

Drawing the Global Map of Publishing Markets 2012

International
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Drawing the Global Map of Publishing Markets 2012: An experimental introduction

By Rüdiger Wischenbart

The Global Map of Publishing Markets is the first visual representation of publishing around the world by the numbers. The map demonstrates the way that books and the industry behind them reflect access to knowledge and to the opportunity to dive into the imaginary worlds brought to life by written words—where books are freely available and where books are hidden behind scores of cultural, social, or economic obstacles. The map and the data behind it provide a better understanding of the opportunities, as well as the challenges, in making reading and access to books universal.

The 2012 Global Map of Publishing Markets displays a world of striking inequalities. A few countries form powerful centres of gravity, with several more—those which economists call “emerging markets”—shown at least relatively equal to their size in terms of territory and population. But the majority of markets are difficult to identify, lost in the periphery.

Yet the Global Map of Publishing Markets and, even more so, the underlying data and research on market developments, do more than portray an uneven playing field. They can be used as a road map for anyone concerned with the globalisation of culture, knowledge, and learning; they highlight huge opportunities for all those who are in the business of publishing and related industries. They hopefully serve as incentive and encouragement to stakeholders particularly in emerging markets and in lesser-represented regions. The strategic goal going forward is certainly adjusting this map so that in the future, the world of publishing more closely resembles that standard map of geographers and demographers—one in which countries have a roughly identical size with regard to their population and publishing market.

On the approach and methodology of the Global Map of Publishing Markets 2012

The Global Map of Publishing Markets represents domestic publishing markets by market value at consumer prices. This angle has been chosen because it seemed to be the most robust, most researchable, and most basic approach in view of gaining an understanding of publishing around the world on an empirical basis. Many more diversified aspects obviously come to mind to organise such a map, and they will form further explorations of the theme laid out here. In this first attempt, however, our goal was simply to create a starting point.

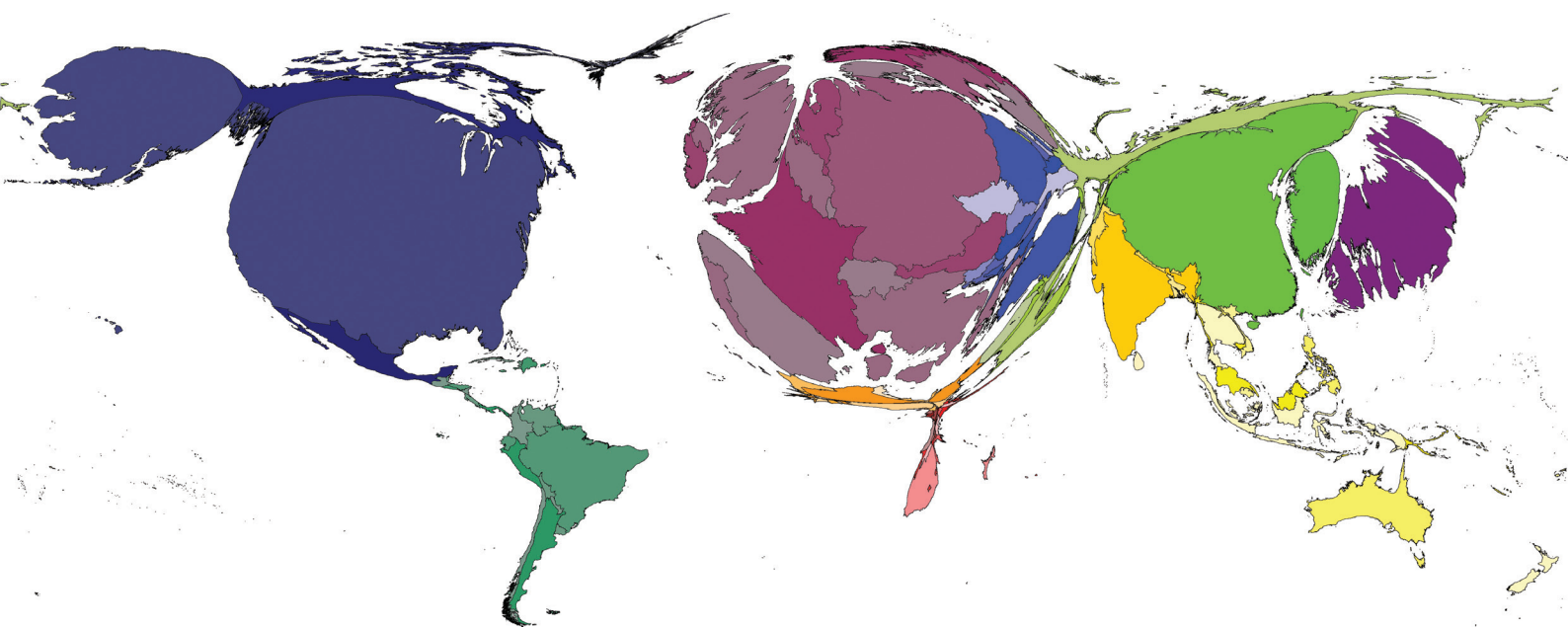
The initial research effort was launched in 2011 by the International Publishers Association (IPA), with additional funding from the London Book Fair and BookExpo America. The methodology and the research were developed and conducted by Rüdiger Wischenbart Content and Consulting.

The first step was to gather as much available data as realistically possible from the best available sources to start a database logging three primary indicators: first, the total net sales by publishers in a market; second, the market's value at consumer prices; and third, the number of new title releases and re-editions. The data relied chiefly on input from national publishers' associations and related organisations. For most countries, either only publishers sales or the market value was, if at all, available. The new title releases and re-editions functioned as a first context figure. These first findings were then checked for errors and plausibility through a pre-release in 2011 and early 2012.

The second step was to ask industry professionals – notably publishers, book fair organisers and regional intermediaries – for their critical assessment of the initial findings. A second body of data, primarily exports statistics from the largest exporting markets (UK, US, France and Spain), was added as a benchmark. This data was used to shed some light on regions that had little or even no publishing market statistics.

The third step was to explore the context of publishing, as it turned out that publishing markets reflect socioeconomic parameters of a country and can be correlated in meaningful ways with population size and GDP per capita. This allowed us to develop an initial (and still experimental) algorithm to systematically estimate the size of publishing markets for which no empirical data are available. These estimates were then cross referenced with respective numbers from countries with reliable data and with assessments by local experts.

The resulting table of retrieved and estimated values were visualised with the Worldmapper toolset (www.viewsoftheworld.net). Special thanks go to Dr Benjamin D. Hennig from University of Sheffield. Further details on the methodology will be published separately.



Country	Total (Publishers' net revenues in €m)	Total (market value at consumer prices in €m)	New titles and re-editions per 1m inhabitants	GDP 2011 per capita (\$, Worldbank)	Population
World		€105,614		\$10,034	6,894,377,794
United States	€21,500	€31,000	1,080	\$48,442	311,591,917
China		€10,602	245	\$5,430	1,344,130,000
Germany	€6,350	€9,734	1,172	\$43,689	81,726,000
Japan		€7,129		\$45,903	127,817,277
France	€2,804	€4,587	1,242	\$42,377	65,436,552
United Kingdom	€3,738*	€4,080	2,459	\$38,818	62,641,000
Italy	€1,900	€3,417	956	\$36,116	60,770,000
Spain	€1,820	€2,890	1,692	\$32,244	46,235,000
Brazil	€2,027	€2,546	285	\$12,594	196,655,014
India	€1,675	€2,500		\$1,489	1,241,491,960
Canada	€1,535	€2,342		\$50,345	34,482,779
Korea, Rep.	€1,408	€2,013	849	\$22,424	49,779,000
Russian Federation		€1,875		\$13,089	141,930,000
Australia		€1,520	877	\$60,642	22,620,600
Turkey		€1,150	474	\$10,498	73,639,596
Netherlands		€1,126	1,412	\$50,087	16,696,000
Poland	€697	€1,123	775	\$13,463	38,216,000
Belgium	€519	€850		\$46,469	11,008,000
Norway	€304	€808	9,227	\$98,102	4,952,000
Switzerland		€806		\$80,391	7,907,000

* Includes exports.



Notes on sources, methodology and credits

These data on publishers' net sales and publishing markets at consumer value have been collected at the best available sources, provided ideally by either professional trade organisations or government statistics. We gratefully acknowledge the input from all the listed countries' national and the European publishers professional organisations. In cases where only either of these numbers were available (net sales or market value), an estimate was made by us on the other, provided that the estimate could be double checked, e.g. by national experts. For India, only an overall estimate could be produced, with help from the US Department of Commerce. Estimated numbers are represented in grey. We add further elements, notably countries' population, GDP per capita, and the number of annual new title and re-edition releases as context, to emphasise how book and publishing are connected to such related parameters.

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Caveat: This is a work in progress, started in 2011, and algorithms as well as estimates are still experimental. Critical feedback and additional information are highly welcomed.

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