

Summary of the study:

Buyers and readers of books 2015. Profiles, motives, attitudes

Research objectives and methods

The study entitled 'Buyers and readers of books 2015. Profiles, motives, attitudes' (October 2015) is the latest comprehensive survey (after 2005 and 2008) on this segment in Germany. It was conducted by the Gesellschaft für Konsumforschung (GfK) and SINUS Markt- und Sozialforschung GmbH on behalf of the German Publishers and Booksellers Association (*Börsenverein des Deutschen Buchhandels e.V.*).

As in the case of the predecessor studies, the data on purchase behaviour stems from the GfK Consumer Panel Media*Scope book with a total of 25,000 people. The Panel Media*Scope book is a quota sample and is representative of Germany's resident population from the age of 10. The consumer survey on the motives and attitudes that drive buyers and readers of books is based on interviews with 10,000 individuals within this panel. Furthermore, all the research data was analysed according to the Sinus-Milieus and the differences between them. 'Book types' were then formed, with the reader and buyer types being placed in relation to each other.

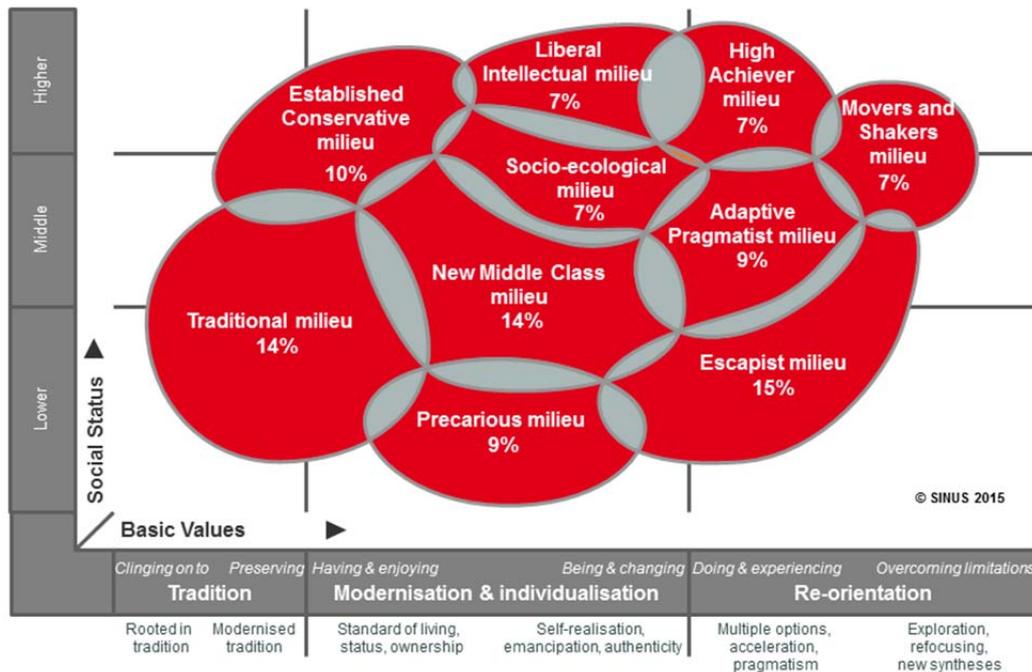
The aim of the study is once more to analyse the profiles, motives, attitudes and preferences of book buyers and readers, and identify any changes compared to the last study as well as detect new developments (also with regard to the growing online book trade and e-book market).

The sociocultural perspective was again applied in order to bring the target groups of today and tomorrow into focus. As in the past, this involved integrating the Sinus-Milieu business model, which groups group together likeminded people with similar lifestyles. This means that basic values flow into the analysis, along with everyday attitudes to work, family, leisure, money and consumption. In other words, the Sinus-Milieus bring to the fore the human being and the entire frame of reference for their lifeworld.

If one looks at the following illustration, the higher up the chart a milieu appears, the higher its educational, income and occupational status; the further to the right it extends, the more modern its basic orientation in the socio-cultural sense.

In other words, the horizontal axis ranges from the more traditional key values such as duty, achievement and humility on the left-hand side to post-modern values on the right. The latter notably include flexibility, re-orientation and adaptive navigation, combined with acceptance of a fast-moving world in which uncertainty is a permanent feature. People respond to this uncertainty by making corresponding adjustments to their life scripts.

The Sinus-Milieus® in Germany 2015



Purchase and reading habits

General insights

59 per cent of the German population currently engage in the purchase of books, and 83 per cent read books. This means that more than 8 in 10 people have read at least one book in the past 12 months, while around 6 in 10 have made at least one purchase. Although the proportion of book readers in Germany has declined since 2008, the share of purchasers has remained stable or risen slightly. Although the change in media 'time budgets' seems to impact on readers (fewer people get round to reading a book), this doesn't seem to be affecting purchasers.

The proportion of heavy readers (more than 18 books a year) has remained almost constant over the past seven years. More than 1 in 5 Germans and around 1 in 3 readers read more than 18 books a year. The share of moderate readers (more than 9 books a year) totals 26 per cent. Overall therefore, more than half the readers (58 per cent) read more than 9 books a year.

Given the rapid advance of the media revolution in recent years (and its impact on the time allotted to media), this is good news – when the predecessor study was published in 2008, the iPhone had just

been launched and the everyday relevance of mobile internet for the German population was negligible. Those with an affinity for books remain loyal to the medium, even in our highly digitalised everyday life that allows us to process several media units at once.

Age barely influences people's reading habits at all. The non-reader share is no higher in the younger age cohorts than in the older ones. Only among people over the age of 60 is it 2 per cent higher than the national average (19 vs. 17 per cent overall).

The significance of reading and the access to books are above all a reflection of lifeworlds:

- Members of the Socio-ecological milieu have strong emotional ties with books and find it difficult to imagine life without them. The milieu of the Liberal Intellectuals with their likewise post-material tendencies share values such as tolerance and fairness with the Socio-ecological milieu. Liberal Intellectuals have a similar attitude to reading books as Socio-ecologicals, but with slightly less emotional attachment.
- The Established Conservatives show a disproportionately strong tendency to read general knowledge books and anything that enables them to hold their own in social debate. The High Achievers and Movers & Shakers also see books as a means of broadening their personal horizons, but with the added motivation of outdoing others in terms of knowledge.
- The milieus with a postmodern orientation (High Achievers, Movers & Shakers, Adaptive Pragmatists and to some extent also the Escapists) claim flexibility and mobility as their key values, and accept that life will always be shaped by imponderables. They are keen to gain fresh perspectives from reading, and reading books represents a conscious decision rather than something learned as a matter of course.
- Books are not pivotal in the lives of the New Middle Class and the Traditionals. The main motives here are entertainment and relaxation. On the whole, the Precarious see less reason to read books.

Who are the book buyers?

The majority of book buyers are female (with a share of 60 per cent). This also goes for the heavy buyers, i.e. people who buy more than 14 books a year (61 per cent). Women buy 1.7 books a year more than men on average, whereas men are more likely to purchase books in the higher price categories.

The proportion of book buyers increases with age. In addition, older people buy more books than younger people (the over-60-year-olds purchase twice as many books as the under-20-year-olds).

The share of book buyers is particularly high in the Socio-ecological milieu.

Retail outlets and expenditure on books

Although slightly fewer books were sold in the public book market (excluding educational/ reference books) during the current survey period (purchase data for 2014) compared to 2008, there has still been a rise in annual per capita book expenditure. This means that book buyers have spent more per book on average. Hence the demand for quality books has not decreased.

It is above all the 50 to 59-year-olds and the over 60s who spend a disproportionately high amount. A comparison between the milieus reveals the Socio-ecologicals as the milieu with the highest inclination to spend money on books. However, the larger Established Conservative milieu is the one with the highest share of all expenditure in the public book market.

The most popular retail outlet for books by a large margin is and will remain the physical book trade. Online shops have indeed become far more important in the past seven years but mainly substitute other retail outlets.

Online buyers are most strongly represented in the 30 to 39 age group, followed by the 20- to 29-year-olds. It is also the case that men spend slightly more in the internet book trade than women, proportionately speaking.

The younger and postmodern milieus in particular (Movers & Shakers, High Achievers, Escapists) spend a relatively high share of their book budget online. In contrast to this, post-material and traditional milieus (especially the Established Conservatives) make a higher percentage of their purchases in the physical book trade.

The number of purchases concluded at physical bookstores is increasing overall: just 1 in 3 people claim that they often leave a bookstore without buying a book (2008: 1 in 2 people).

Purchase behaviour and sources of information

The main contact point for book purchases is the physical retail trade, which thus remains the main location for (successfully) presenting books: 64 per cent of book buyers come across books at bookstores, which they then go on to purchase. Only half as many discover books in online stores, which take third place in this respect. Recommendations from friends and acquaintances form the second most important source of inspiration.

Books are generally bought at the point where they are discovered, i.e. the contact point is also the place of purchase. In the case of the physical book trade, this means that well over a quarter of book buyers purchase a book they discover in a physical store from that store. The figure for internet book stores is 9 per cent. In cases where the contact point is not the place of purchase, the more common scenario is that a book is discovered on the internet and then purchased in a physical bookstore than vice versa.

When it comes to different reference points for navigating the book jungle, people are increasingly doing their own active search for information sources with which to form an opinion. Classic forms of product presentation such as bookstore prospectuses and window displays have decreased in importance as relevant sources of information. The book cover blurb has also become less important, despite remaining the main tool used. Themed tables and recommendations from bookstore staff follow in second and third place.

Reading motives and preferred genres

Reading motives and preferences

The key motives for reading a book have barely changed since 2008: 79 per cent of respondents give entertainment and relaxation as their reasons for reading. They thus view the reading of books in terms of a leisure pursuit and a passion. Gathering information by book reading has dropped in significance since 2008 but still represents the second most important motive. It is followed by general education and further/continuing education (likewise with a downward trend due to partial substitution by online services).

Ever more people say they prefer to read books that aren't too thick. The proportion of those who would rather read books with fewer than 300 pages has almost doubled since 2008.

Preferred formats

The printed book continues to be of high relevance to people in Germany: 45 per cent of all respondents state a wish to read only printed books in future too – this value has increased by 7 percentage points compared with the previous year (2014). The proportion of parallel users who want to read both printed and e-books has decreased by 7 percentage points. The share of those who largely or strictly prefer e-books remains stable (8 per cent). At the moment it seems as if many people will become readers either of paper or of digital books in future.

60 per cent of spending in the public book market goes on hard and soft covers. Only half as much is spent on paperbacks. Audio books and e-books each account for a small share of 4 per cent.

Preferred genres

The most commonly read genre is still fiction/classics/novellas, followed in second place by crime fiction. However, like almost all the other segments in the survey, both genres have lost readership. Nonetheless, the crime novel is shown to enjoy a loyal base of readers comprising people aged from 50 to 59.

The only genre whose reader/user share is not in decline is that of learning media: as became apparent in 2008, they are used by just under 1 in 5 people. Among the 20- to 29-year-olds, we are even seeing an increase in users here of 9 percentage points. Learning media are used particularly in the young post-modern milieus.

All other categories manifest declines in readership. The proportion of heavy readers per genre nonetheless remains largely constant. The decreasing numbers of readers across the genres is essentially down to men's diminishing inclination to read.

Although the under-20s are mainly responsible for the strong decline in readership for children's books and books for young people, there has been no general fall in their share of readers. On the contrary, they have been seen to make up increasing shares of the readership for individual genres (e.g. travel guides and self-help books/cookery books/hobby books). Unlike all other age groups, they manifest a constant share of the readership for fiction. What is more, proportionate spending on books for children and young people among the population up to the age of 19 has more than doubled. One reason for this is that more and more children and young people are buying their books themselves.

In the age cohorts of the under-30s, we are seeing definite growth in the readership share for the genres self-help books/cookery books/hobby books. The publishers appear to be striking a chord with their young readers in this respect.

Core target groups of the book market and recommended action

The findings from the current comprehensive study on book buyers and book readers only become useful when the facts are bundled for specific target groups and translated into recommendations for action. Target groups relevant to the book market can be identified along several dimensions. The focus here is on sociodemographic aspects, segmentation by reader and buyer types, and, most particularly, milieu-specific differentiations. The latter allow holistic means of approaching customers and provide concrete ideas on how to effectively address different lifeworlds.

In its concluding chapter, this study highlights individual target groups that are of relevance to the book market in different ways and differentiated by sales, emotional involvement with books and potential for the future. Future demographic changes are also included, and the study finishes by developing recommendations for the cultivation of existing and future target groups.

The study covers the following topic areas:

- **Reader structures, behaviour and attitudes**
(incl. reading motives, relative importance of books and reading events, preferred genres, and sales channels)
- **Buyer structures, behaviour and attitudes**
(incl. performance figures, preferred genres and formats, reasons for purchase, purchase planning, information behaviour and contact points)
- **Relevance and evaluation of sales channels**
(incl. purchase and non-purchase aspects, online/offline information vs. online/offline purchase, evaluation of additional product ranges)
- **Segmentation**
by Sinus-Milieus and by 'book types (according to frequency of purchase and reading)
- **Core target groups and recommendations**

Distribution details for the study:

'Buyers and readers of books 2015. Profiles, motives, attitudes' is published by the German Publishers and Booksellers Association.

The study is available in German language and printed form only: 209 pages, numerous figures and photos, ring binding.

€ 109 incl. VAT (for Association members), plus postage

€ 329 incl. VAT (for non-members), plus postage

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