for not selling e-books in bookshops.

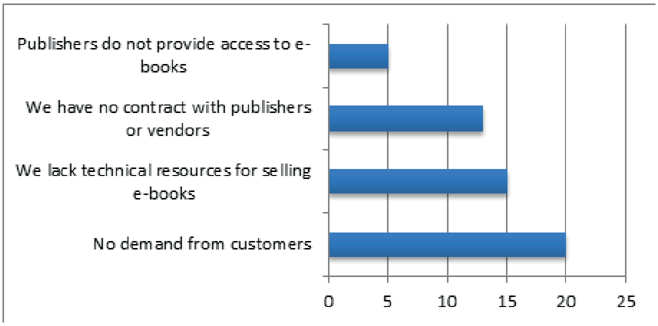

Fig. 2: What prevents you from selling e-books? (n=42)

Another serious reason is lack of technical resources and contacts with publishers or vendors. Three of the respondents have noted that they were selling e-books earlier, but the vendors who they had a contract with were closed down (Fig. 2).

According to the responding booksellers, e-books will be able to compete with printed books when they stop resembling them, by adding new features (such as hyperlinks to other texts, images and moving images, sounds, etc.) and materials, which is closely related to the quality of e-readers and e-books themselves. The price is the second most important factor to them that might help to attract readers and customers in general to this format (Fig. 3).

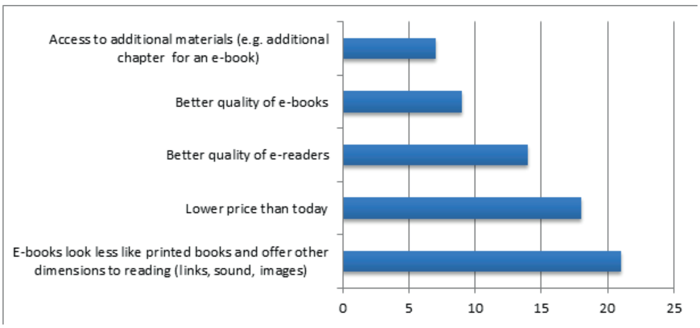

Fig. 3: What is needed for e-books to compete with printed books? (n=42)

The arrival of Amazon on the Swedish book market is regarded with caution by our respondents, but it is a positive factor with regard to the sales of e-books (17 respondents believe that these will increase). On the whole, our respondents see Amazon as a negative factor diminishing the value of Swedish book market and causing problems for traditional bookshops. Very few of them believed that Amazon might have an impact on the sales of Swedish titles, while almost no one regarded it as a positive actor helping to increase reading in general (Fig. 4).

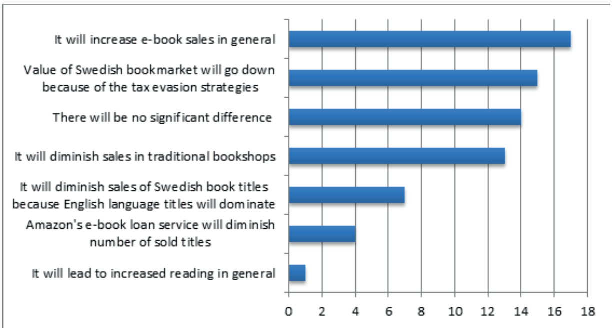

Fig. 4: What will be the consequences of the arrival of Amazon to the Swedish book market? (n=42)

E-books themselves are not regarded as an important factor for book sales in Swedish bookshops by our participants. Only one respondent thinks that the overall sales have increased as a result of e-book development, while 32 (or 84%) think that it remained the same. Five booksellers noted diminished sales because of e-books (Fig. 5).

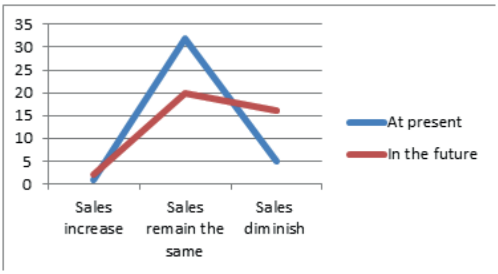

Fig. 5: Impact of e-books on sales ("At present" n=43, "In the future" n=46)

The future impact of e-books is judged roughly on the same lines, though more respondents believe that the book sales in bookshops will decrease when e-books become more popular (Fig. 5).

This opinion is slightly at odds with the answer to the question of the role of bookshops in the future, as only 12 respondents believe that their role will diminish when e-book sales increase. Twenty-two respondents think that bookshops will be selling both printed books and e-books, but there is an equivalent number of respondents who believe that e-books will gradually move to online sales directly from publishers and authors (14) or through online booksellers (10) (Fig. 6).

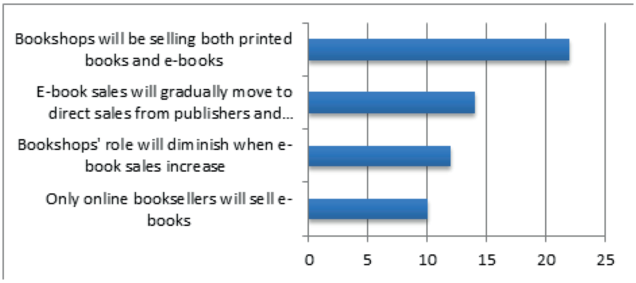

Fig. 6: Role of bookshops in the future (n=42)

The answers to these two questions show that there is no firm opinion about future development of bookshops in relation to e-books and their arrival.

On the other hand, the future of e-books seems to be rather clear. Though six respondents do not believe in the growth of e-book sales ever, five admit that they cannot predict the future, thirty do not hesitate to claim that e-book market will be growing.

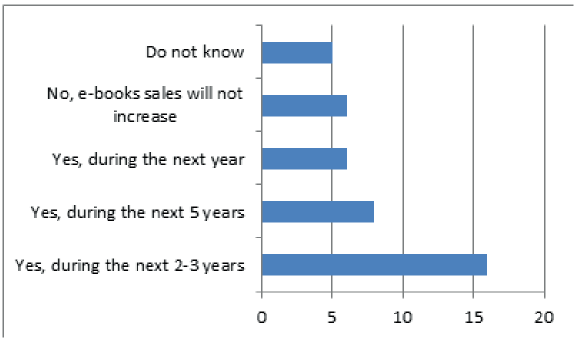

Fig. 7: Do you think that e-book sales will increase in general? (n=47)

This group disagrees only about the time when e-book sales will start increasing in general. The minority of six thinks that this will happen next year, a group of eight believes that the increase will become more marked within the next five years, and the majority of 16 believe that we will see the sales of e-books growing within 2-3 years (Fig. 7).

However, there is a strong degree of confidence in the future of the bookshops. Several respondents have emphasized in the comments that they

> … do not believe that e-books will outperform printed books. In the USA one can see already now that the part of sold e-books has flattened and covers 1/5 of the market. There are too many catastrophe scenarios and fears in this branch.

Some see greater threats in the situation that is emerging from the turbulence of the book market:

> The dominance of several media companies in the market is threatening the diversity of the cultural area on the whole. Problem is that book producers' engagement in book sales will grow leading todistortions of competitionin the retail.

One of the respondents has also introduced the consumers' perspective:

> This debate has a tendency to suffer from a traditional branch focus. As a bookseller, naturally, I am worried about the developments that threaten to diminish my income, but as a consumer and literature lover I think that development of greater access and new formats is fantastic. One should not allow people from the branch with own interests to be heard louder than consumers. The written word will survive perfectly happily without today's structures of publishing and bookselling.

Conclusions

Some of our respondents think that the questionnaire is focusing on the e-books too much and the authors of the questionnaire believe that bookshops cannot survive without e-books. This is not the case as far as our beliefs are concerned, but their understanding of the focus of the questionnaire was entirely correct. We are very grateful to all the respondents who found time to participate in the survey. Without them we would not be able to arrive at the simple conclusions presented here.

1. So far, the Swedish booksellers have not felt that physical bookshops or their business in general are threatened by e-books. Most of them find that there is no need to engage in the troublesome business of selling e-books. There are several who have stopped selling e-books, but none who plan to sell them in the future. Only one plans to add e-readers to the e-books that are already sold in the bookshop. The opinions on e-books do not differ between the few selling e-books and others who do not offer this product. The activities of physical bookshop, among other institutions, are also supported by the Government policy as important actors for reading promotion (Regeringens proposition 2014, 52). This may also add to the sense of security among Swedish booksellers.

2. The reasons for selling e-books are well-functioning routines and personal interest in the product. The reasons for not selling the books are the lack of demand and technical resources as well as contractual agreements with e-book publishers or vendors. The bookshops that have stopped e-book sales did so, because their vendors have closed down. Thus, one can suggest that at present, only booksellers with interest in e-books are selling them in bookshops or online.

Technical resources for e-book sales, routines, and contracts with publishers are the main premises for this activity.

3. The biggest barriers to e-book sales are: a) the price as one can see not only in the answers of the booksellers, but also in the drop of sales obviously related to the rise of prices during 2014; b) lack of demand from customers who do not enquire about e-books in bookshops. This leads to the belief that e-books will be sold mostly online either directly from publishers and authors or through online booksellers. However, an equal number of booksellers believe that physical bookshops will be selling printed books and e-books in the future. Thus, the future of e-books seems to be quite secure and non-threatening to printed books. The growth of e-book sales is regarded as being quite slow and having a moderate growth rate.

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Sažetak

Knjižarstvo i e-knjige u Švedskoj

U radu se analiziraju stavovi švedskih knjižara o sljedećim pitanjima: 1) poimanju utjecaja e-knjiga na knjižarstvo, 2) čimbenicima koji su im važni za usvajanje i razvoj prodaje e-knjiga kroz vlastite prodajne kanale i 3) preprekama prodaji e-knjiga kroz vlastite prodajne kanale.

Da bi odgovorili na navedena pitanja, autori rada primijenili su metode analize sekundarnih statističkih podataka i anketiranja švedskih knjižara. Rezultati istraživanja pokazali su da švedski knjižari ne smatraju kako su njihove knjižare ili posao općenito ugrožene e-knjigama. Mišljenja o e-knjigama ne razlikuju se između nekolicine knjižara koji prodaju e-knjige i onih koji ih ne nude. Razlozi za prodaju e-knjiga su dobro uhodani postupci i osobni interes prema proizvodu. Razlozi onih koji ne prodaju e-knjige su nedostatak zahtjeva za takvim proizvodom i tehničkih resursa, kao i ugovori s nakladnicima ili distributerima e-knjiga. Dakle, tehnički resursi za prodaju e-knjiga, uhodani postupci i ugovori s nakladnicima glavni su preduvjeti za njihovu prodaju. Najveće prepreke prodaji e-knjiga su: a) cijena, što je vidljivo ne samo iz odgovora knjižara, nego i iz pada prodaje očigledno povezanog s rastom cijena tijekom 2014. i b) nedostatak potražnje jer kupci u knjižarama ne traže e-knjige. Iz navedenog se može zaključiti da će se e-knjige prodavati uglavnom *online* izravno od nakladnika ili autora ili putem *online* knjižara. Međutim, jednaki broj knjižara vjeruje da će fizičke knjižare u budućnosti prodavati i tiskane i e-knjige. Iz perspektive knjižara, budućnost e-knjiga se čini prilično sigurna i ne predstavlja prijetnju tiskanim knjigama. Rast prodaje e-knjiga je spor, a ispitanici vjeruju kako će rasti umjerenim tempom.

KLJUČNE RIJEČI: e-knjige, knjižarstvo, knjižare, anketa, Švedska.