

Dr. Rüdiger Wischenbart



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How book translation markets work – and will transform, in the context of ‚Artificial Intelligence‘.

An overview with data, case studies and perspectives.

ICTE, Shenzhen, April 2024

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My questions

- The specifics of the markets for ‚books in translation‘;
 - Case studies of successfully translated authors
 - Case studies on exemplary European translation markets and trends
- Opportunities to support & extend translation markets with AI
 - AI in a publishing environment with multiple formats and channels
 - AI supported marketing
- Concerns and cultural resistance against AI
 - European regulation efforts
 - Rights abuse
 - Replacement of human work through AI usage
- Outlook

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Part 01

- **The specifics of the markets for ,books in translation‘;**
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The markets for **books in translation** have many **specifics!**

The translation markets for books are shaped by **'informal networks'**

While many translators are using AI supported tools in their work routines, there are also significant **concerns** with regard to copyright abuses and work loss for human translators

The general market environment of book publishing is in full transformation as new, 'non-traditional' publishing models have emerged, like

- Self publishing
- Reading in foreign languages (English)
- Multi-format publishing (audiobooks) and distribution (subscription, streaming)
- New animated story-telling, like Webtoons, Manhwa, or games etc.

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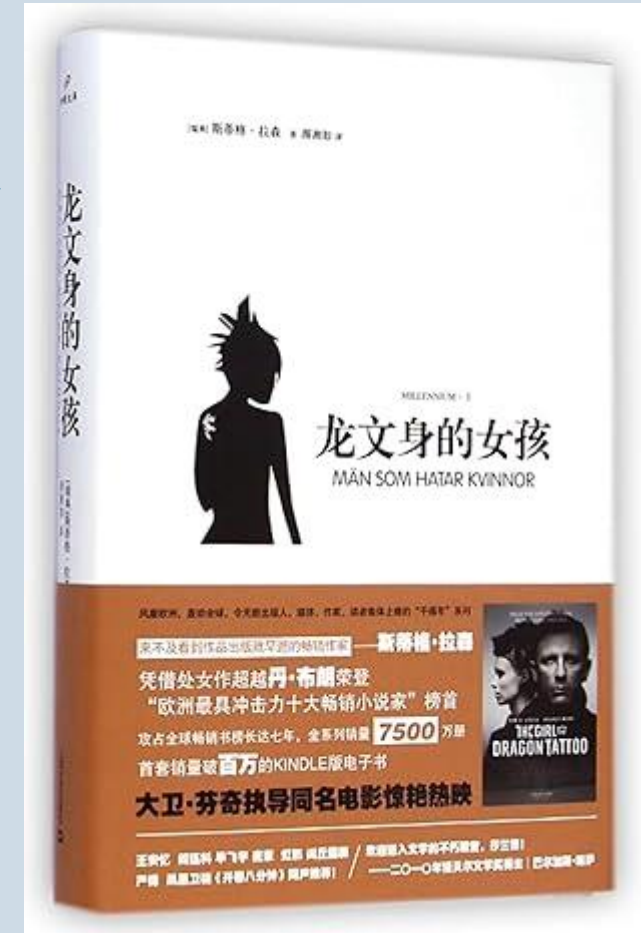
A global success!

How do translations spread?

An exemplary story of global sales

Stieg Larsson « **The Girl With The Dragon Tatoo** »

- Swedish original: 2005
- Chinese translation 2015
- Published in 50 countries
- By 2015, 80 million copies sold worldwide



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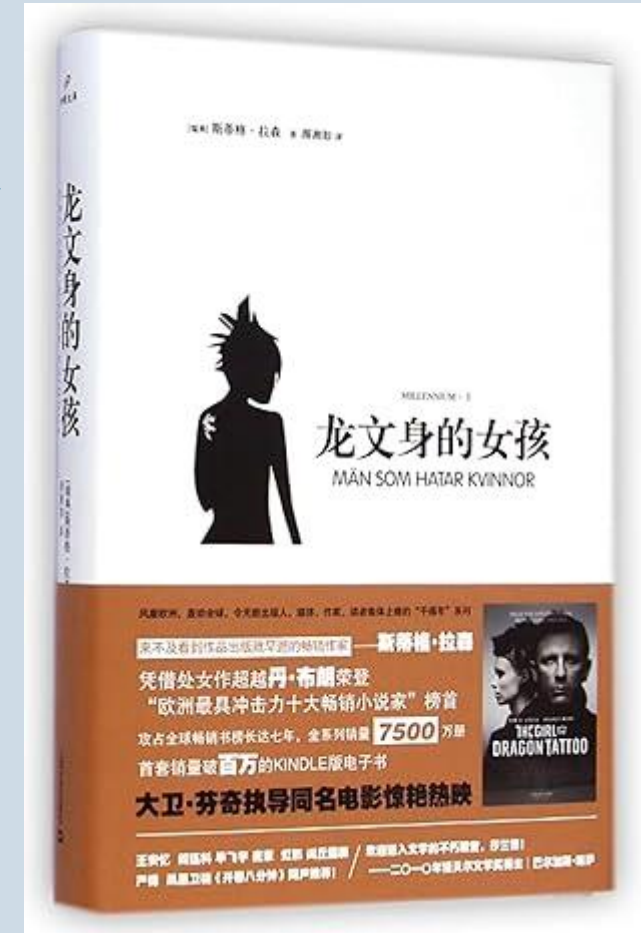


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A global success!

... and a success against all rules!

- Stieg Larsson wrote in **Swedish** – a language, spoken by less than 11 million people;
- A first translation into German failed;
- Outside of Sweden, the books became a first international success in France at independent publisher Actes Sud;
- The English translation was launched by a new small UK publisher freshly launched by Christopher MacLehose.



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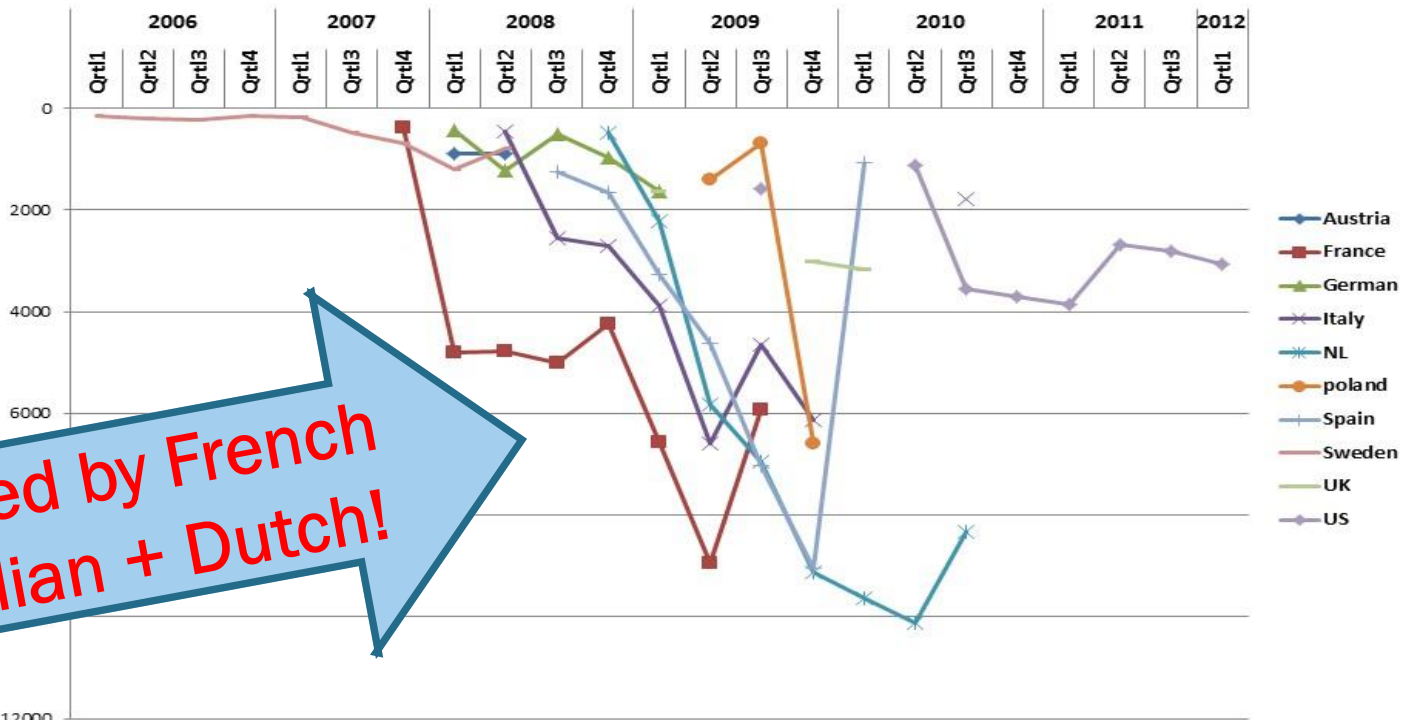


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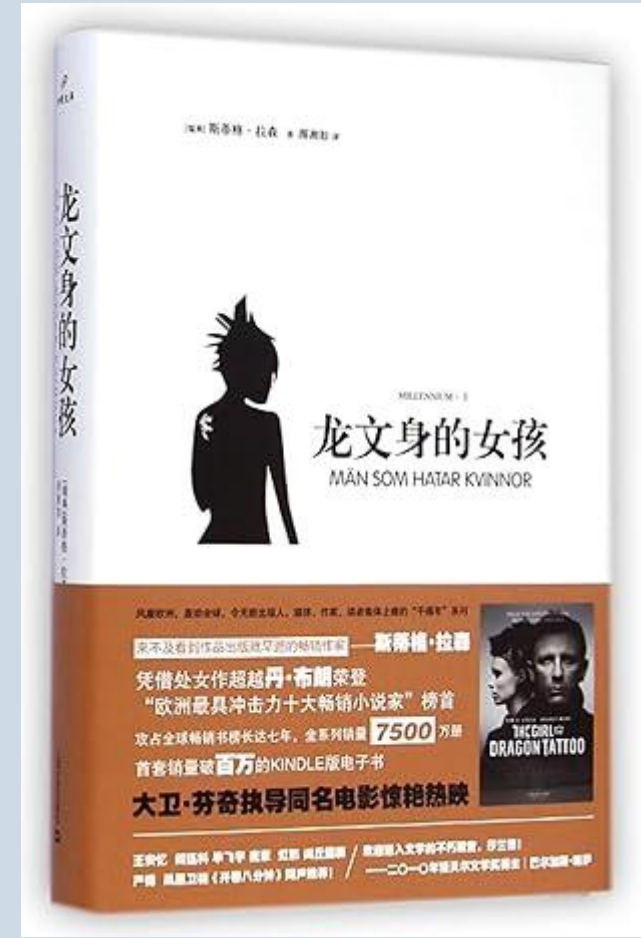
A global success!

... and a success against all rules!

Stieg Larsson: Millennium



Started by French + Italian + Dutch!

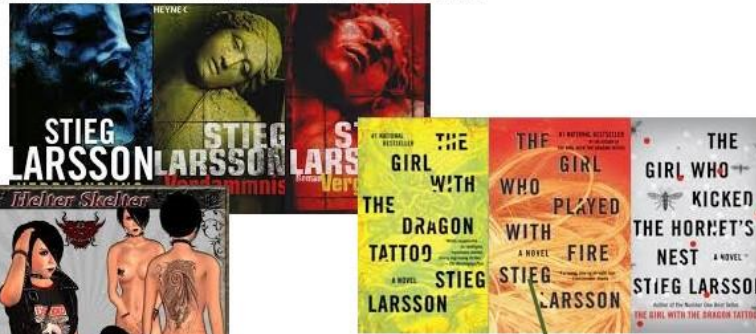


A global success!

... across all formats!



Stieg Larsson: Millennium



Sweden

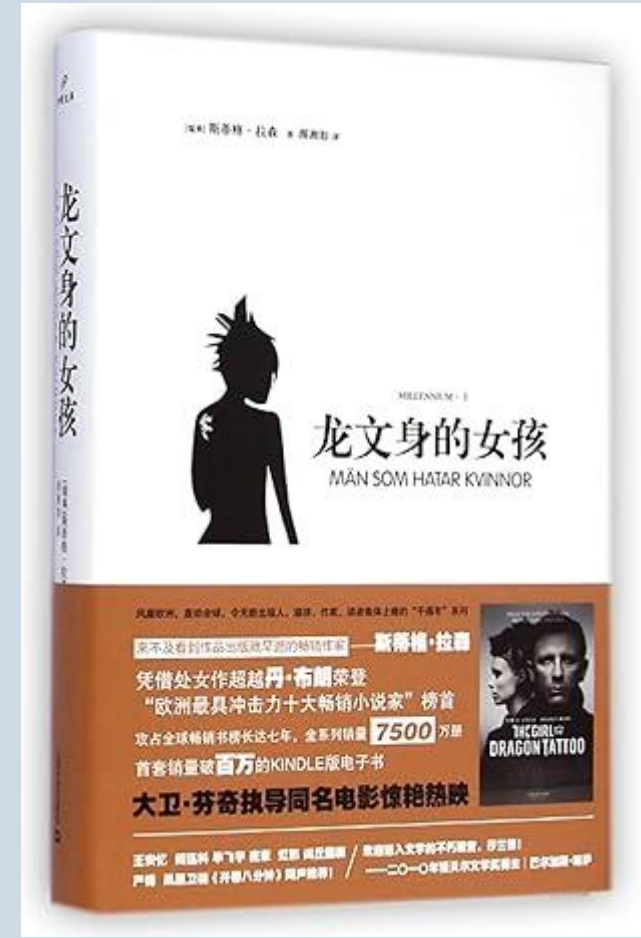


France

Germany



US



Liu Cixin (刘慈欣)

- A success story, created and supported by the international community of science fiction **fans!**
- His fans in New York knew about him as early as 2015, when only 1 book had been translated - **三体!**



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Liu Cixin (刘慈欣)

Comments by Richard Li Yun, literary agent for Liu Cixin in USA:

- By 2010, no translations from Chinese have been successful in the US;
- Very challenging to bring Chinese 'culture' to an American audience;
- Today, Liu Cixin is translated into 35 languages;
- Now a very successful series on Netflix!



<https://www.livreshebdo.fr/article/le-probleme-trois-corps-richard-li-yun-lagent-de-liu-cixin-raconte-la-genese-dun-succes> !

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How do translation markets **work**?

Original language > Transfer language > Many languages

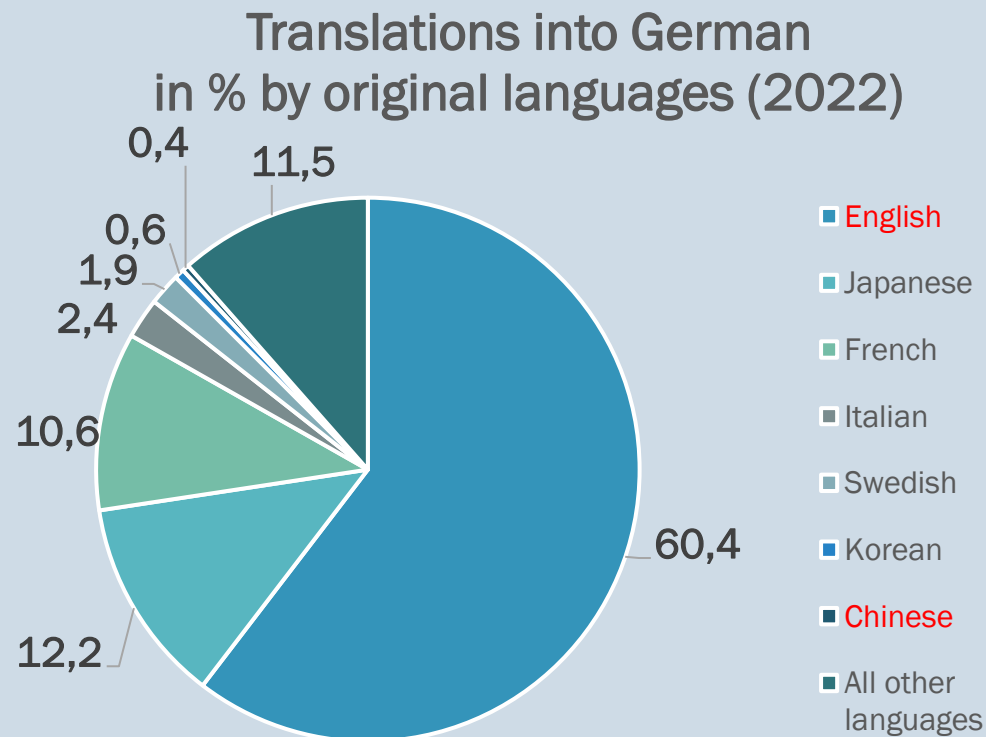
- **Original languages** can be a ‚small‘ language – provided its publishing sector is well connected internationally;
- **Transfer languages** are mostly
 - *German*
 - *French*
 - *(exceptionally) US English*
- Connecting a new translated author with an existing ‚**target audience**‘ in transfer markets;
- Well connected ‚**facilitators**‘ in target markets
 - *Literary agents*
 - *Specialized editors and publishers*
 - *Fans of a specific ‚genre‘.*

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Deep dive into important European markets for translated books: **Germany**



- Almost 2/3 of all translations are from English originals
- Translations from Chinese originals account for only 0.4 %
- Translation from Japanese became extremely popular in recent years >> „Manga“

Deep dive into important European markets for translated books: **Germany**

	2013	2022
New titles (total)	81,919	64,278
Translations into German (total)	10,731	8,703
Copyrights sold (total)	6,466	7,777
Copyrights sold to China	998	1,318

- 14.6 % of all new titles in Germany are translations
- China is largest market for German copyrights
- Particularly strong > Children and young adult titles
- But declining copyright sales into China in recent years

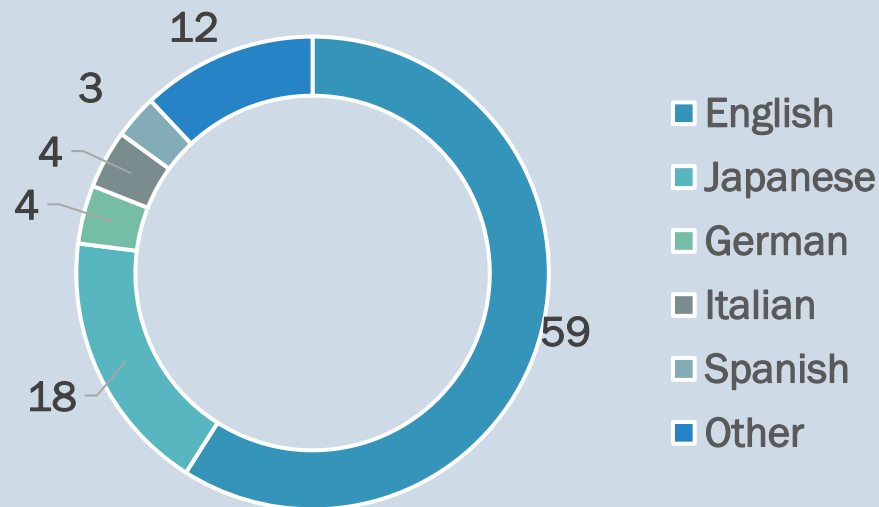
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Deep dive into important European markets for translated books: **France**

Translations into French,
in %, 2018 and 2022



- 59% of all translations in France are from English originals
- 18% are from Japanese originals > France has a huge tradition of comix in French, and a very enthusiastic readership of Manga

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Deep dive into important European markets for translated books: **France**

	2022
New titles (total)	38,743
Translations into French (total)	11,185
Share in % of comix copyrights sold	30%
Share in % of young adult copyrights sold	

- Overall declining production of new titles in France
- 15.3 % of all new titles in France are translations – declining slightly in recent years
- Most translated genres are literary novels and romance novels (28%), comix (incl. Manga, 26%) and young adult literature (12%)
- **China** is largest market for French copyrights with 1480 titles in 2022
- Particularly strong > Children and young adult titles followed by comix

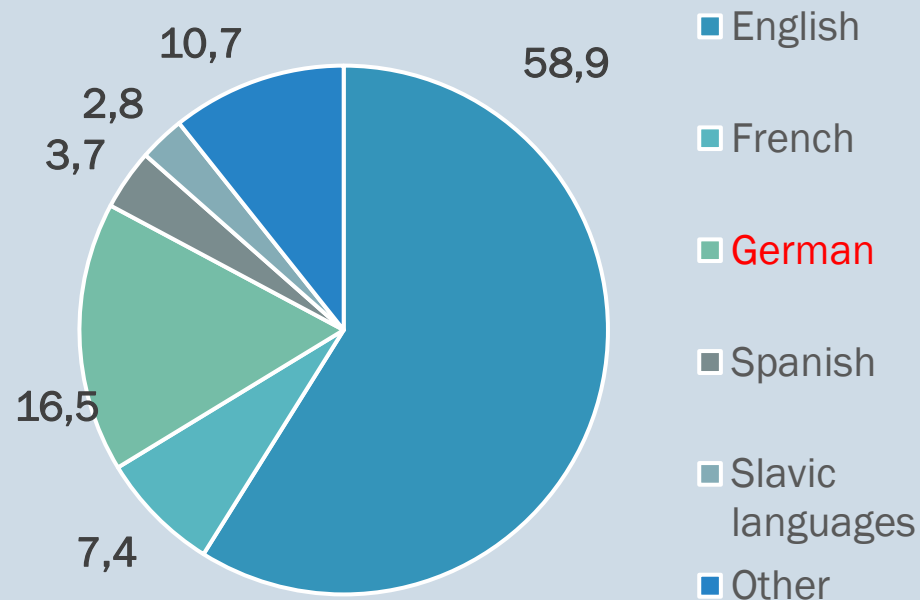
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Deep dive into important European markets for translated books: **Italy**

Share of original languages in translations into Italian (2022)



- The share of Italian authors has significantly increased in recent years
- Translations from German rose to significant popularity in Italy, accounting now for 16.5% (up from just 10% in 2010)
- But also the share in translations from 'other languages' expanded, showing increased curiosity for new discoveries

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Deep dive into important European markets for translated books: **Sweden**

- A **small**, but **thriving** publishing market, which is **different** from most other book markets in Europe or North America
- Strong Swedish companies going international > „**Storytel**“
- Declining ‚traditional‘ book sales – in book shops or online;
- In ‚units‘, **more digital books** are consumed than in print;
- Over 80 % of digital books consumed in ‚**subscription**‘;
- Huge growth in reading **English originals**
 - *Fiction*
 - *Children and Young Adult*

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Some astonishing trends

- Deep shifts in **reading habits** and **audiences**;
- The consumption of books from traditional publishers is declining in many markets;
- We must learn to make a difference between REVENUE and the number of consumed UNITS;
- **New genres** expand;
- The size of **non-traditional publishing** segments is huge

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There are some challenges!

(Of course, at some point, **AI** will be helpful in this.
But perhaps not right now, yet)



Who are
these people?



- Which are markets do we target?
- What exactly are our expectations?
- Are we selling? Or buying?
 - *What do we know about these audiences?*
 - *What do we know about their creations?*
- What is **our perspective** in this?

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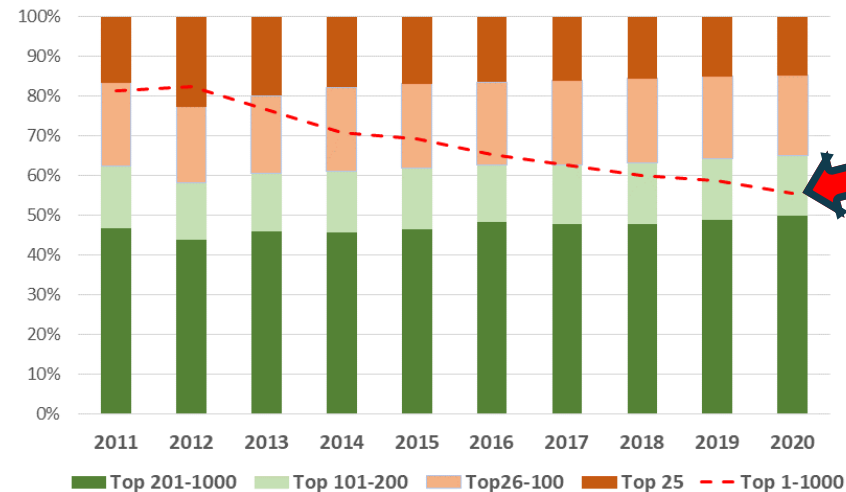


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Declining ,unit' sales are an increasing challenge in many European markets

- In a number of European book markets, the number of books (,units') has been declining for some time;
- This means a decline of ,reach' in the audience for traditional books;
- This co-incides with many ,new' ways of publishing that often are **not recognized** in the market.

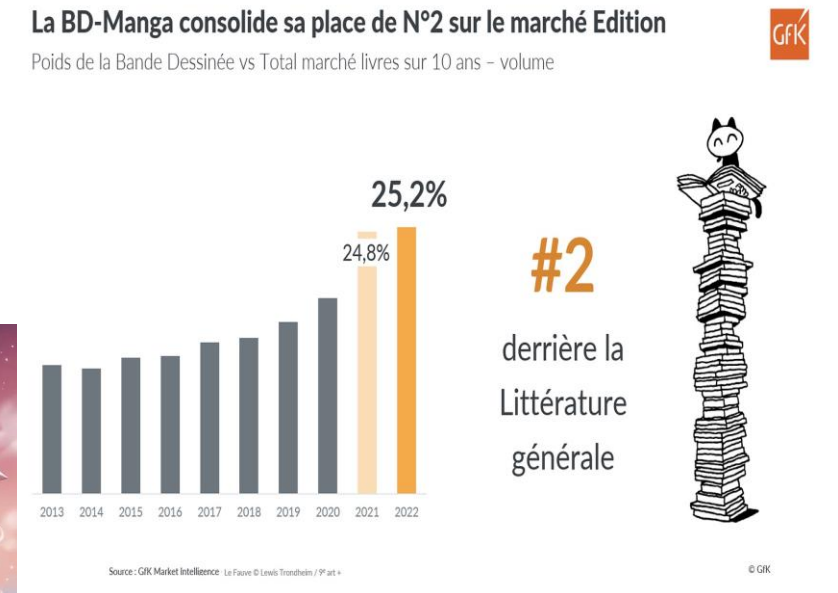
German language full year print top 1000 unit sales, fiction, 2011 to 2020 (data courtesy by MediaControl)



Exemplary new market trends + languages

> Manhwa + Webtoons (网络漫画)

- 1 out of every 4 books sold in France is a **comic book**.
- With 85 million units, comic books + Manhwa accounted for sales worth almost 1 bnEUR.
- **Webtoons** from Korea is a new format with hugely increasing popularity among young readers, all over Europe.



Reading in English

- Between 1/3 and 1/2 of young Germans read books in English originals!

Why so?

- To improve their skills
- In translation, something gets lost.
- To avoid waiting for a translation

Survey „Bock auf Buch“
(2024, GfK + Börsenverein)

“The sales of English books are **skyrocketing** (in Sweden) – so the industry is affected by the new **trend**”



Germany:

- Market share of English language books ca. 5% (sales up 10% in 2023)

Sweden

- Foreign language revenue 1/4 in all streaming

Buchreport + Swedish Publishers' Assoziation)

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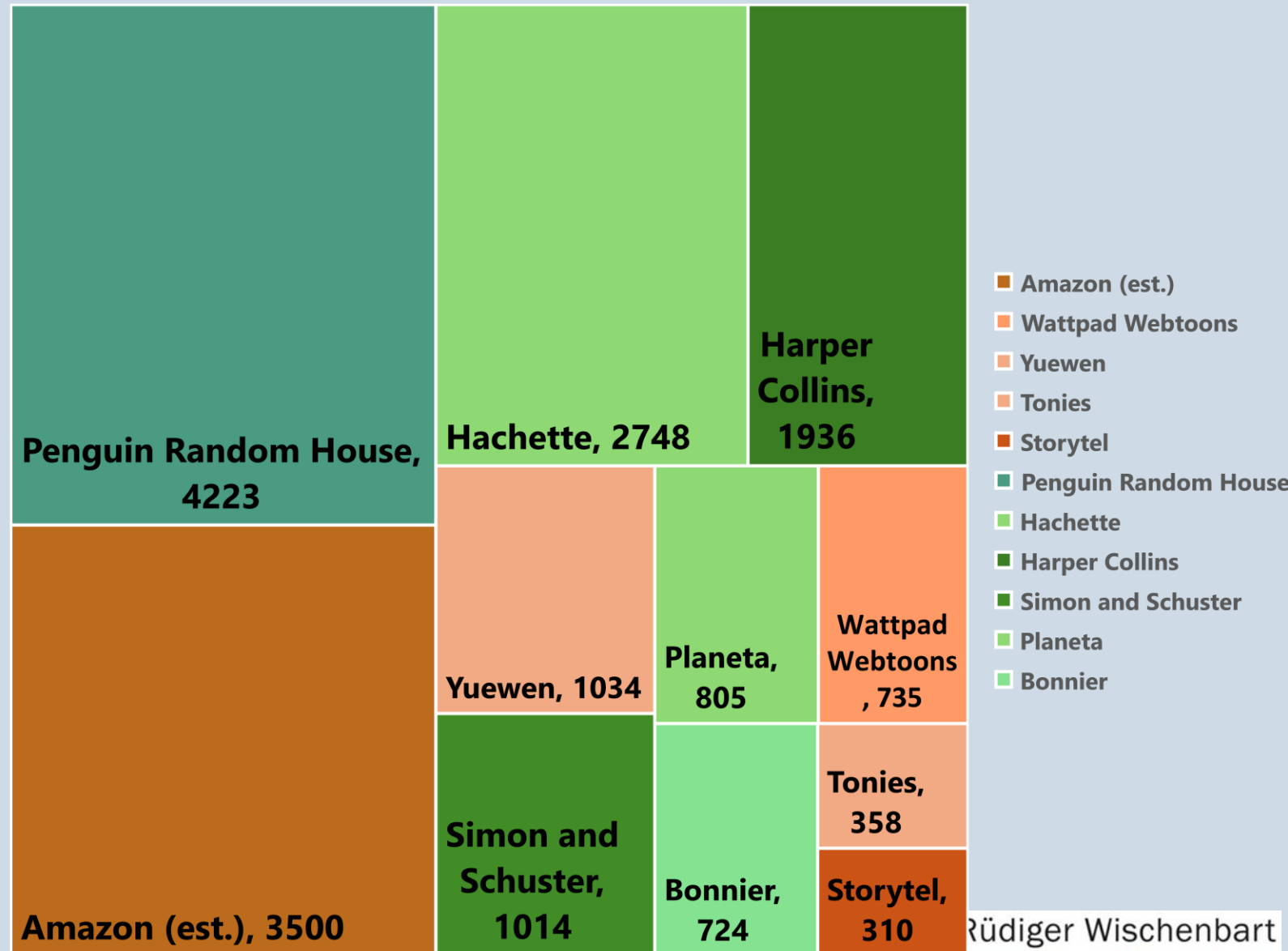
Expanding publishing models ,beyond‘ traditional publishers

While sales for many traditional publishers have stalled, new approaches and models expand dynamically:

- Self-publishing
- Author-driven publishing
- Animated story telling
- Platform driven audience communities

Forthcoming report
 „Publishing Beyond Publishers“ at
www.wischenbart.com/beyond

Revenue from publishing + streaming (in million Euros)



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Part 02

- The specifics of the markets for ‚books in translation‘;
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 - European regulation efforts
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Transforming habits!

AI in the transformed context of reading

- AI arrives to the publishing world in a moment of deep change;
- AI will **impact everything** in
 - Publishing
 - Marketing
 - Consumption of books



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The **many** roles and opportunities of adding Artificial Intelligence („AI“) to publishing

Fields and **applications**

- Managing available content (backlist and new titles);
- AI supported translating;
- Production support for many formats and channels;
- Targeted marketing

Opportunities

- Scouting for content to be translated;
- Experiment with different versions of a book or a story
- Get so much closer to your readers!

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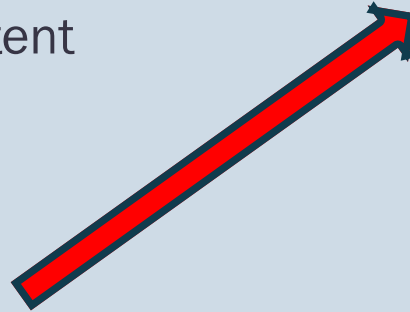
The many roles and opportunities of adding Artificial Intelligence („AI“) to publishing

Fields and applications

- Managing available content (backlist + new titles)
- Scouting for content to be translated
- **AI supported translating**
- Production support for many formats + channels
- Marketing + direct-to-consumer communication

This is the **obvious** part

- Hybrid workflows for
 - ✓ *Translating „a book“*
 - ✓ *Linear editing*
 - ✓ *Producing supporting materials to enrich the translated work (press releases, promotional materials, articles, excerpts, summaries)*



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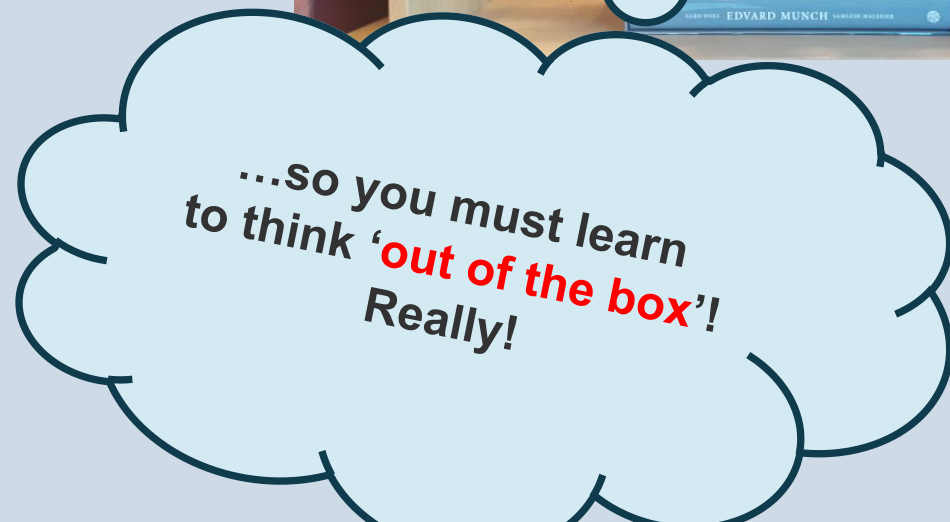
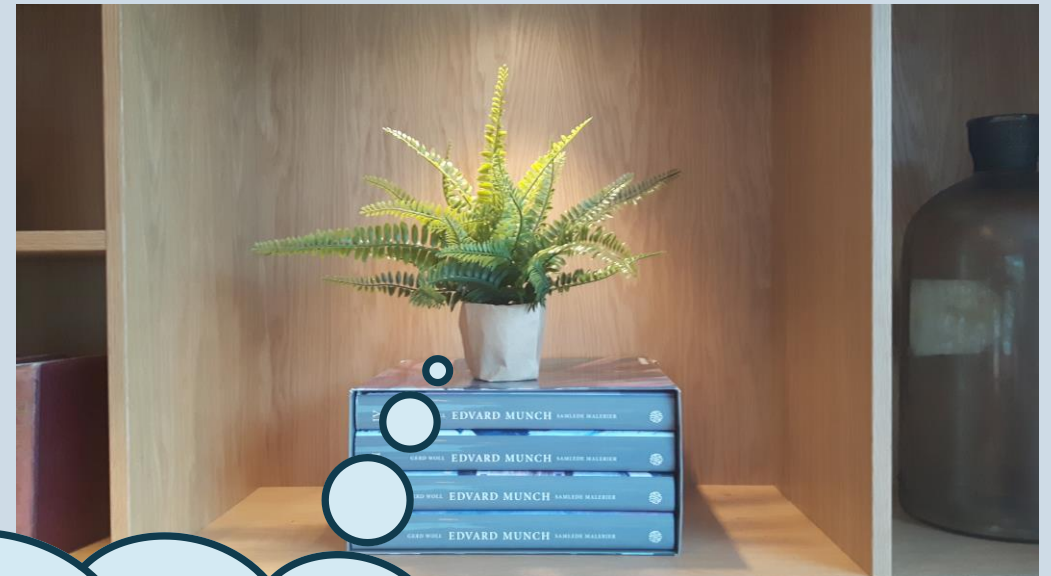


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Now what does this all mean to publishing translations specifically?

Translation markets are

- More specialized and fragmented
- Less well analyzed
- More risky, and loaded with ,extra cost‘
- Based on
 - *Informal networks*
 - *Knowledgable ,facilitators‘*



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The many roles and opportunities of adding Artificial Intelligence („AI“) to publishing

Fields and applications

- **Managing available content (backlist + new titles)**
- **Scouting for content to be translated**
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This is the **innovative** part

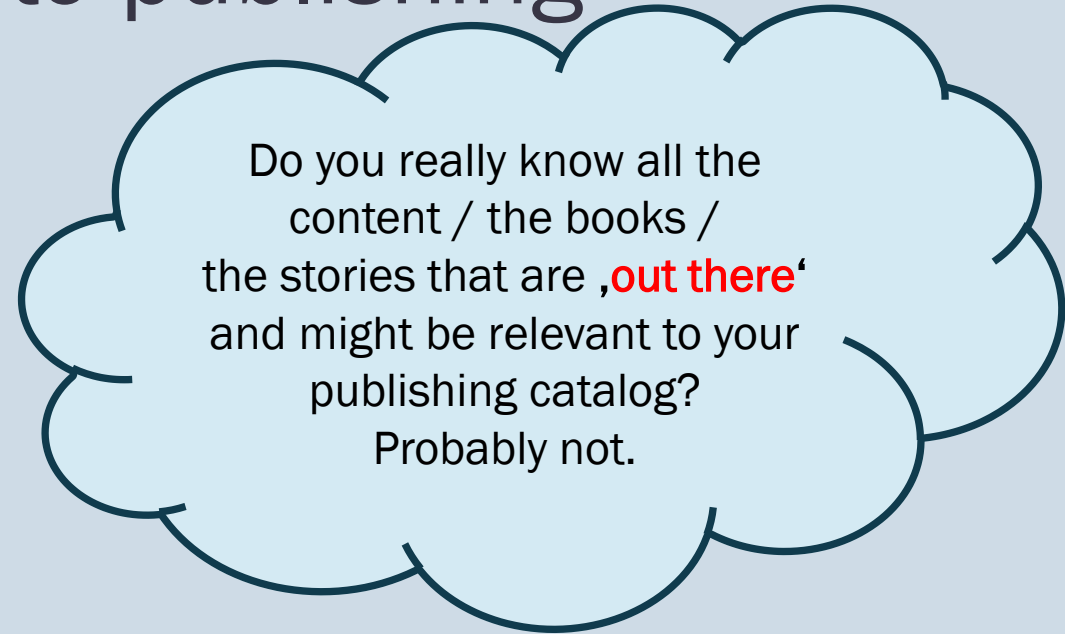
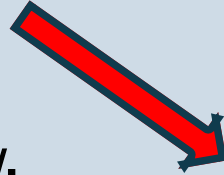
- Assessing what is already available
- Exploring and identifying new opportunities **out there**
 - ✓ *Finding new content*
 - ✓ *Looking beyond ‚just books‘
>> There is **so much more!***



The many roles and opportunities of adding Artificial Intelligence („AI“) to publishing

- „AI improves the way we access and connect existing knowledge
- AI-powered tools are transforming real-world scientific research and development, fuelling a new era of innovation.“

Azeem Ashar, Exponential View.



Do you really know all the content / the books / the stories that are **,out there‘** and might be relevant to your publishing catalog?
Probably not.

The many roles and opportunities of adding Artificial Intelligence („AI“) to publishing

Fields and applications

- Managing available content (backlist + new titles)
- Scouting for content to be translated
- AI supported translating
- Production support for many formats + channels
- **Marketing + direct-to-consumer communication**

“Marketing will evolve and prove to be the **most powerful** facet of AI’s foray into book publishing.”
*Thad McIlroy,
The Future of Publishing*

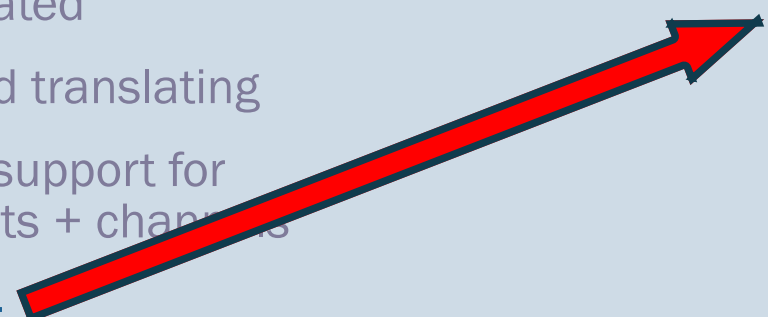
The many roles and opportunities of adding Artificial Intelligence („AI“) to publishing

Fields and applications

- Managing available content (backlist + new titles)
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- Production support for many formats + channels
- **Marketing + direct-to-consumer communication**

This is the **much more powerful** part

- Provide and analyze real-time sales information
- Competitive analysis of the market out there
 - *What is the competitive context for your works?*
 - *What related developments can you identify and track?*
- Identify your target audience first, and produce the content accordingly



The many roles and opportunities of adding Artificial Intelligence („AI“) to publishing

Fields and applications

- Managing available content (backlist + new titles)
- Scouting for content to be translated
- AI supported translating
- Production support for many formats + channels
- Marketing + **direct-to-consumer communication**

With AI supported tools you can **customize** and **personalize** your communication for every individual customer!

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Part 03

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 - **Replacement of human work through AI usage**
 - **Rights abuse**
 - **European regulation efforts**

Is AI ,**kill**ing‘ translators?

“(...) a quarter of illustrators and a third of translators say they've already **lost work** due to generative AI (...)”

The future of the profession is in **danger!**

Artificial intelligence and translation: the impossible dialogue?

Concerns articulated by professional organisations of translators

- Job loss and income loss;
- Unfair treatment as generative AI's language models ,harvest‘ copyrighted materials;
- Bad quality of – especially ,literary‘ – translations, because AI is just a **dumb machine**.

Voices from Germany (Börsenblatt), France (Actualitté) and US (Publishers Weekly)



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Is AI ,**stealing**‘ from authors and publishers?



“Some of these companies claim that they do not have to seek permission or pay for the works they are so freely usurping for their advantage, but this is **false**.”

(International Publishers' Association, IPA)

„Large Language Models“ (LLMs) for AI must be trained, and relevant training materials need to include relevant copyrighted materials.

Creators‘ and publishers‘ organizations are suing **AI companies** for using their content without permission and withut compensation!

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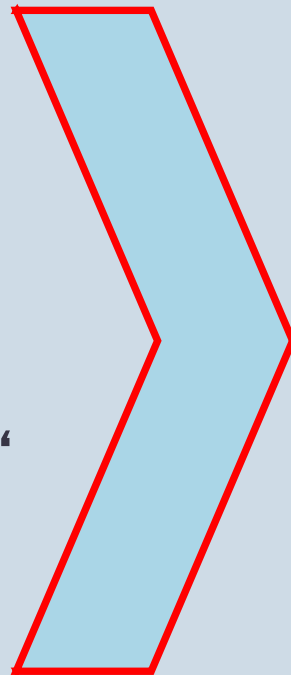
Regulating AI

European ambitions to draft a regulatory model



Identify red lines

- Define ‚risk levels‘
- Require transparency
- Protect creators‘ ‚rights‘ (notably copyright)



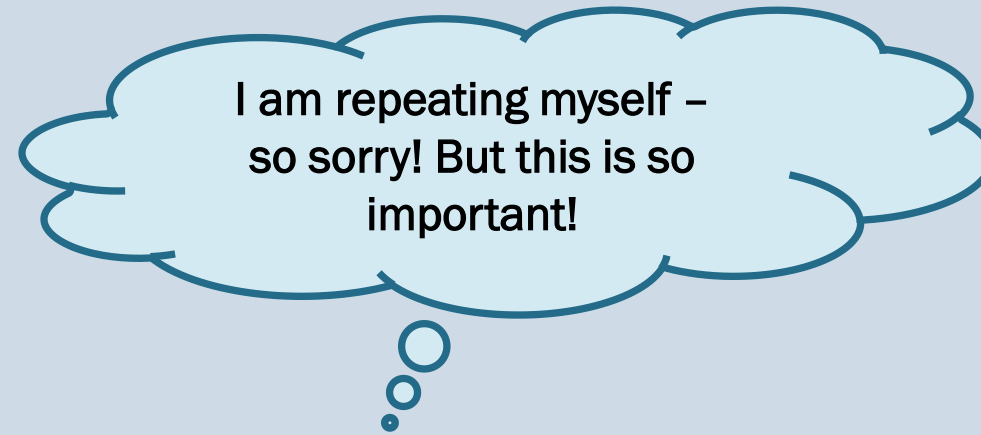
Corner stones

- Establish **control** against abuse;
- Establish clear, and yet practical rules for **flagging** use of AI;
- Require ‚**fairness**‘ in usages of copyrighted content in training materials for AI and Large Language Models (LLM’s).



Conclusions

- We must ask new questions
What **audiences**?
Which **genre categories**?
Which **channels**?
- We must risk new perspectives
An **old debate** returns:
Are books different
from other content media?



- A transforming digital landscape
Multi-format, multi channel,
multi model, in a
connected digital ecosystem!
- Infrastructure versus creation >
,Who is the **rider**, and who the **horse**?‘

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