

Publishing Global Industry Guide 2015-2024

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Abstracts

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SUMMARY

Global Publishing industry profile provides top-line qualitative and quantitative summary information including: market size (value 2015-19, and forecast to 2024). The profile also contains descriptions of the leading players including key financial metrics and analysis of competitive pressures within the market.

KEY HIGHLIGHTS

The publishing market consists of books, newspapers and magazines.

The book publishing segment includes publishers of academic, professional, general and other (fictions, non-fiction etc) books. The market value of this segment refers to the domestic B2C sales of books only at the retail sales price (RSP).

The newspaper segment is valued as the sum total of all revenues gained from the sale of newspapers including those gained through circulation, subscription (inc. online subscription), and advertising revenue.

The magazine segment value is calculated as the revenues generated by publishers from B2C sales of copies of their products, and does not include advertising revenues.

Any currency conversions used in the creation of this report have been calculated using constant 2019 annual average exchange rates.

Figures presented in this report are calculated applying the 'middle path' scenario - this is based on the current situation in countries where the epidemic burst first, like China as a model countries and the announcements made by governments, stating that the abnormal situation may last up to six months.

The assumption has been made that after this time the economy will gradually go back to the levels recorded before the pandemics by the end of the year. It is also assumed that there is no widespread economic crisis as seen back in 2008 due to announced pay-outs across countries.

At the moment of preparation of this report in April 2020 the economic implications of the lock downs of many economics are still very difficult to predict as there is no indication how long the pandemics could last, the number of sectors forced to stay closed and the scale of the governmental' aid involved. At the same time the weight of the pandemic seriousness is applied on the individual countries in this report based on death to population ratio recorded in countries.

Majority of the industries will see the decline in volume of the goods and services offered by companies. Usually the lower demand would cause the decrease the prices level. However, amid many governments' ordered for many industries to lock down and so the supply chain is distorted that in great pictures mitigate the results of lower demand.

Applied scenarios differ depending on the individual sector, however generally sectors which involves intensive manual labor and face to face interaction seem to be hit the most by present situation. On the other hand the internet based businesses as well as the producers of the vital, subsisted products and services seems to take advantages of the current events.

The global publishing market had total revenues of \$258.7bn in 2019, representing a compound annual rate of change (CARC) of -0.2% between 2015 and 2019.

The books segment was the market's most lucrative in 2019, with total revenues of \$128.2bn, equivalent to 49.6% of the market's overall value.

Some players have struggled due to insufficient ecommerce capacity, but

sustained demand through lockdowns has generally been a boon where supply has been able to meet it.

SCOPE

Save time carrying out entry-level research by identifying the size, growth, major segments, and leading players in the global publishing market

Use the Five Forces analysis to determine the competitive intensity and therefore attractiveness of the global publishing market

Leading company profiles reveal details of key publishing market players' global operations and financial performance

Add weight to presentations and pitches by understanding the future growth prospects of the global publishing market with five year forecasts

REASONS TO BUY

What was the size of the global publishing market by value in 2019?

What will be the size of the global publishing market in 2024?

What factors are affecting the strength of competition in the global publishing market?

How has the market performed over the last five years?

What are the main segments that make up the global publishing market?

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About

Global publishing market has been declining in recent years, although very slight growth was registered in 2017. Sluggish growth is expected in the forecast period. Declines in this market are being driven by the contraction seen in the newspapers and magazines segments of the market. Newspapers are being impacted by the fall of advertising spend, both in print and digital form. What's more, the average time spent on mobile phones per day is increasing; this permits increased exposure of the customer to digital adverts. Similarly, circulation revenue is also falling as the availability and accessibility of free news content continues to grow.

Books segment was the market's most lucrative in 2017, with total revenues of \$121bn, equivalent to 46.3% of the market's overall value. The newspapers segment contributed revenues of \$93bn in 2017, equating to 35.6% of the market's aggregate value. This market will remain subdued as social media and the prevalence of mobile devices continue to act as a disruptive force in the newspapers segment of the market. What's more, magazines will continue to struggle as the availability of substitutes, particularly online content, continues to grow.

China accounts for over 44% of the Asia-Pacific market value. Steady economic performance has laid a solid financial foundation for the Chinese publishing market to grow healthily. In addition, the increasing popularity of online books has also contributed to the growth of the market value. Furthermore, with increasing internet and mobile penetration rates in China, digital publishing has experienced rapid growth in recent years. Despite the increase in digital publishing, traditional print publishing has maintained steady growth, especially in the education sector where growth has been strong.

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