

IMPACT OF CONTENT SUITABILITY AND READING HABITS ON E-BOOK CONSUMPTION

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The article investigates the impact of content suitability and reading habits on e-books consumption. It presents and interprets statistical data and numerous surveys' outcome related to the trend-setting book markets in the United States, the United Kingdom, Germany and France. The research focuses on the reading attitudes of the e-book consumers and reveals some of their specific preferences. Based on recent sales statistics, the most successful e-book product categories are identified. Differently from the usual interpretation of the readers' alternative choice between print book and e-book, the study indicates the content related preferences of the e-book readers. The article presents the content suitability for the e-book format as a key success factor on the digital book market.

Key words: book consumption, book publishing, e-books, reading habits, e-book market, readers' preferences

Introduction

The processes of globalization, the Internet, the broadband technologies, and the convergence are among the main milestones tracing the communication in the modern world. The evolution of mass media towards personalization, interactivity and mobility, as well as the media engagement of all social spheres, institutions and groups, have also provoked a number of transformations in the society. Today, these transformations are being catalyzed by the intense development of the media ecosystem, combining the traditional media with the potential of the blogosphere, the social networks, and the mobile communication technologies (Peicheva and Raycheva, 2016: 216-225).

One of the major phenomena in the media environment is the fast expansion of the digital publishing.

The UNESCO *Charter of Preservation of Digital Heritage from 2003* was the first globally recognized official act regarding the status of the digital publications as important part of the

cultural heritage. The e-books are collected and preserved in the national legal deposit institutions in more and more countries as valuable works which have to be preserved and made available for reading in the future. The enormous amount of electronic content uploaded daily on the Internet provoked the need to regulate the preservation at least of part of it. Many countries have made the respective changes in their legal deposit legislation in order to build all needed technological platforms and practical procedures for its realization (Alexandrov, 2018: 136-152; “Digital Legal Depot”, 2014; Totomanova and Stefanova, 2013: 106-127).

Once the technologies triggered the digital book publishing, companies and consumers reacted enthusiastically to this new opportunity. The fast growth of the e-book publishing in the first decade of the new century has built up high expectations among both publishers and readers. Therefore the radical forecasts for upcoming death of the printed books have not been limited to individual statements only, but have influenced the business strategy of small and big publishing companies.

The article aims to identify the product categories which suit best to the e-book format. The subject of the paper is the connection between the content suitability of the different types of e-books and their consumption level. Comparative and statistical analyses are applied in the interpretation of market data and surveys’ outcome. Most of the statistical input of the study consists of sales data, but some figures and facts are related to both paid and free access to e-books. Therefore the notion “consumption” has been preferred in the article title’s formulation. Usually the e-books are perceived and studied in comparison to the traditional print books. Differently from such approach, the study focuses on the e-book consumption only. Therefore the comparative analysis has not been applied in regard to readers’ choice between the print and electronic book format, but targets the specific preferences of the e-book consumers in different product categories.

The main tasks of the study could be formulated as follows:

- to analyze data and researches related to the e-book consumption;
- to examine the reading habits of the consumers in different e-book market segments;
- to identify the most successful e-book categories on the four studied markets;
- to indicate the specific readers’ preferences within the variety of e-book product categories.

The different types of e-book content do not follow the same market performance curve. The more the e-book markets develop, the clearer the differentiation of strong and weak e-book product categories becomes.

The study examines the reading practices related to only e-books without covering other digital publications such as audiobooks, electronic newspapers and magazines, tweets, Facebook messages, fora, and blogs. In terms of geographical scope the paper concentrates on the e-book markets in the United States, the United Kingdom, Germany and France. The research does not have the ambition to analyze all possible economic, technological and psychological reasons for the e-books sales crisis, which could be subject of much more comprehensive studies.

E-Book Market Trends

After the initial interest in the electronic books, the pace of their sales slowed down on many markets. The forecasts about sustainable e-book market growth and sharp decline of the print book market have not come true. Moreover the e-book sales fell down on the leading markets of the United States and the United Kingdom during the last three years and surprised all stakeholders of the book publishing chain. The e-book market share remained at one digit figure even in the largest European book market in Germany, where a decline of e-book sales revenue was registered for the first time in 2017 (“Das E-Book”, 2017).

The disappointment in the electronic publishing business has been recently expressed by Arnaud Nourry, Hachette Livre CEO: “I think the plateau, or rather slight decline that we’re seeing in the US and UK is not going to reverse. It’s the limit of the e-book format. We’ve tried. We’ve tried enhanced or enriched e-books - didn’t work. We’ve tried apps, Web sites with our content - we have one or two successes among a hundred failures.” (Anderson, 2018)

The e-book market trends result from a complex mix of regulatory, economic, technological, and psychological reasons, which go far beyond the limited subject area of this article. However, some of the factors influencing the e-book sales could be mentioned.

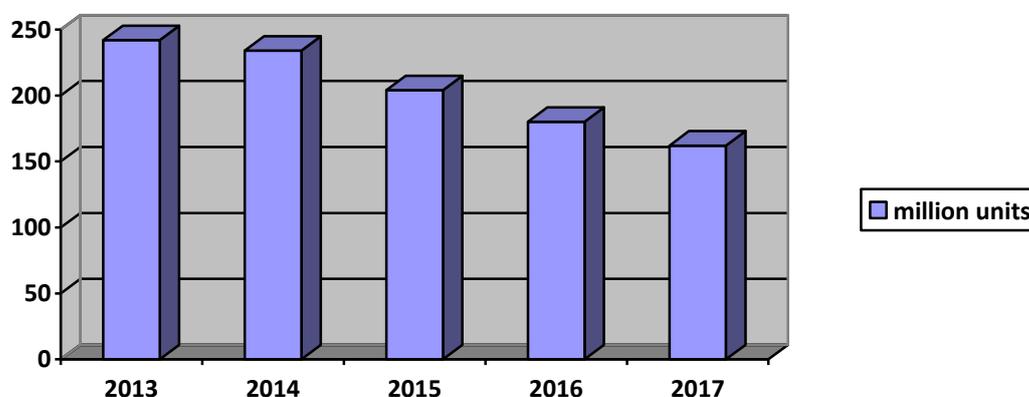
The sales drop could hardly be explained purely in technological terms because the latest innovations just made even much easier to produce – and more importantly – to distribute an e-book. The boom in self-publishing has proved how low the barrier for creating and distributing e-books can be. New types of reading devices have been introduced, especially in the last ten years after the launch of Kindle e-reader in 2007. Nowadays the e-readers are

stepping back from their dominant position facing the strong competition by the multifunctional smartphones and tablets. As the variety of reading devices became much larger, the demand of e-books was expected to increase as well. Therefore the crisis of the e-readers sales in the last few years could not explain the e-books sales drop, simply because other devices meet the customer need for reading device. The connection between the decline of the e-book sales and the falling e-readers use rate requires dedicated researches. The explanation of e-books sales drop could also be sought in pricing related factors. Another reason for the drop could be the increasing volume and the variety of cheap or free of charge digital content legally available on the Internet. The pirate consumption of e-books hurts the regulated sales of e-books as well.

The e-book market trends could not be reflected by completely consistent measurements across territories. Nevertheless, the statistical data serving the purpose of this article could be comparable between the examined markets in the United States, the United Kingdom, Germany, and France.

The negative e-book market trend in the United States is marked by a drop in fourth consecutive year of the e-books unit sales, going down from 242 million in 2013 to 162 million in 2017. Over the same period the print book market grew from 620 to 687 million copies sold (Milliot, 2018). Comparing the first half of the year since 2014, the e-book revenue share in the trade categories (fiction, non-fiction and religious) dropped from 26% to 17% in 2017 (Hoffelder, 2017).

Table 1: E-book market decline in the United States in the last five years. (Source: Nielsen BookScan and PubTrack Digital)



According to the Association of American Publishers the e-book sales revenue in the trade categories has continuously dropped in the last four years: 1.6 bUSD in 2014, 1.4 bUSD in 2015, 1.16 bUSD in 2016, and 1.10 bUSD in 2017 (“Book Publisher Revenue Up”, 2018).

The e-book sales revenue decline in the United Kingdom started in 2014 and kept a negative trend for three years in a row. The e-book sales decreased by 4.5% over the period of 2014–2016, falling from 563 to 538 mGBP (“UK Publishing”, 2017). The consumer e-books (fiction, non-fiction and children’s books) fell by 17% in 2016 coming down to 204 mGBP (Sweney, 2017). For the same period the physical book sales revenue grew from the bottom level of 2.9 bGBP in 2014 to 3.4 bGBP in 2016 (“Physical Book Market Value”, 2018). In terms of volume the e-book consumption (both paid and freely accessed) decreased from 83 million in 2016 to 77 million copies in 2017 (Online Copyright Infringement Tracker, 2017).

In Germany the e-book market share (excluding school books and reference books) has doubled from 2.4% in 2012 to 4.3% in 2014, but has stayed at almost the same level with 4.5% in 2015 and 4.6% in both 2016 and 2017 (“Economic Figures”, 2016) For the first time the e-book revenue decreased in 2017, namely by 1.4%, although the e-book market grew in volume and reached 29.1 million copies sold (“Das E-Book 2017”, 2018) .

The sales revenue of the digital books in France (both e-books and audiobooks) has more than tripled from 56.8 mEUR in 2011 to 180.5 mEUR in 2015 (Statistiques, 2017). The publishers’ revenue from e-book sales in 2016 has grown by 30% compared to 2015 and reached 234 mEUR. The share of the e-book sales from the total book market in France in 2016 was 8.6% (“Les chiffres”, 2018).

Even not fully consistent, the e-books market performance data outlines the following conclusions: the decline in the United States and the United Kingdom became a trend in the last four years; the e-book market in Germany declined for the first time in 2017; the French digital book market keeps growing.

Sustainability of the reading habits

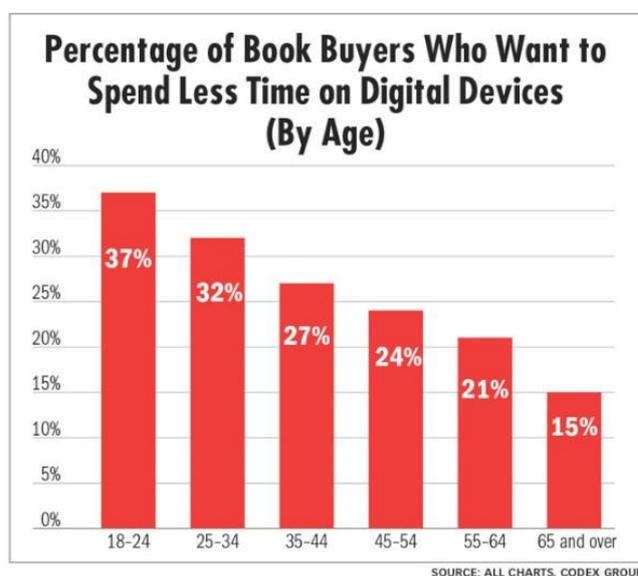
Many studies have targeted the advantages and the disadvantages of e-reading. Compared to the centuries of experience in print books reading the latest twenty years of e-books reading represent a very short period. Hence no conclusions on this relatively new media phenomenon could be based on long-time scientific examination. The dynamic technological development,

especially in the use of e-reading devices, narrows the time span of the researches on their impact on the reading habits.

The new technological set up of e-reading could be considered as one of the factors for the e-books sales decline. The disputable question is: are the e-books sales declining because of the increasing variety of reading devices or despite of it. The answer needs the verification of the hypothesis about the “digital fatigue” negative impact on the e-books sales trend.

The Codex Group survey on the US e-book market identified two main reasons for the e-books sales decline: the limitations of e-reading devices and the “digital fatigue”. The Codex president Peter Hildick-Smith formulated the problem: “The current range of e-book reading devices - including smartphones, tablets, and dedicated e-readers – has not delivered the quality long-form reading experience needed to supplant print, even with e-books’ major price and convenience advantages”. The Codex Group survey discovered that the “digital fatigue” was highest among young adults and lowest among elder people. The percentage of those who want to spend less time on digital devices was 35% in 18-24 age segment and only 15% in 65 and over age group (Milliot, 2016).

Table 2: The “digital fatigue” specified by age group. (Source: Codex Group)



Recently, Forbes magazine has also identified the “digital fatigue” as one of the reasons for the fall of e-book sales together with the price increase and the cheap content from elsewhere (Duffer, 2016).

One of the subjects of the studies on reading practices is the effectiveness of reading. This is a very relevant issue in the field of education for two reasons: the large share of the academic e-books and the essence of the academic reading which requires concrete knowledge achievements.

A research conducted in two primary schools in Norway proved the lower effectiveness of reading on screen compared to the reading on paper. The research team had formulated the following conclusion: “The results of this study indicate that reading linear narrative and expository texts on a computer screen leads to poorer reading comprehension than reading the same texts on paper. If texts are longer than a page, scrolling and the lack of spatiotemporal markers of the digital texts to aid memory and reading comprehension might impede reading performance.” (Mangen, Walgermo and Brønnick, 2013)

The reading habits turned out to be very sustainable and therefore the preferences in the traditional print book format remained solid even after the time of the booming e-book sales.

A survey published by the Intellectual Property Office of the British Government discovered that the share of British people who have read an e-book increased very little from 19% in 2012 to 20% in 2017 (Online Copyright Infringement Tracker, 2017).

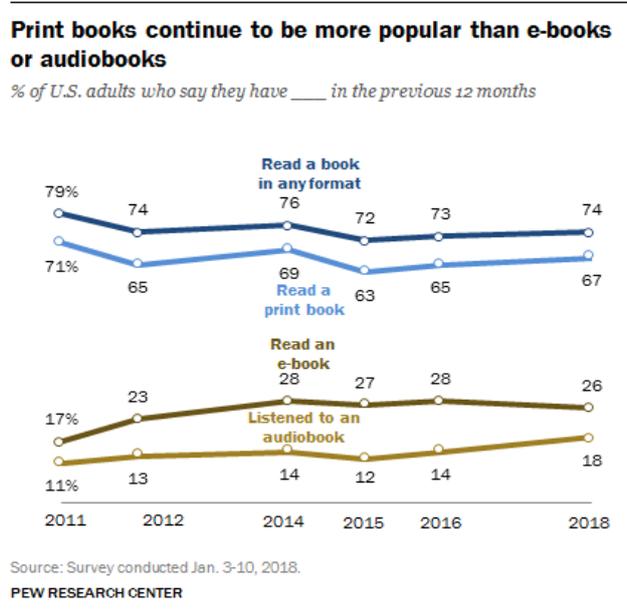
The percentage of French people who have read partially or in total an e-book has increased from 18% in 2014 to 21% in 2015, but came down to 20% in 2016. In 2017 21% have read an e-book, 7% considered to do it, but 72% stated they don't intend to start reading e-books. The share of the e-book readers dropped to 20% in 2018 (7° Baromètre, 2017).

In Germany the number of people reading e-books was steadily decreasing in the last three years: 3.9 million in 2015, 3.8 million in 2016, and 3.5 million in 2017 (“Das E-Book 2017”, 2018). The intent level of non-users who plan to start reading e-books went up from 27% in 2013 to 35% in 2015, but came down to 29% in 2017 (“Would you consider reading”, 2017).. In the end of 2016 a survey found strong preference in the print books in Germany: 51% state they will buy them exclusively or predominately, while only 14% have the same intent regarding e-books (“E-books Future Usage”, 2016).

The share of the Americans who read print books has practically plateaued, moving with slight deviations from 65% in 2012 to 67% in the beginning of 2018. The share of those who have read an e-book was changing with small deviations: 23% in 2012, picking with 28% in 2014 and 2016, but falling to 26% in 2017 (Perrin, 2018). According to a 2017 survey in the

USA 88% of the respondents (18+) claim to “love the print book” and 60% state the preference in buying print books (“Consumer attitudes”, 2017).

Table 3: Consumption of print and digital books in the US. (Source: Pew Research Center)



Specific Readers’ Preferences

Often the analysis of the reading habits does not go beyond the readers’ choice between the print and the electronic book formats. The exploration of the specific e-book readers’ attitudes requires further specification of their preferences. Such could be the preferences in reading device, way of access, price level, the preferred dissemination platform, publisher, and – of course – the type of content. The next part of the article is dedicated to content related preferences, which could reveal the suitability to the various genres to the e-book format.

A cross-country survey on 10 large book markets proved the suitability of leisure reading to the e-book format. The mystery and thriller novels were the most read genre in five markets. The survey identified the mystery/thriller as the most popular genre among the e-book readers in the United States. It is read by 50% of the e-book consumers, followed by science-fiction with 36% and romance with 34% (“Digital Media”, 2016).

Fiction has continuously been the second largest product category on the digital book market in the United Kingdom as the first position has firmly belonged to the academic/professional e-books. In 2016 the fiction e-books had 31% share (165 mGBP) of the total British digital book sales revenue (“Digital Book Sales”, 2016). The mystery and thriller e-books are very

popular in the United Kingdom as well - 58% of the e-book consumers in the United Kingdom read this type of novels (“Digital Media”, 2016).

The genre preference is very similar in France. A survey from the beginning of 2017 identified the three most read types of novels: classics – 34%, crime – 31% science fiction and horror – 23%. Among all categories fiction is on the top with 61% of e-book readers (“7° Baromètre”, 2017).

In Germany the largest share of the e-book market over the period of 2013-2016 belongs to the fiction category with more than 80% in each year (“Books and the Book Trade”, 2017).

The quoted surveys and data support the conclusion about the strong presence of fiction in e-book publishing. The leisure genres have got a predominance, which is best presented by the mystery/thriller genre.

The academic and professional literature is another genre which proved to be suitable for e-reading for various reasons. The electronic format allows targeted search, fast access and possibility to reach a lot of reading material in a short period of time. E-reading gives also the possibility to source large amount of texts by picking up selected parts of them.

The digital academic and professional books have sustainably grown in sales revenue. Compared to 2009, the e-book revenue of these types of editions has almost tripled from 107 to 277 mGBP in 2016. The e-book share in this category has also grown within this period from 11% to 24% (“Publisher Sales”, 2017). The academic and professional titles have got the largest 52% share of the total digital book sales revenue in the United Kingdom in 2016 (“Digital Book Sales”, 2018).

In 2016 the academic and professional category on the French book market was the one with the largest revenue share generated by e-books – 42% (“7° Baromètre”, 2017).

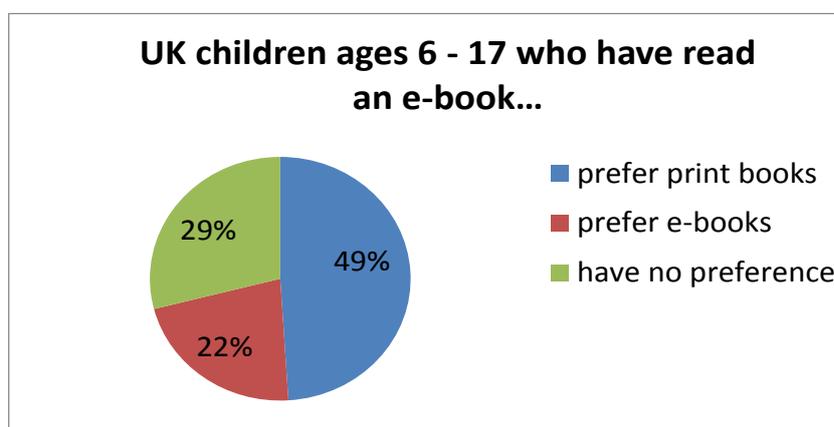
While the fiction and academic/professional categories are the examples for high content suitability to e-book format, the e-books for children and young adults have poor market performance.

The reading habits of children in the United States show a preference for the traditional print books. According to a survey of BookScan/ PubTrack Digital the e-books share in sold copies was 11% for juvenile fiction and 2% only for juvenile non-fiction (“Year in Books Review 2015”, 2016). The drop of the e-book sales on the US market in 2015 vs 2014 was pretty

differentiated in age terms: 9.5% within adult e-books, but 43.3% within children's and young adult e-books ("AAP StatShot", 2016). The low popularity of the e-book format among children and their parents is clearly reflected by a bi-annual survey conducted in the United States. Consistently with 2014, 65% of the respondent children ages 6-17% in the United States declared in 2016 their preference in print books even though there are e-books available. It is interesting to note that 45% of the children in that age segment who have read an e-book still prefer to read print books and only 16% of them would prefer e-books ("What Parents and Kids Want", 2017).

The same type of survey conducted in the summer of 2015 found very similar reading attitude in the United Kingdom, where 68% of children stated they will always want to read print books. Almost half of the respondents' ages 6-17 (43%) have read an e-book, but 49% of them confirmed preference in print books versus 28% who prefer e-books. The role of the parents is reflected by the fact that about two in three parents (67%) of kids ages 6-11 prefer that their children read in print ("Kids and Family Reading Report", 2015). Having in mind these reading attitudes it is not a surprise that the share of children's e-books of the total e-books revenue in the United Kingdom in 2016 was only 2% ("Digital Book Sales", 2018).

Table 4: Preferences of the British children who have read an e-book. (Source: Scholastic/YouGov)



The digital format has not showed big potential on the market for small children in Germany

either. A recent survey discovered that 72% of the children between 4 and 13 years old read print books (Kinder-Medien-Studie, 2017).

The children's literature share of the German e-book market has always been measured by one digit figure, the highest being 8% in 2016 ("Stabil im Wandel Der Buchmarkt", 2017).

In France the e-book format has also performed poorly among children and young adults. In 2017 only 10% of the e-book consumers have read titles from this category. Another example is the negligible 1.5% share of the electronic textbooks of the total revenue from this product category on the French market ("7° Baromètre", 2017).

Conclusion

The innovations in digital publishing have built up the expectations for permanent increase of the e-book consumption. However, the sales data from the four large markets examined here reveals a much more complicated consumption curve of the e-books.

The reading habits and the e-book market performance are linked in a constant mutual dependence.

The book market reality proves the simultaneous evolution of both print and electronic formats.

The recent e-book sales data confirmed the negative trends on the two largest English-speaking markets. Although still slightly growing in copies sold, the German e-book market experienced its first decline in sales revenue in 2017.

The analysis of reading habits reveals high sustainability of the preference in the traditional reading of print books. Regardless the early involvement in communication and entertainment activities on screen the children's segment proved to have a clear preference in the print book format.

The fiction and the academic/professional categories turned out to be the most successful e-book categories. The leisure reading, especially the mystery/thriller novels, has got the largest share among the genres published in electronic format. The academic/professional e-books has also got high popularity for various practical reasons such as affordable price, fast access, targeted reading, and easy search.

Usually the print and the electronic formats are examined as alternative readers' choice. The more developed an e-book market is, the stronger is the product differentiation within the whole e-book publishing.

The type of content and the specific reading preferences have a considerable impact of the market performance of the e-books. Similarly to the traditional print book market, the differentiation in strong and weak product categories seems to be an integrated process in the development of every e-book market. The suitability of the content to the e-book format will most probably become an important and large area for further research.

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