

Rüdiger Wischenbart
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Global eBook

*A report on market trends
and developments*



Global eBook 2016

A report on market trends and developments

Written by **Rüdiger Wischenbart**, together with **Carlo Carrenho** (Brazil), **Dayou Chen** (China), **Javier Celaya** (Spain), **Yanhong Kong** (China), **Miha Kovac** (Central and East Europe), and **Vinutha Mallya** (India). Additional research by **Julia Coufal** and **Jennifer Krenn**.

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Main topics and structure of the Global eBook report (2016)

This report provides an overview of internationally evolving ebook markets, with a unique set of data from a wide array of the best available sources, a thorough analysis and a synopsis of key global developments, and a broad set of detailed references to both global and local actors, forming a resource for anyone interested in the globalization of digital (book) content production and dissemination.

The *2016 edition of the Global eBook report* portrays international consumer book publishing at a critical moment. Over the past few years, a traditionally conservative industry, occupying a core position in the creative sector of today's knowledge societies, had to confront mostly declining physical sales, while the emerging digital business had caught on with force only in the English language markets, notably in the United States and in the United Kingdom, and even here was only occasionally able to compensate for the loss in print books. Since 2013, digital has shown hardly any further expansion, at least for the traditional publishing sector.

Some indicators however point to a parallel shift towards global players, primarily Amazon, and to non-traditionally (independently or self-) published authors.

In most of continental Europe, ebooks have stalled even earlier, while the slide in physical sales was even more radical, particularly driven by the fallout of the economic crisis of 2008. Particularly markets like Spain or Italy have been hit hardest.

2015, remarkably, has seen a process of stabilization in many markets, with independent publishers and retailers gaining ground again. Also ebooks, while often stagnant overall, have been able to occupy significant niches.

In most of the emerging economies, such as China, Brazil, India, or Russia, the broadly admired surge of book markets has slowed down (in China, for instance), or become flat (in Brazil), or even has been reversed for several years (in Russia).

Altogether, what we currently see is most probably the "end of the digital beginning", and the beginning transition into the next, perhaps even more challenging phase, where writing, publishing and reading morph into fluid settings, where any content, in any format, is available for almost any user - yet without much stability both with regard to who is offering what, as well as how that offer is taken in by the many fickle audiences around the world.

For the *2016 edition of the Global eBook report*, the challenge was to subsequently broaden our perspective, by looking at both physical and digital developments, and so with more context than in previous years, with over 50 charts and tables summarizing and visualizing complex market developments.

We chose to extend our data driven analysis in several directions:

- Portray current market developments on the backdrop of at least 4 to 6 years of history;
- Look at both print and digital in direct comparisons;
- Widen significantly the scope, and angles, of our data analysis, notably with the help of partners from distributors and various industry observers, to gain much more specific insights into several market segments;
- Include a broader analysis of piracy offerings, as they allow again a broader understanding of users's digital preferences and habits; and finally,
- Update all the bits and pieces on market comparisons, global players, and key debates, which we had incorporated already in past years.

The *findings* of the *Global eBook* report allow us to assess, on the one hand, how the main drivers of digital change in the publishing industry impact on international markets in similar ways, as self-publishing, reading platforms and distribution infrastructures become available, and as publishers in all markets have become under enormous pressure of consolidation to ever larger entities. Remarkably, this opens at the same time new opportunities for both new entrants, and smaller, independent players as well. "Ebooks" are not one thing, or format, or concept - but rather a shortcut for a wide array of options to do things differently.

The Global eBook report 2016 consists of 4 main sections

Publishing - print and digital - in the global context:

- Book publishing by key statistics in comparison to other media industries (e.g. music, filmed entertainment, games);
- An overview of the largest book publishing markets, plus an analysis by sector (trade, educational and STM);
- Comparative chapters on digital developments at the largest corporations and on the recent consolidation in the publishing industry

Market close ups, detailing key figures and key developments:

- English language markets (US, UK);
- Selected European markets, notably Germany, Austria, France, (Wallonian) Belgium, Spain, Italy, the Netherlands, Sweden, Denmark, and an overview on Central and Eastern Europe;
- Emerging markets, notably Brazil, China, India, and Russia;

Thematic chapters on key drivers and debates shaping the ebook markets:

- The expansion of global platforms, notably detailing developments at Amazon, Apple, Rakuten Kobo, as well as a summary of Germany's Tolino reaching out into other European markets;
- A significantly expanded chapter, drawing on new data sources, to shed some light on ebook developments by subsectors, by pricing segments and pricing strategies, and by comparing all this across selected European markets;
- A comparison of piracy platforms in Germany, France, Spain, Italy and Poland, to better understand users' preferences and changing consumption habits;
- Summaries of further important debates (on self-publishing, subscription platforms, DRM, and on regulation).

Global eBook Yellow Pages:

- A listing of over 350 companies dedicated to ebooks, consisting of publishers, service organisations, distributors and aggregators, with short company descriptions and links.

Extensive *references to key industry sources* provide direct access and links for further reading.

We strongly *encourage critical feedback* and -even more enthusiastically- the *input of information and data to improve the foundations of this analysis*.

About the Global eBook report

The [Global eBook](#) report has been initiated in fall 2011 by the *Tools of Change* conferences and [O'Reilly Media](#), and has been updated on a regular basis.

Since fall 2013, the report is published by [Rüdiger Wischenbart Content and Consulting](#) (RWCC), who had developed the format and authored the reports from the beginning.

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