

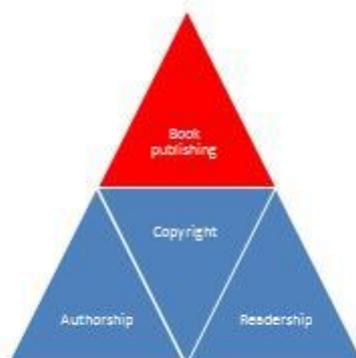
Introduction to Turning the Page (Routledge, 2014)

By Angus Phillips

This is an exciting period for the book, a time of innovation, experimentation, and change. It is also a time of considerable fear within the book industry as it adjusts to changes in how books are created and consumed. The movement to digital has been taking place for some time, but with consumer books experiencing the transition, the effects of digitization can be clearly seen to everybody.

This book does not attempt to cover the form and functions of the publishing industry. I do that elsewhere in a separate volume.ⁱ Instead the aim is to analyse the fundamental drivers of the book publishing industry, and to examine the effects of digital and other developments on the book itself. The three drivers I identify are authorship, readership, and copyright, on which the world of book publishing depends. Books need authors and readers, and the business of books relies on a regime in which intellectual property can be exploited and protected.

Key drivers



The perspective I am taking is from the field of publishing studies, and given its interdisciplinary nature, I have drawn on theory and research from a range of subjects from business and sociology to neuroscience and psychology. Since other media have experienced digital transformations ahead of the book, I have investigated what has been happening in the areas of music and newspapers. In addition to drawing on my own observations of the book industry worldwide, I have conducted a series of interviews with industry professionals, from authors to digital publishers. Although my viewpoint is of the book internationally, inevitably there is a bias towards my own direct experience of the UK market for books.

Digital tide

The volume's focus is on trade - or consumer - publishing, the area in which the coming of digital is being felt most at the moment. In particular, there has been a marked movement towards ebooks in adult fiction. If you take the areas of journals or professional publishing, the transition to digital has largely been made, and the area of educational publishing is much affected by government policy. The field of digital publishing is fast moving and there would be little point for this book to attempt analysis of the latest publishing start-up or the monthly statistics around ebook sales. In the US market, the most developed for ebooks, whilst the *pace* of growth appeared by 2013 to be slowing, ebooks had made deep inroads into parts of the market, most prominently fiction.

I have likened the impact of digital on the world of publishing to the tide coming in, up a beach.ⁱⁱ

There are islands of sand which remain unaffected, but gradually the water washes into every area.

There are parts of the world where print remains the dominant medium but as the internet and mobile technology spread ever further, the water continues to rise. It may be construction workers

reading on mobile phones in China, children learning on tablet computers in Turkey, or commuters using their dedicated ereaders on the Metro in Russia.

The whole debate over print vs. digital is over. Reading on screen is here and the arrival of mobile devices and ereaders means it is happening all around us – on the train, at the bus stop, and on the beach. The transition to digital also means that we can move on from the discussion of the death of the book – the shape of the argument was that the book would disappear in the face of an onslaught from a range of visual media competing for our attention.ⁱⁱⁱ The book is evolving in the digital environment, experimentation is taking place, and perhaps to the surprise of some, it is still with us. We can now start to look at how the book is developing and how it might change in the future.

If the book was becoming an irrelevance, it is also surprising how it has attracted the attention of the large technology players, from Google attracted by its quality content to Apple, whose co-founder originally declared the book of no interest whatsoever. One of the biggest players on the internet, Amazon, started its business in the area of books and went on to develop an ereader which cracked open the market for reading on screen for pleasure rather than simply for work. The low marginal cost of an ebook should in theory make publishing more profitable, especially if the market can be expanded, as income rises above the fixed costs. However, lower entry costs mean that traditional publishing houses face competition from self-publishing by authors, literary agents publishing their authors' backlists, publishing start-ups, and booksellers such as Amazon with their own publishing operations. There is disruption to the economy of the book from the content, often user-generated, available online. All this is against a backdrop of falling print sales in some markets. Further, as the act of copying loses value, the expectation of users is that books should be inexpensive or even free.

We have a whole new range of terminology around the book, brought about by digital developments. For the simple conversion of a printed text, we can talk about the *vanilla* ebook, and we have both *enhanced* ebooks (with the addition of audio and video) and *born digital* books - new products developed specifically for devices such as the iPad. For marketing reasons publishers may still call these products books, but traditional routes of production are being left behind. The printed book has had to step gracefully aside and allow itself to be called the pbook.

Reading is taking place across a host of devices from the PC to mobile phones and dedicated readers such as the Kindle or Nook. It is possible to carry on reading a book from the same place in the text, having switched from your ereader to your phone. Meanwhile print is not going away, and offers the advantages of a tactile experience, ready ownership, an object of pride, and a store of memories.

For writers there are more avenues than ever before through which to make their work available, with the opportunity to experiment openly and receive feedback from readers. Anyone can now publish a book in print, online, or as an ebook, and sell their work direct. The world of authorship is now more democratic but with an oversupply of titles, the chances of bestsellerdom are slim.

The big themes

Some large themes dominate the discussion of the evolution of the book, and how these play out form the backdrop to the analysis. They impact in significant ways on the key drivers of authorship, readership, and copyright examined in the first three chapters.

Firstly, *disintermediation*, with the arrival of digital production and distribution enabling the bypassing of traditional players in the value chain of publishing and the arrival of new ones. Do authors need publishers? Do readers need physical bookshops? Author can talk direct to reader, publisher direct to consumer, technology company direct to user. The old patterns of content creation and distribution are being worn away, and much experimentation is taking place. J. K. Rowling is selling her ebooks direct to her readers, Amazon has its own publishing operation, and readers are investing directly in the production of new titles.

Secondly *globalization* – with the arrival of ebooks, a reader the other side of the world does not have to wait for a book to be printed and distributed, or translated. They can download the book on first publication and have immediate access. This is a tremendous opportunity for books and knowledge to spread in new ways, across new networks. Countries without a developed infrastructure for the distribution of physical books can access content directly. But does the arrival of ebooks signal an even greater dominance for books published in the English language?

Thirdly *convergence*, which takes many forms. This includes the presence of many types of media on the same mobile device, where the book has to compete directly with games, newspapers, the web, and social media. This brings opportunities but also considerable risk for the book's future. There is also convergence of people's tastes around the latest cross-media franchise, of which books remain a key part; and convergence in the minds of users, who will be less able to differentiate categories of media, and will be making connections between content in new ways.

Lastly *discoverability* – how on earth will readers come to find books? An author can self-publish their work, a publisher can put their book on Amazon, a book app can be posted on iTunes – but

how does anybody know it is there? If the high street bookshop or public library is to disappear, the serendipitous browsing of new and backlist titles will be a thing of the past, to be replaced by what? This has yet to be determined – will it be social media which provides the answer, or highly targeted advertising based on our reading habits?

The book itself

What will happen to the book itself? The advocates of containerization maintain that the book is simply an outmoded vessel for content. It should be broken up, just as has happened to the music album, and in doing so this will bring down the publishing houses which want to retain control. The book is a container of content, ripe for being distributed and sold as separate chapters or in whatever form makes sense. This will facilitate a standardized, low price – or even the content becomes freely available - whilst the job of assembly can switch to new curators of content. Users themselves can create personalized selections, collections, and mixed-media works. Books no longer need be square, rectangular, with boundaries; they can be any format or length, free of the restrictions imposed by print. Already we can see a return to shorter forms of writing, such as short stories and novellas, and serialized fiction which responds almost in real time to the market.

I have taken as a subtitle, 'The evolution of the book', because what I can see is not a dramatic tearing-up of the old forms of the book. The most successful form of the book in the digital world has so far been the vanilla ebook – the economic model works, just about, and this is because it replicates, now with some advantages, how the printed book operates. You can create an all-singing, all-dancing book, but most such projects have lost money against high production costs. They have also brought the book into direct competition with products from gaming and other media companies, which have big pockets and limited product lines.

The book can become larger or smaller, faster to market, expand its horizons to encompass multimedia, or content itself with linear text which stimulates thought and imagination. There is no one set path, and there are different branches to be explored as the book evolves.

ⁱ Giles Clark and Angus Phillips, *Inside Book Publishing*, 5th edition, Routledge, 2014.

ⁱⁱ Angus Phillips, 'The Digital Tide in Europe', paper given at the World Book Summit, Ljubljana, Slovenia, 31 March 2011.

ⁱⁱⁱ See, for example, Angus Phillips, 'Does the Book have a Future?', in Simon Eliot and Jonathan Rose, *A Companion to the History of the Book*, Blackwell, 2007.