


The background of the slide is a photograph of a person's hand holding a tablet computer. The person is wearing a blue checkered shirt. The background is blurred, showing what appears to be a library or bookstore with bookshelves. The text is overlaid on a semi-transparent white box.

Who borrows what in libraries and especially online?

A 360° look at Germany's digital public library service "Onleihe"






A study based on the GfK Consumer Panel Media*Scope for the Börsenverein des Deutschen Buchhandels (German Publishers and Booksellers Association)

GfK Consumer Panels & Services | November 2019

Decorative orange circuit lines are located in the bottom right corner of the slide, featuring several circular nodes connected by thin lines.

Study design & instrument

Overview

	METHOD	Ad hoc questions in the context of the GfK Consumer Panel Media*Scope (multi-topic survey)
	FIELD PERIOD	July 2019
	POPULATION	Germans aged 10 years and up (67.1 million individuals)
	SAMPLE	n = 16,546 individuals surveyed (net)
	INSTRUMENT	The GfK Consumer Panel Media*Scope continuously monitors entertainment product groups relating to video, cinema, music, games and books. Ad hoc surveys carried out as part of this panel have the advantage of providing access to an extensive set of socio-demographic and descriptive consumer information. In addition, the study report was able to analyse the actual buying behaviour of select target groups active on the book market (e.g. Onleihe borrowers) in the period from July 2018 to June 2019.



Please note: The term “borrower” is used in the study report to mean those individuals who borrow media from libraries either on site or via the digital public library service “Onleihe”.

This study provides answers to questions relating to the use of Onleihe, to Onleihe users themselves and to Onleihe users' behaviour on the general book market.



Five hypotheses were selected for consideration:

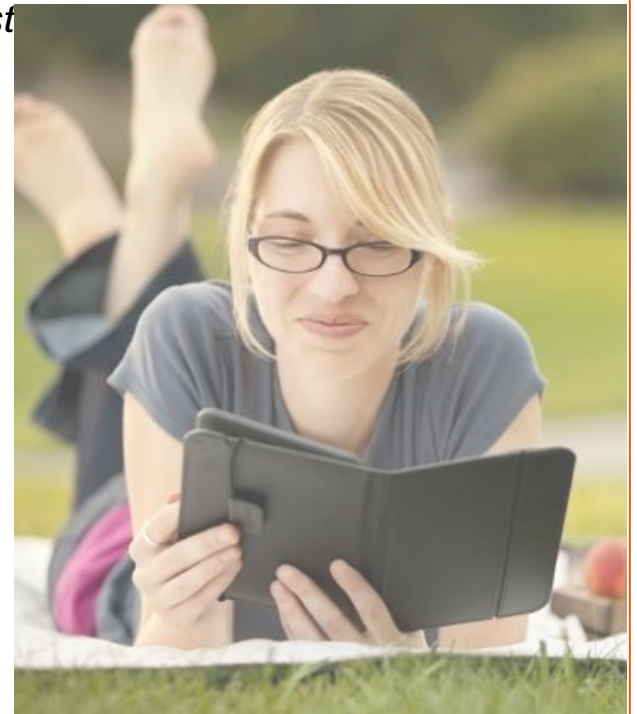
Hypothesis 1: *Onleihe reaches consumers who are, for the most part, no longer active on the book market.*

Hypothesis 2: *Onleihe has no impact on consumers' buying behaviour on the book market.*

Hypothesis 3: *Onleihe reaches book-buying target groups, whose number of book purchases has declined.*

Hypothesis 4: *Individuals who borrow books via Onleihe do so for economic reasons.*

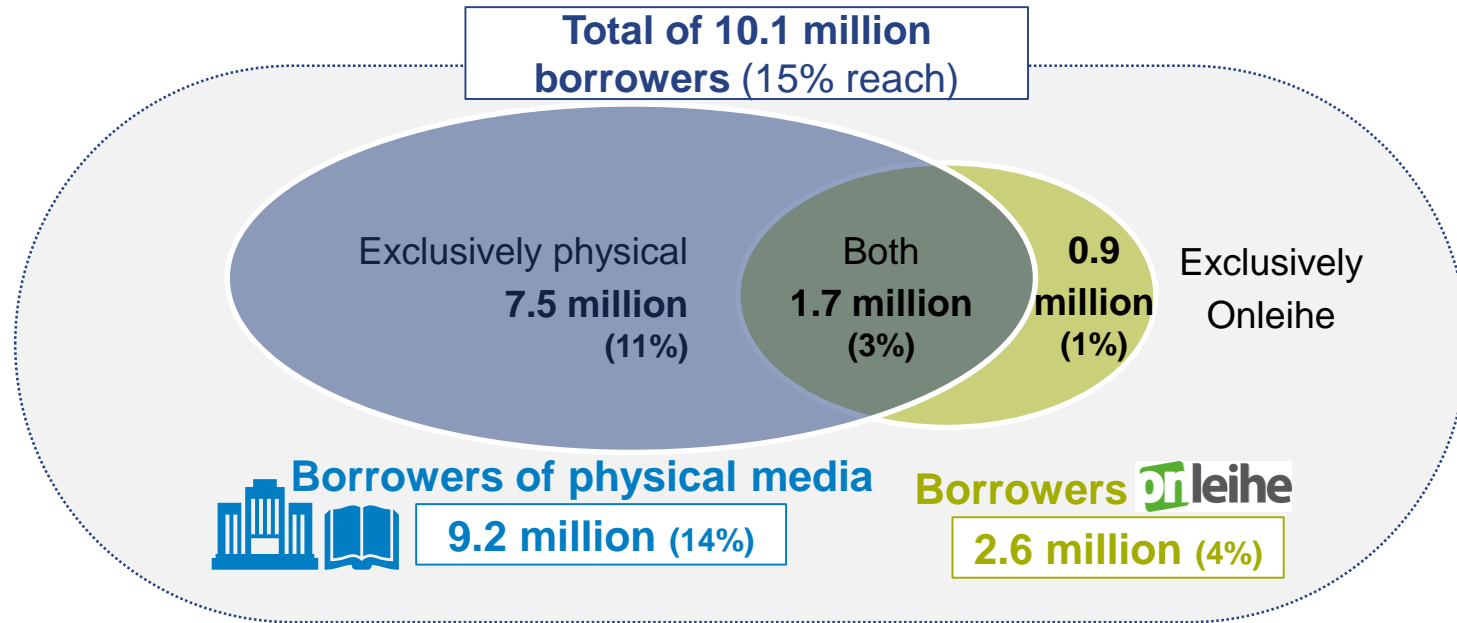
Hypothesis 5: *Onleihe needs to offer more of the latest up-to-date book releases.*



German public libraries have a reach of approximately 10 million people (15%); 2.6 million individuals used Onleihe in the previous 12 months.

Use of public libraries in the previous 12 months

Public library borrowers



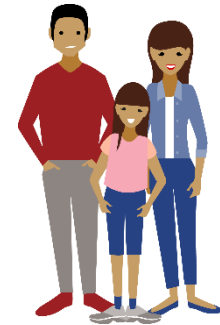
Question 1: Have you used a library to borrow books and/or other media in the past twelve months?

Library borrowers are also active as buyers on the book market. Roughly two-thirds of them purchase books and/or audio books (physical and/or digital) over the course of one year.



Intersection – figures in millions of individuals, %

	Total number of borrowers 10.1 million	Borrowers of physical media 9.2 million	Onleihe users 2.6 million
Total population (67.1 million)	15%	14%	4%
Total number of book buyers (29.6 million)	64%	65%	66%
Book buyers who purchased physical books and audio books-CDs (28.2 million)	63%	64%	59%
Book buyers who purchased digital e-books and/or digital audio books (4.5 million)	8%	7%	18%



What the numbers say:
Of the 10.1 million individuals in Germany who are library borrowers (15% reach in the population), 64% of them bought at least one book (overall, physical, digital) in the past 12 months

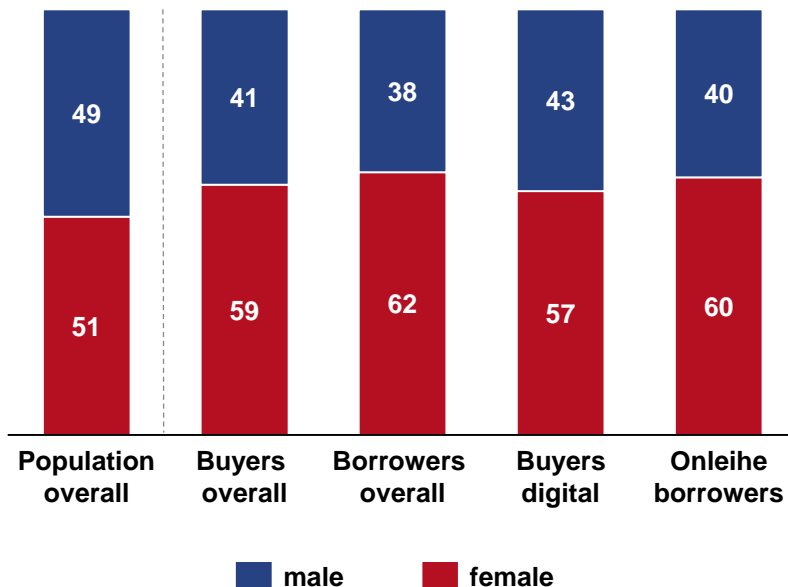
Compared to book buyers and the general population, library borrowers are younger and tend to be female.



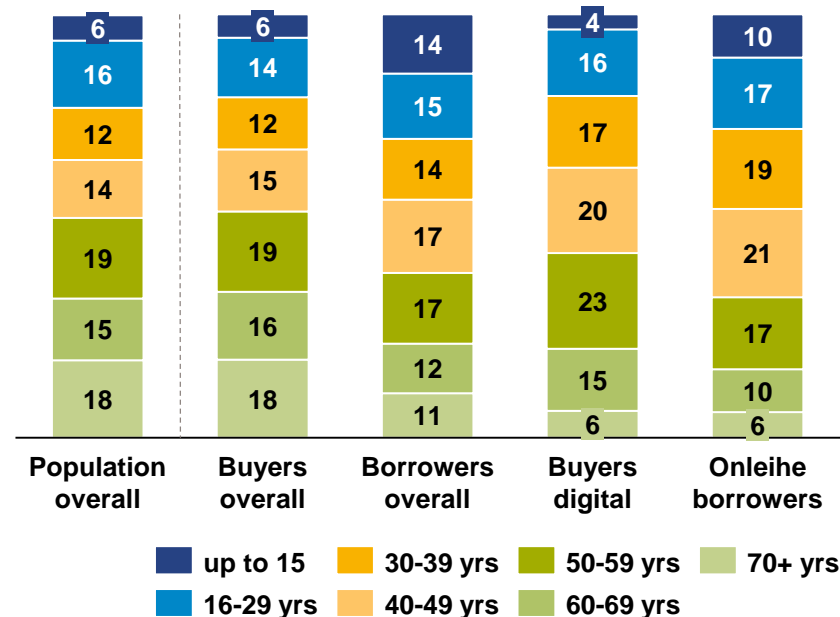
Socio-demographic indicators in %

Population	Buyers overall	Borrowers overall	Buyers digital	Onleihe borrowers
67.1 million	29.6 million	10.1 million	4.5 million	2.6 million

Gender



Age



Buyers: book market including audio books (physical + download) + e-books; time period: July 2018 - June 2019
 Borrowers: Question 1: In the past twelve months, did you use a library to borrow books and/or other media?

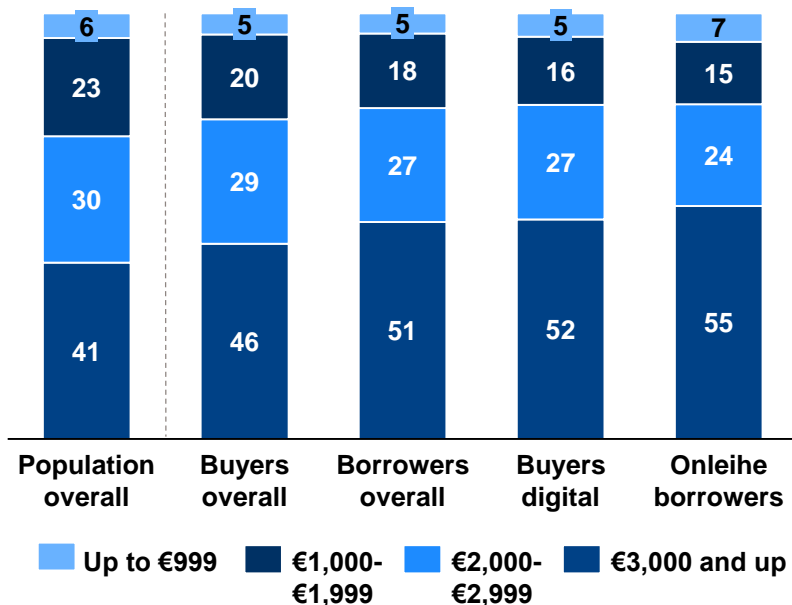
Onleihe users have above-average levels of income and education in comparison to the general population.



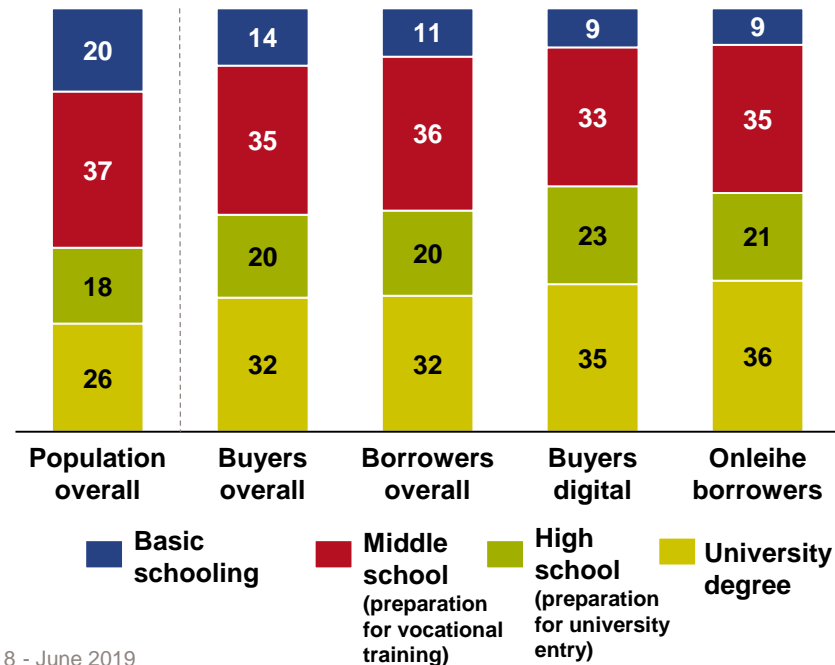
Socio-demographic indicators in %

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Income (per month)



Education



Buyers: book market including audio books (physical + download) + e-books; time period: July 2018 - June 2019
 Borrowers: Question 1: In the past twelve months, did you use a library to borrow books and/or other media?

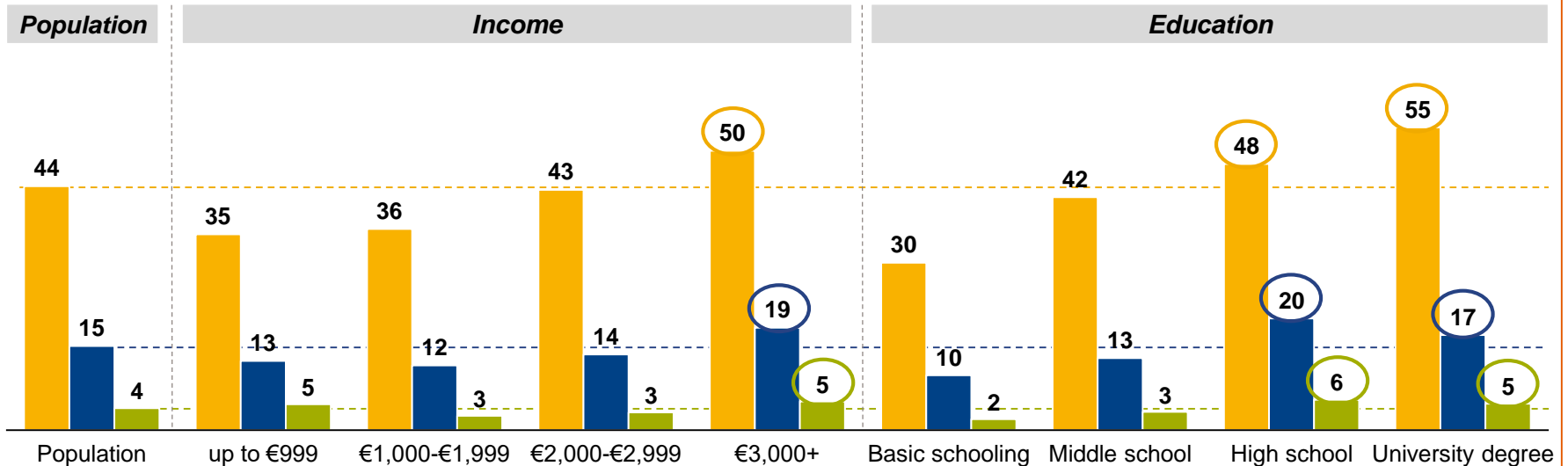
Individuals with an income of €3,000+/month and a high level of education purchase and borrow books at an above-average level.



Reach in %

Population	Buyers overall	Borrowers overall	Onleihe borrowers
67.1 million	29.6 million	10.1 million	2.6 million

Population, income & education



■ Total buyers ■ Onleihe users
■ Total borrowers

What the numbers say: The reach of library borrowing is 20% in the case of people with a high school diploma (reach among general population 15%)

Buyers: book market including audio books (physical + download) + e-books; time period: July 2018 - June 2019
 Borrowers: Question 1: In the past twelve months, did you use a library to borrow books and/or other media?

Onleihe users – Key facts

2.6 million people in Germany borrow digital books and other media via Onleihe (**4% reach**).

Two-thirds of Onleihe users are **under the age of 50**, which makes them relatively **young in comparison to the rest of the population**. They also have **above-average levels of income and education**.



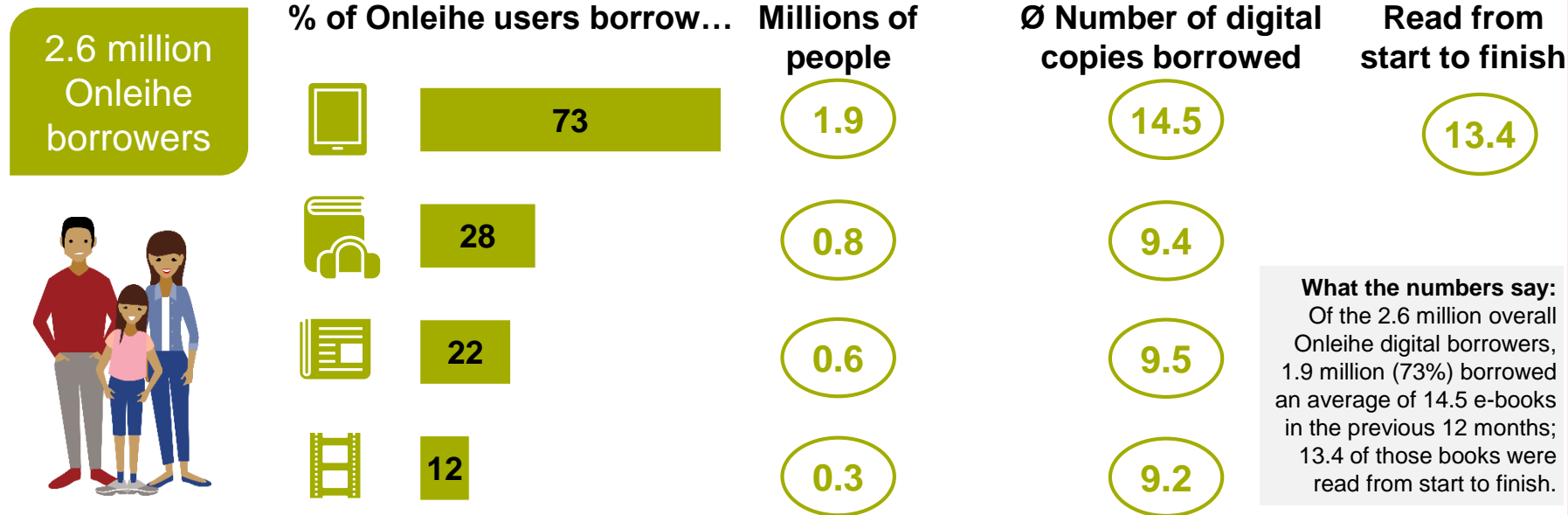
73% of Onleihe users borrowed at least one e-book in the previous twelve months. Onleihe users borrow an average of 14.5 digital books per year, and almost all of these books are read from start to finish.



Onleihe borrowers – Overview of their borrowing behaviour

Onleihe borrowers

2.6 million



E-books
Digital audio books
E-newspapers / E-magazines
Other media

Question 3a: With regard to the physical media you borrow from public libraries, how many printed books, audio-book CDs, printed newspapers/magazines and other media, including music CDs and DVDs, would you say you've borrowed from the library in the past twelve months? Question 3b: Of all the printed books you borrowed (see Question 3.a.), how many of these books did you read from start to finish?

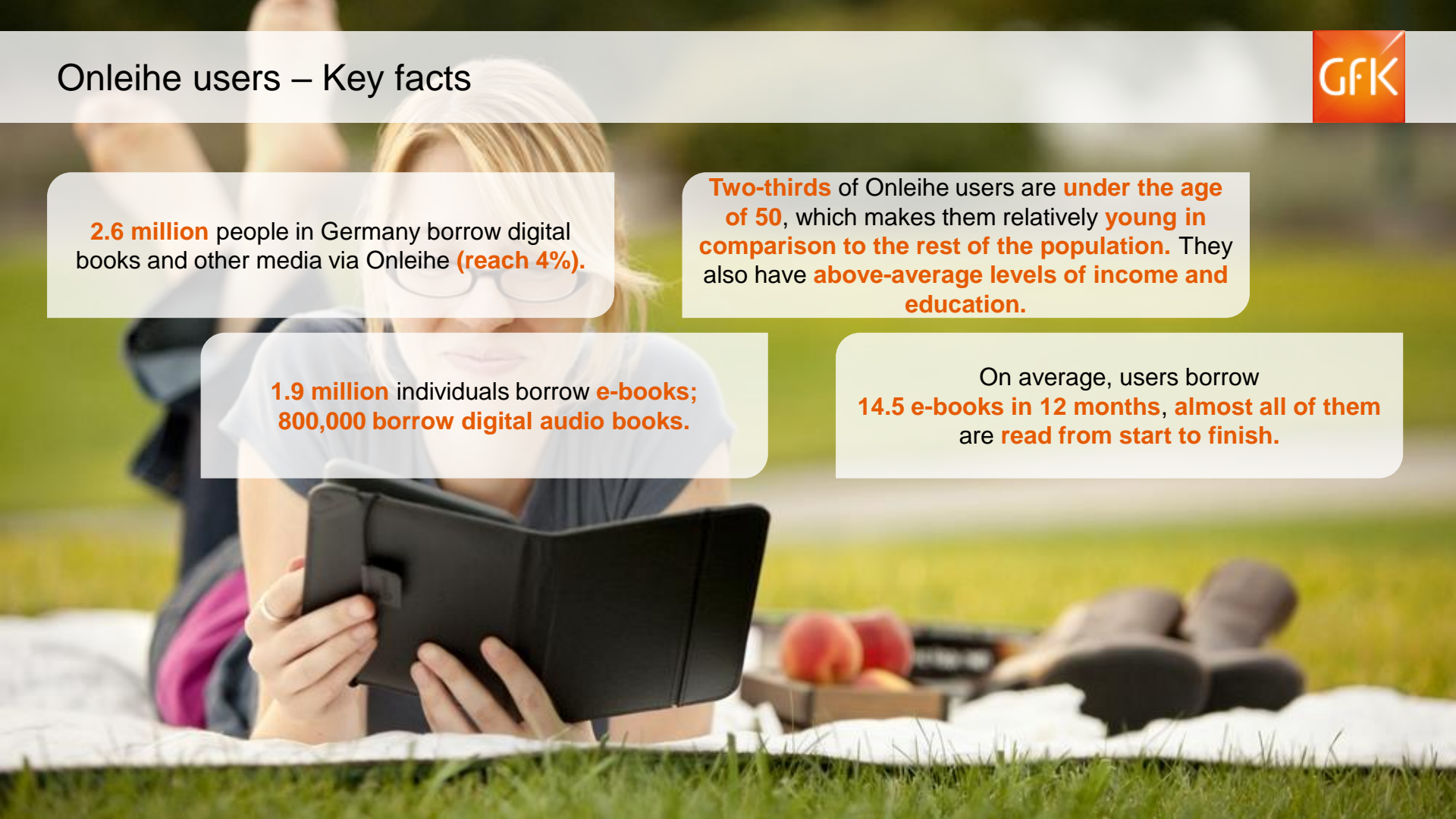
Onleihe users – Key facts

2.6 million people in Germany borrow digital books and other media via Onleihe (**reach 4%**).

Two-thirds of Onleihe users are **under the age of 50**, which makes them relatively **young in comparison to the rest of the population**. They also have **above-average levels of income and education**.

1.9 million individuals borrow **e-books**; **800,000** borrow **digital audio books**.

On average, users borrow **14.5 e-books in 12 months**, almost all of them are **read from start to finish**.

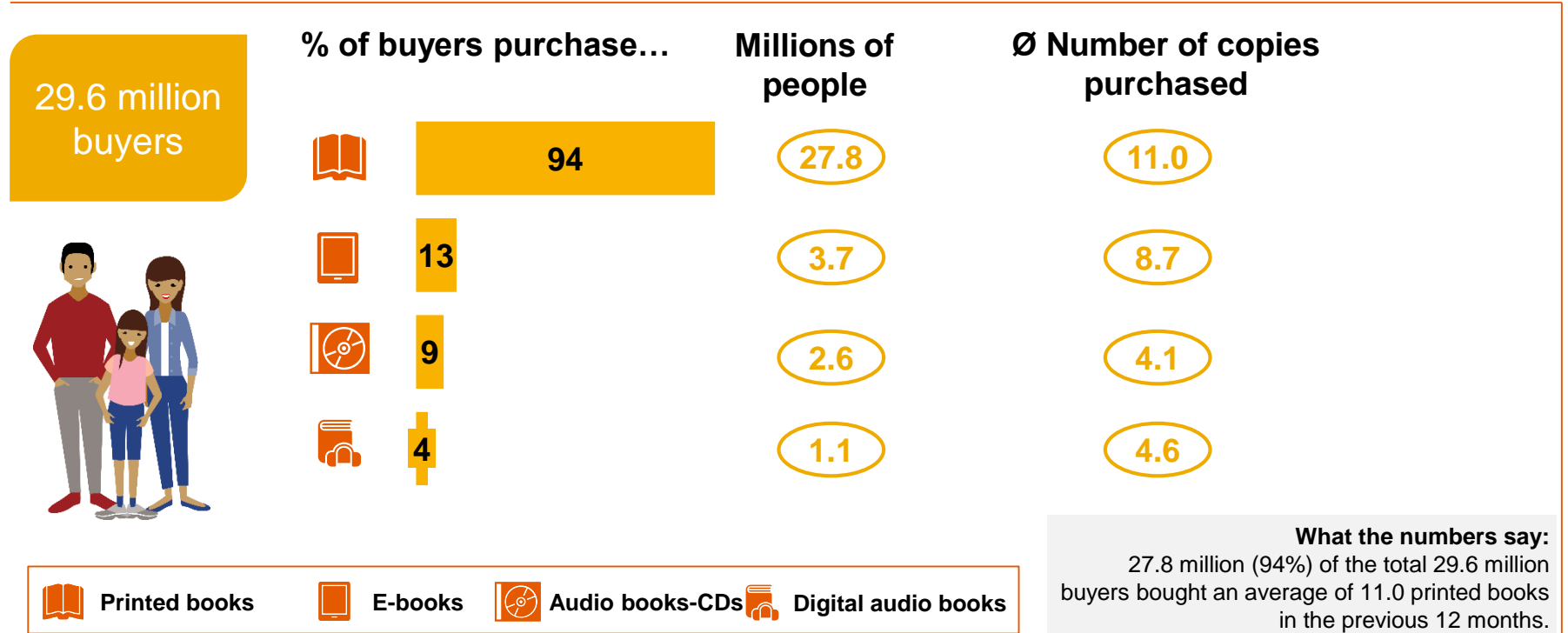


Overall buyers on the book market purchase 11 books on average in the space of one year.



Overview of book purchases

Buyers overall
29.6 million



Book market including audio books (physical + download) + e-books; Basis: Buyers in millions and in %; time period: July 2018 - June 2019

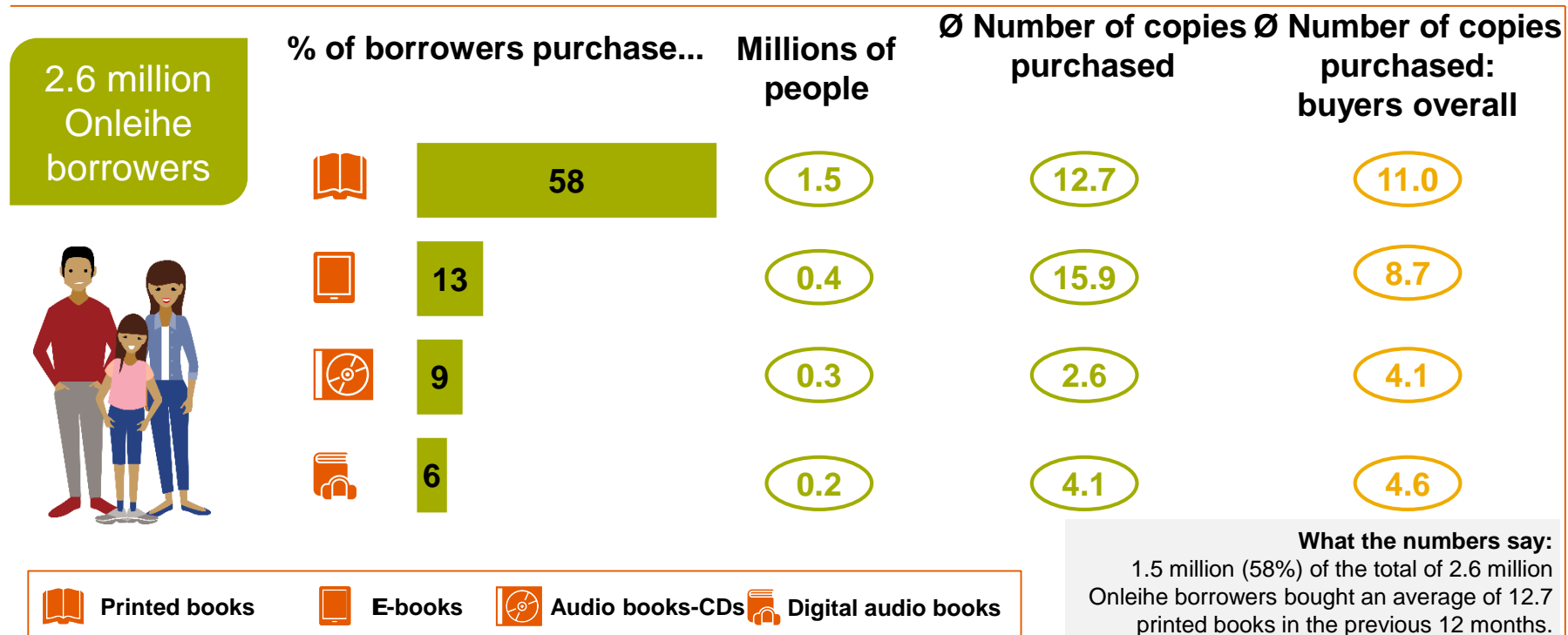
58% of Onleihe users are active in the physical book market; 13% are active in the digital book market. At a rate of 12.7 physical books and 15.9 e-books per year, Onleihe users purchase more books than the average book buyer.



Overview of media purchased

Onleihe borrowers

2.6 million

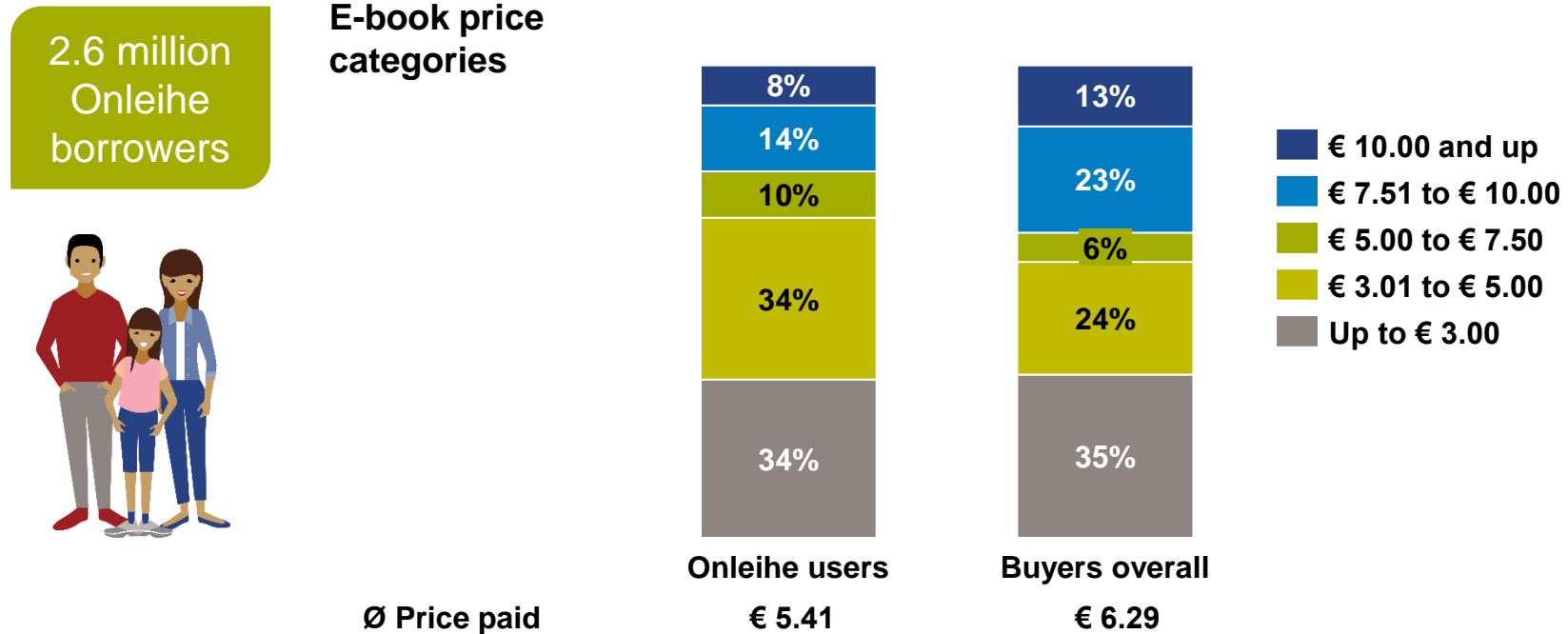


Book market including audio books (physical + download) + e-books; Basis: Buyers in million and in %; time period: July 2018 - June 2019

The general population spends an average of €6.29 on the purchase of one e-book. Onleihe users tend to purchase less expensive e-books, spending roughly € 5.41 on each purchased e-book.



Price range of e-books purchased: overall book market vs. Onleihe borrowers



Onleihe users who (continue to) purchase books/e-books tend to purchase more than average book buyers, however...



Ø Number of copies sold / million(s) of individuals

Buyers overall
29.6 million

Onleihe borrowers
2.6 million



Printed books

Buyers overall

11.0

27.8 million

Onleihe borrowers

12.7

1.5 million



E-books

Buyers overall

8.7

3.7 million

Onleihe borrowers

15.9

0.4 million

Book market including audio books (physical + download) + e-books; Basis: Buyers in million and Ø number of copies sold; time period: July 2018 - June 2019

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... they also tend to purchase fewer books, e-books and (digital) audio books after starting to use Onleihe. Onleihe has the least impact on consumers' buying behaviour in the realm of newspapers/magazines.



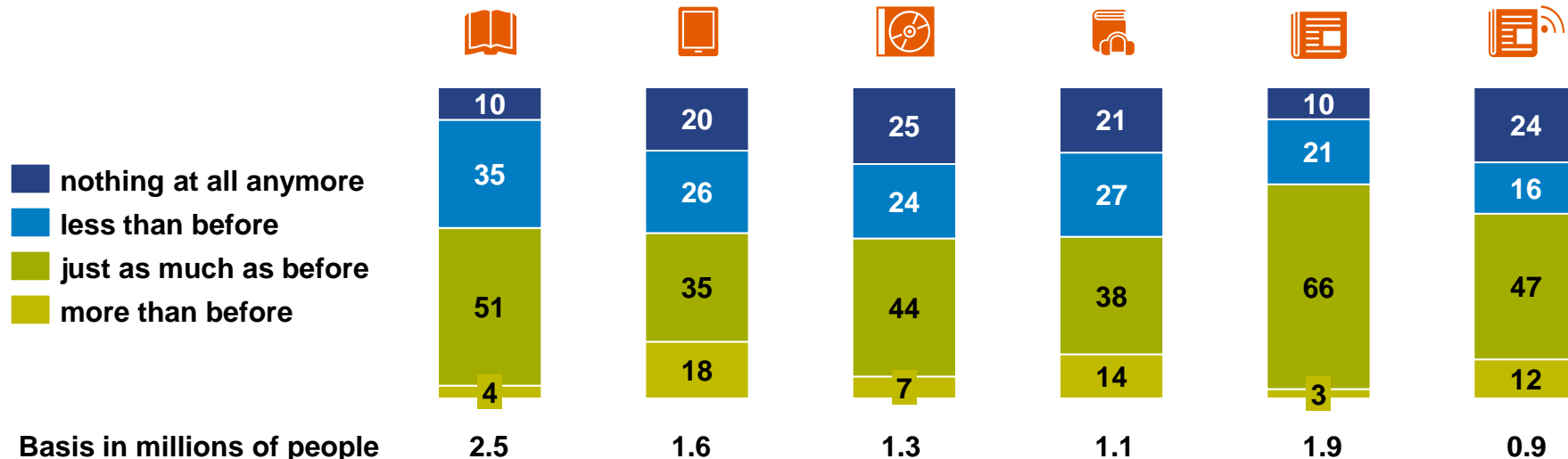
Buying behaviour in %

Taking into account only those consumers who had purchased the specific medium in the past

Onleihe borrowers

2.6 million

Ever since I started using Onleihe, I purchase



Printed books
 E-books
 Audio books-CDs
 Digital audio books
 Printed newspapers
 E-newspapers

Question 7b: Please indicate to what extent your buying behaviour changed since you started using Onleihe.

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16% of Onleihe users would purchase more printed books and/or e-books if Onleihe did not exist.

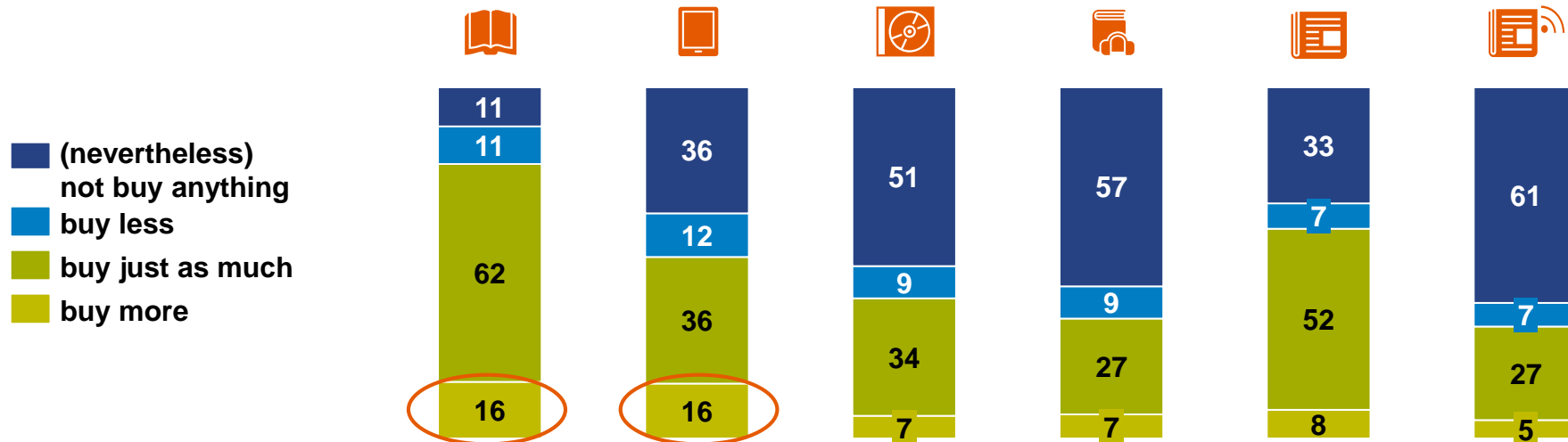


Onleihe borrowers

2.6 million

Buying behaviour in %

If public libraries were to stop offering Onleihe digital services, I would ...



Printed books

E-books

Audio books-CDs

Digital audio books

Printed newspapers

E-newspapers

Question 7c: Please indicate to what extent your buying behaviour would change if public libraries were to stop offering the services of Onleihe.

Onleihe users – Key facts

2.6 million people in Germany borrow digital books and other media via the Onleihe service (**4% reach**).

Two-thirds of Onleihe users are **under the age of 50**, which makes them relatively **young in comparison to the rest of the population**. They also have **above-average levels of income and education**.

1.9 million individuals borrow **e-books**; **800,000** borrow **digital audio books**.

Individuals borrow an average of **14.5 e-books** in the space of **12 months**; **almost all books** are **read from start to finish**.

Borrowers who also (continue to) **purchase books/e-books**, tend to **purchase more** than average buyers.

45% of Onleihe users **who were buyers** of printed books (**46%** in the case of e-books) **to date**, **bought few or none** of that medium **since starting to use Onleihe**.

16% of Onleihe users **would purchase more printed books and/or e-books**, if Onleihe did not exist.

Three-quarters of Onleihe users are satisfied with the scope/selection of e-books; more than two-thirds are satisfied with how up-to-date the selection is.

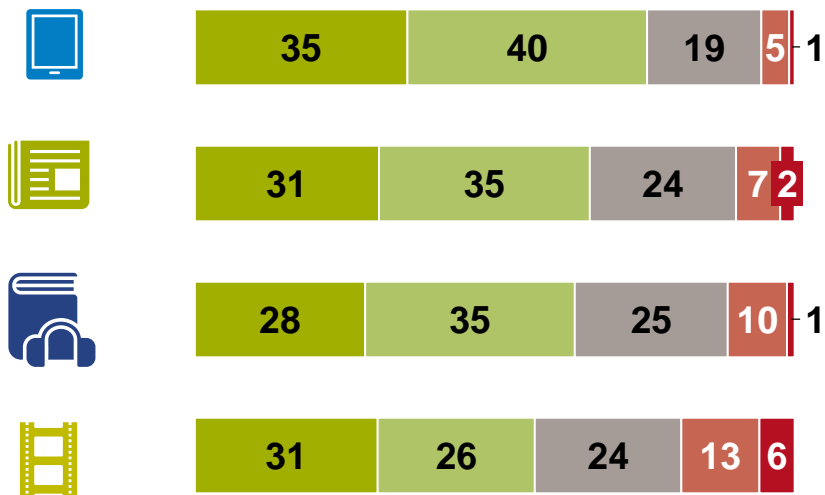


Satisfaction with the scope of Onleihe media products as well as how up-to-date they are*; ranked according to level of satisfaction (very satisfied/satisfied) in %

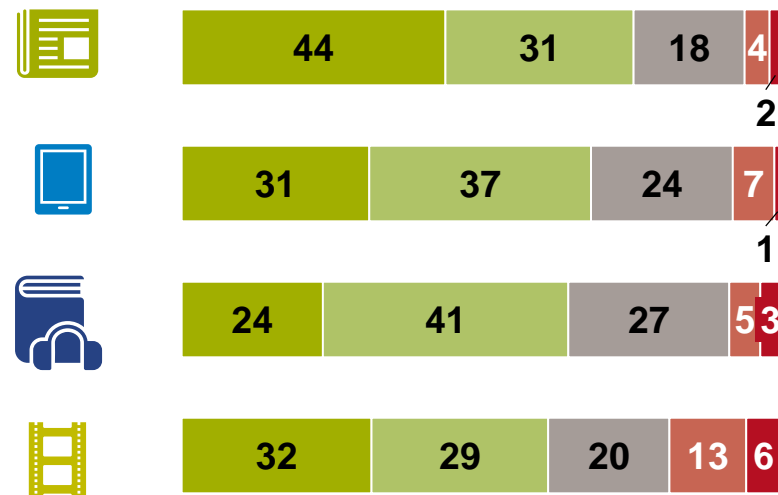
Onleihe borrowers

2.6 million

Satisfaction with scope/selection of Onleihe products



Satisfaction with how up-to-date Onleihe products are



Very satisfied Satisfied Not satisfied Not at all satisfied

Question 6a: How satisfied are you with the scope/selection of Onleihe media products?
 Question 6b: How satisfied are you with how up-to-date Onleihe media products are?

*Values calculated excluding responses indicating "I cannot say".

Onleihe users – Key facts



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16% of Onleihe users **would purchase more printed books and/or e-books** if Onleihe did not exist.

75% of Onleihe users are **(very) satisfied** with the scope/selection of **e-books** offered by Onleihe; **two thirds** are **(very) satisfied** with how **up-to-date** the selection is.

Summary

Review and evaluation of initial hypotheses

Hypothesis 1: Onleihe reaches consumers who are, for the most part, no longer active on the book market.



A majority of Onleihe consumers are active on the “traditional book market”; roughly two-thirds of them purchase books there.

Hypothesis 2: Onleihe has no impact on consumers’ buying behaviour on the book market.

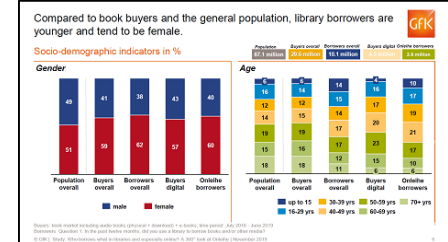
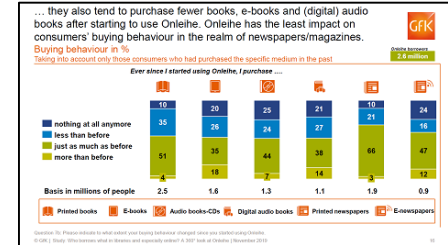
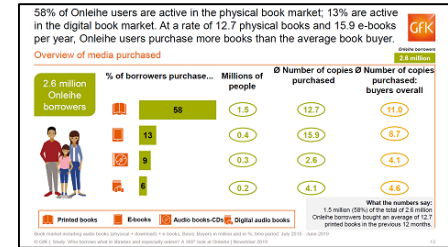


Almost half of Onleihe users purchased fewer or no books at all since they started using Onleihe.

Hypothesis 3: Onleihe reaches book-buying target groups, whose number of book purchases has declined.



Onleihe reaches an above-average number of very young people. It also reaches an above-average number of individuals in the 30-49-year-old target group – a group whose number of book purchases has declined.



Summary

Review and evaluation of initial hypotheses

Hypothesis 4: Individuals who borrow books via Onleihe do so for economic reasons.

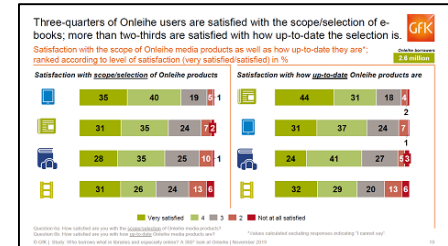
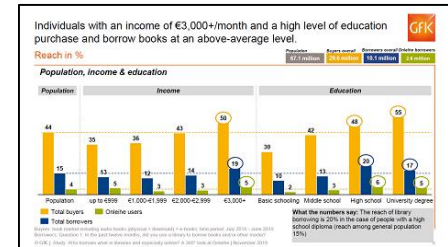


Onleihe consumers have above-average levels of income and education.

Hypothesis 5: Onleihe needs to offer more of the latest up-to-date book releases.



Onleihe consumers are satisfied with the scope and selection of Onleihe media products as well as with how up-to-date these products are.



Thank you very much!