

How young people find and buy books today

Touch Points, Selection Criteria and Purchase Behaviour 2023

Consumer Panel Services GfK,
commissioned by:

*Arbeitsgemeinschaft von Jugendbuchverlagen (avj)
& Börsenverein des Deutschen Buchhandels*



**Börsenverein des
Deutschen Buchhandels** 

Themes

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Background of the Study

- The Arbeitsgemeinschaft von Jugendbuchverlagen (avj) (Youth Book Publishers Association) and the Börsenverein des Deutschen Buchhandels (German Booksellers and Publishers Association) would like to learn more about the **young target group of buyers and readers as well as the market for books for Children/Teens and books for Young and New Adults**, for the interest of the book industry.
- 2) → The main objective of the study is to understand **how young people discover books**, which **selection criteria** are relevant and **how** they purchase books.

Modular Design

- The questions are answered using two modules:
- 1 **Measure of purchasing behaviour primarily in the market for books for Children and Teens from the Consumer Panel MediaScope**, in which purchases in the book market are continuously surveyed. In addition, a wealth of information is available on book buyers, including their attitudes, media behaviour etc.
 - 2 **A reader survey in the panel** provides additional information on purchasing behaviour. The aim is to gain a better understanding of **how young people purchase books**, how they become aware of books, how they select books and what role social media, for example, plays in this.

Module 1: Measure of Purchasing Behaviour



- **Method**
Continuous recording of all purchases and spending in the book market in the Consumer Panel MediaScope
- **Sample**
n=20,000 people aged 10 and over (gross)
The sample is representative of the German population and is weighted/extrapolated accordingly.
- **Time Frame**
Data from 2012, 2019 and 2023

Module 2: Reader Survey



- **Method**
Online and offline survey in the Consumer Panel MediaScope
- **Sample**
n=1,368 people aged 10 and over
(Pre-screening according to book use in January 2023)
- **Target Group**
Readers with a connection to books for Children/Teens, books for Young/New Adults, as well as parents of book-loving children

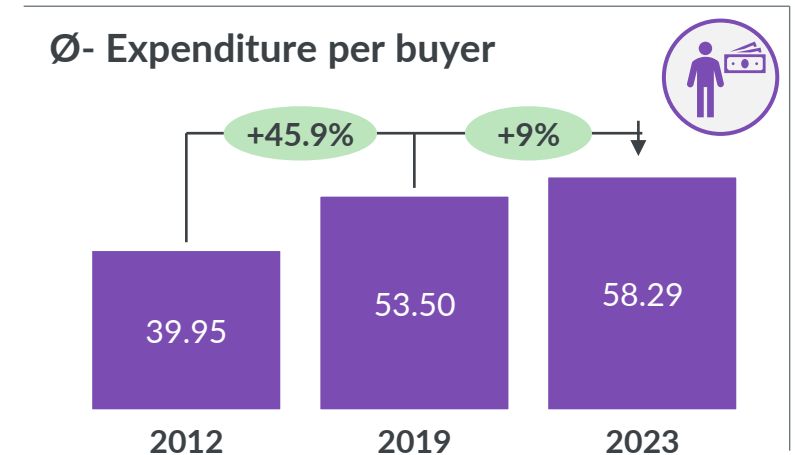
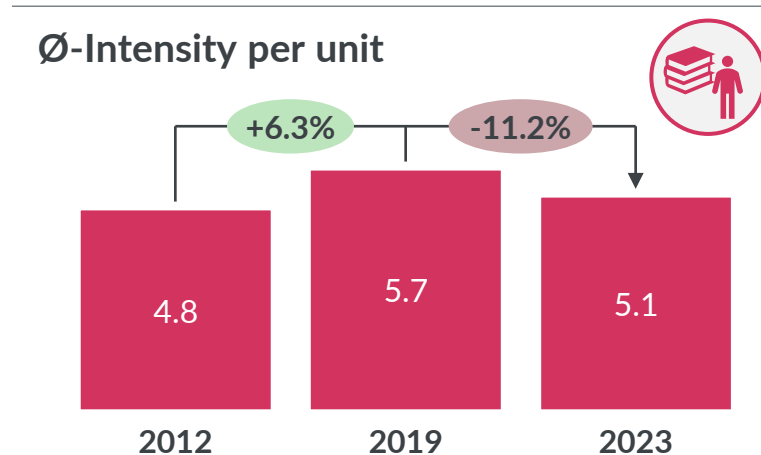
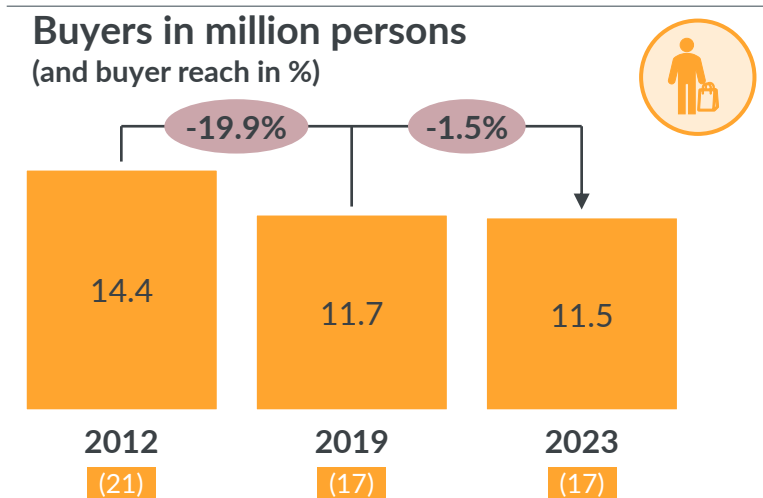
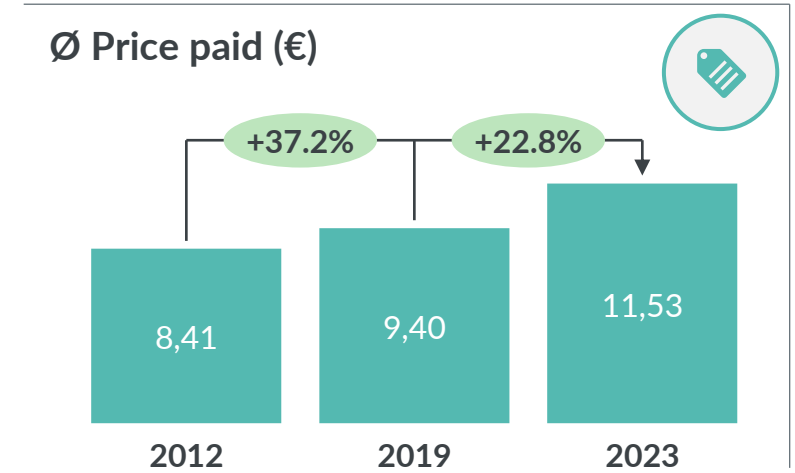
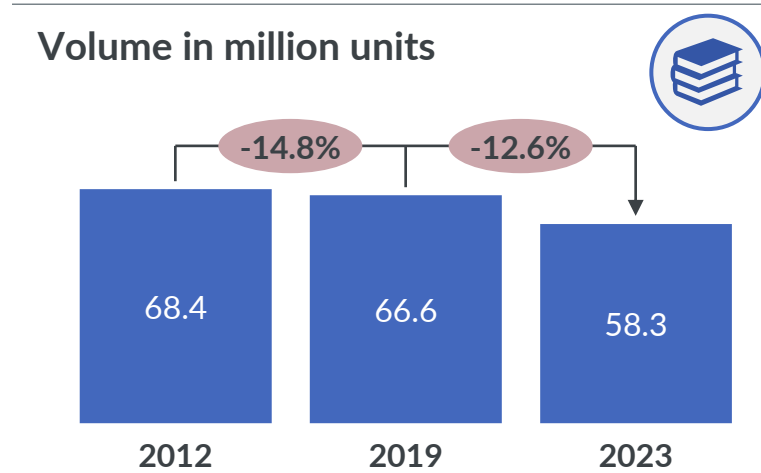
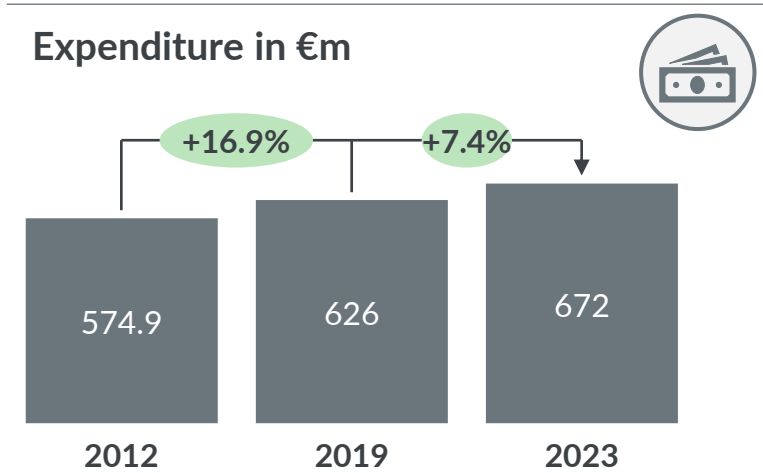
Unweighted Number of Cases:
 - n=434 10 to 15-year-olds
 - n=184 16 to 19-year-olds
 - n=204 20 to 29-year-olds
 - n=546 30+ year-olds with children (0 to 14-year-olds) within the household who purchase books



Development of the Book Market for Children/Teens

Book Market for Children / Teens – Key Facts

Higher prices paid compensate for the decline in buyers and volume since 2012



Young Readers up to the Age of 19



Definitions of the Young Reader Target Groups



Up to 3 years



4 to 6 years



7 to 9 years



10 to 12 years



13 to 15 years



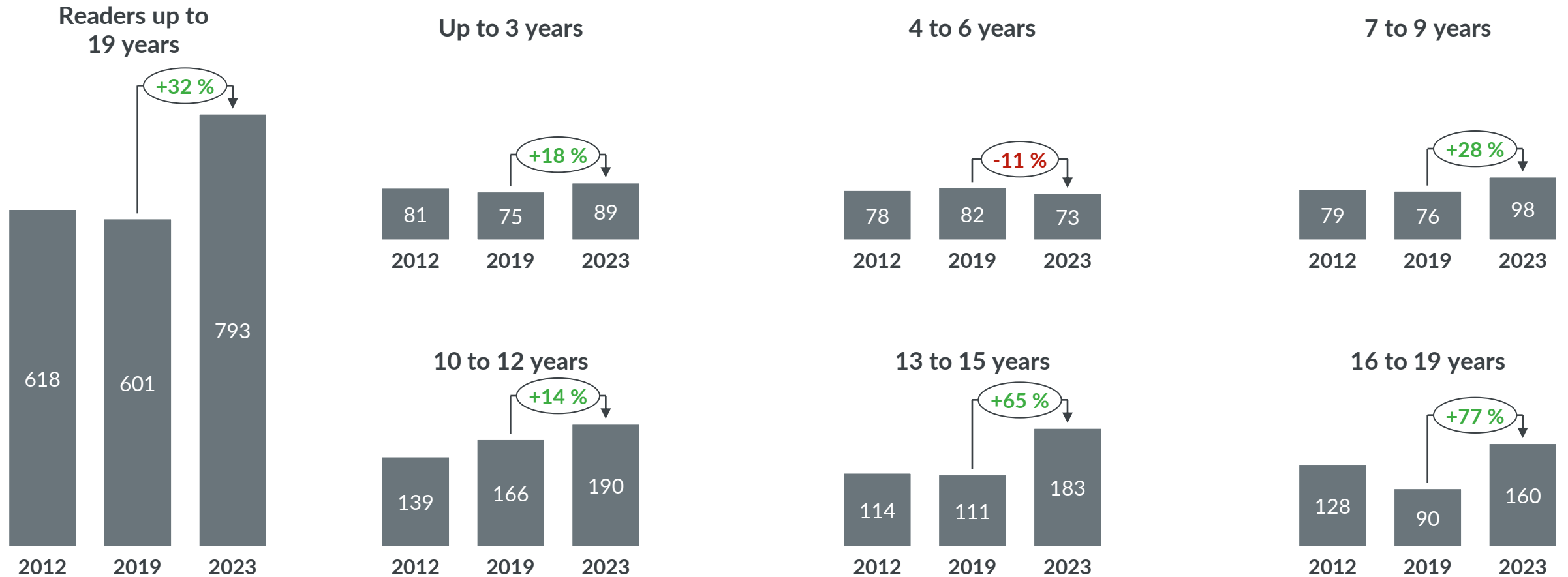
16 to 19 years

Change of perspective: From product group to target group

- While the previous section focussed on the buyers of books for Children and Teens, **the following section looks at book users/readers up to the age of 19 in the overall market i.e. regardless of genre.**
- **In this case, the age of the reader is taken into account** (those who buy for themselves and those who receive books as gifts are combined)
- **A comprehensive view of all books that the respective age group has access to in the consumer market**
- This is methodically viable as the Consumer Panel includes the age of book buyers aged 10 years and up. Furthermore, for each book purchase, the panel provides information on whether the book was purchased for oneself or for others. In the latter case, the age and gender of the receiver (= reader) is requested.

Development of the Reading Target Groups – Expenditure (for these) in €m

Expenditure for readers up to the age of 19 has increased by 32% since 2019, driven in particular by spending by and for children and teens aged 13 and up



Genres Purchased According to Reading Target Groups – Expenditure (for these) in %



Only 60 % of expenditure for young people is accounted for by the product group Children's/Teen

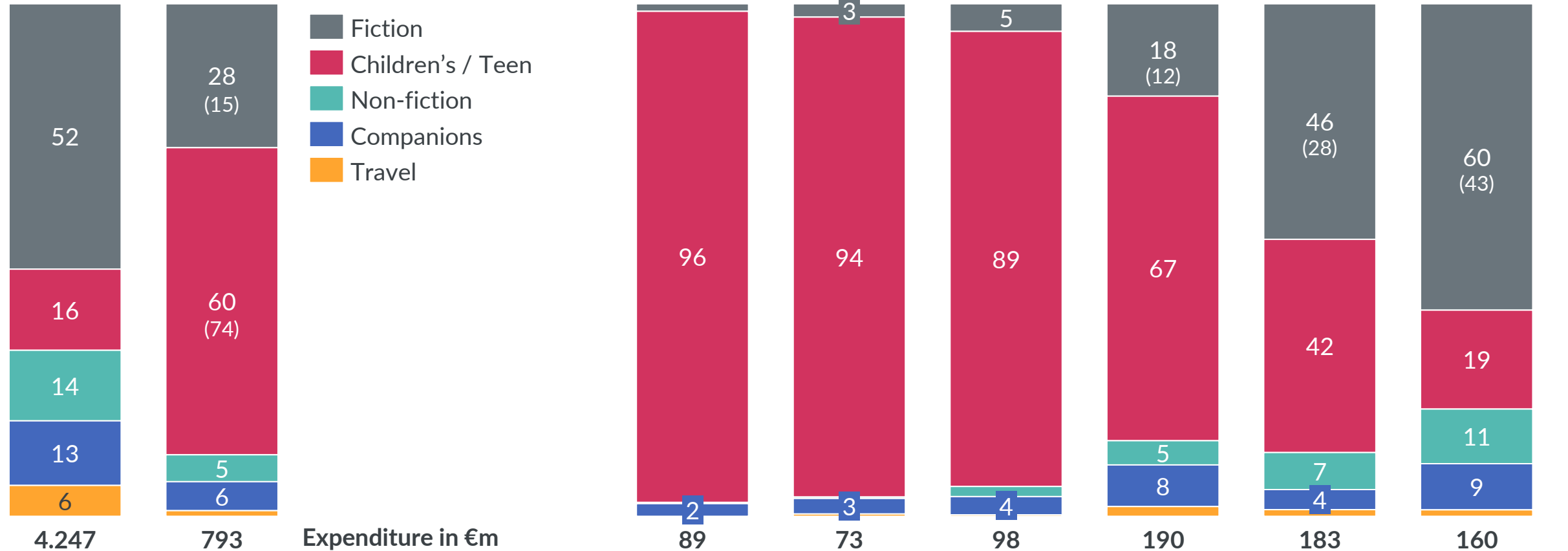
From the age of 10 onwards, other genres become significantly more important – and this trend is growing



2023

Values in brackets 2019

Book Market Readers up to 19 years



Book market incl. e-books & audiobooks (physical & download, excl. Audible subscription fees) | Period Jan - Dec 2023, values in brackets period Jan - Dec 2019
 Figures <3% are not labelled for reasons of readability.

Behaviour of Young Target Groups in the Book Market

Module 2

Module 2: Target Groups in Focus*

Book users from various ages groups



10 to 15-year-old readers

Read books themselves / Listen to audiobooks

Offline/Online survey on own reading and information-related behaviour



16 to 19-year-old readers

Read books themselves / Listen to audiobooks

Offline/Online Survey on own reading and information-related behaviour



20 to 29-year-old readers

Read books themselves (Book genre: Children's, Teen or Young / New Adult)

Offline/Online survey on own reading and information-related behaviour



30+ year-old parents with children who have a connection to books

30+ year-olds with children between the ages of 0 and 14, who use books from the Children's /Teen genre

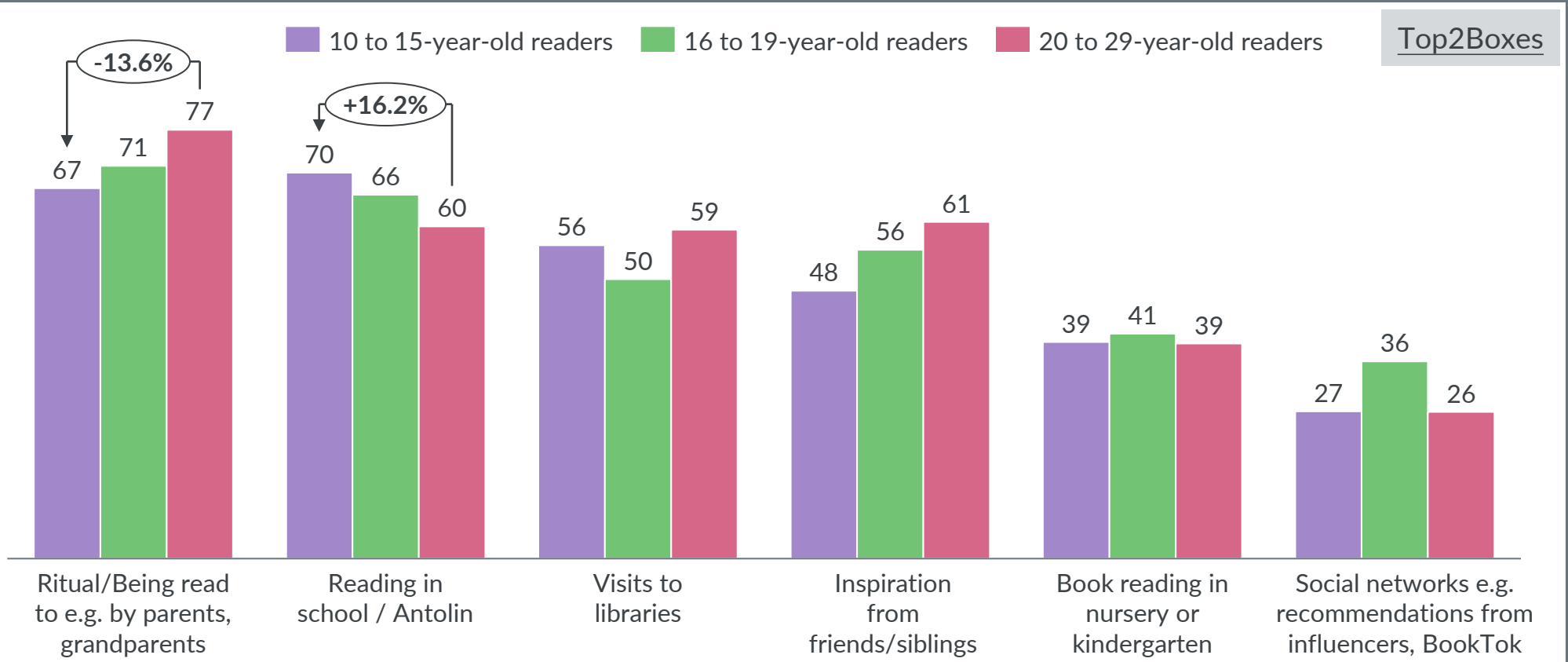
Online survey on reading and information-related behaviour of their children



The Beginning of Reading Books

Overview of Readers | Start of Independent Reading

The home, school and libraries have a major influence on the start of independent reading
 Time lag: young people are more likely to have their first contact with books at school



Question 1.b: Please state what made you start reading books. | Basis: 10 to 15-year-olds: n= 434; 16 to 19-year-olds: n= 184; 20 to 29-year-olds: n=204; 30+ year-olds: not asked | Scale: 1 = 'strongly disagree' and 4 = 'strongly agree' | Top2Boxes: 3 + 4 | Information in %

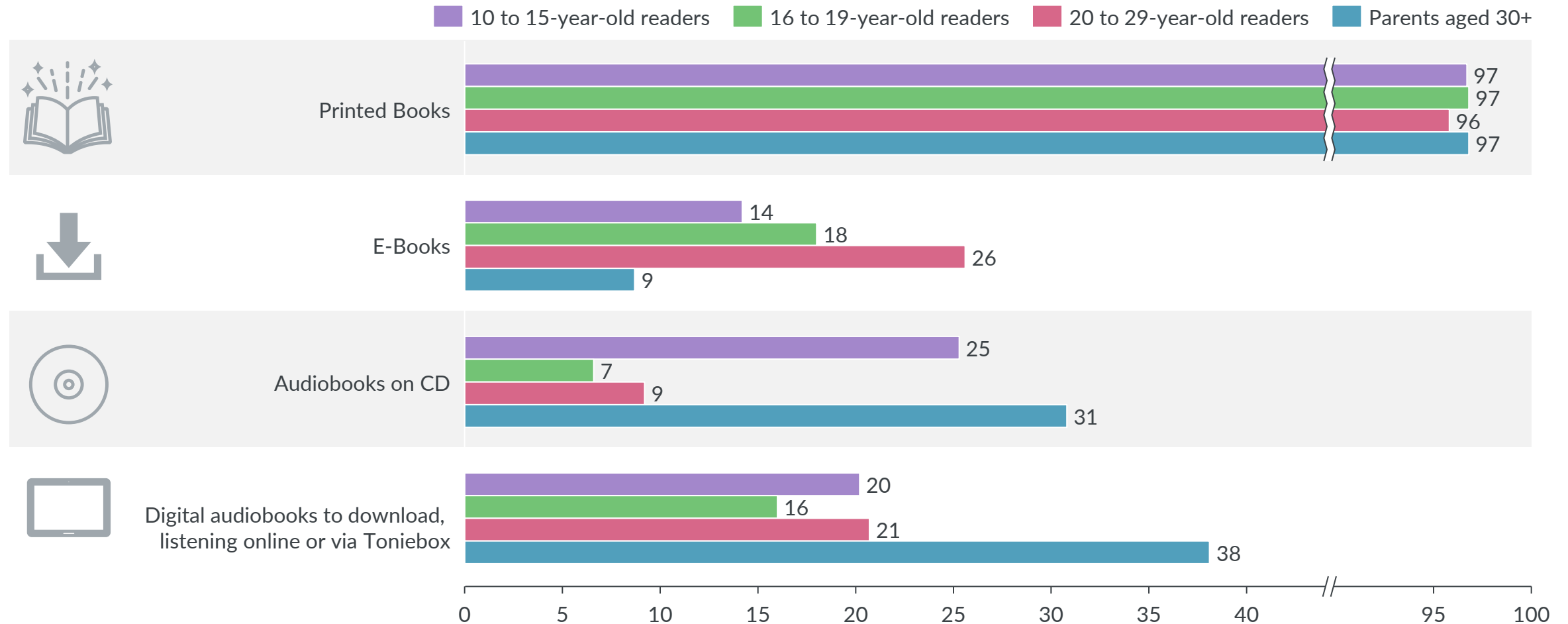


Format Preferences

Target Groups | Format Preferences

Printed books are by far the most common medium

Digital audiobooks / Audiobooks on CD are used by mostly younger children of pre-reading age



Question 1.a: What book formats do you use (for children, young people or young adults)?

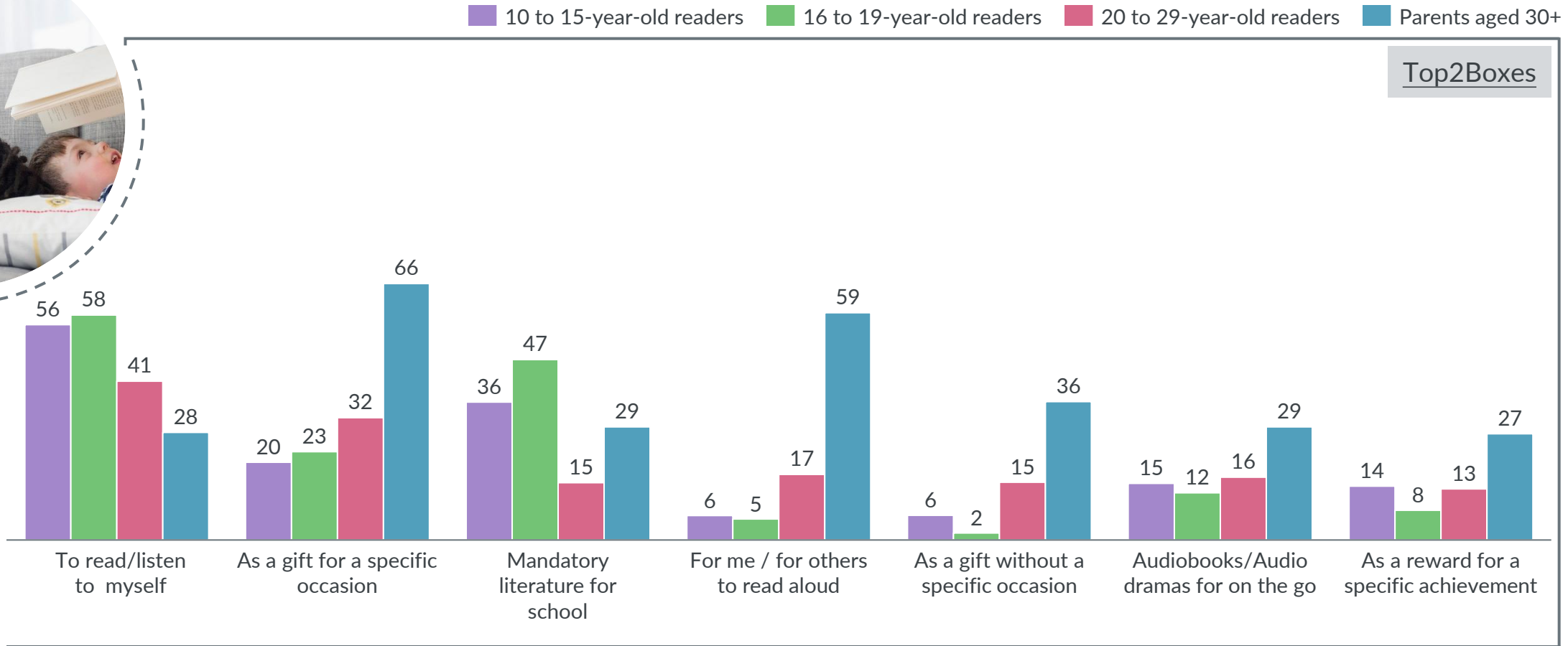
Basis: 10 to 15-year-olds: n=434; 16 to 19-year-olds: n=184; 20 to 29-year-olds: n=204; 30+ year-olds: n=546 | Information in %



Purchase Occasions & Purposes

Target Groups | Purpose of Purchasing Books

56% of the youngest target group (also) buy books for children, teenagers or young adults themselves
 28% of parents also buy books in these categories for their own use.

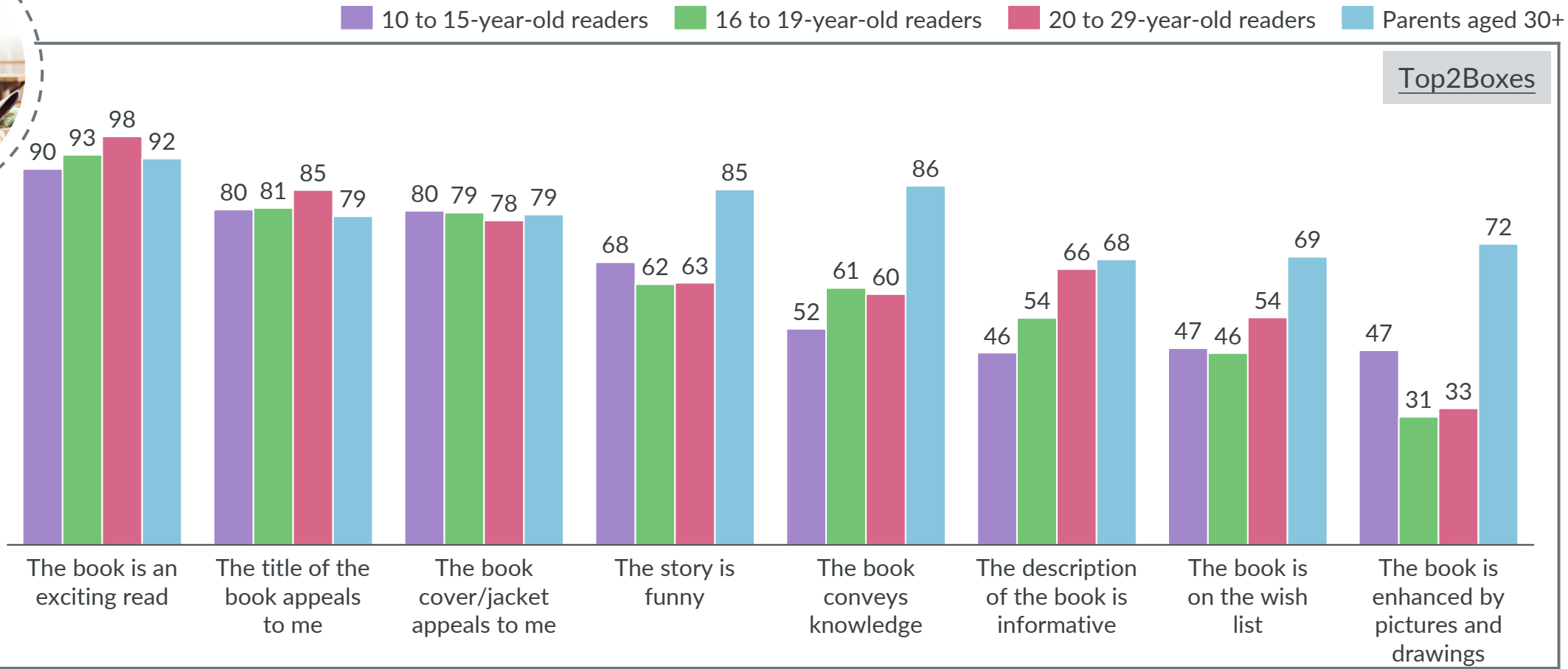




Selecting a Book

Target Groups | Most Important Aspects When Selecting a Book

Few differences in the top criteria for the age group between 10 and 29 years of age
 Parents prioritise knowledge transfer and funny stories when selecting books



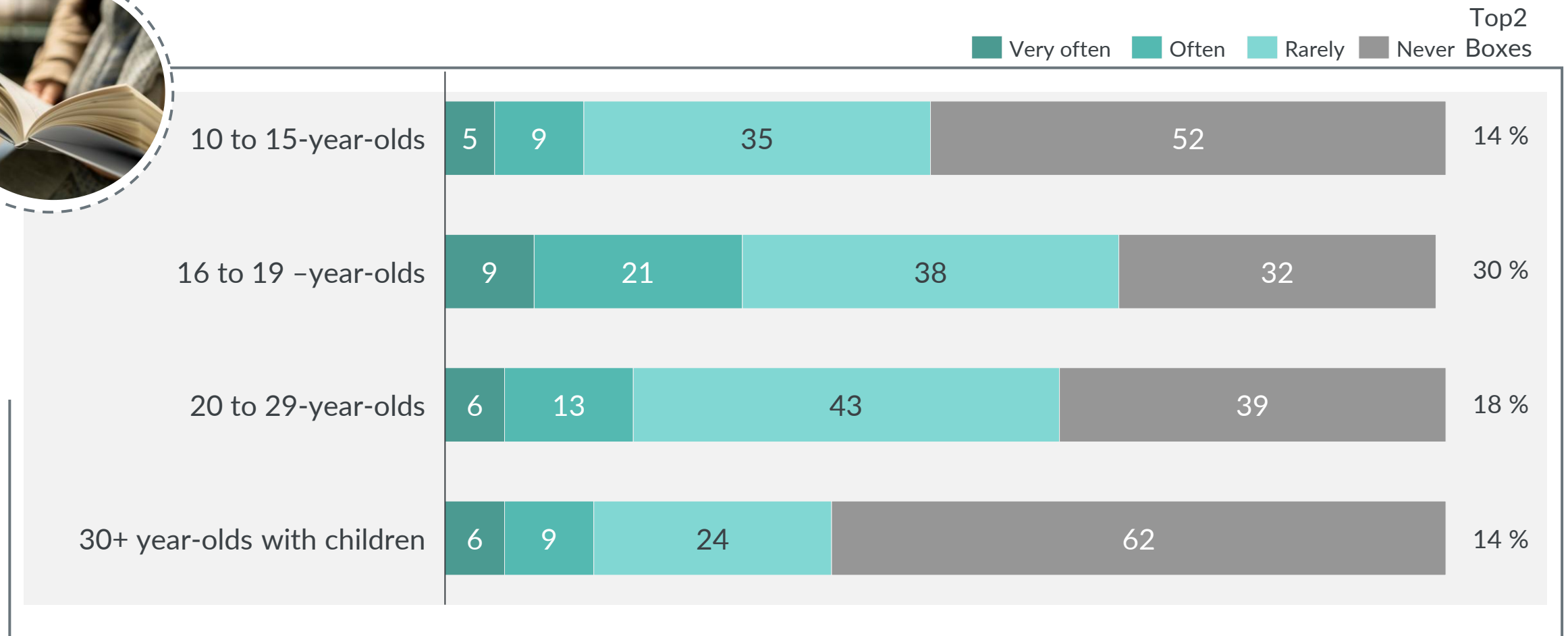
Question 3: How important are the following aspects for you when choosing a book (for children and teenagers)? | Basis: 10 to 15-year-olds: n= 434; 16 to 19-year-olds: n= 184; 20 to 29-year-olds: n= 204; 30+ year-olds: n=546 | Scale: 1 = 'not important at all' and 4 = 'very important' | Top2Boxes: 3 + 4 | Information in %



Reading in Original Language

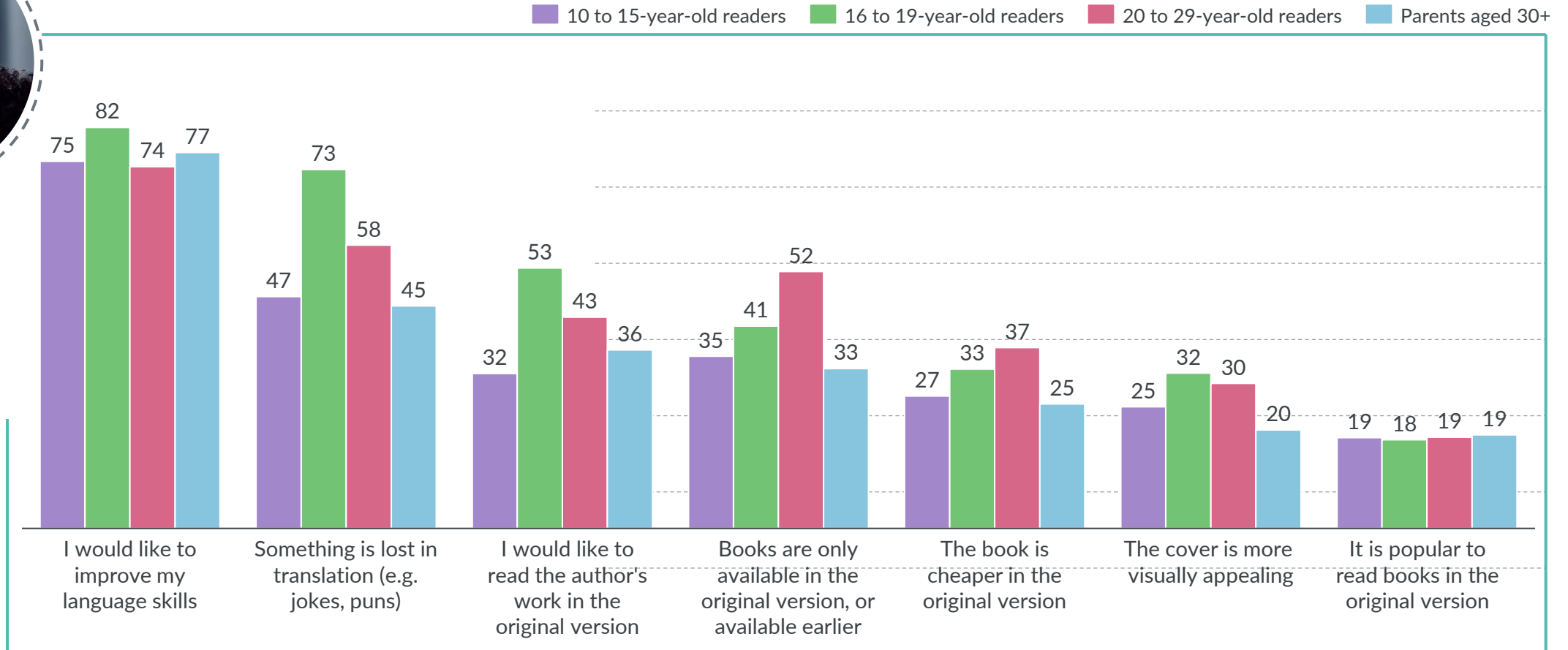
Overview | Frequency of Reading in Original Language

30 % of 16 to 19-year-old readers (very) often read books in their original language



Overview | Reasons for Reading in Original Language

Improving language skills is the main reason for reading in original language



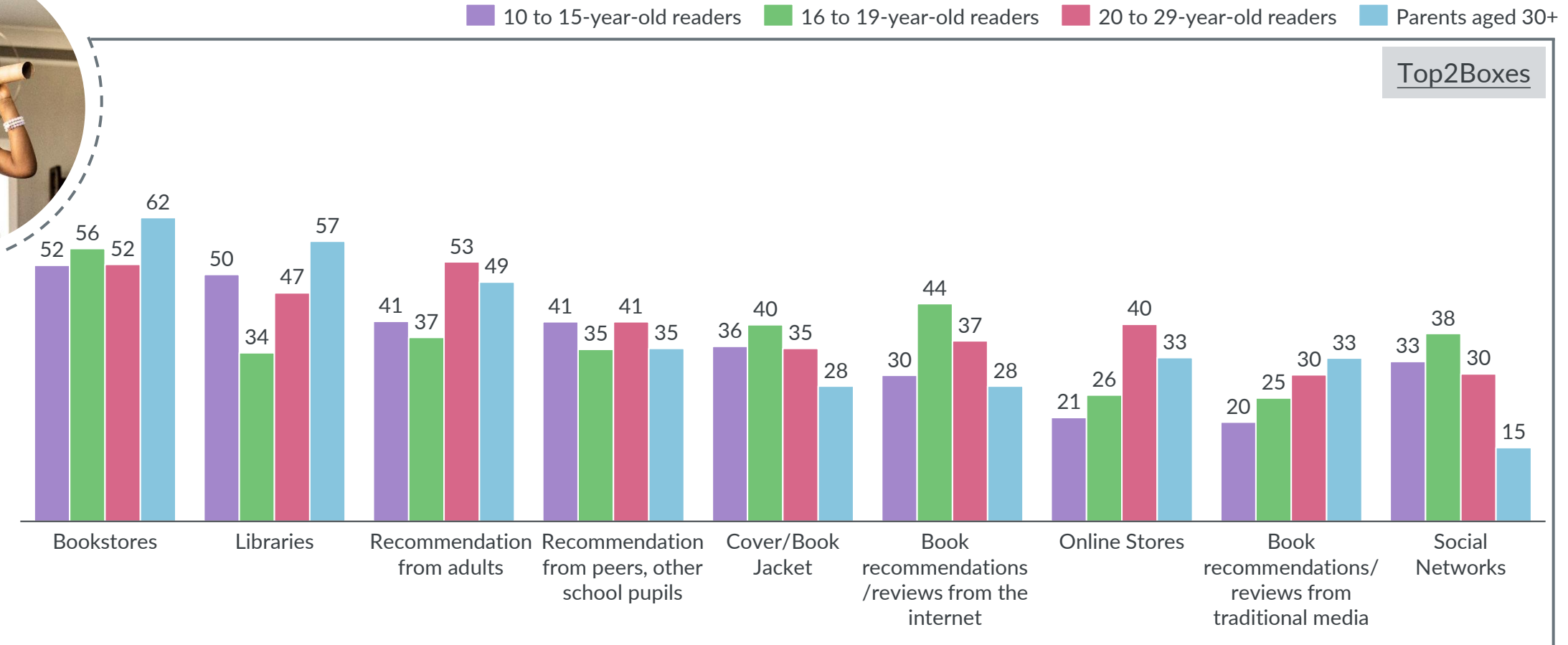
Question 5: If you at least occasionally read books in the original language (question 4), how important are the following aspects for selecting a book in the original language? | Basis: 10 to 15-year-olds: n= 223; 16 to 19-year-olds: n= 119; 20 to 29-year-olds: n= 122; 30+ year-olds: n= 203 | Scale: 1 = 'not important at all' and 4 = 'very important' | | Top2Boxes: 3 + 4 | Information in %



Touch Points when Selecting Books

Target Groups | Top Touch Points

Bookstores play an important role in helping readers discover books, across all target groups



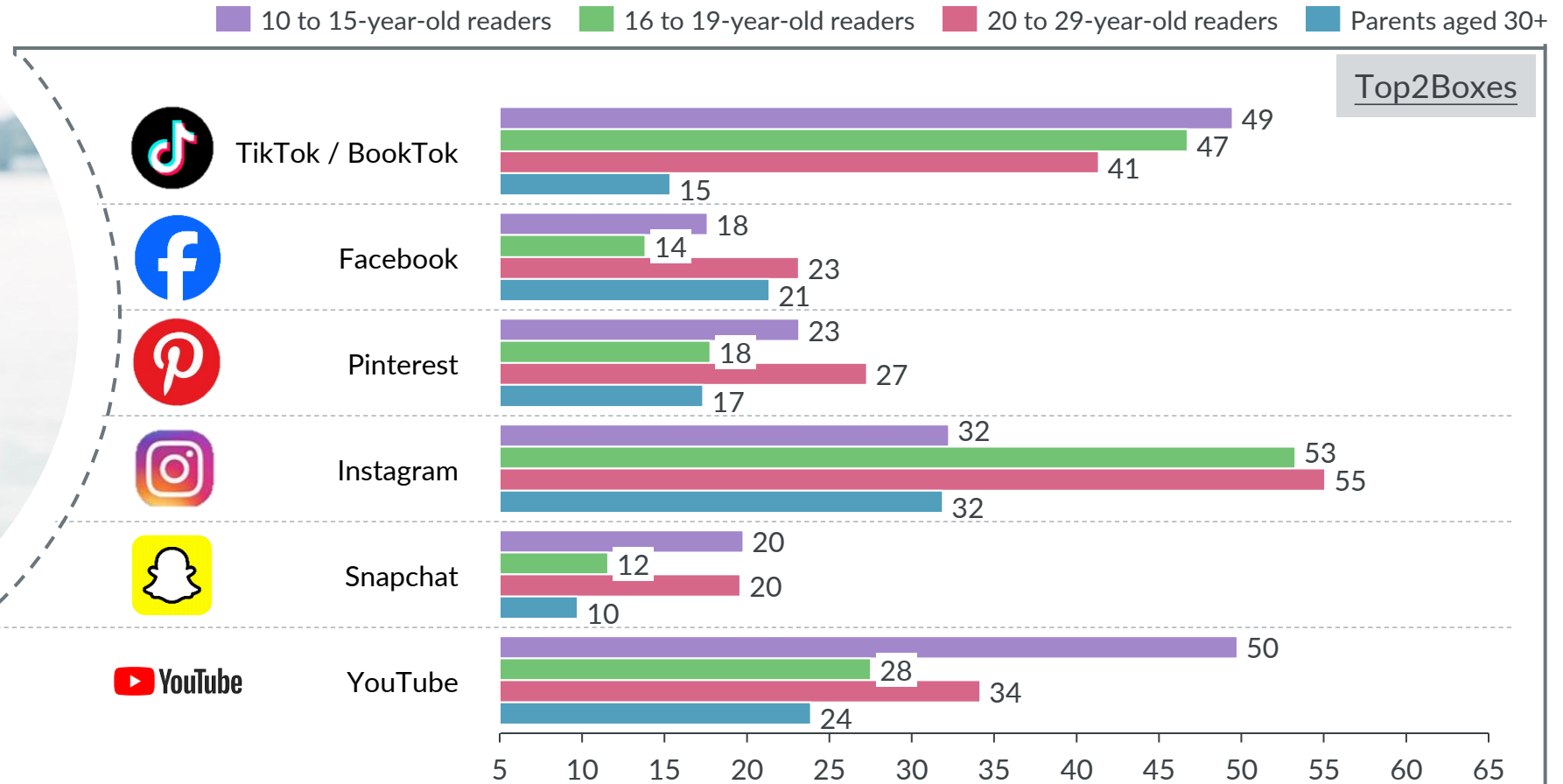
Question 6: How do you usually become aware of books (for children and teenagers)? | Basis: 10 to 15-year-olds: n= 434; 16 to 19-year-olds: n= 184; 20- to 29-year-olds: n= 204; 30+-year-olds: n= 546 | Scale: 1 = 'never' and 4 = 'very often' | Top2Boxes: 3 + 4 | Information in % (excl. 'no answer')



Deep Dive: Social Networks as a Source of Information for Books

Target Groups | Social Networks as a Source of Information for Books

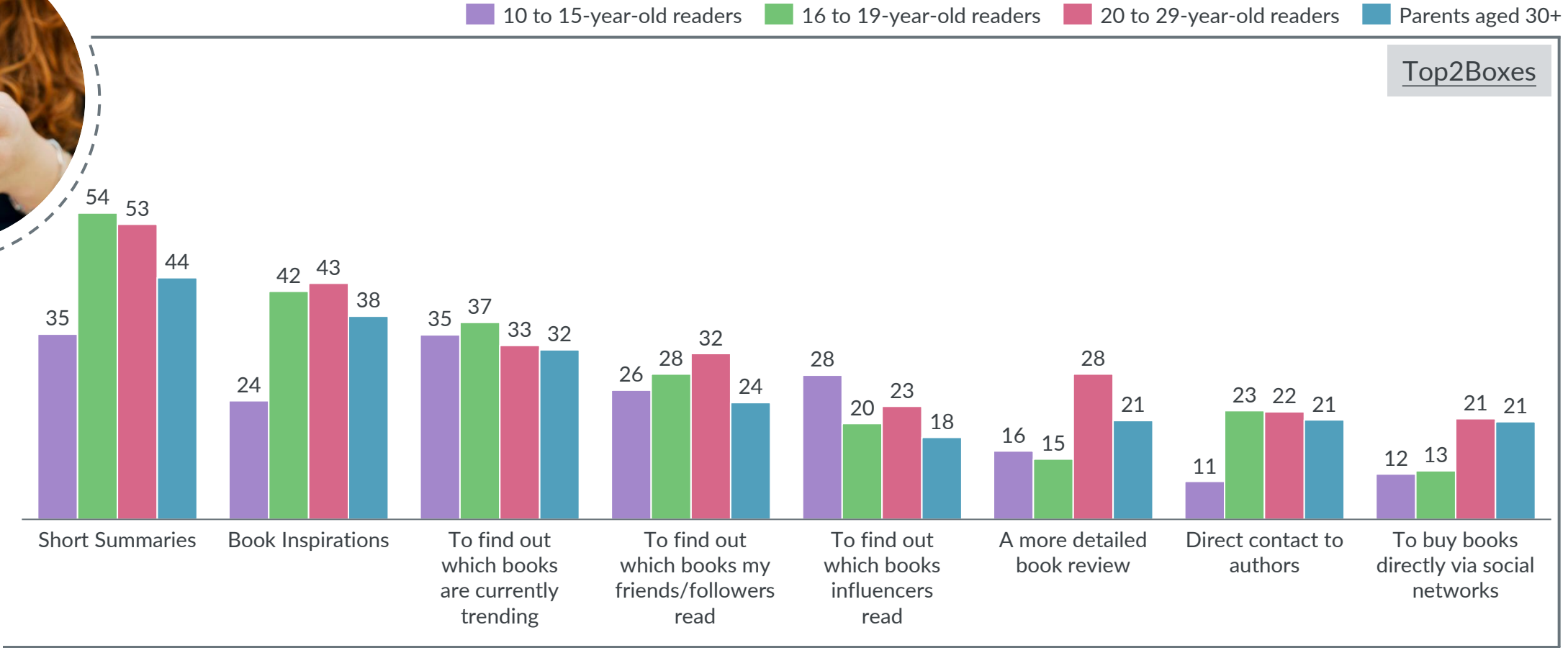
TikTok and YouTube play a significant role for readers aged 10 to 15. Instagram is number 1 for readers aged 16 to 29. Parents rarely look for books for children on social media



Question 7: How important are the following social networks to you as a source of information when it comes to books (for children and teenagers)? | Basis: 10 to 15-year-olds: n= 256; 16 to 19-year-olds: n= 112; 20 to 29-year-olds: n=113; 30+ year-olds: 204 | Scale: 1 = 'not important at all' and 4 = 'very important' | Top2Boxes: 3 + 4 | Information in %

Target Groups | Purpose of Use: Social Networks

Book summaries are most important on social networks for all age groups



Question 8: Please indicate how important the following aspects of social networks are to you in relation to books (for children and teenagers). Basis: 10 to 15-year-olds: n= 256; 16 to 19-year-olds: n= 112; 20 to 29-year-olds: n= 113; 30+ year-olds: n= 204 Scale: 1 = 'not important at all' and 4 = 'very important' | Top2Boxes: 3 + 4 | Information in %



General Information Sources and the Significance of Books

10 to 15-Year-Old Readers | Information Sources & Significance of Books I

One fifth use books on love and sexuality as well as the topic of self-development



10 to 15-year-old readers

 For this topic, books are relevant for at least 20% of readers



| | | Information Sources Used | | | | | |
|---------------|---------------------------------|--------------------------|----------------|-----------------------|-----------------------|-----------------|----------------------------|
| | | Books | TV / Streaming | Journals / Newspapers | Online Search Engines | Social Networks | Personal Contact to Others |
| Entertainment | Gaming | 6 | 16 | 4 | 28 | 62 | 45 |
| | Films / Series | 5 | 42 | 8 | 25 | 45 | 39 |
| | Superheroes (e.g. Spider-Man) | 10 | 34 | 11 | 25 | 43 | 27 |
| | Brands (e.g. LEGO) | 10 | 14 | 17 | 36 | 37 | 33 |
| Lifestyle | Fashion / Make-up | 5 | 8 | 13 | 23 | 67 | 35 |
| | Celebrities / Influencers | 2 | 9 | 9 | 20 | 77 | 20 |
| | Life Hacks | 8 | 6 | 6 | 19 | 82 | 13 |
| My Life | Love & Sexuality (incl. LGBTQ+) | 20 | 5 | 6 | 31 | 44 | 44 |
| | Friendship | 14 | 3 | 2 | 10 | 28 | 72 |
| | Self-Development | 20 | 3 | 6 | 20 | 33 | 59 |

Question 11a: Which of the following sources do you use to inform yourself about the following topics?
 Basis: 10 to 15-year-olds: n= 434, excl. none of these sources of information used | Information in %

10 to 15-Year-Old Readers | Information Sources & Significance of Books II

One third use books for cooking/baking, around a quarter for topics from politics and society



10 to 15-year-old readers

 For this topic, books are relevant for at least 20% of readers



Information Sources Used

| | Books | TV / Streaming | Journals / Newspapers | Online Search Engines | Social Networks | Personal Contact to Others | |
|------------------------------------|--|----------------|-----------------------|-----------------------|-----------------|----------------------------|----|
| Hobbies | Crafts | 24 | 4 | 11 | 31 | 50 | 25 |
| | Cooking, Baking | 33 | 6 | 13 | 34 | 44 | 29 |
| | Sewing | 23 | 1 | 9 | 28 | 38 | 37 |
| | Drawing, Painting, Photography etc. | 22 | 5 | 7 | 34 | 55 | 29 |
| | Sport | 11 | 17 | 7 | 25 | 52 | 40 |
| My Environment / Areas of Interest | Nature, Climate Change, Sustainability | 24 | 21 | 12 | 35 | 41 | 35 |
| | Experiments, Natural Sciences | 28 | 12 | 8 | 35 | 38 | 21 |
| | History, Politics, Geography | 29 | 18 | 12 | 43 | 31 | 27 |
| | Foreign Countries & Cultures | 23 | 19 | 7 | 42 | 39 | 29 |
| | Art, Philosophy | 21 | 8 | 10 | 41 | 41 | 28 |

Question 11a: Which of the following sources do you use to inform yourself about the following topics?
Basis: 10 to 15-year-olds: n= 434, excl. none of these sources of information used | Information in %

16 to 19-Year-Old Readers | Information Sources & Significance of Books I

Almost a quarter read books on self-development



16 to 19-year-old readers

 For this topic, books are relevant for at least 20% of readers



| | | Information Sources Used | | | | | |
|---------------|---------------------------------|--------------------------|----------------|----------------------|-----------------------|-----------------|----------------------------|
| | | Books | TV / Streaming | Journal / Newspapers | Online Search Engines | Social Networks | Personal Contact to Others |
| Entertainment | Gaming | 3 | 18 | 8 | 45 | 68 | 48 |
| | Films / Series | 2 | 46 | 9 | 32 | 57 | 46 |
| | Superheroes (e.g. Spider-Man) | 13 | 37 | 4 | 38 | 43 | 34 |
| | Brands (e.g. LEGO) | 1 | 9 | 11 | 62 | 41 | 27 |
| Lifestyle | Fashion / Make-up | 1 | 8 | 4 | 18 | 81 | 46 |
| | Celebrities / Influencers | 0 | 15 | 7 | 20 | 91 | 17 |
| | Life Hacks | 2 | 1 | 3 | 18 | 88 | 18 |
| My Life | Love & Sexuality (incl. LGBTQ+) | 19 | 7 | 8 | 32 | 66 | 52 |
| | Friendship | 15 | 2 | 2 | 8 | 43 | 76 |
| | Self-Development | 24 | 4 | 3 | 20 | 59 | 59 |

16 to 19-Year-Old Readers | Information Sources & Significance of Books II

In addition to hobbies, books are also relevant for scientific / historical topics



16 to 19-year-old readers

 For this topic, books are relevant for at least 20% of readers



Information Sources Used

| | Books | TV / Streaming | Journals / Newspapers | Online Search Engines | Social Networks | Personal Contact to Others | |
|--------------------------------------|--|----------------|-----------------------|-----------------------|-----------------|----------------------------|----|
| Hobbies | Crafts | 21 | 7 | 15 | 36 | 74 | 34 |
| | Cooking, Baking | 42 | 4 | 13 | 36 | 65 | 33 |
| | Sewing | 24 | 5 | 20 | 44 | 49 | 32 |
| | Knitting, Sewing, Painting, Photography etc. | 25 | 5 | 10 | 37 | 74 | 33 |
| | Sport | 7 | 22 | 9 | 40 | 70 | 45 |
| My Environment/ Areas of Interest | Nature, Climate Change, Sustainability | 23 | 21 | 20 | 46 | 66 | 39 |
| | Experiments, Natural Sciences | 32 | 17 | 14 | 48 | 43 | 30 |
| | History, Politics, Geography | 28 | 21 | 16 | 52 | 57 | 31 |
| | Foreign Countries & Cultures | 12 | 20 | 11 | 46 | 61 | 28 |
| | Art, Philosophy | 21 | 12 | 14 | 47 | 53 | 31 |

20 to 29-Year-Old Readers | Information Sources & Significance of Books I

29% of 20 to 29-year-old readers read books on self-development



20 to 29-year-old readers

 For this topic, books are relevant for at least 20% of readers



| | | Information Sources Used | | | | | |
|---------------|---------------------------------|--------------------------|----------------|-----------------------|-----------------------|-----------------|----------------------------|
| | | Books | TV / Streaming | Journals / Newspapers | Online Search Engines | Social Networks | Personal Contact to Others |
| Entertainment | Gaming | 9 | 19 | 10 | 39 | 54 | 54 |
| | Films / Series | 9 | 51 | 12 | 36 | 48 | 49 |
| | Superheroes (e.g. Spider-Man) | 11 | 46 | 7 | 29 | 33 | 34 |
| | Brands (e.g. LEGO) | 5 | 13 | 13 | 61 | 28 | 31 |
| Lifestyle | Fashion / Make-up | 2 | 16 | 18 | 29 | 57 | 33 |
| | Celebrities / Influencers | 2 | 15 | 6 | 28 | 76 | 16 |
| | Life Hacks | 7 | 9 | 7 | 34 | 77 | 18 |
| My Life | Love & Sexuality (incl. LGBTQ+) | 24 | 13 | 10 | 44 | 42 | 54 |
| | Friendship | 19 | 10 | 8 | 19 | 39 | 66 |
| | Self-Development | 29 | 11 | 11 | 32 | 36 | 54 |

20 to 29-Year-Old Readers | Information Sources & Significance of Books II

Books on cooking and baking are very popular, but also on subjects such as history and culture



20 to 29-year-old readers

For this topic, books are relevant for at least 20% of readers



| | | Information Sources Used | | | | | |
|------------------------------------|--|--------------------------|----------------|-----------------------|-----------------------|-----------------|----------------------------|
| | | Books | TV / Streaming | Journals / Newspapers | Online Search Engines | Social Networks | Personal Contact to Others |
| Hobbies | Crafts | 24 | 5 | 16 | 46 | 59 | 39 |
| | Cooking, Baking | 40 | 5 | 13 | 55 | 48 | 35 |
| | Sewing | 27 | 0 | 10 | 38 | 44 | 53 |
| | Drawing, Painting, Photography etc. | 27 | 10 | 13 | 47 | 54 | 37 |
| | Sport | 12 | 20 | 15 | 36 | 57 | 44 |
| My Environment / Areas of Interest | Nature, Climate Change, Sustainability | 21 | 21 | 18 | 48 | 43 | 33 |
| | Experiments, Natural Sciences | 29 | 22 | 12 | 51 | 28 | 20 |
| | History, Politics, Geography | 33 | 28 | 17 | 52 | 35 | 28 |
| | Foreign Countries & Cultures | 33 | 26 | 19 | 52 | 44 | 31 |
| | Art, Philosophy | 27 | 23 | 13 | 42 | 32 | 31 |

How young people find and buy books today



**Börsenverein des
Deutschen Buchhandels** 

