Trends in the E-publishing Market

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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: €48.037
- China: €27.400
- Germany: €15.342
- Japan: €15.342
- United Kingdom: €9.536
- France: €9.536
- Rest of the world (est.): €3.875

The largest publishing markets, at retail value.
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

- United States: $12.76
- Britain: $9.28
- Spain: $11.01
- France: $24.77
- Netherlands: $13.12
- Italy: $11.44
- Germany: $20.99
- Sweden: $19.02

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)

- **North America**
- **Western Europe**
- **Central & Eastern Europe**
- **Middle East & Africa**
- **Asia Pacific**
- **Latin America**

Source: © Statista 2015
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

Source: Global entertainment and media outlook 2014–2018, PwC, Informa Telecoms & Media
E-publishing market: countries

USA
UK
Germany
France
Italy
Netherlands
Japan
Russia
E-publishing in USA

1. Ebooks account for 13% 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)

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<tr>
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<tbody>
<tr>
<td>TOTAL TRADE*</td>
<td>$7184.3</td>
<td>$6919.7</td>
<td>+3.8%</td>
</tr>
<tr>
<td>Adult Fiction/Non-Fiction</td>
<td>$4743.9</td>
<td>$4811.6</td>
<td>-1.4%</td>
</tr>
<tr>
<td>Children’s/Young Adult</td>
<td>$1886.7</td>
<td>$1561.5</td>
<td>+20.8%</td>
</tr>
<tr>
<td>Religious Presses</td>
<td>$553.8</td>
<td>$546.6</td>
<td>+1.3%</td>
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<tbody>
<tr>
<td>Total Trade eBooks</td>
<td>$1582.0</td>
<td>$1510.9</td>
<td>+4.7%</td>
</tr>
<tr>
<td>Total Trade Hardback</td>
<td>$2556.5</td>
<td>$2569.3</td>
<td>-0.5%</td>
</tr>
<tr>
<td>Total Trade Paperback</td>
<td>$2111.7</td>
<td>$1950.5</td>
<td>+8.3%</td>
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</table>

*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 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
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
E-books had 1.1% of total market share and 3% of fiction (2014)

62.5% of publishers now offering eBooks

The number of e-book readers is increasing

Smartphones are increasingly being used for reading

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

France's publishers' association data, 2015
KPMG S.A. data, 2014
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

Digital book sales trends
2011-2015 (€ mln)

Source: All Brain 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

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

- Share of ebooks in total book sales:
  - 5.2% digital
  - 94.8% physical

- Share of ebooks in online book sales:
  - 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

Source: IMPRESS BUSINESS MEDIA
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.)
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 and traditional bookstores will continue to decline
Book publishing industry predictions: Screen reading will increase (slowly)
Book publishing industry predictions: Exponential sales growth is over
Book publishing industry predictions: New VAT rules in Europe will slow European ebook sales
Book publishing industry predictions: Ebook Subscription Services Arise
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

<table>
<thead>
<tr>
<th>Year</th>
<th>Total (any format)</th>
<th>Read a print book</th>
<th>Read an e-book</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>79</td>
<td>71</td>
<td>17</td>
</tr>
<tr>
<td>2012</td>
<td>74</td>
<td>65</td>
<td>23</td>
</tr>
<tr>
<td>2014</td>
<td>76</td>
<td>69</td>
<td>28</td>
</tr>
</tbody>
</table>

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

% of American adults ages 18+ who own each device

- 80%  
  - Have an e-reader
  - Have a tablet

- 60%  
  - Have either tablet or e-reader

- 40%  
- 20%  
- 0%

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
### 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

<table>
<thead>
<tr>
<th>Device</th>
<th>2011</th>
<th>2014</th>
</tr>
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<tbody>
<tr>
<td>E-reader</td>
<td>41</td>
<td>57</td>
</tr>
<tr>
<td>Tablet</td>
<td>23</td>
<td>55</td>
</tr>
<tr>
<td>Computer</td>
<td>42</td>
<td>29</td>
</tr>
<tr>
<td>Cell phone</td>
<td>28</td>
<td>32</td>
</tr>
</tbody>
</table>

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

PEW RESEARCH CENTER
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

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- What’s next? – predictions
- Reading habits
Global eBook: A report on market trends and developments.

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*Written by Rüdiger Wischenbart.*
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