"The book market is performing in almost exactly the wrong way."

"The ebook is not dead in France"

Print is back

“Stabilization”
Selected categories

Global spending 2013/2014 (bn US$)

CAGR 2009 to 2014 in %

2013 (bnUS$)  2014p (bnUS$)  2009 to 2014 CAGR %
US ebook sales 2010 - 2014

<table>
<thead>
<tr>
<th>Year</th>
<th>Total ebook sales (m$)</th>
<th>Total trade ebook sales (m$)</th>
<th>Ebook growth over previous year (in %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>1100</td>
<td></td>
<td>199</td>
</tr>
<tr>
<td>2011</td>
<td>2450</td>
<td></td>
<td>123</td>
</tr>
<tr>
<td>2012</td>
<td>3410</td>
<td>1511</td>
<td>44</td>
</tr>
<tr>
<td>2013</td>
<td>3420</td>
<td>1582</td>
<td>0.7</td>
</tr>
<tr>
<td>2014</td>
<td>3370</td>
<td></td>
<td>4.7</td>
</tr>
</tbody>
</table>
Market Share of Ebook Gross $ Sales by Publisher Type

- Indie Published
- From Small or Medium Publisher
- Amazon Published
- Big Five Published
- From Uncategorized Single-Author Publisher

Courtesy
Author Earnings / „Data Guy“
Hanni Münzer / Jojo Mojes (Germany) Amazon (print) sales rank in May/June 2014

- **Jojo Mojes - Eine Handvoll Worte**
  - **Author**: Jojo Mojes
  - **Title**: Eine Handvoll Worte
  - **Publisher**: rororo
  - **ISBN**: B00H7PYDV8

- **Hanni Münzer - Honigtot**
  - **Author**: Hanni Münzer
  - **Title**: Honigtot
  - **Publisher**: CreateSpace
  - **ISBN**: B00HSE9QDS

---

By publisher (Rowohlt)

Self-published (Amazon)

© by ruediger (at) wischenbart.com 2016
Interesting headlines

indeed
Main Sectors of the Publishing Industry (revenue share in the Top 10 groups (%))

<table>
<thead>
<tr>
<th></th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>STM</td>
<td>45%</td>
<td>43%</td>
<td>42%</td>
<td>41%</td>
<td>42%</td>
</tr>
<tr>
<td>Education</td>
<td>30%</td>
<td>30%</td>
<td>34%</td>
<td>34%</td>
<td>35%</td>
</tr>
<tr>
<td>Trade</td>
<td>30%</td>
<td>27%</td>
<td>25%</td>
<td>25%</td>
<td>23%</td>
</tr>
</tbody>
</table>

**UK book market evolution (p + e)**

**2009 - 2014**

### UK physical
- 2009>2010: 3.2%
- 2010>2011: -4.5%
- 2011>2012: 0.3%
- 2012>2013: -5.2%
- 2013>2014: -5.0%

### UK digital
- 2009>2010: 36.0%
- 2010>2011: 51.1%
- 2011>2012: 65.6%
- 2012>2013: 19.2%
- 2013>2014: 11.0%

### UK p+e combined
- 2009>2010: 4.5%
- 2010>2011: -1.7%
- 2011>2012: 5.4%
- 2012>2013: -2.2%
- 2013>2014: -2.0%

**2015 UP!**
"The big publishers are not gaining market share; the big books are not getting bigger; in 2014 it was the publisher that had the fewest ‘big’ hits that performed most strongly."

"The book market is performing in almost exactly the wrong way." Philip Jones

United Kingdom

2015 UP!
Spanish book production and sales 2005 - 2014

Copies sold (million) 231 228 251 241 236 228 200 170 154 154

Number of ISBN for new titles and re-editions (x1,000) 76 77 83 104 110 114 112 105 99 91

Average print run (x100) 46 49 55 50 43 38 34 35 32 29

Average retail price print €18.11 €18.84 €19.48 €19.72 €20.38 €20.27 €23.27 €18.47 €19.98 €20.67

???
Some strange economical voodoo!!!
Book retail sales (% over prev. year), Germany

<table>
<thead>
<tr>
<th>All retail channels (incl. Digital BMB)</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>All retail channels (incl. Digital BMB)</td>
<td>2.8%</td>
<td>0.4%</td>
<td>-1.8%</td>
<td>-1.0%</td>
<td>0.0%</td>
<td>-2.1%</td>
<td>-1.7%</td>
<td></td>
</tr>
<tr>
<td>Stationary retail (Barumsatz Sortiment, BMB)</td>
<td>0.0%</td>
<td>-2.8%</td>
<td>-3.0%</td>
<td>-3.7%</td>
<td>0.9%</td>
<td>-1.2%</td>
<td>-3.6%</td>
<td></td>
</tr>
<tr>
<td>Fiction (Belletristik), from prev. year</td>
<td>8.1%</td>
<td>6.9%</td>
<td>-0.9%</td>
<td>-0.1%</td>
<td>0.8%</td>
<td>-3.5%</td>
<td>-6.7%</td>
<td>-1.6%</td>
</tr>
</tbody>
</table>
Market share ebooks (% from trade) Germany

- Ebook market share of trade in %
- Ebook revenue share of surveyed publishers in %
- Ebook market (growth, %)

© by ruediger (at) wischenbart.com 2016

How come?
Total unit sales 2015 (by retail price)

Data courtesy Bookwire.de

© by ruediger (at) wischenbart.com 2016
Unit sales by price segment
(Bookwire, quarterly 2014 to 2015)

Data courtesy by Bookwire.de
Evolution by category
(Bookwire 2014 – 2015)

Data courtesy by Bookwire.de
Comparing pricing of different "Top 10 fiction" charts in Germany

- amazon.de
- amazon.de Deal of the Month
- Thalia.de (ebook bestsellers)
- Thalia Schnäppchen (ebook discounts)
- Top Fiction as ebook Spiegel/buchreport (11/2016)
- Top Fiction (HC print) Spiegel/buchreport (11/2016)
## Top10 print fiction in ebook editions

### ave. Price (€)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>FR</td>
<td>€15.80</td>
<td>€13.70</td>
<td>€12.89</td>
<td>€14.04</td>
<td>€19.94</td>
<td>€13.88</td>
<td>€15.19</td>
</tr>
<tr>
<td>DE</td>
<td>€12.66</td>
<td>€14.79</td>
<td>€16.99</td>
<td>€16.29</td>
<td>€16.89</td>
<td>€16.59</td>
<td>€17.70</td>
</tr>
<tr>
<td>SE</td>
<td>€15.24</td>
<td>€16.97</td>
<td>€17.68</td>
<td>€14.23</td>
<td>€11.97</td>
<td>€14.57</td>
<td></td>
</tr>
<tr>
<td>NL</td>
<td>€12.59</td>
<td>€10.64</td>
<td>€10.52</td>
<td>€10.56</td>
<td>€11.12</td>
<td>€12.32</td>
<td></td>
</tr>
<tr>
<td>SP</td>
<td>€11.82</td>
<td>€11.18</td>
<td>€9.07</td>
<td>€10.12</td>
<td>€8.86</td>
<td>€9.87</td>
<td>€11.71</td>
</tr>
<tr>
<td>UK</td>
<td>€7.67</td>
<td>€9.24</td>
<td>€9.67</td>
<td>€5.98</td>
<td>€7.12</td>
<td>€8.45</td>
<td>€11.31</td>
</tr>
</tbody>
</table>

© by ruediger (at) wischenbart.com 2016
Global and by country list price summary
(Ingram, 2013 – 2015)

Data courtesy of Ingram
Top 10 ebook charts (EU)
Ave. price points Amazon vs. domestic retailers

Sep 13  Sep 14  March 2016
### Amazon revenue in international markets

<table>
<thead>
<tr>
<th>Year</th>
<th>DE</th>
<th>JP</th>
<th>UK</th>
<th>All other Int</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>5.3</td>
<td>5.0</td>
<td>3.9</td>
<td>1.3</td>
</tr>
<tr>
<td>2011</td>
<td>7.2</td>
<td>6.6</td>
<td>5.4</td>
<td>2.2</td>
</tr>
<tr>
<td>2012</td>
<td>8.7</td>
<td>7.8</td>
<td>6.5</td>
<td>3.3</td>
</tr>
<tr>
<td>2013</td>
<td>10.5</td>
<td>7.6</td>
<td>7.3</td>
<td>4.5</td>
</tr>
<tr>
<td>2014</td>
<td>11.9</td>
<td>7.9</td>
<td>8.3</td>
<td>5.4</td>
</tr>
<tr>
<td>2015</td>
<td>11.8</td>
<td>8.3</td>
<td>9.0</td>
<td>7.4</td>
</tr>
</tbody>
</table>
Amazon web traffic 2015
for selected markets in Europe
Visits from Feb, 2015 to Jan, 2016

Web traffic analysis for this report with SimilarWeb
5 European piracy websites
Traffic Sep 2014 to March 2016

Web traffic piracy sites; Analysis for this report. SimilarWeb Pro
3 major legal & 2 pirate platforms in Germany
Web traffic Sep 2014 – Feb 2016
2 legal and 2 piracy platforms: Traffic sources and engagement (Germany, Oct 2014 – Feb 2015, SimilarWeb)

Engagement
Oct 2014 - Feb 2016, Germany

<table>
<thead>
<tr>
<th>Domain</th>
<th>Avg. Monthly Visits</th>
<th>Avg. Visit Duration</th>
<th>Pages/Visit</th>
<th>Bounce Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>thalia.de</td>
<td>1,443,947</td>
<td>00:06:17</td>
<td>9.34</td>
<td>30.11%</td>
</tr>
<tr>
<td>weltbild.de</td>
<td>2,104,404</td>
<td>00:05:59</td>
<td>8.22</td>
<td>36.13%</td>
</tr>
<tr>
<td>boerse.to</td>
<td>3,646,283</td>
<td>00:06:31</td>
<td>7.21</td>
<td>16.76%</td>
</tr>
<tr>
<td>lesen.to</td>
<td>829,937</td>
<td>00:05:17</td>
<td>6.36</td>
<td>25.88%</td>
</tr>
</tbody>
</table>

Traffic share

- thalia.de
- weltbild.de
- boerse.to
- lesen.to

[Graph showing traffic share]
Leading piracy sites (German)
Traffic sources

Distribution of traffic source in %, avg.
Weekly visits, and Bounce rate
(analysis with SimilarWeb)
Wordcloud for 2 legal and 2 piracy sites (Germany, year end 2015)

Web tracking
With Similarweb

© by ruediger (at) wischenbart.com 2016
Where are we going?
Media partners:
BookDao • BookExpo America • BookIndustryMagazine • The Bookseller • buchreport • DosDoce.com • Frankfurt Book Fair • Informazioni editoriali • Livres Hebdo • The London Book Fair • PublishNews • Publishing Perspectives • Publishers Weekly

www.global-ebook.com