



Research on the Development and Countermeasures of Children's Picture Book Industry in China

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Abstract. With the development of early childhood education in China and the enhancement of parents' awareness of early childhood education, picture books are increasingly favored by Chinese parents as an "imported product" in early childhood education. This paper attempts to put forward feasible countermeasures for the development of the children's picture book market in China and promote the development of early education of children's picture books by analyzing the development status, problems and picture book consumption demands of the children's picture book market in China.

Keywords: Early childhood education · Children's picture book industry · Development and countermeasures

1 Introduction

As the first book of life, it is called as "picture book" in English. Picture books have fascinating storylines, creative painting performances, and are easy to understand. They can enable children to learn knowledge from them, open children's intelligence, bring children happiness, and stimulate children's imagination [1]. As early childhood education gets more and more attention from Chinese parents, picture books will become the first book in the lives of more and more Chinese children. In the past ten years, China's children's picture book market has developed rapidly. In addition to family purchases, ordering from kindergartens and public libraries, many brick-and-mortar picture book libraries and influential online picture book libraries have emerged in large and medium-sized cities in China. Parents' attention and the increase in the number of picture book libraries have expanded the demand for picture books [2]. While the picture book market in China is developing rapidly, it is faced with problems such as uneven quality of original picture books and insufficient local picture book writers and painters. How to meet the growing needs of parents for early childhood education of picture books while ensuring that children obtain more diversified and scientific picture book education is a question worth thinking about by picture book workers.

2 Development Status of Picture Book Market in China

2.1 Children's Picture Books Have a High Proportion and Rapid Growth: The Market Share is Firmly in the Top Three

In the first three quarters of 2020, the children's book market is still the category with the largest proportion of the fixed price, and the proportion of the fixed price in the overall retail market has reached 28.27%. Among them, the market share of children's picture books is 18.55%, ranking the top three in the category of children's books [3]. Affected by the epidemic, the long-term home prevention and control has increased the time children spend with their parents. As a child's "first book in life", picture books are gradually developing into rigid-demanded and high-frequency objects in parent-child companionship scenes, becoming the standard for home education. At the same time, children's picture books are still in the market cultivation period. At present, the scale of China's picture book market is between 30 billion and 50 billion. Chinese children read less than 10 books per year, while in Europe, America, Japan and other countries, the number is 50–100. It is expected that in the next 5–10 years, the market size of the entire children's picture book will expand by more than 5 times.

2.2 Chinese Parents' Awareness of Picture Book Education is Strengthened, But Picture Books Are Expensive, Difficult to Read, and Quick to Change

In recent years, with the increasing popularity of education for all, parents' recognition of picture book reading education has also increased year by year. 86% of parents are more willing to spend time with their children in learning, and picture book reading is favored by parents as a relaxed learning method. However, unlike adult books, children's picture books are dominated by pictures and supplemented by text. They have high requirements for printing quality and craftsmanship, and are difficult to use in electronic versions, resulting in book prices increasing year by year. In addition, when parents buy books, the people who read them are children, which can easily lead to children who do not like or read books bought by parents. Moreover, as children grow up, the replacement rate of picture books is high, so the threshold for continuous picture book reading is not low.

2.3 The Online Picture Book Platform is Still in Its Infancy, Mainly Providing Picture Book Borrowing and Picture Book Electronic Services

Due to the characteristics of high price, difficult reading and fast replacement of picture books, online picture book reading platforms have appeared in the market, but the industry is still in its early stage, so a stable industry pattern has not yet been formed. There are two main types of online picture book reading platforms: one is to upgrade the picture book borrowing business through network services, and it is still a picture book paper book borrowing business; the other is to digitize and audioize picture books to provide users with online reading services. However, whether it is online picture book borrowing or the platform that digitizes picture books and audio can not fully meet the growing expectations and needs of young parents for picture book education, so these platforms are still in the early stage of scale and development.

3 Problems in the Picture Book Market in China

3.1 Imported Picture Books are More Popular, and the Quality of Original Picture Books in China Varies

In 2020, the proportion of works by foreign authors in the children's book market is basically stable, but the proportion of works by foreign authors in children's picture books is the highest, reaching 61.22% [4]. The imported version of children's picture books occupies a large proportion of the market share, while Chinese children's picture books lack originality. Many picture books draw lessons from, and even copy foreign picture books. The created picture books do not consider the acceptance level of children at all, and the quality of picture books is uneven.

3.2 The Number of Local Children's Picture Book Writers and Children's Picture Book Painters is "Double Insufficient"

In China, there are many people who can write and many children's stories, but not all those who create children's literature have the ability to create picture books. The language of children's picture books is quite different from the presentation of other stories and other children's books, and the number of professional children's picture book writers is insufficient. In addition, children's picture book painters need to have a very good understanding of the characteristics of picture books and master the layout and rhythm of children's picture books, which is very demanding for painters. However, in China, the team and number of professional children's picture book painters are still insufficient [5]. The "double insufficient" of writers and painters has caused "congenital defects" in the production of original picture books in China.

3.3 The Backward View of Children Leads to the Backward View of Picture Book Consumption

Parents, as picture book buyers, lack aesthetics. Many parents do not know what a good picture book is. They only judge whether a picture book is worth buying based on whether the packaging of the picture book is exquisite and the colors are bright. [6] At the same time, parents are too utilitarian to buy picture books. When the parents bought a classic picture book, it can be found out that there are many parents who feel that they have made a loss in buying a few words. The backward view of children has led to the backward view of picture book consumption, and the backward consumer market cannot force creators to create excellent works.

4 Hot Trends in the Picture Book Market in China

4.1 Paying Attention to IP Cooperation, and Carrying Out Comprehensive Development Around Works with High-Quality Children's Content

For example, the picture books can be bound with large-scale IP authors or works, such as the picture book adaptation of Cao Wenxuan's children's novels, and the author

“Zheng Yuanjie” as the original picture book of the IP. For mature IP motifs, the creative team develops and grafts existing IPs, and creates derivative creations based on the characteristics of picture books. It can indeed rely on the gathering of IP users and fans to form a greater influence, thereby forming a good marketing momentum. Therefore, IP picture books can achieve better sales results without excessive marketing investment. Major publishing houses in China have already launched the operation and layout of IP, and IP picture books have become more suitable for large publishing houses with strong financial strength.

4.2 Chinese Traditional Culture Picture Books are Popular But There is Still a Large Space for Its Development

At present, the categories involved in the design of children’s picture books of traditional Chinese culture are mainly designed with elements such as ancient poems, ancient stories, Chinese paintings, and calligraphy. The focus is still on ancient poetry and story adaptation, so there are not many children’s picture books that truly represent the content of traditional Chinese culture, and their forms are not sophisticated, and the gap is large. Even so, Dangdang’s picture book data in October 2019 still shows that in addition to the introduction of picture books, the “Zodiac Fairytale Picture Book” with the content of traditional culture is the most popular among original books in China. This also shows that with the introduction of cultural confidence and the concept of “big language”, more and more Chinese parents have a demand for traditional cultural picture books.

5 Research and Analysis on Consumer Demand for Picture Books

This research takes parents in Xiamen City, Fujian Province as the research object to carry out a questionnaire survey. The questionnaire mainly focuses on parents’ cognition, needs, pain points and expectations of picture books. The distribution of the questionnaires covered the five administrative regions of Xiamen, and nearly 300 questionnaires were recovered, of which 286 were valid.

5.1 Most Parents Attach Great Importance to Their Children’s Reading and Have the Habit of Reading with Their Children

In this survey, more than 90% of the population has the habit of reading with their children. The number of people whose reading frequency is “occasional reading” is the largest, accounting for 47.83% of the total number of people; the number of people who read often accounts for 45.6% of the total number of people, and the number of people who basically do not read is the least, accounting for 7.11% of the total number of people. It can be seen that reading has become one of the important forms in family life (“Fig. 1”).

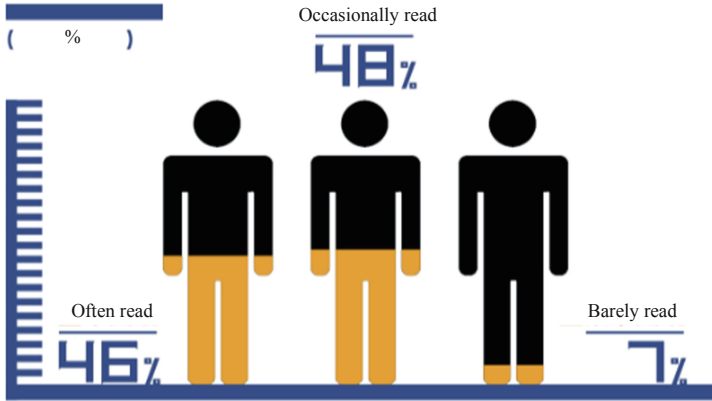


Fig. 1. Analysis of parents' accompany reading habits.

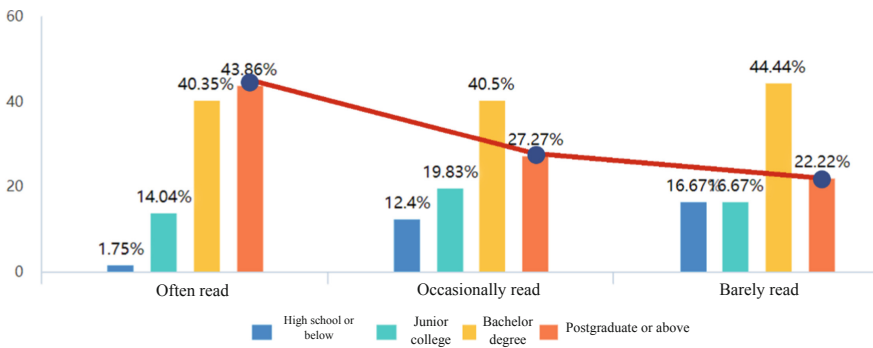


Fig. 2. Cross-analysis of parental education and accompanying reading frequency.

5.2 The Relationship Between Parental Education and the Frequency of Accompanying Reading: Positive Correlation, the Higher the Degree, the Higher the Frequency of Accompanying Reading

According to the parents' educational background and the frequency of reading with their children, the higher the educational level, the higher the frequency of reading together with the children. Parents with a bachelor's degree read with their children across a wide range of frequencies, with roughly the same proportions of frequent reading, occasional reading, and basic non-reading ("Fig. 2").

5.3 Cognitive and Emotional Picture Books are Preferred by Parents

In terms of the selection of specific picture book types, moral education picture books are the most popular among parents, accounting for 66.8%; secondly, cognitive, popular science, and family picture books are also highly recognized by parents. The choice of picture books for entertainment and aesthetic art is relatively low. On the whole, parents have high expectations for cultivating good morals in their children through picture

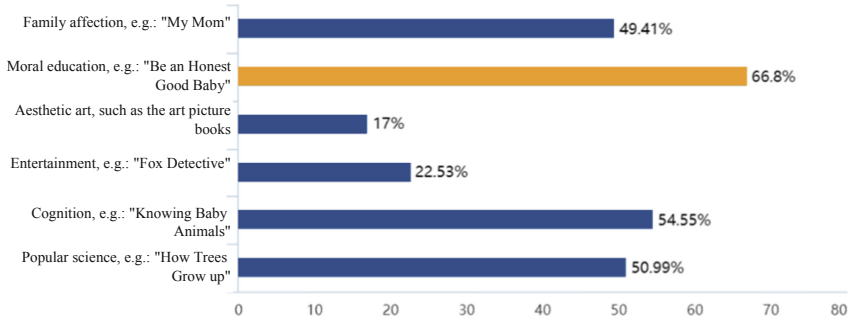


Fig. 3. Demand analysis of picture book types.

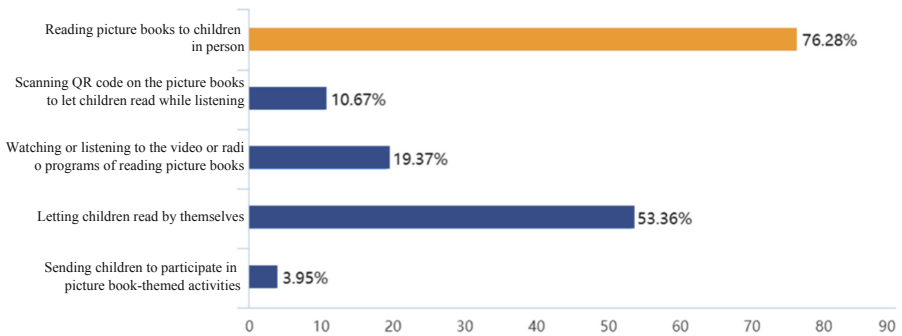


Fig. 4. Analysis of accompany reading habits.

book education. It can be seen that picture books on moral education and family love have priority market potential. Cognitive and popular science picture books point to the training of children's intelligence ("Fig. 3").

5.4 Parents Reading with Children at Home is the Most Important Picture Book Education Scene

In terms of the way of reading picture books, "reading picture books to children in person" accounted for the highest proportion, with 76.28% of parents using this method, and "letting children read by themselves" was also used by more than half of them. And the least number of people selected "send children to participate in picture book-themed activities". Most parents have low awareness of the professionalism and effectiveness of picture book libraries, coupled with price sensitivity, resulting in fewer purchases of picture book-themed activities ("Fig. 4").

5.5 Cognitive Function of Picture Books: Picture Books are a "Medium" that Enriches Children's Childhood Life and Enhances Their Imagination

In this survey, picture books have the highest proportion as a role in enriching children's life and imagination, accounting for 65.22% of the total number, followed by tools that lay

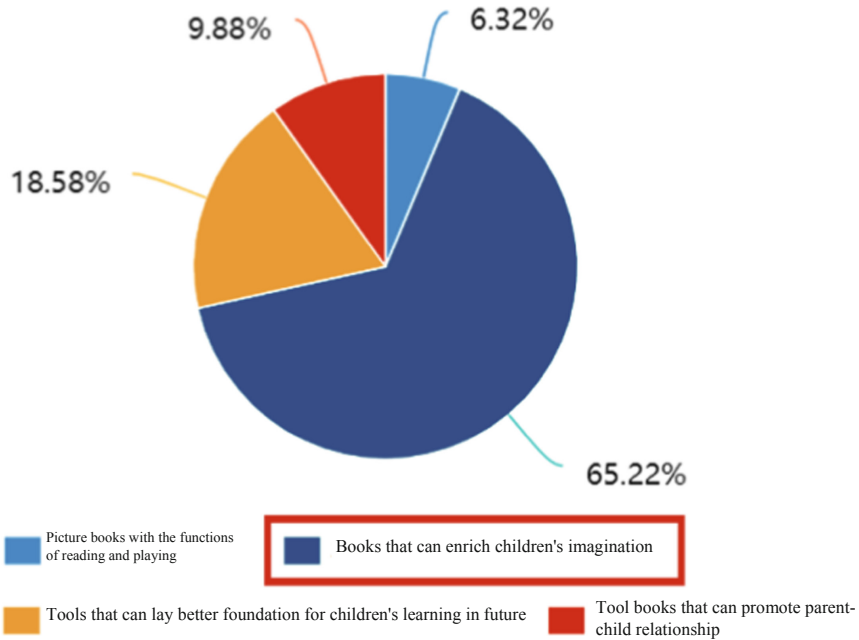


Fig. 5. Cognitive analysis of picture book functions.

a better foundation for children’s future learning, accounting for only 18.58%. Because of its large number of illustrations and a small amount of text, picture books are more interesting and vivid than pure text books, and their function of cultivating children’s imagination is a more universal cognition of parents. However, parents’ understanding of the role of picture books in the following aspects is still shallow: children’s language communication and expression, accumulation of knowledge and experience such as astronomy, history and geography, etc., which lay the foundation for learning, improving the spiritual realm, and building a spiritual paradise, so as to cultivate children’s perfect personality, promote parent-child relationship, etc. (“Fig. 5”).

5.6 Cognition of Problems in Buying or Reading Picture Books: Picture Books are Low Cost-Effective, Difficult to Manage Children’s Attention, and Less Time to Spend with Reading

According to the survey results, it is believed that “it is not cheap to buy picture books, but children will finish reading soon, so it is not cost-effective” is the most common problem parents encounter in the process of buying and reading picture books. Followed by “children can’t concentrate when reading picture books”, “there are few words in picture books, don’t know how to read to children”, “the children don’t understand or are not interested in the content”. In others, not having enough time and energy is also a common problem. It can be seen that the payment cost of family picture book education is an important factor affecting parents’ decision to consume picture books; secondly, parents do not have the ability and time to guide and educate children about picture

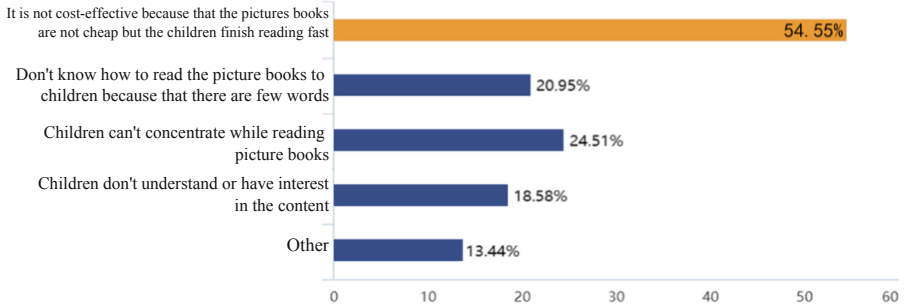


Fig. 6. Pain point analysis of picture book demand.

books, which interferes with their energy investment. Therefore, in the later promotion of this picture book library project, on the basis of emphasizing the importance of picture book education, it should emphasize the information output of professional picture book libraries to help parents improve educational efficiency and liberate time and energy (“Fig. 6”).

6 Countermeasures and Suggestions for the Development of Picture Book Market in China

6.1 Focusing on the Development of Original Children’s Picture Book Brands to Fill the Gap in the Children’s Book Market

Since the category with the highest market share in the children’s book market is still children’s popular science and early childhood enlightenment books, most brands do not focus on the field of picture books, but mainly promote the sales of picture books through the introduction of IP and copyright. Brands that focus on original children’s picture books are basically blank, so there is huge room for development of original children’s picture book brands.

6.2 Compared with Form Innovation, Picture Book Innovation Should Pay More Attention to Content Innovation, Especially Cognitive and Emotional Picture Books are Most Favored by Parents

Due to the difficulty of innovating the content of picture books, the cycle is long and the effect is slow, the innovation of domestic picture book brands mainly focuses on form innovation, such as hole books, finger books, etc., to increase the sense of interest in picture books, and the degree of content innovation is not high. However, market data and questionnaire data show that parents have pain points in the demand for picture books with original content such as traditional culture, cognition and emotion. This is the blue ocean of the picture book market in China, and creators should pay more attention to content innovation.

6.3 Parents Have Cognitive Blind Spots in Picture Book Education, and It is Necessary to Strengthen the Popularization of the Concept of Picture Book Education, and Promote the Healthy Development of the Picture Book Market

At present, the major picture book brands in China are still in the competitive situation of winning the market with products, so they pay more attention to the planning of picture book products rather than the popularization of picture book education concepts, and most of them do not involve picture book education courses or activities. However, children's picture book education as an "imported product" is not mature enough in China. Parents' understanding of picture books will be affected by factors such as education level and economic level. The survey results also show that the higher the parent's education, the higher the proportion of accompanying picture books. In general, parents do not have professional guidance when choosing picture books, so parents generally believe that picture books have problems of low cost performance and difficulty in reading. A backward view of children's education can easily lead to a backward view of picture book consumption. A backward consumer market cannot force creators to create excellent works, which is not conducive to the healthy development of the picture book market.

7 Conclusion

Children's picture books, as the top three categories in the children's book market, have a strong market potential today when young parents are paying more and more attention to the enlightenment education. However, in the face of the market pain points of high price of picture books, difficult to read, and fast replacement, the industry's solutions are still mainly based on online borrowing and electronic, audio-visualization, and the market value of picture book reading has not been fully developed. At the same time, the industry is also faced with the current situation of introducing picture books and IP picture books. Original picture books and traditional cultural picture books have great growth potential. The development of picture book education in China should pay more attention to professionalism, picture book content innovation and the popularization of picture book education concepts.

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