

The Publishing Market in Germany

Summer School
School of Information Management
Nanjing University

Svenja Hagenhoff
Institute for the Study of the Book
Epublishing and Digital Markets Group

August 2012



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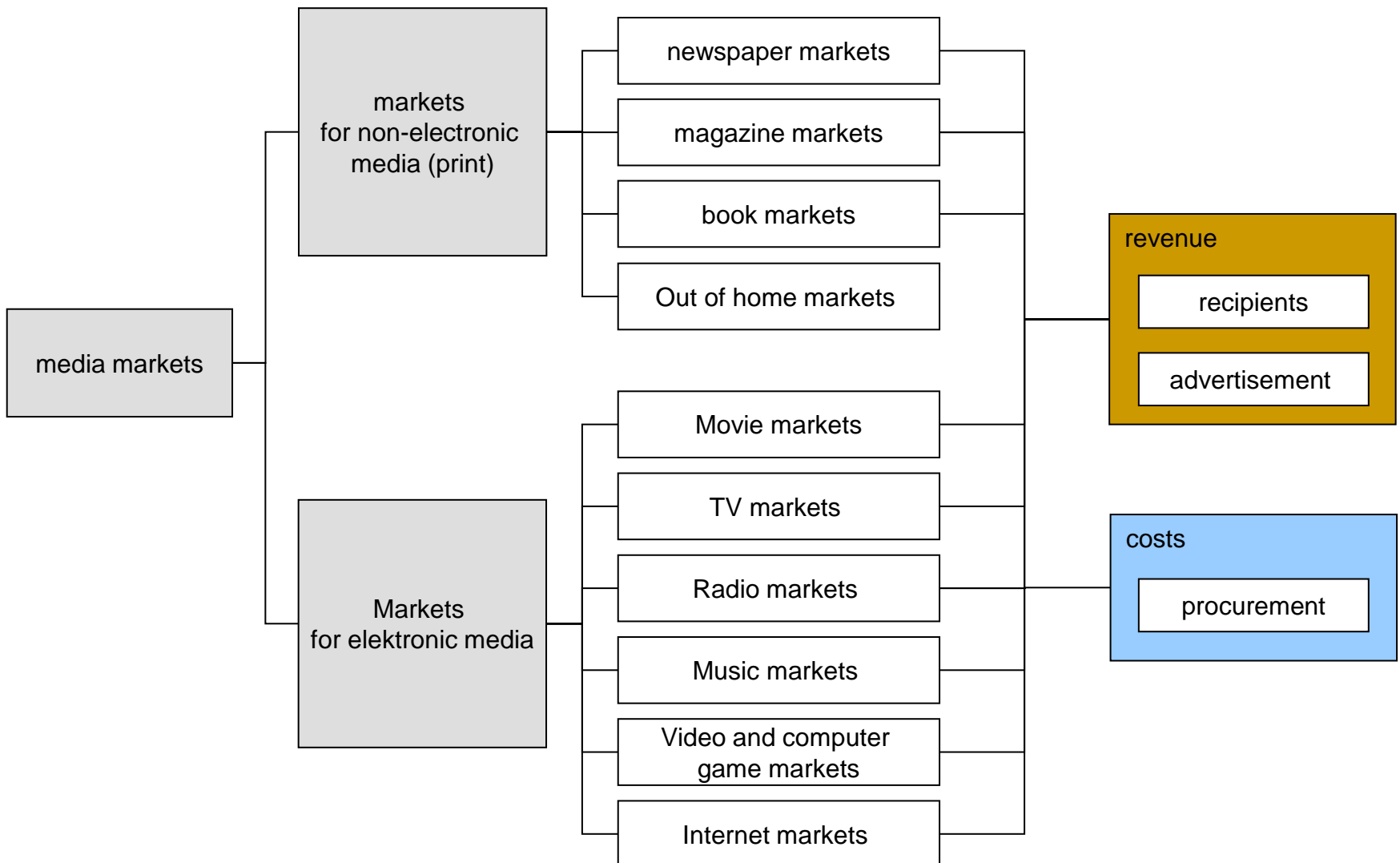
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- 2011 – Present: Professor for E-Publishing and Digital Markets at [Friedrich-Alexander University Erlangen-Nuremberg](#), Germany
- 2011 - 2012: Lecturer for Media Management at [University of Applied Sciences St. Pölten](#), Sankt Pölten, Austria
- 2010 - 2011: Head of the Institute of Media Economics at [University of Applied Sciences St. Pölten](#), Sankt Pölten, Austria
- 2009 - 2010: Lecturer for Information Systems at [Welfenakademie Braunschweig](#), Braunschweig, Germany
- 2007 – 2007: Lecturer für E-Commerce at [International School of New Media at the University of Lübeck](#), Lübeck, Germany
- 2006 – 2006: Guest Researcher at [UCLA Anderson School of Management](#), Los Angeles, California, United States
- 2004 – 2005: Interims Professor of Information Systems at [Universität Hildesheim - University of Hildesheim](#), Hildesheim, Germany
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- 1997 – 2002: Research Assistant at [Georg-August Universität](#), Göttingen, Germany
- 1992 – 1997: Studying Business Administration and Information Systems at Georg-August University Göttingen, Germany

- Media Market in General
- Markets for Specific Types of Media
- E-Publishing and Paid Digital Content
- Regulatory Aspects
- Innovative Business Models
- Results of a Survey: Crossmedia Publishing

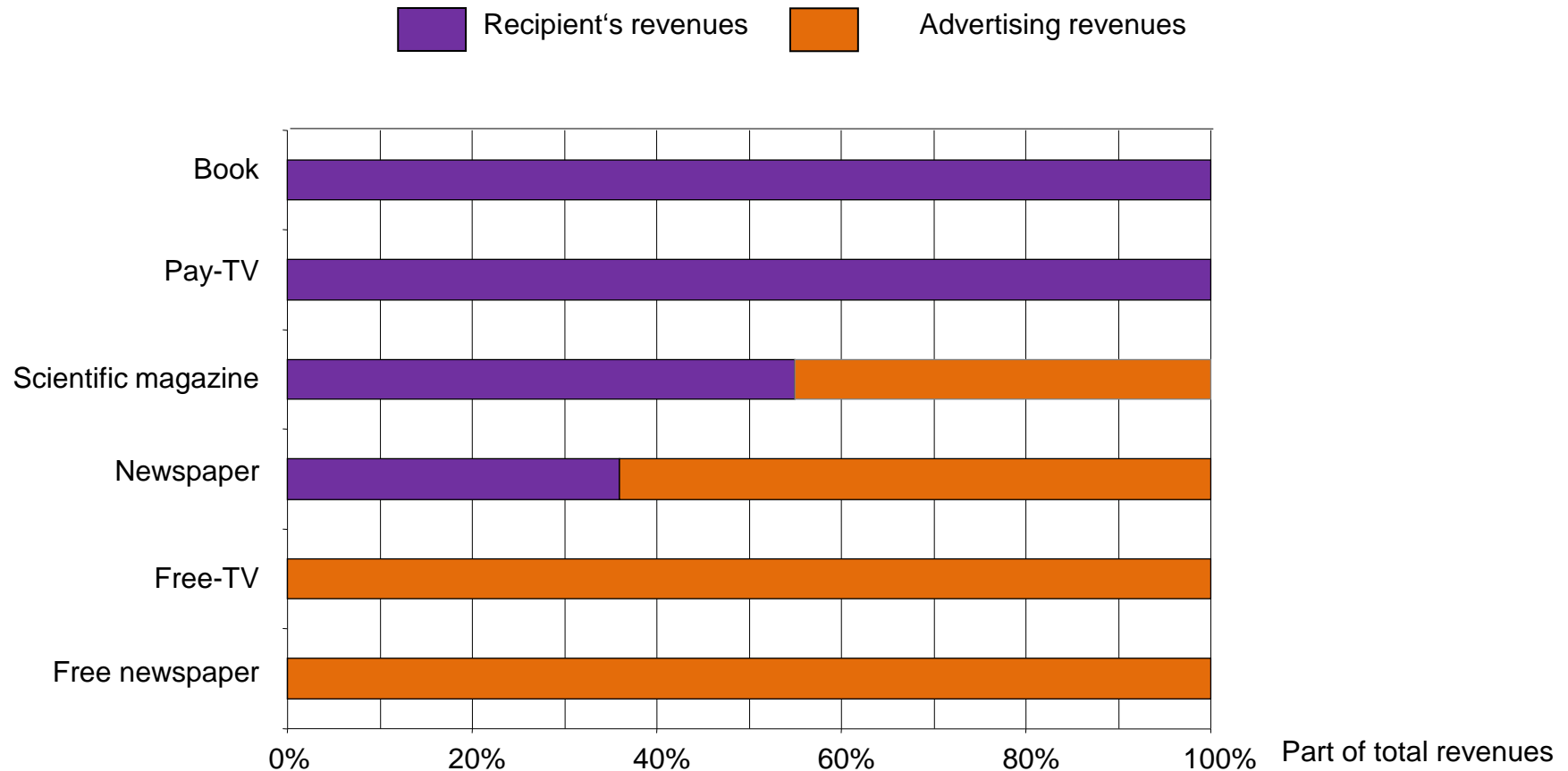
- Structure
- Revenues
- Media Usage

Structure of the German media market

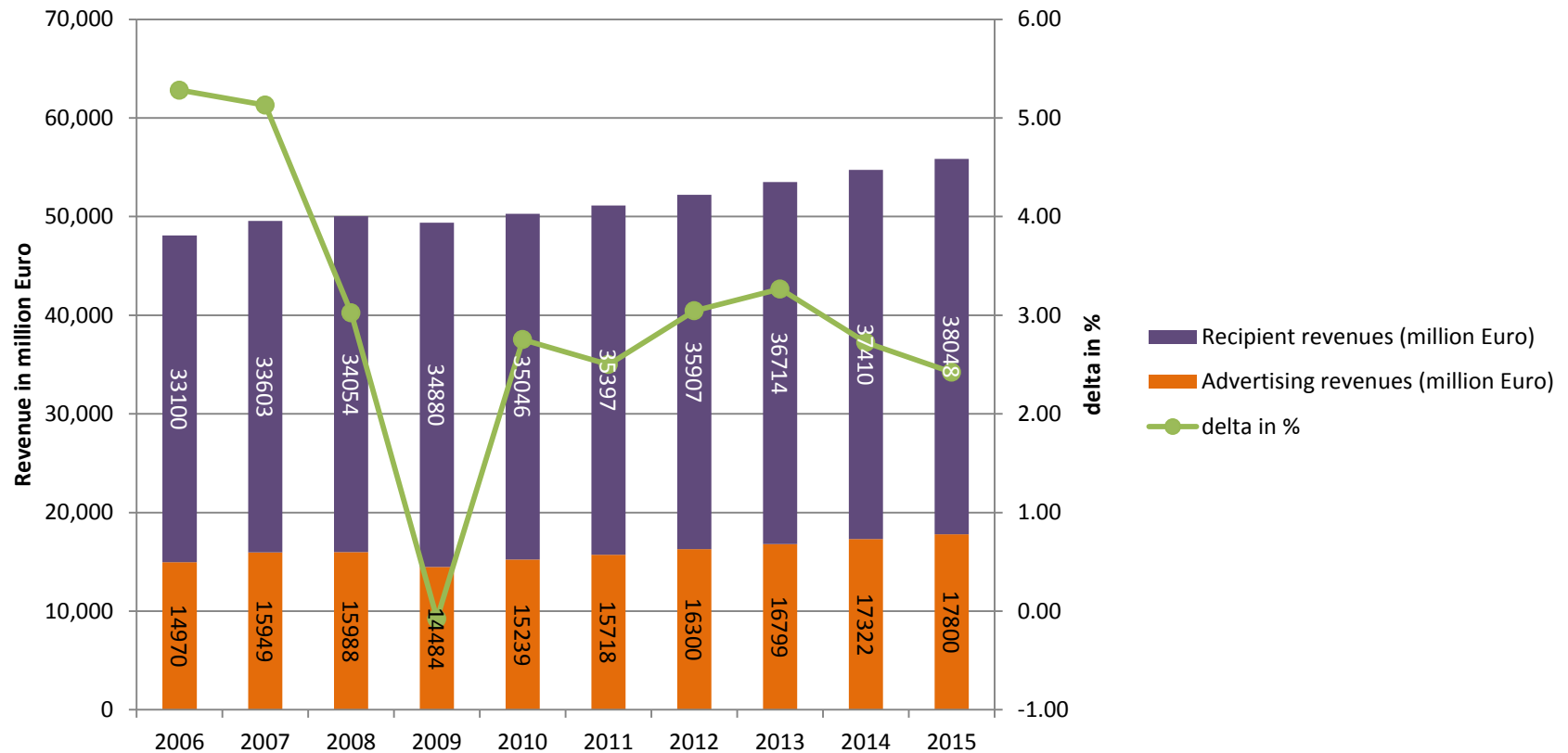


- Structure
- Revenues
- Media Usage

Different kinds of revenues

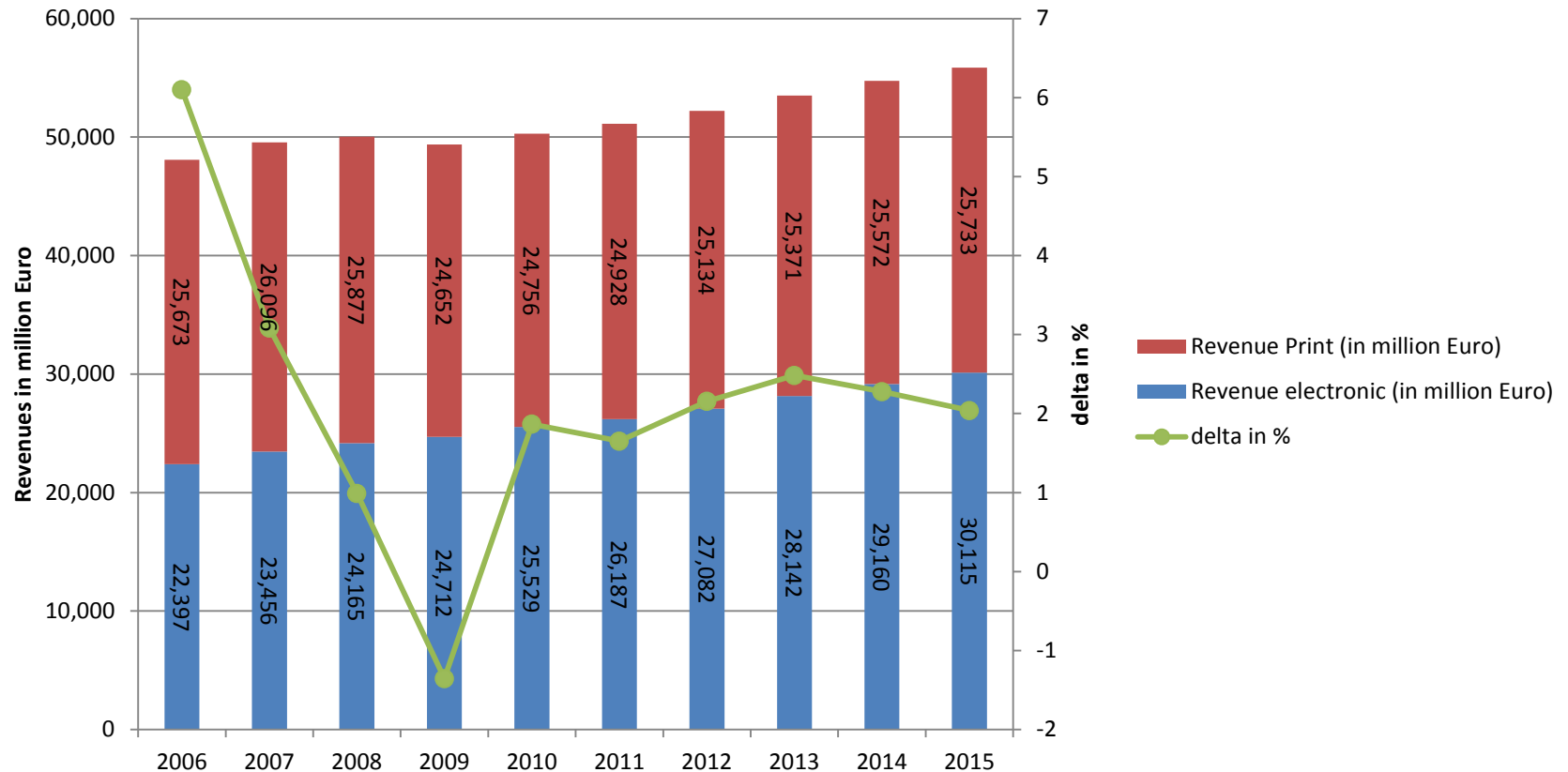


Revenue trend total (advertisement & recipients)



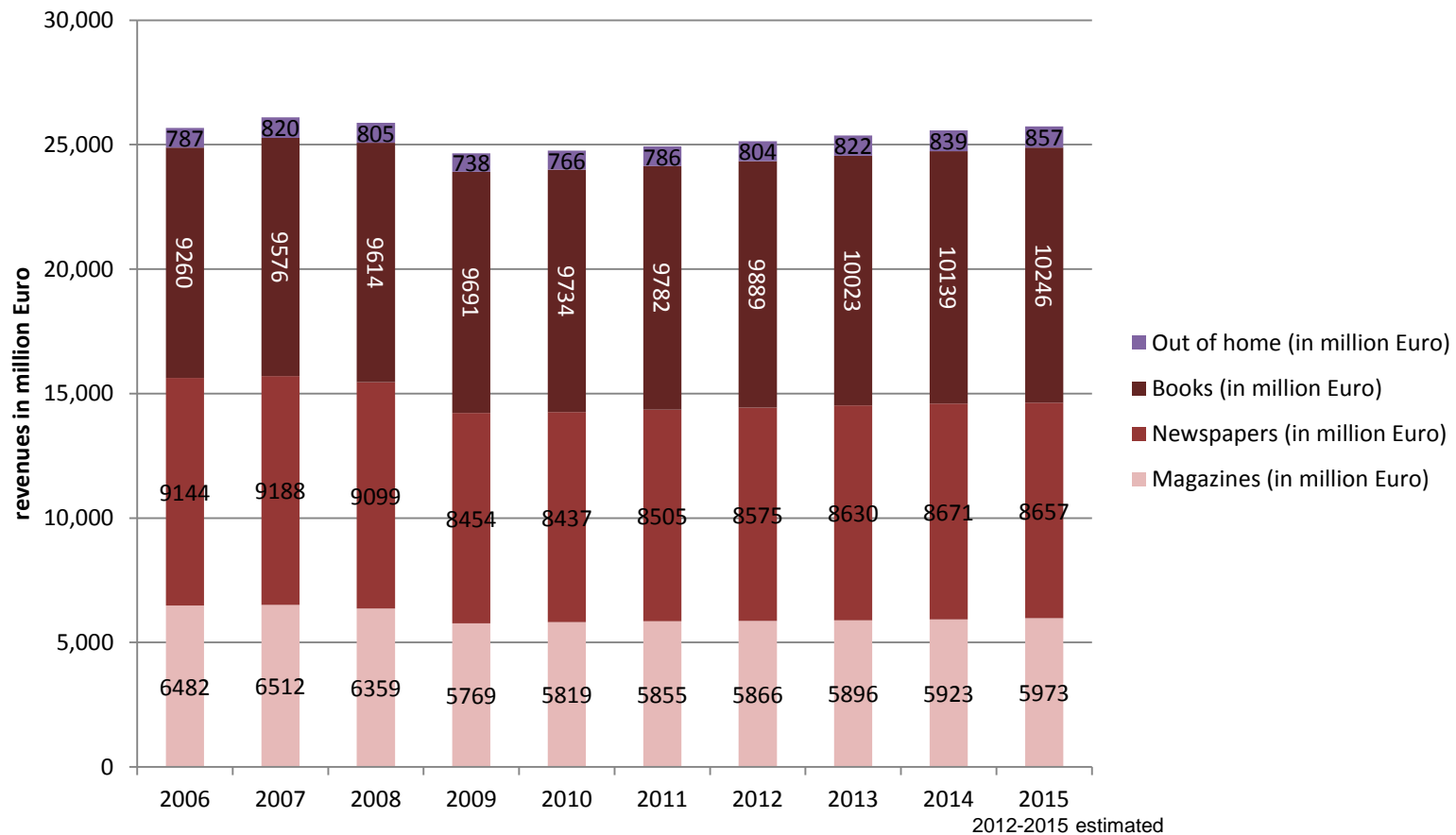
2012-2015 estimated

Revenue trend total (print & electronic)

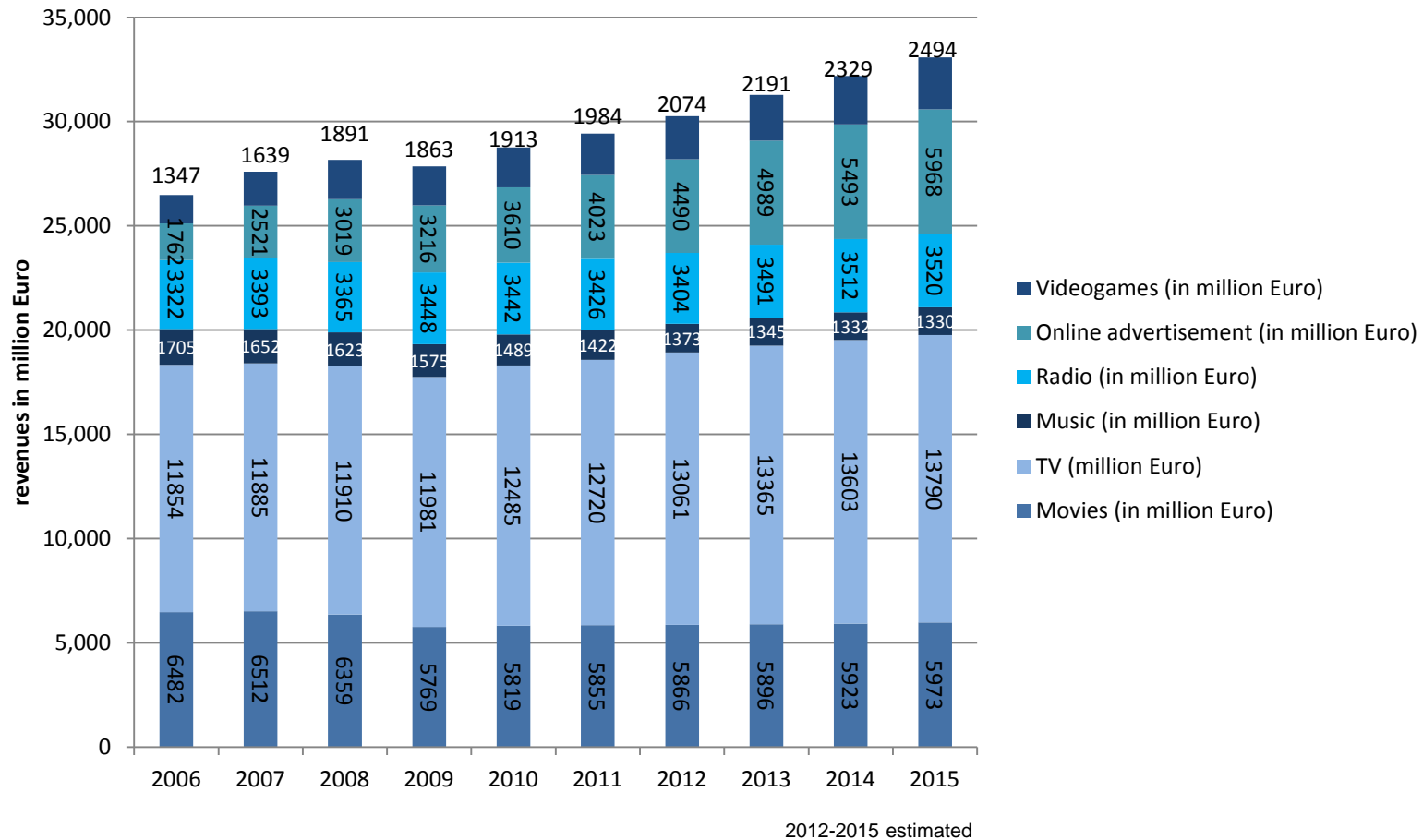


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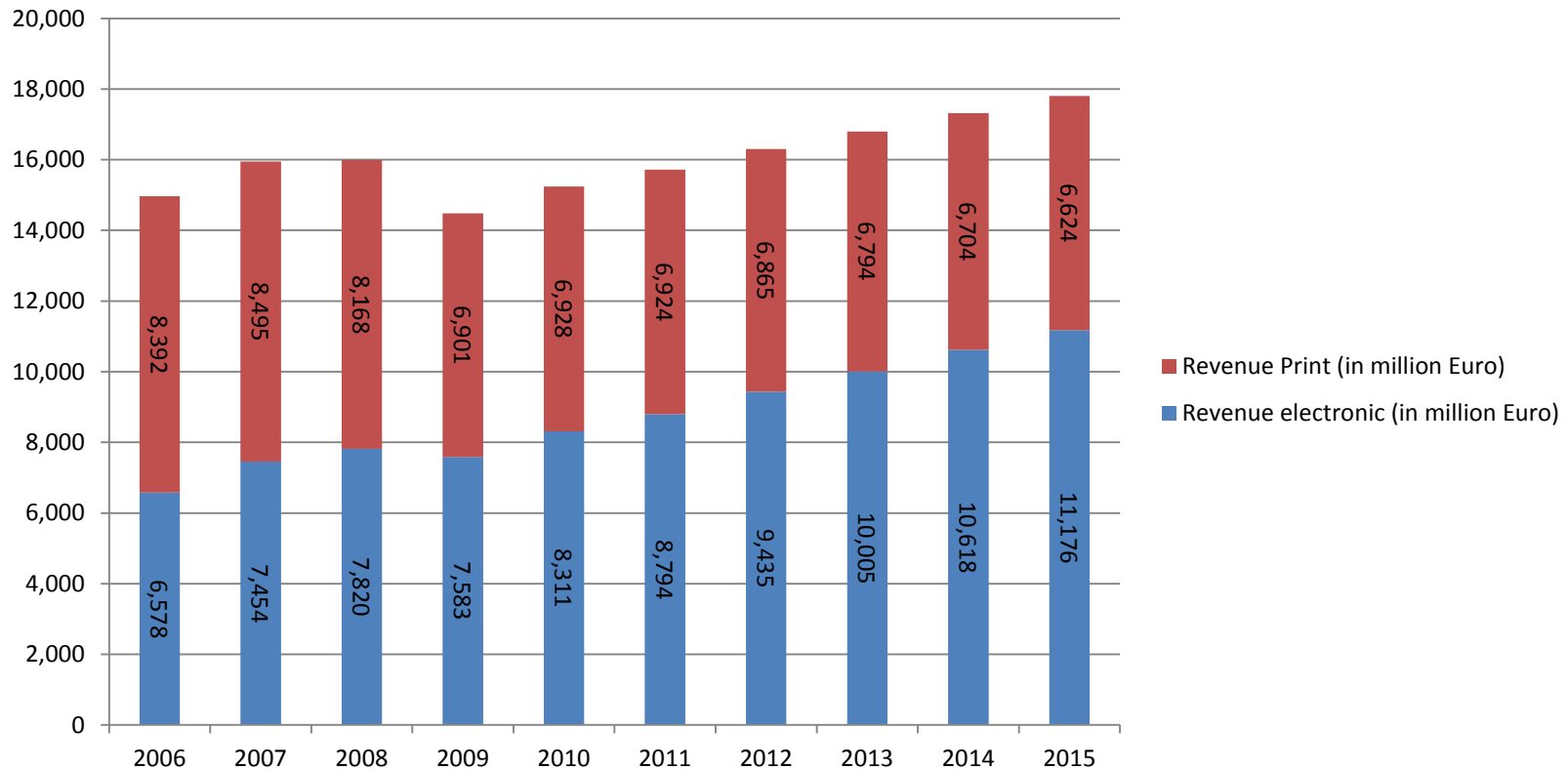
Revenue trend total (a&r): print market



Revenue trend total (a&r): electronic market

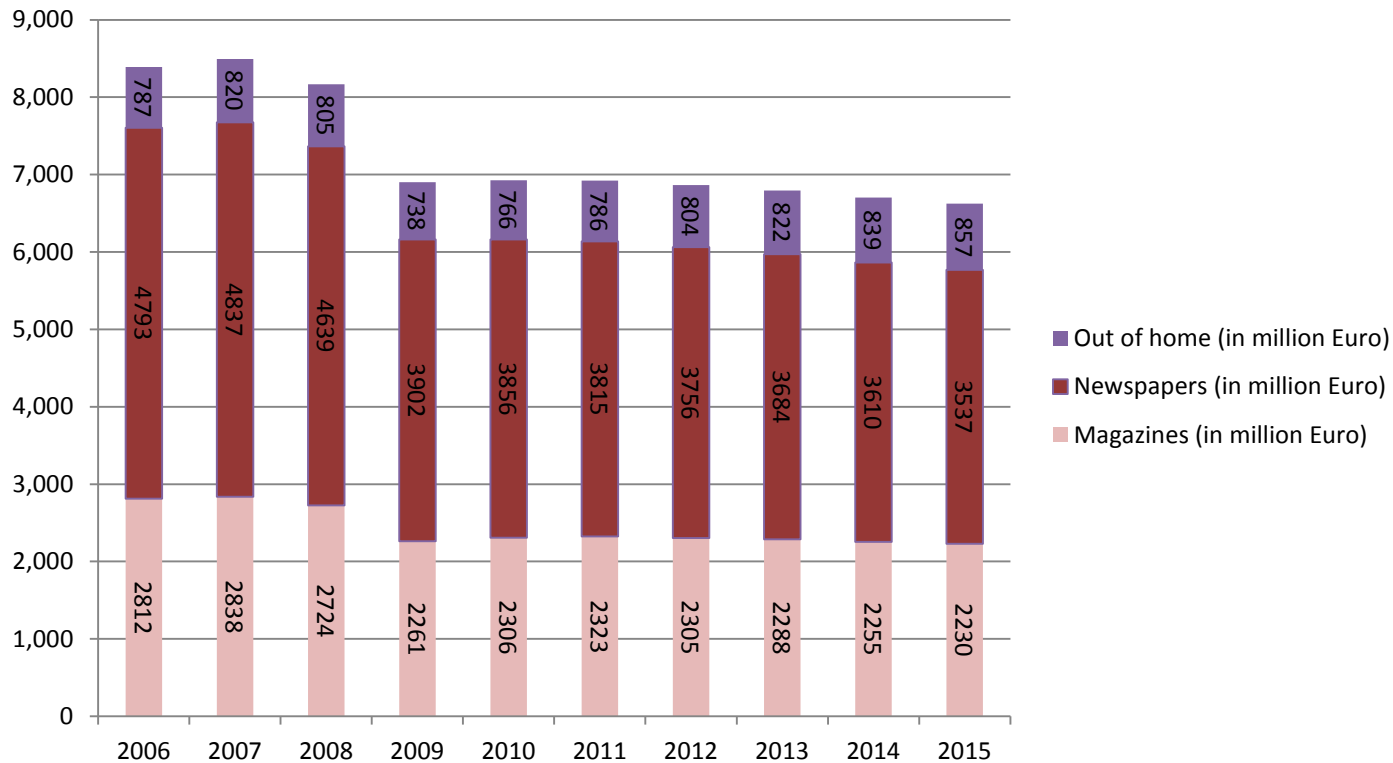


Revenue trend advertising: total



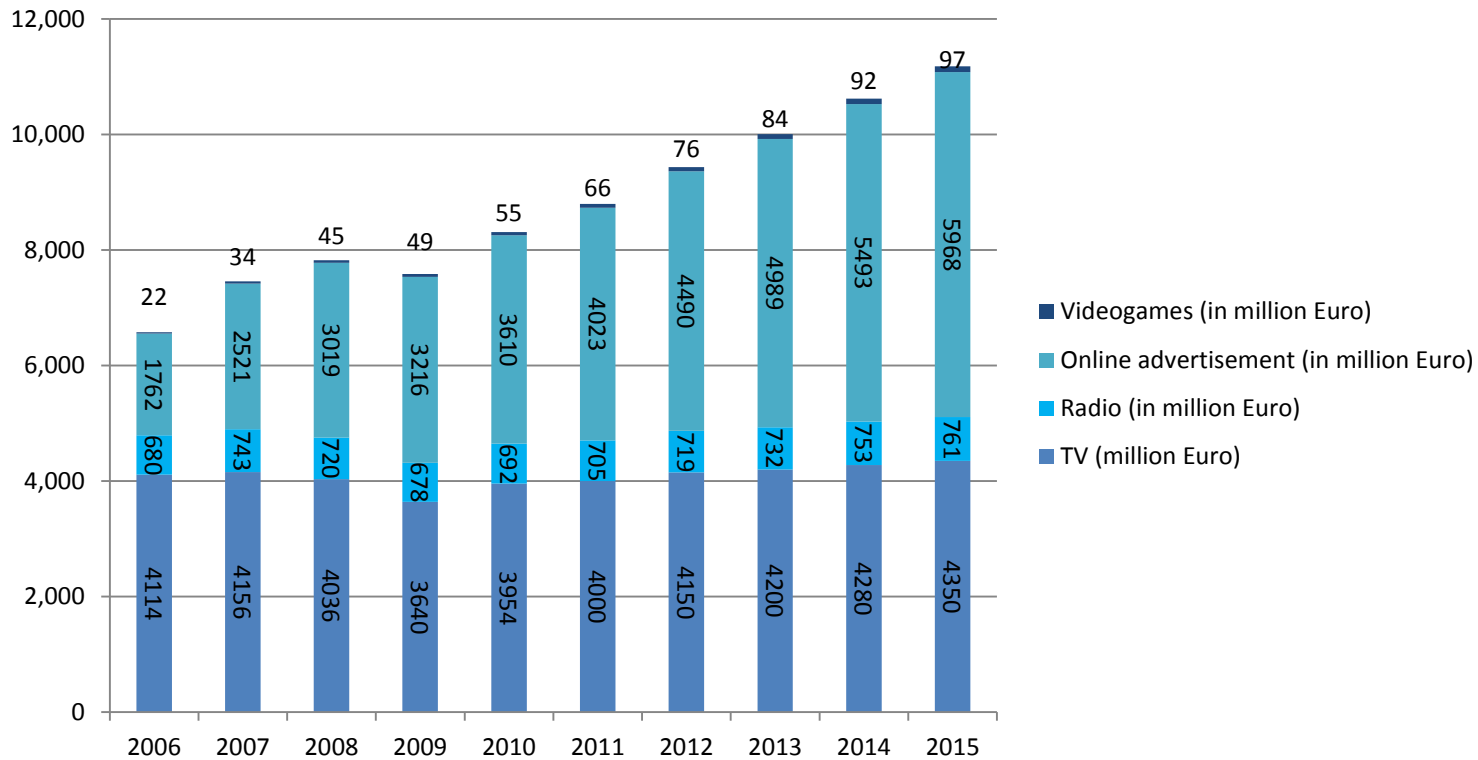
2012-2015 estimated

Revenue trend advertising: print market



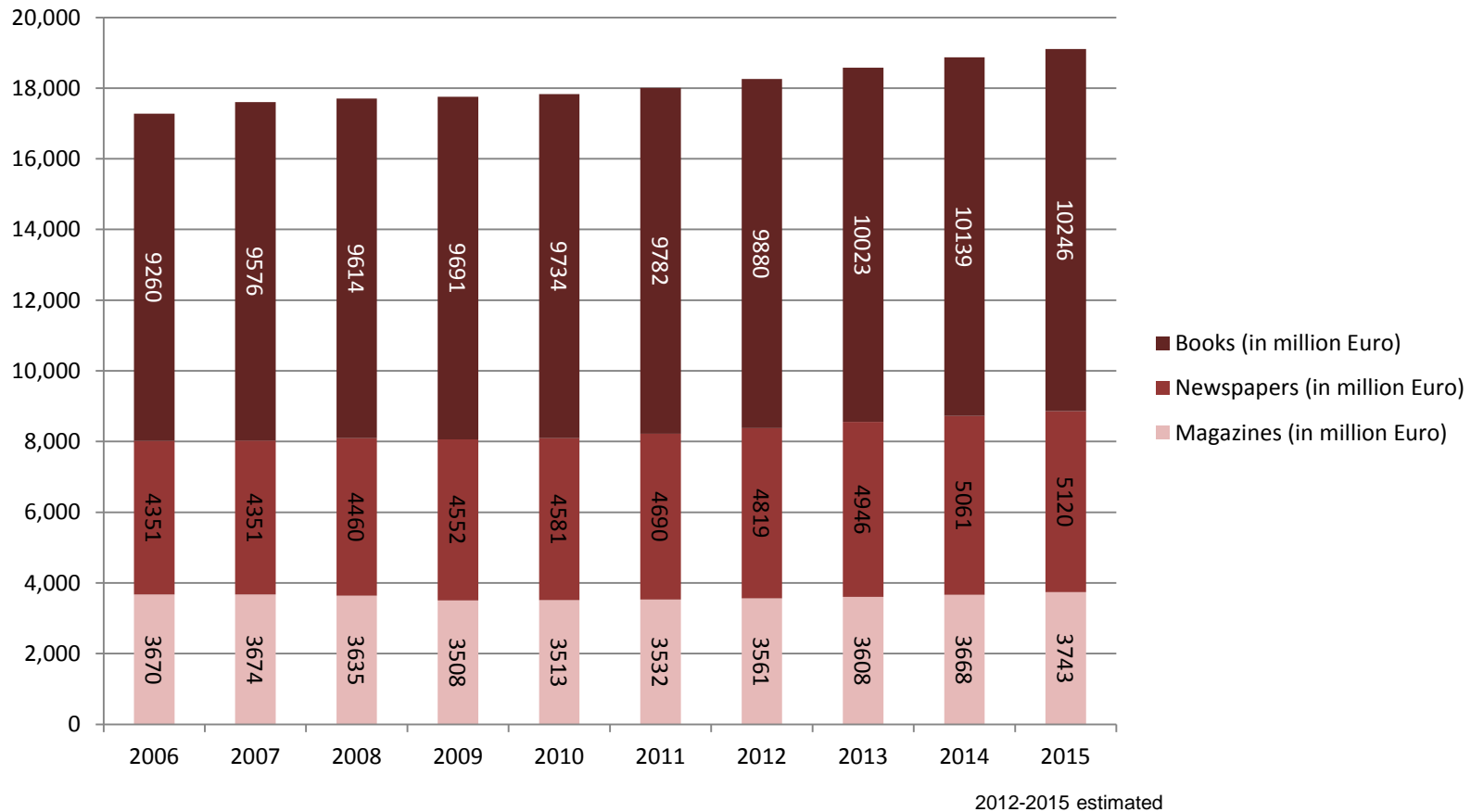
2012-2015 estimated

Revenue trend advertising: electronic market

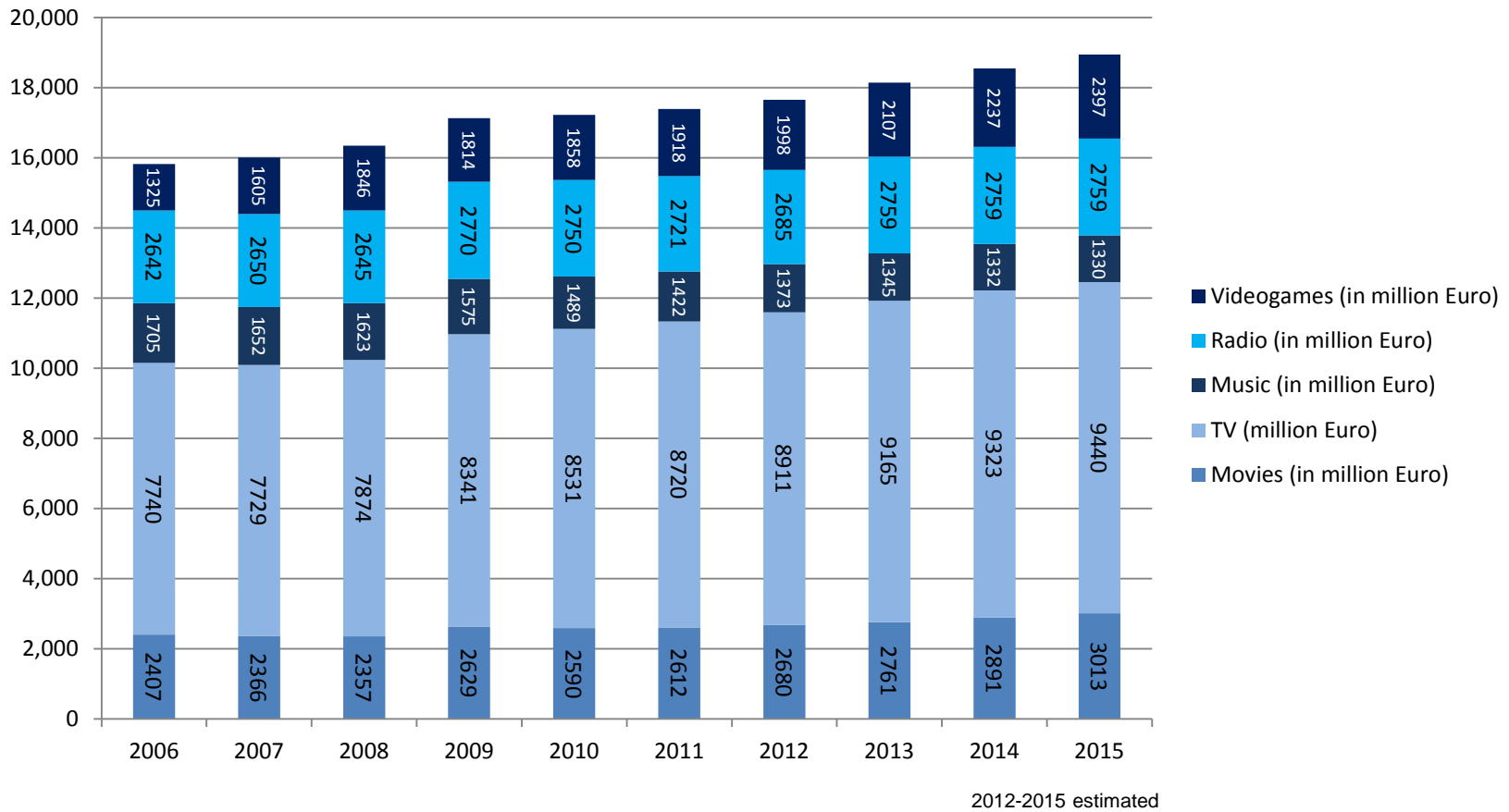


2012-2015 estimated

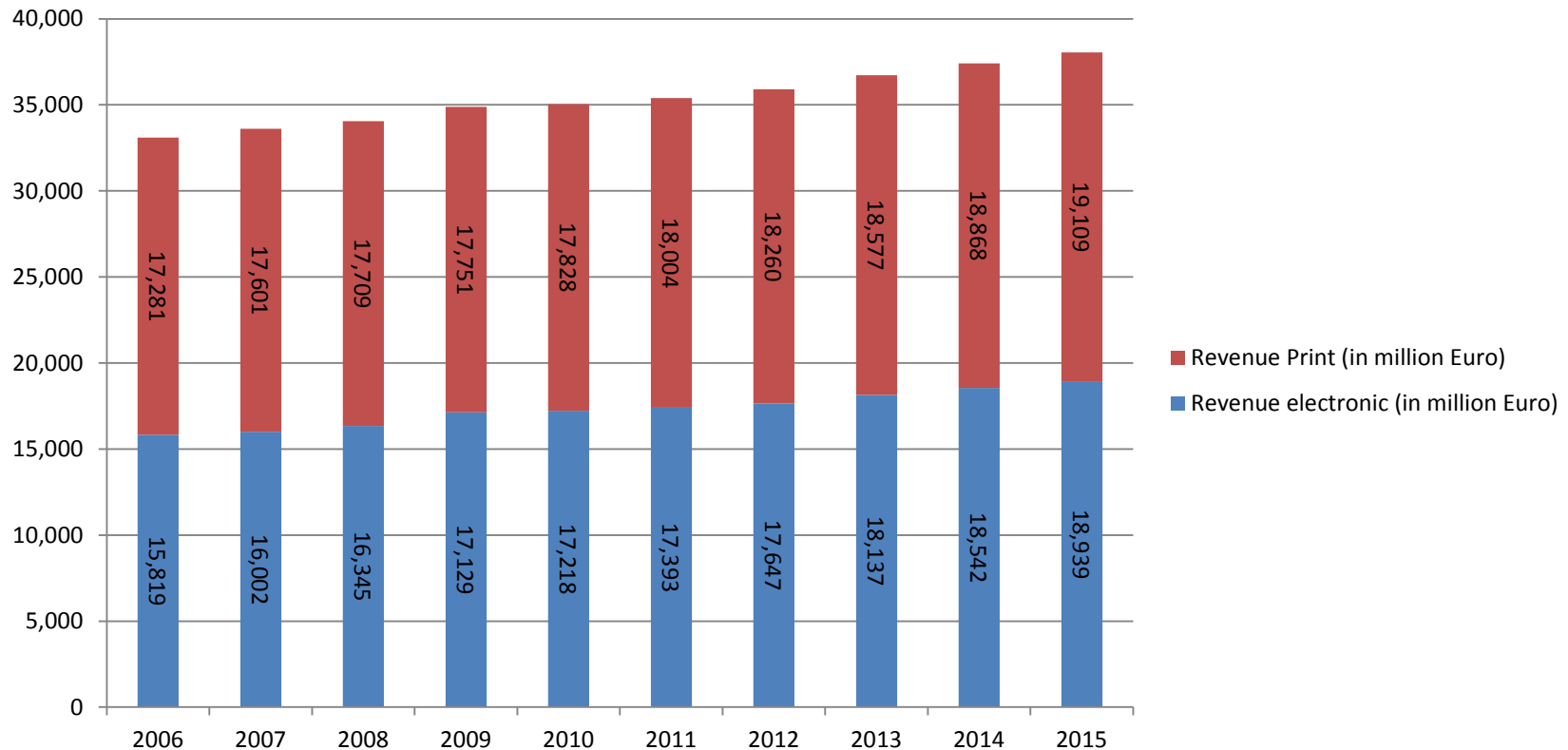
Revenue trend recipients: print market



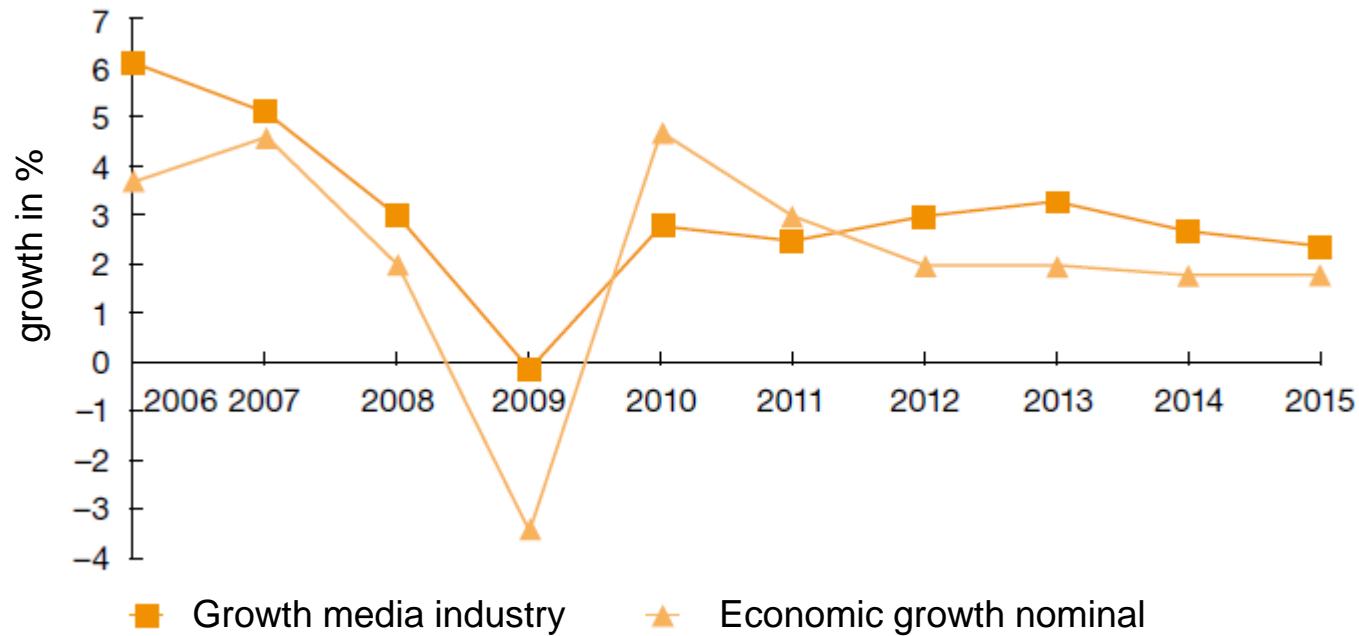
Revenue trend recipients: electronic market



Revenue trend recipients: total

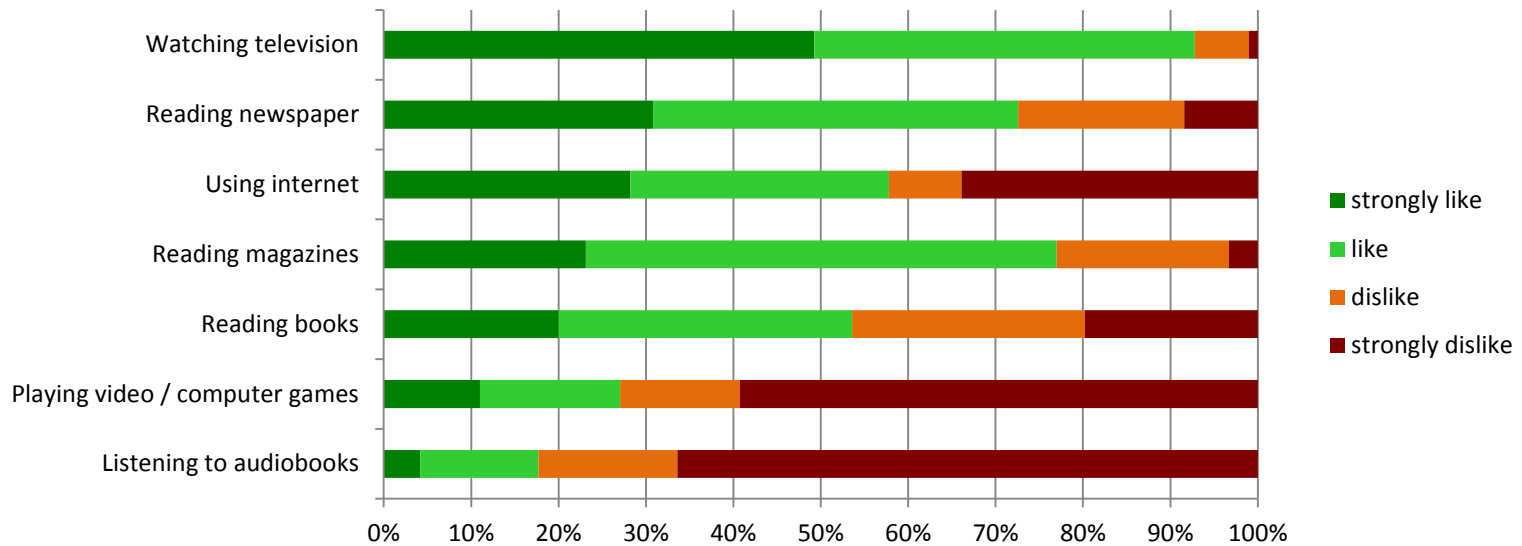


2012-2015 estimated

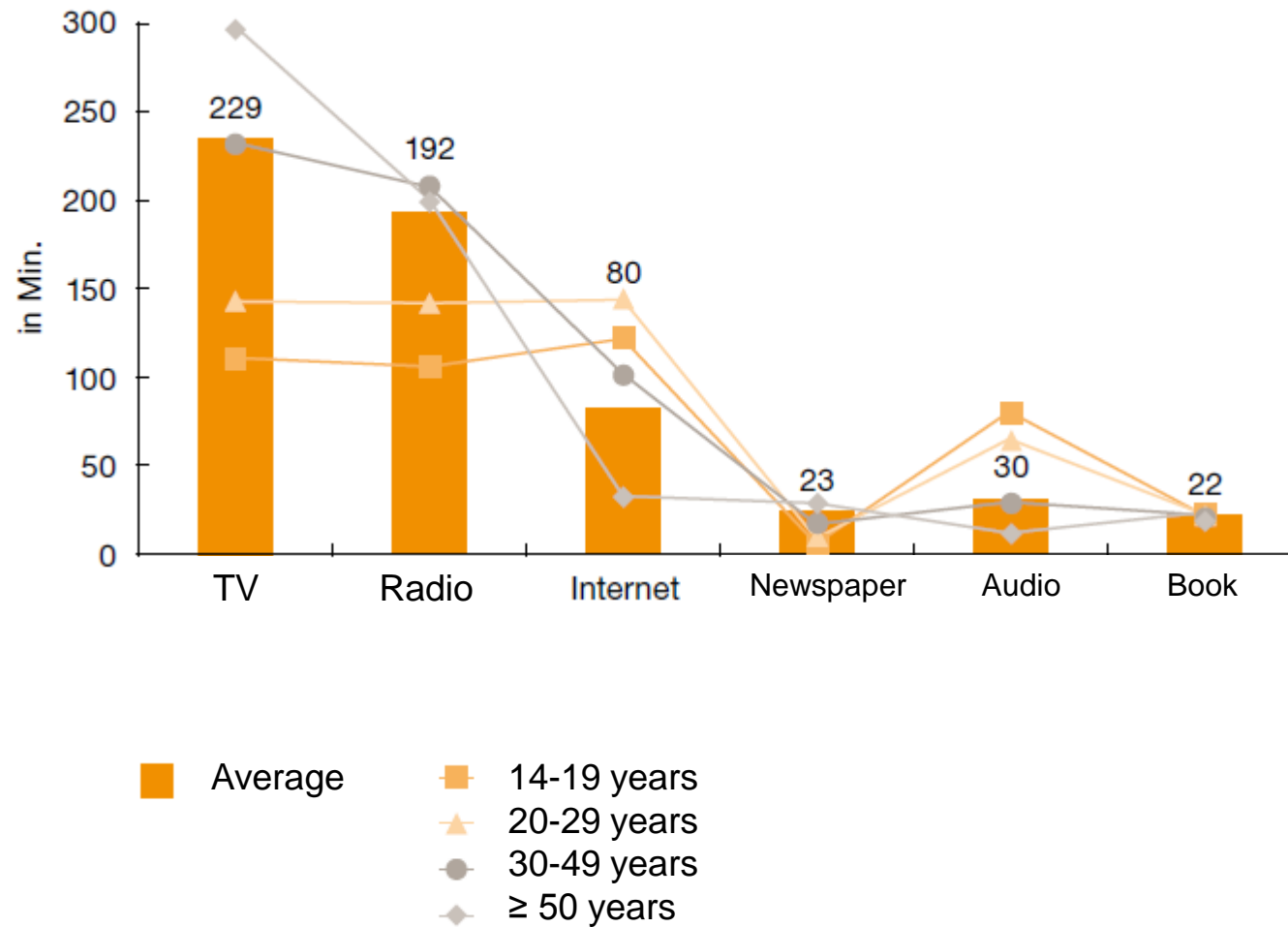


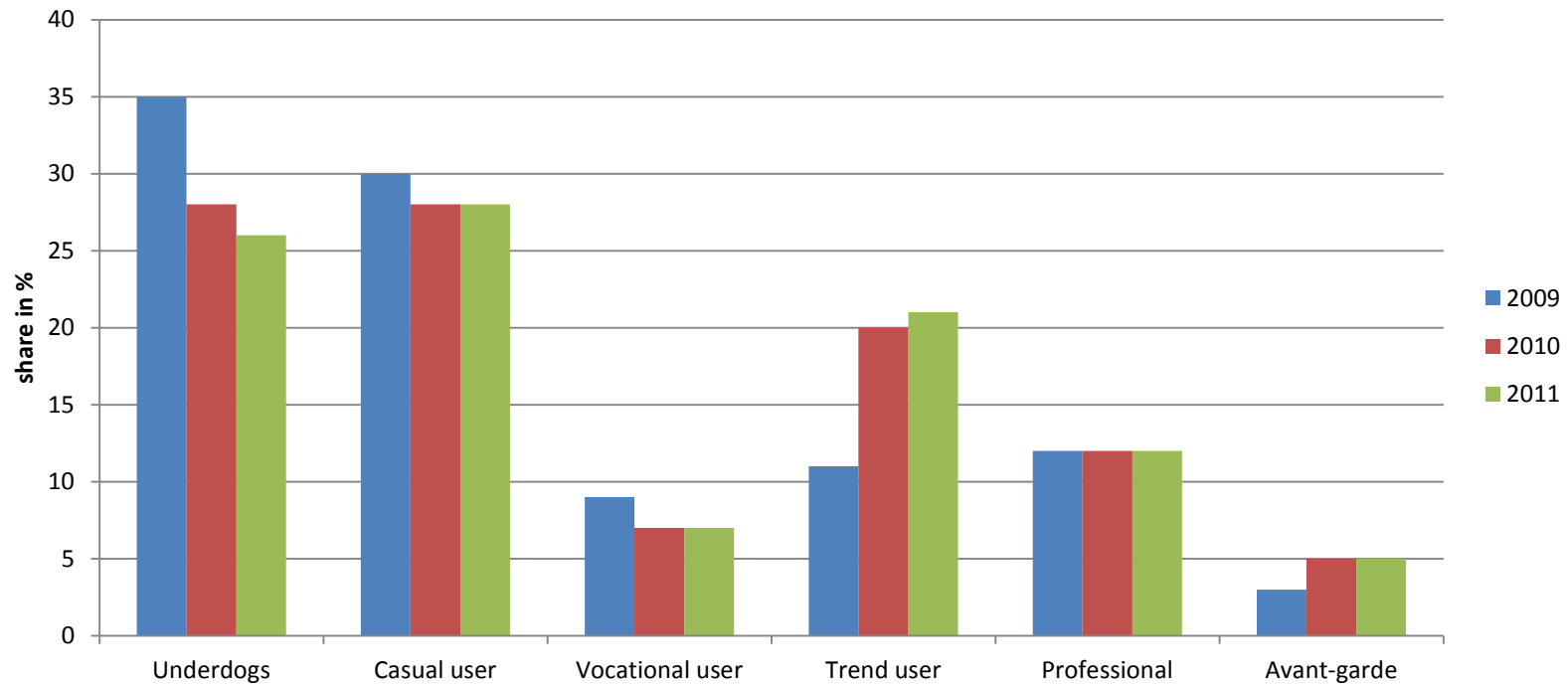
2012-2015 estimated

- Structure
- Revenues
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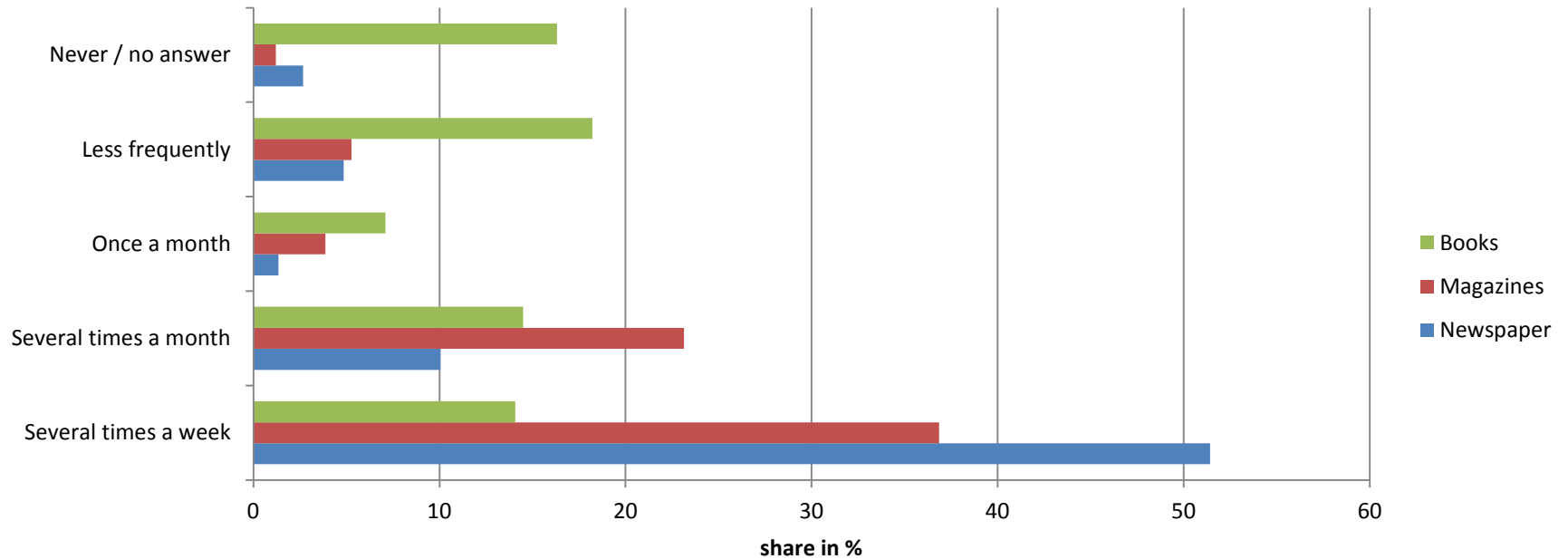


Media use 2011 in minutes per day

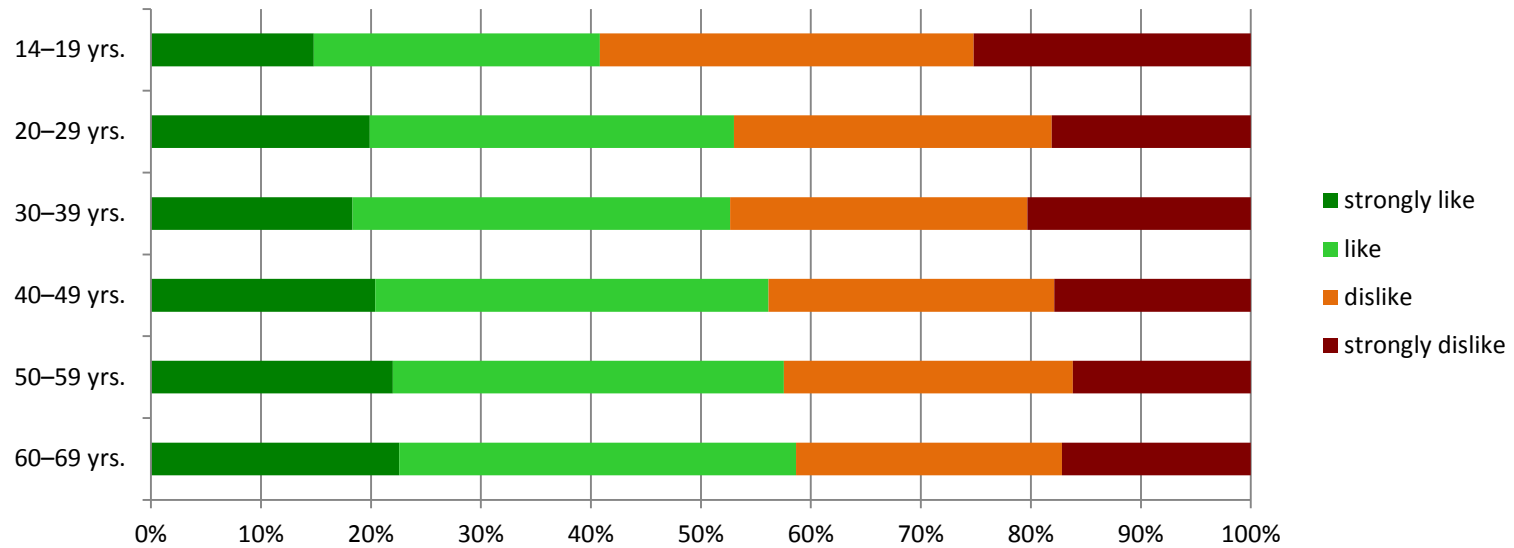




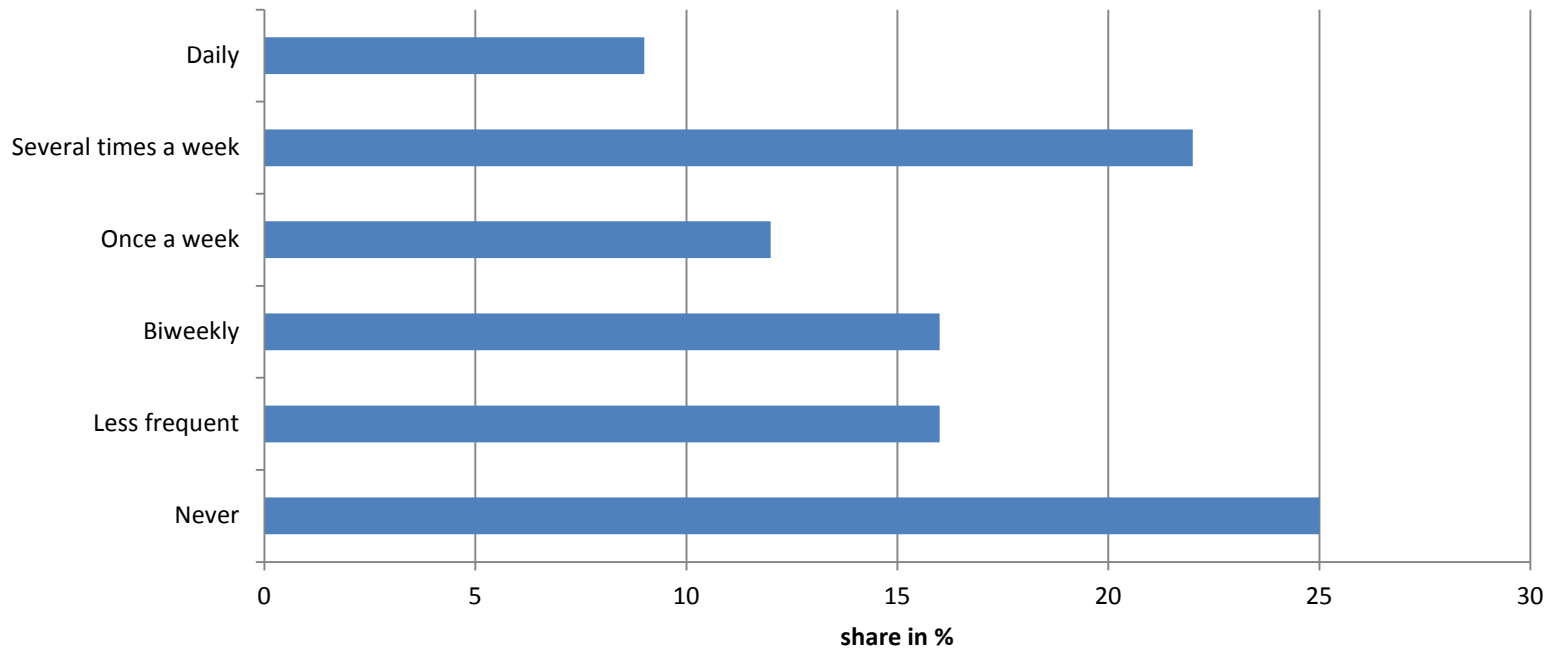
How often do you read certain media? (2007-2011)



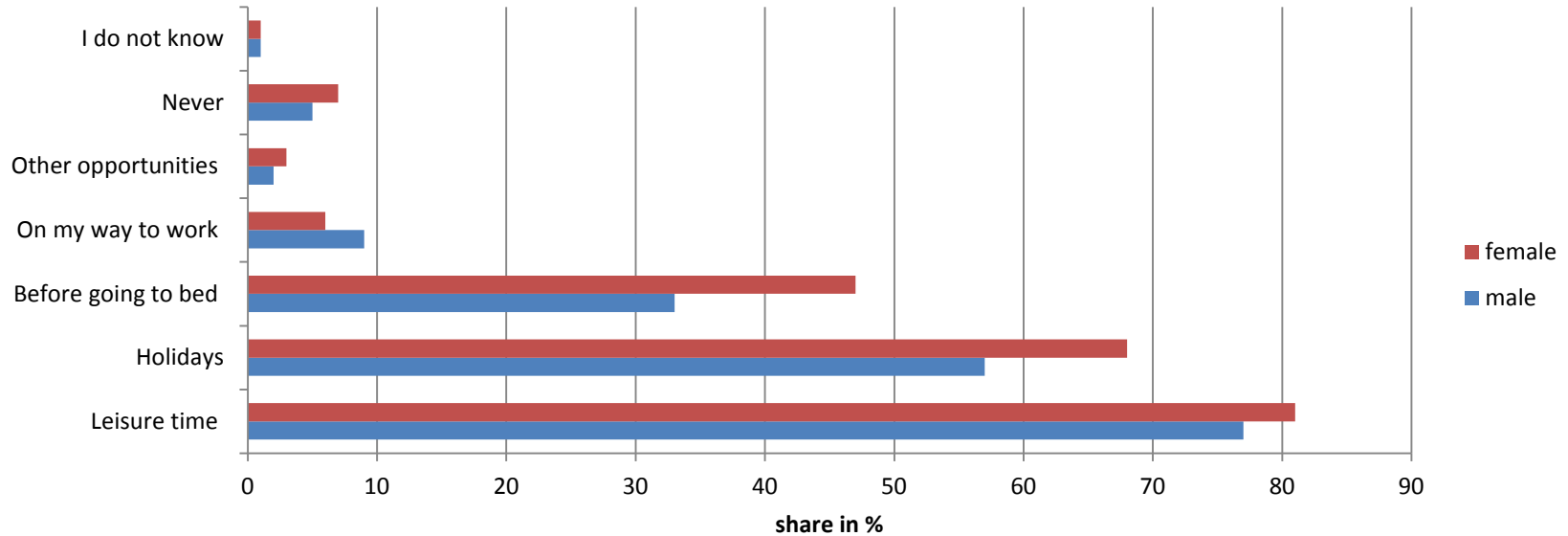
Book reading in Germany (2011)



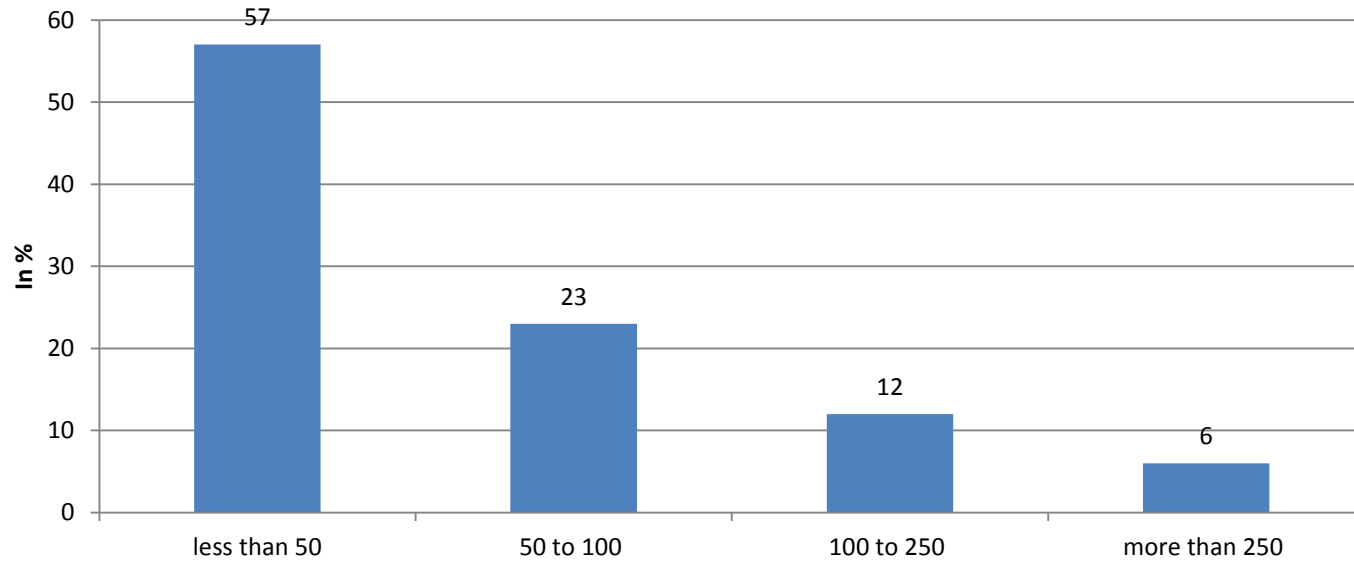
How often do you read books? (2008)



When do you read books? (2008)



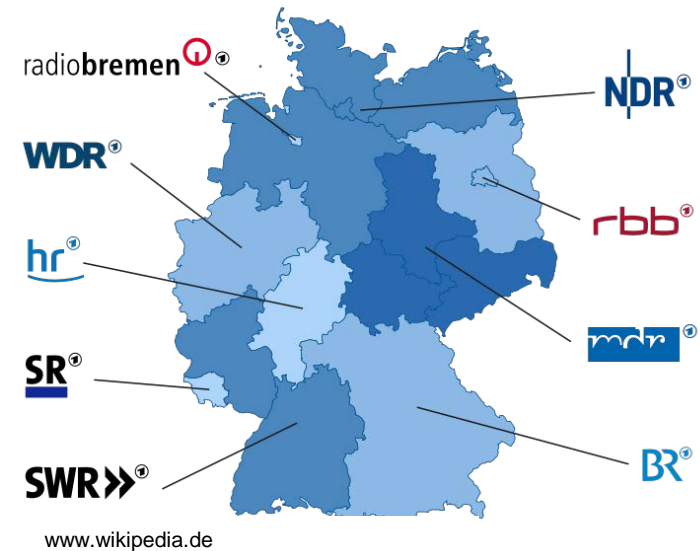
How many books do you have at home? (2008)



- Media Market in General
- Markets for Specific Types of Media
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- Regulatory Aspects
- Innovative Business Models
- Results of a Survey: Crossmedia Publishing

- TV and Radio Markets
- Newspaper Markets
- Magazine Markets
- Book Markets

- Mission
 - public service, speaking to and engaging as a citizen (UNESCO & World Radio and Television Council)
 - Diffusion of information not influenced by politic or commercial companies
- Funding:
 - money collected from each person who owns a TV or radio device (license fees)
 - Money from advertising customers
- History: first public broadcaster in Europe was BBC

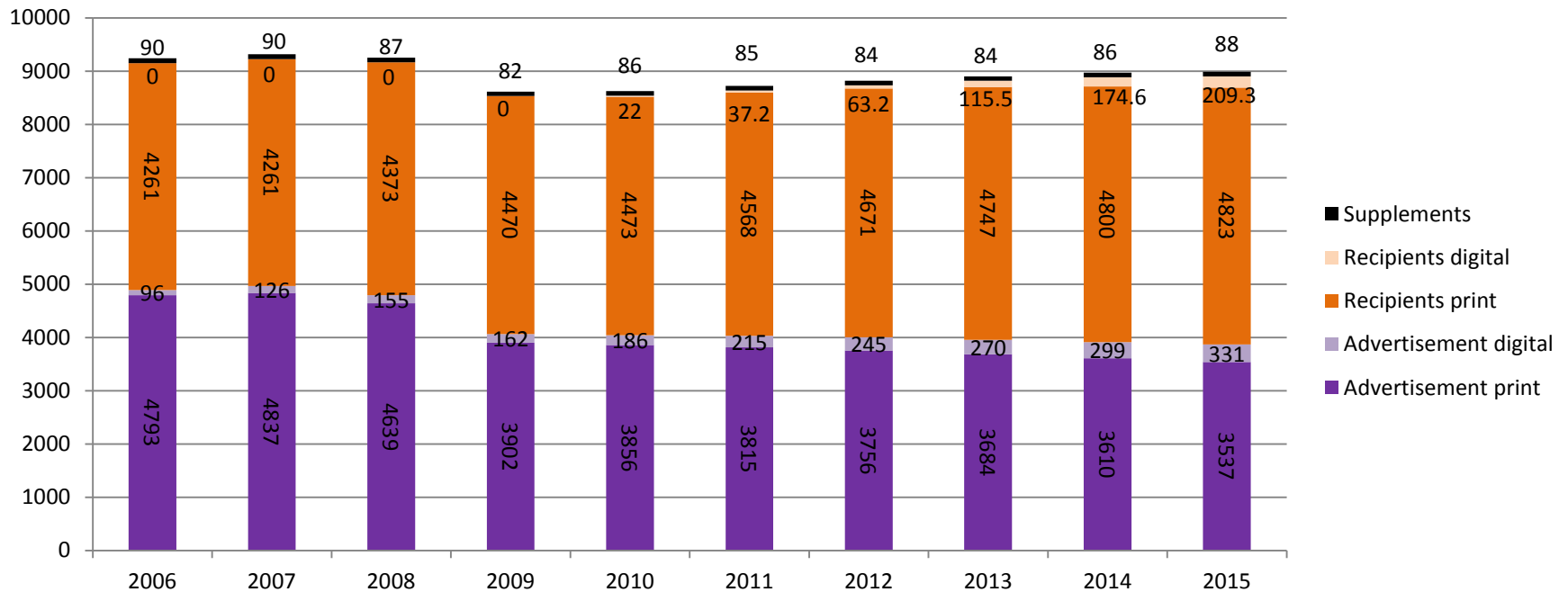


- Mission:
 - Very different concepts
 - often specialized programs (e.g. only sports, only movies,...)
- Funding:
 - Money from advertising customers
 - Pay TV
- History: beginning of 1980ies deregulation of the broadcasting market in Europe started



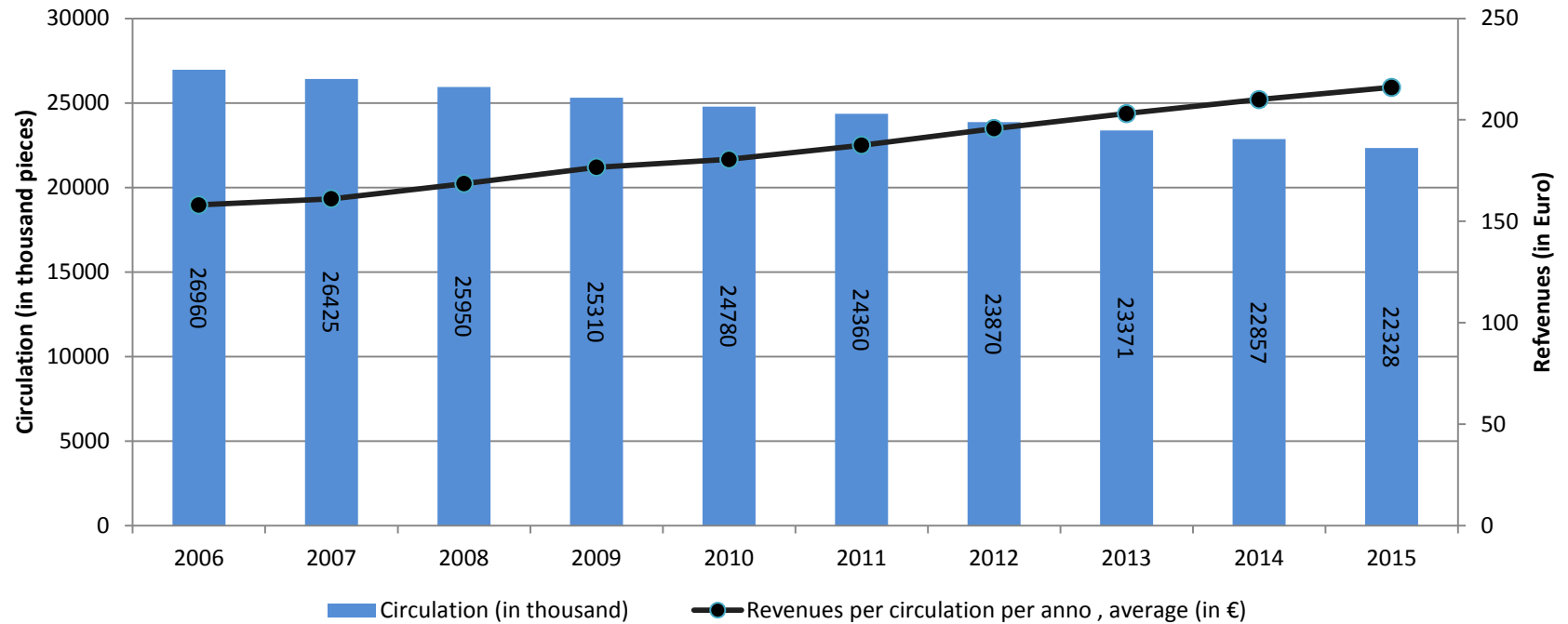
- TV and Radio Markets
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- Magazine Markets
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Revenue trend newspaper market



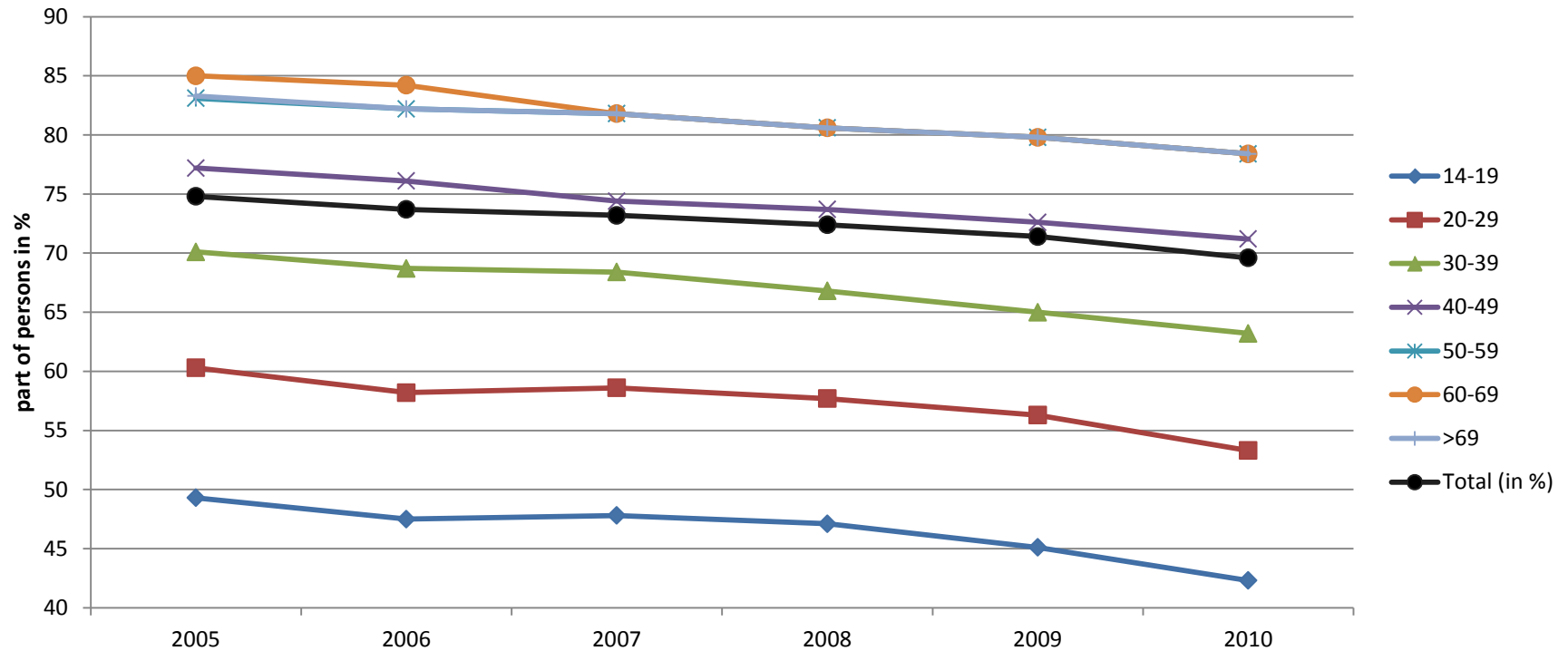
2012-2015 estimated

Revenue trend newspaper

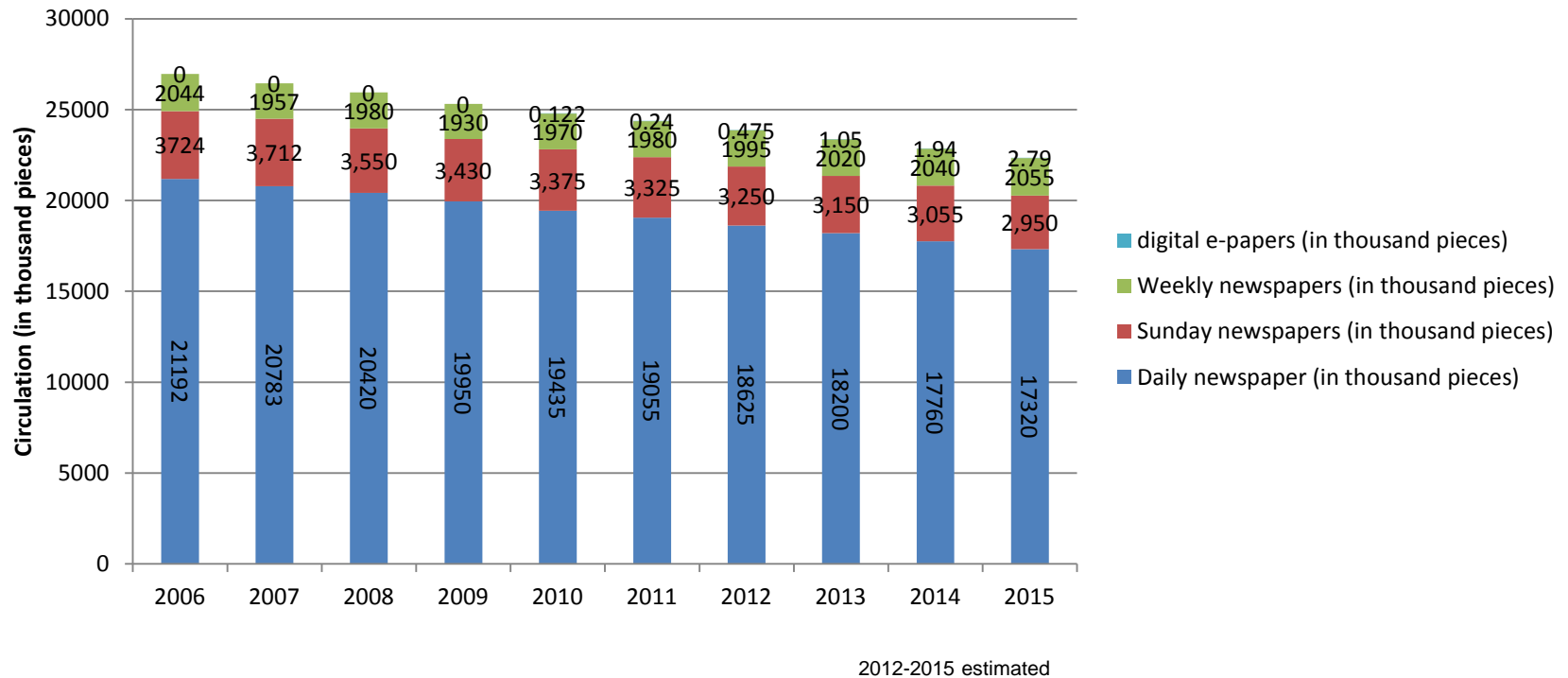


2012-2015 estimated

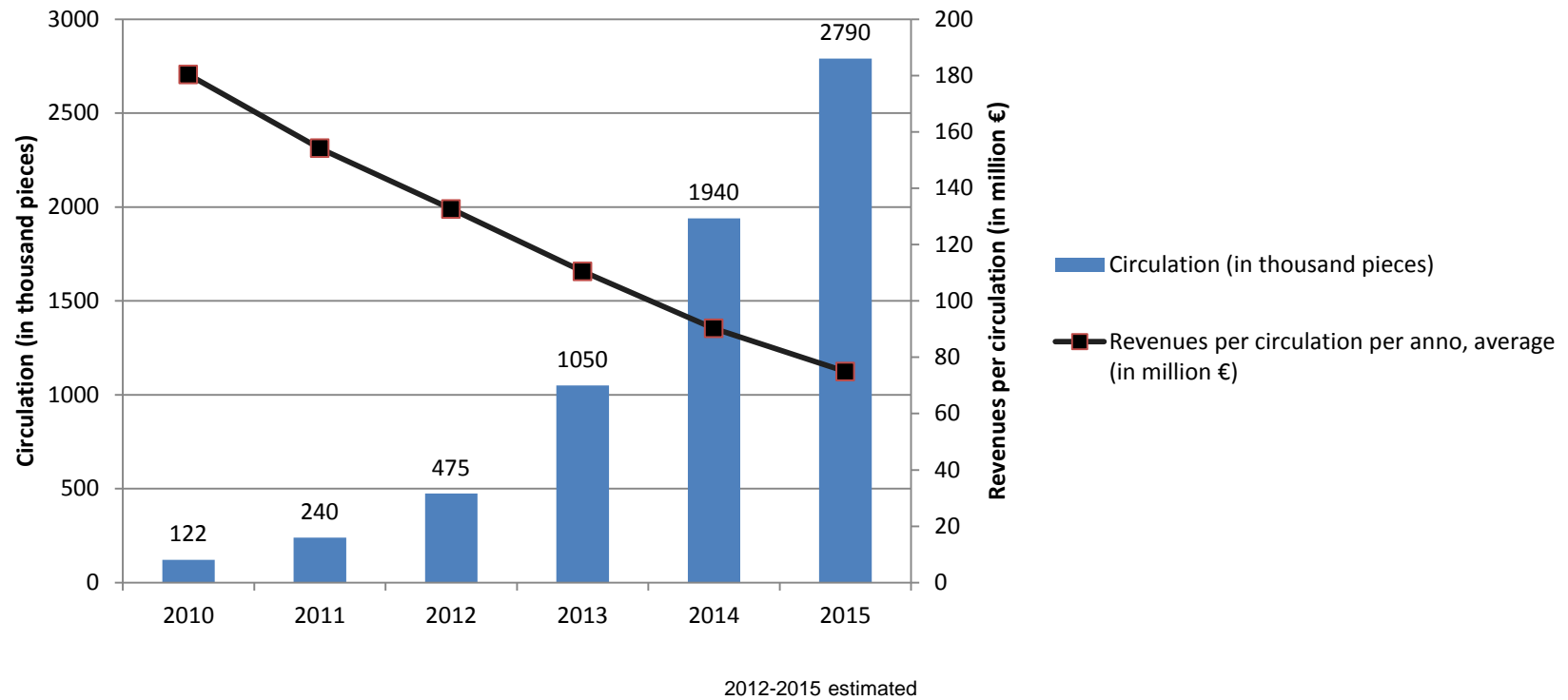
Regularly readers of newspapers



Circulation trend newspapers

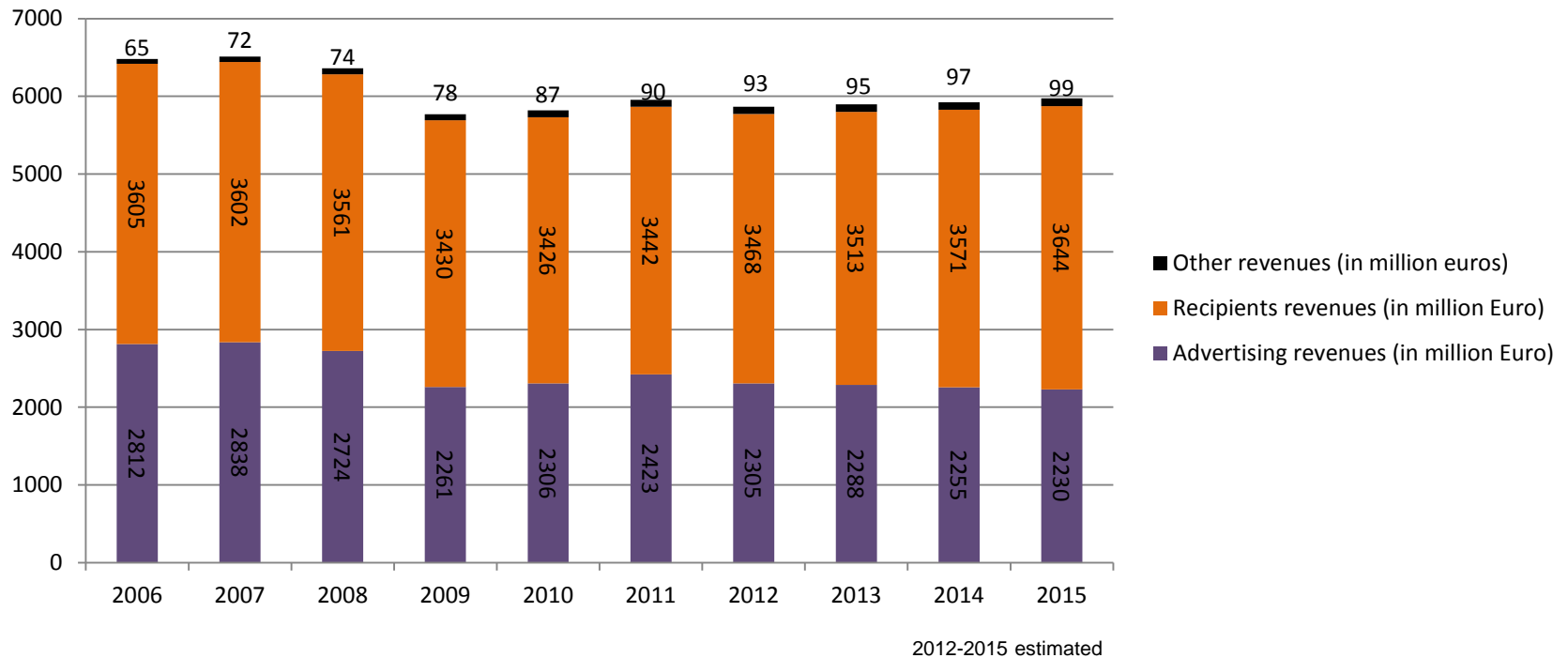


Revenue trend (recipients) digital newspapers

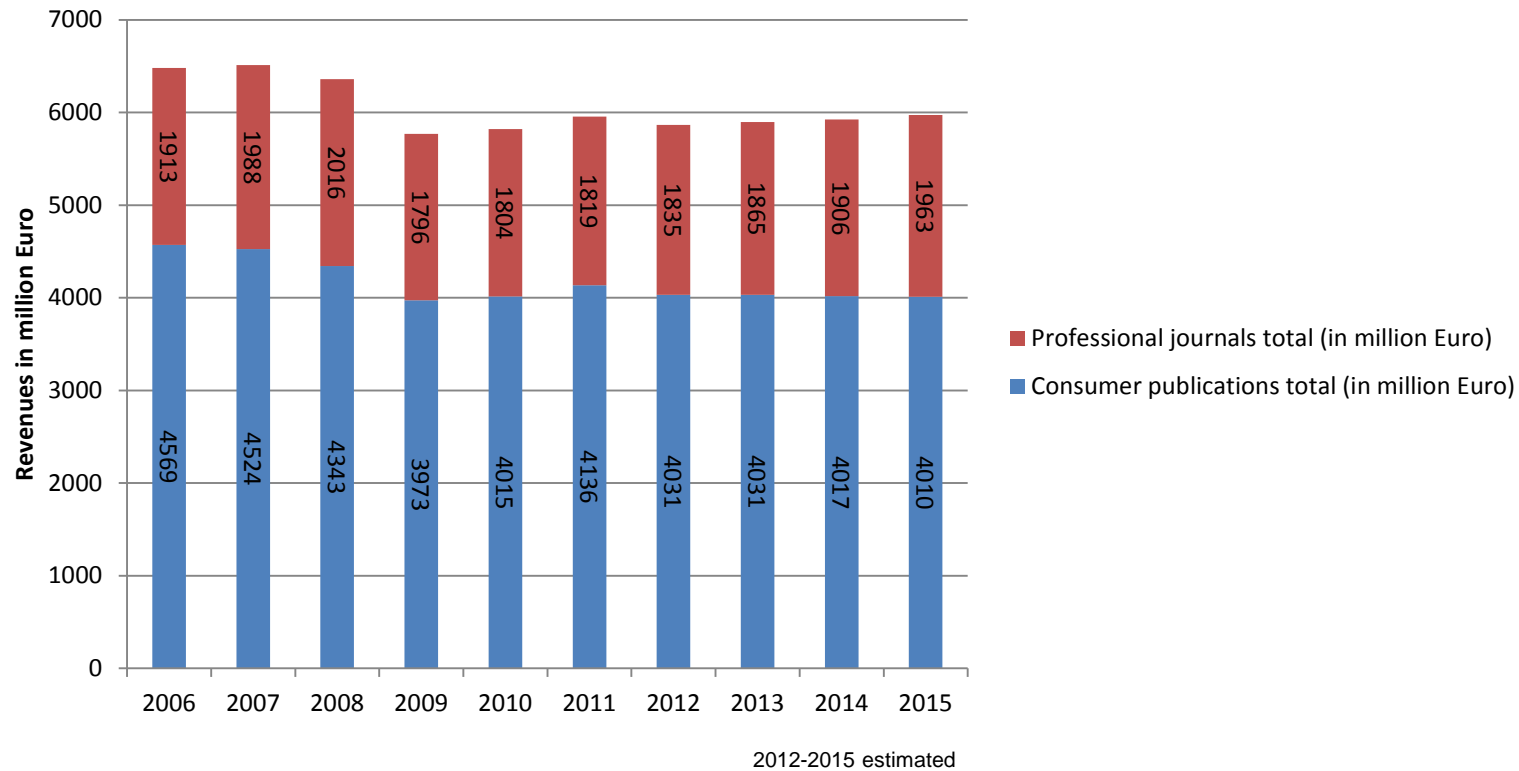


- TV and Radio Markets
- Newspaper Markets
- Magazine Markets
- Book Markets

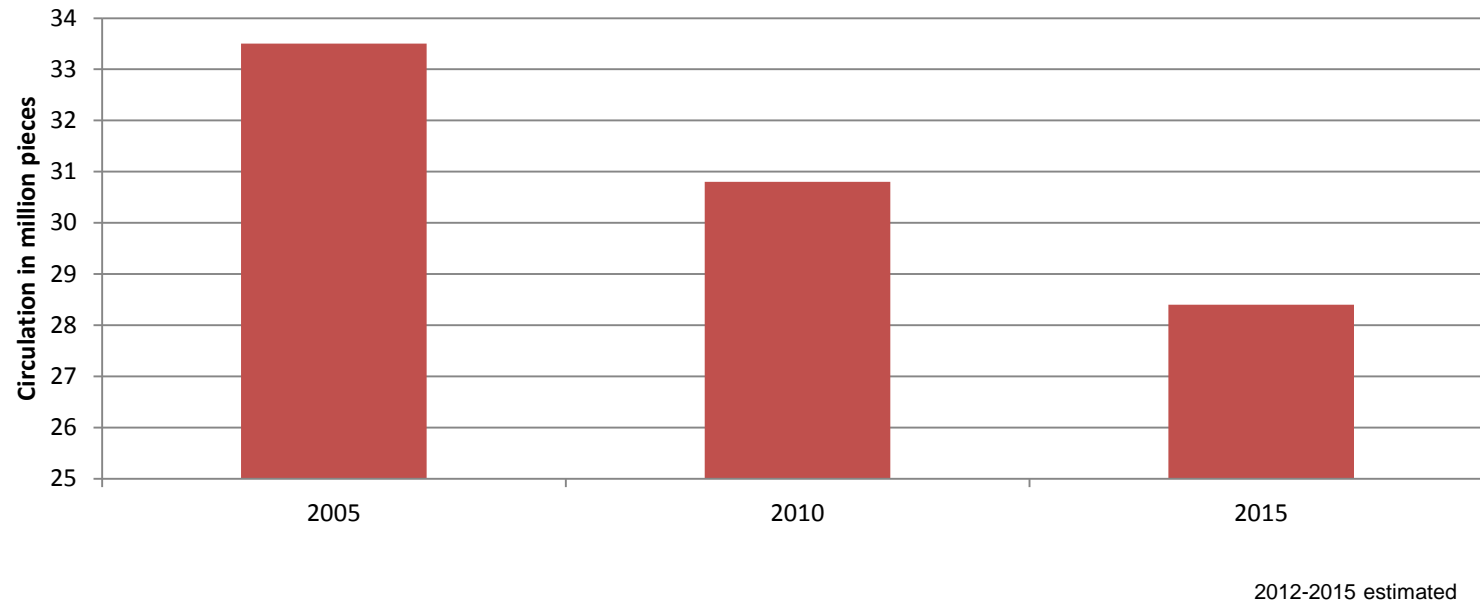
Revenue trend magazines



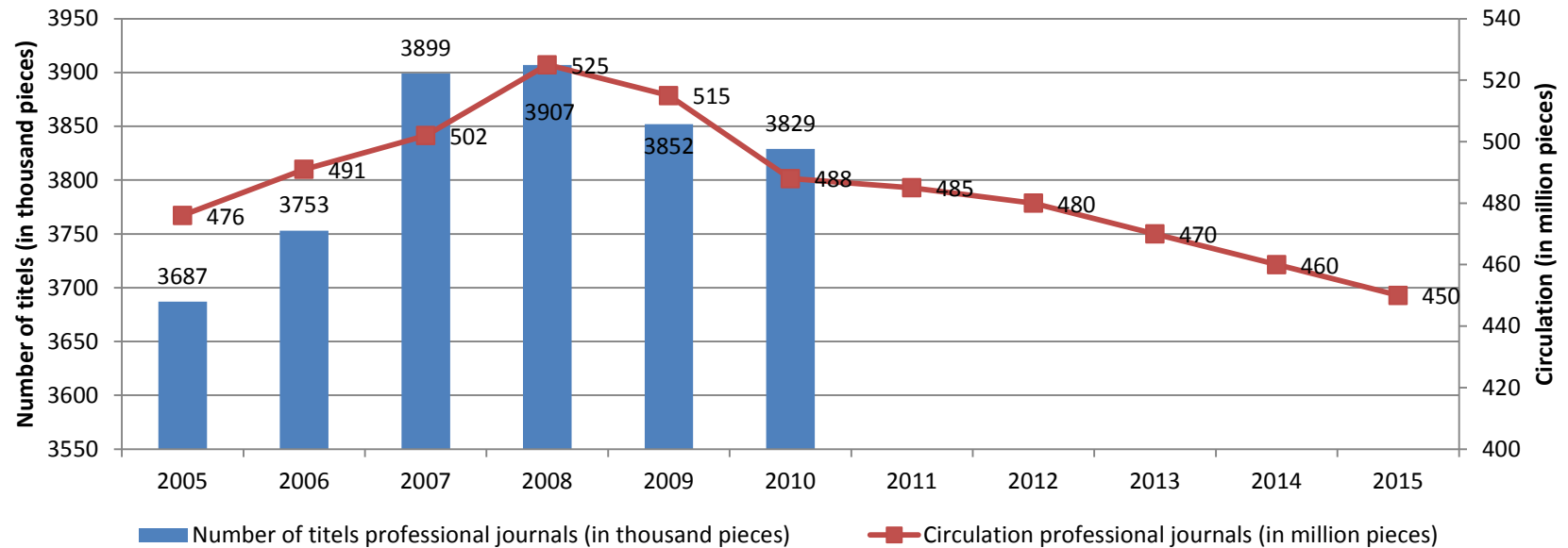
Revenue trend magazines



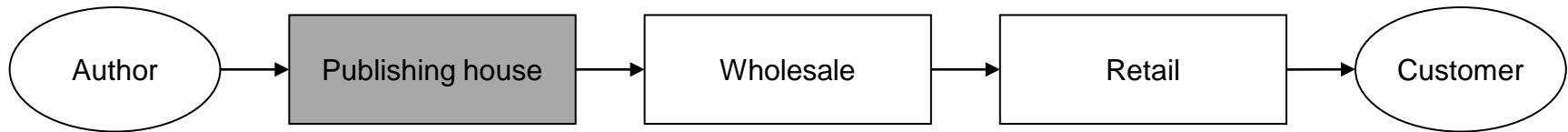
Circulation trend magazines (consumer publications)



Circulation trend magazines (professional journals)

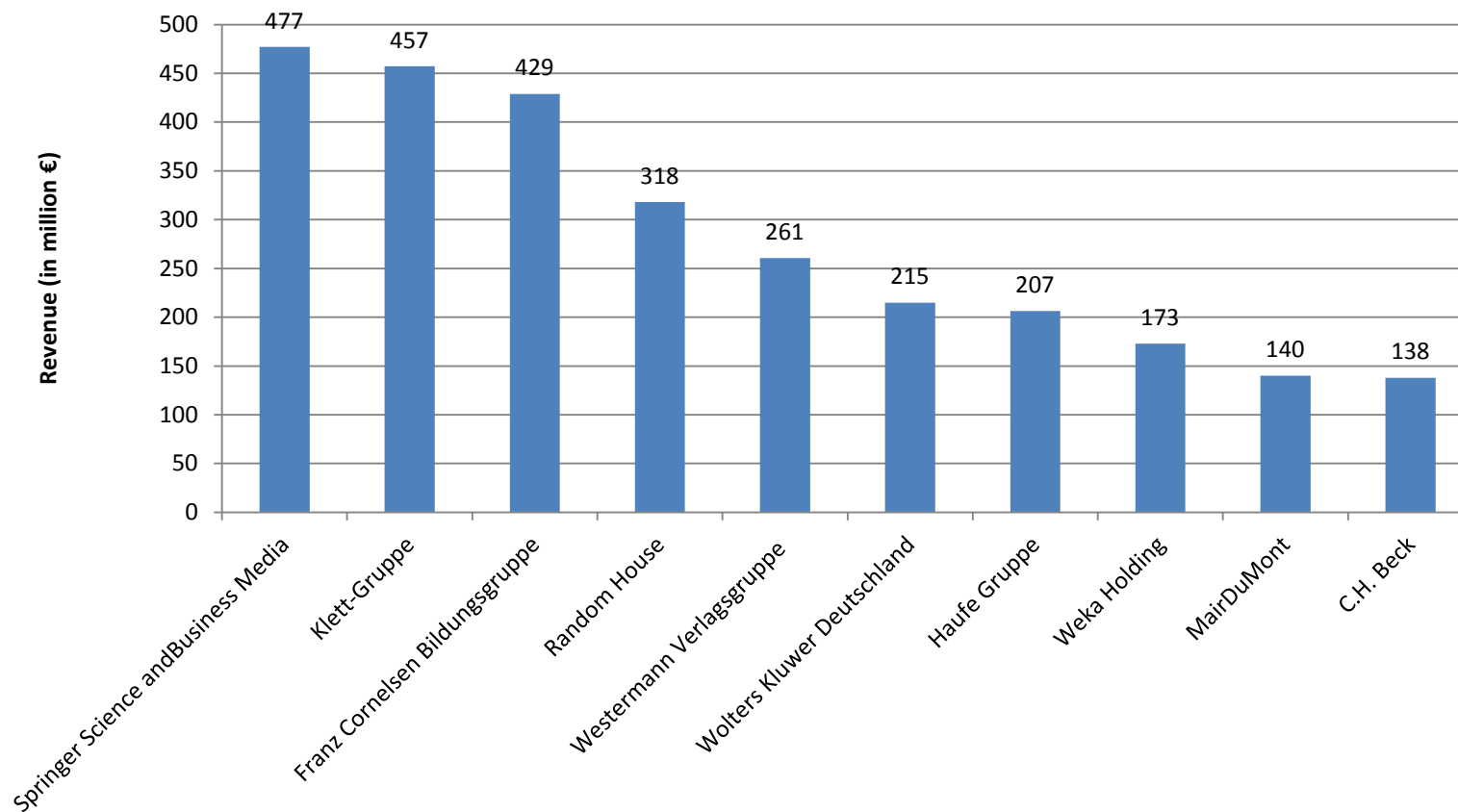


- TV and Radio Markets
- Newspaper Markets
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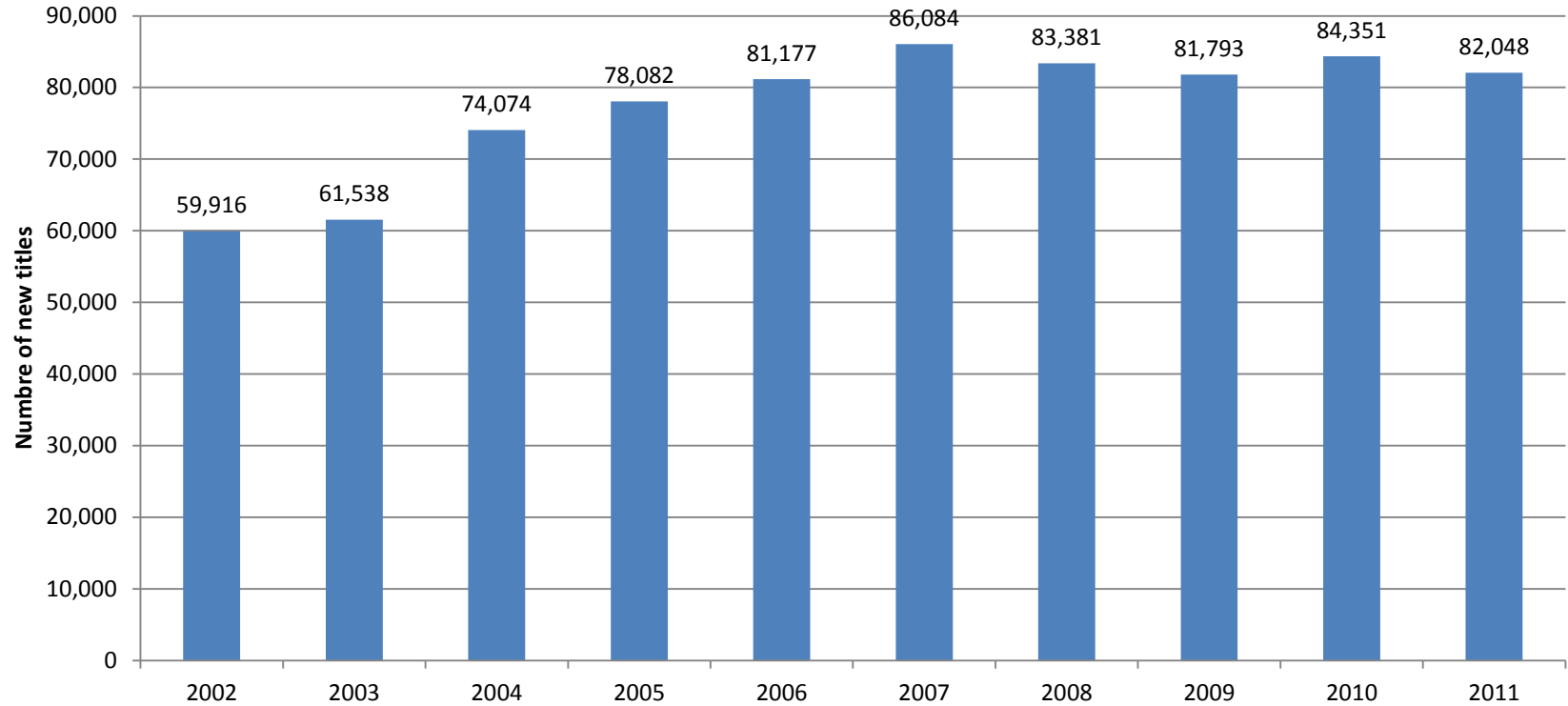


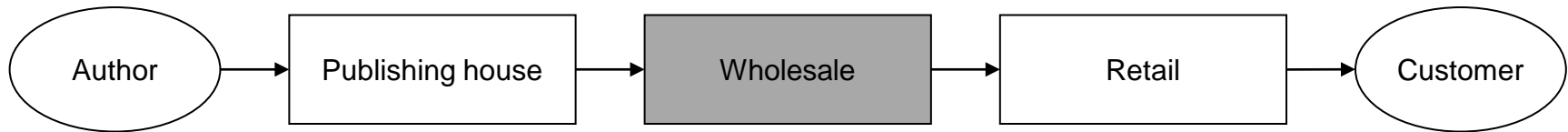
- Number of publishing houses in Germany (estimated): 15,000
- Number of publishing houses counted by Federal Statistical Office: 2,900
- Numbers of publishing member of the German Publishers and Booksellers Association: 1,800

The 10 biggest German publishing houses (2011)



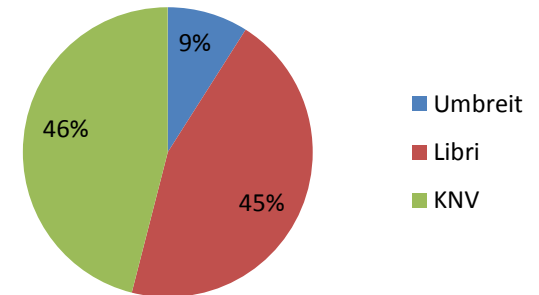
New book titles trend





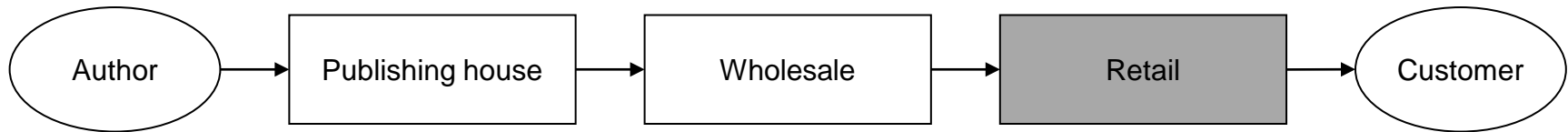
- Type 1 (“Barsortiment”):
 - operates for it’s own account an at it’s own name
 - Operates on own risk
 - Selects titles depending on experiance values
 - About 500,000 titels are supplieable overnight
- Type 2 (“Verlagsauslieferung”):
 - operates on behalf of the publishing houses
 - Does not operate on own risk
 - Has all titles of the contracted publishing houses in stock

Market share wholesale (type 1) 2011

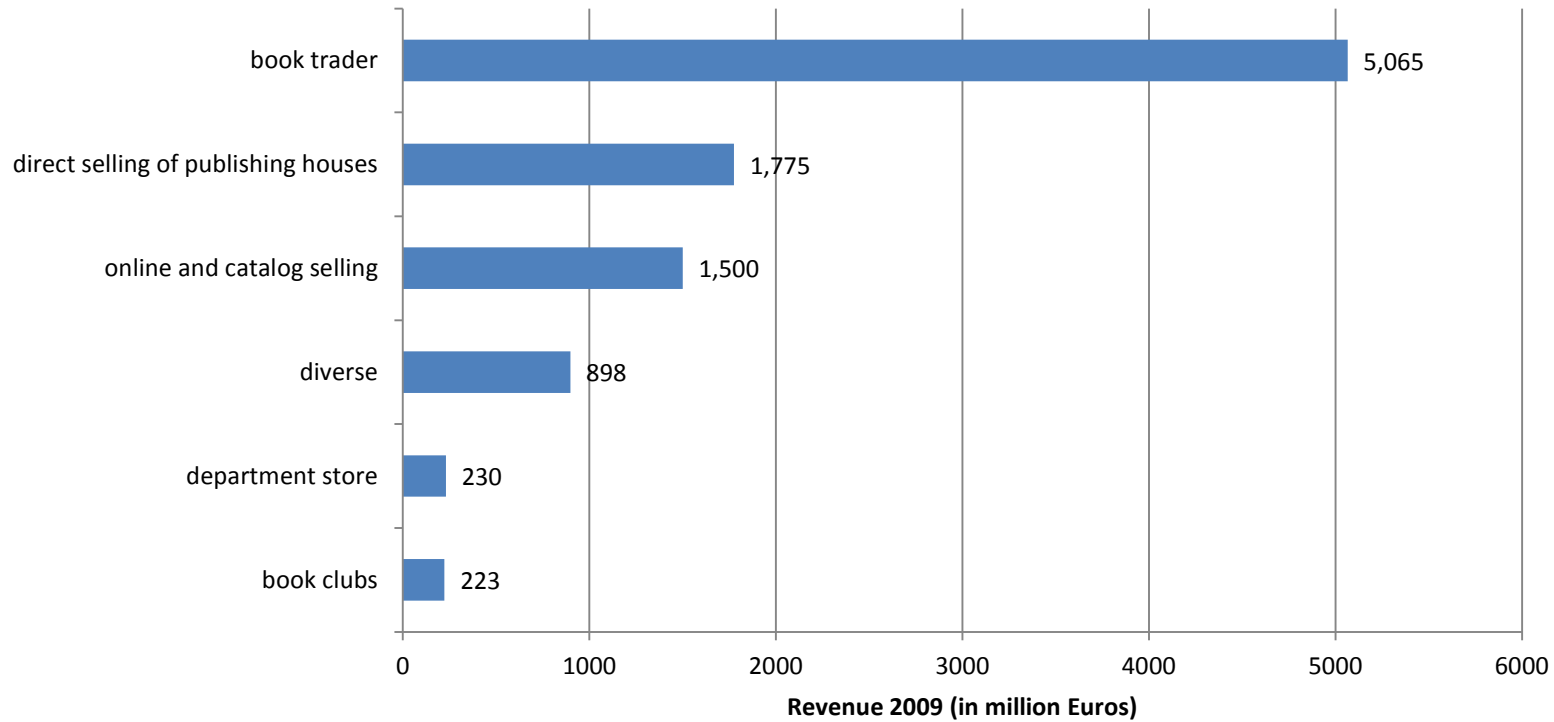


Market dominating according to German antitrust law:

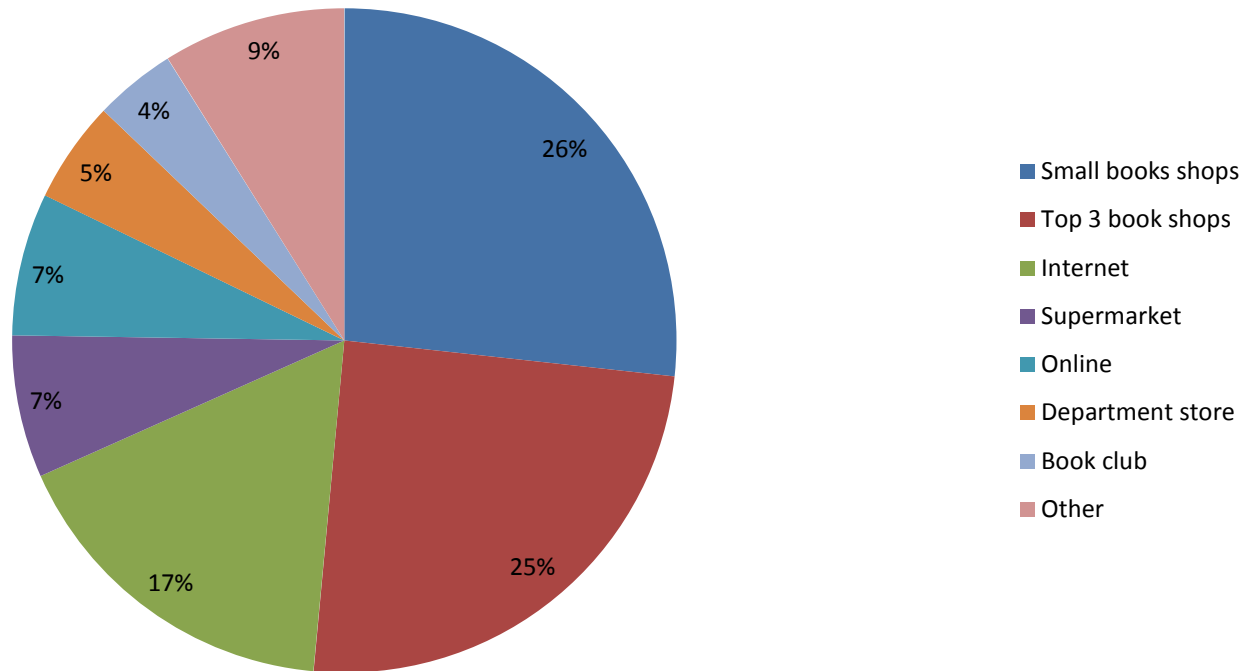
- CR1 > 33 % market share
- CR3 > 50% market share
- CR5 > 66 % market share



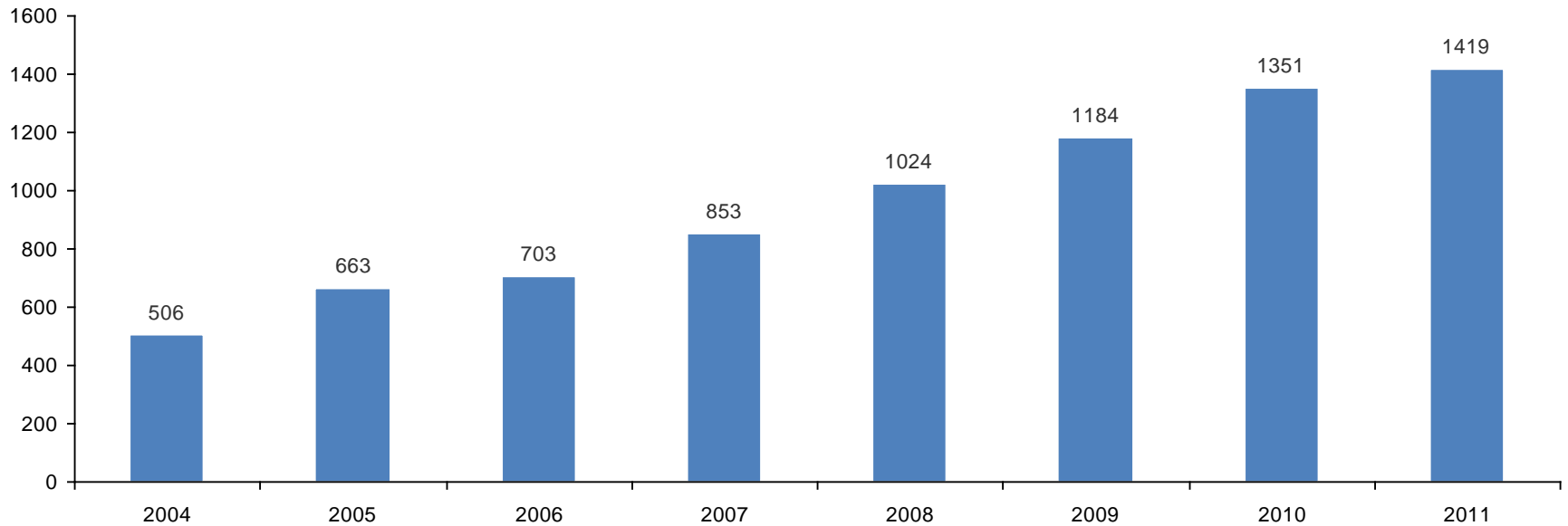
- Retail bookshops
- Department stores
- Catalogue selling
- Antiquarian bookshops
- Special bookshops
 - Book shops in railway stations
 - Book clubs
 - Secondary markets



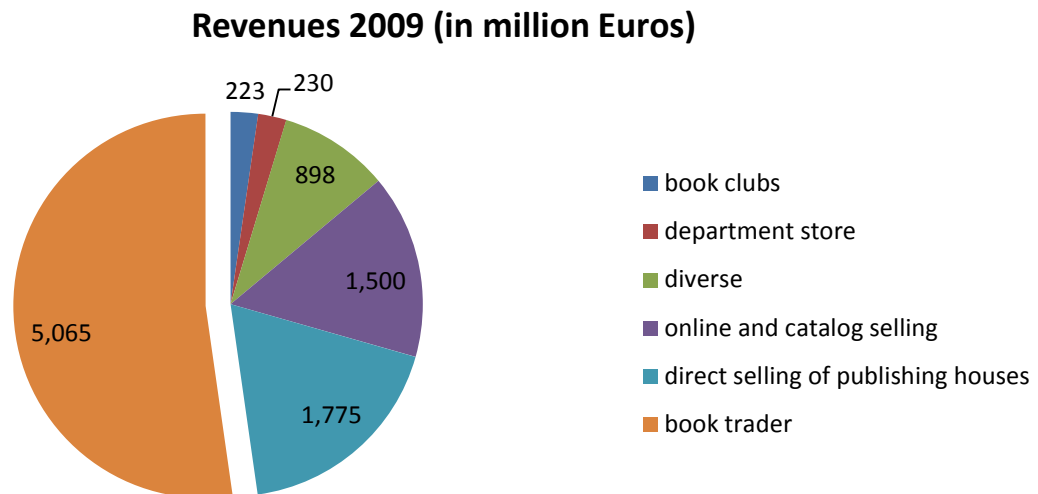
Where Germans prefer to buy their books (2011)



Revenue trend online book selling in mio €



- Kind of shops
 - General assortment (wide assortment)
 - Specialized assortment (deep assortment: scientific books, special interests)
- Trends (general assortment shops)
 - Step 1: large area bookshops
 - Step 2: downsizing as well as non-book assortments (toys, paper, cookies,...)



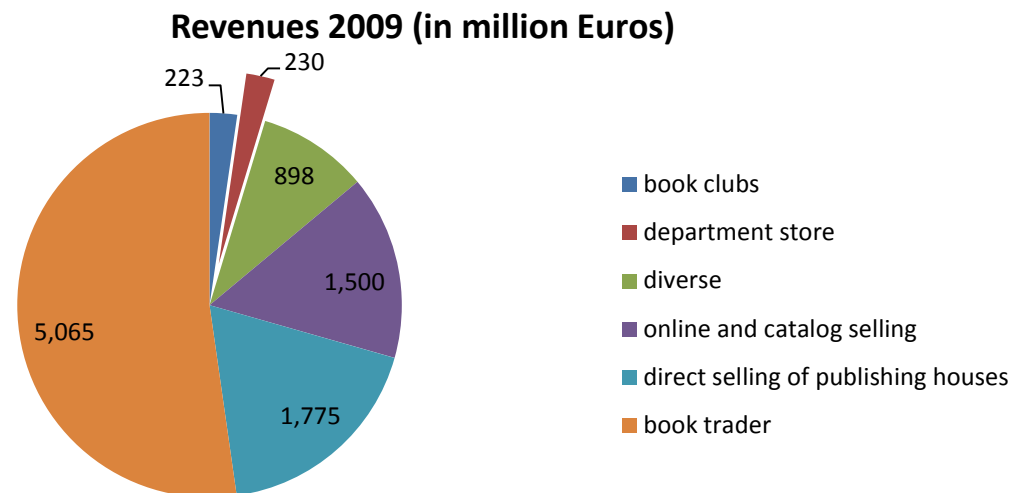
Retail bookshops



Retail bookshops



- Wide assortment
- Established titles
- Low-price titles

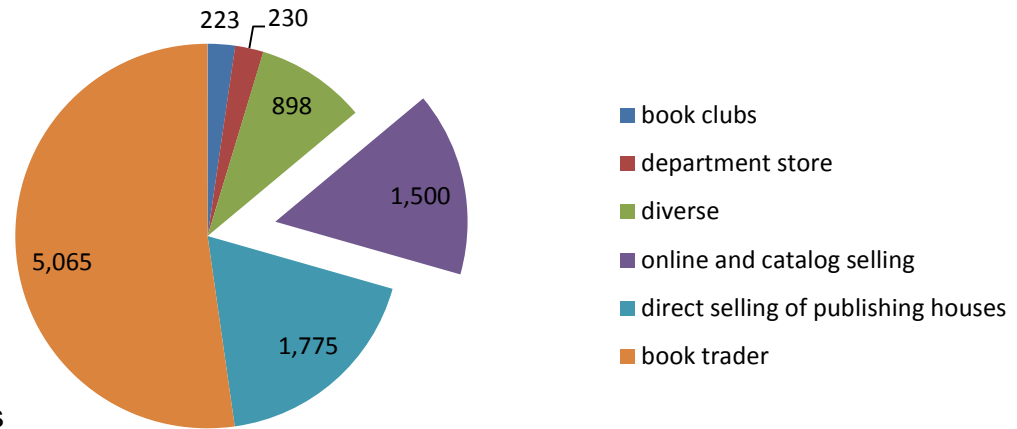


Department stores



- Electronic market places
 - Online warehouses, e.g. amazon
 - All kinds of goods
 - E.g. amazon.de, otto.de
 - Online book stores
 - Only books
 - E.g. libreka.de, buecher.de
 - Online book stores of traditional book stores
 - E.g. Thalia.de, rupperecht.de, hugendubel.de

Revenues 2009 (in million Euros)



- Digital marketplaces for ebooks (only digital goods), e.g. iTunes, PagePlace, textunes

Online warehouses

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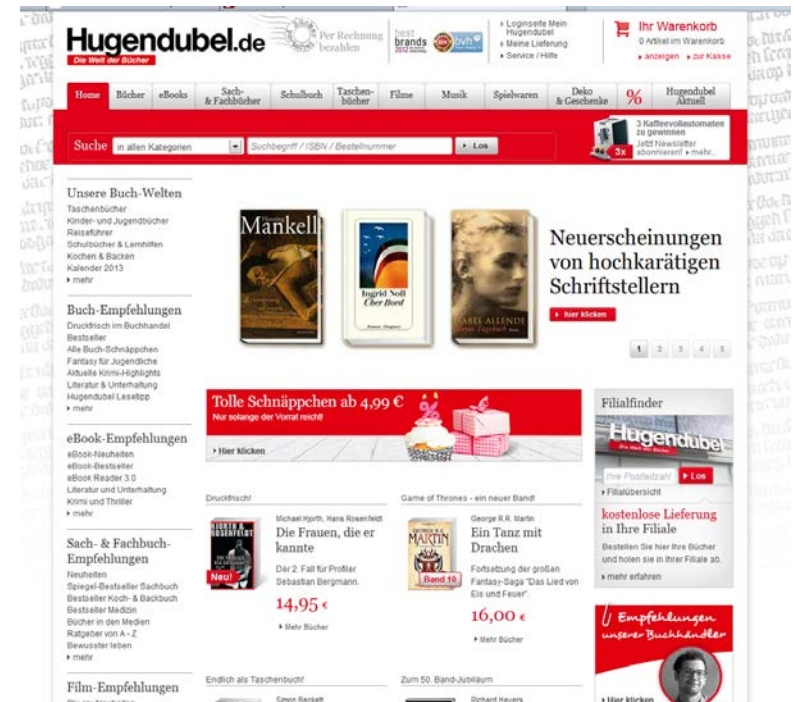
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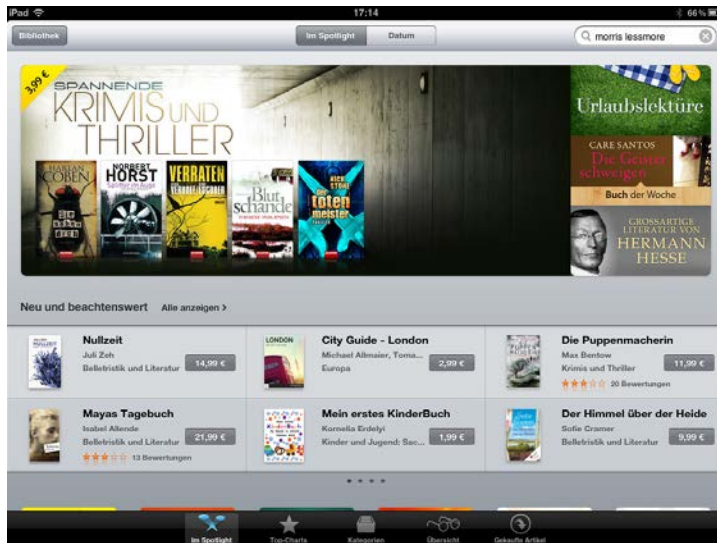
Themenwollen

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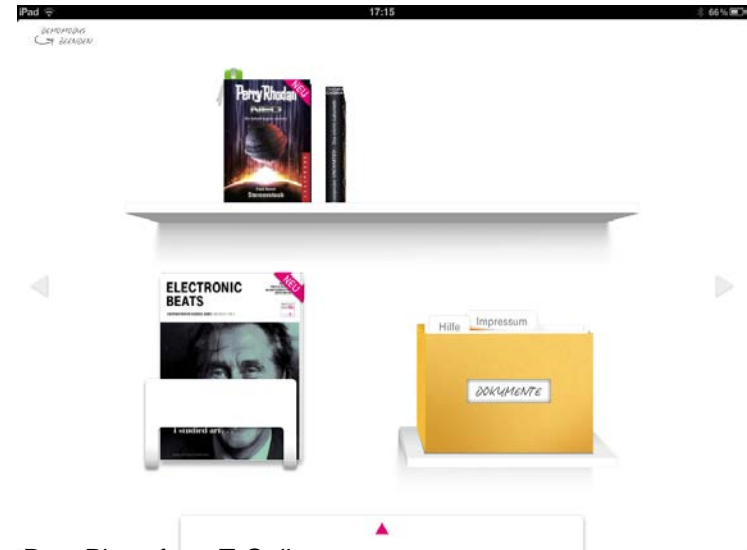
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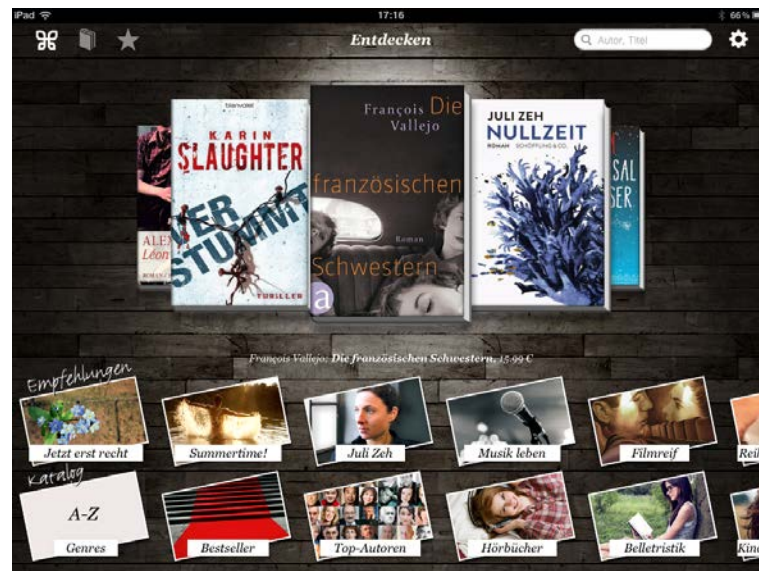
Digital market places



iTunes from Apple



PagePlace from T-Online

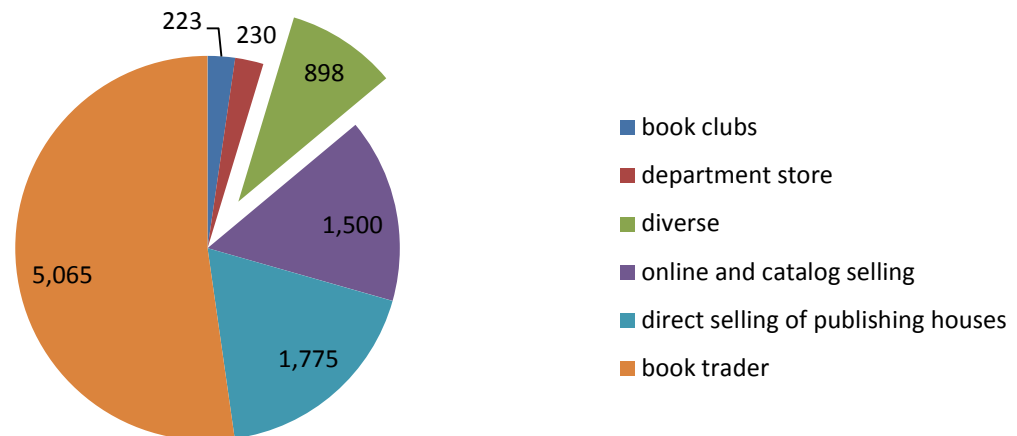


Textunes

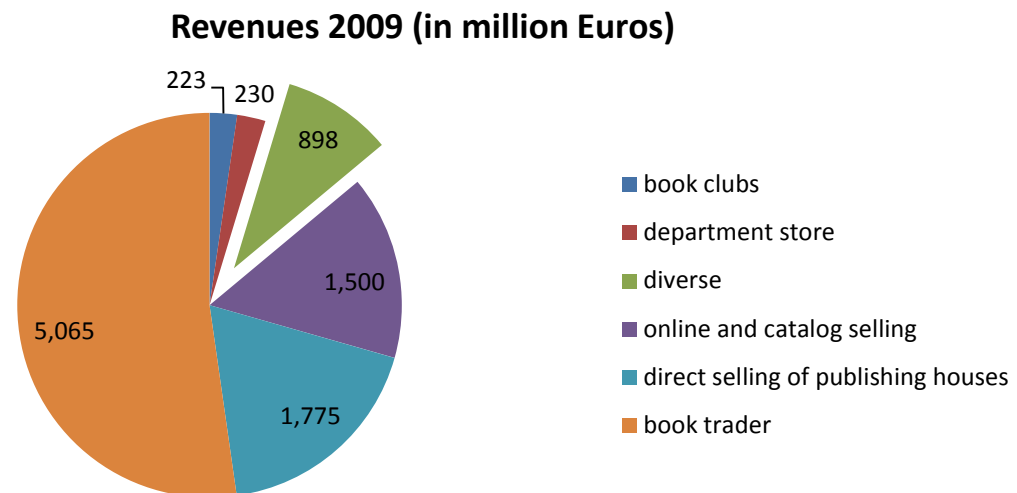
- Special status
 - Special opening hours
 - High lease costs
 - High payroll costs
- Also newspapers and magazines



Revenues 2009 (in million Euros)



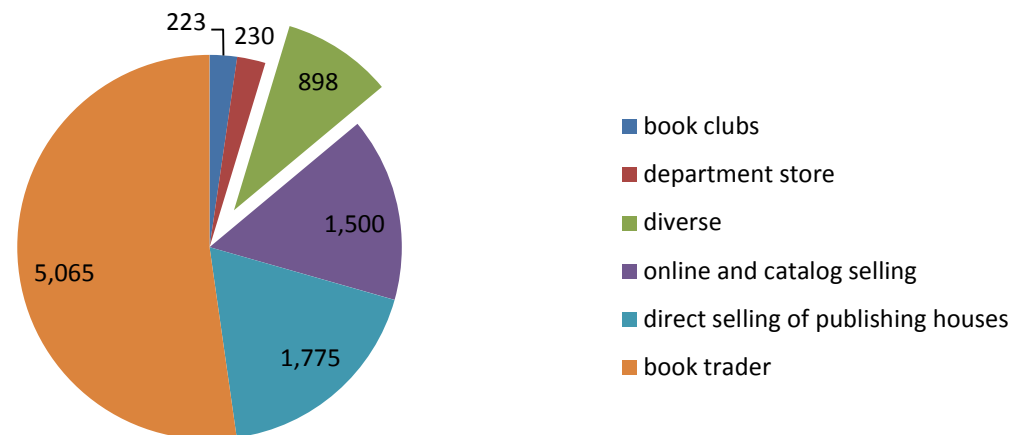
- No price fixation anymore
- Kinds of bookshops
 - Classical antiquarian bookshop: sells old books
 - Modern antiquarian bookshop: sells
 - rests of circulations
 - Extra editions
 - Remaindered books



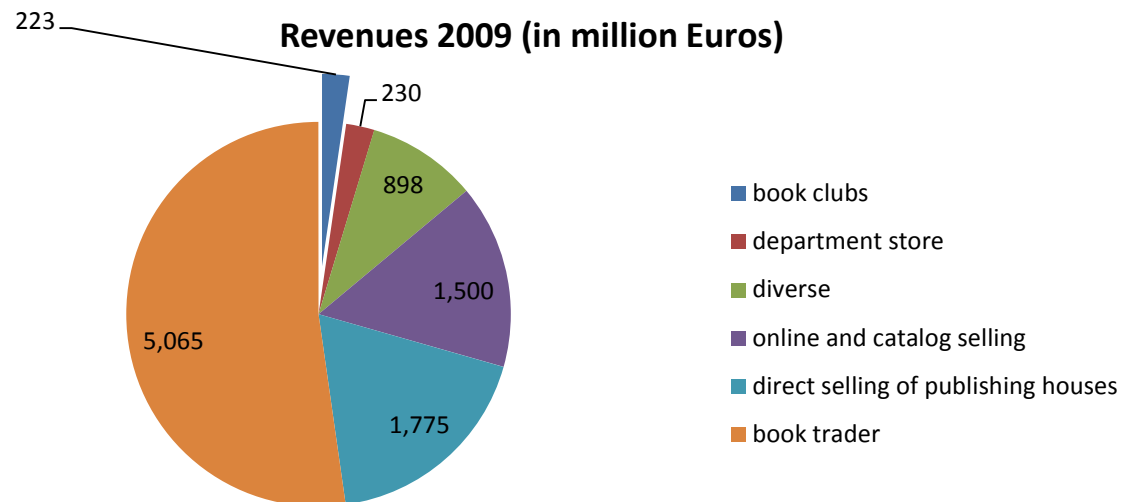
Books as additional assortment in supermarkets, drugstores etc.



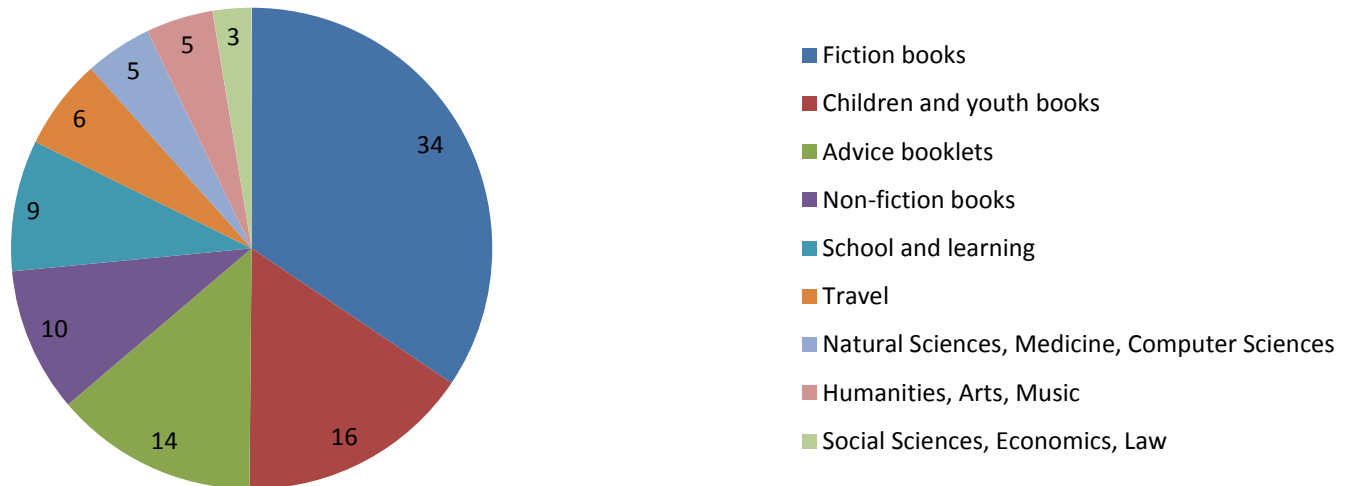
Revenues 2009 (in million Euros)



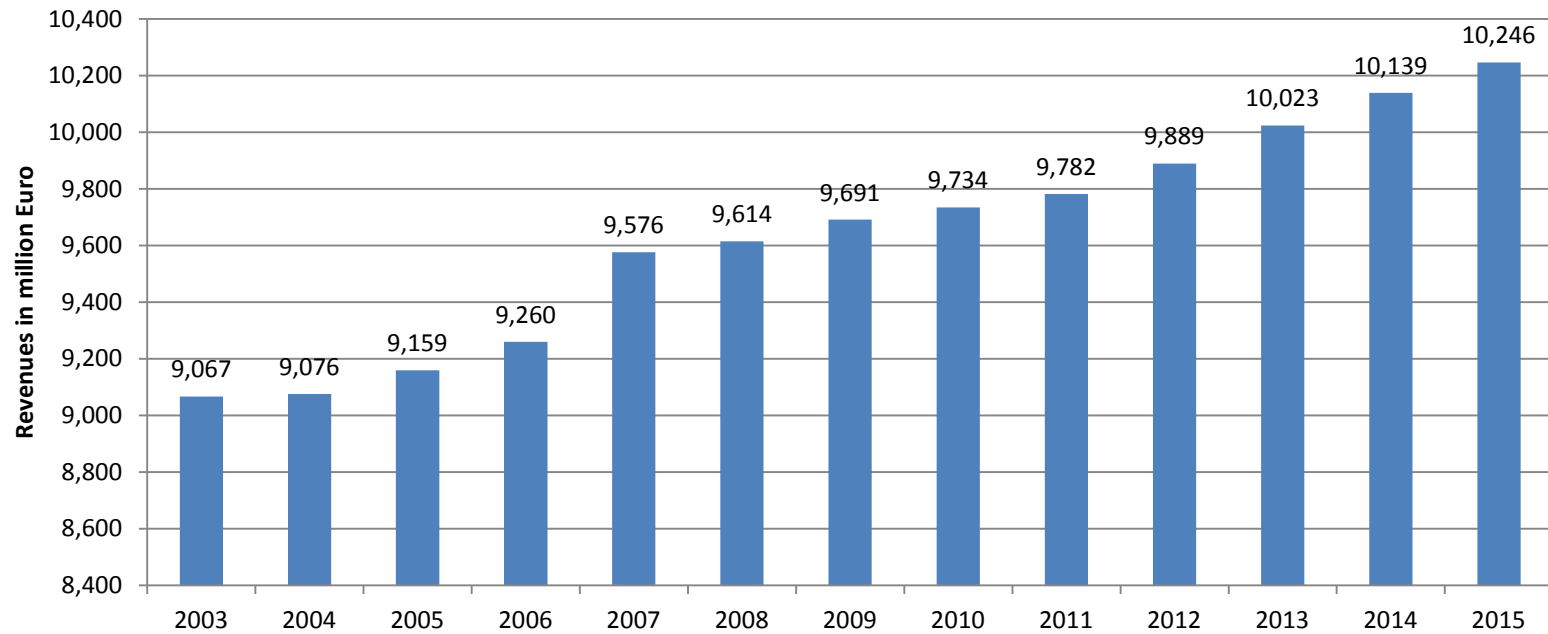
- Subscription model
- Customer
 - needs to be member of the club
 - Has to buy at least a certain number of books per time



Book revenues: trade groups (2011, in %)



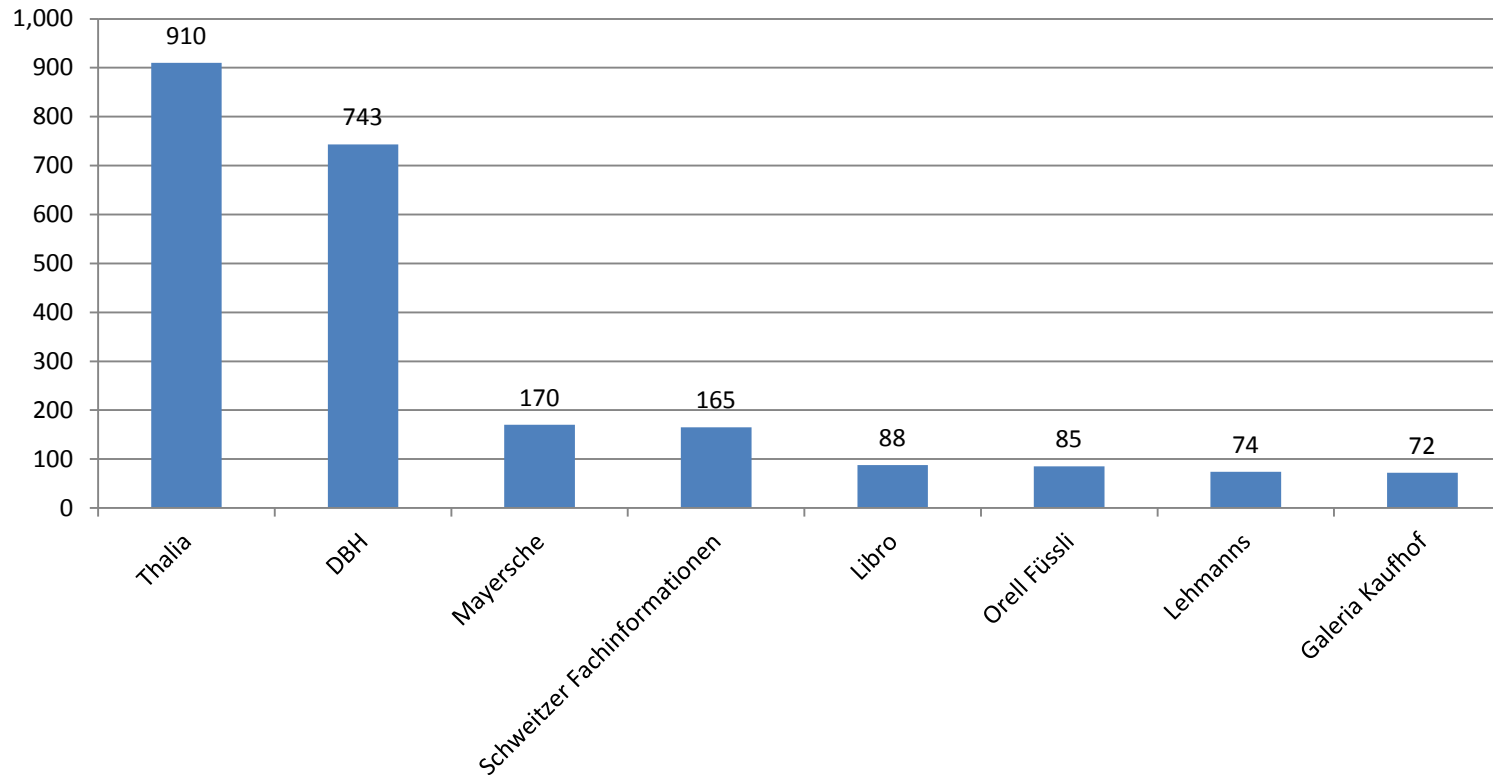
Revenue trend book market



2012-2015 estimated

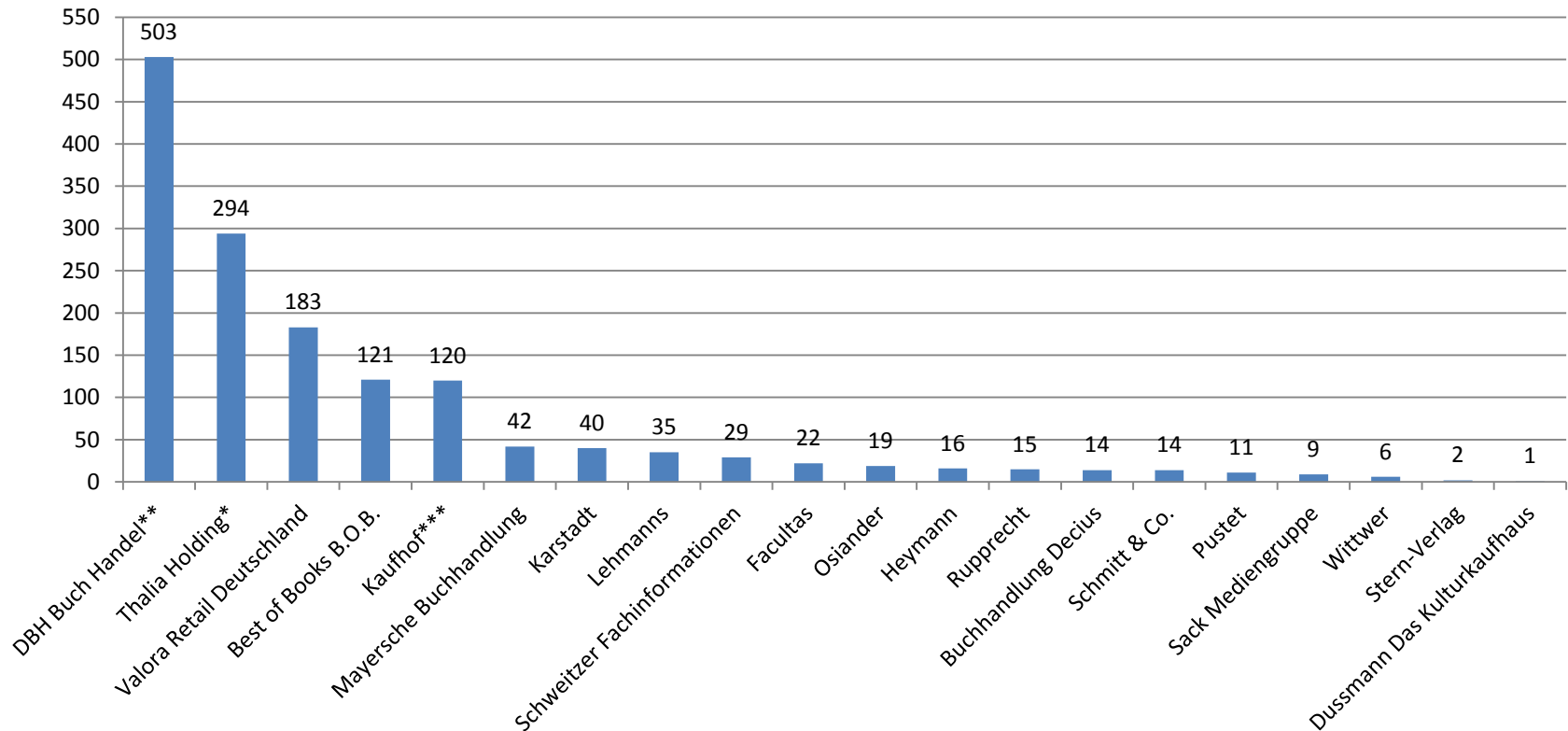
The biggest German book traders 2009

Revenues in million Euro (total 2,300 million Euro)



The biggest German book traders 2011

Number of shops

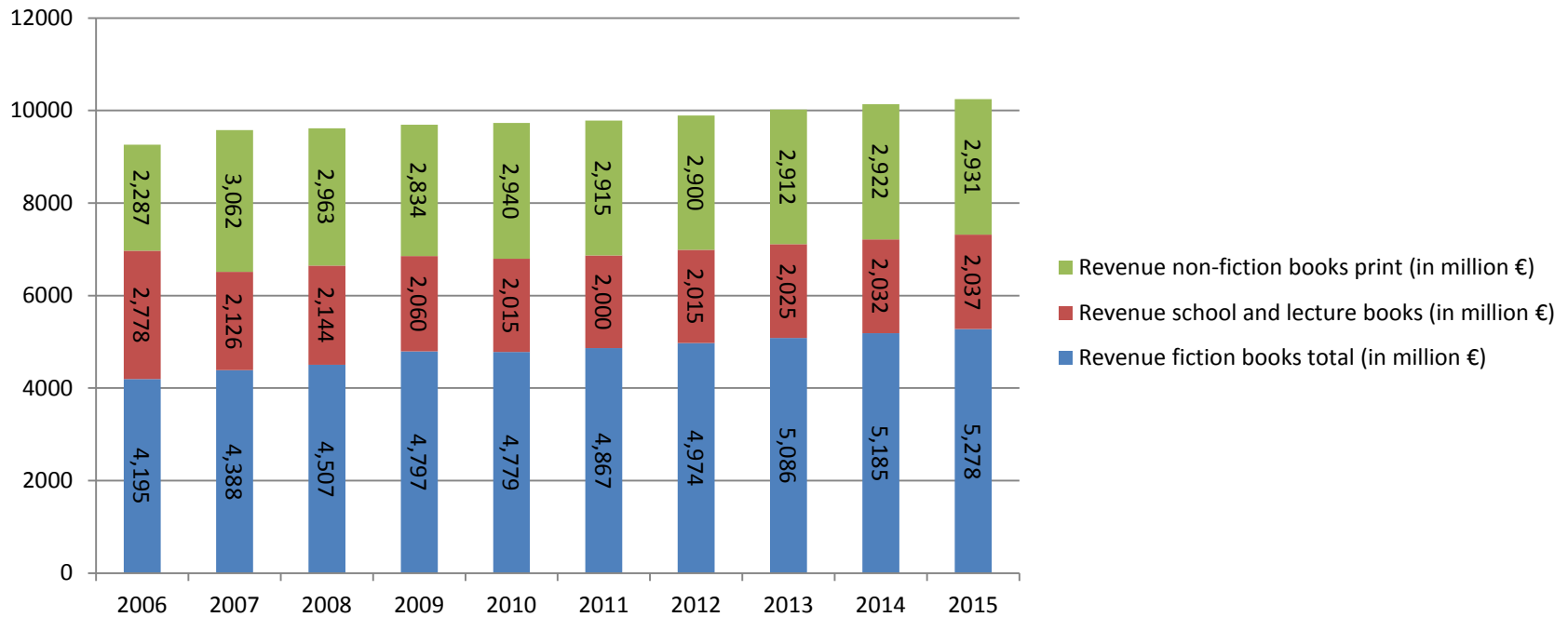


* Shops in Germany, Austria, Switzerland

** Includes the following labels: Hugendubel, Schmorl & v. Seefeld, Buch Habel, Weiland, Wohlthat'sche, Weltbild, Jokers.

*** Book part of the holding

Revenue trend books

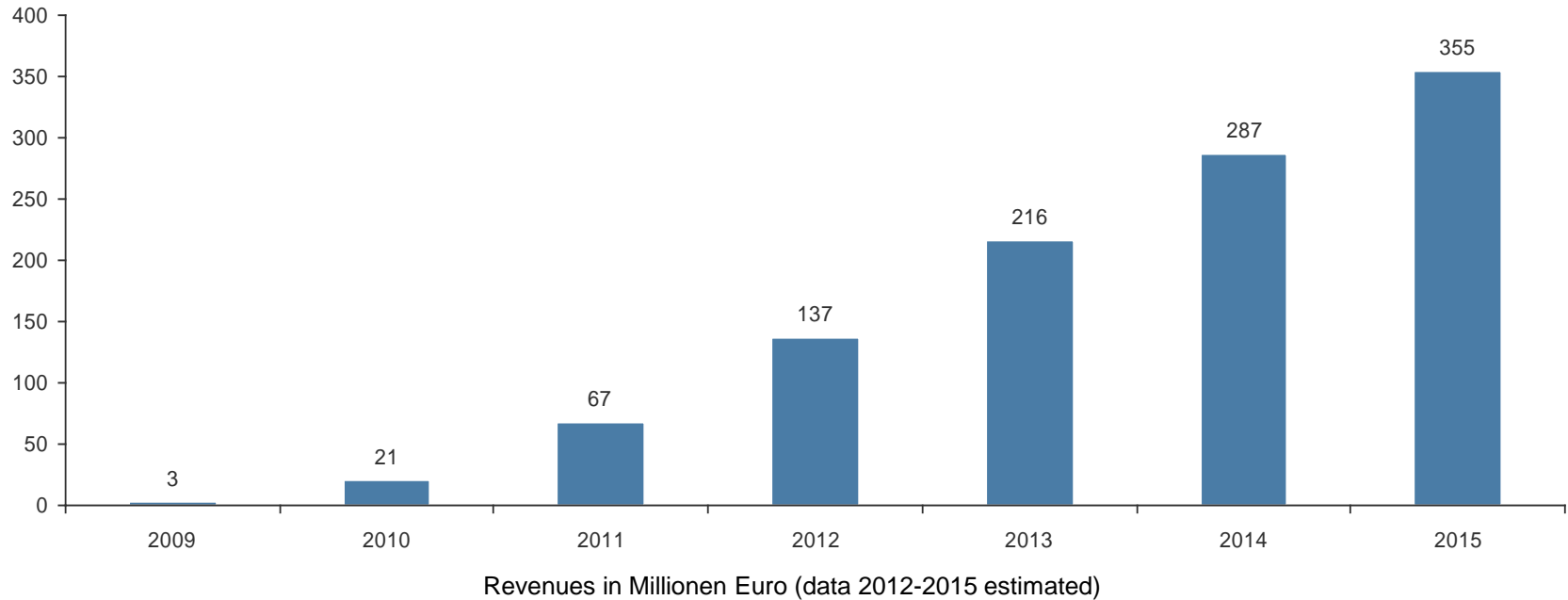


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- Markets for Specific Types of Media
- E-Publishing and Paid Digital Content
- Regulatory Aspects
- Innovative Business Models
- Results of a Survey: Crossmedia Publishing

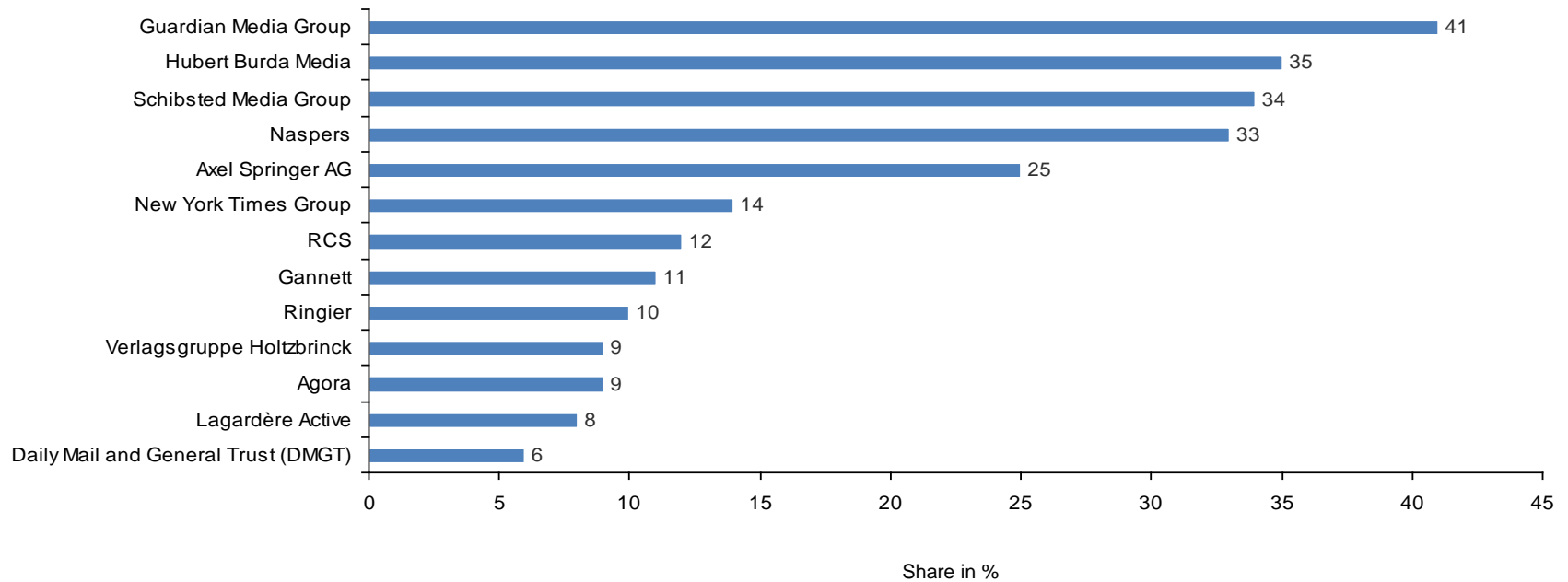
- Market Data E-Publishing
- Reader's behaviour
- Publishing Houses' behaviour
- Paid Digital Content and Services as a Challenge

	Values
Revenues in million €	38
Revenue trend (basis: 2010) in %	77
Sold ebooks in million	4.70
Ebook share of sales of total revenues in %	1

Ebook revenues fictional books



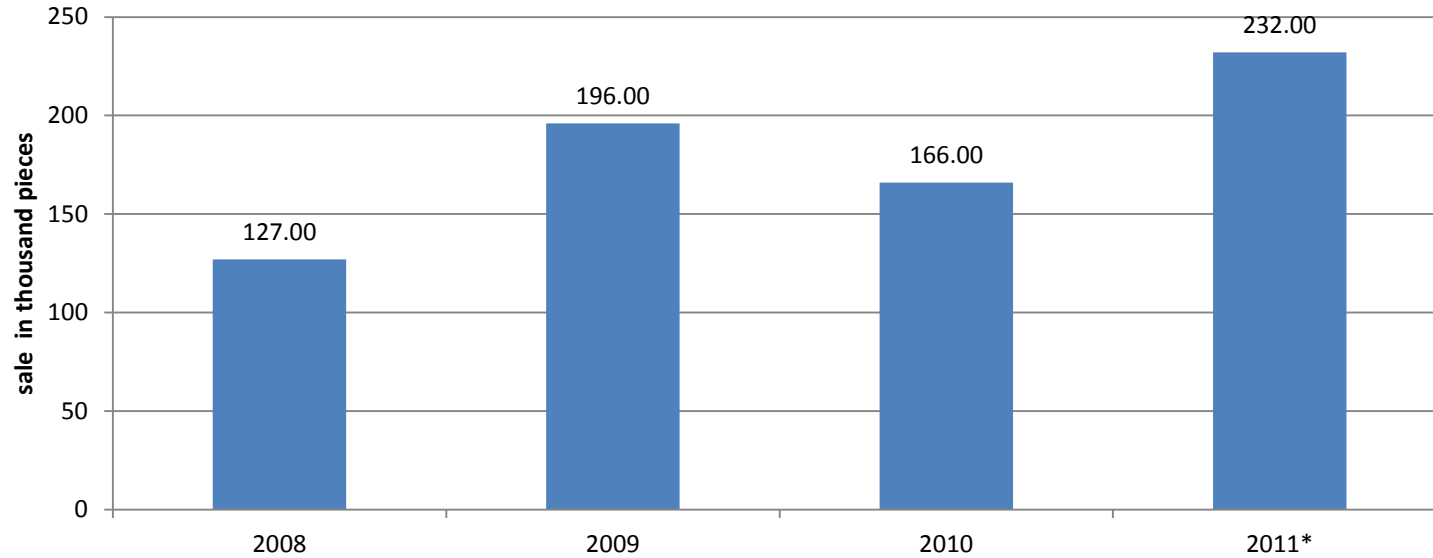
Sales share of digital products of selected publishers (2010)



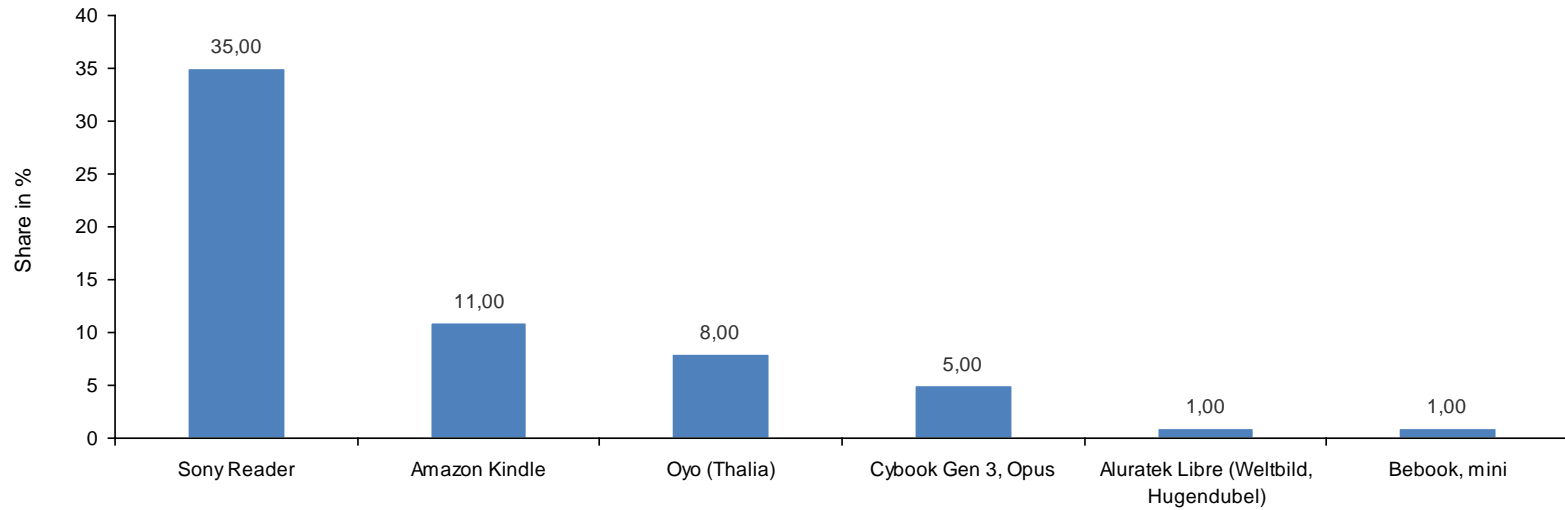
E-Book devices

	Kindle 4	Oyo 2	SONY PRS T1	Kobo Reade Touch	TouchMe	iPad	Samsung Galaxy
Date of appearance	2011	2011	2011	2011	2011	2011	2011
Manufacturer	Amazon	Thalia / Medion	Sony	Kobo	Thalia/Smartscreens	Apple	Samsung
Disitribution	Online via Amazon	Thalia Booktrader	Diverse shops	Diverse shops	Thalia booktrader	Diverse shops	Diverse shops
File transfer	WIFI, PC	WIFI, PC	WIFI, PC	WIFI, PC	PC	WIWI, 3G, PC	WIWI, 3G, PC
File formats	AZW, TXT, PDF, unprotected MOBI, PRC, HTML, DOC	EPUB, PDF, TXT, HTML	EPUB, PDF, TXT, HTML	EPUB, PDF, MOBI, PDF, TXT, HTML, RTF, CBZ, CBR	ePub, PDF, Mobi, HTML, TXT, PDB, RTF, LRC, FB2, TVT, MPG, AVI	via Apps every format possible	via Apps every format possible
Shopping facilities	Amazon kindle store	via WIFI at Thalia.de and via PC at every independent	via WIFI at the Sony e-book store and via PC at every independent	at the Kobo e-book store and at every independent	via WIFI at Thalia.de and via PC at every independent	Every online bookstore	Every online bookstore
Operation	10 physical buttons	Touchscreen, 4 physical Buttons	Touchscreen and 5 physical buttons	Touchscreen and 5 physical buttons	Touchscreen and 4 physical buttons	Touchscreen and 3 physical buttons	Touchscreen and 3 physical buttons
Additional functions		MP3 player	MP3 player	MP3 player	MP3 Player	MP3 player, camera, videos	MP3 player, camera, videos
Price in Euro	99	139	149	139	60	500 - 800	460-630

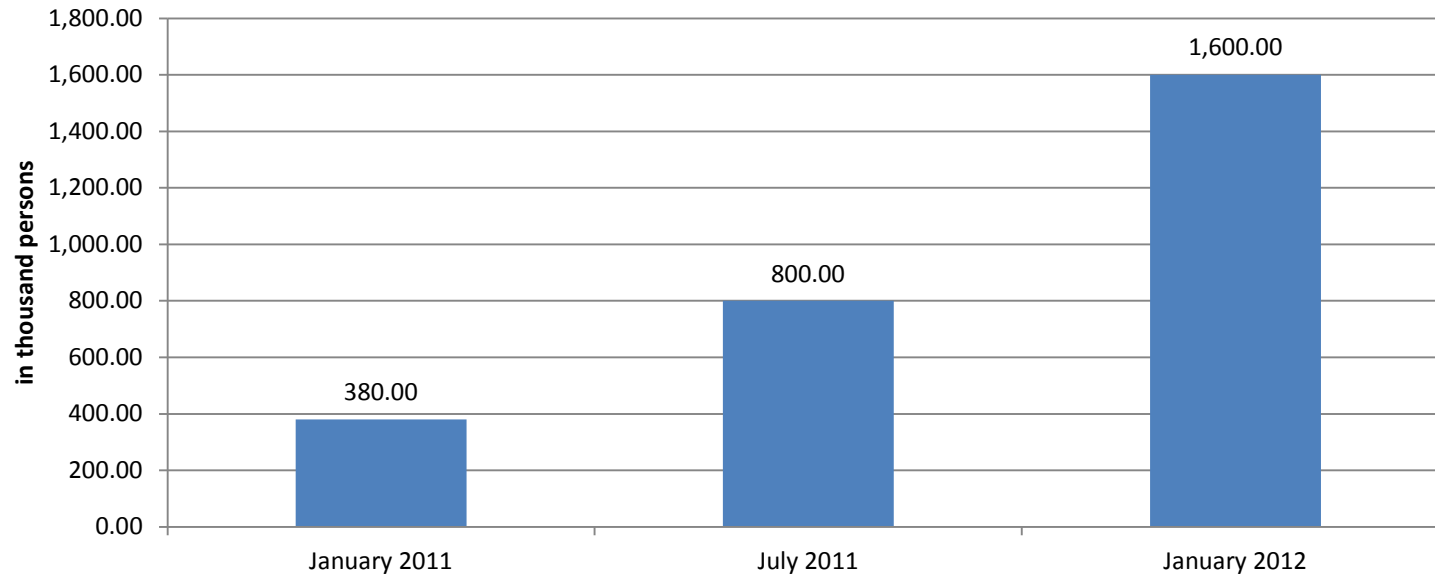




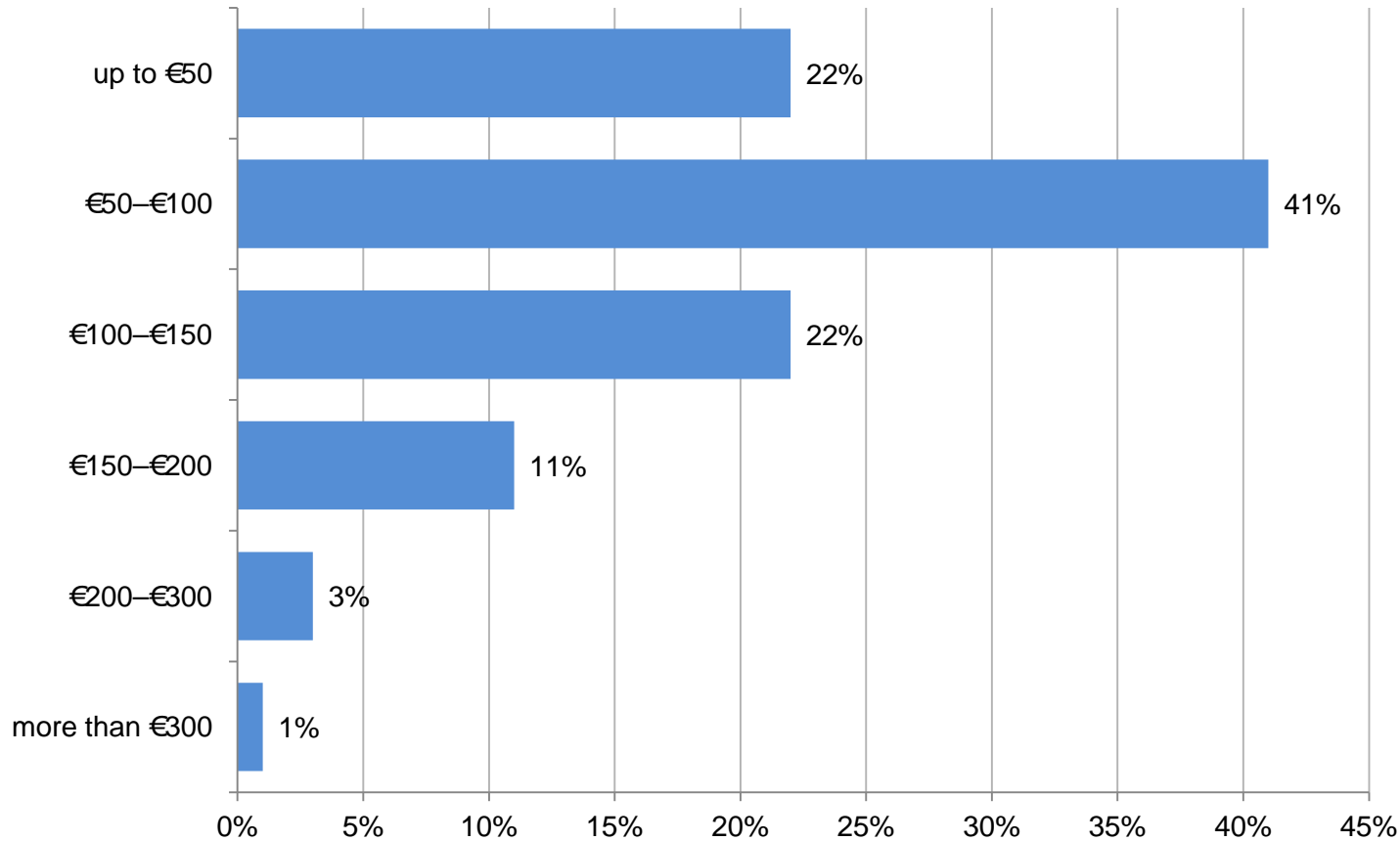
Ebook reader market share



Number of persons who own an ebook reader

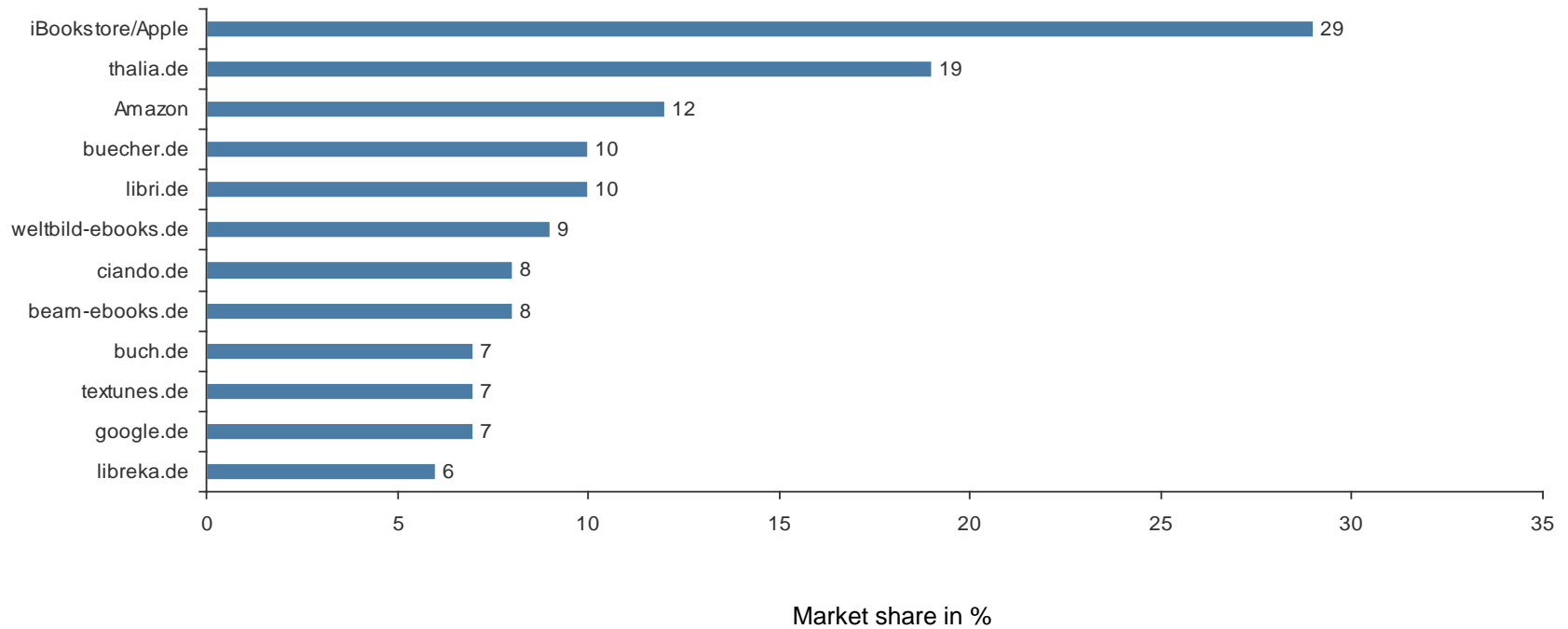


Willingness to pay for an ebook reader (2011)



Average price of an ebook reader: 135 €

Market share of ebook download platforms (2011)

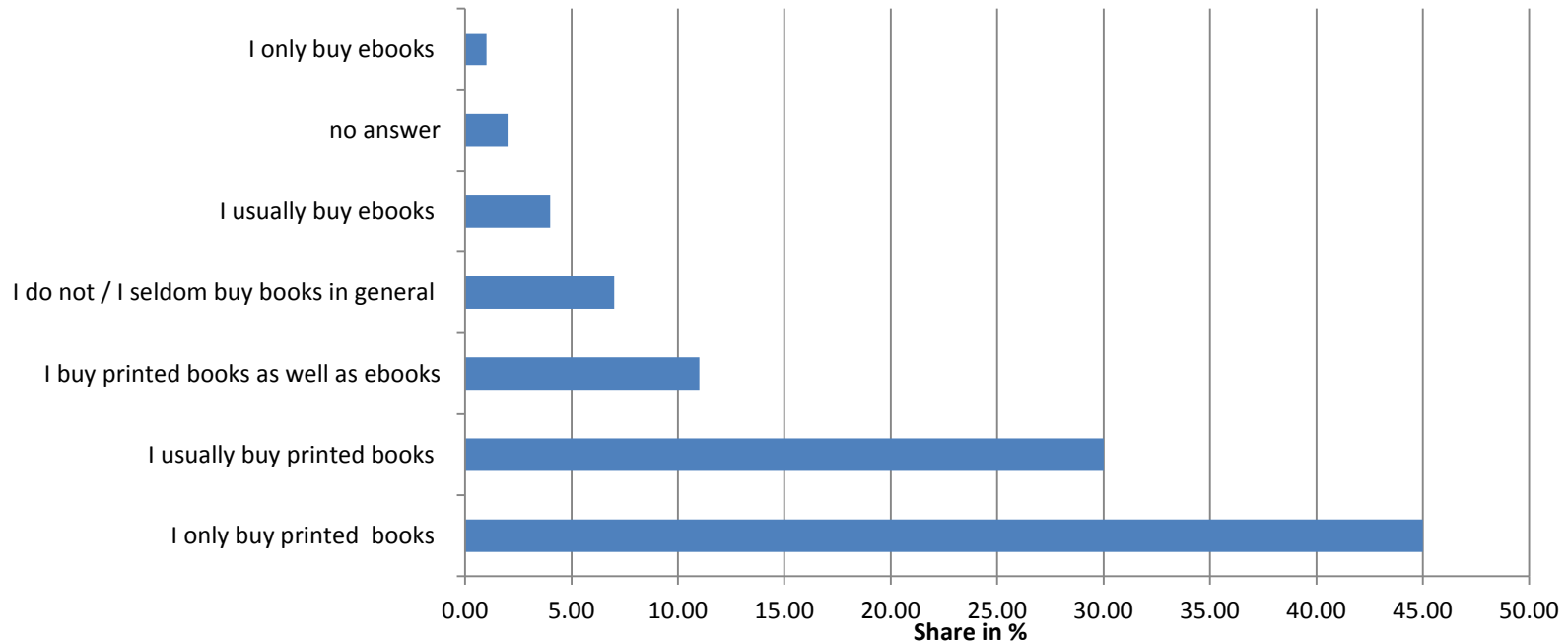


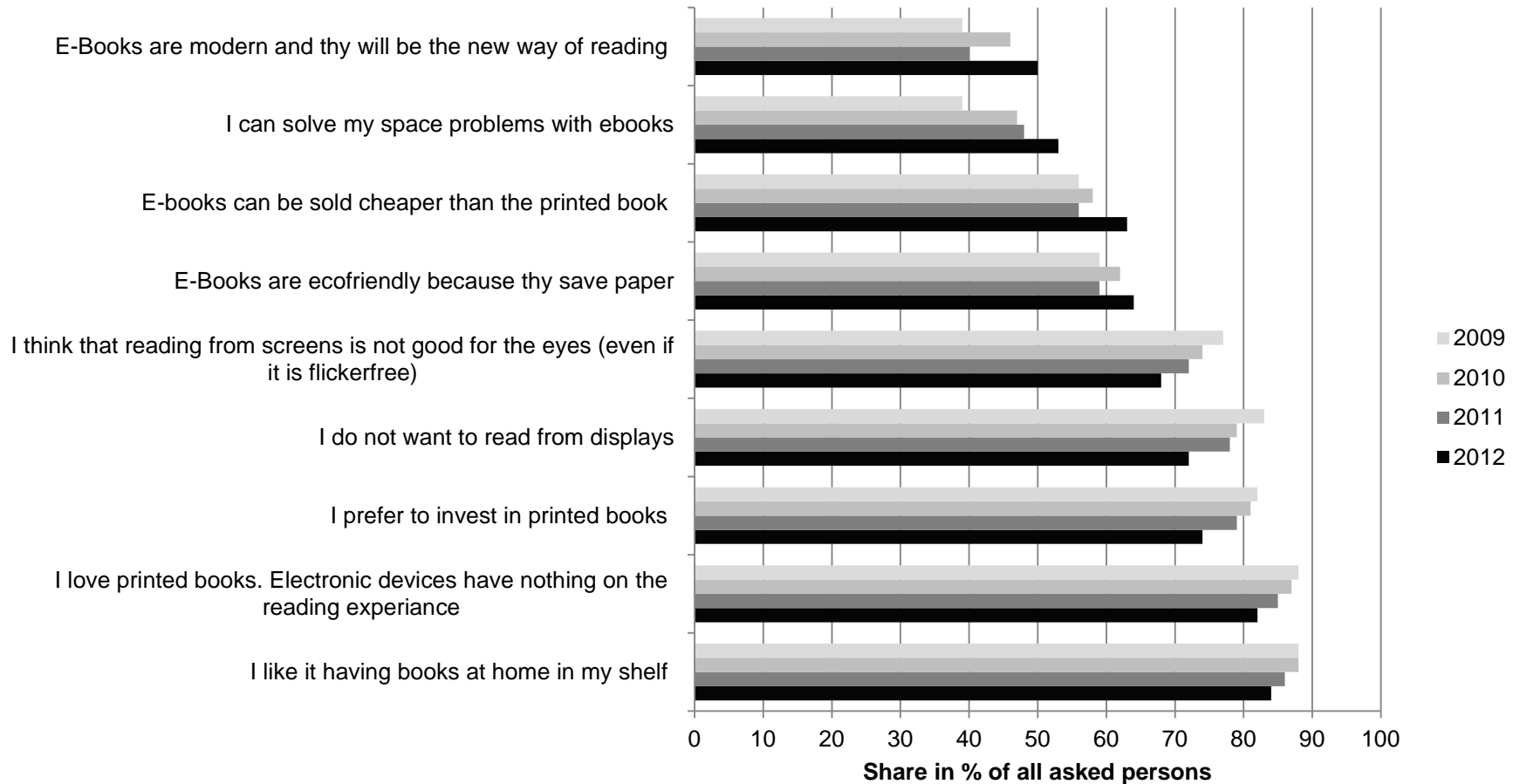
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Knowledge about ebooks and ebook readers (2010)

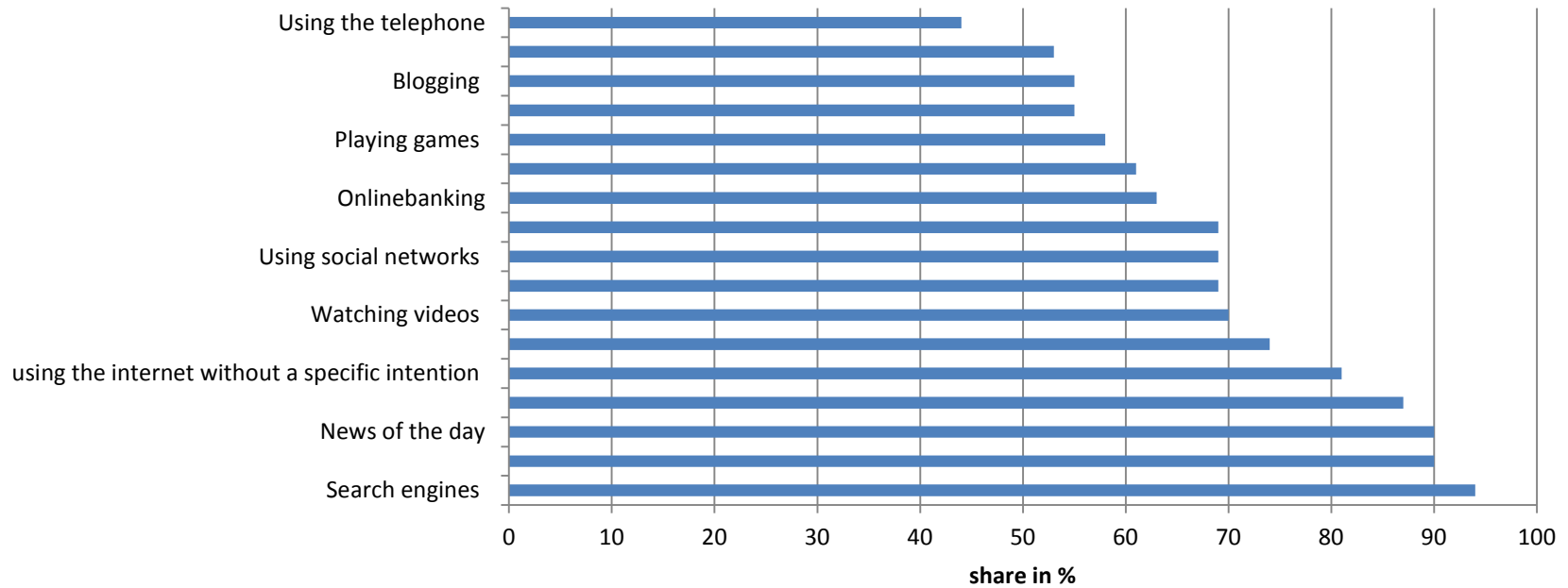


Printed books or ebooks buying behaviour (2012)

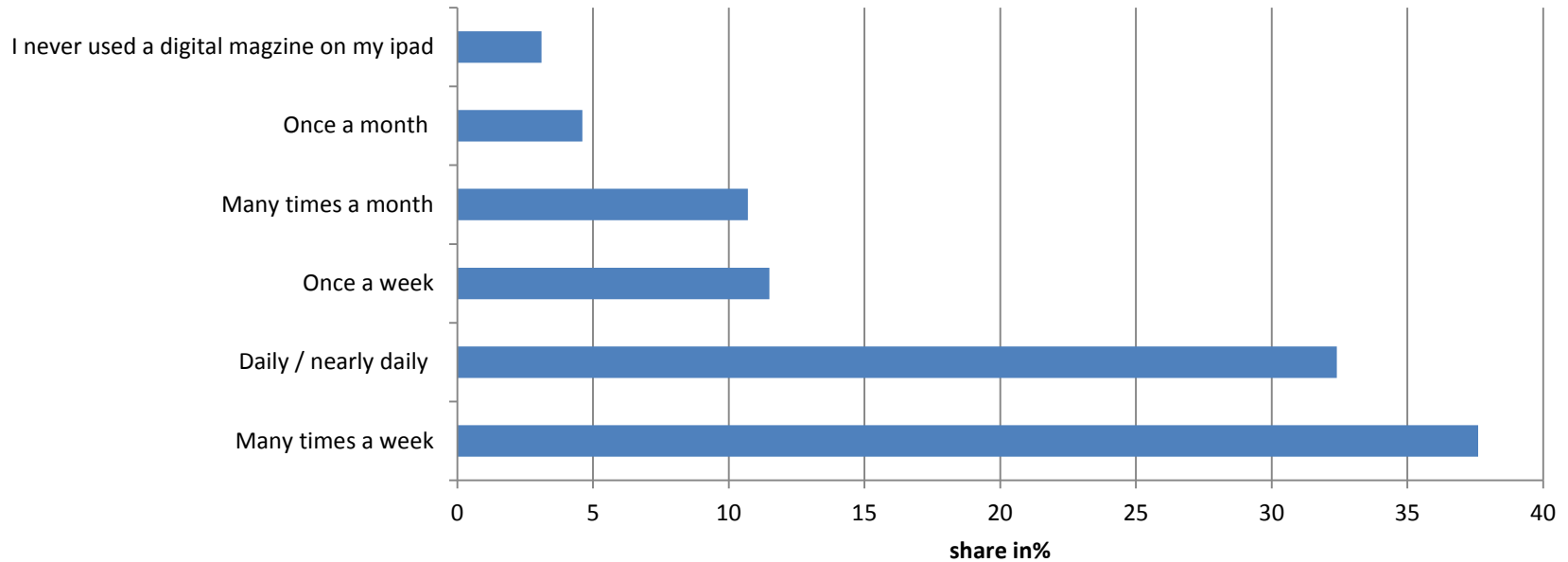




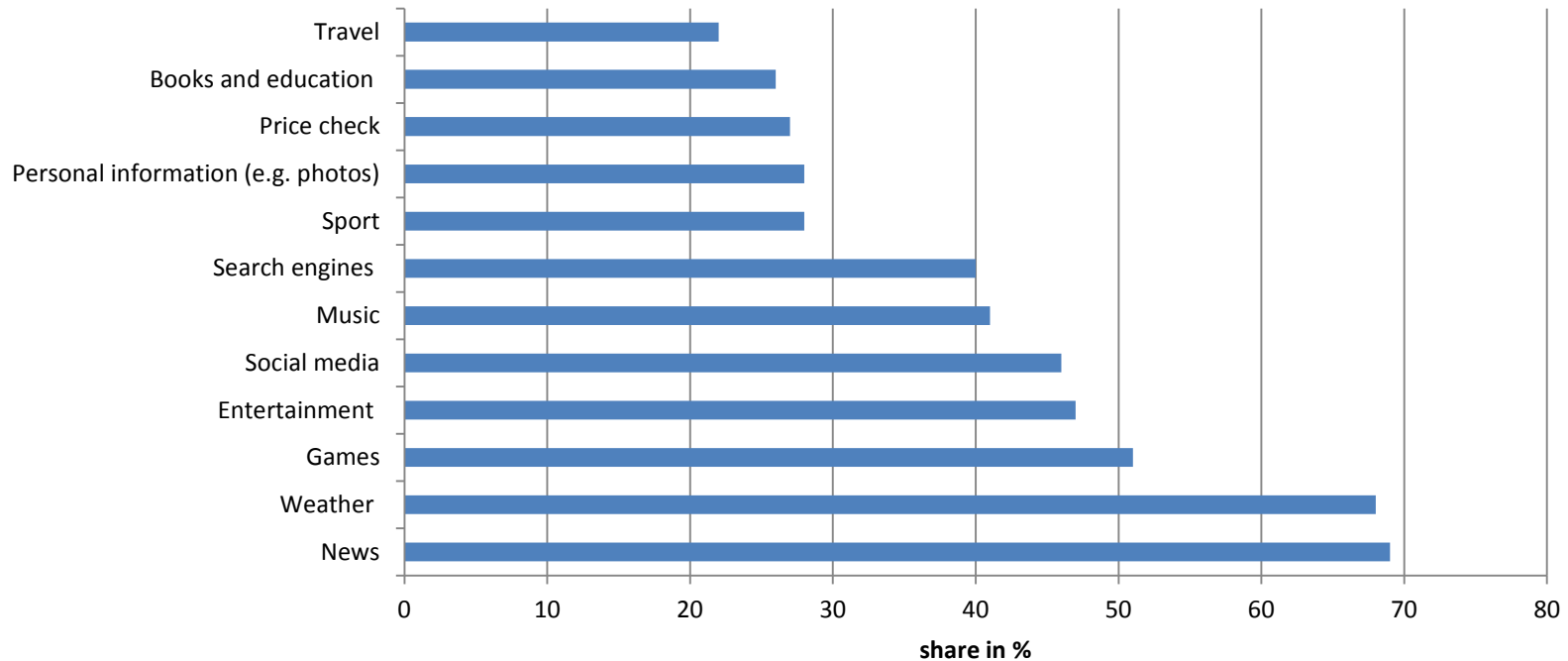
For what purpose do you use your tablet? (2011)



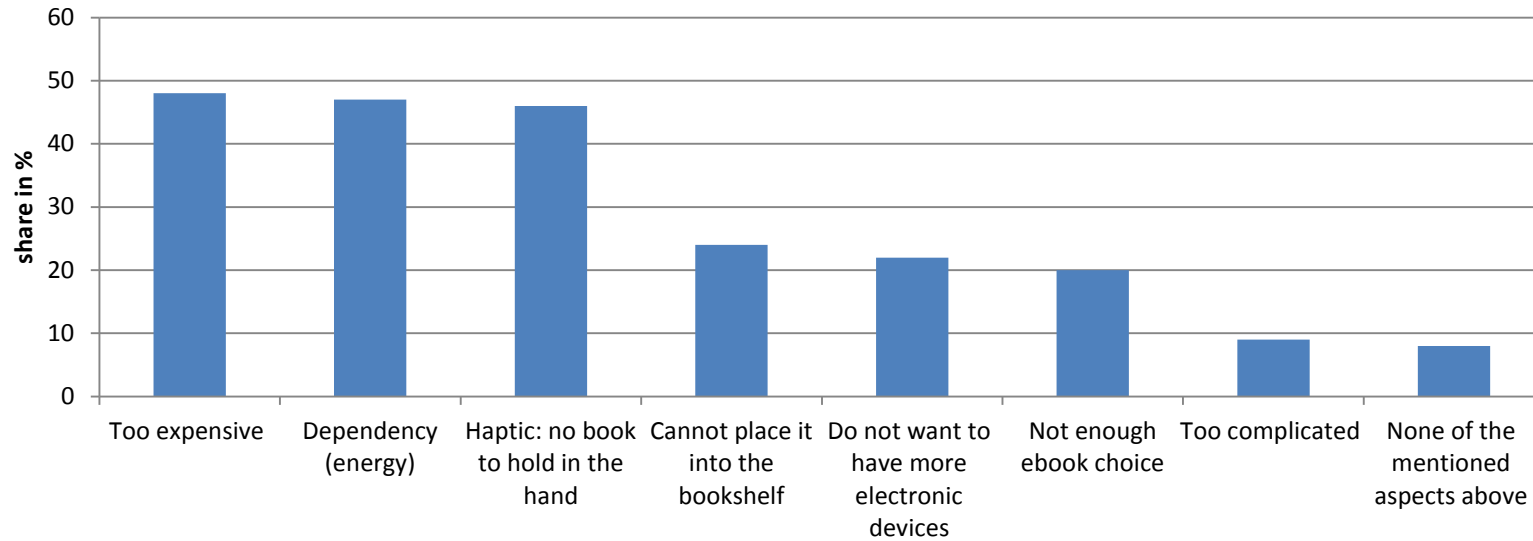
Frequency of usage of digital magazines on iPads



Mobile applications: usage (2011)

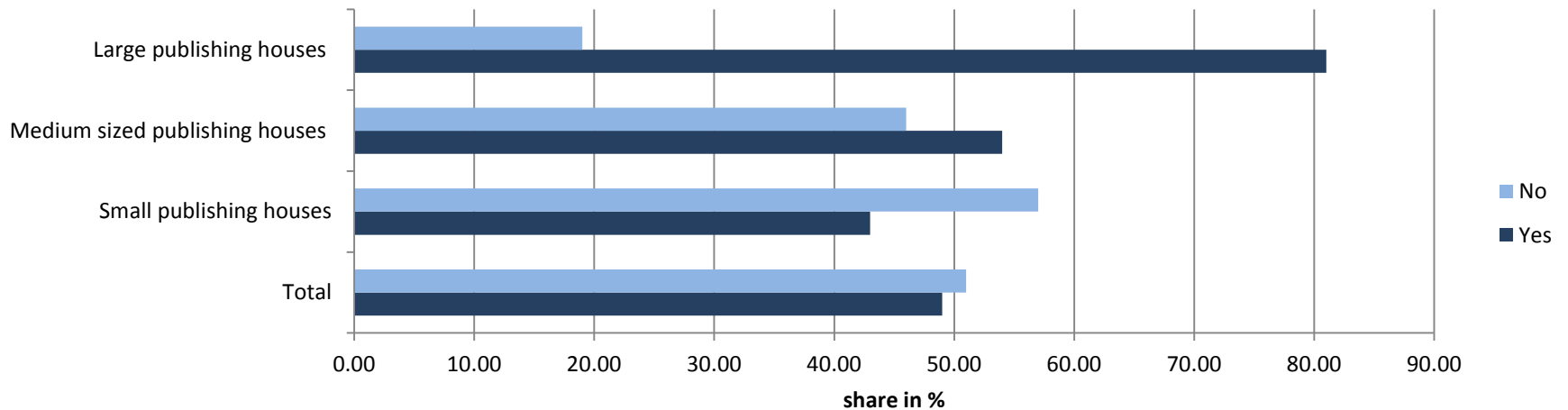


Arguments against ebook reader (2010)

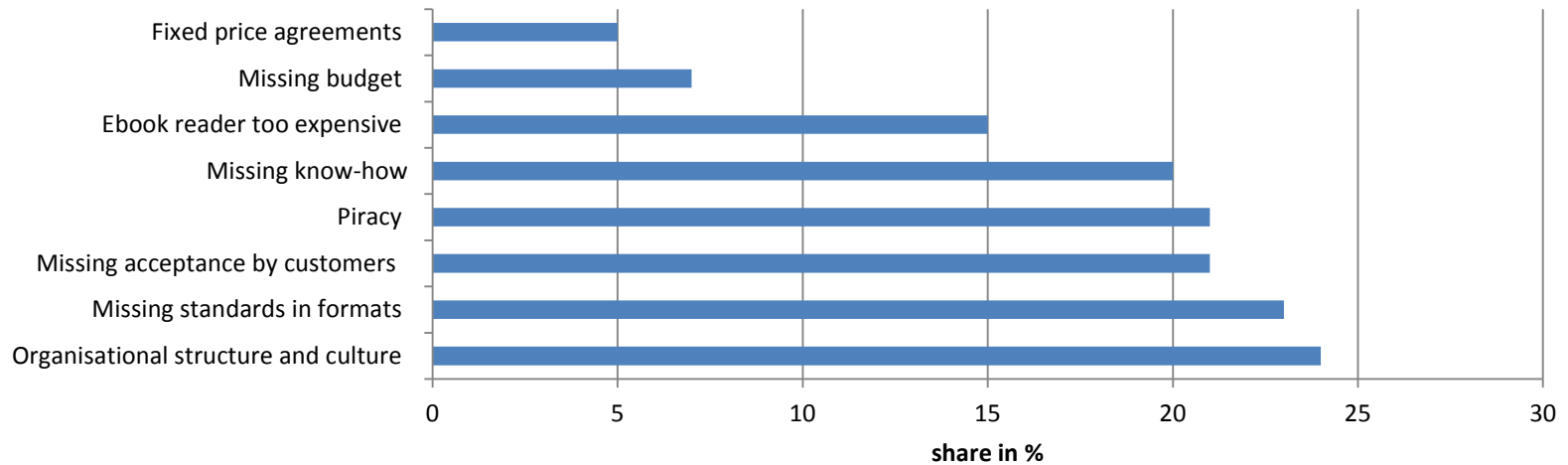


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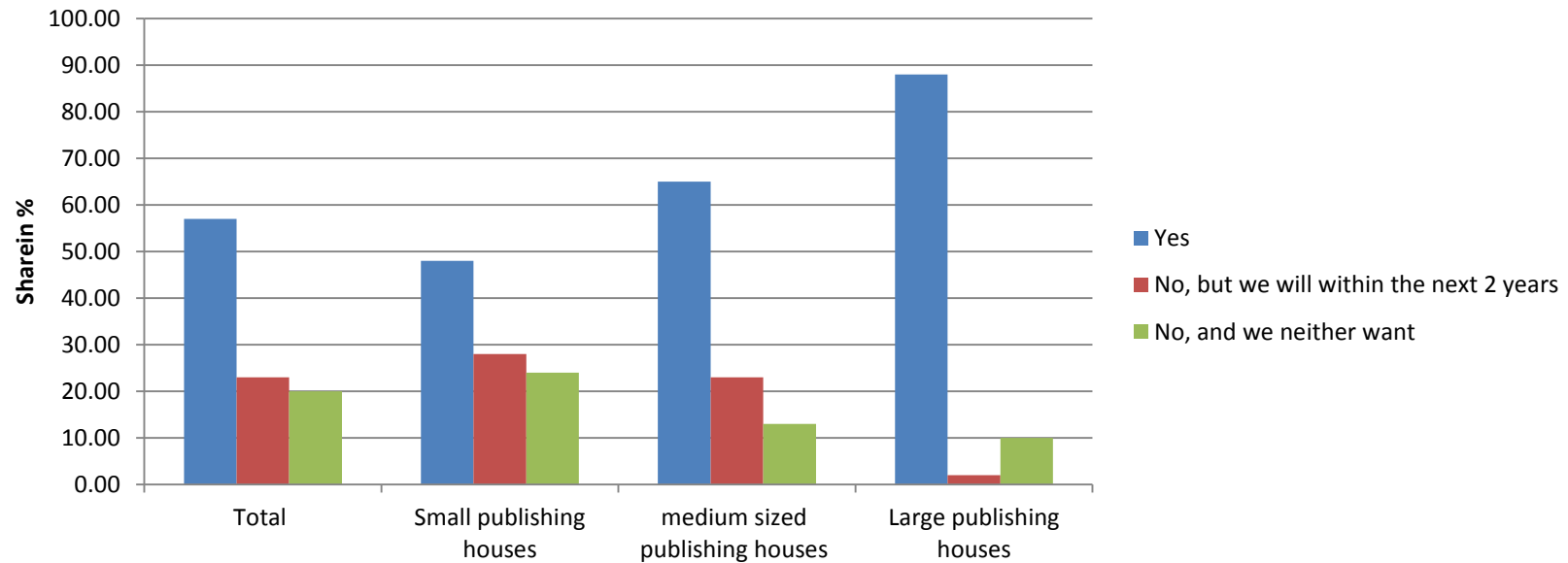
Do publishing houses sell ebooks? (2011)



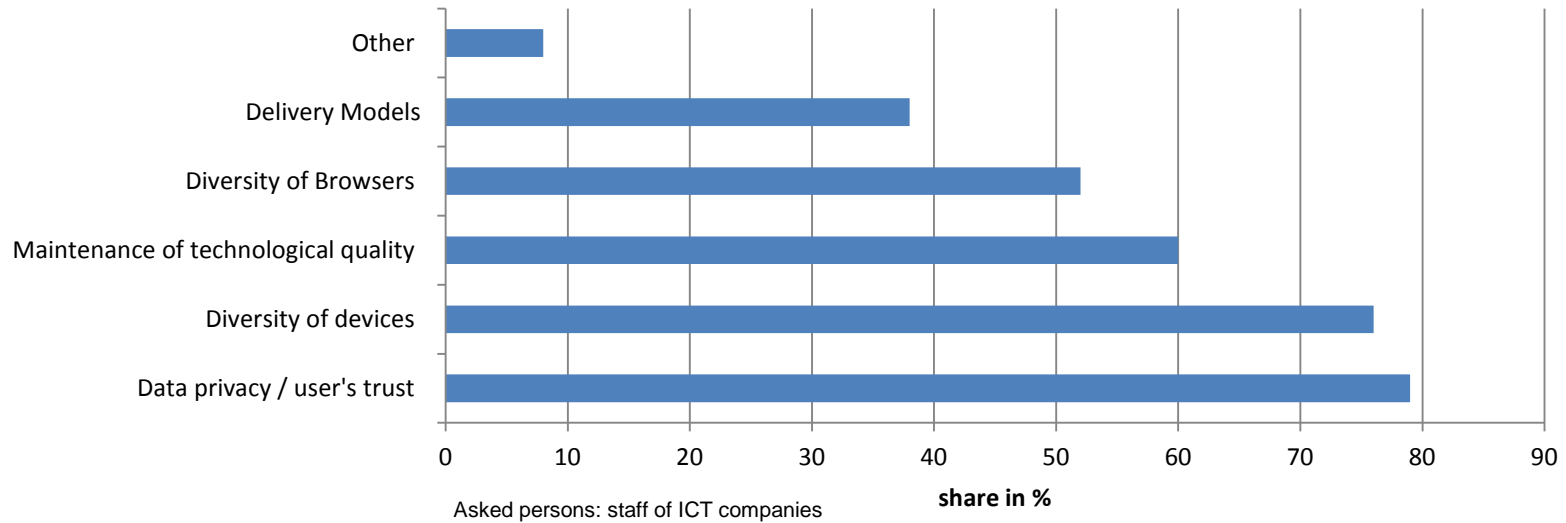
Challenges concerning launching ebooks in your publishing house (2011)



Ebook investments in publishing houses (2010)

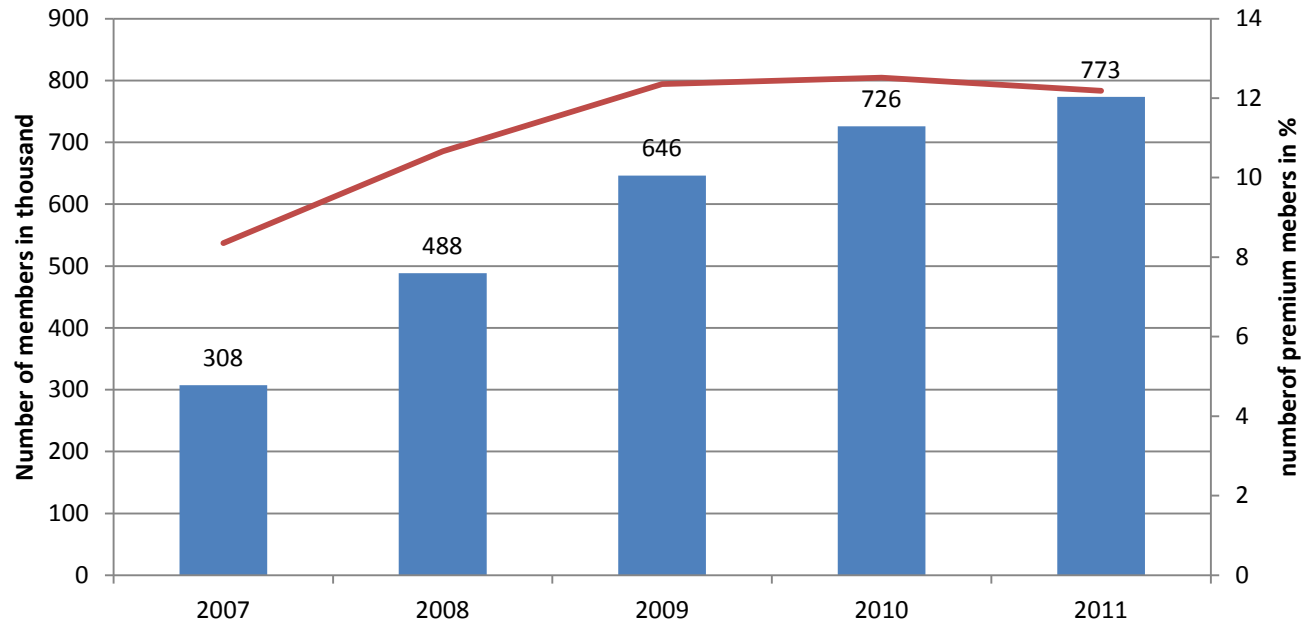


Mobile applications: challenges (2011)



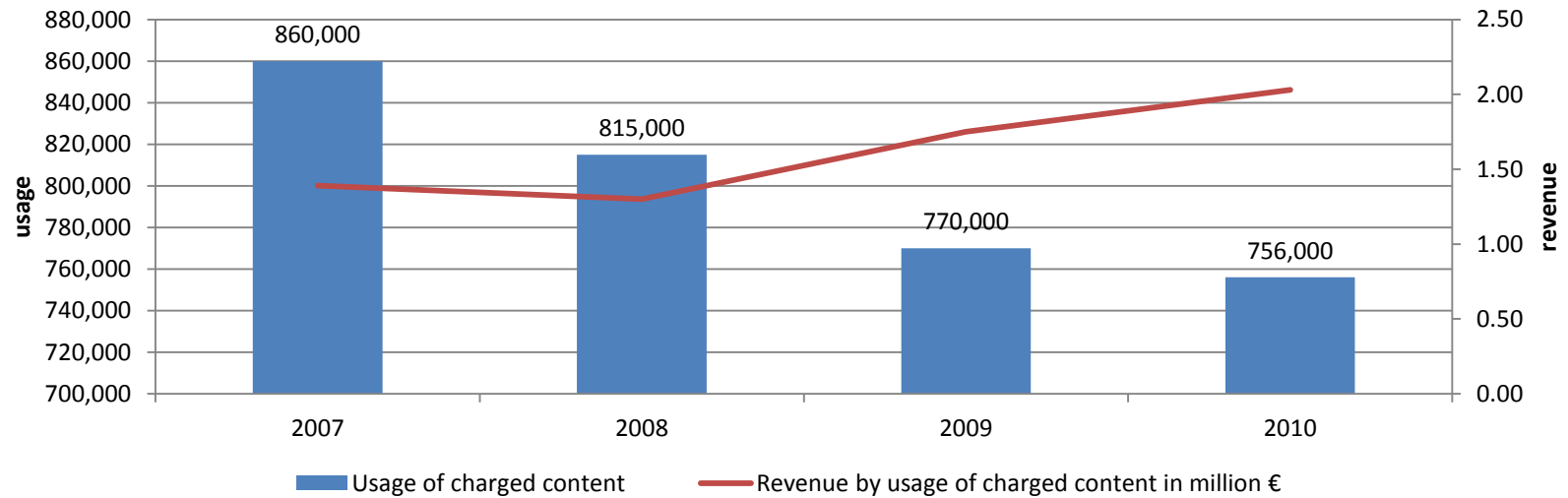
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Number of premium members of the business network Xing*



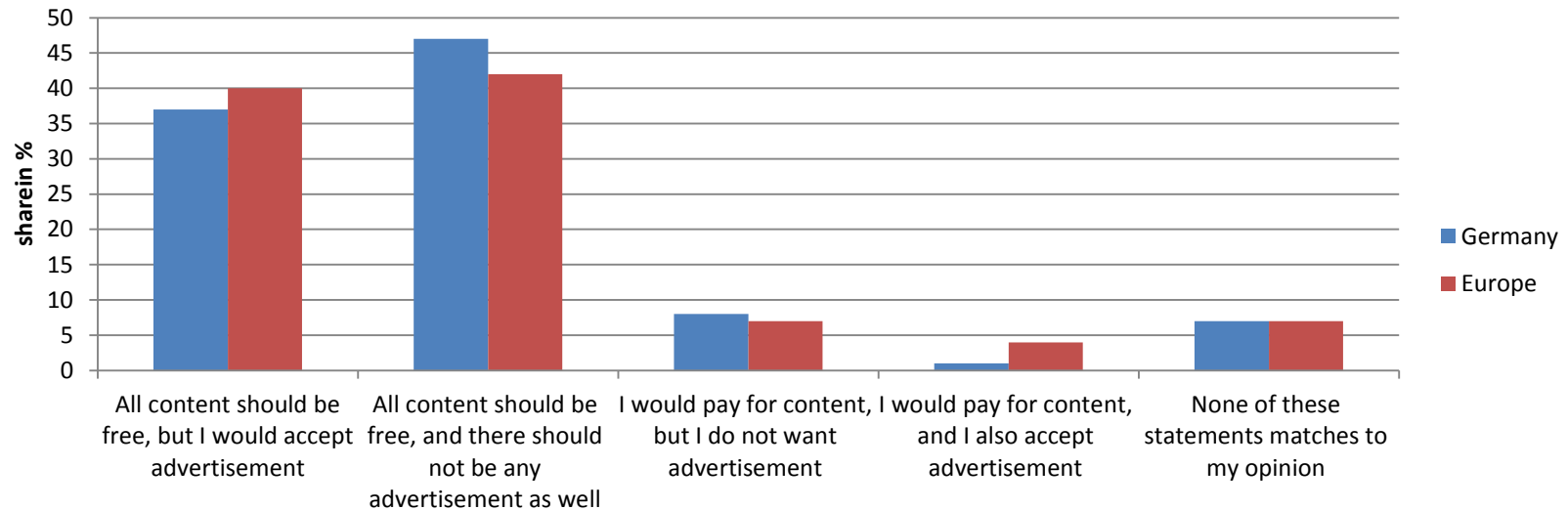
* Similar to LinkedIn

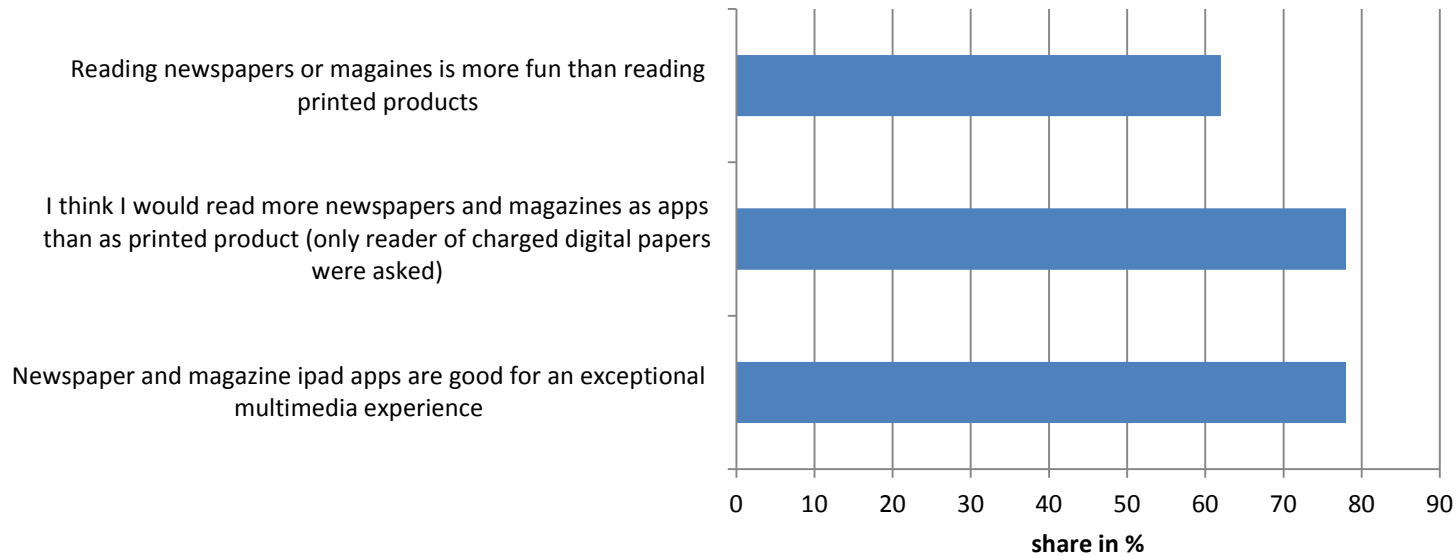
Paid content on www.test.de



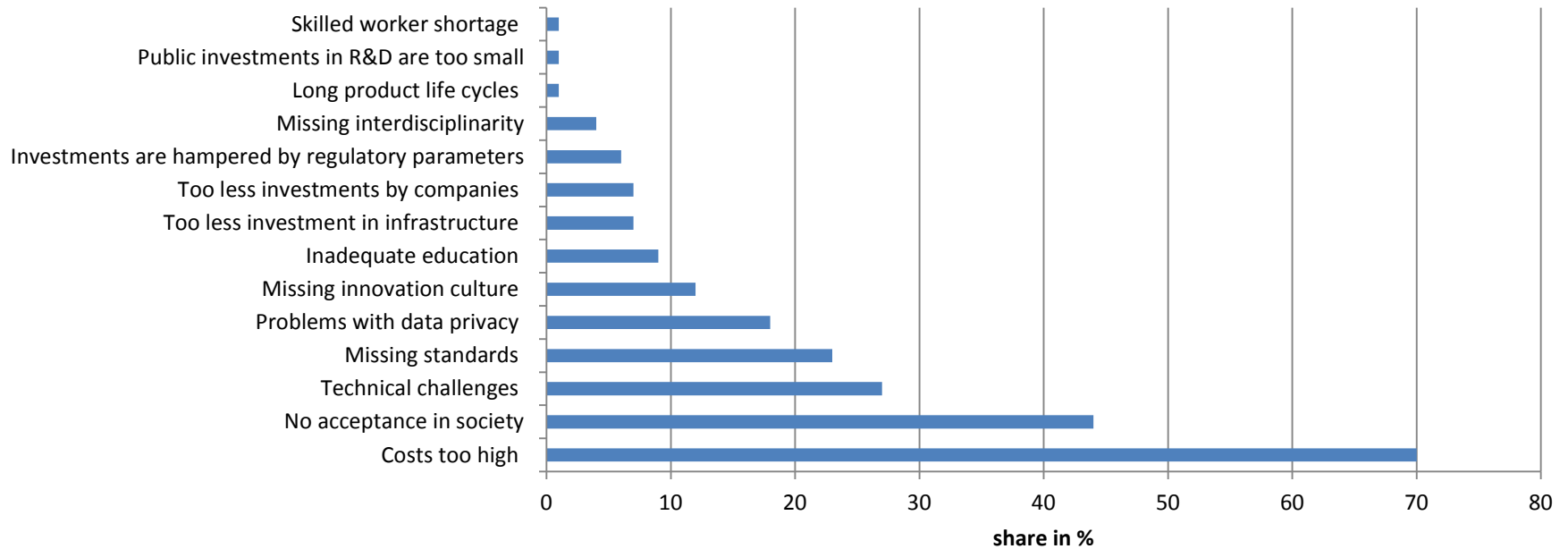
“**Stiftung Warentest** (www.test.de) is a German consumer organisation and foundation involved in investigating and comparing goods and services in an unbiased way” (wikipedia.de)

What people think about paid online content (2009)





Barriers concerning paying for online content



- Media Market in General
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- Innovative Business Models
- Results of a Survey: Crossmedia Publishing

- Publishing houses set the price of a book
- All traders have to sell the book at that price for at least 18 month
- Regulated by the German law on fixed book prices
- Core idea (www.wikipedia.de):
 - “a dense network of well-stocked, high quality bookshops is a necessary condition for the publication of a large variety of books
 - A large variety itself deemed desirable for the cultural life of a country
 - Such bookshops have additional costs that are not borne by discounters, who just stock their shelves with the current blockbusters.
 - Since the latter represent a large proportion of book sales, price competition between high-quality bookshops and discounters reduces bookshops' profitability”.
- FBPA does not apply to
 - Audio books
 - Used books
 - Remaindered books
 - Closing-down sale

Sales tax in Europe (selected countries)

Country	Sales tax %	Reduced sales tax %	Sales tax for e-books %	FBPA	Duration FP
Germany	19	7	19	Law	18 month
Austria	20	10	20	Law	24 month
Switzerland	8	2.5	7	Free prices	-
U.K	20	0	20	Law	24 month
Denmark	25	25	25	Free prices	-
Sweden	25	6	25	No	-
Netherlands	19	6	19	Law	12 month
Spain	18	4	18	Law	24 month
France	19.6	7	7	Law	24 month
Luxemburg	15	3	3	Law	

- Media Market in General
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- Voucher for giving away an ebook
- Revenue remains at traditional book store



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BuchMarkt, 05.10.2011



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 - Self publishing platform
 - Company of the publishing group Holtzbrinck
 - Reactions of established publishing houses
 - None (silence)
 - Badmouthing (it cannot work, it only produces bad or trivial titles)

Workbench (upload your book)

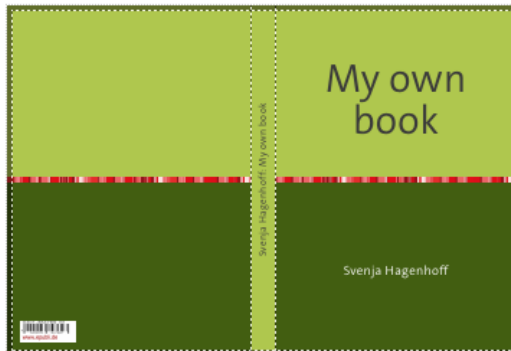
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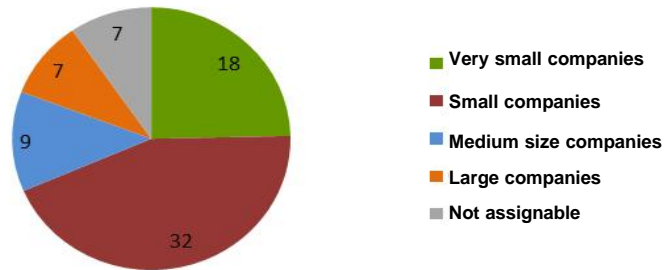
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- Innovative Business Models
- Results of a Survey: Crossmedia Publishing

- Topic: crossmedia publishing in specialist publishing houses
- Aim of the survey: to find out about the state of the art of crossmedia publishing
- Questions:
 - Do publishers crossmedia publishing?
 - How do they do it?
 - Are there different degrees of maturity depending on kinds of products or size of the publishing house
 - What are the most challenges in crossmedia publishing
- Survey was conducted spring to autumn 2011
- Methodology:
 - Qualitative survey: interviews with 13 experts from 13 publishing houses
 - Quantitative survey: written questionnaires (441 publishing houses)
 - Response rate 17 % (73 datasets)

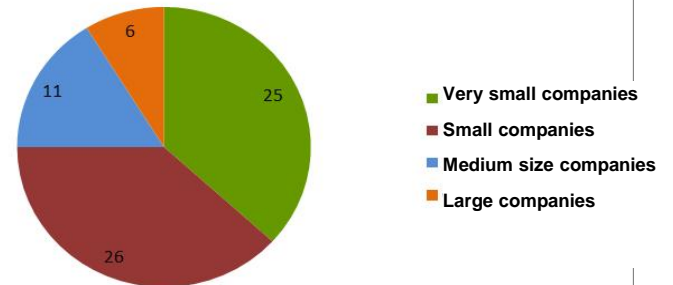
Characeristics of the sample

Size of the publishing house (number of employees)
(n=73, failure quota 0.00 %)
Data absolute



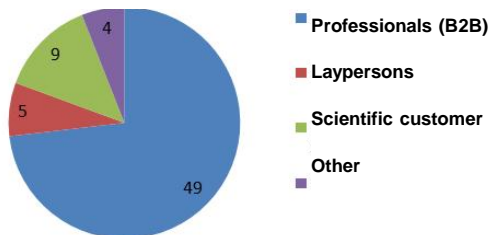
Very small companies: < 10 employees, small companies: < 50 employees, medium size companies <250 employees

Size of the publishing house (revenue)
(n=73, failure quota 8.22 %)
Data absolute

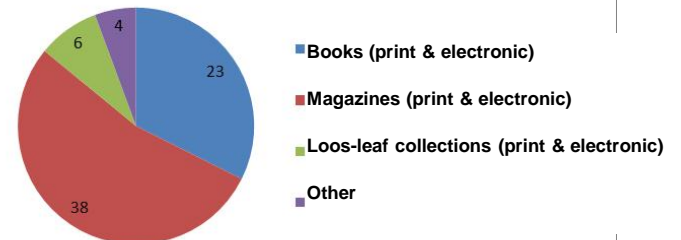


Very small companies: ≤ 2 Mio. €, small companies: ≤ 10 Mio. €, medium size companies ≤ 50 Mio. €

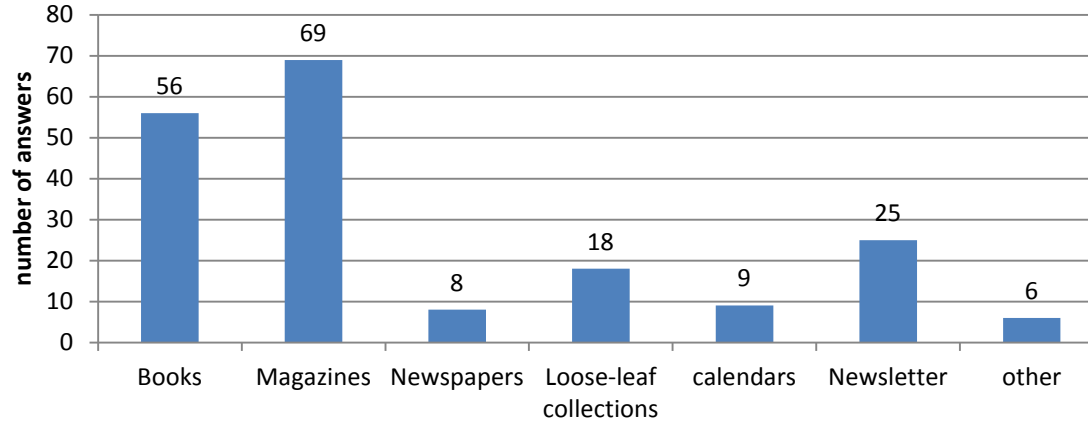
The biggest part of your revenue do come from which kind of customers?
(n=73, failure quota 8.22 %)
Data absolute



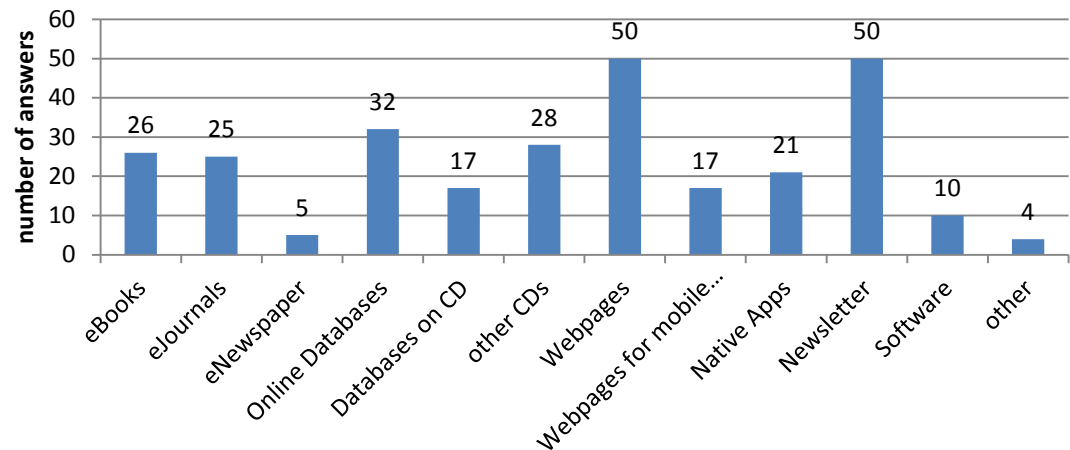
What is your primary source of revenue?
(n=73, failure quota 26.03 %)
Data absolute



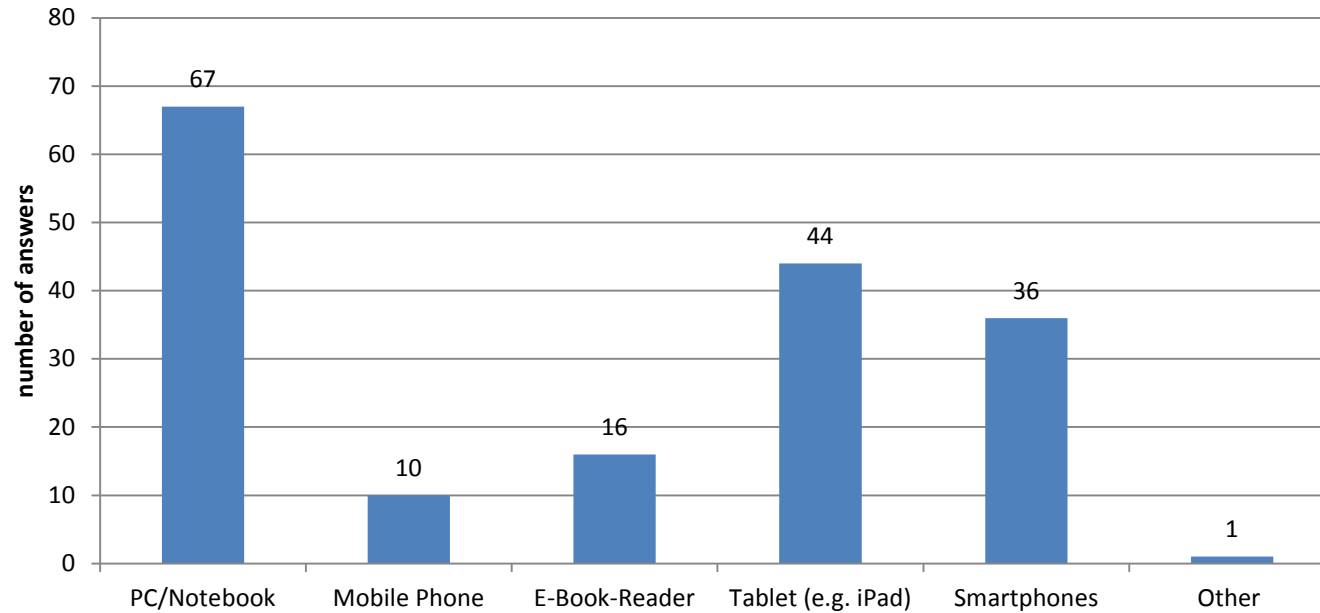
Which kinds of products do you produce (print)?
(n = 73, failure quota: 0,00 %)



Which kinds of products do you produce (electronic)?
(n = 73, failure quota 5,48 %)

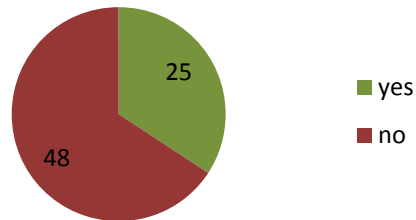


Which devices can customers use for your products?
(n = 73, Failure quota 6,85 %)

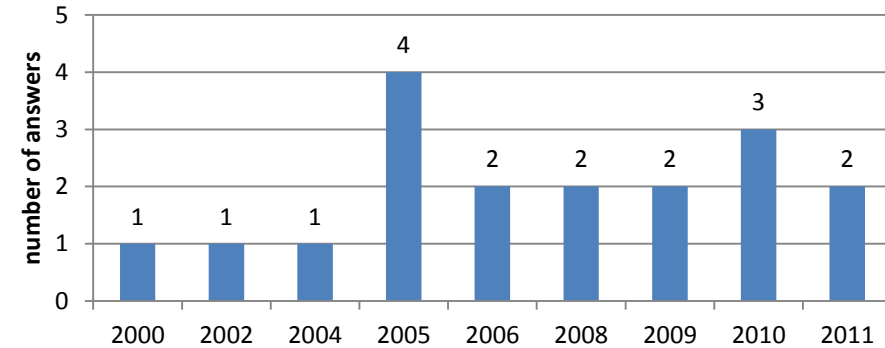


Usage of content management systems (1)

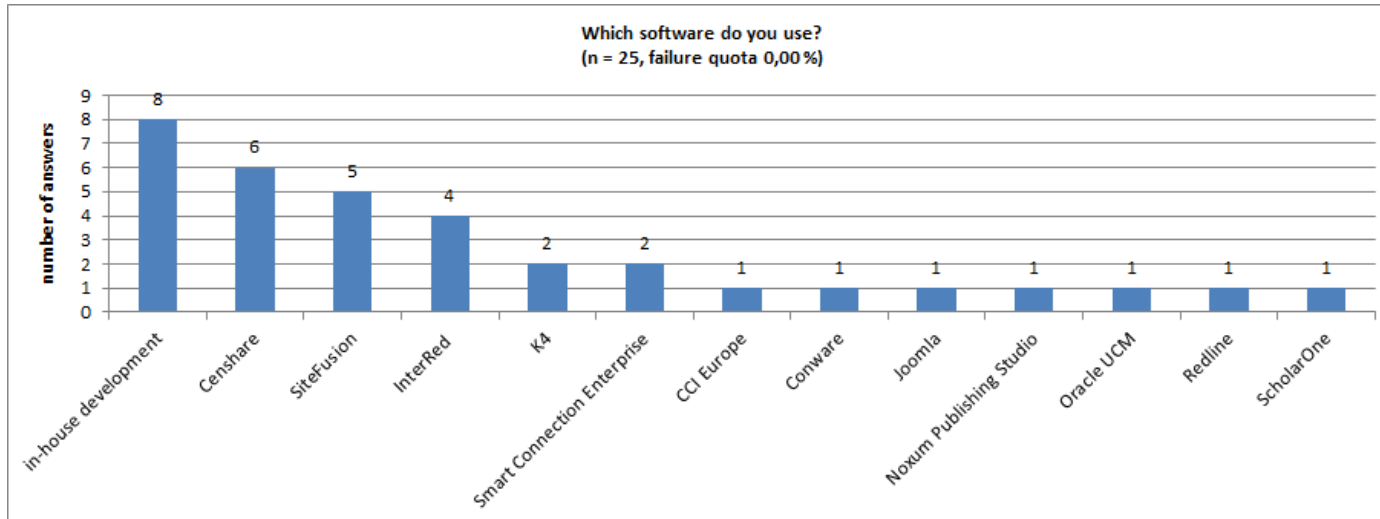
Do you have a content management system in your publishing house?
(n = 73, failure quota 0,00 %)
data absolute



When did you start using the software?
(n=18, FQ: 28,00 %)

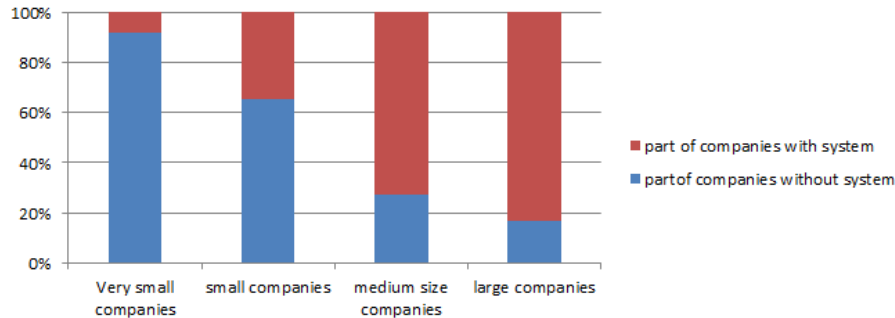


Which software do you use?
(n = 25, failure quota 0,00 %)

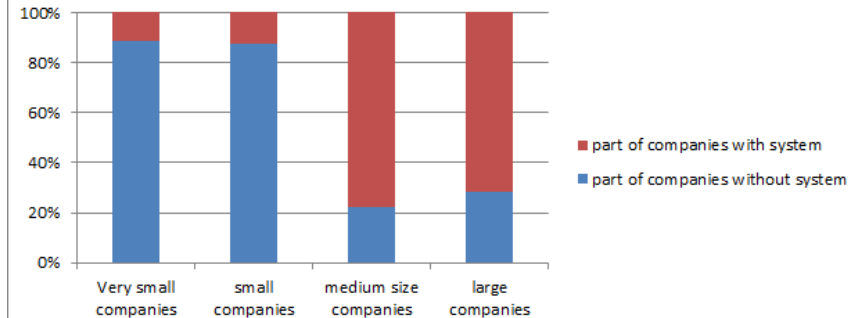


Usage of content management systems (2)

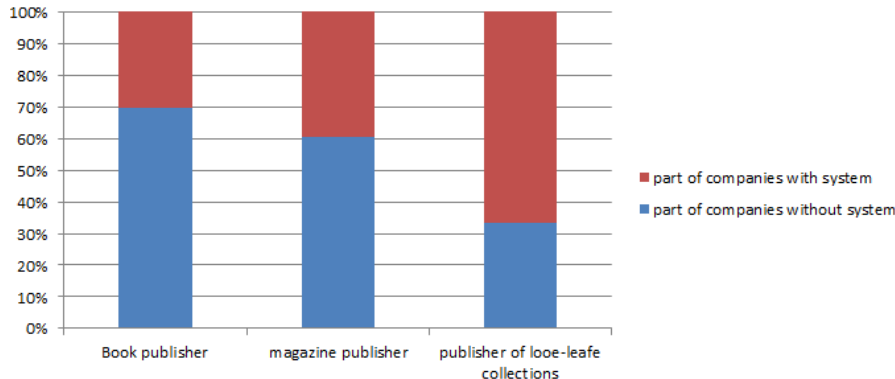
Parts of companies with / without CMS, differentiated by size of the companies (revenue)



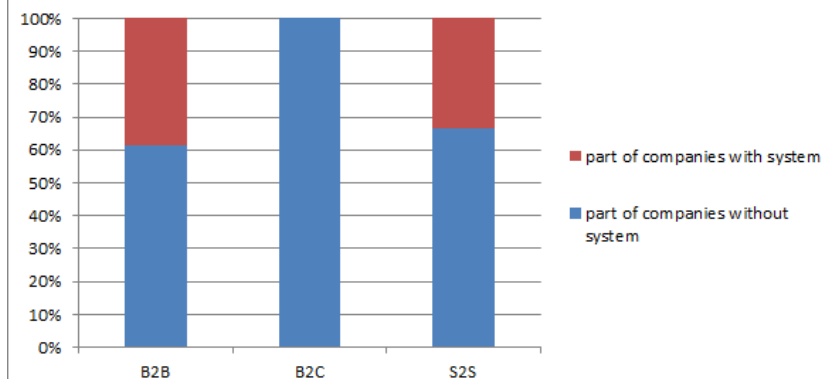
Parts of companies with / without CMS, differentiated by size of the companies (number of employees)



Parts of companies with / without CMS differentiated by kind of publishing house (focus: product with biggest revenue part)

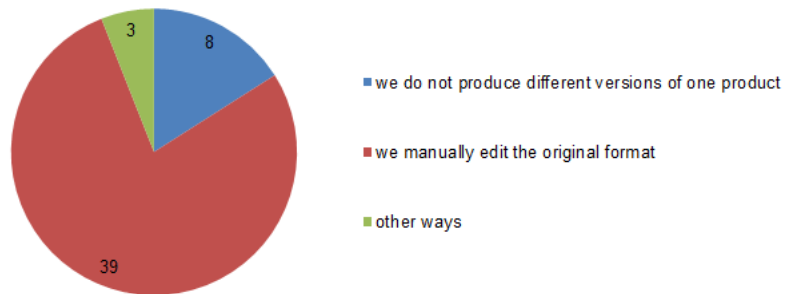


Parts of companies with / without CMS differentiated by kind of publishing house (focus: customer groups)

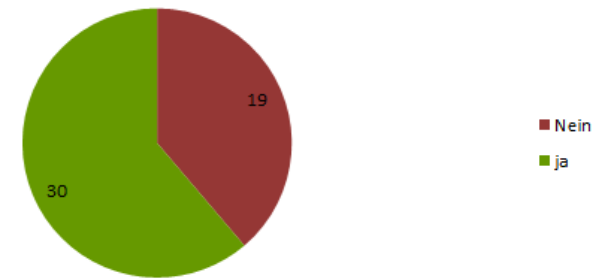


Non-usage of content management systems

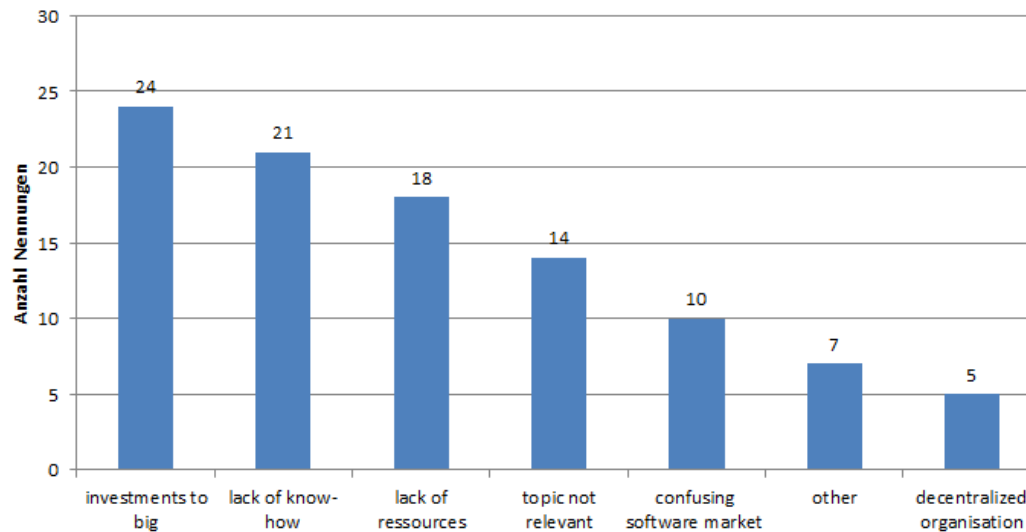
How do you produce different versions of your product?
(n = 48, failure quota 8.33 %)
data absolute



Do you intend to implement a content management system?
(n = 48, failure quota: 37,50 %)
data absolute

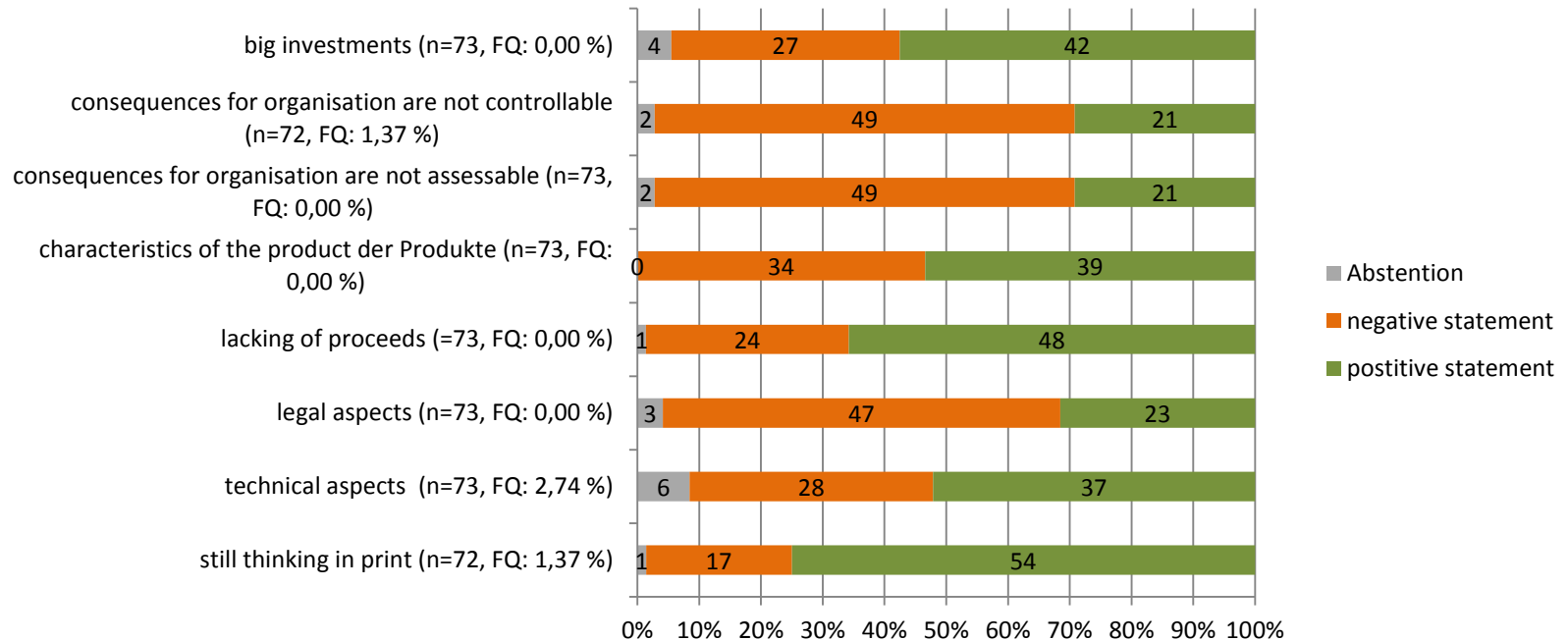


Why don't you have a content management system?
(n = 48, failure quota: 0,00 %)



The biggest challenge in crossmedia publishing is...

Agreement to the statement: the biggest challenge in crossmedia publishing is ...
(Scale normalized, values absolute)



- 0: I cannot estimate
- 1: I do not agree
- 2: I do rather not agree
- 3: I do rather agree
- 4: I do agree