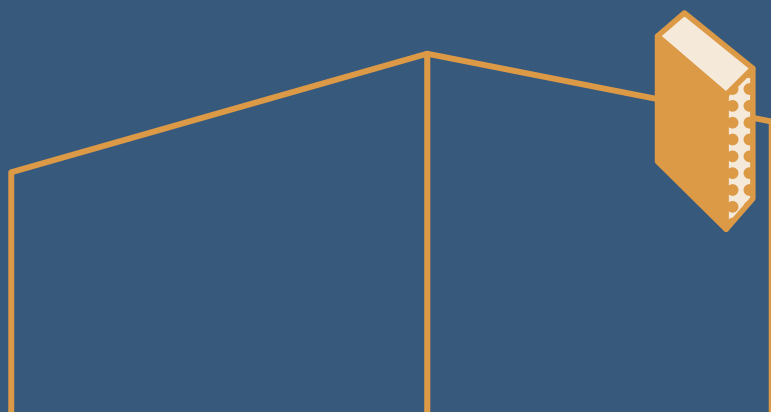


Publication Industry Status Survey

2019



한국출판문화산업진흥원
Publication Industry Promotion Agency of Korea



Section 1 Project Overview

● Survey Summary

- Project title: The 2019 Publication Industry Status Survey (including book copyright export statistics)
- Legal ground: “Research on the current status of the publishing industry and compilation of statistics” of the Publishing Industry Promotion Act (Article 16-4)
- This survey aims to provide a basic database for the formulation/ assessment of publication policies, development of business management plans, and research activities by academia and research institutes by identifying the current status of publication enterprises and the size of the industry.

● Survey Period & Method

- Reference date: December 31, 2018
- Reference period: January 1 – December 31, 2018
- Survey duration: May 3 – October 30, 2019
 - Organization of preliminary population & target population: May 3 – September 30, 2019
 - Publication industry status survey: May 3 – October 30, 2019
- Method: Phone, fax, e-mail, or offline sessions by investigators, using a structured survey sheet (questionnaire)
- Book copyright export statistics: Identified enterprises with actual export records, obtained limited lists and information on exports, and categorized the data by year, sector, and country for analysis.

● Involved Agencies

- Hosted by the Ministry of Culture, Sports and Tourism and the Publication Industry Promotion Agency of Korea
- Conducted by the Publication Industry Promotion Agency of Korea
- Coordinated with the Korean Publishers Association, Korea Publisher Society, and the Korea Federation of Bookstore Association
- Due diligence by Maven Square Co. Ltd.

Section 2 Population Analysis & Size of Publication Industry

Prior to the survey, an investigation was conducted into the population to identify whether the enterprises were still in business and to confirm a number of key facts (sales, number of employees, main publication field). Then, the final population was determined, to whom the questionnaire was distributed, and the responses were analyzed.

● Population Investigation

- The primary goal of this survey was to conduct a complete enumeration of approximately 50,000 nominal publishing houses, 7,000 publication distributors, and 5,000 e-book companies to identify their characteristics and basic status to allow for a scientific sample survey in the future.
- For the purpose of the survey, the population lists were put together and analyzed.
 - ① “Preliminary population”: enterprises categorized by publication field (duplications excluded)
 - ② “Target population”: enterprises engaged in the publication business (temporary/permanent closure checked)
 - ③ “Survey population”: enterprises with sales performance in 2018
- A three-month long investigation conducted into the preliminary population determined the final survey population of 6,494 enterprises (3,404 publishers; 2,326 distributors; and 961 e-book companies).

Survey Population Determination

Unit: enterprise

Category		Preliminary Population	Target Population	Survey Population
Publisher		44,342	5,402	3,404
Publication Distributor	Offline bookstore	5,182	2,590	1,744
	Online bookstore	682	263	205
	Wholesale/ Sole distribution	1,263	1,050	377
E-Book Enterprise	E-book distributor	263	33	29
	E-book publisher	5,402	3,404	932
Definition		Duplication checked	Temporary/permanent closure, out-of-service numbers crossed out (including rejection)	Those with sales record in 2018, in the target population

※ Among the 3,404 publishers, 625 were also involved in e-book publishing.

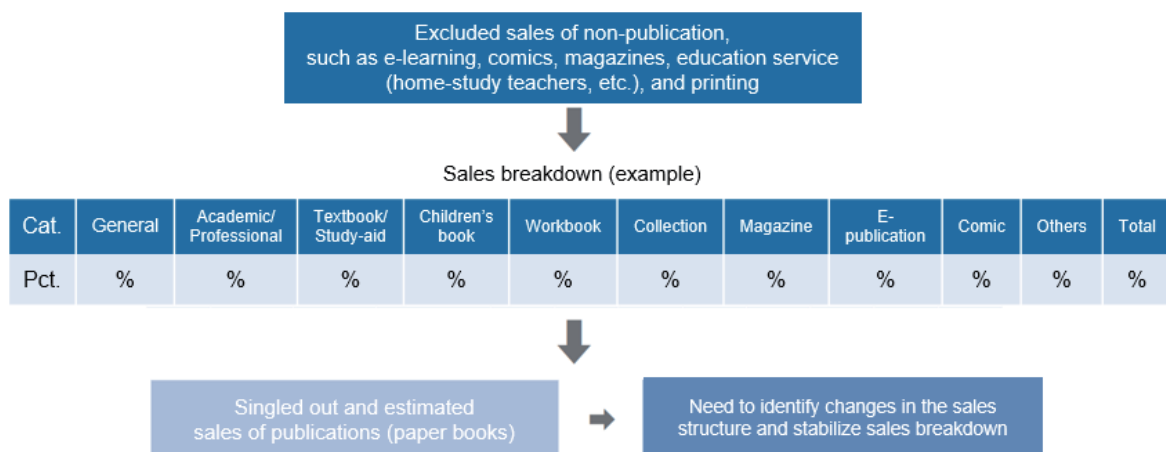
● Estimated Size

- This survey estimates the amount of sales and size of workforce of enterprises involved in the production and distribution stages in the publishing value chain comprised of production–distribution–consumption.

Criteria in Estimating the Size of Publishing Business

- Only the sales in the paper book market were taken into account in estimating the size of publishing business for 2018.
- Those not related to online or offline paper book sales, such as e-learning, education (home-study teachers, etc.), electronic publication, magazine, comics, and other (lease, etc.), were excluded, which may be viewed as an underestimation by industry standards.

Publisher Sales: Amount and Percentage by Type



Estimated Size of Publishing Business

- 3,404 publishers (survey population) responded to the questions necessary in estimating the business size in Korea. The sales amounted to approximately KRW 3,908.3 billion, and the number of employees, 27,086.

Sales Amount & Workforce Size for 2018

Unit: enterprise, KRW million, pax

Category	Population	Respondent	Sales ('18)	No. of Employees ('18)
General book	2,283	678(687)	717,386	7,187
Academic/Professional	619	229(253)	206,032	2,465
Textbook/Study-aid	212	44(52)	925,213	6,411
Children's Book	172	92(94)	136,325	1,002
Workbook	98	23(25)	1,414,505	7,753
Collection	20	11	508,211	2,268
Total	3,404	1,077(1,122)	3,908,372	27,086

- Annual sales comparison revealed that the figure in 2018 went down by 0.1% from the previous year, and the annual rate of change decreased by 2.0% on average. The largest drop was recorded in the collection area. All in all, the publishing business continued a downward trend but to a lesser degree.

No. of Publishers in Population

Unit: enterprise, %

Category	2014	2015	2016	2017	2018	ROC from Previous Year	Average Annual ROC
General book	1,876	2,325	2,173	2,251	2,283	1.4%	5.0%
Academic/Professional	1,001	693	708	694	619	-10.8%	-11.3%
Textbook/Study-aid	260	239	266	233	212	-9.0%	-5.0%
Children's Book	240	216	101	148	172	16.2%	-8.0%
Workbook	158	126	176	132	98	-25.8%	-11.3%
Collection	28	24	18	15	20	33.3%	-8.1%
Total	3,563	3,623	3,442	3,473	3,404	-2.0%	-1.1%

Publisher Sales

Unit: KRW million, %

Category	2014	2015	2016	2017	2018	ROC from Previous Year	Average Annual ROC
General book	805,328	760,215	712,365	718,791	717,386	-0.2%	-2.8%
Academic/Professional	218,551	212,198	209,448	207,304	206,732	-0.3%	-1.4%
Textbook/Study-aid	967,382	944,155	928,383	925,216	925,213	0.0%	-1.1%
Children's Book	149,322	139,009	137,713	136,758	136,325	-0.3%	-2.3%
Workbook	1,508,391	1,443,520	1,421,352	1,415,069	1,414,505	0.0%	-1.6%
Collection	581,697	528,753	516,771	509,059	508,211	-0.2%	-3.3%
Total	4,230,671	4,027,850	3,926,032	3,912,197	3,908,372	-0.1%	-2.0%

No. of Employees of Publishers

Unit: person, %

Category	2014	2015	2016	2017	2018	ROC from Previous Year	Average Annual ROC
General book	8,218	7,847	7,682	7,218	7,187	-0.4%	-3.3%
Academic/ Professional	2,809	2,735	2,711	2,480	2,465	-0.6%	-3.2%
Textbook/ Study-aid	6,617	6,550	6,486	6,429	6,411	-0.3%	-0.8%
Children's Book	1,137	1,064	1,048	1,007	1,002	-0.5%	-3.1%
Workbook	8,259	7,919	7,839	7,762	7,753	-0.1%	-1.6%
Collection	2,539	2,368	2,325	2,273	2,268	-0.2%	-2.8%
Total	29,579	28,483	28,091	27,169	27,086	-0.3%	-2.2%

Criteria in Estimating the Size of Publication/E-Book Distributors

- The size of publication distributors and e-book enterprises as of 2018 was estimated based on the size of population, using mean imputation (across-the-board application of the average response). As for e-book enterprises, the survey estimated only the size of e-book distributors.
- In the 2018 survey, the sales of e-book distributors refer to sales from distribution only, not from e-publication including magazines and comics. This may be viewed as an underestimation by the industry standards.
- As for the e-publication industry, a reasonable size estimate based on the value chain can be made only when the investigation into e-publication producers and service providers is conducted simultaneously. Therefore, it was excluded from the survey. The 2018 status survey was restricted to enterprises related to e-books, and to e-book distributors for size estimation.

Since this is the second estimation of the size of publication/e-book distributors as of 2018, the numbers may change depending on the results of the 2019 survey (performed in 2020).

Estimated Size of Publication Distributors

- The population included 2,326 enterprises in 2018. The estimated sales in the national publication distribution industry recorded approximately KRW 3,625.1 billion, out of which the offline sales took up the largest share of KRW 1,566.2 billion.

No. of Publication Distributors in Population

Unit: enterprise, %

Category	2014	2015	2016	2017	2018	ROC from Previous Year	Average Annual ROC
Offline Bookstore	1,756	1,754	1,820	1,661	1,744	4.9%	-0.2%
Online Bookstore	119	144	156	164	205	25.0%	14.6%
Wholesale/Sole Distribution	330	316	336	301	377	25.2%	3.4%
Total	2,205	2,214	2,312	2,126	2,326	9.4%	1.3%

Publication Distributor Sales

Unit: KRW million, %

Category	2014	2015	2016	2017	2018	ROC from Previous Year	Average Annual ROC
Offline Bookstore	1,428,686	1,380,101	1,384,241	1,308,984	1,269,198	-3.0%	-2.9%
Online Bookstore	1,228,149	1,183,836	1,369,698	1,484,595	1,566,285	5.5%	6.3%
Wholesale/Sole Distribution	898,236	872,087	839,664	791,275	789,652	-0.2%	-3.2%
Total	3,555,071	3,436,024	3,593,603	3,584,854	3,625,135	1.1%	0.5%

No. of Employees of Publication Distributors

Unit: person, %

Category	2014	2015	2016	2017	2018	ROC from Previous Year	Average Annual Rate of Change
Offline Bookstore	6,443	6,290	6,328	6,153	6,117	-0.6%	-1.3%
Online Bookstore	3,049	3,002	3,086	3,162	3,175	0.4%	1.0%
Wholesale/Sole Distribution	3,012	2,917	2,823	2,684	2,681	-0.1%	-2.9%
Total	12,504	12,209	12,237	11,999	11,973	-0.2%	-1.1%

Estimated Size of E-Book Distributors

- The population included 29 enterprises for 2018, and 15 of them responded. The estimated sales of national e-book distributors recorded approximately KRW 270.2 billion.

No. of E-Book Distributors in Population

Unit: enterprise, %

Category	2014	2015	2016	2017	2018	ROC from Previous Year	Average Annual ROC
E-Book Distributor	68	21	26	27	29	7.4%	-19.2%
Total	68	21	26	27	29	7.4%	-19.2%

E-Book Distributor Sales

Unit: KRW million, %

Category	2014	2015	2016	2017	2018	ROC from Previous Year	Average Annual ROC
Genre Fiction (except for webnovels)	40,246	57,385	62,185	71,954	81,216	12.9%	19.2%
General	40,848	35,126	41,382	47,875	53,579	11.9%	7.0%
Webnovel	19,269	33,312	53,218	99,522	135,407	36.1%	62.8%
Total	100,363	125,823	156,785	219,351	270,202	23.2%	28.1%

No. of Employees of E-Book Distributors

Unit: person, %

Category	2014	2015	2016	2017	2018	ROC from Previous Year	Average Annual ROC
E-Book Distributor	–	436	680	726	963	32.6%	30.2%
Total	–	436	680	726	963	32.6%	30.2%

The 2019 Publication Industry Status Survey Summary (reference year: 2018)

• Publisher

Category	Sub-Category	Survey Result	
General Status	Management type	· General (full-time) 70.4%, publishing as part of business (magazine publisher, printing house) 19.2%, affiliated (business/media/public/organization, etc.) 6.7%, other (religious corporation, educational foundation, etc.) 3.7%	
	Company type	· Private 67.1%, corporation 24.8%, incorporated foundation 4.2%, incorporated association 2.0%, other 2.0%	
	Main field	· General 60.4%, academic/professional 20.4%, toddler/children 8.2%, exam preparation 4.0%, textbook & study-aid 3.9%, workbook 2.0%, collection 1.0%	
	Main field in detail	· Published: humanities (lit. not included) 36.5%, literature 25.2%, academic 16.5%, college textbook 13.6%, professional 12.8%, social science 12.2% · First priority: humanities (lit. not included) 20.3%, literature 14.3%, college textbook 6.8%, academic 6.0%, art/pop culture 4.7%, professional 4.5%	
	No. of employees	· Changes in number: decreased 10.4%; similar 83.9%; increased 5.7% · Personnel hired: 442 in total (243 new + 199 experienced); 162 men (83 new + 79 experienced) / 280 women (160 new + 120 experienced)	
	Welfare	· Social insurance 95.0%, severance pay 80.5%, employment contract 72.6%, annual leave 70.4%, overtime pay/benefit 37.2%, parental leave 30.4%, capacity development (cost coverage, education, etc.) 28.8%, flexible working hours (flextime, discretionary working hours, etc.) 27.4%, long service leave 22.2%	
	Standard contracts	· Awareness of existence	Aware 51.3%, unaware 48.7%
		· Actual usage	Partial paragraphs of the contracts 40.8%, all contracts as designated by the government 37.1%, own form of contracts 22.1%
		· Type of standard contracts in use	Publishing rights 71.2%, publishing rights and exclusive settings 35.2%, transfer of author's property rights 14.8%, exclusive publishing rights 13.0%, book publishing rights 12.4%, work usage permission (for outside Korea) 12.4%, monopolistic publication permission 9.3%
		· Reason for not using	Situations cause changes to contracts 84.1%, previous contracts are more convenient 10.8%, work as disadvantage to publishers 1.3%, other 3.8%
Financial Status	Sales Status in detail	· Domestic 98.0% + overseas 2.0% / paper book 96.2% + electronic book 3.8% domestic author 78.1% + translated work 21.9% / old release 52.9% + new release 47.1%	
	Changes in sales	· Increased 14.4%, similar 55.5%, decreased 30.0%	
	Key tasks for sales increase	· Stronger planning 33.2%, discover new authors/content 25.2%, stronger marketing/PR 15.1%, diversify (expand, deepen) publication fields 10.0%, stronger expertise and liberty of staff 3.9%, enter other industries (diversify) 3.7%, increase digital content 3.1%, international copyright/publication trade 0.9%, other 4.8%	

2019 Publication Industry Status Survey

Category	Sub-Category	Survey Result			
Financial Status	Annual spending breakdown	·Production (rent, printing, bookbinding) 30.1%, personnel 24.1%, operating (office expense, storage fee) 12.9%, editing (editing, design) 11.4%, royalties/manuscript fee 11.3%, marketing (ad, PR) 3.8%, other 6.3%			
	Operating profit margin	·Operating profit margin: 18.4% ·Profitability: increased 13.4%, similar 47.4%, decreased 39.3%			
	OSMU sale	·No 90.1%, yes 9.9%			
Publication Status	New release	No. of new releases: 20.9	Copies of new releases: 2,391.2	New translations: 8.6	New releases, printed twice or more: 30.6%
	First printing of first edition	·Copies published: 1,217.6 in 2018, 1,548.7 in 2015			
		·Copies released: 804.2 in 2018, 1,051.5 in 2015			
		·Sales completion: within 17.3 months in 2018, 14.3 months in 2015			
	First printing sold online	·39.3% in 2015 ► 46.2% in 2018			
	First edition	·1,302.5 copies in 2017 ► 1,166.3 copies in 2018			
Business Status	Initial delivery	·591.4 copies in 2017 ► 541.8 copies in 2018			
	Sales breakdown by business partner	·Large bookstore 23.9%, online bookstore 21.4%, wholesale/sole distribution 16.6%, direct sales by publisher 15.9%, sales to institutions 9.2%, small to mid-sized bookstore 6.0%, open market 1.3%, discount store 0.5%, social commerce 0.3%, other 4.8%			
	Contract supply	·Offline wholesale 64.9%, direct transaction offline bookstore 68.8%, online distribution 66.2%			
	Returned	·16.7% on average			
	No. of direct business bookstores	·39.3 in 2017 ► 39.1 in 2018			
	No. of Internet bookstores in business with	·4.9 in 2017 ► 5.0 in 2018			
	No. of wholesalers in business with	·11.7 in 2017 ► 11.1 in 2018			
Marketing Status	Bill transaction	·General 17.2%, academic/professional 18.9%, children's book 13.4%			
	Current PR/marketing method	Publisher website 15.9%, social media (Facebook, Twitter, etc.) 10.4%, online forum/blog 9.1%, offline bookstore (display stand rental, etc.) 7.3%, newspaper 6.2%, online bookstore (banner ad, etc.) 5.7%, portal website 4.1%, book list/catalog 3.4%, magazine/in-house newsletter 2.7%, email 2.2%, introduction/recommendation by acquaintance/influencer 2.2%, book signing event/author's lecture 1.1%, TV/radio 1.0%, ad on book band/flap 0.8%, presents (prize, etc.) 0.5%, Podcast/YouTube/video 0.4%, other 1.9%, no specific activity 25.2%			

Category	Sub-Category	Survey Result				
Marketing Status	Most effective PR/marketing	Social media (Facebook, Twitter, etc.) 22.3%, TV/radio 15.5%, portal website 11.8%, online bookstore (banner ad, etc.) 8.9%, online forum/blog 7.0%, publisher website 6.4%, Podcast/YouTube/video 6.4%, introduction/recommendation by acquaintance/influencer 4.9%, newspaper 4.2%,		offline bookstore (display stand rental, etc.) 4.0%, book list/catalog 1.9%, magazine/in-house newsletter 1.6%, book signing event/author's lecture 1.5%, email 1.0%, presents (prize, etc.) 0.4%, ad on book band/flap 0.1%, other 1.4%, no specific activity 0.5%		
	Marketing strategy using reader base	·Positive 13.2% (strongly agree 3.4% + agree 9.8%), neutral 21.7%, negative 65.1% (disagree 32.5% + strongly disagree 32.6%)				
	To be improved in publication distribution	Fixed book price system 25.1%, logistics-centered distribution structure 15.2%, individual purchasing power 15.2%, purchasing power of institutions (library, etc.) and supply system 13.8%, quality/drawing power of publication content 9.7%,		transparent/reasonable business relationship, bill drawing ban 7.0%, informatization of publication distribution 6.4%, mutual consultative body organized between publishers, bookstores, and libraries 5.2%, stronger authority of Publication Distribution Deliberation Committee 0.6%, other 1.9%		
Awareness	E-book publication	·No 67.2%, yes 32.8%				
	Necessity & potential of functions	Category	Necessity		Potential	
		Paperback release	Yes 50.4%, neutral 39.2%, no 10.4%	3.6 points	High 33.7%, average 46.7%, low 19.6%	3.2 points
		Text e-book	Yes 58.9%, neutral 29.8%, no 11.3%	3.7 points	High 54.8%, average 33.2%, low 12.0%	3.6 points
		Multimedia e-book	Yes 51.1%, neutral 33.2%, no 15.8%	3.5 points	High 47.0%, average 36.1%, low 16.9%	3.4 points
		Audio book release	Yes 39.8%, neutral 36.6%, no 23.6%	3.2 points	High 35.3%, average 40.9%, low 23.8%	3.2 points
		POD	Yes 40.1%, neutral 39.0%, no 20.8%	3.2 points	High 30.8%, average 42.8%, low 26.3%	3.1 points
		OSMU (derivative works)	Yes 42.6%, neutral 40.9%, no 16.4%	3.3 points	High 38.1%, average 41.3%, low 20.6%	3.2 points
Requirements for industry growth	Discover/nurture authors 21.2%, foster reading culture 21.1%, increase book purchasing budget for libraries 13.5%, informatize/improve distribution environment 9.6%, digitization/informatization 9.4%, reinforce digital publications (e-book, mobile, audio book) 5.3%,		nurture/train experts 5.3%, negotiating power/supply rate 4.9%, better marketing 4.9%, create sales profit from other sources (OSMU, IP, etc.) 3.3%, other 1.4%			
Received support	·Yes 27.2%, no 72.8%					
Necessary statistics (by rank)	·Consumption (book purchasing behavior, etc.) 52.4%, distribution/logistics (transaction/logistics status, etc.) 28.9%, production (details about released books, etc.) 11.2%, usage (book checkout status at libraries, etc.) 7.5%					

• E-Book Publisher

Category	Sub-Category	Survey Result	
General Status	Management type	·Paper book-based 93.6%, e-book only 6.4%	
	Company type	·Private 62.5%, incorporated 37.5%	
	Main field	·General (except for genre fiction) 88.0%, genre fiction (romance, fantasy, martial arts, sci-fi, etc.) 8.4%, comic/webtoon/graphic novel 1.3%, magazine 0.3%, other 2.0%	
	Manpower for e-book business	·Handles e-book only: 0.6, e-book as a part of the job: 2.1	
	No. of employees	·Changes in number: increased 2.3%, similar 96.0%, decreased 1.7% ·Personnel hired: 1.4	
Sales Status	Sales & sales breakdown	·E-book sales in 2018	KRW 139.9 million
		·Changes in sales	Increased 12.4%, similar 79.3%, decreased 8.4%
		·Sales by type	General 79.1%, genre fiction 10.7%, comic (incl. webtoon) 2.6%, other (magazine, etc.) 7.6%
		·Sales by format	Text e-book 91.2%, multimedia e-book 5.6%, audio book 1.0%, e-book with AR, VR 0.4%, other 1.8%
		·Sales by distribution channel	Online bookstore 39.0%, e-book website 32.7%, institution (e-book library, etc.)/organization 9.0%, mobile content provider (Korea Publishing Contents, etc.) 8.0%, company website (direct sales) 3.5%, mobile telecommunications/portal website 1.7%, global platform (Google, Apple, etc.) 0.9%, other 5.0%
		·Sales by business type	B2C (direct sales/lending to consumers) 69.7% (one volume edition (single copy)/series (set) sales 66.2%, (flat rate pricing (rental/content voucher) 3.9%), B2B (sales to institution/organization) 24.4%, B2BC (websites linked, profit distributed afterward) 5.5%
	OSMU sale	·No 99.0%, yes 1.0%	
Business, Production, Sale Status	Export overseas	·No 90.9%, yes 9.1%	
	No. of authors on contract	·116.1	
	No. of published e-books	·138.7 e-books, accumulated	
		·Produced 28.3 e-books in 2018	
Business, Production, Sale Status	Converted from paper	·Converting rate for 2018: 56.6%	

Category	Sub-Category	Survey Result	
Business, Production, Sale Status	Production breakdown	·By type	General (except for genre fiction) 81.5%, genre fiction (romance, fantasy, martial arts, etc.) 9.9%, other (magazine, etc.) 6.8%, comic (incl. webtoon) 1.9%
		·By format	Text e-book (text) 93.0%, multimedia (audio/video) e-book 4.6%, audio book (incl. appendix) 0.8%, e-book with AR/VR (new tech) 0.0%, other 0.9%
		·By producer	Publisher 47.6%, outsourced 52.4%
	Current PR/marketing method	Publisher website 11.0%, social media (Facebook, Instagram, etc.) 10.4%, exposure on e-book website 7.7%, online bookstore/shopping mall ad 6.0%, online forum/blog 5.7%, portal website 5.0%, newspaper/magazine/in-house newsletter 2.7%,	other website 1.7%, email 1.0%, ad at offline bookstore 1.0%, TV/radio 0.7%, Podcast/YouTube/video 0.7%, ad loaded on device 0.3%, other 0.3%, no specific activity 44.8%
	Most effective PR/marketing	Social media (Facebook, Instagram, etc.) 15.3%, exposure on e-book website 12.7%, portal website 10.1%, online bookstore/shopping mall ad 9.3%, TV/radio 7.8%, Podcast/YouTube/video 5.6%, publisher website 3.7%, newspaper/magazine/in-house newsletter 3.4%, online forum/blog 3.0%,	Mobile app ad 1.5%, other websites 0.4%, email 0.4%, ad at offline bookstore 0.4%, transit/outdoor ad 0.4%, other 0.4%, no specific activity 25.7%
	Marketing strategy using reader database	·Positive 8.9% (strongly agree 0.8% + agree 8.1%), neutral 23.9%, negative 67.2% (disagree 41.3% + strongly disagree 25.9%)	
Changes in Environment & Outlook	Perception of e-book price against paper book price	·Current e-book price 67.7%, ideal e-book price 64.2%	
	E-publication market outlook	·2019: growth potential of e-publication industry, 108.2 (genre fiction 114.7, general (except for genre fiction) 101.7, text e-book 104.5, multimedia e-book 105.5, audio book 111.8, webnovel 116.4), company's growth potential (e-book publishing) 105.8	
		·2020: growth potential of e-publication industry, 119.0 (genre fiction 130.8, general (except for genre fiction) 110.5, text e-book 115.4, multimedia e-book 114.9, audio book 125.9, webnovel 129.8), company's growth potential (e-book publishing) 114.3	
	Effective method for e-book sales increase	Preview (free content) 38.9%, mobile-friendly content 14.8%, content curation 12.7%, exposure on main web page 10.7%, subscription model (flat rate) 4.5%,	serial model 4.1%, partial (chapter, segment) sales 3.7%, mileage benefit 3.7%, partial charging (incl. in-app payment) 3.3%, bundle (combined) sales 1.6%, event (contest, etc.) 0.8%, other 1.2%

Category	Sub-Category	Survey Result				
Changes in Environment & Outlook	Critical tasks for e-publication market growth	Acquire abundant content 53.4%, improve content quality 17.0% develop easy-to-use interface 8.3%, achieve price competitiveness (appropriate price) 5.9%, offer customized content recommendation 3.6%, expand supply of dedicated device 3.2%, ensure easy discovery of content (thru PR, etc.) 3.2%,			achieve DRM flexibility (compatibility) 1.6%, diversify service models 1.6%, foster self-publishing 0.8%, partnership efforts (to reduce cost, etc.) 0.8%, boost interactive/multimedia e-book 0.4%, other 0.4	
Diversified E-Publication	Necessity & potential of functions	Category	Necessity		Market potential	
		Audio/video	Yes 44.6%, neutral 46.6%, no 8.8%	3.4 point	High 44.9%, average 41.8%, low 13.3%	3.4 point
		App/e-pub 3.0 (multimedia)	Yes 49.0%, neutral 41.2%, no 9.8%	3.4 point	High 46.0%, average 41.2%, low 12.8%	3.4 point
		Audio book	Yes 46.0%, neutral 44.4%, no 9.6%	3.4 point	High 40.6%, average 44.4%, low 15.0%	3.3 point
		Webnovel	Yes 39.7%, neutral 48.3%, no 12.1%	3.3 point	High 55.4%, average 36.3%, low 8.3%	3.6 point
		AR & VR	Yes 37.6%, neutral 39.4%, no 22.9%	3.1 point	High 43.9%, average 36.6%, low 19.5%	3.2 point

• Wholesale / Sole Distribution

Category	Sub-Category	Survey Result		
General Status	Company type	·Private 86.5%, incorporated 13.5%		
	Wholesale & retail	·Wholesale only 25.3%, both wholesale and retail 74.7%		
	Operation period	·21.7 years		
	Storage status	·Warehouse size: 371.2 m ² (112.5 pyeong)	·Storage capacity: 834,000 copies	·Warehouse utilization: 70.9%
	Main field	·Study-aid/workbook for primary/secondary education 50.6%, general 27.5%, children's book (collection, single volume) 6.2%, special field 6.2%, college textbook/professional/exam preparation 5.1%, magazine/comic 4.5%		
	No. of employees	·Changes in number: increased 5.1%, similar 75.8%, decreased 19.1%		
		·Personnel for logistics: 2.4		
·Personnel hired: 2.3				
Management Status	Sales	·Publication sales	Publication 90.2%, other 9.8%	
		·Changes in sales	Increased 5.1%, similar 47.5%, decreased 47.5%	
		·Sales by type	Study-aid 57.1%, general 25.8%, children's book (collection, single volume) 6.5%, college textbook/professional/exam prep 4.0%, magazine/comic 2.4%, workbook 1.8%, other 2.3%	
		·Sales by release date	New release 63.5%, old release 36.5%	
		·Sales by region	Gyeongsang Province 27.4%, Jeolla Province 22.2%, Incheon City/Gyeonggi Province 16.0%, Seoul 13.5%, Chungcheong Province 13.4%, Gwangwon Province 4.4%, Jeju 3.0%	
	Operational Profit	·Average operational profit: KRW 2,716,200,000		
		·Operational profit margin: 17.9%		
	Net profit	·Average net profit: KRW 159,600,000		
		·Net profit margin: 9.0%		
	Rate of change	·Changes in operational profit: increased 2.3%, similar 53.1%, decreased 44.6%		
		·Changes in net profit:: increased 4.0%, similar 50.0%, decreased 46.0%		
Annual spending breakdown	·Publication purchase 66.0%, personnel 14.8%, other (public charge and tax, etc.) 6.5%, rent 6.1%, purchase (other than publication) 5.8%, advertisement/PR 0.8%			
Goods (book) Status	Breakdown of supplied books by type	·Study-aid 42.7%, general book 29.8%, children's book (collection, single volume) 10.3%, college textbook/professional/exam prep 6.9%, magazine 3.6%, comic 1.9%, other 4.8%		
	New release status	·No. of newly released books put into warehouse: 6,612.9		
		·Average No. of copies per book: 1,365.1		
	Warehouse turnover (book)	·Inbound: 30,288.6 books	·Outbound: 20,325.6 books	·Returned: 4,978.4 books
	Warehouse turnover (copy)	·Inbound: 264,191.3 copies	·Outbound: 263,491.1 copies	·Returned: 88,926.3 copies

Category	Sub-Category	Survey Result	
Goods (book) Status	Changes in movement	· Inbound	87.3 in 2017 ▶ 84.2 in 2018
		· Outbound	85.4 in 2017 ▶ 82.0 in 2018
		· Outbound goods price	84.8 in 2017 ▶ 80.4 in 2018
		· Returned	78.7 in 2017 ▶ 77.5 in 2018
Business Status	No. of business partners	· 78.5 publishers; 27.2 bookstores; 20.4 supply recipients; 5.9 wholesalers; 4.1 sole distributors; 136.1 in total	
	No. of bookstores in business with	· Incheon/Gyeonggi: 13.3; Seoul: 11.2; Jeolla: 10.5; Gyeongsang: 10.2; Chungcheong: 8.7; Gangwon: 2.4; Jeju: 1.3; 57.8 in total	
	Business area	· Local (specific area) 71.3%, national 14.0%, regional 14.0%, other 0.6%	
	Book order method from partners	· Publisher orders	Computer program 72.9%, FAX 15.7%, phone 4.2%, email 4.1%, specialized agency 2.5%, other 0.6%
		· Bookstore orders	Computer program 73.5%, FAX 12.2%, phone 5.0%, email 4.8%, specialized agency 3.1%, other 1.3%
	Purchase channel by type	· General	Publisher 65.2%, other 34.8%
		· College textbook/ professional/exam prep	Publisher 67.3%, other 32.7%
		· Study-aid/workbook	Publisher 75.5%, other 24.5%
		· Children's book	Publisher 55.2%, other 44.8%
	Business condition by type	· From publishers	Children's book 68.5%, general 67.7%, college textbook/professional/exam prep 66.2%, study-aid/workbook 66.2%
		· To bookstores	College textbook/professional/exam prep 75.3%, general 72.0%, study-aid/workbook 71.7%, children's book 70.6%
	Return rate & period by type	· Average return rate (against No. of copies)	Study-aid/workbook 30.5%, college textbook/professional/exam prep 28.0%, general 24.8%, children's book 20.7%
		· Return period by type	Children's book 7.5 months, general 6.8 months, college textbook/professional/exam prep 6.5 months, study-aid/workbook 6.2 months
	Necessary statistics	· Distribution/logistics (transaction/logistics status etc.) 48.9%, consumption (book purchasing behavior, etc.) 34.8%, production (details about released books, etc.) 13.5%, usage (book checkout status at libraries, etc.) 2.8%	

• Offline Bookstore

Category	Sub-Category	Survey Result	
General Status	Bookstore type	·Comprehensive (a variety of book types/fields) 56.8%, mainly study-aid for primary/secondary education 25.3%, religious 7.1%, mainly college textbook/ exam prep 4.6%, specific field 2.7%, product other than books 1.3%, curation/ theme (select shop) 1.2%, children's book 1.0%	
	Company type	·Private 92.7%, incorporated 7.3%	
	Position	·Near school 44.6%, commercial area 22.0%, residential area 18.9%, learning institute district 6.3%, other (incl. public office) 4.1%, no specific geographical feature 4.1%	
	Operation period	·5 years or less 10.7%, 6 – 10 years 14.9%, 11 – 15 years 12.7%, 16 – 20 years 20.4%, 21 years or more 41.2%/ on average, 20.4 years	
	Geographical distribution	·Seoul 146, Gyeonggi 141, Busan 78, Daegu 58, South Gyeongsang 50, North Gyeongsang 49, South Jeolla 45, North Jeolla 42, Daejeon 38, Incheon 32, South Chungcheong 32, Gwangju 30, Ulsan 29, Gangwon 24, North Chungcheong 23, Jeju 10	
	In-store structure	·Size 91.2 pyeong, For books sales 80.4% (book display shelves) 35.2%, For product sales other than books 16.3%, (space to sit and read or relax) 8.4%	
	No. of employees	·Changes in number	Increased 2.2%, similar 84.5%, decreased 13.3%
		·No. of unpaid personnel & part-timer	Unpaid: 1.3, part-timer: 1.6
		·Personnel hired	131 in total (new 82 + experienced 49); 55 men (new 34 + experienced 21) / 76 women (new 48 + experienced 28)
Management Status	Sales	·By product	Book 83.4%, stationery 8.5%, magazine 4.2%, other 3.8%
		·Changes in sales	Increased 5.2%, similar 36.0%, decreased 58.8%
		·By type	Study-aid for primary/secondary education 49.8%, general 30.7%, children's book 8.0%, college textbook 7.0%, other 4.5%
		·By release date	New release 68.1%, old release 31.9%
		·Best seller list compilation & sales	1) Best seller list: compiled by bookstore itself 19.1%, doesn't keep a list 80.9% 2) Sales: TOP 10 31.0%, TOP 100 38.0%
		·By buyer	Individual (general consumer) 83.7%, institution/organization 16.3%
	Operational profit	·Operational profit: KRW 163,300,000	
		·Operational profit margin: 12.1%	
	Net profit	·Net profit: KRW 74,700,000	
·Net profit margin: 8.4%			

2019 Publication Industry Status Survey

Category	Sub-Category	Survey Result	
Management Status	Changes in operational/net profits	·Increased 3.9%, similar 46.0%, decreased 50.1%	
	Annual spending breakdown	·Publication purchase 65.3%, personnel expenses 14.6%, rent 8.1%, purchase (other than publication) 5.3%, ad/PR 0.8%, other 5.9%	
	Changes in personnel expenses & rent	·Increased 18.0%, similar 78.1%, decreased 3.9%	
Product (book) Status	No. of books & copies	·No. of books in stock	Total: 27,691.5; general book 17,155.6
		·No. of copies in stock	Total: 74,849.0; general book 55,231.0
	Breakdown by type	·Study-aid for primary/secondary education 45.9%, general 29.1%, children's book 9.2%, college textbook/exam prep 7.7%, magazine 2.5%	
	New release status	·No. of new release: 5,040.7	
		·Average No. of copies per book: 12.0	
	Monthly orders & returns	·Monthly order: 14,438.8 copies	
·Monthly return: 2,085.6 copies			
Client Status	No. of visitors & purchasing rate	·No. of visitors: 376.8 during weekdays, 532.8 during weekends/holidays	
		·Book purchasing rate of visitors: 68.0%	
	Customer base	·Sex: female 59.0%, male 41.0%	
		·Age: teenager 40.7%, 20s 16.5%, 30s 13.7%, 40s 14.5%, 50s 9.8%, 60s or older 4.9%	
	Main customer	·Teenager (middle/high school) 60.5%, adult 24.1%, youth (college, job-seeker) 8.0%, children (toddler, children, elementary school) 7.4%	
	No. of purchased books & book purchase price	·Average No. of books per purchase: 1.9	
·Average price per purchase: KRW 21,403.6			
Business & Informatization Status	No. of business partners	·Purchased from: 77.1 entities (59.3 direct transaction publishers + 10.9 sole distributors + 6.8 wholesalers)	
		·Sold to: 24.0 entities (7.9 schools + 4.0 libraries + 12.1 others)	
	Purchase rate by type	·General	Wholesaler 65.9%, sole distributor 65.6%, direct transaction publisher 63.5%
		·College textbook/exam prep	Wholesaler 69.7%, sole distributor 71.6%, direct transaction publisher 68.2%
		·Study-aid for primary/secondary education	Wholesaler 71.6%, sole distributor 70.4%, direct transaction publisher 62.0%
		·Children's book	Wholesaler 61.1%, sole distributor 61.2%, direct transaction publisher 60.5%
	Return status by type	·Return rate: Study-aid for primary/secondary education 30.7%, college textbook/exam preparation 31.2%, general 34.2%, children's book 28.2%	
		·Return period: Study-aid for primary/secondary education 7.8 months, general 7.3 months, college textbook/exam prep 7.7 months, children's book 10.5 months	

Category	Sub-Category	Survey Result			
Business & Informatization Status	Level of informatization	·Can manage inventory 84.2%, can search book info 82.0%, can perform purchasing business 74.0%, can manage reader membership 61.0%, can analyze sales trend 47.0%, can make automatic orders 35.5%			
	Level of discount	·Total discount benefits 8.6%, direct discount 8.3%, indirect discount 5.2%			
	Tasks for bookstore promotion	·Fixed book price system 57.9%, book supply rate 16.7%, book purchase from local bookstore (library) 13.4%, social awareness of bookstores (store, certification, campaign, etc.) 5.5%, informatization of publication distribution 2.1%, publication logistics 1.6%, expert training/education 0.3%, other 2.6%			
	Bill transaction	·Bill transaction: yes 10.3%, no 89.7%			
		·Ratio to yearly payment: 33.3%			
		·Maximum of 7.8 months, minimum of 2.6 months = 2.9 months on average			
	Bill type	·Bank bill 78.9%, electronic bill 19.3%, private promissory note 1.8%			
	Current PR/marketing method	Reading space 17.5%, reader/member mileage 15.8%, online exposure 4.8%, hot release/best seller 4.7%, flat rate pricing/membership 3.4%, book café 2.5%, flyer ad 2.5%, delivery service 2.3%, coordination with local society 2.2%, book list 1.9%, self-produced PR materials 1.8%,	curation space inside the store 1.7%, text message/email 1.5%, space for cultural activity/rent 1.2%, POP ad of bookstore-recommended books 0.8%, book club 0.6%, author's lecture 0.4%, video (BookTube) 0.1%, other 0.8%, no specific activity 33.3%		
	Most effective PR/marketing	Online exposure 20.2%, book café 13.0%, reading space 12.8%, coordination with local society 11.4%, reader/member mileage 10.0%, hot release/best seller 4.0%, curation space inside the store 3.6%, space for cultural activity/rent 3.4%, delivery service 3.4%, flyer ad 3.2%, book club 2.6%,	text message/email 2.4%, flat rate pricing/membership 2.2%, book list 1.6%, self-produced PR materials 1.6%, POP ad of bookstore-recommended books 1.2%, author's lecture 1.2%, video (BookTube) 0.6%, other 1.4%, no specific activity 0.2%		
Awareness of Changes in Environment	Life & culture space	Current usage		Future usage (potential)	
		High 19.7%, normal 44.6%, low 35.8%	2.8 points	High 22.5%, normal 47.7%, low 29.8%	2.9 points

Category	Sub-Category	Survey Result		
Awareness of Changes in Environment	Competitive environment	Category	Effects on bookstore management	
		Large bookstore	No 7.1%, neutral 17.0%, yes 75.9%	4.1 points
		Online bookstore	No 1.9%, neutral 3.9%, yes 94.3%	4.8 points
		Offline small to mid-sized bookstore	No 22.4%, neutral 46.5%, yes 31.2%	3.1 points
		Second-hand bookstore (company type)	No 28.4%, neutral 30.9%, yes 40.7%	3.2 points
		Specialized bookstore	No 45.3%, neutral 38.4%, yes 16.4%	2.6 points
	Additional revenue	· Stationery, CD/DVD sales 32.0%, printing/copying/book-binding/laminating 3.1%, space rental/usage (for lecture, event) 2.1%, food/drink sales 1.9%, used book sales 1.6%, merchandise (incl. badge, sticker) sales 1.2%, digital product & accessory 0.1%, other products 2.1%, none 55.9%		
	Necessary statistics	· Consumption (book purchasing behavior, etc.) 52.9%, distribution/logistics (transaction/logistics status etc.) 31.0%, production (details about released books, etc.) 14.0%, usage (book checkout status at libraries, etc.) 2.1%		

• Online Bookstore

Category	Sub-Category	Survey Result	
General Status	Bookstore type	· Subtotal of specialized bookstores 74.9% (other) specialized 53.8%, mainly college textbook/professional/exam prep 11.5%, children's book 5.8%, mainly study-aid for primary/secondary education 1.9%, religious 1.9%, comprehensive (a variety of book types/fields) 23.1%, mainly products other than books 1.9%	
	Company type	· Private 57.7%, incorporated 42.3%	
	Operation period	· 18.7 years	
	Online & offline	· Both offline and online 63.5%, online only 36.5%	
	E-book sales	· No (paper book only) 86.5%, yes 13.5%	
	Used book sales	· Not possible 80.8%, possible 19.2%	
	No. of employees	· Change in number	Increased 3.8%, similar 82.7%, decreased 13.5%
Management Status	Sales	· Logistics personnel	11.7
		· Book sales percentage	Book 84.0%, magazine 5.0%, other 11.0%
		· Changes in sales	Increased 10.7%, similar 17.9%, decreased 71.4%
		· By type	General 51.5%, college textbook/professional/exam prep 27.7%, children's book 14.0%, study-aid for primary/secondary education 4.4%, specific field 2.3%
		· By release date	New release 43.9%, old release 56.1%
		· Used book sales	46.5%
		· Best seller list & sales	Compiled by bookstore itself 19.2%, doesn't keep a list 80.8% Best seller sales: TOP 10 books account for 20.5% of all sales, TOP 100 books, 39.7%
		· By buyer	Individual (general consumer) 88.4%, institution/organization 11.6%
		· By region	Capital area 58.1%, outside the capital area 41.9%
	Operational profit	· Operational profit: KRW 2,166,400,000	
		· Operational profit margin (against sales): 13.0%	
	Net profit	· Net profit: KRW 1,548,500,000	
		· Net profit margin (against sales): 10.6%	
	Changes in operational/net profits	· Operational profit: similar 27.8%, decreased 72.2%	
		· Net profit: similar 35.0%, decreased 65.0%	
	Annual spending breakdown	· Total spending: KRW 5,845,100,000	
		· Item: publication purchase 66.0%, personnel expenses 12.5%, rent 11.8%, purchase (other than publication) 4.4%, ad/PR 1.5%, other 4.0%	

Category	Sub-Category	Survey Result
Product (book) Status	No. of books in DB	·No. of books available for search: 445,976.1 / No. of Korean books among them: 359,422.6
		·No. of books on sale: 283,922.2 / No. of Korean books among them: 69,794.2
	Storage status	·Warehouse size 4,910.8㎡ (1,488.1 pyeong), capacity: 650,000 copies, utilization: 71.2%
	No. of books & copies	·No. of books in stock: 78,267.8; general: 60,185.8
		·No. of copies in stock: 1,699,601.7; general: 740,535.9
	By type	·General 40.7%, college textbook/professional/exam prep 23.5%, specific field 16.2%, children's book (collection, single volume) 10.2%, study-aid for primary/secondary education 4.9%, magazine 4.5%
	New release status	·No. of newly released books in stock for 2018: 9,233.6
		·Average No. of copies per book: 18.9 copies
	Warehouse turnover	·Warehouse turnover (book): inbound 153,280.4; outbound 185,995.7; returned 16,678.3
		·Warehouse turnover (copy): inbound 2,669,110.7; outbound 2,503,773.6, returned 245,922.8
Client Status	Daily average No. of visitors	·Inbound (2016 figure: 100): 90.6 in 2017 ► 90.6 in 2018
		·Outbound (2016 figure: 100): 87.6 in 2017 ► 85.3 in 2018
	Customer base	·Outbound goods price (2016 figure: 100): 88.9 in 2017 ► 85.9 in 2018
		·Returned (2016 figure: 100): 87.5 in 2017 ► 97.0 in 2018
	No. of books purchased & book purchase price	·Daily average No. of visitors to website: 11,196.6; daily average No. of visitors on mobile: 21,300.3
		·Purchasing rate on website 26.0%; purchasing rate on mobile 30.3%
	Changes in visitor/buyer	·Sex: female 55.1%, male 44.9%
		·Age: teenager 9.5%, 20s 26.7%, 30s 32.1%, 40s 20.1%, 50s 9.6%, 60s or older 2.1%
	Changes in customer service	·Average No. of books per order: 2.1
		·Average price per purchase: KRW 28,388.2
	Changes in No. of events & prizes/ merchandises	·No. of visitors (2016 figure: 100): 96.7 in 2017 ► 99.4 in 2018
		·No. of buyers (2016 figure: 100): 95.6 in 2017 ► 97.6 in 2018
	Changes in customer transaction & sales	·Reader content (2016 figure: 100): 97.9 in 2017 ► 97.1 in 2018
		·Bookstore content (2016 figure: 100): 100.5 in 2017 ► 100.3 in 2018
		·No. of events (2016 figure: 100): 99.9 in 2017 ► 100.2 in 2018
		·No. of prizes/merchandises (2016 figure: 100): 100.7 in 2017 ► 100.7 in 2018
		·Customer transaction (2016 figure: 100): 94.7 in 2017 ► 95.4 in 2018
		·Sales (2016 figure: 100): 95.2 in 2017 ► 96.9 in 2018

Category	Sub-Category	Survey Result		
Business Status	No. of business partners	· Average No. of suppliers: a total of 932.4 entities (34.2 wholesalers + 39.9 sole distributors + 858.2 direct transaction publishers)		
		· Average No. of buyers: a total of 248.5 entities (26.3 schools + 15.2 libraries + 12.3 offline bookstores + 194.7 others)		
	Affiliate business status & sales	· No. of affiliate business: 24.2		
		· Sales from affiliate business: 46.1%		
	Email service	· No. of members as of end-2018: 2,593,724.9		
		· Percentage of members in 2018: 30.4%		
	Purchase rate by type	· General book: direct transaction publisher 70.4%, other 74.7%		
		· College textbook/professional/exam prep: direct transaction publisher 71.6%, other 75.6%		
		· Study-aid for primary/secondary education: direct transaction publisher 70.9%, other 76.0%		
		· Children's book (collection, single volume): direct transaction publisher 71.7%, other 76.7%		
	Average return rate & period by type	· General 27.2%, children's book 16.4%, study-aid for primary/secondary education 6.5%, college textbook/professional/exam prep 6.3%		
		· Study-aid for primary/secondary education 6.4 months, college textbook/professional/exam prep 6.1 months, children's book 3.1 months, general book 2.6 months		
	Level of discount	· Total discount benefits 10.4%, direct discount 10.3%, indirect discount 4.6%		
Awareness of Changes in Environment	Competitive environment	Category	Effects on bookstore management	
		Large bookstore	No 27.3%, neutral 13.6%, yes 59.1%	3.5 points
		Online bookstore	No 20.5%, neutral 18.2%, yes 61.4%	3.7 points
		Offline small to mid-sized bookstore	No 45.2%, neutral 40.5%, yes 14.3%	2.5 points
		Second-hand bookstore (company type)	No 47.6%, neutral 23.8%, yes 28.6%	2.7 points
		Specialized bookstore	No 39.0%, neutral 31.7%, yes 29.3%	2.8 points
	Necessary statistics	· Consumption (book purchasing behavior, etc.) 65.4%, distribution/logistics (transaction/logistics status etc.) 23.1%, production (details about released books etc.) 9.6%, usage (book checkout status at libraries, etc.) 1.9%		

• E-Book Distributor

Category	Sub-Category	Survey Result	
General Status	Main field	·General (except for genre fiction) 73.3%, genre fiction (romance, fantasy, martial art, sci-fi, etc.) 53.3%, comic/webtoon/graphic novel 40.0%, magazine 13.3%	
	Main format	·Text e-book 93.3%, multimedia e-book 40.0%, serialized content 33.3%, audio book 20.0%, other 6.7%	
	Extent of e-publication business	·Production/publication	E-publication of paper book 84.6%, webnovel 53.8%, multimedia e-book 38.5%, audio book 23.1%, e-magazine 15.4%, app 15.4%, database (knowledge/academic information) 7.7%
		·Distribution	E-publication of paper book 78.6%, webnovel 50.0%, multimedia e-book 42.9%, e-magazine 28.6%, database (knowledge/academic information) 21.4%, app 14.3%, audio book 14.3%
	No. of employees	·Changes in number	Increased 20.0%, similar 73.3%, decreased 6.7%
		·Personnel hired	4.2
		·No. of authors on contract	Non-exclusive: 42,987.5 Exclusive: 550.8
Management Status	Sales	·Changes in sales	Increased 33.3%, similar 33.3%, decreased 33.3%
		·Sales by type	General (except for genre fiction) 42.6%, other serialized webnovel (romance, etc.) 16.3%, webnovel (serialized) 16.0%, comic/webtoon/graphic novel 10.6%, other (magazine, etc.) 14.5%
		·Production by format	Text e-book 88.2%, multimedia e-book 3.0%, audio book 0.1%, other 8.6%
		·Sales by format	Text e-book 88.3%, multimedia e-book 2.7%, audio book 0.2%, other 8.7%
		·Sales by distribution channel/business type	B2C subtotal: 70.5% (one volume edition (single copy) sales 49.4% + series (set) sales 3.4%, flat rate pricing (rental/content voucher) 17.7%), B2B (sales to institution/organization) 17.0%, B2BC (websites linked, profit distributed afterward) 12.5%
		·Marketing to sales percentage	9.4%
		·Average monthly royalties to author	Personnel: 2,114.6
			Price: KRW 389,125,000
		·Best seller sales	Annual TOP 10 e-book sales to overall e-book sales: 12.7% Annual TOP 100 e-book sales to overall e-book sales: 23.3%

Category	Sub-Category	Survey Result	
Sales Status	No. of business partners	·Content suppliers: 1,094.4 publishers, 24.2 professional content providers/agencies, 828.6 authors ·Buyers: B2B with 511.3, B2BC with 12.0, other 31.0	
	Service status	·Single volume/series	Service status: 255,850.8 e-books (other than webnovels), 188,333.3 webnovels Sales status: e-book (other than webnovels) 86.9%, webnovel 22.5%
		·Flat rate pricing	Registered No. of cases: 506.3 Usage rate: 55.0%
	Current sales marketing	·Ordinary sales (download single volume) 83.3%, borrow for fixed period (90 days maximum) 41.7%, subscribe at flat rate (unlimited use) 33.3%, other ('wait for free' etc.) 16.7%	
	Future marketing considerations	·Ordinary sales (download single volume) 50.0%, subscribe at flat rate (unlimited use) 37.5%, borrow for fixed period (90 days maximum) 37.5%, other ('wait for free' etc.) 25.0%	
Client Status	No. of members/visitors	·Accumulated No. of members as of end-2018: 583,629.8; No. of members who bought single volume/series (at least once): 136,571.4, No. of members who paid a flat fee (rental/content voucher): 9,285.7, daily average of 31,021.5	
	Customer base	·Sex: male 43.4%, female 56.6% ·Age: teenager 2.2%, 20s 25.9%, 30s 33.1%, 40s 27.1%, 50s 10.4%, 60s 1.3%	
Awareness of Changes in Environment	E-book price against paper book price	·Current e-book price against paper book price: 68.9% ·Ideal e-book price against paper book price: 68.2%	
	E-publication market outlook	·2019 outlook	Growth potential of e-publication industry 121.7 (genre fiction 128.2, general 110.0, text e-book 112.7, multimedia e-book 106.5, audio book 112.5, webnovel 138.0), company's growth potential 115.5
		·2020 outlook	Growth potential of e-publication industry 147.0 (genre fiction 142.4, general 116.7, text e-book 121.2, multimedia e-book 104.7, audio book 111.3, webnovel 156.7), company's growth potential 127.5
	Effective method for e-book sales increase	·Preview (free content) 33.3%, subscription model (flat rate) 20.0%, mileage benefit 13.3%, content curation 13.3%, exposure on main web page 13.3%, mobile-friendly content 6.7%	
	Critical tasks to promote e-publication market	·Acquire abundant content 46.7%, improve content quality 26.7%, develop easy-to-use interface 6.7%, partnership effort (to reduce cost, etc.) 6.7%, achieve price competitiveness (appropriate price) 6.7%, ensure easy discovery of content (thru PR, etc.) 6.7%	

Category	Sub-Category	Survey Result				
Diversified E-Publication	Necessity & potential of functions	Category	Necessity		Market potential	
		Audio/video	Yes 71.4%, neutral 28.6%, no 0.0%	3.9 points	High 50.0%, average 42.9%, low 7.1%	3.5 points
		App/e-pub 3.0 (multimedia)	Yes 71.4%, neutral 21.4%, no 7.1%	3.9 points	High 50.0%, average 42.9%, low 7.1%	3.6 points
		Audio book	Yes 64.3%, neutral 28.6%, no 7.1%	3.9 points	High 57.1%, average 42.9%, low 0.0%	3.9 points
		Webnovel	Yes 71.4%, neutral 28.6%, no 0.0%	4.1 points	High 78.6%, average 14.3%, low 7.1%	4.1 points
		AR & VR	Yes 42.9%, neutral 35.7%, no 21.4%	3.4 points	High 21.4%, average 64.3%, low 14.3%	3.1 points

• Book Copyright Export Statistics

Category	Sub-Category	Survey Result																
Survey Overview	Purpose & necessity	·Book copyright export statistics aims to identify copyright-related exports out of all exports by publishers and copyright agency brokerage businesses and use the findings as the basis for establishing an export database in the future. ·Previous data covered 2016 and 2017; survey on 2018 performance required.																
	Procedure	·Obtained a list of 1,414 agencies registered with the Ministry of Culture, Sports and Tourism ·Conducted an investigation into book copyright trading records, confirmed agencies with export records ·Received/Analyzed the 2018 publication copyright data of 15 agencies that had engaged in book copyright trading																
Result based on No. of Export	No. of cases & percentage by classification (2016~2018)	Cat.	Genera-lities	Philos-ophy	Religion	Social Science	Natural Science	Science & Tech	Art	Language	Culture	History	Learning	Children	Comic	Total		
		2016	2	22	2	56	9	183	65	79	189	22	6	887	162	1,684		
		2017	68	3	0	64	11	8	21	155	171	9	0	565	210	1,285		
		2018	43	11	0	69	16	46	52	125	306	50	38	734	224	1,714		
		#	113	36	2	189	36	237	138	359	666	81	44	2,186	596	4,683		
		%	2.4	0.8	0.0	4.0	0.8	5.1	2.9	7.7	14.2	1.7	0.9	46.7	12.7	100.0		
	No. of cases & percentage by region (2016~2018)	Category		Asia		Europe		North America		South America		Middle East		Africa		Oceania		Total
		2016		1,515		108		18		30		11		1		1		1,684
		2017		1,169		81		22		12		1		0		0		1,285
		2018		1,504		139		21		11		37		1		1		1,714
		#		4,188		328		61		53		49		2		2		4,683
		%		89.4		7.0		1.3		1.1		1.0		0.0		0.0		100.0
	No. of export to major countries (2018)	China		Taiwan		Thailand		Indonesia		Vietnam		Hong Kong						
		480		272		231		191		167		96						
		France		Japan		Turkey		Malaysia		Mexico		U.S.						
		79		41		37		21		12		9						
Accumulated No. of export to major countries (2016~2018)	China		Taiwan		Indonesia		Thailand		Vietnam		France							
	1,502		1,006		515		464		388		118							
	Hong Kong		Malaysia		Japan		Turkey		U.S.		Italy							
	110		95		88		74		42		31							

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Category	Sub-Category	Survey Result						
Result based on Advance Payment under Contract	Amount of advance payment & percentage by region (2018)							
		Category	Asia	Europe	North America	Middle East	South America	Total
		\$	2,943,281	597,600	34,480	26,700	11,204	3,613,265
		%	81.5	16.5	1.0	0.7	0.3	100.0
	Amount of accumulated advance payment & percentage by region (2016~2018)							
		Category	Asia	Europe	North America	Middle East	South America	Total
		\$	11,528,386	1,342,258	265,505	100,341	29,704	13,266,194
		%	86.9	10.1	2.0	0.8	0.2	100.0
	Amount of advance payment by major country (2018)	China		Taiwan	France	Thailand	Indonesia	Japan
		1,483,955		597,484	301,642	285,104	183,332	122,520
		Vietnam		Italy	Hong Kong	Germany	Malaysia	U.K.
		121,969		105,862	93,717	59,050	50,000	38,832
	Amount of accumulated advance payment by major country (2016~2018)	China		Taiwan	Japan	Thailand	Indonesia	France
5,865,166		2,665,229	979,157	812,630	544,283	524,604		
Vietnam		U.S.	Italy	Malaysia	Germany	Hong Kong		
317,105		299,098	222,955	210,171	142,624	99,273		