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**Nielsen
BookData**

EXECUTIVE SUMMARY



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Nielsen BookData and the International Publishers Association (IPA) collaborated at the beginning of 2023 to navigate the evolving landscape of publishing within the IPA member countries. The publishing landscape continues to undergo profound transformations, impacting publishers, content creators and consumers alike, and a data-driven approach is required to address the rapidly changing dynamics.

The Nielsen BookData and IPA Report is a collaborative project providing valuable insights into the global publishing industry. The collected data cover industry structures, demographics, digital inclusion, school and higher education enrolments, and public policy. The data will inform the work of publishing professionals and policy-makers and enable comparisons to be drawn between countries and regions of the world.

The study will enable publishing houses to assess market prospects in different regions and countries. For example, school and children's publishers can see the age distribution of the national populations, alongside data on the number of schools and enrolled students, and how the schools are operated, whether state or privately run. Publishers can tailor their content to meet the educational needs of each country according to the domestic infrastructure. There is information about imports and exports by country, revealing the leading sources of book imports and top countries for export. Analysis of import and export data identifies receptive target markets and helps publishers to refine their international distribution strategies. This is further aided by the data in the report on prominent book publishers and retailers for each country. Levels of digital connectivity will inform decisions about print and digital publishing, and data on the penetration of social media are highly relevant to marketing campaigns. Academics studying the industry can draw on the rich data in the report when developing research programmes into the key drivers influencing reading habits and book consumption.

Books remain an important part of the knowledge economy as reflected by the supportive policy regimes in many countries. Policy-makers and trade bodies will find the data valuable, for example, for comparing tax regimes across countries and regions. Information in the study on fixed book pricing and equivalent policies should inform the debate in this area. Sharing information about the regulatory frameworks for publishing in each country will help publishers navigate legal requirements and protect intellectual property rights.

The report is divided by region using the United Nations (UN) definitions. Countries are grouped geographically into six major areas: Africa, Asia, Europe, Latin America and the Caribbean, North America, and Oceania. There are summaries for each region and in-depth data across the 76 IPA member countries.

Table: Summary of Regions

Region	Number of countries in research	Population (m)
Africa	15	729
Asia	23	4212
Europe	23	624
Latin America and the Caribbean	11	549
North America	2	372
Oceania	2	31
Total	76	6517

The population within the 76 member countries totals around 80% of the world's population. The survey included the two most populous nations in the world, India and China, each with a population of 1.4 billion, alongside smaller nations such as Armenia, Mauritania and Slovenia. There is coverage of all the major international book markets such as the United States of America, China, Japan, India, Germany and the United Kingdom.

1. Publishing Industry

The survey gathered data on the number of books registered in 2022 in each country. Overall, the country issuing the highest number of ISBNs was the United States, with over 3 m ISBNs registered. The table below highlights leading countries for ISBNs issued by region.

Table: ISBNs registered by region and its respective countries

Region	Country	ISBNs Registered	Number of Publishers
Africa	Nigeria	14,392	290
	Tunisia	3,143	356
	Ghana	2,000	100
Asia	Japan	902,311	1,785
	Republic of Korea	338,237	75,324
	India	281,091	24,538
Europe	Germany	277,000	68,611
	United Kingdom	153,167	10,969
	Italy	138,970	5,999
Latin America and the Caribbean	Brazil	179,042	820
	Argentina	35,500	6,980
	Mexico	27,534	227
North America	United States	3,279,217	2,252
	Canada	21,105	1,690
Oceania	Australia	31,708	200

A comparative measure between national industries is new title production per capita of the population. Some countries with smaller populations, such as Iceland, Singapore and Slovenia, score highly by this measure. For the regions of Africa, Asia, Europe, Latin American and the Caribbean, the following are the countries with the highest ratio by this measure:

Africa: Tunisia, Nigeria, Ghana

Asia: Japan, Republic of Korea, Singapore

Europe: Slovenia, Iceland, Netherland

Latin America and the Caribbean: Brazil, Argentina, Chile

Fixed Book Price Regimes

The data are incomplete in this area but there is evidence of Fixed Book Price regimes or an equivalent policy in four of the regions: Africa, Asia, Europe, Latin American and the Caribbean.

2. School Education

Data were collected by country on both the number of schools and school enrollments. The data set is incomplete and secondary research was carried out where possible. There is also data on how schools are run – whether by the government or privately. The data on school enrollments as a percentage of the total population reveals the young population in Africa. The UN estimates that 70% of sub-Saharan Africa is under the age of 30. The school population in Africa is 20% of the total population, compared to a figure of 14% in Europe. The table below gives the percentages for each region.

Table: School Enrollments as percentage of total population by region

Region	School population as % of total population
Africa	20
Asia	16
Europe	14
Latin America and the Caribbean	15
Northern America	16
Oceania	16

Figures on school enrollments for the region of Africa are incomplete, but of the countries with data returned, the highest school populations are in Nigeria, Egypt and Kenya. Nigeria has the highest number of schools in the region, with more than 144,000 in number: 50% are managed by the government and 50% run privately. Kenya reported 31,000 schools, with the government running 77% schools, and 23% privately run. In South Africa, there are approximately 25,000 schools - 91% of the schools are run by the government.

The countries with the highest proportion of their total population in school education are Kenya, Côte d'Ivoire, Libya, South Africa and Morocco. This reflects a younger demographic in the national populations.

Figures on school enrollments for Asia are incomplete, but the countries with the highest school populations are India, Indonesia, the Philippines, Pakistan, and Japan. India has the highest number of schools in the Asia region, with 1.4 m - 77% of schools are managed by the government and 23% are run privately. Indonesia is ranked second followed by Pakistan. Indonesia reported around 400,000 schools in operation, with the government running 63% of them and 37% run privately. Pakistan has over 140,000 schools: 87% of the schools are run by the government, with the other 13% privately operated.

The countries with the highest proportion of their population in school education are Israel, Philippines, Nepal, Lebanon and Sri Lanka. This reflects the younger demographic in the national populations.

In Europe, Russian Federation had 44,000 schools; followed by the United Kingdom, which has more than 32,000 schools. According to the secondary research by Nielsen BookData, France has 57,000 schools operating in the country.

The countries with the highest proportion of their total population in school education are Ireland, France, Sweden, Norway and Belgium.

Data on school enrollments are incomplete for the region of Latin America and the Caribbean. According to the data collected from the publishing associations, Mexico has more than 250,000 schools in the country: 85% of schools are managed by the government and 15% are run privately. Second position goes to Brazil with more than 178,000 schools - 77% of schools are managed by the government and 23% are privately owned. Colombia has more than 56,000 schools with 81% managed by the government and 19% privately owned.

The countries with the highest proportion of their total population in school education are Brazil, Guatemala, Panama, Columbia and Chile.

In the region of Northern America, the United States has 130,000 schools and enrollments of 53.9 m students. In Canada, there are 84,000 schools and enrolments of 5.7 m students. Regarding the region of Oceania, Australia has approximately 10,000 schools and enrollments of 4 million. In New Zealand, there are 2,500 schools and enrollments of over 800,000 students.

3. Higher Education

Data were collected by country on both the number of higher education institutions and the number of students enrolled. There is also data on how higher education institutions are run – whether by the government or privately.

The data on enrollments in higher education as a percentage of the total population reveals higher rates in Northern America and Europe. The table below shows the percentage for each region.

Table: Higher Education Enrollments as a percentage of total population by region

Region	Higher Education enrollment as % of total population
Africa	1
Asia	3
Europe	4
Latin America and the Caribbean	3
Northern America	6
Oceania	5

Data are only available for six of the IPA member countries in the Africa region. Kenya has the highest number of higher education institutions. There are 2,550 higher education institutions, and 94% are government run, and 6% are privately owned. Côte d'Ivoire ranks second on the list with 614 higher education institutions: 98% are privately held, with the government controlling the other 2%. Nigeria has 492 higher education institutions, with 50% run by each of the government and the private sector.

The countries with the highest percentage of their population in higher education are South Africa, Egypt and Kenya. The five countries in Asia with the largest number of students in higher education are India, Indonesia, Philippines, Republic of Korea, and Japan. No figure was recorded for China, but the number is estimated to be around 45 m students.

India has the highest number of higher education institutions (over 55,000). Indonesia ranks second with 4,004 higher education institutions – provision is largely offered by the private sector, and 96% of higher education institutions are privately run. Pakistan has 3,223 higher education institutions, with 55% of these public institutions.

The countries with the highest percentage of the population in higher education are Republic of Korea, Singapore, Lebanon, Israel and Philippines.

In Europe, the Russian Federation reported 1,247 higher education institutions operating in the country; and the United Kingdom 590. Secondary data suggested that there are 75 universities in Spain and 71 universities in France. The countries with the highest proportion of their population in higher education are Greece, Netherlands and Norway.

Regarding higher education in the region of Latin America and the Caribbean, Mexico reported 8,539 higher education institutions in the country. Of these 65% are privately held, with the government controlling the other 35%. Guatemala has 5,006 higher education institutions: 81% are privately held, with the government controlling the other 19%. Next is Brazil with 2,574 higher education institutions, with 88% operated by private players. The countries with the highest percentage of the population in higher education are Peru, Brazil and Columbia.

In the region of Northern America, the United States has nearly 6,000 higher education institutions with an enrollment of 21.1 m students. In Canada, student enrollments are around 2.1 m. In Oceania Australia has 200 higher education institutions with an enrolment of 1.5 m students; and New Zealand has 8 universities with around 150,000 students enrolled.

4. Imports and Exports

The survey revealed the top sources of book imports for each country, and the leading export markets. The answers were aggregated to identify the countries that received the most mentions within each region. There is a high frequency observed for large publishing markets such as the United States and the.

Responses to the survey around the importation of books highlighted 17 countries as the origin of book imports in the Africa region. The three countries most frequently mentioned were India, United Kingdom and United States. It is suggested that the frequency of mentions for India could reflect the printing of books there. In terms of book exports, a plurality of countries is to be found: 27 countries were highlighted with Kenya and Tanzania receiving the most mentions.

Responses to the survey in Asia around the importation of books highlighted 14 countries as the origin of book imports. The three countries most frequently mentioned were the United Kingdom, United States and China. In terms of book exports, 20 countries were highlighted with the ones most often mentioned the United States, Saudi Arabia, China and the United Arab Emirates.

Responses to the survey in Europe around the importation of books highlighted 23 countries for the sourcing of books, with the top three, recording the most mentions, the United Kingdom, United States and Germany. In terms of book exports, a large number of countries were mentioned (29): the four countries with the most mentions were Germany, United States, United Kingdom and France.

Responses to the survey in the region of Latin America and the Caribbean around the importation of books highlighted 8 countries for the sourcing of books, with the top three, recording the most mentions, Spain, United States and China. In terms of book exports, 13 countries were mentioned in the responses. The top four, with the most mentions, were United States, El Salvador, Guatemala and Peru.

For Canada, in the region of Northern America, the United States and France are the two main countries for sourcing book imports, and those two countries are also the leading export markets.

In Oceania, key countries for the import of books to Australia are the United States and United Kingdom; these are also important export destinations. For New Zealand, Australia and the United States are the main export markets as well as the main sources of imported books.

5. Digital Inclusion

The research collected data on mobile phone usage, internet access, and social media penetration. The figures for mobile phone usage often exceeded 100% of the population, revealing multi-device connectivity. The highest rate of mobile usage is found in Europe, and the highest rate for internet usage is in Northern America. Data were also collected for social media usage in each country. The greatest variance in social media usage is found in the region of Africa, with high rates in Europe, Northern America and Oceania.

The rates of mobile usage are high across the region of Africa. Figures exceeding 100% can be seen in 7 countries suggesting high rates of multi-device ownership. The lowest figure given is 53% in Mozambique. The proportion of internet users reaches 70% or greater in 5 countries. The rate of social media usage ranges from 6% in Uganda and 9% in Mozambique to 91% in Libya and 93% in South Africa.

The rates of mobile usage are high across Asia with the lowest figure being 69% in Lebanon. Figures exceeding 100% can be seen in 11 countries suggesting high rates of multi-device connections. The proportion of internet users reaches over 90% of the population in 8 of the IPA member countries surveyed. The rate of social media usage ranges from 31% in Pakistan and 68% in China and 33% in India to 91% in Lebanon and over 100% in the UAE.

In Europe, the rates of mobile usage are high across the region with an average mobile subscriber score of 124%, suggesting multi-device usage is common. Internet usage is also high across the region with the lowest scores to be found in Albania and Ukraine (both 72%). Social media usage reaches high levels in Iceland (96%), the Netherlands (91%) and Sweden (91%).

The rates of mobile usage are high across the region of Latin America and the Caribbean with the lowest figure being 77% in Venezuela. Figures exceeding 100% are seen in 8 countries suggesting high rates of multi-device connections. The proportion of internet users is above 50% in all countries with rates of 92% in Chile and 90% in Brazil. The rates of social media usage range from 50% in Jamaica to 93% in Chile.

The rates of usage across mobile, internet and social media are high in the regions of Northern America and Oceania.

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About International Publishers Association (IPA)

The International Publishers Association (IPA) is the world's largest federation of publishers associations with 92 members in 76 countries. Established in 1896, the IPA is an industry body with a human rights mandate. The IPA's mission is to promote and protect publishing and to raise awareness of publishing as a force for economic, cultural and social development. Working in cooperation with the World Intellectual Property Organization (WIPO) and numerous international NGOs, the IPA champions the interests of book and journal publishing at national and supranational level. Internationally, the IPA actively opposes censorship and promotes copyright, freedom to publish (including through the IPA Prix Voltaire), and literacy.

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About Nielsen BookData

Nielsen BookData provides a range of services to the book industry internationally, aiding the discovery and purchase, distribution and sales measurement of books. We are responsible for the ISBN and SAN Agencies in the UK & Ireland as well as providing search and discovery services for booksellers and libraries around the world. Our Research services provide retail sales analysis for print books in 11 countries alongside research from our Books and Consumers Survey and other detailed reports. For publishers we offer a range of services from assigning an ISBN to your book to adding your metadata to our database and promotional tools to help market your book.

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