

How is the Book Market Faring in 2022/2023? Current Figures and Trends

Annual Business Press Conference

Frankfurt am Main, July 5 2023

The Book Market in Germany

Challenges and Opportunities

CENTRAL DEVELOPMENTS

Post-Pandemic Era: Normalisation, but also Sustainable Developments

Market settles down again, but long-term growth in online trade, less visits to physical bookstores

Audio as an Area of Growth

Audiobooks benefit from download and subscription growth

Low Consumption and Cost Pressure Continue

Decline in turnover, difficult situation for small publishing houses, decline in licences due to global situation

Young Target Group as an Opportunity

Number of book consumers declining, large reading deficits, but 16- to 29-year-olds eager to purchase, partly due to social media



01

The Book Market in 2022

Total Market, Sales Channels, Product Groups, Title Production

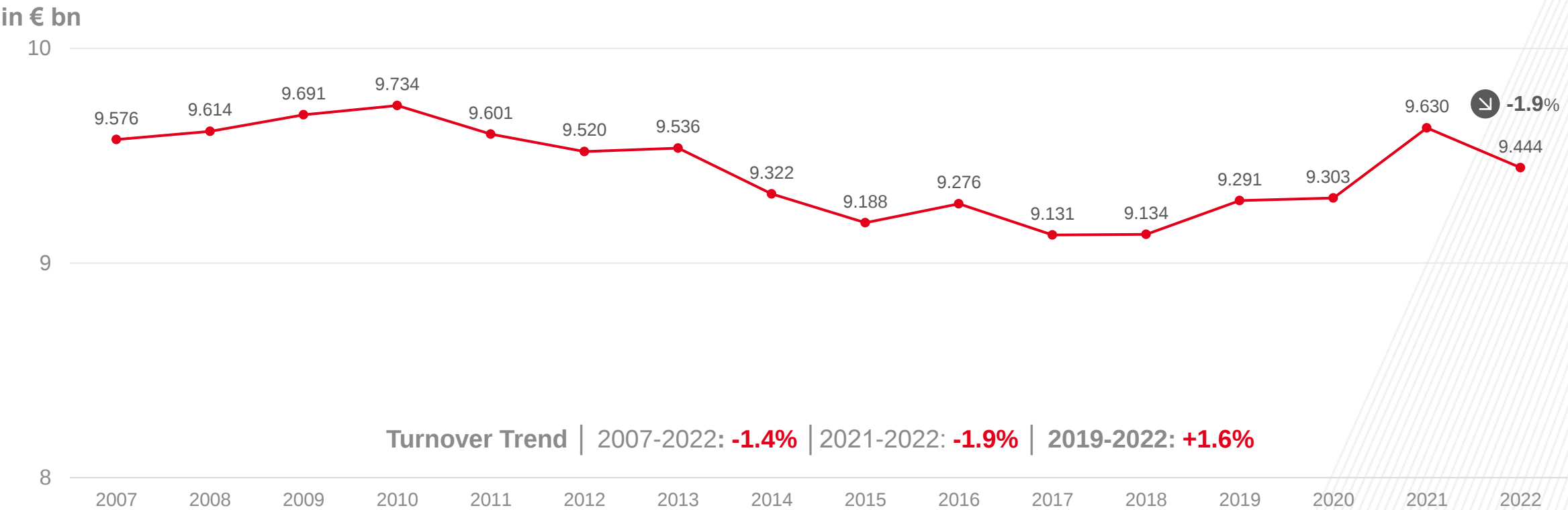


Turnover in the Book Industry 2007-2022

Estimated Turnover

KEY MARKET FIGURES 2022

TURNOVER



Source: Börsenverein des Deutschen Buchhandels

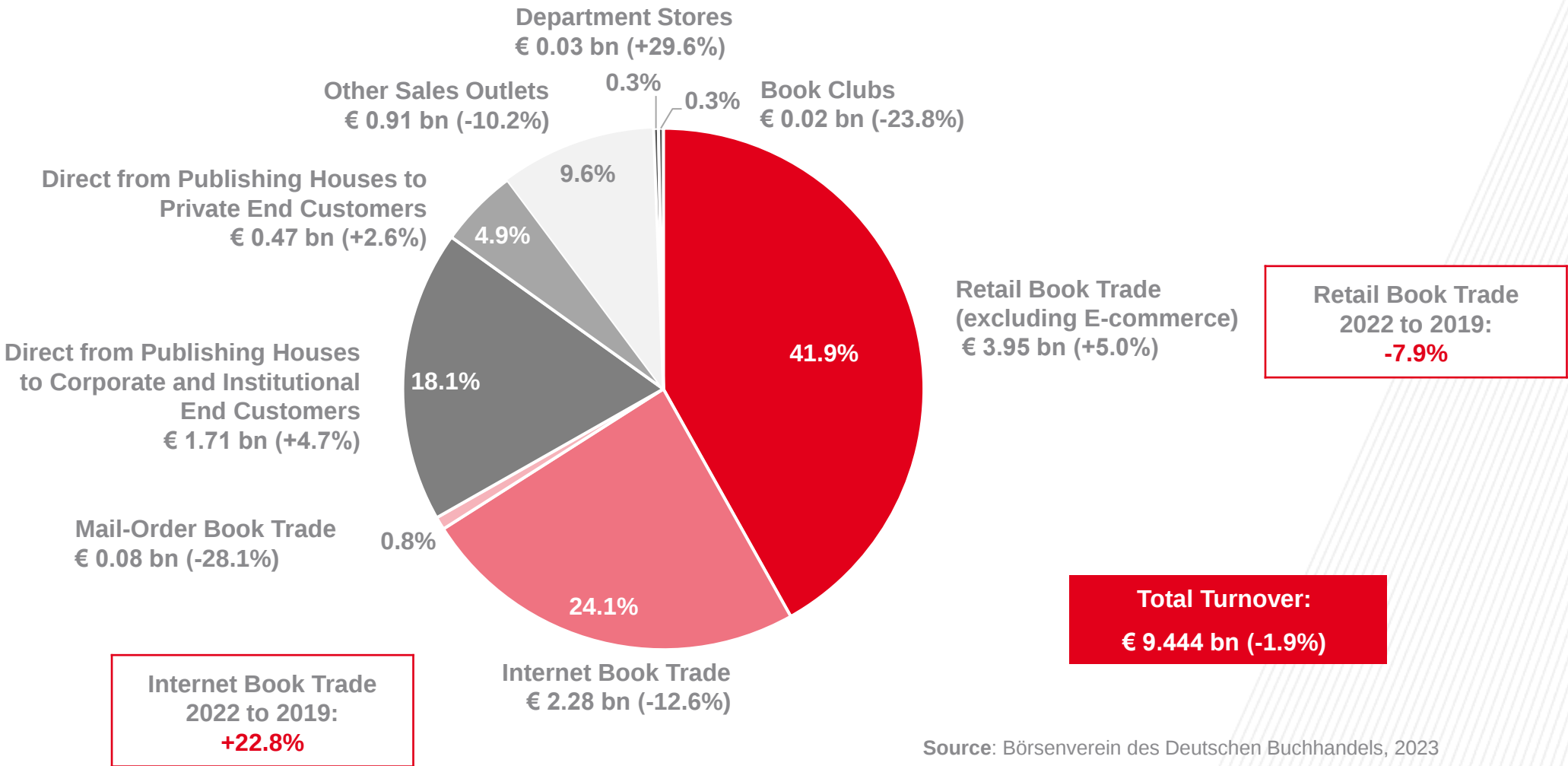


Share of Turnover by Sales Channel 2022

Estimated turnover with development compared to previous year (in brackets)

KEY MARKET FIGURES 2022

SALES CHANNELS



Source: Börsenverein des Deutschen Buchhandels, 2023

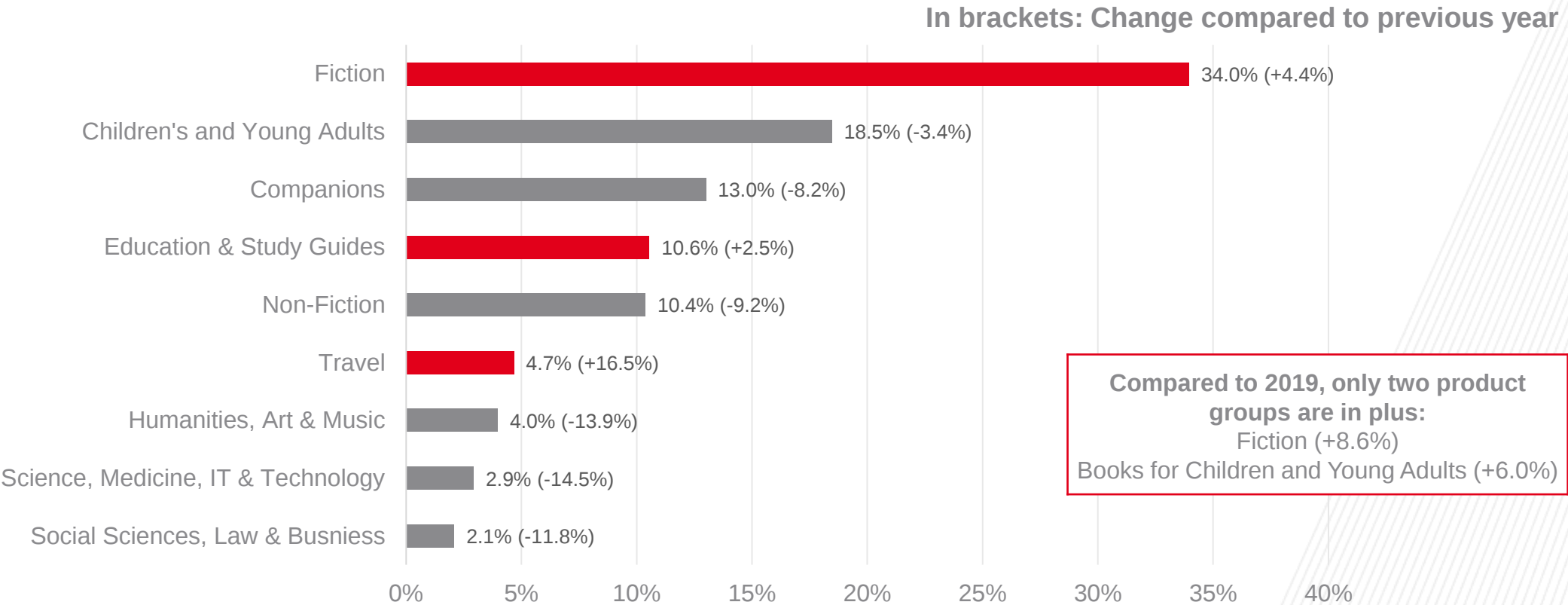


Share of Turnover by Product Groups 2022

Incl. development compared to previous year

KEY MARKET FIGURES 2022

PRODUCT GROUPS



Sales channels: Retail bookstores, train station bookstores, department stores, Electrical goods and drugstores (cash turnover in each case) as well as e-commerce.

Edition forms: Hardcover/softcover, paperback, audiobook (physical)

During the corona-related shop closures in the previous year, the turnover for books ordered by the public from physical sales channels was also taken into account in each case.

Source: Media Control, 2023



Title Production 2022: First Editions, Translations, Licences

Amount and change compared to previous year

KEY MARKET FIGURES 2022

TITLE PRODUCTION

First Editions

64,278 (+0.4%)

- Number of first editions stable compared to the previous year, but at a relatively low level
- Publishers had previously released fewer new titles during the pandemic
- Most important categories: Fiction (share of 18.2%) and books for children and young adults (12.9%)

Translations into German

9,403 (+8.0%)

- Number of translations up again after significant decline during the pandemic
- Share of all new publications: 14.6%, fiction: 25.1%, books for children and young adults: 22.2%, comics/cartoons: 85.9%.
- Main languages: English, Japanese, French

Licensing Abroad

6,655 (-14.4%)

- China and Russia in particular, as the otherwise most important buyers (esp. for titles for children and young adults), are declining.
- China: Decrease from 1,318 to 825 licences
- Russia: Decrease from 676 to 236 licences
- Most important customer countries in 2022: China, Italy, Czech Republic

Sources:

First editions and translations: German National Bibliography, VLB (Calculations: Börsenverein des Deutschen Buchhandels)

Licences: Licence survey, Börsenverein des Deutschen Buchhandels



02

The Book Market 2022

Digital Purchases

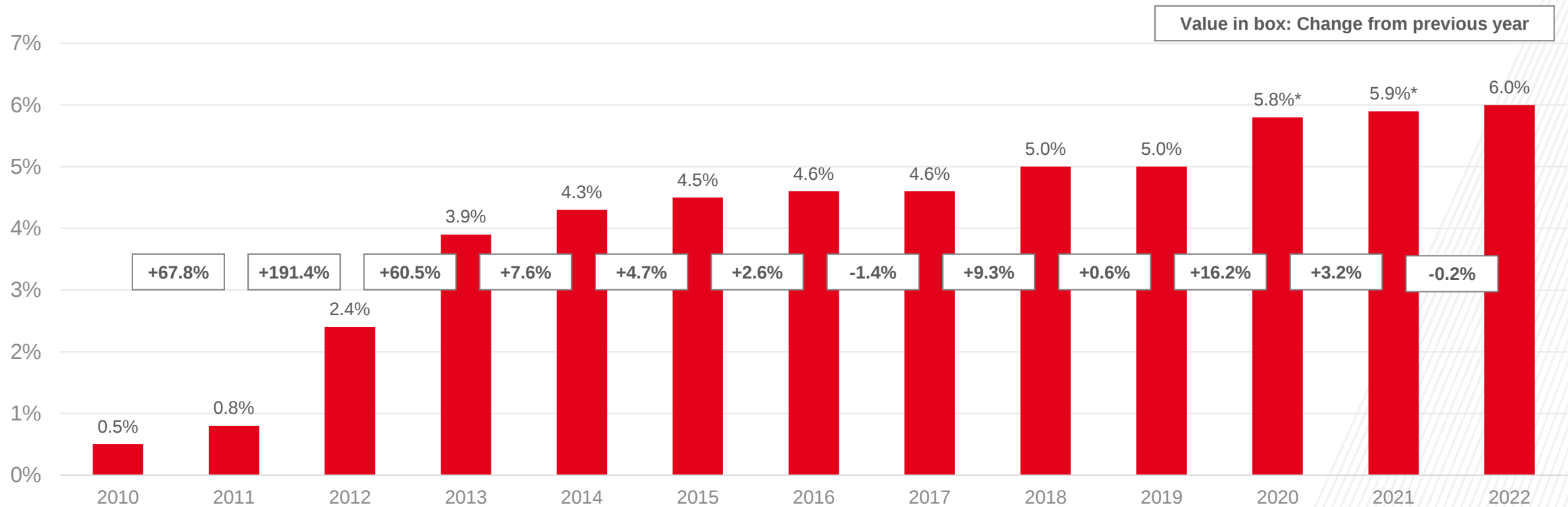


Ebook Development 2010-2022

Share of turnover and change in turnover

KEY MARKET FIGURES 2022

EBOOKS



* Due to a change in the GfK Consumer Panel Media*Scope book, the percentages for 2020 and 2021 differ slightly from previous publications.

Basis: Representative of 66.2 million people (German resident population aged 10 and over),
Excluding textbooks and reference books,
Includes all purchases of individual ebooks from a sales price of 0.49 euros,
Source: GfK Consumer Panel Media*Scope Book



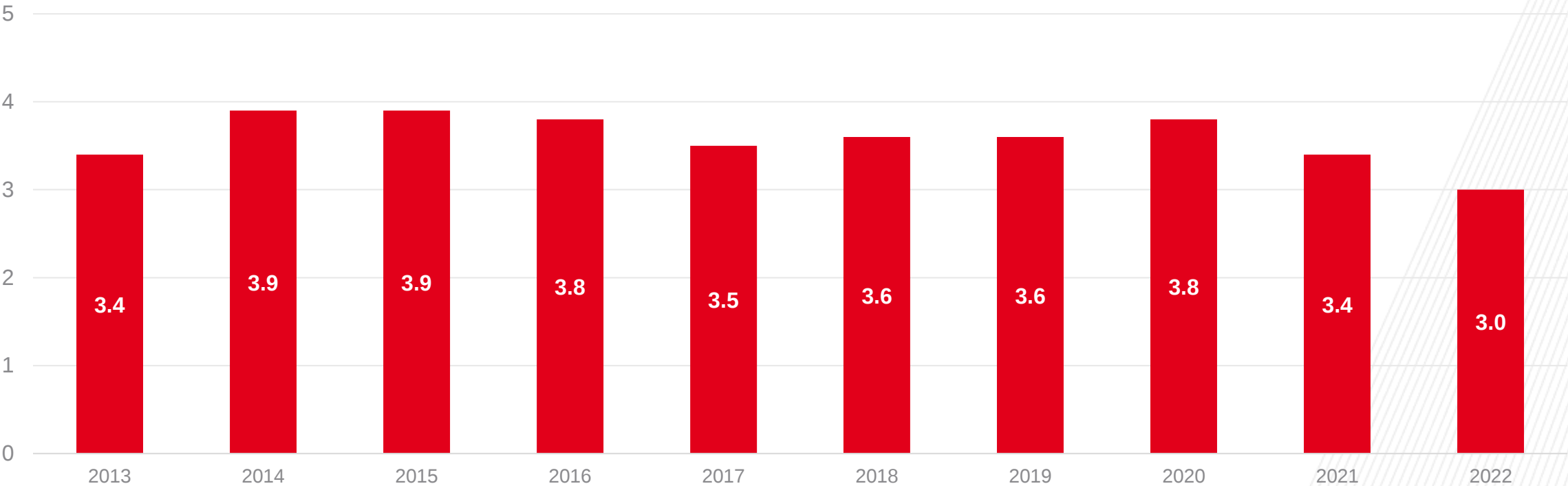
Ebook Consumer Development 2013–2022

Ebook consumers in the general public book market: Figures

KEY MARKET FIGURES 2022

EBOOK CONSUMERS

Number of people in millions



Basis: Representative of 66.2 million people (German resident population aged 10 and over),
Excluding textbooks and reference books, only downloads
Source: GfK Consumer Panel Media*Scope Book



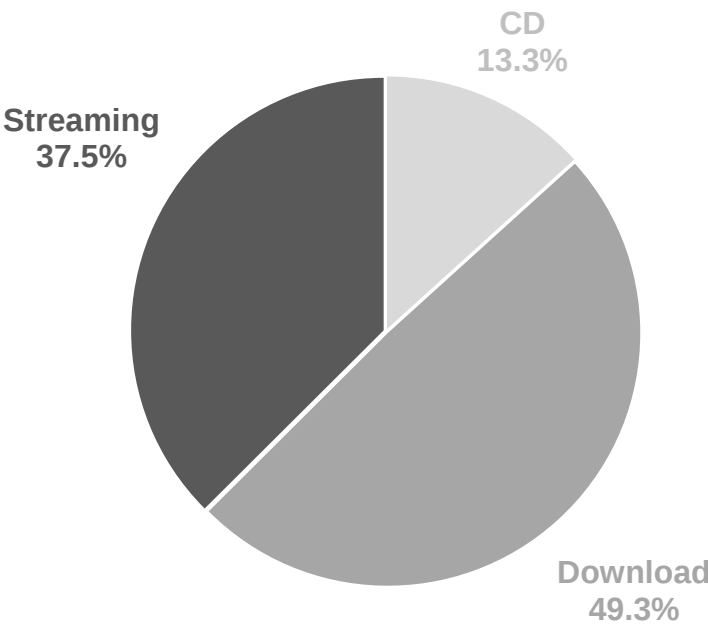
Sales of Audiobooks 2022

Share of turnover and turnover development 2022 to 2021 and compared to 2019

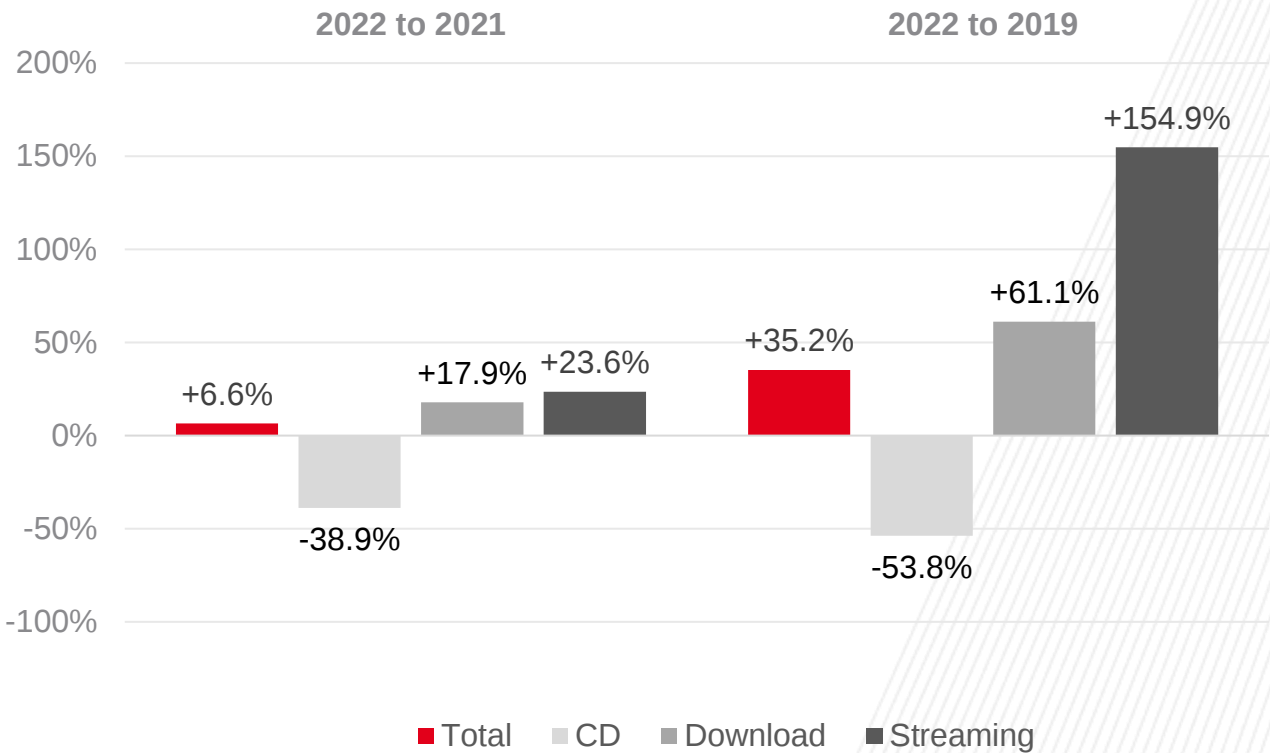
KEY MARKET FIGURES 2022

AUDIOBOOKS

Turnover percentages in the audiobook market



Turnover Development



Basis: Publisher data within the framework of the Media Control Audiobook Compass - a sales survey of German audiobook publishers and extrapolation to the population (**Downloads:** e.g. iTunes, Google Play, audible [counted under downloads, as subscription model is based on individual downloads]), **Subscriptions:** e.g. BookBeat, Nextory, storytel). **Source:** Media Control, 2023



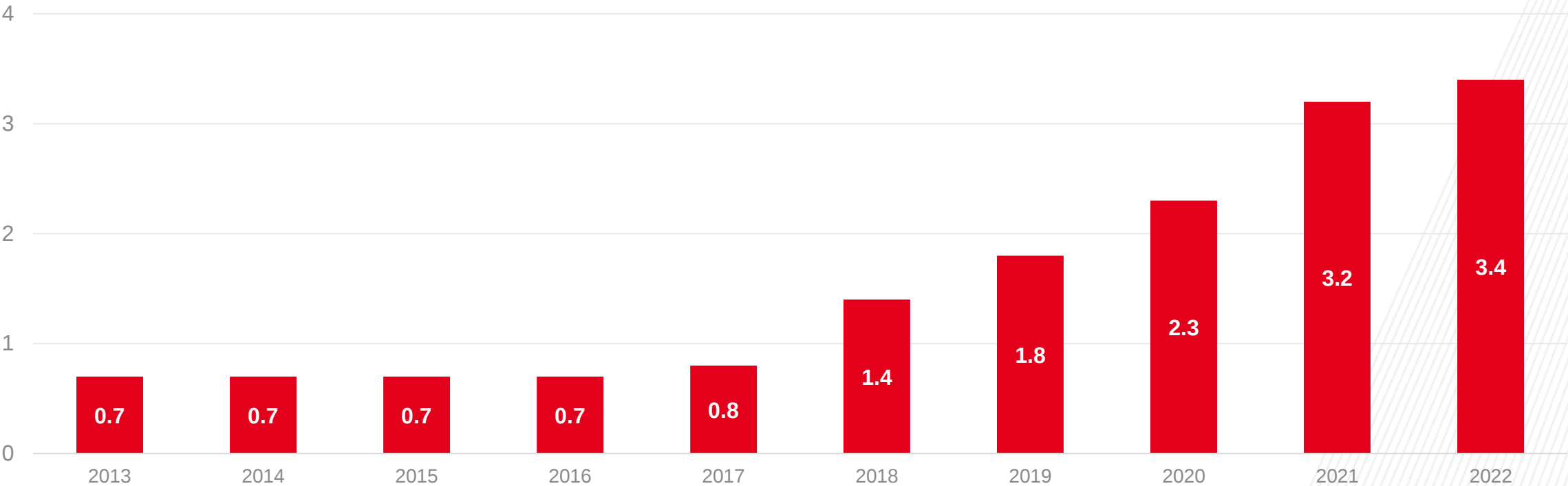
Digital Audiobook Consumers 2013-2022

Digital audiobook consumers in the general public book market: Figures

KEY MARKET FIGURES 2022

DIGITAL AUDIOBOOK CONSUMERS

Number of people in millions



Basis: Representative of 66.2 million people (German resident population aged 10 and over),
Downloads (e.g. iTunes, Google Play, audible [counted under downloads as subscription model is based on individual downloads]) **and subscriptions** (e.g. BookBeat, Nextory, storytel), excl. music streaming flat rates.
Source: GfK Consumer Panel Media*Scope Book



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The Book Market 2022

Consumers



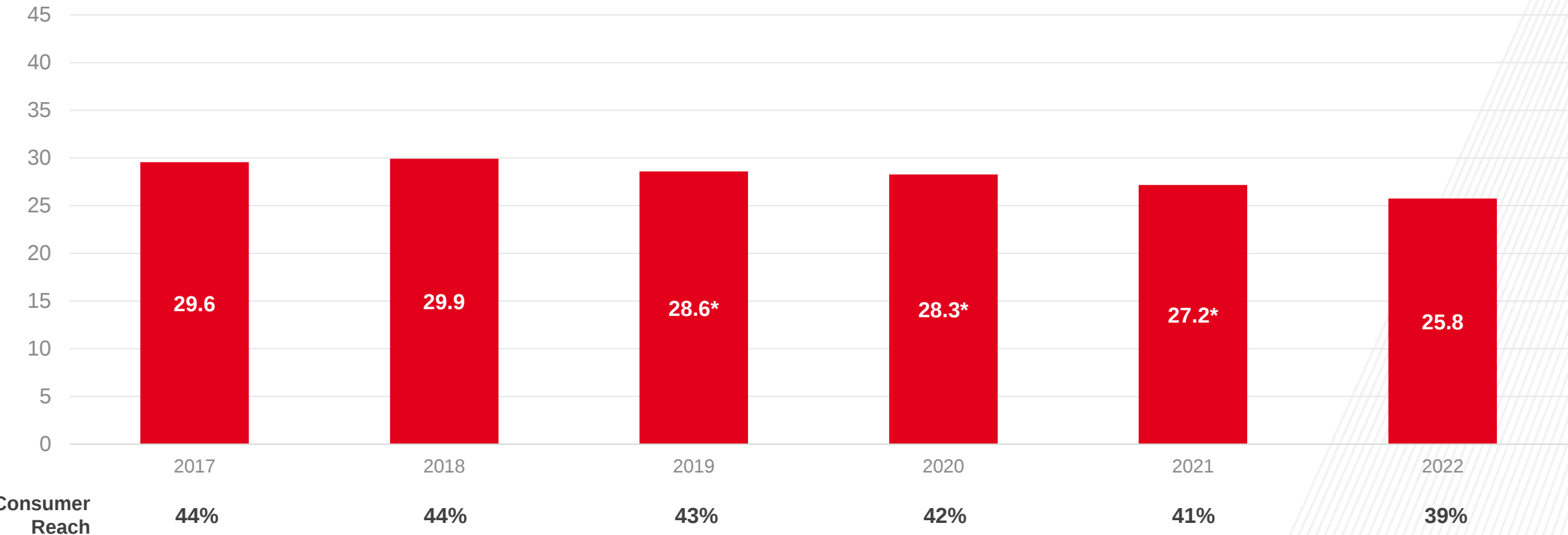
Consumer Development 2017–2022

Book consumers in the general public book market: Amount and reach

KEY MARKET FIGURES 2022

BOOK CONSUMERS

Number of people in millions



* Due to a change in the GfK Consumer Panel Media*Scope book, the figures for 2019 to 2021 differ slightly from previous publications.

Basis: Representative of 66.2 million people (German resident population aged 10 and over),
Excluding textbooks and reference books, including downloads (audiobooks and ebooks),
Source: GfK Consumer Panel Media*Scope Book



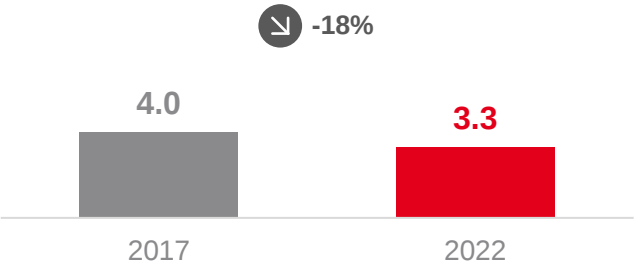
Young Target Groups in the Book Market

Book purchases among 16-29 year olds 2017 and 2022

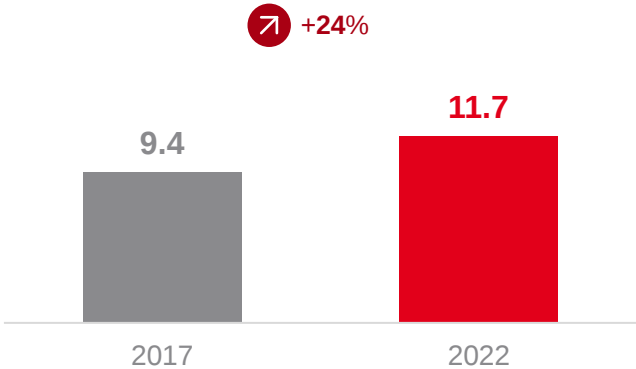
KEY MARKET FIGURES 2022

BOOK CONSUMERS

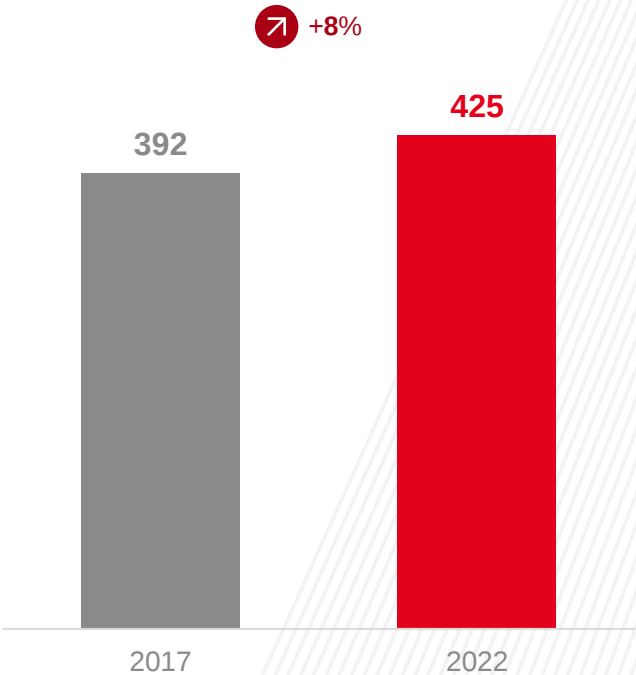
Number of consumers in millions



Books purchased per consumer



Expenditure in € millions

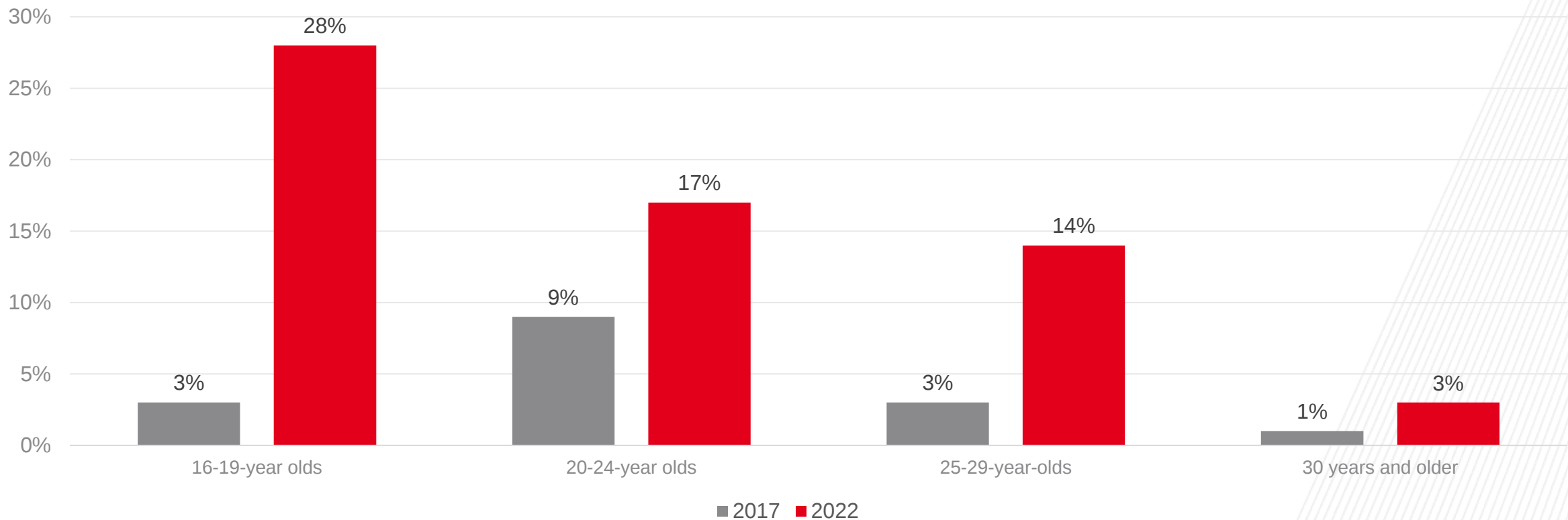


Importance of Social Media as a Source of Awareness

KEY MARKET FIGURES 2022

BOOK CONSUMERS

Share of expenditure on books 2017 and 2022 (awareness sources: social networks, blogs, influencers) by age group



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The Book Market 2023

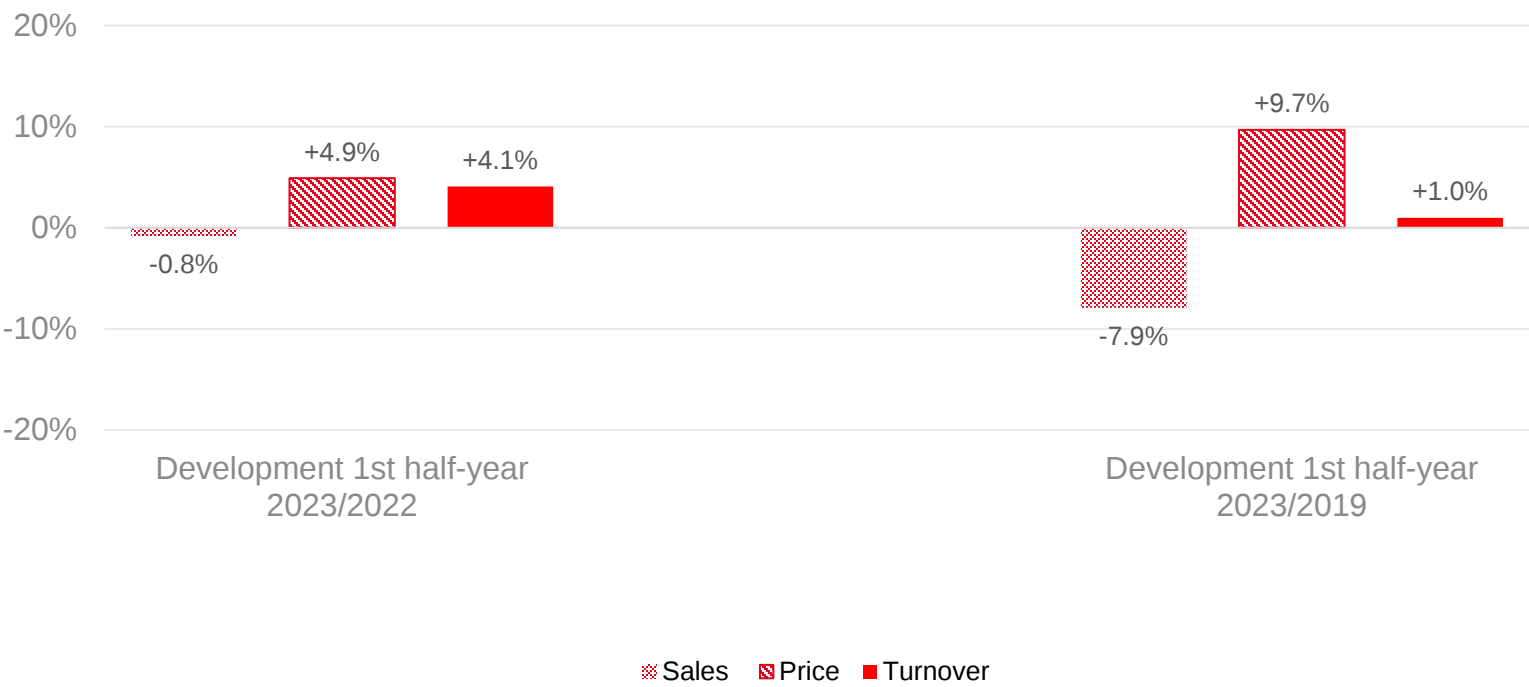
Mid-Year Results and Outlook



Book Market: Mid-Year Results

Cumulative development in the book market 1st HY 2023 to 1st HY 2022 and 1st HY 2019

KEY FIGURES



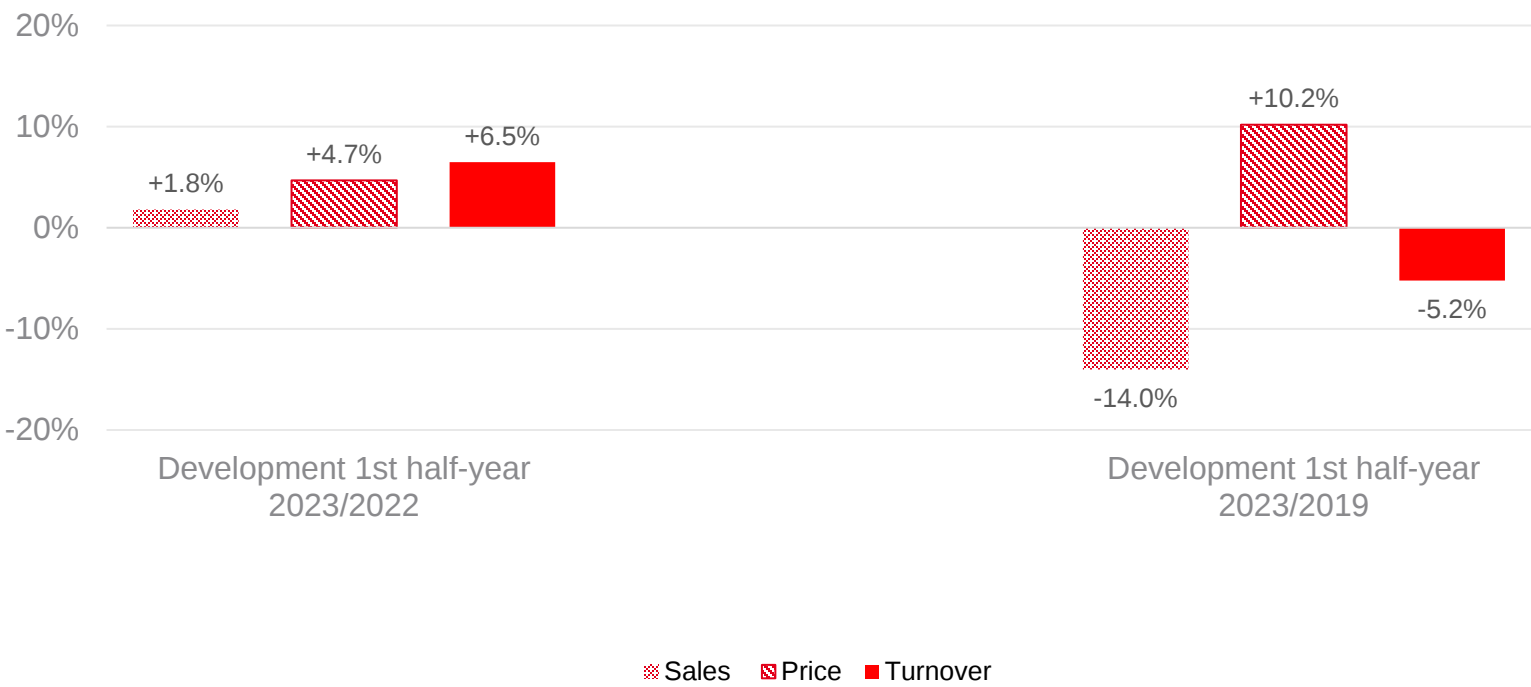
Price development 1st half-year 2023/2019	
Fiction	+12.5%
Children's and Young Adults	+12.5%
Guidebooks	+12.4%
Non-Fiction	+12.1%

Distribution channels: Retail bookstores, train station bookstores, department stores, electrical goods stores and drugstores (cash sales in each case) as well as e-commerce
Source: Media Control, 2023



The Retail Book Trade: Mid-Year Results

Cumulative development in the book market 1st HY 2023 to 1st HY 2022 and 1st HY 2019



Distribution channels: Retail book trade (without e-commerce)
Source: Media Control, 2023



Outlook

Challenges, opportunities and framework conditions

OUTLOOK

OPPORTUNITIES

› Challenges:

- Continuing cost pressure, little relief
- Consumer climate not yet recovered, incl. low footfall in cities
- Efforts towards sustainable management

› Opportunities:

- Building bridges from digital trends to physical trade, e.g. BookTok
- KulturPass for 18-year-olds: important instrument for reaching a young cultural audience

› Framework conditions:

- Promotion of reading: Urgent need for action in view of continuous deterioration in reading literacy
- Structural funding, especially for publishers (as promised in the coalition agreement)
- Inner city revitalisation programmes, role of bookstores

