

Annual Business Press Conference

Back to the readers –
Germany's book market in 2018/19

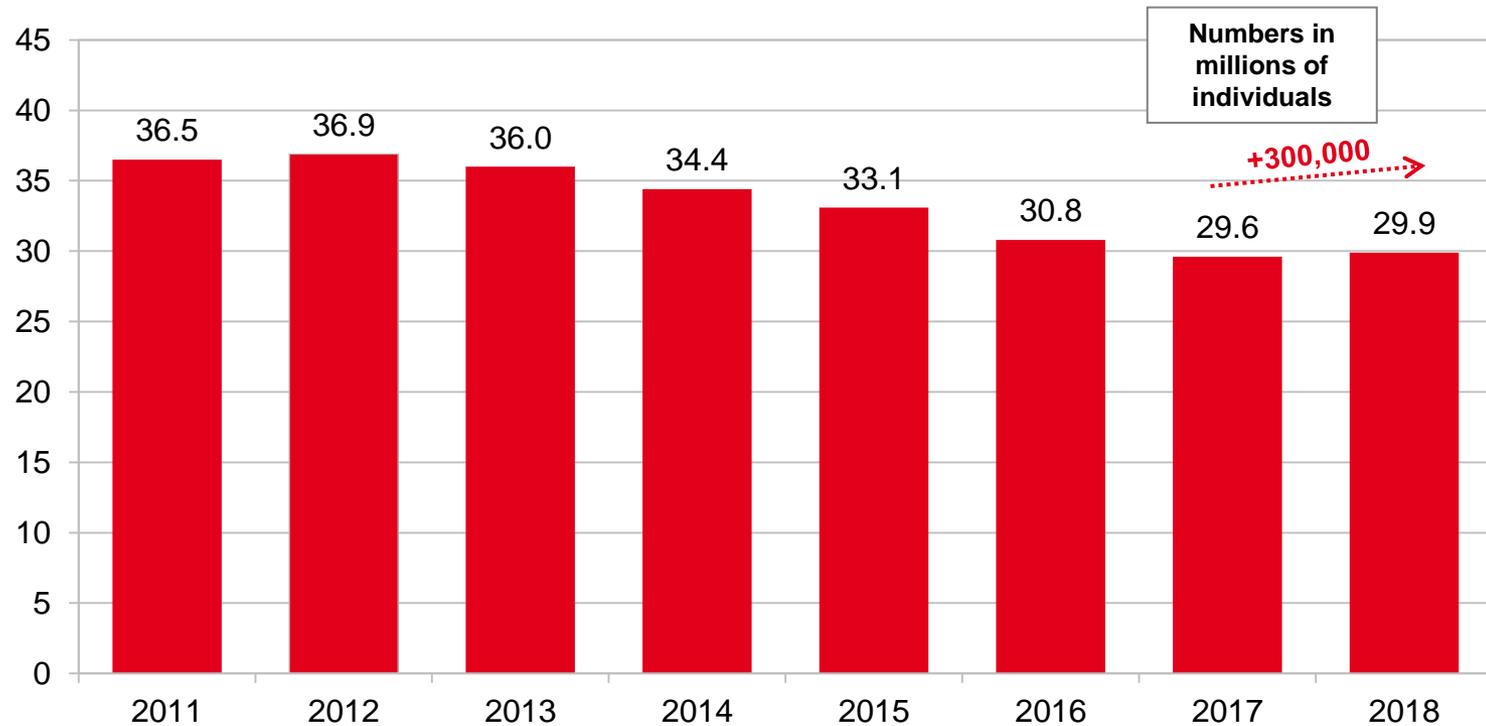
Frankfurt am Main, 6 June 2019

A turning point on the book market

- The 2018 study “**Book buyers – quo vadis?**” marked a turning point in the book industry
- **Insights:** In the study, individuals who had stopped buying books stated that they value books very highly, but that reading fell by the wayside in their everyday lives due to the wealth of digital offerings and a sheer lack of time. They also spoke of a lack of contact points to books as well as a degree of disorientation among the large array of choices.
- The book industry thus launched a **new approach to attracting customers**
- Publishers and bookshops began enhancing their **proximity to customers** and developed **new ways of raising enthusiasm for books** (new store concepts, creative event formats, social media initiatives, new storytelling formats and programmes)
- First signs of success: in 2018, the **number of book buyers rises** for the first time since 2012. Stable book market in 2018, growing revenues in the first few months of 2019.

Book buyer growth

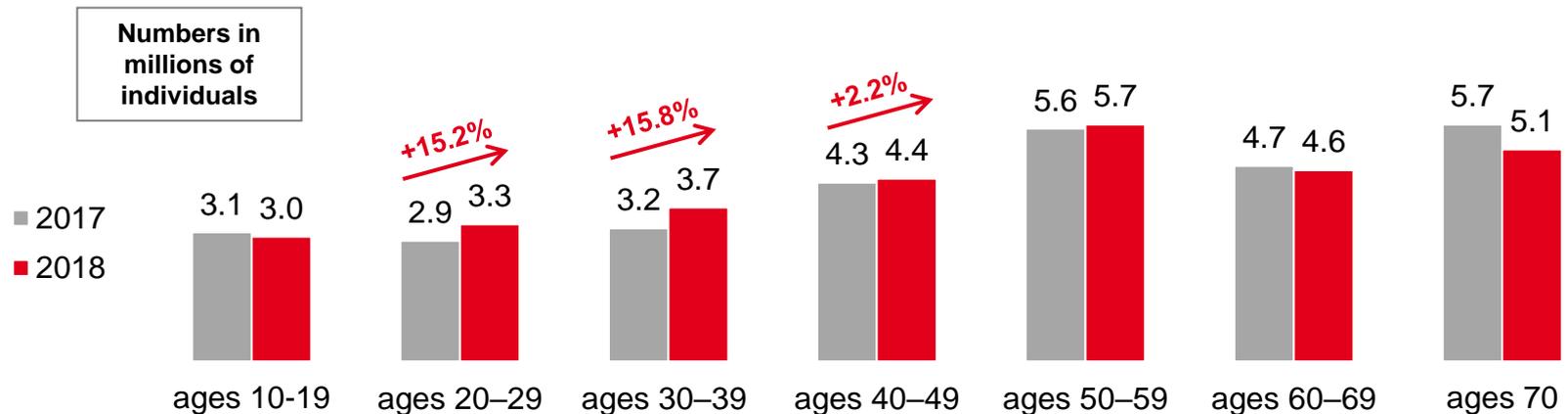
Number of book buyers on the consumer market



Based on key figures; time periods extend from January to December;
German private consumers aged 10 and up; **excluding school books and text books,**
including downloads (audio books and e-books);
Source: GfK Consumer Panel Media*Scope Buch

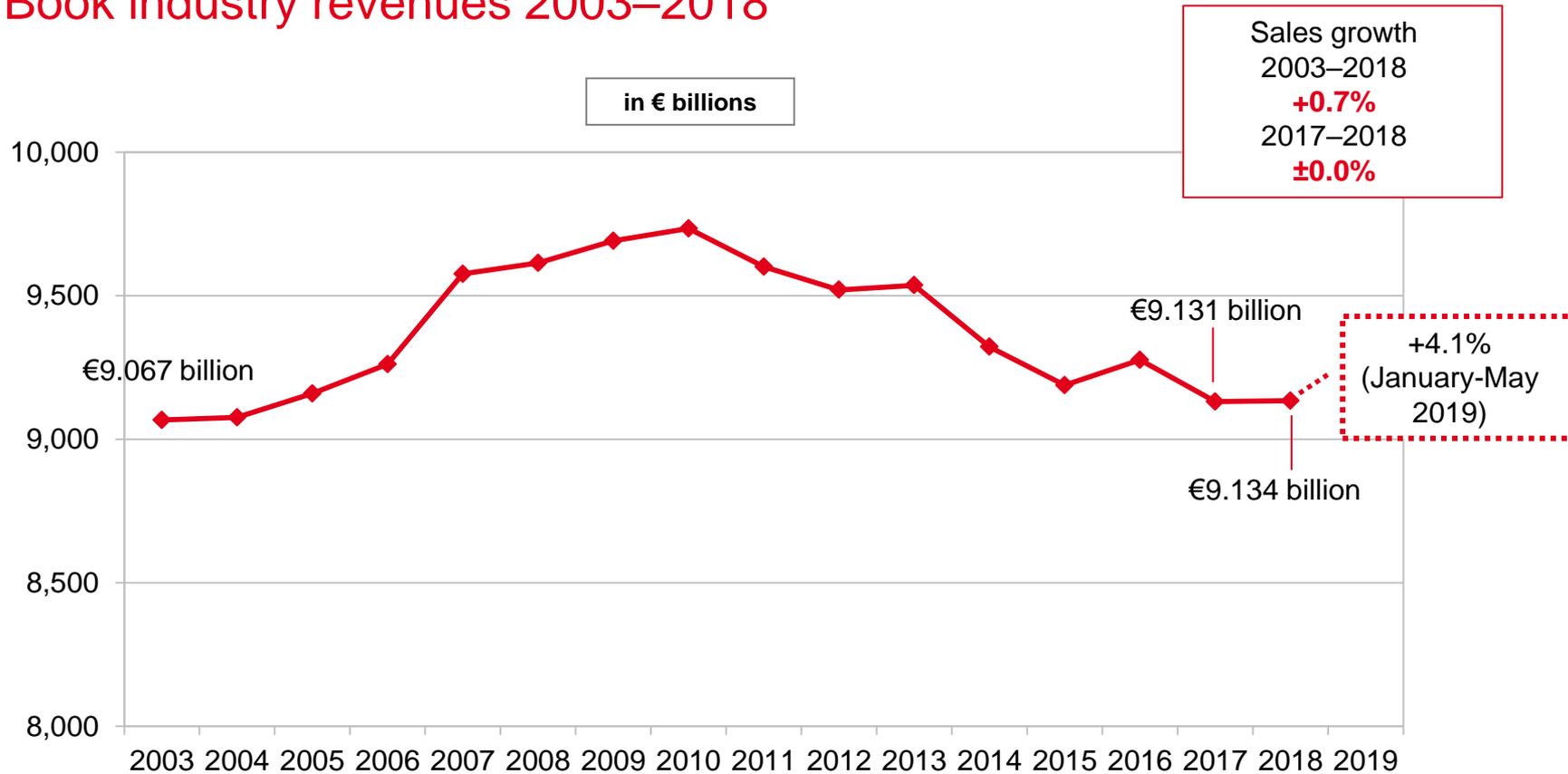
Number of book buyers on the consumer book market by age group

In 2018, the number of book buyers on the consumer book market rose in those age groups (20-to-49-year-olds) that had shown the largest decreases in buyers in recent years.



Based on key figures; time periods extend from January to December;
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Source: GfK Consumer Panel Media*Scope Buch

Book industry revenues 2003–2018



Source: Börsenverein des Deutschen Buchhandels, 2019: Media Control

Current growth

Sales volume and revenue January–May 2018/2019

Changes compared to
same timeframe in the
previous year



Distribution channels: retail bookshops, train station bookshops, department stores, electronics stores and drugstores (cash sales) as well as e-commerce (excluding the category of school and textbooks (WG8), excluding downloads)

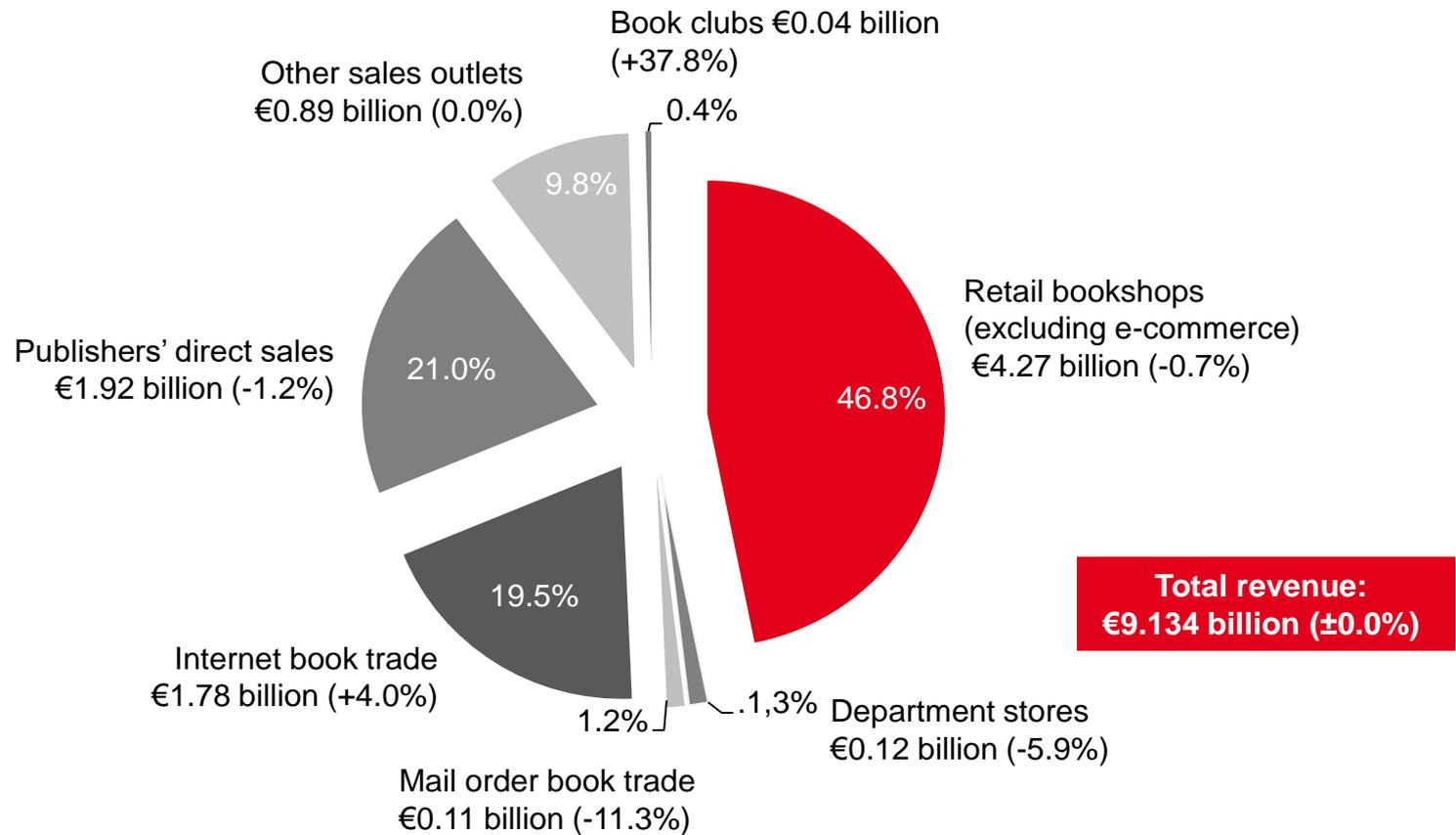
Source: Media Control

Five tasks for the book industry in 2019

- **Expand strategies to attract book-buying customers:** Bookshops and publishers should continue to take action and develop new ideas
- **Improve customer orientation and the image of book reading:** Industry-wide work on developing a modern, customer-friendly orientation system and further expanding book-industry marketing
- **Maintain high-performance industry logistics:** Focus on general optimism that key industry wholesaler KNV will be able to carry on its work after company restructuring
- **Restore remuneration for publishers:** Secure the economic position of publishers after they were cut out of remunerations from collecting societies, after the KNV insolvency and the Act on Copyright and the Knowledge Society (Urheberrechts-Wissensgesellschafts-Gesetz, 2018)
- **Foster freedom of speech and a healthy culture of debate:** Contribute actively to the formation of informed opinions in society, e.g. with the German Non-Fiction Prize (Deutscher Sachbuchpreis)

Key market indicators 2018

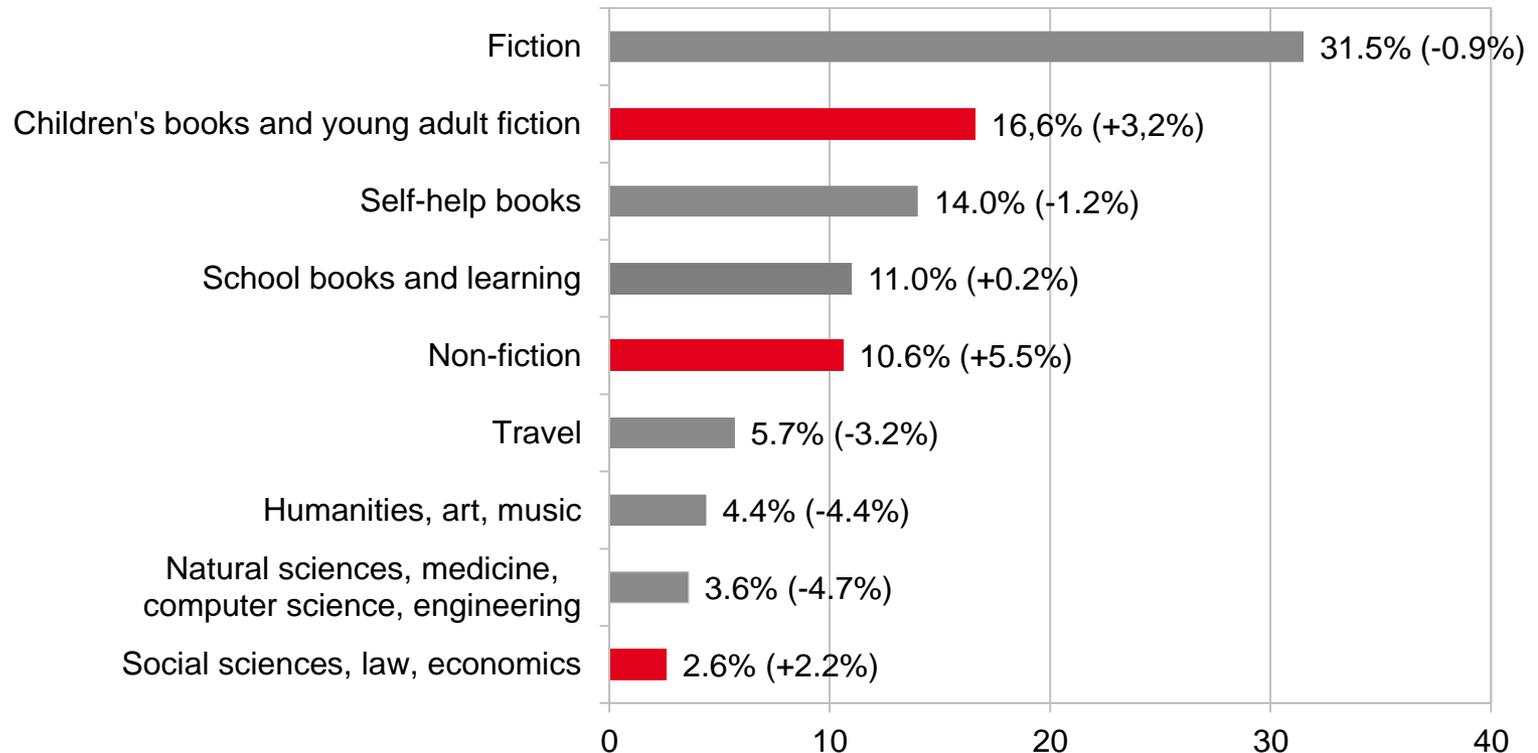
Distribution channels in 2018



Source: Börsenverein des Deutschen Buchhandels

Book trade distribution

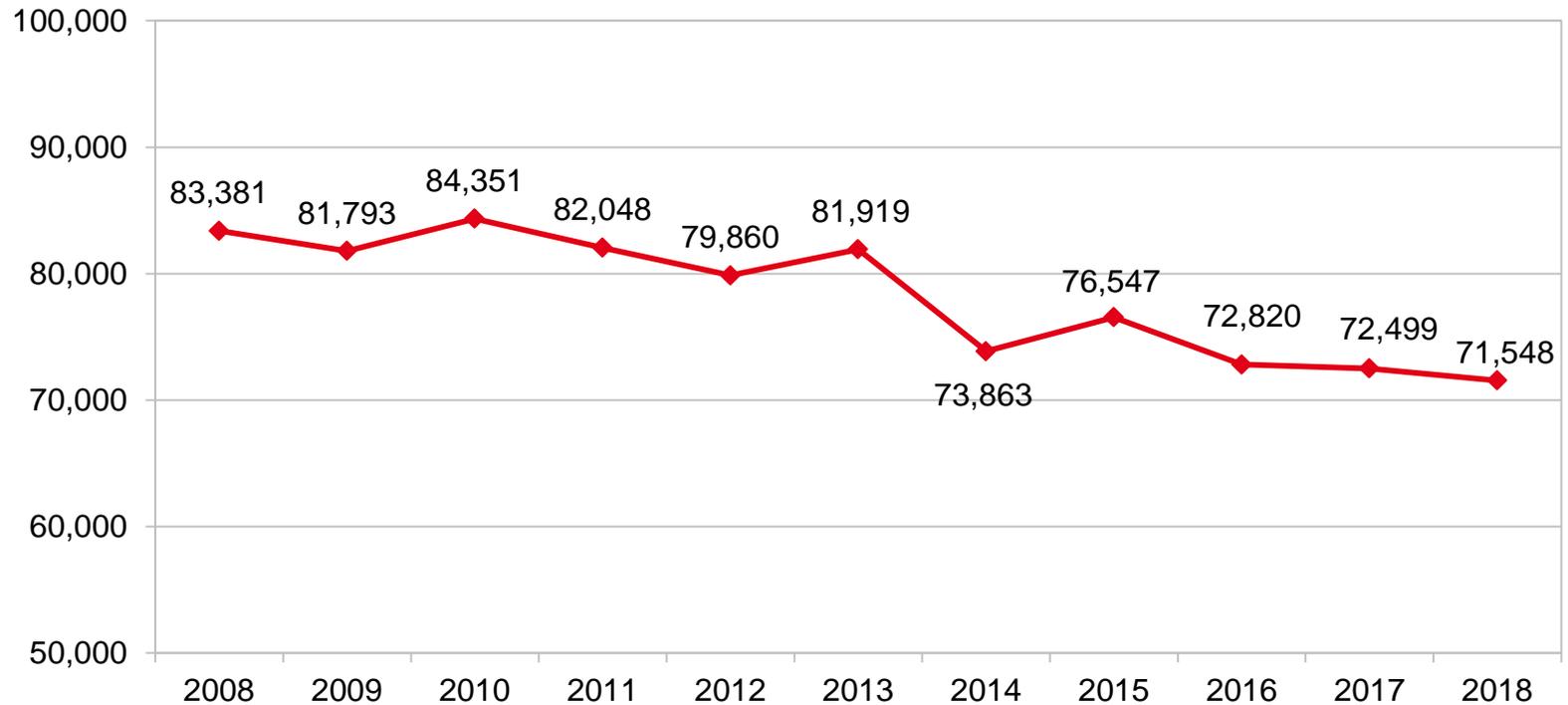
Market share by product category in 2018 (changes compared to previous year)



Source: Media Control

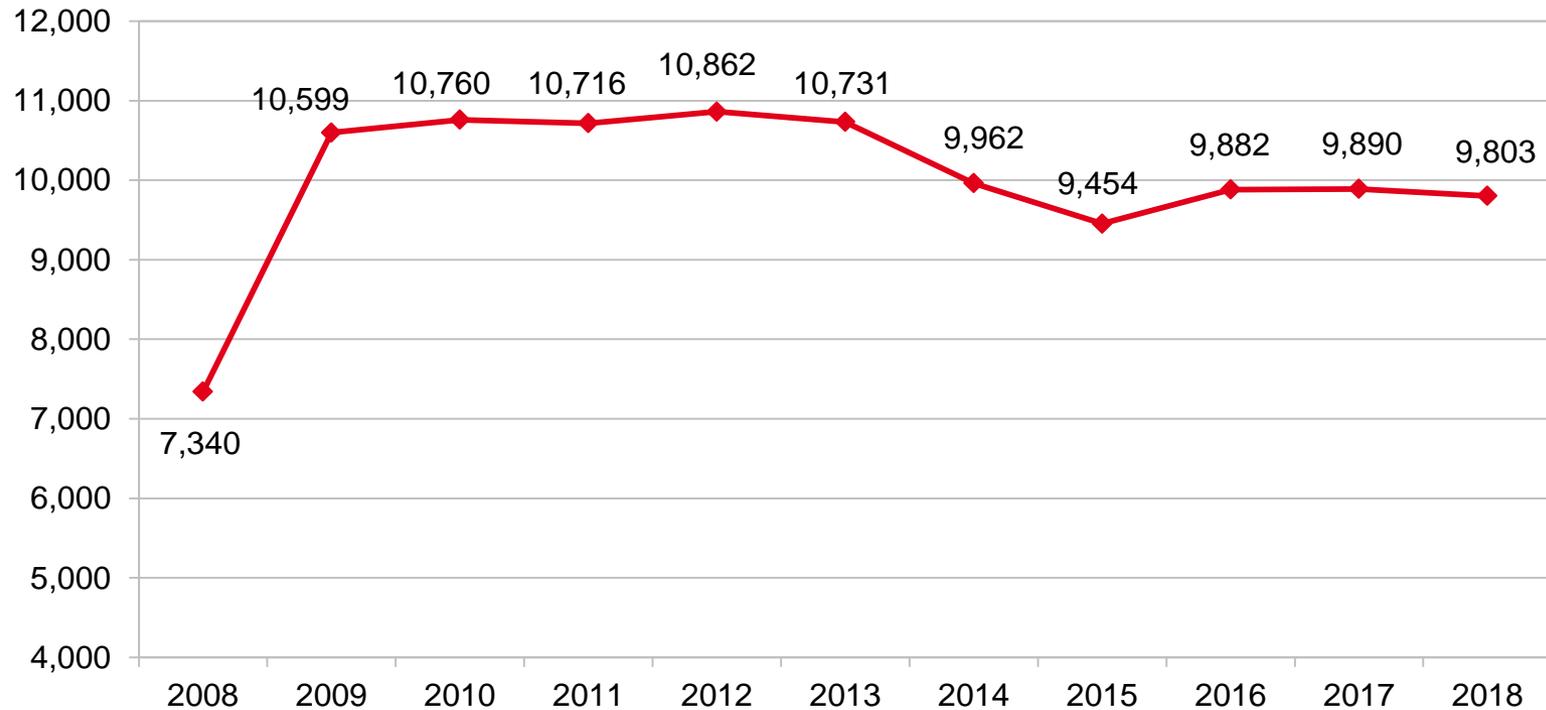
Book trade: production

Production of first-edition titles 2008–2018



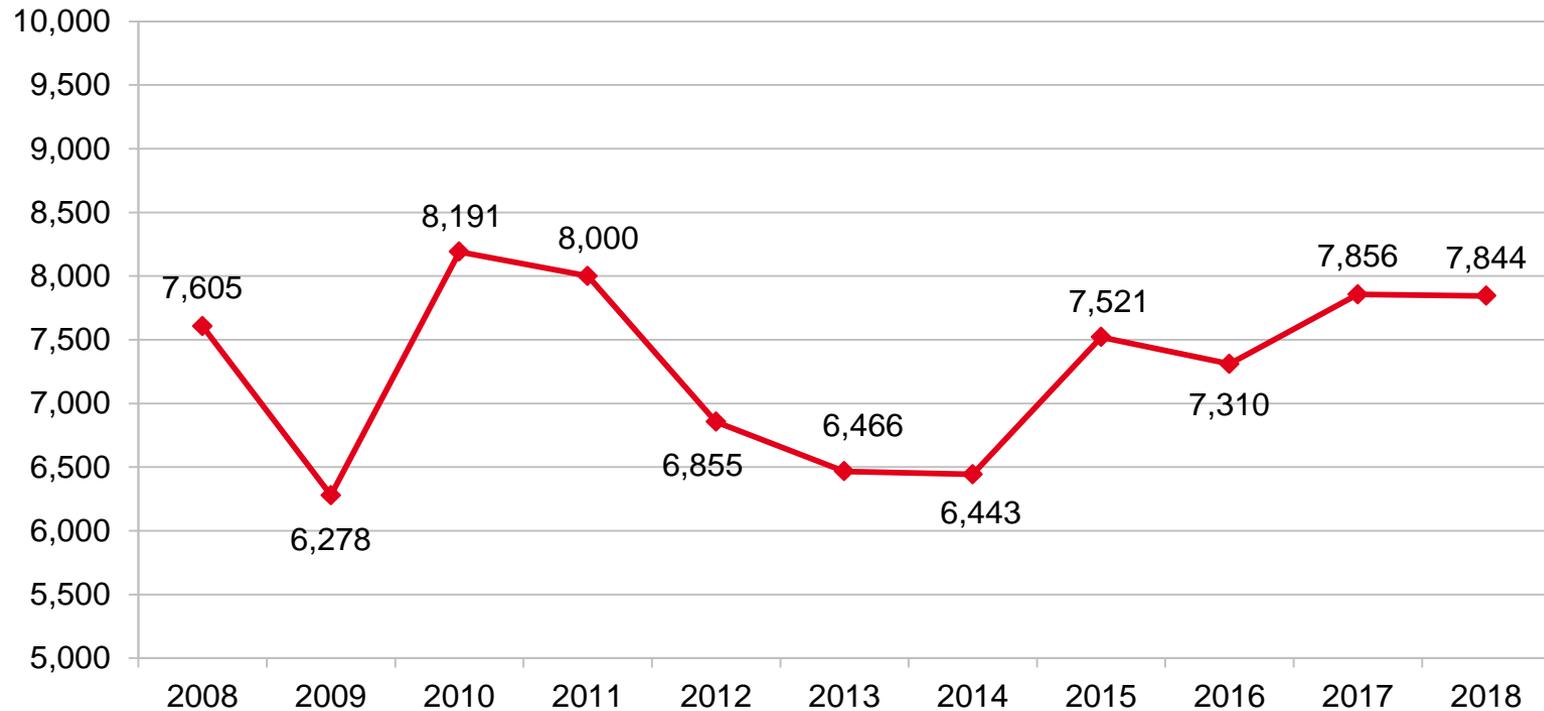
Source: German National Bibliography, VLB
Calculated by: Börsenverein des Deutschen Buchhandels

Translations into German: first editions 2008–2018



Source: German National Bibliography, VLB
Calculated by: Börsenverein des Deutschen Buchhandels

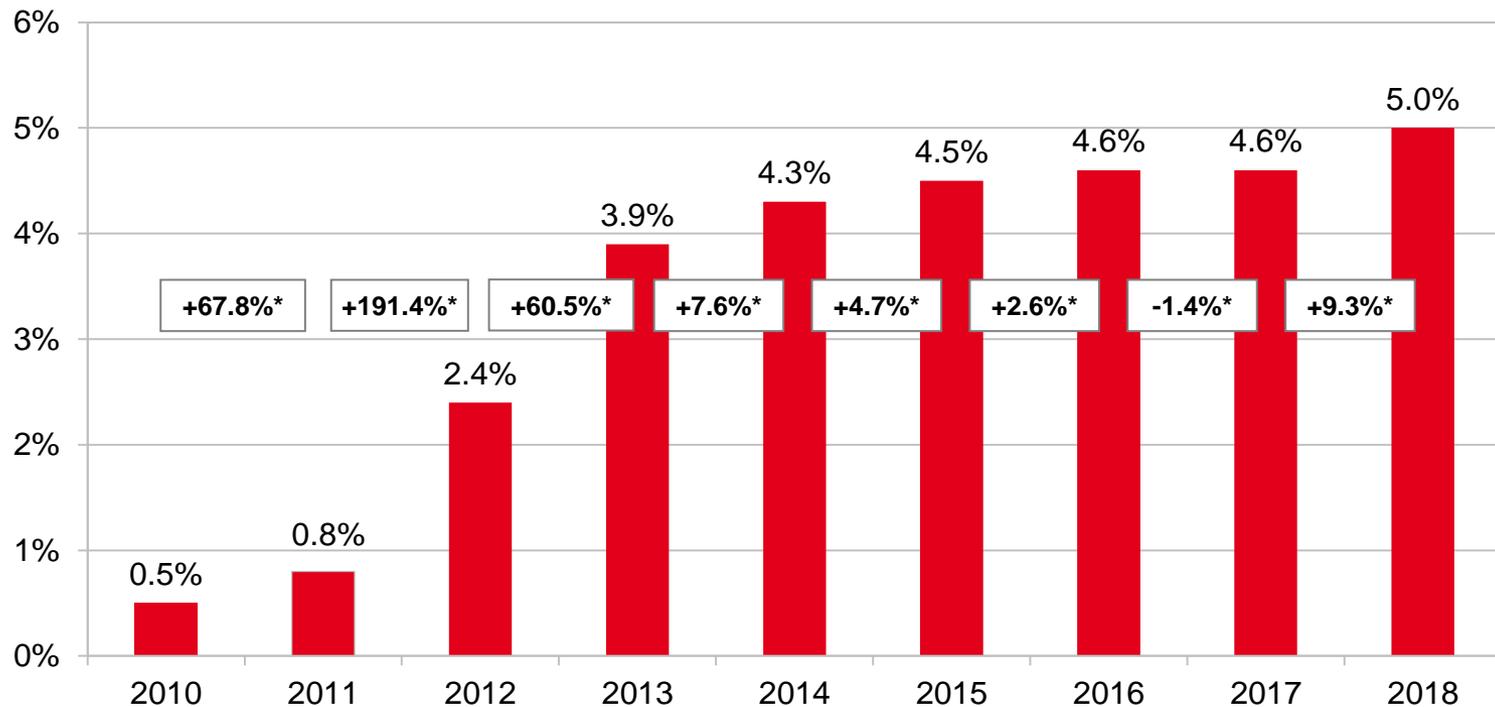
Licenses sold abroad 2008–2018



Source: License survey, Börsenverein des Deutschen Buchhandels

E-books in Germany in 2018

Revenue share and sales growth from 2010 to 2018



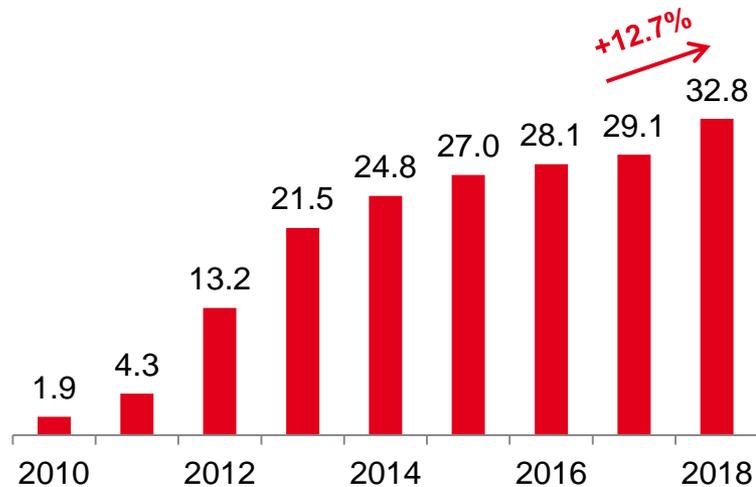
* Change in level of sales as compared to previous year

Based on key figures; time periods extend from January to December;
German private consumers aged 10 and up; **excluding school and learning books**,
Included are all purchases of individual e-books starting at a price of €0.49
Source: GfK Consumer Panel Media*Scope Buch

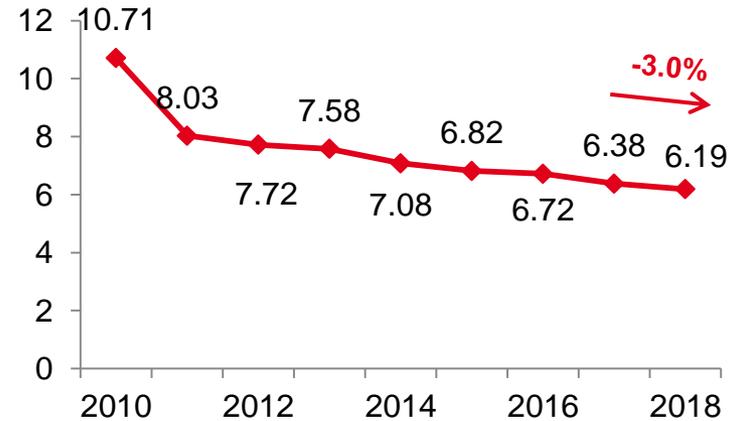
Sales volume and average purchase price 2010–2018

In 2018, the volume of e-books sales on the consumer market rose by 12.7 percent to reach 32.8 million units. The average price paid by consumers dropped by €0.19 to reach €6,19.

Sales volume in millions of e-books



Average price paid per e-book in €

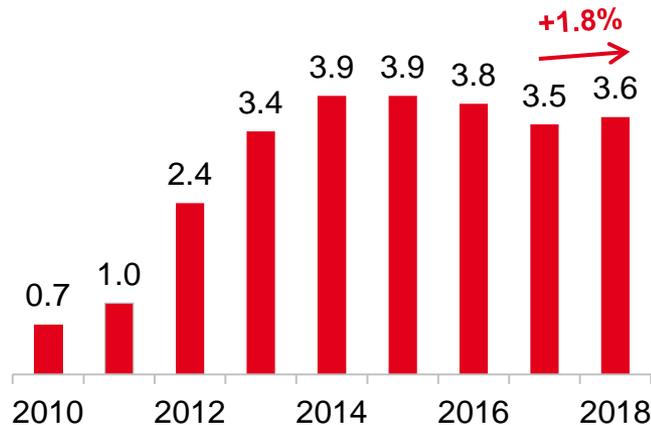


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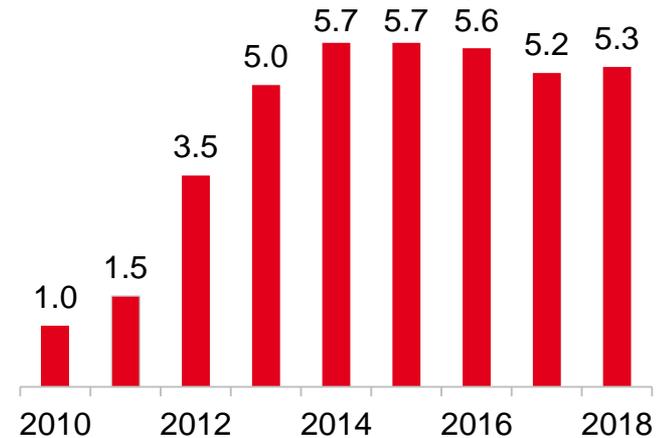
E-book buyers: number and share of the population 2010–2018

In 2018, 3.6 million people bought e-books. This brought the share of e-book buyers in the overall population up to 5.3 percent.

E-book buyers in millions of people



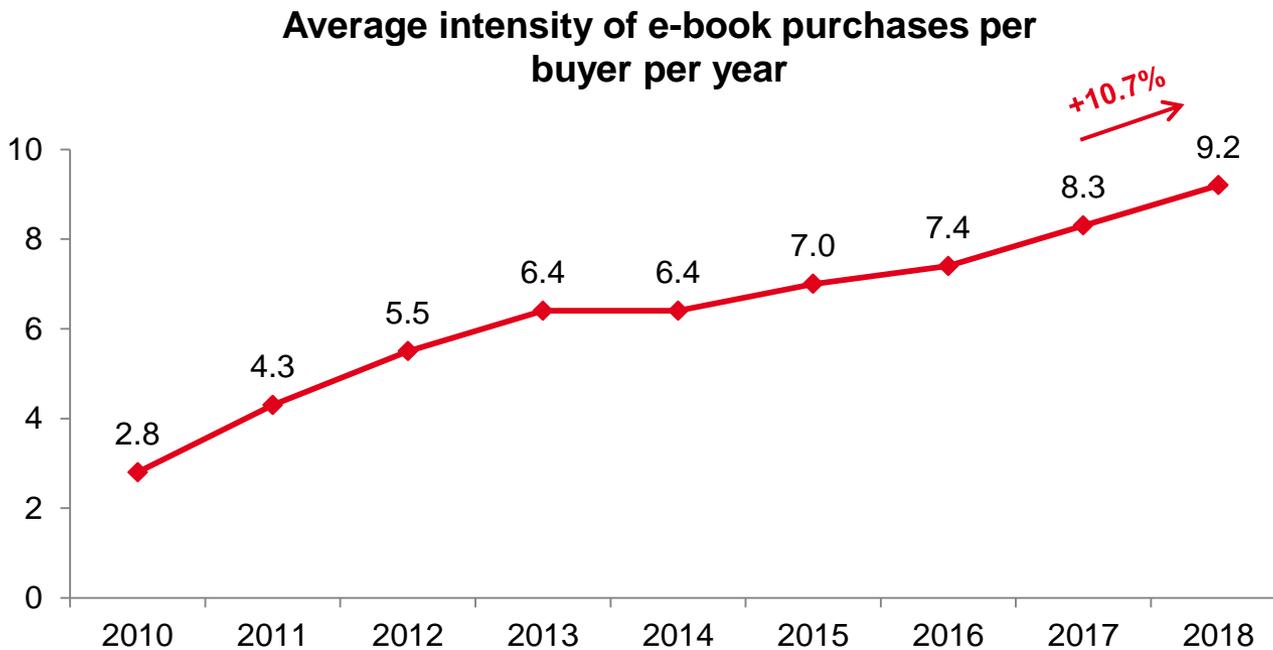
Share of e-book buyers in the overall population in percent (customer reach)



Based on key figures; time periods extend from January to December; German private consumers aged 10 and up; **excluding school and learning books**, Included are all purchases of individual e-books starting at a price of €0.49
Source: GfK Consumer Panel Media*Scope Buch

Purchase intensity of e-books 2010–2018

In 2018, the average number of units purchased by e-book buyers on the consumer market rose to 9.2 titles.



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