

Trends in the E-publishing Market

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Бизнес-школа для молодых российских редакторов, книгоиздателей и книгораспространителей проводится при финансовой поддержке Федерального агентства по печати и массовым коммуникациям в рамках
Года литературы в России — 2015

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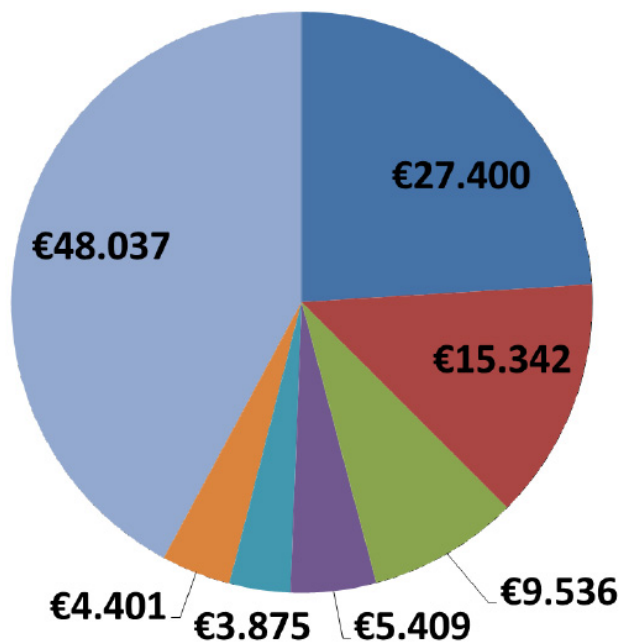
Topics

- Publishing and e-publishing markets
- E-publishing market: countries
- What's next? – predictions
- Reading habits
- More information

Publishing and e-publishing markets

Largest book markets

**Global publishing
(market value, bn€, 2013)**



- United States
- China
- Germany
- Japan
- United Kingdom
- France
- Rest of the world (est.)

*The largest publishing markets, at retail value.
(Source: Wischenbart: Global Publishing Monitor, International Publishers Association, 2014.)*

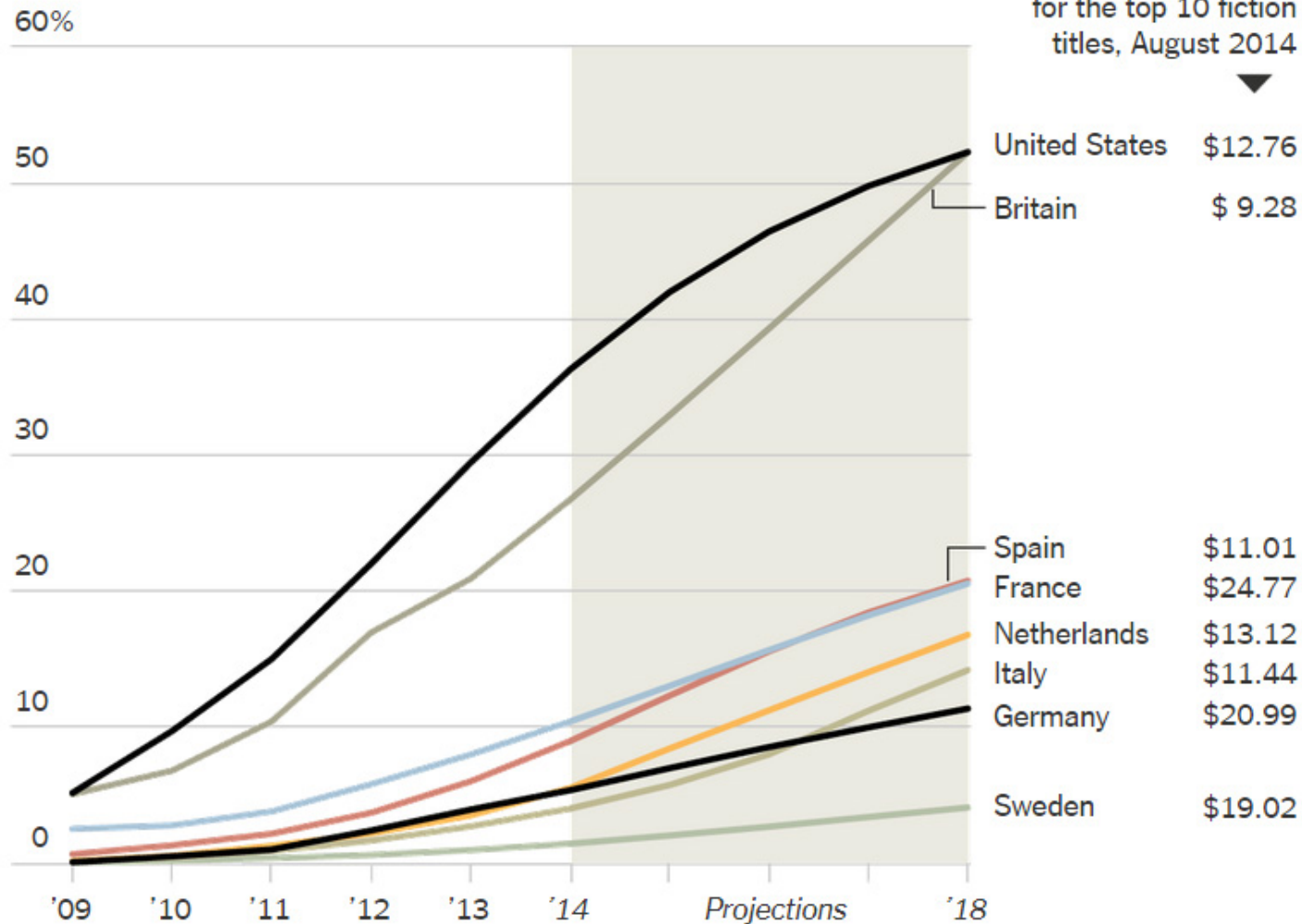
Ebook market is growing

"Overall, the eBook market makes up about \$14.5 billion in sales globally and is expected to reach more than \$22 billion by 2017."

Michael Tamblyn,

President and Chief Content Officer, Kobo (Dec. 2, 2014)

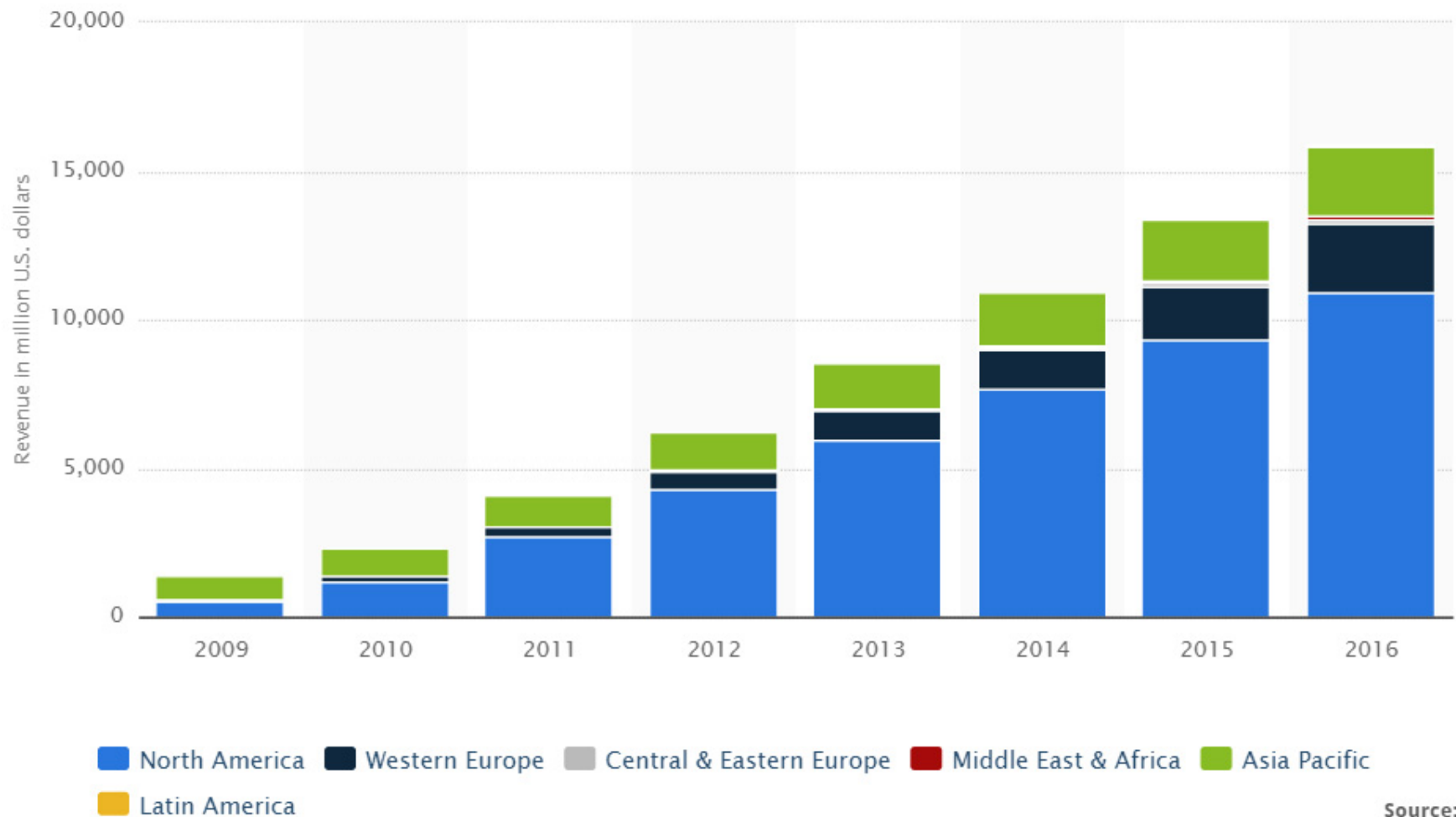
E-book share of total consumer publishing revenue



Sources: PricewaterhouseCoopers, Rüdiger Wischenbart

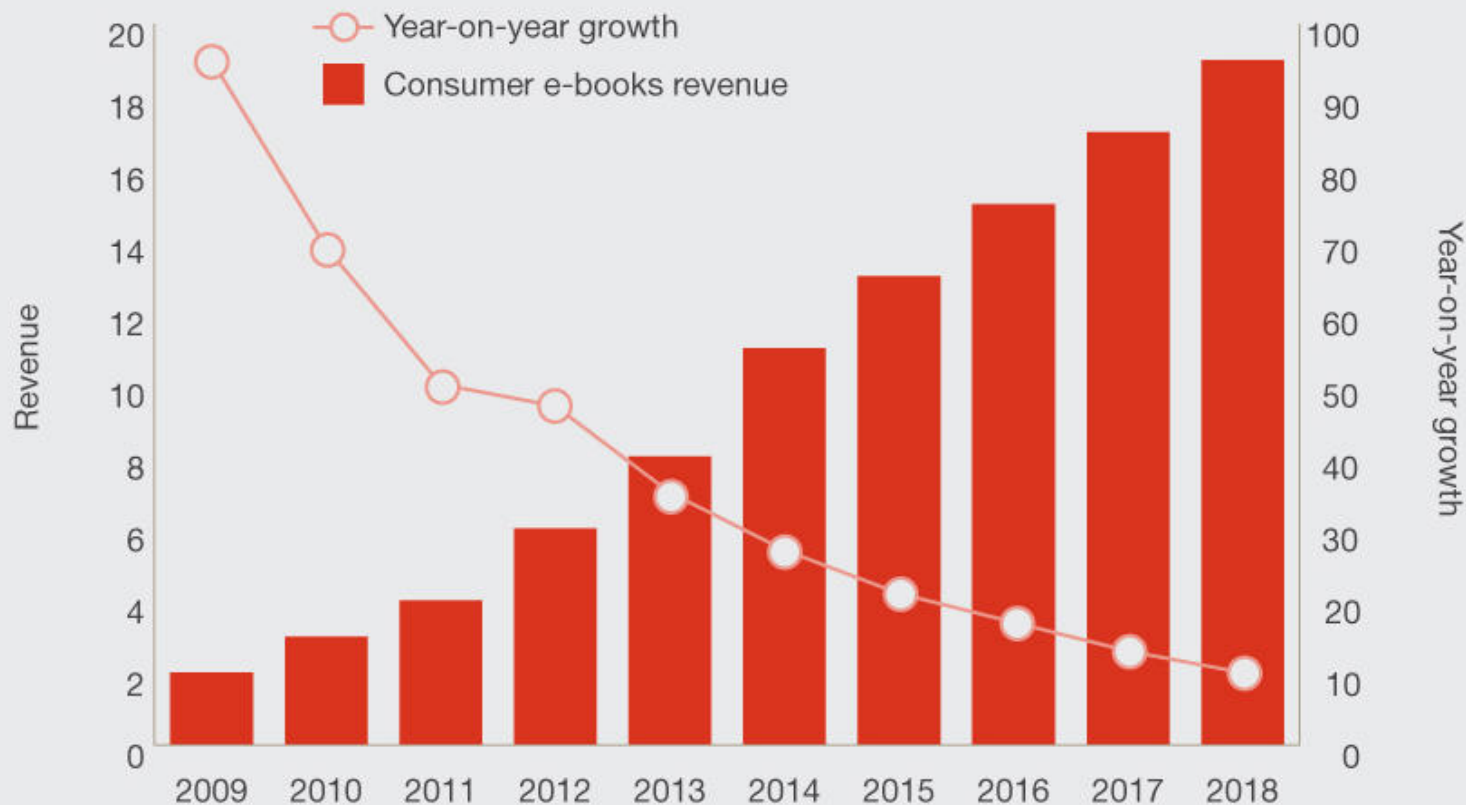
A version of this article appears in print on November 13, 2014, in The International New York Times.

Global e-book revenue from 2009 to 2016*, by region (in million U.S. dollars)



As the e-book market matures and competition in the consumer e-book market increases, growth has slowed

Global consumer e-books revenue (US\$bn) and year-on-year growth (%), 2009–2018



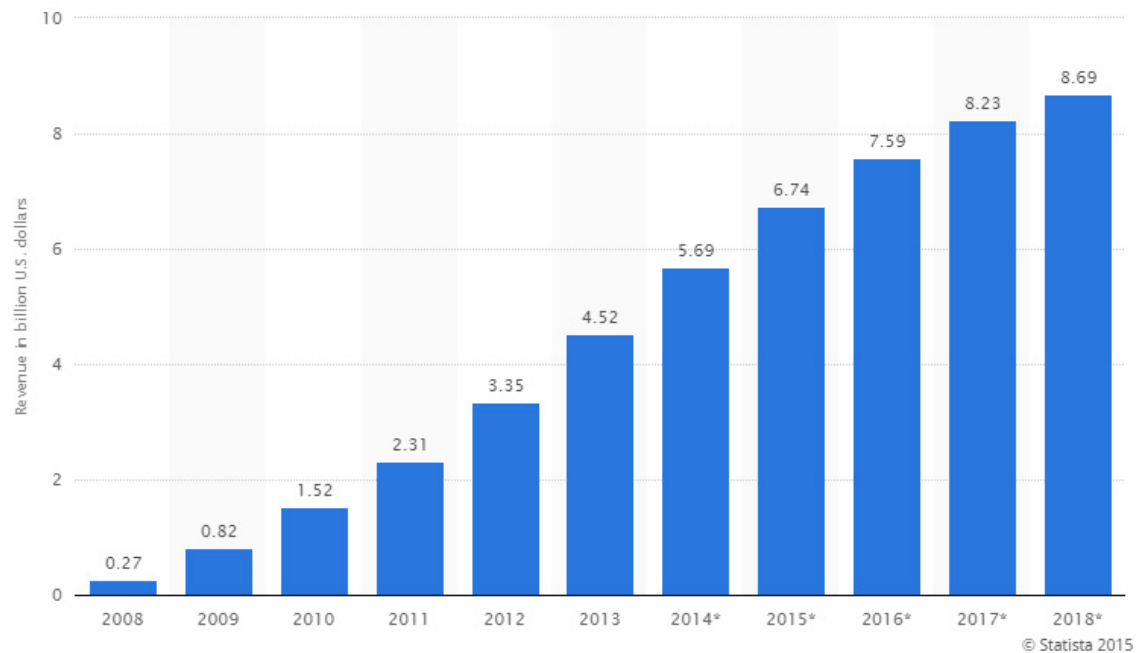
E-publishing market: countries

USA
UK
Germany
France
Italy
Netherlands
Japan
Russia

E-publishing in USA

1. Ebooks account for 13% of of total trade market and 27% of fiction market (2014)
2. 31% of ebook publishers produce enhanced ebooks
3. Amazon.com is the most popular and lucrative sales channel

Revenue from e-book sales in the United States from 2008 to 2018 (in billion U.S. dollars)



Revenues, (USA, 2014)

TOTAL TRADE* NET REVENUE – BY CATEGORIES (in millions)

	Jan. - Dec. 2014	Jan. - Dec. 2013	Percent Change
TOTAL TRADE*	\$7184.3	\$6919.7	+3.8%
Adult Fiction/Non-Fiction	\$4743.9	\$4811.6	-1.4%
Children's/Young Adult	\$1886.7	\$1561.5	+20.8%
Religious Presses	\$553.8	\$546.6	+1.3%

TOTAL TRADE* NET REVENUE – BY FORMATS

	Jan. - Dec. 2014	Jan. - Dec. 2013	Percent Change
Total Trade eBooks	\$1582.0	\$1510.9	+4.7%
Total Trade Hardback	\$2556.5	\$2569.3	-0.5%
Total Trade Paperback	\$2111.7	\$1950.5	+8.3%

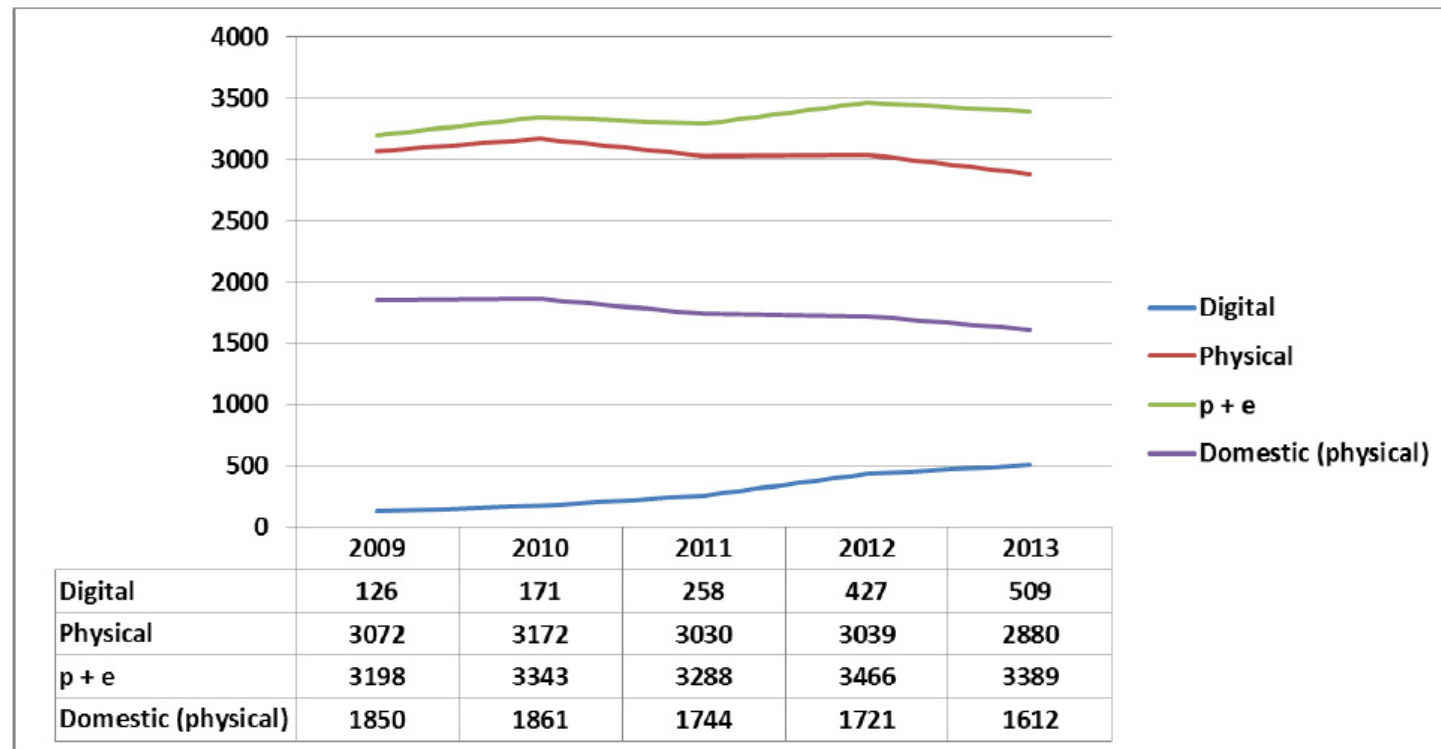
*Total Trade includes all formats in Adult Fiction/Non-Fiction, Children's/Young Adult and Religious Presses.

January 2015 ebook sales were down 8 percent from January 2014.
Ebooks had 24 percent of sales this January, compared to 27.5 percent a year ago.

E-publishing in UK

1. Ebooks account for 11.5% of of total trade market and 25% of fiction market (2014)
2. Ebook market in 2014 on year rise of 18.5%
3. Self-published books' share of the UK market grew by 79% in 2013

*Growth in digital
and decline in
physical in the UK,
2009 to 2013.
Source: PA Statistics
Yearbook 2013.*



E-publishing in Germany

1. 4.3% share of ebooks in the total trade market (10% of fiction market)
2. Tolino, Germany's Alternative to Kindle
3. Massive growth in self-publishing





SMARTPHONE

84%

32% utilisent leur smartphone comme support de lecture et la lecture de livres numériques représente 9% de leurs usages sur ce support.



TABLETTE

55%

71% utilisent leur tablette comme support de lecture et la lecture de livres numériques représente 19% de leurs usages sur ce support.



ORDINATEUR HYBRIDE

9%

48% utilisent leur ordinateur hybride comme support de lecture de livres numériques.



ORDINATEUR PORTABLE

80%

45% utilisent leur ordinateur portable comme support de lecture et la lecture de livres numériques représente 8% de leurs usages sur ce support.



LISEUSE

25%

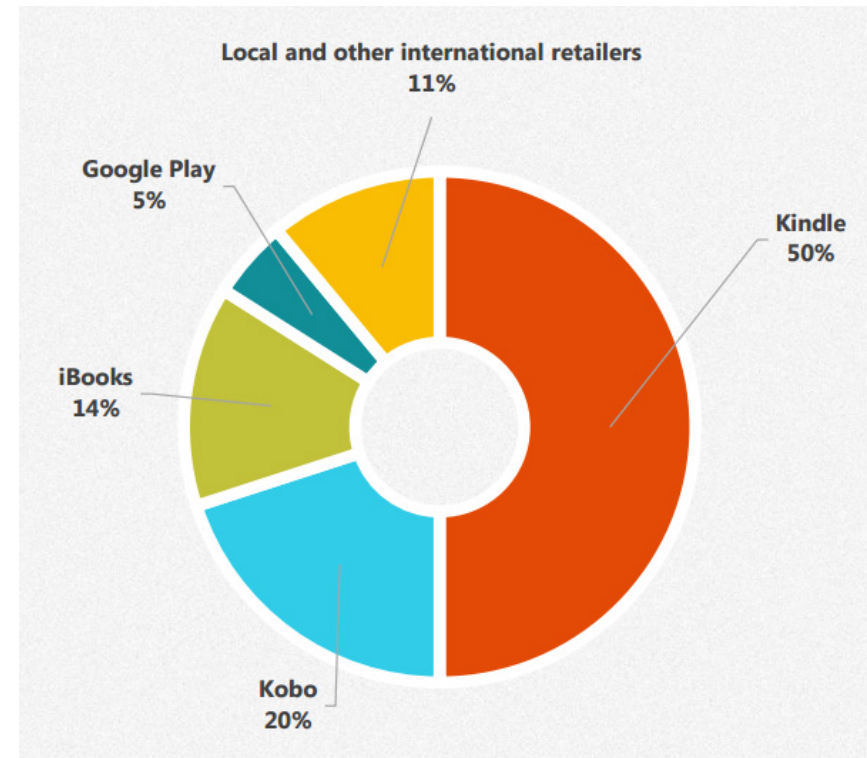
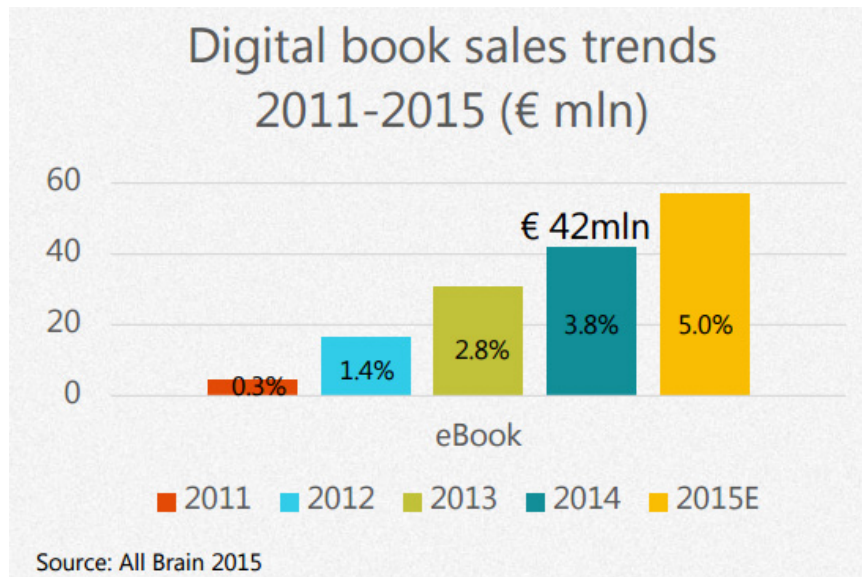
90% utilisent leur liseuse comme support de lecture et la lecture de livres numériques représente 82% de leurs usages sur ce support.

E-publishing in France

1. Ebooks had 1.1% of total market share and 3% of fiction (2014)
2. 62.5% of publishers now offering eBooks
3. The number of e-book readers is increasing
4. Smartphones are increasingly being used for reading

E-publishing in Italy

1. Ebooks represent the 4-5% of the market in 2014
2. Estimates a growth of 30-40% and reach 5% of total book market in 2015



E-publishing in Netherlands

1. Ebooks made up 26% of online sales and 5.2% of total sales in 2014
2. Dutch publishers distribute 37,190 titles (2014)
3. Two-thirds of the ebook sales being tracked involved either no DRM or minimal DRM

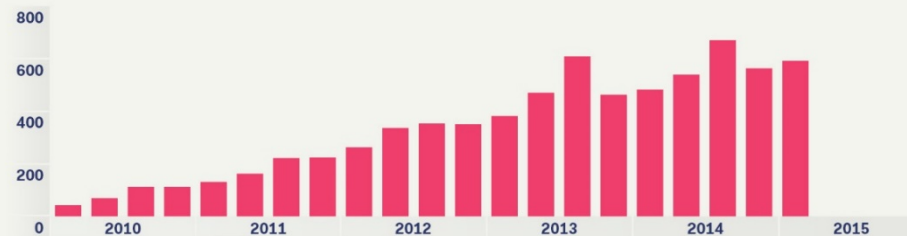
the development of e-books in the Dutch language market (Q1 2015)

Source: GfK (December 2014).

sales

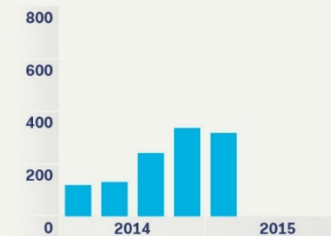
sold

quarterly (x 1.000)



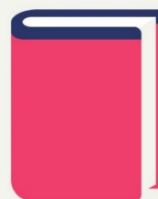
loaned¹

quarterly (x 1.000)



'In Q1 2015 the sales of e-books were 22% higher than the same quarter of the year before.'

share of e-books in total book sales²



5,2%
digital

94,8%
physical

share of e-books in online book sales²



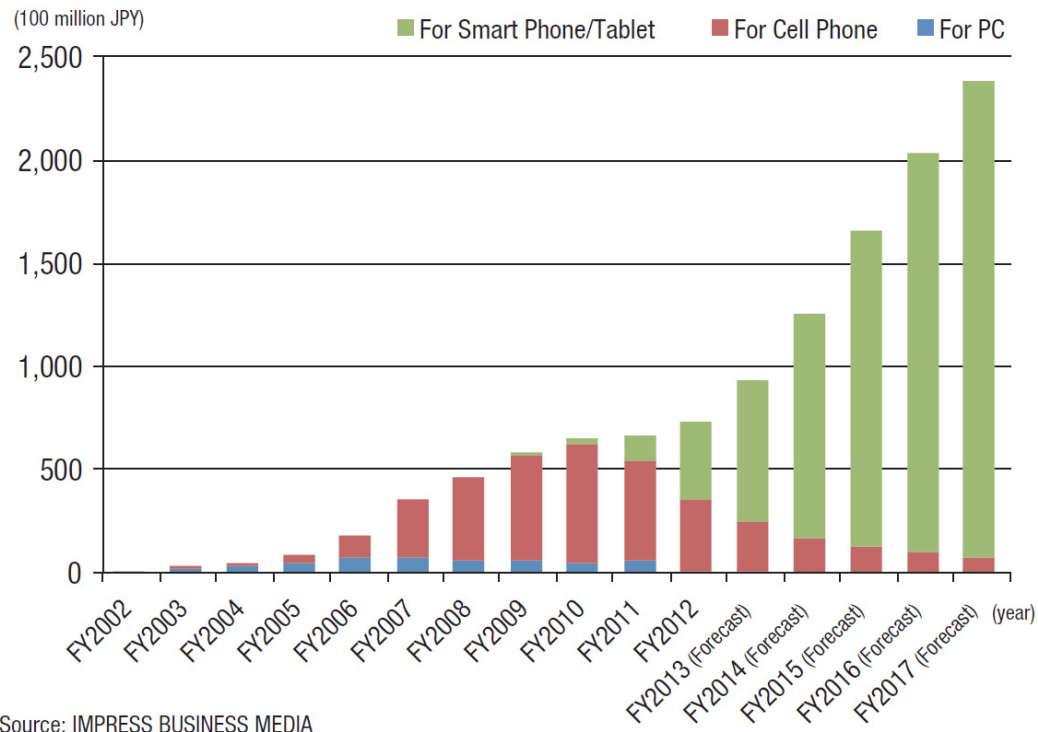
26,7%
digital

73,3%
physical

E-publishing in Japan

1. Ebooks had 10% of total market share in 2013
2. Comic was still breadwinner in the digital market

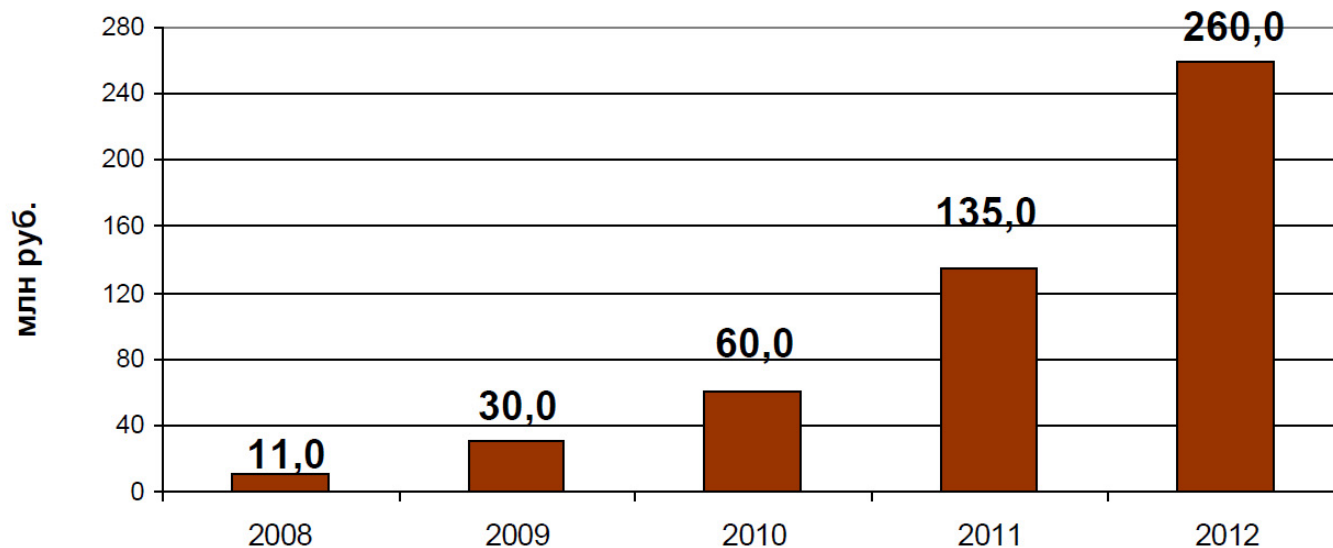
Estimated Size of Japan's Digital Book Market



E-publishing in Russia

1. Ebook market in 2012 reached 260 млн руб. – 0.5% share of all book market
2. 70% of Russian readers read ebooks, according to a survey in 2013
3. 2013 market share of ebooks >1%
4. Very high impact of piracy (but yet, 10,000 legal downloads have been recorded for *Shades of Grey* in 2012.)
5. National digital library (in 2015)

Динамика роста легального рынка электронных книг в России в 2008-2012 гг., млн руб.

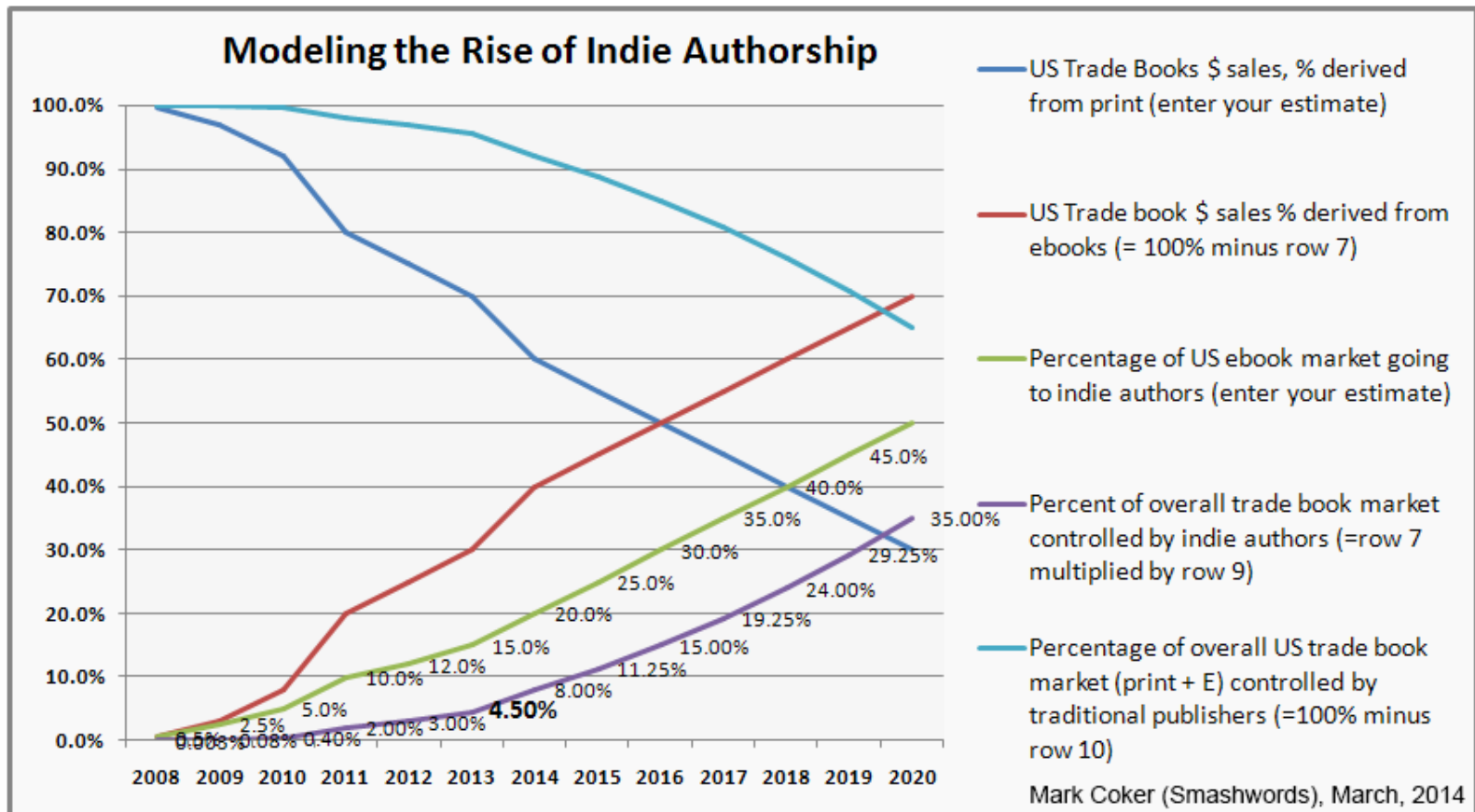


Источник: компания «ЛитРес».

What's next?

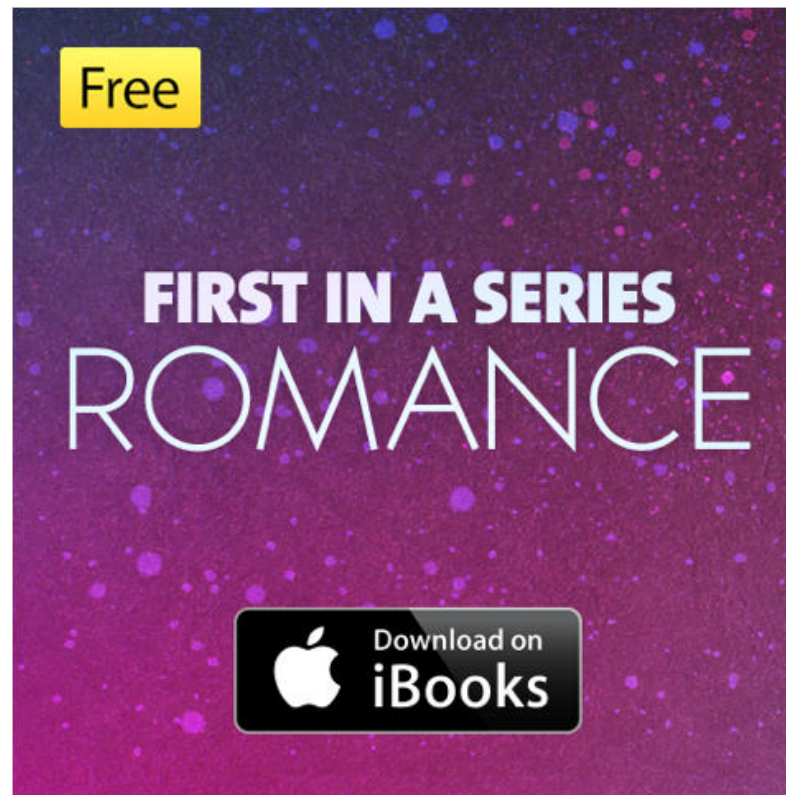
Book publishing industry predictions:

More self-publishing (indie) authors on ebook market



Book publishing industry predictions:

Self publishers face increased competition from traditional publishers



Book publishing industry predictions: Many self publishing authors will quit in 2015



Image source: Indiereader.com

Book publishing industry predictions:

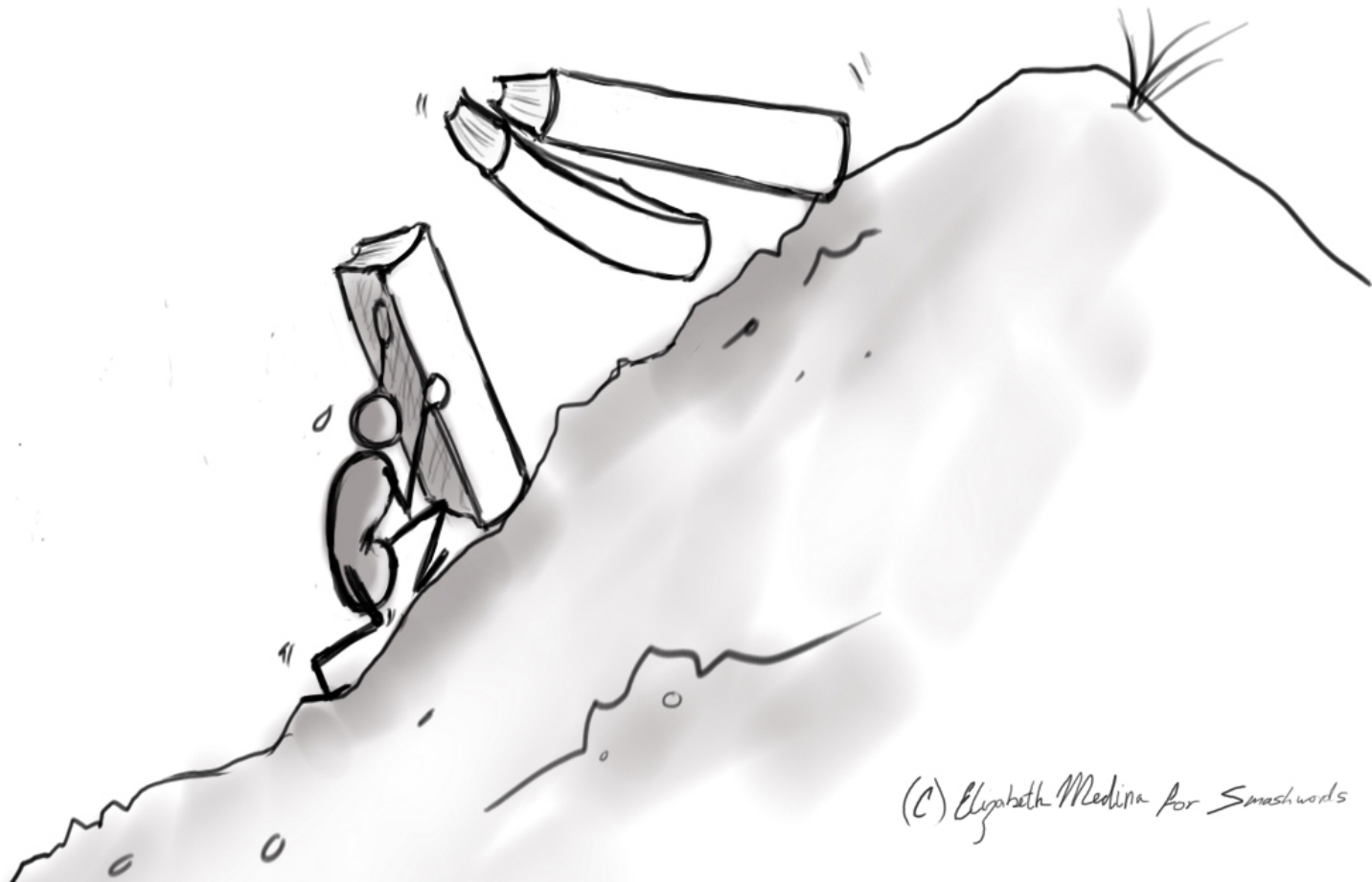
Print ant traditional bookstores will continue to decline



Book publishing industry predictions: Screen reading will increase (slowly)



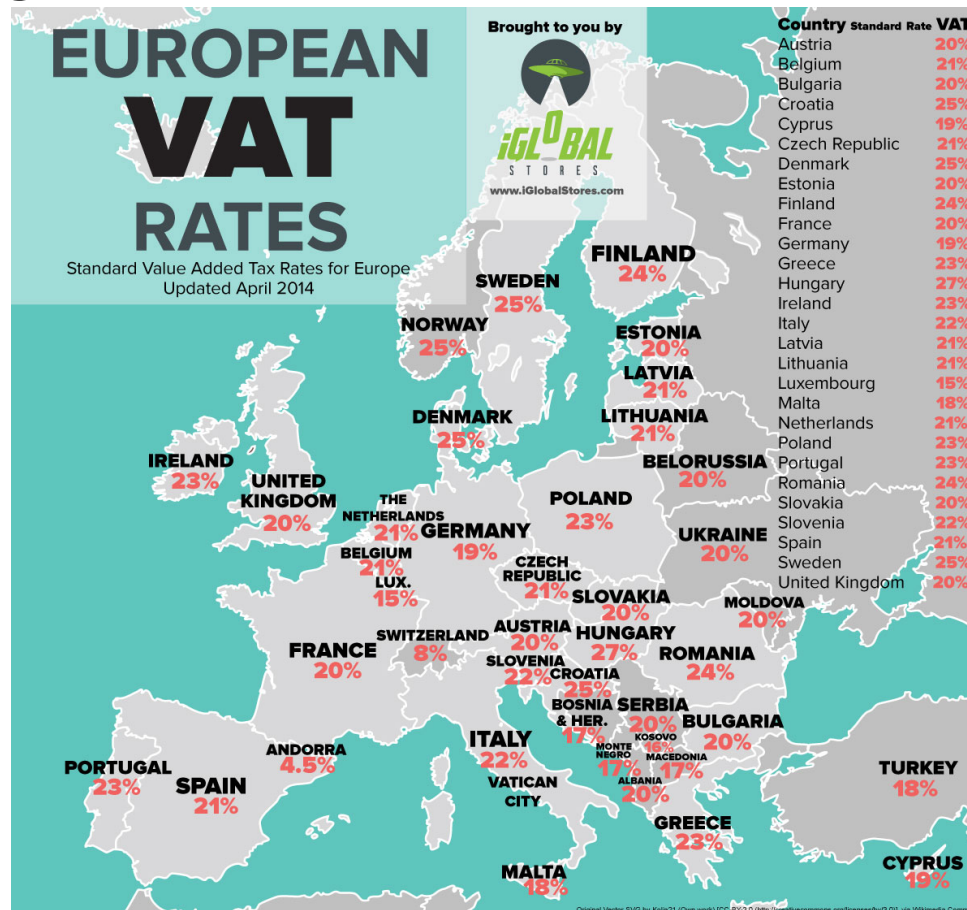
Book publishing industry predictions: Exponential sales growth is over



(C) Elizabeth Medina for Smashworks

Book publishing industry predictions:

New VAT rules in Europe will slower European ebook sales



Book publishing industry predictions: Ebook Subscription Services Arise

OYSTER

Scribd.

kindleunlimited

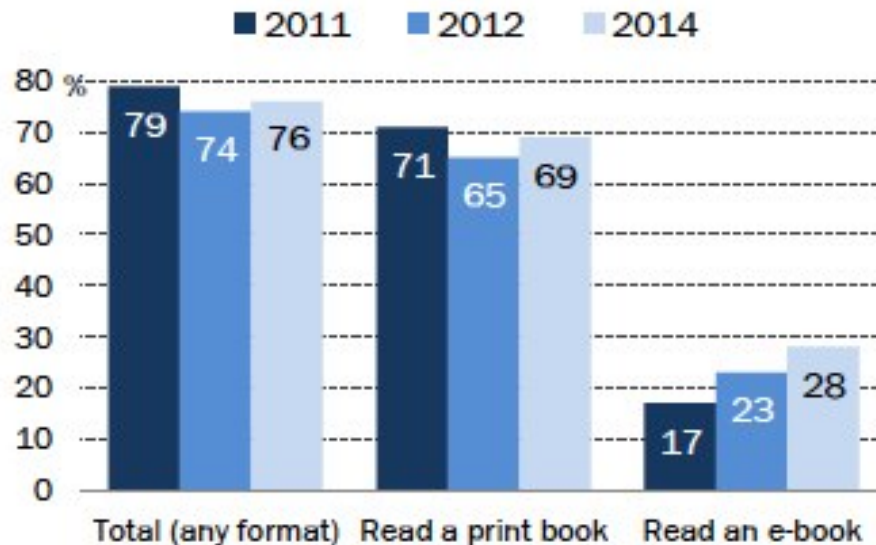
BOOKMATE

24symbols

Reading habits

Most adults read a book in the past year; print remains most popular, but e-reading is on the rise

Among American adults 18 and older, the % who read at least one book (in total, in print, or as an e-book) in the past year



* "Total" also includes those who listen to audio books (not shown).

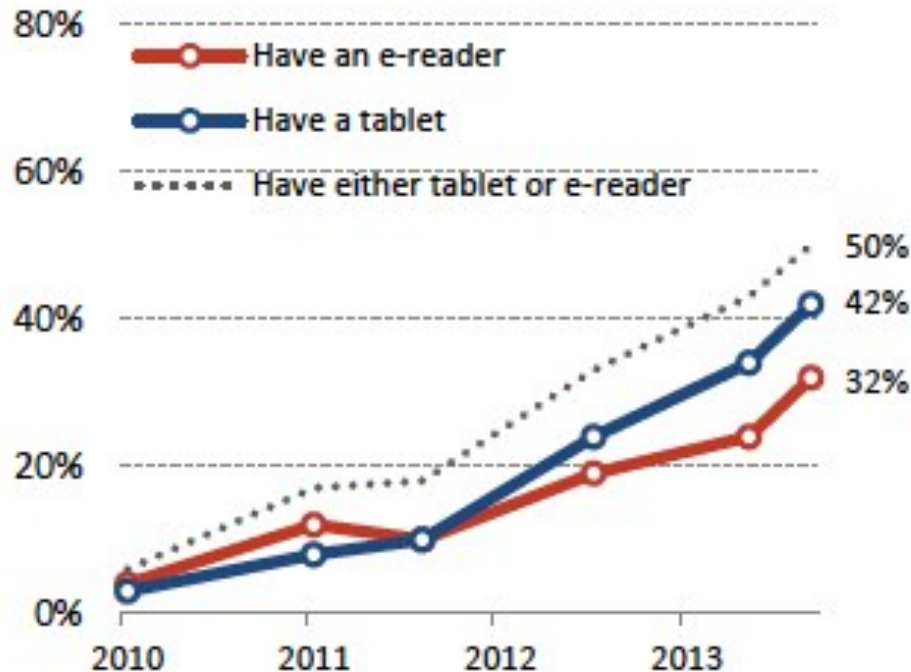
Source: Pew Research Center's Internet Project Omnibus Survey, January 2-5, 2014. N= 1005 American adults ages 18 and older. Interviews were conducted on landlines and cell phones, in English and Spanish.

PEW RESEARCH CENTER

Reading habits (USA, 2014)

Half of American adults now own either a tablet or an e-reader

% of American adults ages 18+ who own each device



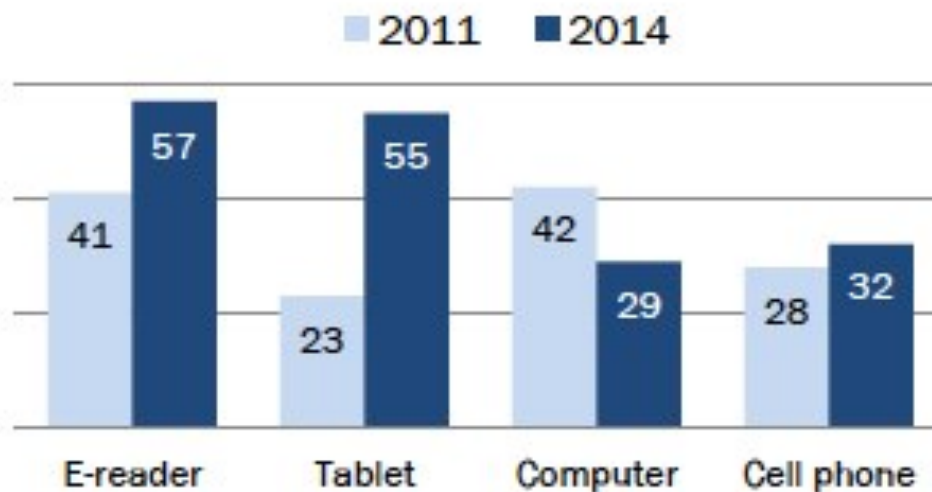
Source: Pew Research Center's Internet Project Omnibus Survey, January 2-5, 2014. N= 1005 American adults ages 18 and older. Interviews were conducted on landlines and cell phones, in English and Spanish.

PEW RESEARCH CENTER

Reading devices (USA, 2014)

As tablet ownership grows, more use them for e-books

Among all e-book readers ages 18 and older, the % who read e-books on each device



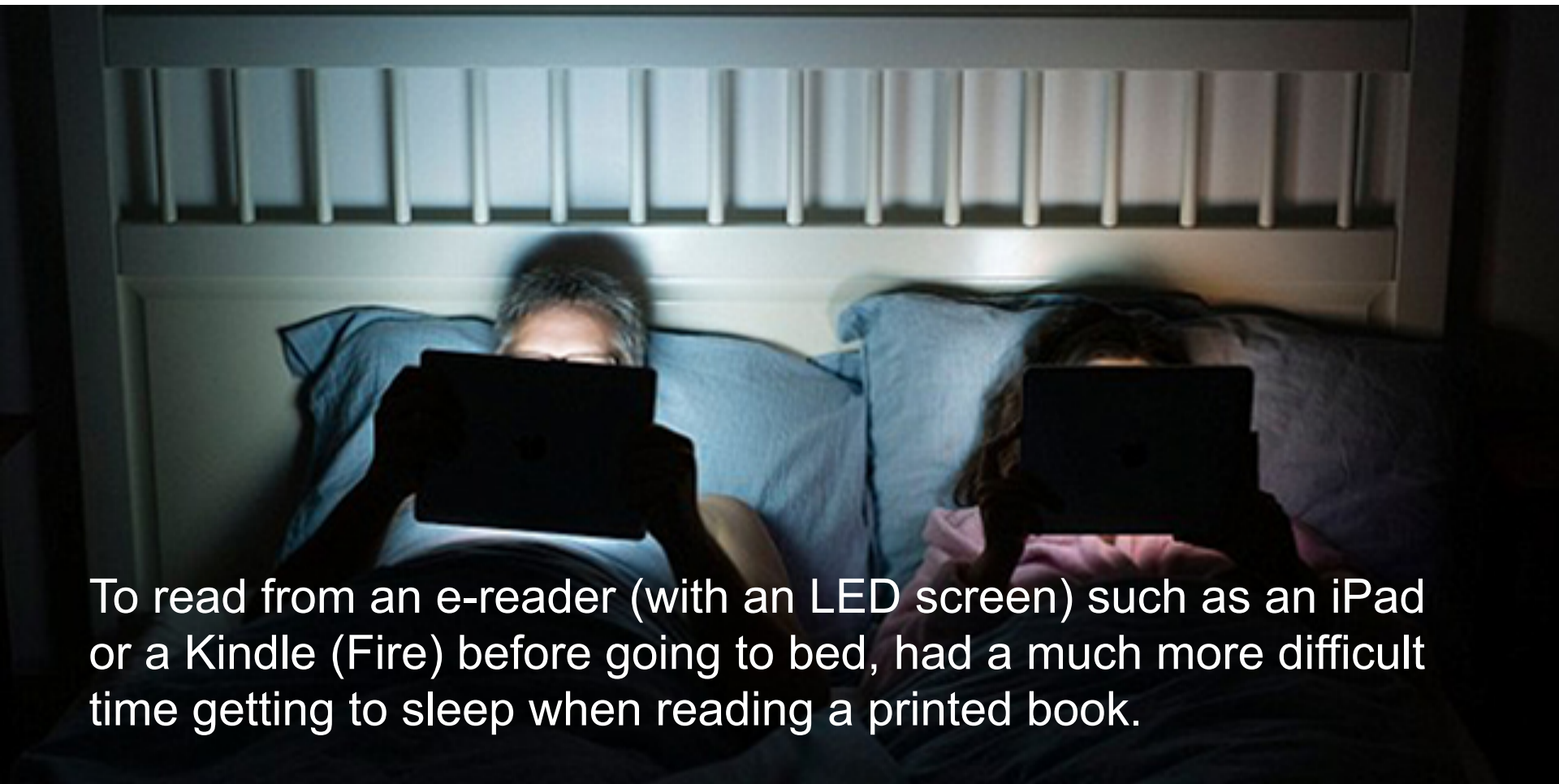
Source: Pew Research Center surveys, Dec 2011-January 2014.
Interviews were conducted on landlines and cell phones, in English and Spanish.

PEW RESEARCH CENTER

Reading devices (USA, 2014)

Digital reading and sleeping

November 26, 2014, Anne-Marie Chang at al.



To read from an e-reader (with an LED screen) such as an iPad or a Kindle (Fire) before going to bed, had a much more difficult time getting to sleep when reading a printed book.

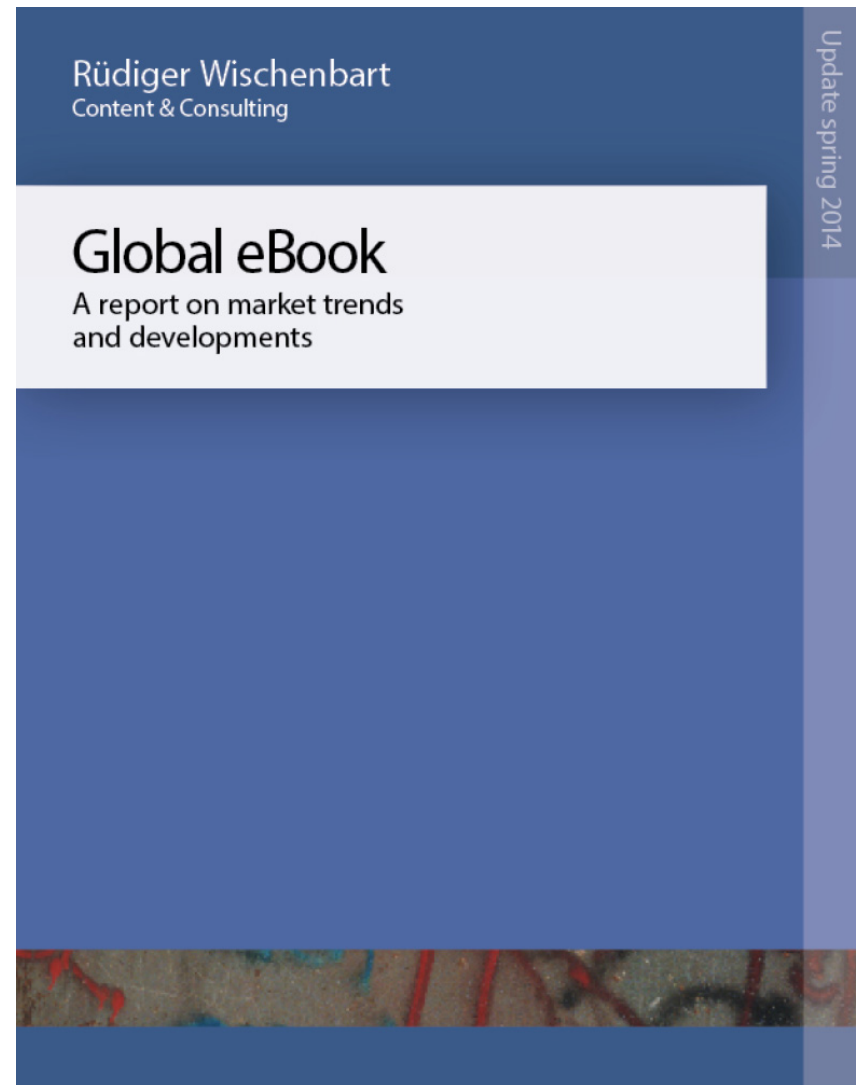
Summary

- Publishing and e-publishing markets
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- What's next? – predictions
- Reading habits

More information

Global eBook: A report on
market trends and
developments.

*Revised and updated edition April 2014.
Written by Rüdiger Wischenbart.*





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