

Rüdiger Wischenbart  
*Content & Consulting*

Update 2015

# Global eBook

*A report on market trends  
and developments*



# Executive Summary (2015)

## Main topics and structure of the Global eBook report (2015)

This report provides an overview of internationally emerging 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 *2015 edition of the Global eBook* report, which has not only updated previous versions, but is re-written entirely, particularly emphasizes how digital developments are embedded in the overall evolution of publishing markets, by providing context data as well as historical statistics to spot trends and developments over the past 3 to 5 years.

Main driving forces and policy as well as legal debates shaping the current transformation of the international book business are identified and looked at in country and market comparisons.

Traditional actors (such as publishing groups, or retail chains) as well as new players and business models (such as subscription services, but also changing piracy platforms) are portrayed in their individual characteristics and ambitions, and analyzed in context.

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 reading platforms and distribution infrastructures become available, and as publishers in all markets start to make their title catalogs available in digital formats. On the other hand, a wide array of local factors—from market size through tax and pricing regimes to cultural

choices—show that each market must be presented with its unique defining traits.

## **The Global eBook report 2015 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);
- The largest book publishing markets, plus an analysis by sector (trade, educational and STM);
- A close up on declining print markets, and to what extent digital can compensate for the physical loss;
- The market share of ebooks (by revenue) in a comparison of North American and European markets, and of the 5 largest publishing groups;
- A documentation and analysis of 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 Brasil, China, India, Russia, plus a summary on publishing trends in Hispanic Latin America;

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

- The expansion of global platforms, notably detailing developments at Amazon, Apple, and Kobo/Rakuten;
- An analysis of contradictory pricing strategies for ebooks across European markets, with data on historical trends and patterns with regard to retail prices for digital editions;
- An overview of self-publishing trends, by production data and platforms, and the share of self-published titles in selected markets, plus a summary on the debate on *author earnings*;
- An overview on subscription services, portraying a selection of the most prevalent platforms, and a comparison of key parameters;
- A comparative analysis of ebook piracy, by key parameters, in four European markets (Germany, France, Spain, Italy), and an analysis of anti-piracy strategies;

- A summary of the debate around DRM, with case studies for selected policies and approaches;

### Global eBook Yellow Pages:

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

An *index* and *cross references* facilitate to tracking players and topics across various chapters of the report.

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.

A *Spanish edition* of the Global eBook (fall 2013 update) is available at **Dos-Doce.com** .

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