

Country report

The Netherlands

PART I: BASIC FACTS

National statistics

- Number of inhabitants: 16.424.931 (April 28th 2008)
- Amount of leisure time spent on reading:
- Illiteracy: About 250.000 persons
- Functional illiteracy: 1,5 million persons (1 million non native speakers, 500.000 native speakers)

Book Trade statistics

- **Number of bookshop outlets, member of the Royal NBb**

2006	1.429
2007	1.481

- **Number of bookshops**

	2006
Number of bookshop outlets, members of the NBb	1.429

- **Bookshop chains in 2007**

100 or more outlets:	50 to 100 outlets:	Less then 50 outlets:
Bruna The Read Shop	Ako Boekenvoordeel (remainders) Vroom en Dreesmann	BGN/Selexyz Clubcenter De Bijenkorf Boekhandel De Slegte Plantage Boekhandels

- **Collective purchasing 2007**

Collective purchasing
Boekenpartners Libris Blz

- **Number of books available through Central Boekhuis**

					<i>1st edition</i>	<i>2nd edition and more</i>
Kind of book	2004	2005	2006	2007	2007	2007
General books	10.633	11.586	12.488	13.019	11.499	1.520
Educational books	2.546	2.162	2.274	2.232	1.589	643

Academic books	2.056	2.331	2.096	2.010	1.761	249
Other	1.566	1.420	2.541	1.651	1.531	120
Total	16.801	17.499	19.399	18.912	16.380	2.532

NBb-members questionnaire 2007
1159 NBb-members with 1481 outlets

	2006	2007	Difference	Mutation
Total (incl. other products)	1224	1278	54	4,4%
Turnover in books in the Netherlands	929	975	46	5,0%
Turnover in non-books in the Netherlands	295	303	8	2,7%
Turnover scientific books in the Netherlands (incl. journals)	149,5	155	5	3,7%
Turnover educational books (incl. rental and second hand)	307	310	3	1,0%
Turnover general books	472,5	510	37,5	7,9%
Turnover children's books	55,2	71,4	16,2	29,3%
Turnover fiction	213,1	213,7	0,6	0,2%
Turnover non-fiction	204,2	224,9	20,7	10,1%

* Yearly turnover in millions of euro's excl. VAT

Divers

- Amount spent on books per head annually: €99,-
- Average price of a book: €13,85
- Number of public libraries: 215 library organisations in August 2007, 1000 outlets
- Number of books borrowed from libraries: 122.756.000
- Is there system of price regulation or any other system of regulation of the book market?: Yes, the Fixed Book Price Act, 01-01-2005
- Number of available titles published: 18.912
- Imported books: 6 million
- Average wage of bookshop employees: around 1.500 euro's gross
- The percentage of translated titles: around 75%, there is no evolution
- In which category was there a noticeable difference in sales and why did it take place?: considerable increased sales (+29%) of children books especially due to the English and Dutch version of Harry Potter

Statistics

- **How have your statistics been collected?** These statistics have been gathered by means of written surveys, consumer research through internet and over the telephone, and processed data provided by EPOS systems of booksellers. The most common research is through the annual net sale questionnaires (omzetenquête) and from the GfK-book-control. Other statistics come from CBS (General Statistics Organisation).
- **Number of outlets represented in these figures:** 1.481
- **What type of booksellers are included in these figures (i.e. general, academic, department store,)?:** All kinds
- **Are there any known limitations to your statistics?**

PART II: THE DAY TO DAY WORK AND SERVICES PROVIDED BY THE BOOKSELLERS ASSOCIATION

Association structure

Members:

- **Numbers of bookshops represented by the NBb:** 1.159 which represent 1.481 outlets.
- **Are the members independent bookshops only?** No, besides independent stores, NBb members include chains and department stores. 13% of all members is part of a chain. 75% is a member of a collective purchasing or a franchise organisation. 12% is completely independent.
- **Do you have bookshop chains as members?** Yes, all chains are represented by the Royal Dutch Booksellers Association besides remainder chains.
- **Do you have other retailing chains as members?** Yes, large department stores such as Bijenkorf and V&D (Vendex).
- **Are supermarkets allowed to be members of the association?** Yes, if they meet the criteria. They can become a Basic member (the need to sell books) or a Plus member (they need to offer an ordering service, they need to have a minimum of 1.000 titles in stock and at least one of the employees needs to have the right credentials in the form of sufficient education or experience).
- Number of FTE at the Royal Dutch Booksellers Association/Dutch Book Token/Book & Company office: 12,05
- Number of board members: 8 booksellers and NBb director

Income/commercial activities

- **Where does the association get their income from?** From the booksellers' contribution fees. There are no state subsidies.
- **Do you carry out any commercial activities?** Two separate companies of which NBb is owner of the shares carry out commercial activities: The Nederlandse Boekenbon BV (Dutch Book Token), and Boek & Bedrijf (Book & Company) which concentrates on individual consultancy for NBb members.
- **Do you make members pay for certain services?** Yes, members pay a reduced fee if they want to participate in one of these organisation's activities or require their services.
- **Do you participate in the distribution of books?** NBb is a 50% shareholder of Centraal Boekhuis ((CB) Central Bookhouse, the largest book distributor in the Netherlands). The other 50% belong to the Publishers Association.
- **Does your association act as a clearing house (for example for book tokens)?** Not the NBb but the Dutch Book token acts as a clearing house for book tokens.

Services provided by the association

- **Book Token 2007:**
The Book Token is the eldest and most respected gift voucher. The Dutch Book Token is known to 98% of the Dutch population, thus surpassing all other gift vouchers. According to estimates, about 6% of the books is paid with a Book

Token. In 2007 2.5 million Book Tokens were used as payment. Bookshops reached a Book Token turnover of roughly €34 million.

- **Do you provide bookstores with wrapping material?** No, the Dutch Book Token only provides sleeves for the Book Token.
- **Do you help your members obtaining bibliographical tools?** See below: bibliographical information.

Training

Training courses for the booksellers (and publishers) are run by the training centre: *VOB/Boekacademie*. For (trainee) booksellers, the VOB runs the Basic Course for Booksellers. This part-time (evening) course covers basic commercial skills and know-how specifically related to the book trade in four different modules. Successful candidates receive certificates for each of the four modules. The course is fully financed by the participants and is regularly updated by the VOB. The VOB also provides additional training in various areas such as management and children's books. NBb-members get a discount.

The NBb offers two courses: The Online Introductie Boekhandel (Online Introduction to Bookselling) and computerrijbewijzen (a set of computer courses tailored to bookselling) The Online Introductie Boekhandel provides a short introduction to book selling. The Computerrijbewijzen teaches computer skills that are needed for the bookshop in particular.

- **How is it organised?** (written or evening course) The *Online Introductie Boekhandel* and the *Computerrijbewijzen* are software applications which can be accessed through the internet.
- **Do you release a diploma?** The NBb issues a certificate for each of the three courses.
- **How is it financed and updated?** The courses have been funded with European subsidy (Equal, 40%). The NBb Office takes care of regular updates.
- **What is the response rate?** There are no results available yet.

Collective marketing:

Do you take part in a collective promotion of bookshops or of books and do the publishers participate? Publishers and booksellers have set up the foundation (Collective Propaganda of the Dutch book - CPNB) in order to co-ordinate the development and execution of their joint activities aimed at the promotion of general books. The librarians joined the CPNB in 2001.

How is it organised? The main tasks of the CPNB are the organisation of the Boekenweek (Book Week); the Kinderboekenweek (Children's Book Week) and the Maand van het Spannende boek (Thriller's Month). Book Week is the CPNB's most substantial activity with a venerable past. Lasting for about ten days in March, Book Week has a different theme each year. In 2008 the theme was Old Age. Other themes have been Satire, Music, France, Death and different Cultures. Customers who purchase Dutch literary books during Book Week, with a total amount of €11,50 or more receive a novel written especially for Book Week free of charge. This year the CPNB made a total number of 900.000 printed copies of this Book Week Gift. The CPNB also issues special books for Children's Book Week and Thriller's Month. These and other activities are financed through an extra annual contribution by booksellers, librarians and publishers, which is collected by the trade associations.

Furthermore the CPNB has sponsors such as the Nederlandse Spoorwegen (Dutch Railways). Additional information can be found on the website, www.cpnb.nl.

What is the financial contribution of booksellers, or of the Booksellers Association?

Booksellers's investments into CPNB activities (2007): €

Campaign	Number of copies	Amount in euros
Fixed contribution for the office and core activities		
Book Week Gift 2007		
Children's Book Week Gift		
Geschenk Maand van het Spannende Boek		
Totaal		

Bibliographical information:

For obtaining bibliographical information, booksellers mainly use the databases of the distributors Central Bookhouse and Scholtens. These databases contain most of the Dutch books in print and an additional selection of foreign titles. The databases are updated daily by means of the distributors' ordering software called CB-online and Libridata. An increasing number of booksellers are using *Boekbalie* as a supplementary tool. *Boekbalie* is a unique project, implemented by the NBB and the VOB (the Association of Public Libraries). *Boekbalie* provides a database that, so far, has been unmatched in quantity and quality, containing almost all titles published in the Netherlands since 1982. Moreover, *Boekbalie* offers additional information, such as pictures of book covers, key words and librarian definitions. Additional information can be found on www.boekbalie.nl.

For obtaining information on foreign titles, most booksellers use databases from foreign distributors. These databases can be accessed through the ordering software CB-online and Libridata. Some of the databases are owned by companies such as Gardner's, Bertrams and Baker & Taylor. The Dutch importer Van Ditmar, dealing mainly in English and American books, offers an additional up-to-date database with foreign titles. The most important databases that can be used by booksellers ordering foreign titles are based in Germany, France and the U.K. An example is Bookdata. The NBB does not provide its members with bibliographical information but will refer queries to third parties. The NBB is, however, endeavouring to realise a Dutch (and Flemish) title database of a high qualitative and quantitative nature.

Communication:

How do you organize the communication with the members by magazine, newsletter, working-groups, annual meetings, regional meetings, e-mail? All of the above plus our website www.boekbond.nl

Government relations:

The NBB has regular contact with a number of organisations such as political parties, members of the parliament, the organisation for small and medium-sized businesses (MBK Nederland), book trade and retail organisations and ministries. There is regular contact with

political organisations and members of parliament about the price regulation system and other subjects. The Dutch book trade closely collaborates with all of the book trade organisations.

PART III: DEVELOPMENTS IN THE COUNTRY IN THE LAST YEAR

2007 was a very exiting year for the Dutch Booksellers Association. The NBb existed a hundred years. During the whole year there were all kinds of activities to celebrate this anniversary. The central theme of the year was “efficiency of the bookshop”. There were several meetings on this subject to inform booksellers how to improve their efficiency and performance. Also the NBb organised a big congress on digitization. Joost Swarte, a very famous cartoon artist from the Netherlands, developed a special anniversary logo and several other objects, that were given as a present to the members of the NBb.

The biggest event of the year was the Booksellers Ball in Amsterdam on the 24th of September, the exact birth date of the NBb. The evening was filled with theatre, music and dancing. A very special moment was when the mayor of Amsterdam announced that the queen honoured the NBb with the predicate “Royal”.

In 2007 research bureau GfK did the first full year of research by order of Stichting Marktonderzoek Boekenvak (SMB, Organisation of Market research Book Trade). GfK follows every week the absolute sale in three different canals: bookstores, music stores and other (supermarkets, gas stations, department stores and drugstores. 73% of the total market is represented in this research. In January 2008 an extrapolated total turnover was calculated via cash register en internet sales of €608 million in the three canals in 2007. The Dutch book gained €568 million, the foreign general book €40 million. The members of the NBb were responsible for 85% of the turnover. In 2007 members of the NBb sold 7.9% more general books than in 2006.

In November 2007 the government decided that school books for secondary education should be free, starting from school year 2008-2009. The idea is that the schools will receive money from the government that they have to use to provide the students with free books. The government will pay €300 million every years, what comes down to €308 per student per year.