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


- **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).

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; 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
Estimated sales

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

- Sales volume: +1.7%
- Revenue: +4.1%

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

- Retail bookshops (excluding e-commerce): €4.27 billion (-0.7%)
- Publishers’ direct sales: €1.92 billion (-1.2%)
- Internet book trade: €1.78 billion (+4.0%)
- Mail order book trade: €0.11 billion (-11.3%)
- Book clubs: €0.04 billion (+37.8%)
- Other sales outlets: €0.89 billion (0.0%)
- Department stores: €0.12 billion (-5.9%)

Total revenue: €9.134 billion (±0.0%)

Source: Börsenverein des Deutschen Buchhandels
Market share by product category in 2018 (changes compared to previous year)

- Fiction: 31.5% (-0.9%)
- Children's books and young adult fiction: 16.6% (+3.2%)
- Self-help books: 14.0% (-1.2%)
- School books and learning: 11.0% (+0.2%)
- Non-fiction: 10.6% (+5.5%)
- Travel: 5.7% (-3.2%)
- Humanities, art, music: 4.4% (-4.4%)
- Natural sciences, medicine, computer science, engineering: 3.6% (-4.7%)
- Social sciences, law, economics: 2.6% (+2.2%)

Source: Media Control
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
Book trade: production

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

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

* Change in level of sales as compared to previous year
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.

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
E-books

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

- 2010: 0.7
- 2012: 1.0
- 2014: 2.4
- 2016: 3.9
- 2018: 3.6

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

- 2010: 1.0%
- 2012: 1.5%
- 2014: 5.0%
- 2016: 5.7%
- 2018: 5.3%

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

Average intensity of e-book purchases per buyer per 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
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