



Freedonia Focus Reports  
US Collection

# Books: United States

April 2020



CLICK TO ORDER  
FULL REPORT

**BROCHURE**

CLICK TO ORDER  
FULL REPORT

[www.freedoniafocusreports.com](http://www.freedoniafocusreports.com)

# Table of Contents

---

<b>1. Highlights</b>	<b>3</b>
<b>2. Market Environment</b>	<b>4</b>
Historical Trends	4
Key Economic Indicators	6
Regulatory & Copyright Factors	7
<b>3. Segmentation &amp; Forecasts</b>	<b>9</b>
Media Type	9
Print	12
E-Books	13
Other Media	14
Markets	16
Textbooks	17
Professional, Technical, & Scholarly	19
Adult Trade	19
Children's	20
General Reference	22
<b>4. Industry Structure</b>	<b>24</b>
Industry Characteristics	24
Market Leaders	26
Bertelsmann	26
Holtzbrinck Publishing	27
Pearson	27
<b>5. About This Report</b>	<b>29</b>
Scope	29
Sources	29
Industry Codes	30
Freedonia Methodology	30
Resources	32

# List of Tables & Figures

---

Figure 1   Key Trends in US Book Publishing Revenues, 2019 – 2024	3
Figure 2   US Book Publishing Revenue Trends, 2009 – 2019	4
Table 1   Key Indicators for US Book Publishing Revenues, 2009 – 2024 (US\$ bil)	6
Figure 3   US Book Publishing Revenues by Media Type, 2009 – 2024 (US\$ bil)	9
Table 2   US Book Publishing Revenues by Media Type, 2009 – 2024 (US\$ mil)	9
Figure 4   US Book Publishing Revenues by Media Type Performance Index, 2009 – 2024 (2019=100)	10
Figure 5   US Survey: Influential Factors in Book Purchasing – Out of Store (%)	11
Figure 6   US Survey: Influential Factors in Book Purchasing – In-store (%)	11
Figure 7   US Book Publishing Revenues by Media Type, 2009 – 2024 (%)	14
Figure 8   US Book Publishing Revenues by Market, 2009 – 2024 (US\$ bil)	16
Table 3   US Book Publishing Revenues by Market, 2009 – 2024 (US\$ mil)	16
Figure 9   US Book Publishing Revenues by Market Performance Index, 2009 – 2024 (2009=100)	17
Figure 10   US Children’s Book Publishing Revenues w/ US Population Age 0-14, 2009 – 2024	22
Figure 11   US Book Publishing Revenues by Market, 2009 – 2024 (%)	23
Figure 12   US Book Publishing Revenues Concentration, 2002 – 2012 (%)	24
Table 4   Leading Suppliers to the US Book Publishing Market by Type	26
Table 5   NAICS & SIC Codes Related to Book Publishing	30

# About This Report

---

## Scope

This report forecasts to 2024 US book revenues in nominal US dollars. Total revenues are segmented by media type in terms of:

- print
- online
- other media such as audiobooks, CDs, and e-books published on physical media

Total revenues are also segmented by market as follows:

- textbooks
- professional, technical, and scholarly
- adult trade
- children's
- general reference

To illustrate historical trends, total revenues and the various segments are provided in annual series from 2009 to 2019.

Publishers who exclusively publish books online are excluded from the scope of this report. Revenues from activities other than book publishing, such as those from the sale or licensing of content rights, subscriptions to databases or other information, or from contract printing by publishers are also excluded.

This report includes the results of a proprietary national online consumer survey of US adults (age 18+). This Freedonia Focus Reports National Survey has a sample size of approximately 2,000, screened for response quality and representative of the US population on the demographic measures of age, gender, geographic region, race/ethnicity, household income, and the presence/absence of children in the household.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Books: United States* (FF25010) represents the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers

## About This Report

- government/public agencies
- intergovernmental organizations
- proprietary national consumer data
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group and Simba Information

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 5 | NAICS & SIC Codes Related to Book Publishing

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
323117	Books Printing	2732	Book Printing
323120	Support Activities for Printing	2789	Bookbinding and Related Work
424920	Book, Periodical, and Newspaper Merchant Wholesalers	5192	Books, Periodicals, and Newspapers
451211	Book Stores	5942	Book Stores
453310	Used Merchandise Stores	5932	Used Merchandise Stores
511130	Book Publishers	2731	Book Publishing

Source: US Census Bureau

## Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most

## About This Report

accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

## Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

## Resources

### The Freedonia Group

#### Freedonia Industry Studies

*Corrugated & Paperboard Boxes*

*Global E-Commerce*

*Global E-Commerce Packaging*

*Global Protective Packaging*

#### Freedonia Focus Reports

*Commercial Printing: United States*

*Communication Services: United States*

*E-Commerce: United States*

*Education: United States*

*Internet Content & Search: United States*

*Music Production & Publishing: United States*

*Newspaper Publishing: United States*

*Printing Machinery & Equipment: United States*

*Paper & Paperboard: United States*

*Recreation: United States*

#### Freedonia Custom Research

### Simba Information

*College Course Materials Trends and Outlook 2020-2022*

*Global Medical Publishing 2019-2023*

*Global Scientific & Technical Publishing 2019-2023*

*Global Social Science and Humanities Publishing 2018-2022*

*Open Access Book Publishing 2018-2022*

*Publishing for the PreK-12 Market 2019-2020*

*Scholarly & Professional E-Book Publishing 2018-2022*

### Trade Publications

*Book Business*

*Digital Book World*

*PostPress*

*Printing Impressions*

*Publishers Weekly*

### **Agencies & Associations**

American Booksellers Association

Association of American Publishers

The Authors Guild

Book Industry Study Group

International Publishers Association

US Bureau of Economic Analysis

US Census Bureau