

DOES THE RISE OF THE INTERNET MEAN THE DECLINE OF PRINT BOOKS?

Nozima Muratova,
Journalism and Mass Communications University of Uzbekistan
Marina Sheresheva,
Lomonosov Moscow State University
Ekaterina Buzulukova,
Lomonosov Moscow State University
Lilia Valitova,
Lomonosov Moscow State University

Abstract: Recent changes in the book publishing market are partly contrary to some earlier forecasts. New trends that no one could have predicted are emerging instead of those that seemed highly sustainable not long ago. The present paper aims to unveil deep shifts in the structure of book publishing and sales, new patterns of consumer preferences with special attention to the Russian book market specifics. We analyzed both secondary data obtained from open sources, government documents and officially published reports, and primary data collected through interviews and survey, to have a more comprehensive picture. The results confirm that the development of the Russian book publishing market is consistent with the global trends, though with its own peculiarities significant for publishing companies and their production plans. Thus, while electronic and hardcopy books cost approximately the same in the developed countries, in Russia e-books are 30-40% cheaper. Another specific feature is that foreign authors occupy the majority of popularity ratings. At the same time, the current "fight for customers" between e-book and paper book production is more of a long-term phenomenon, and we should not expect a dramatic shift in book type preferences for consumers in the nearest future..

Keywords: publishing market; digitalization; pandemic; consumer behavior; Russia

1. Introduction

The SARS-CoV-2 pandemic has had a deeply negative impact on the publishing industry. One of the direct consequences is the evident decline of paper books publishing in volume and value (Antonov-Ovseenko 2021; Russian book market 2021). Moreover, recent changes in the book publishing market are partly contrary to the previous forecasts. Trends that until recently seemed stable are collapsing and are being replaced by new ones, the emergence of which even experienced market operators failed to predict. Profound changes are taking place in the very structure of book publishing and sales; the directions and volumes of cash flows are changing as well.

At the same time, the pandemic has merely served as a catalyst for some global trends in the book publishing market that started taking shape much earlier. The most significant of those trends is digitalization (expanding the presence of e-books and

Citation:

Muratova, Nozima; Sheresheva, Marina; Buzulukova, Ekaterina; Valitova, Lilia. 2024.

Does the Rise of the Internet Mean the Decline of Print Books?

International Journal of Media and Communications in Central Asia. 4: 39-59.

audio books): over the past twenty-five years, digital media platforms have undeniably transformed book culture (Murray 2018; Parmentier 2021). With digitization, new opportunities and threats have emerged for publishing firms (Waldfogel 2017; Steiner 2018; Clark and Phillips 2019; Reimers and Waldfogel 2021). Many researchers share the opinion that traditional media, including book publishing, are facing a real revolution in terms of relocation to digital platforms (Rabot and Chartier 2020). This represents a substantial uncertainty for the publishers, who are moving step-by-step into the new digital era and whose exploration of new market opportunities and alternative business models remains anchored in traditional and analogue business models (Øiestad and Bugge 2014). The more digitalization of the world is spreading and becomes more democratic in various mobile and convergent interfaces, the more screen plays a key role in our lives. The electronic books was one of the first sector that was affected by the digital revolution and has changed the traditional publishing industry (Le Ray 2021).

Among the potential advantages of e-books is that they are easily accessible and interactive for beginner readers who cannot yet decode text or are just beginning to learn to decode (López-Escribano et al. 2021). Other advantages are portability, taken physical space, regulated font size, built-in dictionary, opportunity to take notes, convenience to share, and environmental protection. The shift from analogue to digital challenges drives firms to re-examine their product portfolios, core competences, and existing business models to gain success in new market environments (Sadq et al. 2018; Yucesoy et al. 2018). Øiestad and Bugge (2014) show that Norwegian publishing industry has come relatively far in developing industry standards and joint distribution systems, but the functionality and user experience of digital products is still poor, prices are high, and the share of Norwegian language digital titles is low. Magadán-Díaz and Rivas-García (2018) come to the same conclusion concerning digitization and business models in the Spanish publishing industry. They underline those digital products / services are still considered secondary to the paper book.

Labrousse and Lapointe (2021) point out that while the e-book is one of the challenges that the book world has been facing for several years, the overall market share of the e-format remains small; few people say they read e-copies and many criticize them. Relative success of the e-book is far below what could have been predicted earlier, especially when comparing the book market situation with other industries, such as listening to music” (Labrousse, and Lapointe 2021).

An analysis of pricing models in distribution channels of paper books and e-books shows that the publishers and bookstores

have great potential for profit improvement (Lu et al. 2018). Taking into account that current institutions in many countries contribute to preserving print publishing the prospects of paper books market are not fully negative (Øiestad and Bugge 2014). There have been a lot of studies comparing the effects of paper books and e-books reading that shows not big differences in reading comprehension even between youngers learners' (Lim et al. 2021). Most students prefer to use paper books because they give them unique experience (the emotional attachments, connection to identity, social rituals, and ease of use) (Spirahayu and Premananto 2020). These facts mean that even in the segment of a young audience, the superiority of e-books is not so unambiguous.

One can admit that the ill-concealed admiration for the "digital revolution" comes together with doubts about whether the hard-copy form can maintain its dominant position in competition with the digital form. Does the rise of the Internet really mean the decline of print book publishing? There is no clear answer yet. In addition, while most published research typically focuses on the book market issues in developed countries, the relevant literature on emerging economies, including Russia, is scarce.

The current study aims to fill this gap by analyzing the state of affairs in the Russian book publishing market, and to put the picture of this particular market in a broader context of the world trends, including the new factors that became important in 2020, due to the SARS-CoV-2 pandemic. To be more precise the goal is to unveil deep shifts in the structure of book publishing and sales, and new patterns of consumer preferences. To reach the goal, we should analyze previous studies and current trends in the publishing market and conduct research of the Russian readers preferences and behavioral patterns. Comparing whose features with world trends, we can identify peculiarities of the Russian market and answer the research question.

2. Materials and Methods

We analyzed both secondary data taken from open sources, government documents and officially published reports, and primary data collected through interviews and survey, to have a more comprehensive picture.

To obtain empirical data, we used a combination of qualitative and quantitative methods. The information collected by means of desk research was taken from reports of Russian Book Union, Federal Agency for Press and Mass Communications of the Russian Federation, Ministry of Digital Development, Communications and Mass Media of the Russian Federation, leading newspapers. We analyzed with the help of content analysis the published interviews of leaders of Russian book market: head of

Litres (the leader with 70% share of e-book market) Sergey Anuriev, the head of the Association of Internet Publishers Vladimir Kharitonov, head of the Association of the Internet copyright protection Maxim Ryabyko, literary critic editor-in-chief of the Storytel platform Konstantin Milchin, I, Commercial Director of Ozon.ru (the largest Russian electronic sales platform) Ivan Melnikov. Interviews revealed main tendencies in readers recent behavior, their preferences and gave us understanding of possible future trends in the market during the pandemic period. The field quantitative research allowed us to assess the book readers' attitudes to different topics, thematic and platform preferences of Russian consumers as well as their attitudes and intention to buy. The main research hypothesis is that the Russian book publishing and sales market along with common world tendencies has its own uniqueness and peculiarities.

The research hypothesis of the field quantitative research is:

H1: Despite the availability of books in electronic format, people prefer to buy paper books.

To prove the hypothesis, we conducted an online survey in January-March of 2022 (N=280). The survey consisted of 28 questions organized in several sections. The first question was for filtering purposes and asked about whether the respondent had obtained at least one book in any format within last year. The following section was about preferred format, channel and genre of the purchased books. We then asked about how the respondents chose books. Following that, we inquired about certain behavioral patterns regarding purchasing books (whether they thought a book was a good present, whether they had bought used books etc.), reading practices (frequency and duration of reading sessions, reasons for reading). We also asked about preferences for monthly or annual subscriptions to e-book services and whether the respondents had bought self-published books ("samizdat" in Russian). Next, we asked whether the respondents would keep on buying the same format and quantity of books in the nearest future and finally there was a section about the respondents' profile.

3. Results

3.1. Russian book publishing market

Russia is in the top 10 most book publishing countries in the world. According to the official report of the Federal Agency for Press and Mass Communications, by 2020 Russia was in 6th place in terms of the number of published book titles (Table 1), and later moved up to 5th place in the rating (Russian book market 2021). In addition, in the ranking-2020 of the 56 largest publishing companies in the world, with an annual turnover in 2019 ex-

ceeding 150 million euros (\$200 million), there are two Russian publishing groups, namely “Prosveshcheniye” (“Enlightenment”, with 40% share of the country’s educational market) and “Eksmo-AST” ranked 49th and 43rd, respectively (Wischenbart and Fleischhacker 2020).

No	Country	Number of editions issued	Publishing industry revenue (mln. \$)
1	China	440000	n/d
2	The USA	304912	23338
3	Great Britain	18800	5438.10
4	Japan	139078	n/d
5	Italy	130376	2493.80
6	Russian Federation	115171	1297.10
7	France	106799	2981.60
8	Germany	79916	6066.60
9	Turkey	78619	1255
10	South Korea	72715	4962.70

Table 1. Position of Russia in the world book publishing market.

Source: Russian book market 2021

In Russia, as in other countries, the SARS-CoV-2 pandemic had a clearly negative impact on the book publishing industry. A direct consequence was a noticeable decrease in paper books publishing in volume and value. According to the industry report of the Ministry of Digital Development, Telecommunications and Mass Media of the Russian Federation published in 2021, the market showed an increase of 5.28% (83.97 billion rubles) in 2019, compared to the total value of book releases in 2018. In 2020, on the contrary, the total cash turnover of the industry (print + e-book) amounted to 78.19 billion rubles, i.e. 6.89% less than in 2019 (Russian book market 2021).

To compare, the French National Publishing Union (SNE) initially reported that the book market in France remained quite stable even in the face of anti-pandemic measures. “Publisher turnover in 2020 was €2,740 million, down 2.3% from 2019” (Wischenbart and Fleischhacker 2020). Taking into account the Ruble to Euro exchange rate of 86.25/1 (at the exchange rate as of Feb 3, 2022), the turnover of the French book market amounted to about 31.77 billion rubles. That is, 24.84% of the total turnover of book publishing in Russia. Therefore, it seems reasonable to assume that the smaller decline in the volume of book publishing in France in 2020 than in Russia is also due to the lower total volume of the French book publishing market.

The data of the Russian book market report issued at the

end of 2020 confirmed the dominant interest of Russian consumers in foreign authors. According to the report, for the first time in recent history of Russian book publishing, a foreign author headed the list of books published by the largest booksellers and the number of titles (Table. 2). It was Stephen King with 120 titles and more than 774 billion copies (Russian book market 2021).

№	2019	Number of titles	Total circulation, thousands of copies
1	S. King	120	774.00
2	D. Dontcova	69	525.00
3	F. Dostoevskiy	87	459.4
4	A.Sapkovsky	37	406
5	A. Marinina	45	374.5
6	A.Pushkin	68	365.6
7	E.M. Remark	49	351
8	M.Bulgakov	60	348.6
9	A. Kristi	78	338.5
10	L.M.Olkott	31	328.5

Table 2. The list of most numerously published books in Russia in 2020.

Source: Russian book market 2021

In spring 2020, the spread of SARS-CoV-2 and the related restrictions negatively impacted paper books production. Publishers expected a decline in demand for paper books due to limitations of physical contacts between people and therefore reduced production of previously planned paper editions. According to Eksmo-AST, in March-June 2020 alone, offline book retail lost at least 75% or 6.8 billion rubles monthly revenue (Lebedeva 2020).

However, after the end of the self-isolation period, the demand for paper books recovered unexpectedly quickly. Ivan Melnikov, Commercial Director of Ozon.ru, the largest Russian electronic sales platform, noted: “2020 has once again confirmed that buyers are still interested in paper books, despite the prevalence of electronic formats. Turnover from book sales on our website in 9 months of 2020 grew by 40% year-on-year - and this is despite the comparison with the high base of last year” (All-Russian Book Rating 2020).

From January to June 2021, the total volume of Russian book publishing (including both paper and electronic books), according to Eksmo-AST experts, increased to 42 billion rubles, which was 10% more than in the first half 2020 and 5% more than in the “pre-pandemic” first half 2019 (Lebedeva 2021a).

3.2. E-book publishing: types, tools, profitability

The digitalization of books has become particularly important amid the 2020-2021 pandemic crisis threatening the industry of paper book publishing. The SARS-CoV-2 pandemic and the imposed restrictions further boosted the intention of people to turn to e-copies instead of using paper books due to the closure of most bookstores.

In Russia, the electronic publishing market had expected a reasonable increase (Industry conference 2021). In 2020 e-books accounted for 22% of the Top-50 book sales (All-Russian Book Rating 2020). The representatives of the Litres group (the leader of e-book market with the 70% share) of companies released data on the increase in the revenue of their own service by 32% compared to the previous period, which amounted to 5.8 billion rubles. The subscription service demonstrated the highest growth: a 78% year-on-year increase on the MyBook platform, owned by Litres, and a 65% year-on-year increase in book distribution on the platform Litres:SelfPub. Overall, the e-book revenues have increased by 31% up to 8.5 billion rubles in 2020 compared to 2019. Take in Figure 1.

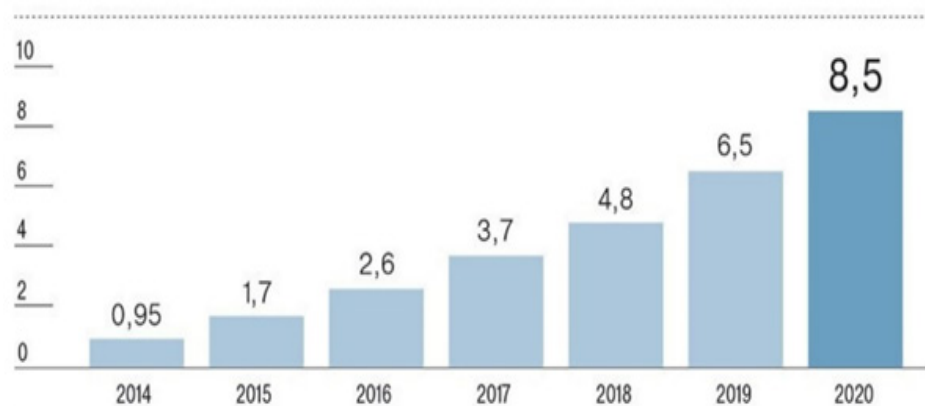


Table 2. The list of most numerously published books in Russia in 2020.

Source:Lebedeva 2020

Preliminary assessments predict 29% growth of the Russian electronic publishing market in 2021, from 8.5 billion rubles in 2020 to 11 billion rubles, and 27% growth in 2022, to 14 billion rubles. This is still modest in comparison with many developed countries.

The Head of Litres Sergey Anuriev attributes slow growth in this segment to the price difference between paper and e-books. Despite the USA and the UK markets, where electronic and paper books cost approximately the same, in Russia e-books are 30-40% cheaper. That's why the market share of e-books is underestimated and could be 17-18% (Lebedeva 2021d).

The data from different sources confirm that fluctuations

in the severity of restrictions related to the spread of the SARS-CoV-2 pandemic influenced the dynamics of e-book publishing turnover, both in e-book and audiobook sectors. For instance, Litres' revenues from audiobooks in the first half of 2021 increased by 50% compared to the same period in 2020, when the year-on-year increase was 45.5% (Lebedeva 2021b). The Russian audiobook market demonstrates especially rapid growth, mainly because it is at the very beginning of its development. Vladimir Kharitonov, head of the Association of Internet Publishers, argues that the entire e-book market in Russia has lagged behind the US one by about five to seven years, while the Russian audio book market is three to four years behind. The Russian Ministry of Digital Development, Communications and Mass Media reported that in 2020 the audio book sales amounted to 2.1 billion rubles (Russian book market). By the end of 2021, experts predicted an increase to 3 billion rubles (Lebedeva 2021b), and further growth in 2022.

However, the market conditions in the first half of 2020 and the same period in 2021 were fundamentally different. In 2020, the movement of people was limited, and the increase in purchases of e-books and audio books could be attributed both to consumers' reduced access to paper bookstores and to the declining incomes (retail prices for paper and e-books differ greatly in favor of e-books prices). In the first half of 2021, by contrast, the movement of people was not restricted, including long distance travel. Therefore, in March-June 2020, most Russians worked remotely and could not listen to audio books (on metro) on the public transport or in their cars. In 2021 these opportunities returned. People travel again throughout Russia and abroad and actively listen to audio books while traveling. Preliminary assessments predict 29% growth of the Russian electronic publishing market in 2021, from 8.5 billion rubles in 2020 to 11 billion rubles, and 27% growth in 2022, to 14 billion rubles (Figure 5). This is still modest in comparison with many developed countries.

Trying to avoid certain financial risks, Russian book publishing companies at the initial stage of the SARS-CoV-2 pandemic in 2020 sharply reduced the volume of orders for paper books (which provoked a shortage of printing capacity and an increase in prices for printing services). Among said risks are threats posed by the intellectual property theft community in the e-book publishing sector. These threats are typical for the entire world as well as for Russia usually mentioned among countries with high levels of online piracy and lack of effective enforcement, such as Argentina, Canada, Chile, China, Colombia, the Dominican Republic, India, Mexico, the Netherlands, Romania, Switzerland, Thailand, Ukraine, and Vietnam (Special 301 Report 2021). Although the loss from copyright infringement in the Russian book market has

gradually decreased due to targeted measures, in the previous decade Russia still accounted for over 32% of global copyright infringements in the media industry (Tsykina 2016). In addition to platforms involved in the unlicensed distribution of video, audio, game and book products, such as RuTracker.Org, Torrent-Games.net, rapidgator.net, mygully.com, rutor.org, Kinozal.tv, tfile.me, nnm-clab.me, games.net, popular Russian social networks, such as vk.com and odnoklassniki.ru, also damage the industry heavily.

In 2021, Russian book publishing companies continued to complain about the rampant copyright infringements in social networks. For instance, head of the Association of the Internet copyright protection Maxim Ryabyko underlined that for audiobooks YouTube was the most concerning platform in terms of free copies distribution, and for e-books the main free competitors were Telegram and Avito (Lebedeva 2021c). Sergey Anuriev also mentioned the Telegram platform as a source of free distribution of e-book copies. He assessed the potential annual damage caused by intellectual property theft in the Russian media industry as \$15 billion (Lebedeva 2021d). In September 2021, the Association of the Internet copyright protection sent to the Federal Service for Supervision of Communications, Information Technology and Mass Media a demand to bring the owner of Telegram messenger to administrative responsibility for not removing illegal copies of e-books. Earlier, in March 2021, the management of Avito, another platform for e-book piracy, had opted to avoid conflict with book publishers and banned advertisements for e-copies of books and audiobooks (Istomina 2021).

Under such conditions, and given the natural competition between companies, the above-mentioned tools and methods such as dropping subscription prices and splitting them into luxury and less expensive categories became more of a forced measure. However, the implementation of such tools and methods become beneficial for all of the involved parties (stakeholders, publishers and consumers). According to Maxim Ryabyko, head of the Association of the Internet copyright protection, inexpensive subscriptions could better attract users who do not want to waste their time looking for an illegal copy and who are ready to pay 200-300 rubles, but not 500 rubles (Lebedeva 2021).

3.3. Thematic and platform preferences of Russian consumers

To identify the readers differences in Russia and other world it seems necessary to take into account the dynamics of both thematic (content) and platform preferences of Russian consumers. The All-Russian Book Rating, based not on output, but on sales figures, became the first rating that primarily reflects book readers' interest for particular topics and determines the main vectors of

consumer demand. As far as thematic preferences are concerned, according to the ranking data, the main driver of the book market turned out to be customer preference for applied literature children's books and nonfiction books (Figure 2).

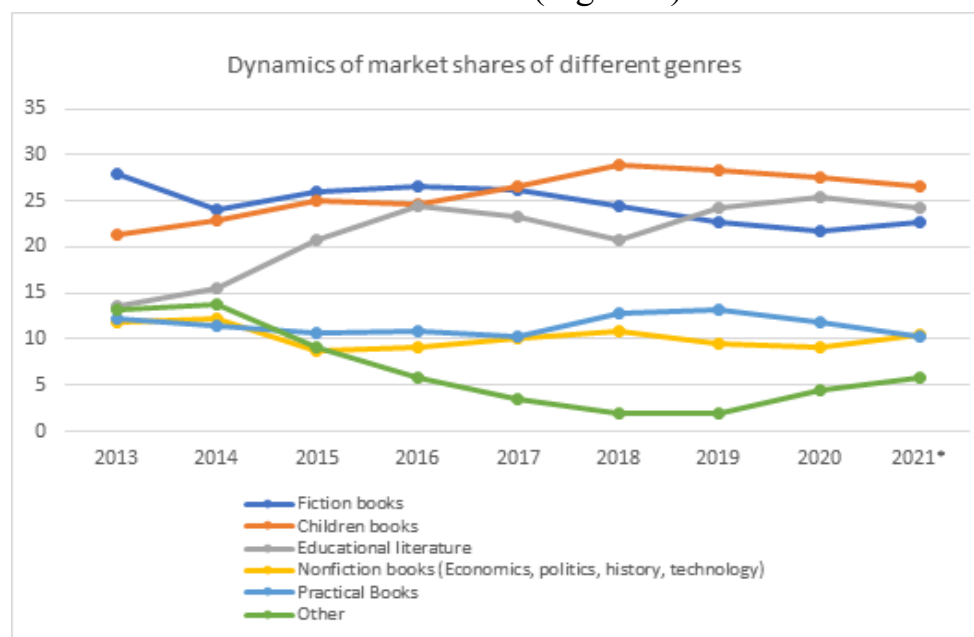


Figure 2. The share of various genres in the turnover of the Russian book market in 2013-2021,% (excluding public procurement and electronic publications).

Source: Russian book market 2021

In many countries, including the United States, there is growing consumer interest in non-fiction literature. In some other countries, for example France, the Practical Books segment showed a decline (-7.2%), then health books showed an increase of 7.5%, as did cookbooks, especially the DIY segment with a 15.8% increase. (Wischenbart and Fleischhacker 2020). Russian readers however prefer to buy fiction books, while the segment of practical books slightly fluctuates on the same level.

The vast majority, namely 70% of the Top 50 bestsellers in the Russian Book Union (RKU) rating, are books written by foreign authors. While in the fiction section the ratio of Russian and foreign authors is 1:1, in the non-fiction section Russian writers authored only 7 books out of 25 bestsellers, that is, the ratio is 30:70. The same situation is in the children's books market - only one Russian writer appeared in the section of bestsellers for children. In the audiobook segment, operators also note the growing interest of Russian readers towards foreign authors. According to the data of the e-book publishing service Storytel, in 2020 in the top 10 audiobook there was only one Russian author.

Though one should take into account the dominant interest of Russian consumers in foreign authors in the production plans of publishers, it seems to be more "mechanistic" than stemming

from content superiority. This interest is due, on the one hand, to a shortage of high-quality domestic content, and on the other hand, to the relative ease of buying rights, translation, and reprinting of foreign authors.

As for platform preferences and the unfulfilled forecasts mentioned above, by the beginning of the 2010s it is predicted the imminent end of the era of paper books and their complete replacement by electronic books. The grounds for such forecasts were, among other things, the evidential financial decline of the paper book market volume. According to Rospechat data, in 2011-2016 these volumes gradually decreased from 80.581 billion rubles to 72.152 billion rubles, respectively (Figure 3).

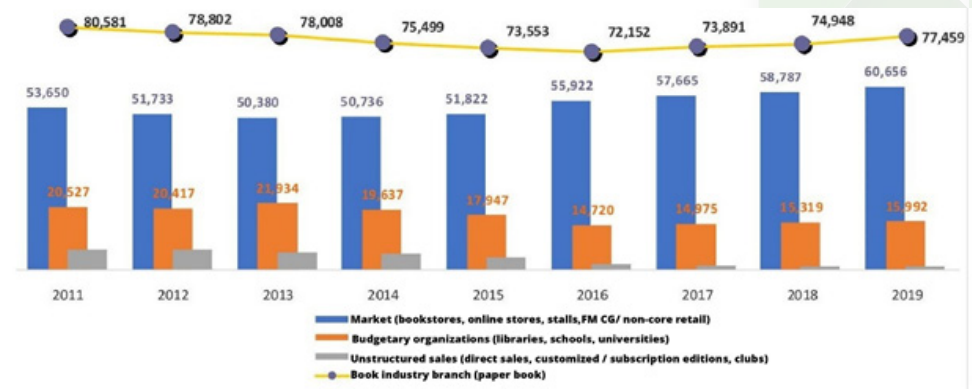


Figure 3. Dynamics of volumes on the paper book market (bln. Rub.)

Source: Russian book market 2020

However, in the years that came, the money turnover of paper books not only recovered but also turned into steady growth, to the surprise of most experts and market operators (Miltchin 2021).

The collected quantitative data allowed us to take a deeper look at the preferences of Russian readers. Our sample consisted of 280 respondents, 80% of women and 20% of men. The age distribution was quite balanced: 30% of middle-aged (35-44), 23% of 18-24 years, 18% of 45-54 years, 18% of 25-34 years. Most of the respondents had a university education (80.5%) and lived in big cities (69%), 53% of them had children (33% don't have), 80% had an average income. Figure 4 shows preferred genre of books reported by respondents.

Most of the respondents preferred to buy books in electronic marketplaces (51%), specialized electronic bookstores (50%), 37% chose offline bookstores, 24% bought books in mobile applications (more than one answer was available). These data are in accordance with previously made research (e.g., in 2021 share of online sales reached 45%) (Russian book market 2021). It is explained by an increase in purchases in the regions, expansion of the network of pick-up points, and the development of marketplaces.

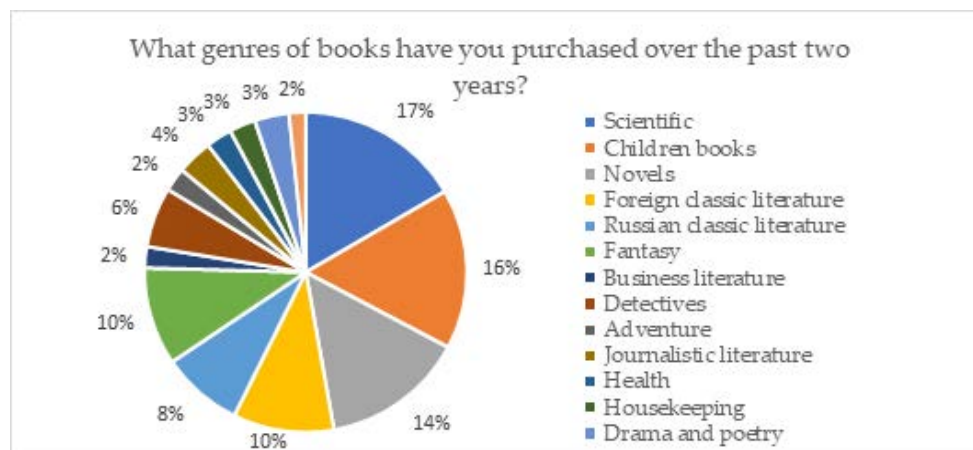


Figure 4. Preferred genres of the purchased books

48% relied on recommendations while choosing a book, 46% read and trusted book reviews, 46% read the recommendations of a publisher, 42% considered feedback in social networks, 29% received recommendations in mobile applications. 89% of respondents had stored books for more than 10 years.

68% of respondents had experience in buying secondhand books. 96% have presented a book at least once, and 68% believed that a book could be a great present if you knew the preferred genre of the person you were giving it to. It is interesting to note, that 7% answered that a book could be a good present for children, but 2% mentioned that a book was a good present only for middle-aged and older people.

In Soviet times, many people have been collecting series of books. However, most of the respondents (58%) answered that they never bought collection editions. If we consider the readers beliefs regarded the quantity of books purchased, we see that 30% of respondents answered that they bought a book approximately once a month, 25% once per 2-3 months, 22% several times per month, 15% semi-annual. 53% mentioned that the number of purchased books for them will be the same for the incoming year, and only 35% believed that this amount would increase. Only 23% have used subscription services when purchasing books and 4% would use such services in the nearest future.

Most of the respondents bought paper books (94.2%), 39.4% bought books in electronic format, and 15.8% bought audiobooks (it was the multiple-choice question). 74% preferred books in paper format – that proves H1 (χ^2 Pearson criterion is 25.59 $p < 0,001$, ANOVA $F = 3,865$, $p < 0,05$).

74% of respondents thought that electronic books would not completely replace paper books in the nearest future (5-10 years), 20% believed that electronic books would eventually completely replace paper books but not in the nearest future. 65% mentioned that books at home gave them the opportunity to reread some parts

that had piqued their interest earlier, 64 % that books at home could be a good way to distract teenagers away from gadgets, 56% said that books at home could be an important part of family leisure. 24% of the respondents thought that books could look good in their home interior and 15% were sure that books at home added status to the owner.

We also asked the respondents if they were ready to become writers: 47% said “No”, and 44% said “Yes” to the question. Now that the self-published electronic books are very popular among many readers on Russian platforms, the biggest book marketplaces (e.g. Litres) give authors such opportunity to publish their books. Readers can donate to the author if they like his book. We asked in the questionnaire if our respondents have ever bought or read self-published books, and 46% answered that they have had such experience.

The analysis of consumer preferences suggests that despite the general consistency of the Russian book publishing dynamics with the global trend towards the reduction of the number of paper books and a shift in the share of purchases towards e-books, the volume of the e-book publishing sector in Russia will increase more slowly than in other countries, including the US and the UK. This will manifest itself in the fact that in Russia, the cost of electronic copies of books will be significantly lower than that of printed copies until the anti-IP theft measures ensure that retail prices for e-book sales will rise accordingly.

4. Discussion and Conclusions

Based both on the literature review, our own desk and field research, we can make some conclusions concerning the forecasted decline of print book publishing in the face of digitalization.

Our research has confirmed that the current ratio of paper and e-books will remain almost the same in the nearest 3-5 years. This result is consistent with the conclusions of other researchers discussed above in this paper. It is remarkable that the whole world expected the imminent retreat of paper book publishing under the onslaught of the e-book. These expectations, just like in Russia, were not justified. That is, paper printing has not only lasted everywhere up until now but in some cases even increased the volume of production and sales, e.g., paper books segment is more than 90% in France and Brazil, 80% in the USA, with a decreasing share of digital books in recent years (Rabot and Chartier 2020).

Researchers in other segments related to book publishing also have their doubts about the imminent shift in consumer interest from the traditional paper format to the electronic one. For example, Baroni et al. (2021) discuss the Franco-Belgian culture and confirm that unlike other industries such as cinema, TV, radio

or recorded music that have been seriously reshaped by the digital format, the paper books segment (including comics) haven't been so much damaged.

However, if we follow the logic of different points of view, it turns out that they are not as contradictory as they may seem at first sight. They both ultimately lead to the thesis that as long as the role of paper book publishers remains dominant, the volumes of output and turnover of e-book publishers will be more modest. However, given the interest of paper book publishers in increasing their own cash turnover - including the strategy of expansion of electronic publishing - there is every reason to believe that the situation will change in the future towards a gradual increase in the market share of this segment.

The Russian market doesn't prove to have that many specifics compared to the overall global trends. The impact of the pandemic was about the same as in most countries. Our research suggests that consumer preferences in the Russian book market did not radically change due to the pandemic or due to the availability of books in electronic format. There was no intention to increase the number of obtained books, but people were still sticking to their habit of buying paper books.

Copyright infringement for digital products is another concern of the Russian book market, though the losses from it have gradually decreased due to targeted measures. In fact, this issue has existed in the world for decades, since the very beginning of the spread of the Internet across all sectors of the media industry. The Internet is "an extremely efficient vehicle for disseminating pirated content, thus competing unfairly with legitimate e-commerce and distribution services that copyright holders and online platforms use to deliver licensed content" (Special 301 Report 2021). Thus, it is estimated that global online video piracy costs the U.S. economy at least \$29.2 billion and as much as \$71 billion in lost revenue each year (Blackburn 2019).

This study has important implications for publishing market actors.

Firstly, the data presented in the introductory part to this study, including data from the All-Russian Book Rating, suggests that the readers' interest in the content of the Russian publishing industry is gradually shifting to non-fiction literature. Nevertheless, the preference for the fiction genre remains high. In Russia, foreign authors occupy the largest number of popularity ratings, and publishing companies should take this into account in their production plans. Additionally, they should consider the growing popularity of native publishing stars such as Boris Akunin, who can compete and ensure the profitability of projects bearing his name not only within Russia but also in the international market.

Secondly, the threat response tactics, which manifested themselves in a drastic reduction of spending on paper print production in the initial period of the SARS-CoV-2 pandemic in 2020, turned out to be misguided. The decline in demand for paper books was short-lived and publishers' actions forced printing companies to close, production capacity to fall and the cost of printing services to increase. It can be said with certainty that the above reasons will inevitably provoke an increase in the retail price of paper books for the end consumer and, consequently, a decline in the quantitative indicators of sales and, ultimately, in the profitability of publishers.

Thirdly, the main shift between the two publishing formats, even taking into account the current predominance of paper book production, will be in the direction of e-book publishing. However, the turnover of the digital publishing sector will not reach parity with the paper books sector for a long time due to the price difference in retail. Based on the above analysis and taking into account the increased competition with e-book publishing companies, made worse by the onset of the SARS-CoV-2 pandemic, we recommend paper book publishers to preserve and develop existing publishing and author brands, and to seek new author brands with a pre-planned paper and electronic format.

There is a number of limitations to this study. First, the scope and the potential to generalize our findings deserve discussion, being based on secondary data and interview research. The quantitative empirical data collected in the study do not allow us to get a precise picture of the current shift in the Russian print book market.

Finally, future studies can compare our findings for Russia with other emerging markets unveiling long-term changes in the publishing business and increasing the scope and comprehensiveness of research.

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About the authors:

MURATOVA Nozima — DSc, Vice-rector for Research and Innovations, Journalism and Mass Communications University of Uzbekistan. Tashkent city, Center-5, Kiyot-88, nozima.muratova@jmcu.uz

SHERESHEVA Marina — Doctor of Economics, Professor, Director of the Center for Network Economics Research, Head of the Laboratory of Institutional Analysis of the Faculty of Economics of Moscow State University named after M.V. Lomonosova, editor-in-chief of the BRICS *Journal of Economics*, executive editor of the journal «Bulletin of Moscow University. Episode 6. Economics». Department of Economics, Lomonosov Moscow State University, 119991 Moscow, Russia; m.sheresheva@gmail.com



BUZULUKOVA Ekaterina — Ph.D., Senior Researcher, Laboratory for Institutional Analysis, Faculty of Economics, Lomonosov Moscow State University; buzulukovaev@yandex.ru

VALITOVA Lilia — Ph.D., Senior Researcher, Laboratory for Institutional Analysis, Faculty of Economics, Lomonosov Moscow State University; lvalit@gmail.com

ОЗНАЧАЕТ ЛИ РОСТ ИНТЕРНЕТА УПАДОК ПЕЧАТНЫХ КНИГ?

Аннотация: Последние изменения на книжно-издательском рынке отчасти противоречат некоторым предыдущим прогнозам. Вместо тех, которые еще недавно казались весьма устойчивыми, возникают новые тенденции, которые никто не мог предсказать. Целью настоящей статьи является раскрытие глубоких сдвигов в структуре книгоиздания и продаж, новых моделей потребительских предпочтений с уделением особого внимания специфике российского книжного рынка. Чтобы получить более полную картину, мы проанализировали как вторичные данные, полученные из открытых источников, правительственных документов и официально опубликованных отчетов, так и первичные данные, собранные посредством интервью и опросов. Результаты подтверждают, что развитие российского книжно-издательского рынка соответствует мировым тенденциям, хотя и имеет свои особенности, значимые для издательских компаний и их производственных планов. Так, если в развитых странах электронные и бумажные книги стоят примерно одинаково, то в России электронные книги стоят на 30-40% дешевле. Другая особенность заключается в том, что большинство рейтингов популярности занимают зарубежные авторы. В то же время нынешняя «борьба за клиентов» между производством электронных и бумажных книг является скорее долгосрочным явлением, и ожидать резкого изменения предпочтений потребителей в отношении типов книг в ближайшем будущем не стоит.

Ключевые слова: издательский рынок; цифровизация; пандемия; Потребительское поведение; Россия

Об авторах:

МУРАТОВА Нозима — доктор филологических наук, проректор по научной работе и инновациям Университета журналистики и массовых коммуникаций Узбекистана; Ташкент, Центр-5, Киёт-88; nozima.muratova@jmcu.uz

ШЕРЕШЕВА Марина — доктор экономических наук, профессор, директор Центра исследований сетевой экономики, заведующая Лабораторией институционального анализа Экономического факультета МГУ имени М.В. Ломоносова, главный редактор журнала BRICS Journal of Economics, ответственный редактор журнала «Вестник Московского университета. Серия 6. Экономика»; m.sheresheva@gmail.com

БУЗУЛУКОВА Екатерина — к.э.н., старший научный сотрудник лаборатории институционального анализа экономического факультета МГУ имени М.В. Ломоносова; buzulukovaev@yandex.ru

ВАЛИТОВА Лилия — к.э.н., старший научный сотрудник лаборатории институционального анализа экономического факультета МГУ имени М.В. Ломоносова; lvalit@gmail.com

MEDIA TADQIQOTLARINI BOSHQARISH METODOLOGIYASI
AHOLINING AXBOROT VA MEDIA SAVODXONLIGI
MUAMMOLARINI HAL QILISH VOSITASI SIFATIDA:
O‘ZBEKISTONGA NAZAR

Annotatsiya: Kitob nashriyot bozoridagi so'nggi o'zgarishlar qisman oldingi prognozlariga ziddir. Yaqinda barqaror bo'lib tuyulgan tendentsiyalar o'rniga hech kim bashorat qila olmaydigan yangi tendentsiyalar paydo bo'lmoqda. Ushbu maqola Rossiya kitob bozorining o'ziga xos xususiyatlariga alohida e'tibor qaratgan holda kitob nashr etish va sotish tuzilmasidagi chuqur o'zgarishlarni, iste'molchilarning xohish-istaklarining yangi shakllarini ochib berishga qaratilgan. To'liqroq tasavvurga ega bo'lish uchun ochiq manbalardan olingan ikkilamchi ma'lumotlarni, davlat hujjatlari va rasmiy e'lon qilingan hisobotlarni hamda intervyu va so'rovlar orqali to'plangan birlamchi ma'lumotlarni tahlil qildik. Natijalar shuni ko'rsatadiki, Rossiya kitob nashriyot bozorining rivojlanishi jahon tendentsiyalariga mos keladi, ammo nashriyot kompaniyalari va ularning ishlab chiqarish rejalari uchun o'ziga xos xususiyatlarga ega. Shunday qilib, rivojlangan mamlakatlarda elektron va qog'ozli kitoblarning narxi taxminan bir xil bo'lsa, Rossiyada elektron kitoblar 30-40% arzonroq. Yana bir o'ziga xos xususiyat shundaki, xorijiy mualliflar mashhurlik reytinglarining ko'p qismini egallaydi. Shu bilan birga, elektron kitoblar va qog'oz kitoblar ishlab chiqarish o'rtasidagi hozirgi "mijozlar uchun kurash" ko'proq uzoq muddatli hodisadir va biz yaqin kelajakda iste'molchilar uchun kitob turini afzal ko'rishda keskin o'zgarishlarni kutmasligimiz kerak.

Kalit so'zlar: nashriyot bozori; raqamlashtirish; pandemiya; iste'molchi xatti-harakati; Rossiya

Mualliflar haqida:

MURATOVA Nozima – filologiya fanlari doktori, O‘zbekiston jurnalistika va ommaviy kommunikatsiyalar universiteti ilmiy ishlar va innovatsiyalar bo'yicha prorektori; Toshkent, Markaz-5, Kiyot-88;
nozima.muratova@jmcu.uz

SHERESHEVA Marina – iqtisod fanlari doktori, professor, Tarmoq iqtisodiyoti tadqiqotlari markazi direktori, M.V.Lomonosov nomidagi Moskva davlat universiteti Iqtisodiyot fakulteti institutsional tahlil laboratoriyasi mudiri. BRICS Journal of Economics jurnalining bosh muharriri, “Moskva universiteti xabarnomasi. 6-son Iqtisodiyot” jurnalining ijrochi muharriri.
m.sheresheva@gmail.com

BUZULUKOVA Yekaterina – iqtisod fanlari nomzodi, M.V.Lomonosov nomidagi Moskva davlat universiteti Iqtisodiyot fakulteti institutsional tahlil laboratoriyasi katta ilmiy xodimi; buzulukovaev@yandex.ru

VALITOVA Liliya – iqtisod fanlari nomzodi, M.V.Lomonosov nomidagi Moskva davlat universiteti Iqtisodiyot fakulteti institutsional tahlil laboratoriyasi katta ilmiy xodimi; lvalit@gmail.com