



2018 Year-in-Review: Global Industry Trends

Featuring (in order of appearance)

- **Rüdiger Wischenbart, Content Consulting**
- **Porter Anderson, editor-in-chief, Publishing Perspectives**
- **Nitasha Devasar, president, Association of Indian Publishers**
 - **Susan Spilka, Workplace Equity Project**
 - **Simone Taylor, Workplace Equity Project**

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KENNEALLY: When Steve Jobs introduced the iPad in 2010, the pundits and the journalists were ready to declare the death of print. Over the years since, we have watched the rise of e-books; the pressure on print; and even the surprising plot twist that many readers, including young ones, continued to prefer physical books over their virtual counterparts.

Welcome to Copyright Clearance Center's podcast series. I'm Christopher Kenneally for Beyond the Book, looking back at the last twelve months of our programs. In this edition of our three-part review for 2018, we look at ways that globalization is shaping publishing as a business and a profession.

From Vienna, industry analyst Rüdiger Wischenbart recently shared highlights from his latest report, *eBook 2018: Phase 02*. In data he has gathered about consumers' relationship with digital publishing across Europe, North America and Asia, Wischenbart sees the curtain about to rise on the second act in the e-book play.

WISCHENBART: It's so funny to see that even Steve Jobs, the big innovator, when he innovated the iPad didn't anticipate what he would do next with the iPod and with the iPhone. Because it was the iPhone which kicked off all that smartphone revolution where we are in. One of the consequences for books is suddenly we realize that not even the book is a holy grail. Suddenly, people take in the stories by listening to the stories, and they don't just listen to them from the iPhone or the smartphone. Now they have Alexa speakers and other smart speakers in their living room read to them and reading books for them.



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At the same time, we have all that tremendous debate around storytelling in new formats with new TV-like companies like Netflix or Amazon Studios. So we see that we have to reframe constantly in that transformation where no point of reference is really a secure point of reference. We go from reading to listening to watching.

Being tremendously conservative in my understanding of that transformations are radical and stick to certain rules at the same time, I don't expect that reading is going away. Not at all. But I see that there are different things that can coincide, and that's what I want to make the key point of reference of my observations.

It's not just one kind of object. It's different objects or different ways, even, by listening and watching. It's not one channel but many channels around. Also, the chatting about books occurs on social media between friends, in traditional media, anywhere. And we have also a multiplication of business models. Subscriptions suddenly bring books on par with what music has become. We listen to a continuous flow of music from subscription services. We saw quite a few initiatives applying that to books that have failed. But still, suddenly we see for some books, that works, and it finds an audience which is convinced that it's more convenient just to pay a flat fee every month and that's it.

I don't think that one will kill the other, but I strongly believe, as in the other media environment, that what we really see is segmentation and specialization, where different modes and formats and different ways of distribution and different business models can coexist and will find very specialized target audiences who prefer one or the other.

KENNEALLY: Book markets around the world have much in common, from the challenges of online commerce to bestseller lists dominated by authors with internationally recognized brands. As Rudiger Wischenbart observed, digital reading is concerned not just with books or even audiobook, but with storytelling. That brings books in whatever format into direct competition with other screen media. Porter Anderson, editor-in-chief of Publishing Perspectives, discussed why this worries him on a panel at BookExpo last spring. Book-centered storytelling, he said, is in grave danger.

ANDERSON: It is. It's under attack. I've been going through some conversations with the English author Jeff Norton, who has found himself making a great deal of television, although he's a very fine writer. He first formulated what I think we're all now starting to develop pretty clearly for ourself, the idea that the primacy of storytelling is shifting. It may no longer lie with publishers. It used to be everything started with the book, and whether the film was good or bad, you came out wanting the book, right?



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Now, we have such fine, high-quality television coming through from Amazon Studios, Netflix, Hulu, HBO, all of them, that you get a very satisfying experience from just seeing a piece that was developed originally for television, that stays on television. No longer do you come out saying I must have the book. I'm referring, for example, to *Marseille*, a fantastic series that was made by Netflix in France. They're working in other countries in original languages, and then they bring them into us, which I also think is fantastic.

However, that means that the storytelling lead shifted to another medium. And what in publishing we have to keep remembering now is that our readership is someone else's viewership and is someone else's listenership, someone else's rockers for music, someone else's gamers, someone else's video addict. All of these things are not only competing on the same device, but they are actually changing what publishing is going to have to do to remain with its hold on storytelling.

I'll give you one example. Amazon Publishing, the traditional – perhaps not so traditional, but the trade house with 15 imprints – is a very powerful force now. Its 15th imprint is called Topple Books. Topple is also the name of Topple Productions, which is the filmmaker Jill Soloway's production company. What they've done is created a book imprint called Topple to match her production company called Topple. She was an executive producer of *Six Feet Under*. She's the one behind *Transparent*. She's winning many awards through Amazon Studios. She has eight series in development with them now and four features.

What they're going to do is develop projects together so that there is a publishing imprint working with the filmmaking imprint in tandem together to create projects that can go in many other directions. This, I think, is where storytelling is headed. And I think that publishers need to think about, how can we find liaisons? How can we find collaborative opportunities for ourselves with these other entertainment media? Because we may lose the storytelling mantle.

KENNEALLY: With thousands of publishers working in dozens of languages, India is the seventh-largest book publishing nation on Earth. The English-language book market alone is the world's second largest, after the US. The Association of Publishers in India considers books to be essential to India's future, as resources for educational ambitions and as outlets for creative expression. Nitasha Devasar is API's newly elected president. At Taylor & Francis India, Devasar is managing director for India and south Asia. She is editor of *Publishers on Publishing: Inside India's Book Business*.

KENNEALLY: Nitasha, I want to ask you about the challenges that multinationals like Taylor & Francis may face when they enter the Indian market and try to grow there. Certainly, as publishing markets in the US and Europe have matured, India has looked



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like a market full of opportunity. But I imagine there are challenges that global actors face when they want to achieve these ambitions in India. Tell us about those.

DEVASAR: You know, you have to understand that there are certain enduring challenges which have existed for a long time. The Indian market, for example, is very segmented because of the size of the country, the size of the subcontinent. It's highly price-sensitive. There are also regional variations, so one size does not fit all. The positive side of that is, of course, which means both print and digital can survive simultaneously. Smaller players, medium-size, and big players can all be there. But the downside is that it makes it very complicated for people to come in.

KENNEALLY: India on the rise isn't a story only for the trade book market. In scholarly publishing, India ranks third in article submissions around the world and fourth in the percentage of acceptances to scholarly research publishing worldwide. Nitasha Devasar described ways that the Association of Publishers in India is working to raise standards and raise visibility for India's homegrown scientific research.

DEVASAR: The key space we are trying to operate in is to build the value proposition of Indian publishing. It's a significant part of global publishing, but somehow it hasn't got that recognition in the Indian context. India is pushing itself to be a knowledge economy. What is the role that publishing plays in that? It's a really important role that publishing plays. There's a really important role of copyright in establishing a knowledge economy.

These are the kind of issues we want to specifically – we have been working on and continue to build momentum on, and we are trying to do this by partnering with key stakeholders for creating awareness around copyright. So one of the things we do individually and as groups is publishing ethics and copyright workshops. We do them in universities. We do them for early-career researchers. We have librarian workshops to discuss publishing ethics.

KENNEALLY: As 2018 opened, the Workplace Equity Project released its survey to capture and analyze data on diversity and equity-related issues in scholarly publishing across the globe. At that time, WE Project organizer Susan Spilka outlined for me her expectations for the survey.

SPIILKA: Our industry is known to have a majority female workforce, male-dominated leadership, and a striking lack of ethnic diversity. Studies show that around 60% of the workforce is female, over 85% is white, and 60% of the leadership is male. I think the WE survey is going to find that the imbalances persist. We hope to gain some insight into why and identify some of what's reinforcing the status quo. That said, we truly believe that our industry leaders want to change that equation. Change has to come from the top and from within – that's how WE fits in.



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KENNEALLY: In the fall, the Workplace Equity Project reported on the survey's findings. Among other finds, they described a gap between an organizational policy that affirms respect for diversity, and the actual practice in the office and by management. Simone Taylor, a co-founder of the Workplace Equity Project, told me that staff members don't live the policy – they live the experience. Sometimes those experiences are shaped by individuals who may not be in line with the policy.

TAYLOR: Yes. That was a distinctly recurring theme that came through the survey. We gave people an opportunity, in addition to being able to tick yes or no or answer questions, we had what we termed freeform comments, where we allowed people to just add anything else they needed to say. And a recurring theme in many of these comments was that irrespective of organizational policies, what people experienced, as you just said, depended on their line manager's interpretation of that policy.

That, I think, presents a very interesting challenge to an organization. What is clear is that setting the policy is one thing, and we know that there have been quite a few initiatives in the industry to address work/life balance issues, to address promotion and compensation. But if your own line manager doesn't understand or doesn't interpret these things in the way the company intends, then your own experience is very, very different from others around you. And it's a challenge for the industry, because your managers are the people who you have entrusted with the values of the organization, and it presents an opportunity to maybe have a better discourse with managers, better training, improved oversight. I don't know, I think there's a lot we can do around – to improve this and attempt to make the experience more uniform.

Similarly, mentoring and advocacy was something that we felt could be improved. The industry has done a great deal. But I think to make a really positive change, we need to go beyond mentoring to actual sponsorship and advocacy, which is what I think makes a significant difference in a professional career, especially people looking to move into more responsible leadership roles. It really helps where you have somebody actually advocating for you to move forward.

KENNEALLY: Over many generations, books and scholarly journals have fostered a global culture of excellence in science and the arts. Publishing today continues to push out its boundaries – reaching new markets; incorporating new technologies; and welcoming new individuals and communities to its ranks.

I'm Christopher Kenneally, looking back at 2018 for Copyright Clearance Center's Beyond the Book. Our co-producer and recording engineer is Jeremy Brieske of Burst Marketing.



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