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***Platform games: The writer, the publishing industry and debates over non-print book formats in the twenty-first century****Abstract*

The twenty-first century has seen significant evolution of publishing platforms. Since the publication of the first commercial ebook in 2000, much of the public discussion around the ebook's place in English-language publishing has cast it as a rival to printed books and a threat to the industry, rather than an alternative vessel for content delivery. At various times during that seventeen years, both ebooks and paper books have been declared a spent force, with the other seen as on the brink of triumph. During this time, audiobooks have evolved significantly, and other narrative platforms have arisen. This paper examines the ongoing debates about platforms, the selective use of, and extrapolation from details that has occurred as part of it, and the framing of the predictions that have characterised it, many of which have proven to be inaccurate. It argues for a writer-centred view that understands this debate, but sees all formats as a way to reach readers, and worthy of consideration in a writer's publishing plans.

Keywords: ebooks, audiobooks, enhanced ebooks

'At last. Peak digital is at hand' (Jenkins 2016). So announced Simon Jenkins in the *Guardian* in May 2016, citing a fall in the sale of specialised ereading devices, along with Publishers' Association UK sales figures showing a 1.6% fall in ebook sales from 2014 to 2015. The article's sub-head boldly claimed, 'The hysterical cheerleaders of the ebook failed to account for human experience, and publishers blindly followed suit. But the novelty has worn off.'

He was, and is, far from alone in holding that view, and expressing it with passion. Two years before, at the Oxford Literary Festival, Tim Waterstone, founder of the British book retailer Waterstones, said, 'I think you read and hear more garbage about the strength of the ebook revolution than anything else I've known,' and declared that ebook sales were already in decline (Furness 2014).

Data from the Association of American Publishers showing a drop in publishers' ebook revenue in early 2015 provoked a comparable response, such as Phil Wahba's article in *Fortune* with the emotive headline, 'Book Sales Hang on as Ebooks Wither' (Wahba 2015). The same message was coming from some with a commitment to ereading, though with a tone more of resignation. At *GoodEReader*, Michael Kozlowski's article entitled 'Ebook Sales Have Peaked' includes the sentence, 'It looks like from all of the data currently available that ebook sales have peaked and it is very unlikely the format will ever account for more than 21% of global sales' (Kozlowski 2015).

Perhaps spurred on by data from the two largest English-language publishers' associations and the 2015 Nielsen survey of the US book industry showing the digital share of the overall book market reducing from 27% to 24% (Nielsen Company 2016), it became commonplace to assert that ebook sales have peaked, but is it accurate? If so, is it as permanent as the talk suggests? And what are writers and publishers to make of it, when contemplating how to connect books with readers?

Ebooks have peaked before, and been declared a fad before, though that seems to have been omitted from the discussion that has been ongoing since 2014. Since the publication of the first commercial ebook, Stephen King's *Riding the Bullet*, in March 2000 (King 2000a), the growth of ebook sales has been neither steady nor linear. Surges have typically been driven by the arrival of a specific new technology or ereading pathway that has proven popular, and plateaus occur when no new impetus for ereading has been forthcoming. At each surge and each plateau of ebook sales, it is tempting to extrapolate, with the straight line extending from the surges to the date of paper book and terrestrial bookshop oblivion and from plateaus to a permanent market-share ceiling.

While publishing books simultaneously on paper and digitally has become standard among established publishers, much of the ongoing conversation around 'peak ebook' focuses on pitting one platform against the other, in some cases as though ebooks are a threat to be seen off. Data from apparently authoritative sources such as publishers associations is cherry-picked or skim-read for articles such as those by Jenkins and Wahba in order to support the case that this is happening. But this, surely, is not in the interests of writers, publishers, readers or reading. Writers and publishers need to make publishing decisions based on an accurate interpretation of marketplace data. Meanwhile readers, through their book-buying activity, have already determined that, for the foreseeable future at least, there is a place for both platforms – print and ebook – and perhaps more, and it is incumbent upon writers and publishers to attempt to navigate this evolving landscape, rather than to crouch behind the parapet, hoping the siege is almost over.

Despite this, the debate continues and writers are drawn into it, as observers and also as participants. In some cases, it influences decisions they make about writing and publishing. This paper assesses the data underlying the hyperbole and examines the evolution of non-print book formats and their markets in the twenty-first century to date, with a focus, ultimately, on cutting through format-supremacy debates to look at how writers – particularly writers who have built a career around the writing of books – might best respond to the evolution of new formats when pursuing publication of their work, in the hope of connecting it with readers.

**Ebooks**

When Stephen King's novella *Riding the Bullet*, was published by Simon & Schuster Online and a number of other digital platforms such as Mighty Words, it had the distinction of being 'the first work released exclusively in an electronic format by a major fiction author' (Minkel 2000: 20), and of being the first ebook sold by Amazon (Blessing 2000: 36). Across all sites, the novella was downloaded 500,000 times in the first few days (2000: 36). While many of these files were PDFs read on personal computers, it showed a strong interest in the potential of ereading at a time that long predates the arrival of the devices and formats we now use to read and the establishment of a broader ereading culture. All this, Rose Blessing observes, sparked 'a flurry of articles in the national press' about ebooks versus print publications (2000: 36).

But the publication of King's ebook was not without its challenges. Within days, hackers posted a free PDF version of the ebook on the Internet and, while Adam Rothberg, Director of Corporate Communications at Simon & Schuster, maintained that any piracy 'was limited to a few sites which were shut down pretty quickly' (Blessing 2000: 36), the ebook's vulnerability to theft became the dominant public narrative, raising doubts about the format. It would not be the last time, in the evolution of narrative platforms beyond print, that a partial truth took the wheel and drove the story.

Despite King's spectacular download figures, the ebook's move to the mainstream was still years away. The technology for ereading was not all it might have been, nor all it was going to be (and indeed will be). Readers were struggling to make the move away from paper. Dedicated ereading devices were in their infancy, and some way short of wide acceptance. As David Strom noted in 1999, in reviewing the recently released Rocket eBook and Softbook and prototypes of the Millenium E-Reader and the Everybook EB Dedicated Reader, 'None was as comfortable to read as a printed page. All had limited content available... The smaller units are harder to read, while the bigger ones like Everybook are bulky' (Strom 1999: 76).

In June 2000, King wrote that most of the readers who had contacted him about *Riding the Bullet*:

hadn't liked getting it on a screen, where it appeared and then disappeared like Aladdin's genie... Book lovers are the Luddites of the intellectual world. I can no more imagine their giving up the printed page than I can imagine a picture in the *New York Post* showing the Pope technoboogieing the night away in a disco. (King 2000b: 62)

While it is not exactly technoboogieing, in 2013 the *New York Post* would have the chance to run an article headed 'Pope Francis Worked As Nightclub Bouncer' (Li 2013). Perhaps the logic of booklovers as Luddites could shift too. Perhaps King himself even sensed that, or hoped for it, as, in June 2000, he set up his second online experiment, a serialised novel called *The Plant*. Subscribers were to pay a dollar per instalment, with nothing to enforce payment but an honour system and King's undertaking that he would stop the project if people failed to pay. After several instalments and a significant number of non-payments, he did just that, posting news of the project's abandonment on his website. With that, Guthrie reports, 'The optimism over ebooks in 2000 came to an abrupt end' (Guthrie 2006: 129).

By early 2002, ebook sales projections were being revised down significantly and, rather than pushing ebooks over the Internet as products, Stephen King was publishing free teasers to drive physical book sales. EA Vander Veer, in a piece published that year tellingly entitled 'The Revolution that Wasn't', cites several factors contributing to readers' decisions to keep reading on paper, particularly when reading fiction. These include lack of a consistent ebook format, confusion over the dollar value of electronic rights, an increasingly volatile publishing landscape and a reluctance to read long passages for pleasure on a flickering screen (Vander Veer 2002). Ereading looked like an experiment that had overcomplicated itself and yielded a Frankenstein hybrid of reading and computing that failed to make the most of either.

For several years, ereading and the technology supporting it made little progress. Richard Guthrie, in a discussion following publication of his article 'Riding the E-Frenzy of 2000' in *Logos* in 2006, stated 'ereaders have not developed much... Dump the current ereader because it isn't even worth discussing' (Esposito et al 2007: 51). In the same discussion, *Logos* editor, Charles Levine, said, 'I took another look at Sony's new ebook reader that was recently launched in mid-2006. I am appalled at how unappealing the new ereader is, even after all these years' (2007: 51). Both were seeking devices offering greater sophistication and a more reader-friendly experience designed to more closely mimic the comfortable experience of reading a paper book. Levine went on to say, 'An attractive iReader that is as sexy and as easy to use as an iPod would turn the book industry on its head' (2007: 53).

Whether it was quite as sexy as an iPod is debatable, but Amazon's Kindle was launched in November 2007. Barnes & Noble followed with their Nook in October 2009 and Kobo with their EReader in May 2010. With the arrival of more appealing ereading devices, ebook sales rose dramatically. Apple's launch of the iPad in January 2010 boosted this further by creating a non-specialist device that gave a pleasing ereading experience and would soon be purchased by millions. US ebook sales rose 1260% between 2008 and 2010 (Alter 2015). By early 2011, US advisory group Gartner reported that industry researchers were predicting a 70% annual growth rate for ereader sales globally (Barrett 2015).

In February that year, the REDgroup, the parent company of Angus & Robertson and Borders in Australia – chains responsible for 20% of the country's books sales – went into receivership (Lim 2011). Retailers across the industry in Australia were noticing a downturn. After 5% growth in 2009, Australian book sales contracted slightly in 2010, then dramatically in 2011, with falls of 13% in volume and 18% in value, and significant falls continuing into 2012 (Coronel 2012). In June 2011, with Australia's retailers of paper books challenged by the rise of a web-based book retailing model (exemplified by Amazon) and the emergence of a serious non-paper reading platform, Australia's Minister for Small Business, Nick Sherry, predicted that, 'in five years, other than a few specialty bookshops in capital cities, you will not see a bookstore. They will cease to exist' (Barrett 2015).

Bold predictions about seismic shifts in the book industry were back in vogue, in a way that they hadn't been since 2000. Like those earlier predictions, these too would prove to be overblown – bookstores did not cease to exist by June 2016 and sales of dedicated ereading devices peaked at twenty million units worldwide in 2011, falling to twelve million in 2014 as more readers opted to eread on non-specialist devices such as smartphones and tablets (Alter 2015) – but this is unlikely to be the last instance of over-extrapolating from short-term trends in book-buying.

While perhaps extreme and ultimately inaccurate, the predictions were an over-reading of patterns in evidence at the time. In January 2011, within only three years of readers embracing the Kindle, Amazon announced that, for the first time, it was selling more ebooks than paperbacks (Bradley et al 2011). According to Nielsen figures, US ebook sales went from US\$69m in 2010 to US\$165m in 2011, a 139% increase. From there, they increased a further 30% in 2012 and 13% in 2013 (Nielsen Company 2016). Nielsen figures, though, only record sales of books with ISBNs, something many independently published ebooks do not have. Despite not counting many ebooks, Nielsen still recorded sales as increasing, albeit probably at diminishing growth rates each year, in the absence of the dramatic advances in technology or retail approaches that had driven earlier rapid growth.

With increases in both average smartphone screen size and smartphone use, the 2014 to 2015 period marked another shift in the use of electronic devices for reading – the phone was becoming a significant reading tool. According to US Nielsen surveys, while the percentage of the ereading population reading primarily on tablets had increased from 30% in 2012 to 41% in 2015, the number of ebook buyers who used their phones to read at least some of the time increased from 24% to 54% in the same period (Maloney 2015). Judith Curr, publisher of Atria Books, stated that, 'The future of digital reading is on the phone. It's going to be on the phone and it's going to be on paper' (Maloney 2015).

Ebook sales in the US, though, appeared to plateau at 2013 levels, according to Association of American Publishers figures, and then dipped early in 2015. In the UK, the Publishers' Association reported digital sales for the year 2015 falling from £563 million to £554 million, and print sales growing minimally from £2.74 billion to £2.76 billion. 'Readers take a pleasure in a physical book that does not translate well on to digital' the Publishers' Association stated (Jenkins 2016), and declarations of 'peak ebook' became commonplace. Those figures, though, do not tell the whole story.

As Simon Jenkins admitted, the adult colouring book fad made a contribution to print sales in 2015. While fads and franchises not uncommonly exert significant effects on overall industry sales, skewing figures for both print and ebook sales from one year to the next (as discussed below), the spike in sales of adult colouring books is specifically relevant when looking at the performance of different publishing platforms in 2015 as, unlike fiction blockbusters, sales of colouring books are almost entirely in print format. In the case of the UK market, the £20.3 million generated by adult colouring books in 2015 (Houlder 2016) matched the growth in the overall print market and, without it, the pattern of zero or negative growth seen in the preceding seven years would have continued. In the US, Nielsen reported that sales of adult colouring books surged from one million units in 2014 to twelve million in 2015 (Nielsen Company 2016). Australia was also part of the adult-colouring craze. Nielsen BookScan's November 2015 Australian top twenty featured eight colouring books, each one of them outselling the most successful Australian novel (Cooke 2015).

Other factors were at work as well. Following the renegotiation of pricing between major American publishers and Amazon, ebook prices rose in the US Kindle Store in late 2014 and 2015. Until then, Amazon had pushed publishers to keep prices no greater than \$9.99, and buyers had become conditioned to paying less than \$10 for ebooks. Publishers that increased prices above that mark subsequently recorded a fall in ebook receipts, and some identified higher prices as a factor (Trachtenberg 2015). According to Jeffery Trachtenberg, publishers viewed this pricing change as

involving ‘some sacrifice, but they felt it was worth it to keep Amazon in check. What’s more, they have noticed a bump in sales of physical books that is possibly related to the higher price of digital books’ (2015).

The specific books published from one year to the next had an impact too. Some publishers noted that 2015 saw fewer ‘hot’ titles (Trachtenberg 2015). The AAP itself was prepared to name ‘hot’ titles that had boosted sales in previous years. With nothing to match *Frozen* and the *Divergent* series, children’s and young-adult ebook sales fell 45.5% in 2015 in the US, following ‘tremendous growth’ in 2014 (Bluestone 2015).

Furthermore, while the AAP figures are based on a survey of 1200 publishers and often seen as authoritative, the Amazon Kindle Store stocks many independently published titles and titles published by small and micro publishers not captured by the survey. At the same time as the AAP was reporting a drop in overall ebook sales, Amazon, the retailer with the majority of the US ebook market, reported increases in sales in terms of both units and revenue (Trachtenberg 2015).

Away from sales and sales figures, other avenues were opening up that facilitated continued growth in ereading that was not feeding into the statistics. Public libraries were lending ebooks and subscription ebook libraries were opening for business – Oyster in September 2013, Scribd the following month and Amazon’s Kindle Unlimited in July 2014. While subscriber downloads earned an author readers and, in the case of subscription libraries, revenue, they did not count towards sales.

David Montgomery, CEO of publishing services company Publishing Technology, drew on these factors to declare that publishing had split into two markets, with a widening gap between them (Montgomery 2015). Self-published and micro-published authors, particularly those writing genre fiction, were pricing their ebooks much lower and claiming an increasing share of the market, particularly through Amazon, while large publishers were increasing ebook prices in a way that reduced ebook sales, in his view using the reintroduction of agency pricing ‘as a strategy to support print book sales’ (2015).

This pattern has continued, and the rhetoric that pits one format against another appears to be continuing too. At the Digital Book World conference in January 2017, Nielsen presented 2016 data from more than thirty traditional US publishers (sales reports for the first nine months of 2016 and estimates for the final quarter) showing a fall in ebook sales from 2015 to 2016 and hardback unit sales overtaking ebooks for the first time since 2012 (Milliot 2017). Nielsen too nominated the return to agency pricing as the biggest driver. Despite their data being an estimate and covering relatively few publishers, and their attempts to explain the raw figures, *Publishers Weekly* ran its story on the presentation with the headline ‘The Bad News About Ebooks’ (Milliot 2017). Meanwhile, at the same conference, an analysis by the Author Earnings data site showed Amazon’s ebook sales growing 4% overall in 2016 (Dale 2017). The following week, the *Sydney Morning Herald* published a Bloomberg-sourced piece headed ‘How Print Beat Digital in the Book World’ (Bershidsky 2017).

It is too easy to fall into viewing the evolution in ebook and print sales solely through the prism of Amazon and its often public power struggle with publishers, and to be drawn too deeply into seeing the future of publishing as one format versus another. Before there was an ebook market, Amazon deep-discounted print books to grow market share, and it has continued to prioritise growth in market share in the ebook market, using low prices as a powerful tool. While it is possible to speculate about the future trajectories of the ebook and paper book markets, many confident pundits have been wrong before, as new factors have emerged that have significantly impacted reader behaviour and sales patterns. From the practical perspective of writers wishing to connect their work with readers, it is prudent to see both paper and ebooks as significant for any book-publishing project in the present and near future, and to develop strategies to meet both of them. It is also prudent to look beyond both platforms to another, one that had long been regarded as a peripheral player: audiobooks.

## Audiobooks

In their discussion on the stalling of the ebook in the first years of the twenty-first century, Joseph Esposito, Charles Levine and Richard Guthrie expressed a range of views about audiobooks. Esposito could see a role for them, saying, ‘Audiobooks add value (the ability to engage a book when you can’t use your eyes, as when you are driving or exercising)’ (Esposito et al 2007: 52).

Guthrie identified what he saw as limitations of both the form itself and its market, adding:

Audiobooks will never go mass. With fiction alone, reader-discovery of a writer’s voice is short-circuited by actors playing that role. Audiobooks grew fast, then levelled off just as fast in the late 1980s, early ‘90s – an LA-styled fad for the intellectually lazy, for listening to expurgated novels while cruising in their convertibles. (Esposito et al 2007: 52)

Levine, though, could see technology creating at least some opportunities for the audiobook market to grow:

Audiobooks indeed are a smart alternative way to “read” when eyes and hands are occupied. Frankly, I am surprised that audiobooks don’t account for more than 6 to 8 percent of the US trade book market. I imagine that as text-to-voice technology gets much better and cheaper, and we will be able to download an audio version of any desired book or chapter quickly and easily, then audio sales will go up. Maybe they will even double over time to peak around 15 to 20 percent of trade book sales. But audiobooks don’t threaten, and never will, the core business of print publishing the way that ebooks and ereaders unmistakably will. (2007: 53)

At the time of Esposito, Levine and Guthrie’s discussion, digital audiobooks were beginning to take their place in the market, but perceptions of the audiobook had not yet shifted from that of the 1990s, when Sarah Kozloff observed that the audiobook was viewed as ‘a debased or lazy way to read, with connotations of illiteracy ... passivity ... and lack of commitment’ (Kozloff 1995: 83). With perception already against it, the audiobook market at that time had been further limited by technology and price. An audiobook in the 1990s was relatively cumbersome, compared with a paperback novel, and cost several times as much. The dominant audio platforms were cassette tapes and CDs and, as Matthew Rubery points out, an unabridged audio edition of Tolstoy’s *War and Peace* takes up 119 vinyl records, 45 cassette tapes or 50 CDs but, in the twenty-first century, can be available as a single weightless MP3 file, downloadable across multiple platforms (Rubery 2011: 9).

By the International Rights Directors Meeting at the Frankfurt Book Fair in 2007, audiobook developments were the subject of significant discussion, as reported by Edward Nawotka the following year:

Digital audiobooks are proliferating thanks to the emergence of new “hybrid digital” players such as Iofi and Playaway – which offer individual audiobooks in their own players, as well as companies like Audible.com which took downloadable audiobooks to a mass market audience by selling them on Apple’s iTunes (Amazon.com bought Audible.com for \$300 million worth of stock in January 2008). The US audio market was now worth approximately one billion US dollars – with 14% coming from digital downloads. (Nawotka 2008: 125)

While Playaway is still in business almost a decade later, and still selling audio devices with pre-loaded product, and audiobooks are still available on CD, digital downloads offered far more scope to grow audiobook use. Winfried Schulz pointed out in 2004 that ‘media use is woven into the fabric of everyday life’ (Schulz 2004: 89) and this observation has become only more relevant in the years since. With escalating smartphone and tablet use, many people have come to regularly carry a device that makes audiobooks not merely more accessible, but easy to use. Coupled with significant improvements in affordability, barriers to audiobook use have been much reduced. As Iben Have and Birgitte Stougaard Pederson point out, ‘The new portable and digital audio media change the act of reading, moving it into fields of social practice such as exercising, commuting, and housekeeping in which reading has not previously been common’ (Have & Stougaard Pederson 2013: 125). A 2016 survey commissioned in

Australia by Audible bears this out, reporting audiobook users listening to audiobooks during commuting (49% of users), road trips (44%), housework (38%) and exercise (30%) (Clark 2016).

Importantly, Have and Stougaard Pederson are not ascribing this change to audiobooks in earlier formats, but to the evolution to formats that, specifically, are portable and digital. Both audiobook use and the groups of people using audiobooks have seen a dramatic expansion and, with this, there has been a further shift from the historic view that audiobooks were primarily for children and people with print disabilities to a point where audiobooks are not only used by readers more broadly, but where they are also extending the reach of reading into groups among whom it has not been a common practice. Furthermore, the features that set digital audiobooks apart have positively changed perception and status of the audiobook (Have & Stougaard Pederson 2013).

In the US, audiobook sales increased by 22% from 2011 to 2012, consistent with the double-digit annual growth seen for several years, with much of the growth attributed to the digital transformation of audiobook recording, delivery and use (Kaufman 2013). The Association of American Publishers reported audiobook sales growing by 31% from the first half of 2014 to the first half of 2015 (Bluestone 2015). In 2015, 1.6 billion hours of content was downloaded from Audible worldwide (Bochner 2016). Also in 2015, Montgomery reported that, in the UK, 'anecdotal evidence from publishers suggests that audio is the only segment of trade publishers' businesses that consistently delivers double-digit growth' (Montgomery 2015). In the US, digital audiobook sales rose 35.3% from the first quarter of 2015 to the first quarter of 2016 (Alter 2016). From its Australian launch in 2014 to early 2016, Audible reported 'triple-digit growth' in sales (Jennings 2016). From 2011 to 2016, Australian audiobook company Bolinda's sales quadrupled (Jennings 2016). Audible's Matthew Gain identified the growth in audiobook sales as coming from people in the habit of using their phones to consume digital content, and whose reading was limited by time constraints (Clark 2016).

As audiobooks themselves were evolving, a potential new audience for downloaded digital audiobooks, and therefore a potentially powerful driver of audiobook reading, was being created through the rise and evolution of podcasting. Though podcasts arose completely unrelated to audiobooks – as downloadable 'broadcasts' of audio content for the 'iPod' and similar devices, often themed and typically as part of a series – the evolution of audiobooks into downloadable audio files has brought the consumer's experiences of the two closer. The growing popularity of longer-form podcasts – downloads of Richard Fidler's 'Conversations' show on ABC radio, each around fifty-three minutes in length, hit one million per month by June 2015 (Bodey 2015) – has contributed to this convergence too. While they have remained largely separate at the level of production and somewhat separate at the level of distribution, the comparabilities in use of audiobooks and podcasts have potentially created a new market for audiobooks.

### Enhanced ebooks and future formats

Just as the printed book evolved over the second half of the fifteenth century, so the ebook is evolving now. Early converts to the Kindle and iPad were offered the comfort of an experience akin to reading a paper book, but under glass. This ebook was convenient and transportable, but the medium's real potential was only beginning to be explored. This exploration was advanced by the development of the enhanced ebook, an ebook providing text content and augmenting it – and the consumer's experience of it – through the addition of other material in a range of digital formats.

In 2010, the first releases of enhanced ebooks by a number of major trade publishers prompted significant debate. A market for books with extra features was long established, with Dominique Raccach, publisher and owner of Sourcebooks, explaining the background of her company's move into enhanced ebooks by saying, 'We sold more than four million physical books with CDs, so we know that there is an interest in meshing text with audio and video' (Trachtenberg 2010: B5). With ebooks often less profitable than paper books, publishers were looking to see if added content might allow a significantly higher price point and higher return. Ana Maria Alles, publisher of HarperMedia, contended that, 'when both digital editions are available, and consumers are given the choice, in half the cases they'll pay more for extra content' (2010: B5).

The type, extent and cost of that extra content, though, can vary dramatically, with the cost having significant implications for what, and who, might be published in enhanced ebook form. According to Curtis Brown's Karolina Sutton in 2010, 'Very few authors will merit that kind of investment. It will polarise the publishing industry – there will be the superbrands and the authors that get this kind of treatment' (Jones 2010: 8).

Some ebooks might be minimally enhanced, with minimal effort and expense. Some have the scope to become a vast interactive entertainment experience, produced at significant expense and pushing the boundaries of the definition of a book. Enhanced ebooks can include audio files (including music), video files, archival material, background material from the author, interviews with the author and experts, and web links to other content. Material can be formatted to allow the reader to click to change the page view from the set font to the font of the author's typewriter to the corresponding manuscript page, with the author's and possibly editor's hand-written annotations. There is scope for interactivity, both within the ebook in forms including puzzles and games, and beyond it, with the reader interacting with other participants in a web- or cloud-based world that develops around the work.

While the medium is still early in its evolution, some publishers are prepared to devote resources to it. In 2013, Richard House's four-part novel, *The Kills*, released both as a hard-copy edition and an enhanced digital edition, was longlisted for the Man Booker Prize, with the work itself and its acclaim generating discussion about the enhancements. According to the *Guardian's* reviewer:

the digital edition is far and away the better way to read this novel; the first two books in particular are augmented by a series of short films embedded on the page, often with text overlaid, as well as animations and audio clips... This is the first time I've read a digital edition of a primarily text-based novel where I've thought: yes, this works. (Pullinger 2013)

Despite *The Kills* and some other enhanced ebooks receiving acclaim, both as novels and for what the enhancements add to the reading experience, the enhanced ebook has yet to capture a significant share of the book and entertainment markets. By 2013 it had been 'pronounced dead several times' (Rankin 2013), but this is similar to the development trajectory of the standard ebook in its early years. According to Calvin Reid, 'Although multimedia ebooks have found some traction in the children's market, enhanced ebooks and apps have had problems in the broader marketplace' (Reid 2016). Reid's article, though, was entitled 'New Tech Company Looks to Reimagine Enhanced Ebooks', and it is worth recalling that, in 2007, when ebooks seemed to have few prospects, Amazon reimaged the ereader, captured the public's attention and saw ebook sales soar.

In the longer term, the enhanced ebook is likely to push the boundaries of what a book is to such a degree that it will call for the book to be defined anew, and make it a challenge to know where to set the limits. This will parallel other developments in the ways we create and use narrative. Videogames – a booming sector of the entertainment market – will push the boundaries of book definition from the other side, by incorporating more narrative and more character depth. More people will participate in web-based wikenarratives such as *The Holders* and *The SCP Foundation*, in which self-selected reader-participants respond to stimuli, existing narrative strands and sometimes set parameters to build a story. Transmedia storytelling will continue to grow. The owners of blockbuster franchises see revenue prospects in exploiting intellectual property across as many platforms as possible and, away from their high-budget models, the Internet and ease of access to technology set the bar low for entry, allowing the proliferation of fan fiction, playvids (where players record their playing of a videogame and commentary, and upload the recording), unboxing videos and more. The rise of social media has altered the connectedness of consumers, creators and consumer-creators, influencing not only sales of existing products but the pool of people who might opt in and contribute to developing narrative in participatory platforms.

Wherever the boundaries lie, hybrid digital products that spring from books, embrace text at the heart of their way of operating and require the work of writers are likely to become more common and will compete with books as we know them.

## Beyond sales-figure debates

While the debate about sales figures and format supremacy has been an ongoing distraction – at times a preoccupation – for some writers, justifying a close review of the underlying evidence, for the writer, as well as the publisher, the ebook and other new formats have also presented other significant issues requiring consideration. The ebook has made self-publishing easy and cheap, and given the self-published author access to a global market, but a global market that offers millions of titles. Some breakthrough authors have sold in huge numbers, but far more have found themselves in the long tail that Garrison Keillor called ‘the future of publishing: eighteen million authors in America, each with an average of fourteen readers, eight of whom are blood relatives. Average annual earnings: \$1.75’ (Keillor 2010).

Furthermore, some genres seem more successful than others as ebooks. One of Ben Arogundade’s ‘Ten Steps to Ebook Success’ in his article of that name is ‘Get Genre Right’. He lists thriller, mystery and romance as the most popular ebook categories (Arogundade 2012). Andrew Wilson’s assessment is broadly in agreement: ‘Genre novels – particularly crime thrillers, fantasy, paranormal romance and chick-lit – seem particularly suited to the Kindle format’ (Wilson 2011). In 2013, Random House and Harper Collins in the US set up digital-only imprints specifically to publish genre fiction, with imprints for mystery, romance and speculative fiction. According to Allison Dobson, Random House digital publishing director, ‘The genres were among the first where readers took to the digital format, and the ratios of readers of digital, as opposed to physical, are much much higher’ (McMillan 2013).

Jan Zwar, David Throsby and Thomas Longden’s detailed survey of Australian authors provides more evidence to support claims about the relative success of genre fiction in the digital domain. While 60.7% of literary authors surveyed had seen technology change the way their work is published, the same was true of 84% of genre fiction authors, with the research identifying ebook uptake by genre fiction consumers as a contributing factor (Zwar, Throsby & Longden 2015b). Genre fiction authors were also more likely to report favourable changes in financial circumstances due to industry changes, and literary authors more likely to report a deterioration (Zwar, Throsby & Longden 2015a).

British author Stephen Leather suggests one factor behind the strength of genre fiction in the ebook market is that readers in the genres popular as ebooks tend to read more than other readers (Wilson 2011). US Harper Collins publisher Liat Stehlik agrees. ‘Genre fans, she says, became “early adopters” of the digital format because ebooks are the optimal format “for people who want to read a lot of books”’ (McMillan 2013). With Hui Li demonstrating that avid readers are substantially more likely to e-read – his modelling predicted a Kindle penetration rate of 38% among US avid readers by the end of 2012, compared with 2.2% for general readers (Li 2015: 47) – if Wilson and Stehlik are correct, it is possible that avid readers of genre fiction have driven sales of genre titles in ebook markets such as the Amazon Kindle Store, perhaps encouraging authors to write and publish in the Kindle Store in those genres.

It is also evident that the enhanced ebook suits some genres more than others. The Economist makes a case for the benefits of enhancements in the areas of children’s picture books, adult non-fiction, newer forms of interactive fiction and literary classics – such as Penguin’s enhanced ebook edition of *On the Road*, featuring images of Kerouac’s original scroll manuscript, photographs of Kerouac and other significant Beat figures, video interviews and maps of the journey taken in the book (Kerouac 2011) – but says, ‘adult fiction has proven a harder sell. Few readers have been willing to pay more for extras at the back’ (Economist Group 2012).

Piracy of ebooks is also a concern, and may increase as an issue for audiobooks. In some cases, ebook piracy has led to a questioning of the viability of ebook markets in particular languages, for example, according to the *Global Ebook Market* report of 2013, ‘at least 90% of available Russian ebooks come from pirates; under such circumstances, a solid ebook market can hardly take shape’ (Wischenbart 2013: 3). The report found Chinese ebook publishing was also very significantly affected. In a number of languages, including English, writers face piracy while at the same time participating in a viable and potentially lucrative legal ebook market, with Ruediger Wischenbart finding that ‘many authors who do not have a regular income other than from their writing have good reason to be worried’ (Wischenbart 2013: 3).

The impact of piracy, though, is not easy to quantify, and other measures have yielded results that support a less pessimistic view. The UK Online Copyright Infringement Tracker studied the habits of British Internet users for three months in 2015 and found that, during that time, 9% consumed at least some music illegally, 6% at least some film content illegally, and only 1% consumed at least some book content illegally. Among consumers of particular genres, 10% of book consumers consumed at least one item illegally, compared with 26% of music users and 25% of film users (Mackay 2015: 3). In response, Richard Mollet of the Publishers Association suggested that legal ebook convenience and availability saw publishing less affected than other sectors (Flood 2015). The assessment of the impact of piracy is further complicated by ubiquitous fake piracy sites that harvest ebook covers, data and metadata and use them as bait to drive advertising revenue, insert malware, or obtain personal information or payment, rather than to give away pirated books (Bailey 2016; Hoffelder 2016).

Beyond these issues, new platforms for storytelling and technologically-driven changes in access to audiences have provoked debates about the relevance and roles of editors, designers and agents, and the entire publishing structure that had arisen around the printed book. For some writers, and even some publishers, it is sometimes too easy to see technological changes as a perplexing threat rather than a perplexing opportunity.

## A multi-platform approach

Writers are creators of stories, not of the vessels they come in. Once stories are fed into the machinery of the book industry, they emerge in one form or several: paper books, audiobooks, ebooks and enhanced ebooks. While some commentators and even industry players at times behave in a way that suggests one format is being pitted against another, it is prudent for the writer and publisher to resist this, and to develop a publication strategy across platforms, as befits each work and its possible audience.

The paper book has not been replaced or turned into a niche product, and most publishers who publish on paper are likely to continue to do so for the foreseeable future, but the design, manufacture and prospects of each paper edition need to be considered in the context of the same material being simultaneously released on other platforms, often at different price points. Drawing on the lessons of the past seventeen years, it is likely that the claims that we have hit ‘peak ebook’, like many other claims about publishing this century, are an over-extrapolation. From the enhanced ebooks that have appeared so far during the form’s short history, all we can be sure of is that this platform is still evolving. What will an ebook be twenty years from now? What will a book be?

When Allen Lane began the paperback revolution by setting up Penguin Books in 1935, the industry saw its potential, embraced it and capitalised on it. The paperback had come from within the industry, used existing technology in a slightly different way and allowed expansion of existing retail channels. In that instance, publishers were dealing with an evolution that was immediately comprehensible and adapted existing practices.

The development of ebooks and other digital reading technologies has been very different. Early ereading devices were developed not by long-established publishers but by technology companies, and the breakthrough ereader, the Kindle, was the work of an Internet retailer whose model was already seen as posing a significant threat to business as usual. Compounding this, and also unlike the situation that had occurred with paperbacks, the distribution and sales model that developed for ebooks (and other digital platforms) necessarily had very little in common with the model used for print books – each copy of a book in a digital format takes up no space, requires no warehousing or physical point of sale and does not exist until it is purchased. Rather than simply being a different and convenient device for carrying stories to readers, the ebook arrived as an awkward ‘other’ that, as soon as it moved in from the margins, revealed itself as a disruptor of existing practices and markets.

To this environment, add more calls on recreational dollars and time than existed just a few years before – books had survived cinema, radio and television, but could they survive Facebook, YouTube and Netflix? – a Global Financial Crisis curtailing recreational spending (almost certainly

including spending on recreational reading) and recency bias, and it is perhaps no surprise that a dramatic surge in ereading has been extrapolated by some to mean the end of days, and a plateau extrapolated to mean the war might be over. Neither of these is accurate, or helpful.

When new storytelling media have evolved, they have added to the options for consumer-readers, rather than the supersessionist notion of new media wiping out old – an idea Paul Duguid warned of more than twenty years ago, before the development of most formats discussed in this paper (Duguid 1996). Opportunities have evolved that allow creators to bypass existing systems, and those systems have been required to adapt. In an era in which anything can be published anywhere, in any state of readiness, established publishers have marketing power (for the titles with which they choose to use it), a deep knowledge of the still-substantial paper-based publishing industry, a significant presence in the ebook market and brands they can leverage – brands that say a selection process of some rigour has occurred, an investment has been made in an author, and editors and others have added value with the aim of optimising the reading experience. Potential purchasers will value that as they may. Some writers will act without agents, and some will see agents as adding value, connecting them with key players in a rapidly evolving environment, and bringing an understanding of how a writer's intellectual property, or contribution to the creation of intellectual property, might best be handled in a world in which both book markets and the range of storytelling platforms are more complex and less static than they once were.

For the writer, the book industry in the twenty-first century is no longer a single-platform proposition. By examining a project's prospects across platforms, the writer can maximise the pathways to readers and achieve worthwhile synergies. For example, simultaneous release across platforms can lead to increased total marketing spend and greater penetration of the project, a high profile narrator for an audiobook can increase media coverage that benefits all platforms and social media discussion about the project in one format increases awareness and recognition of the project across all. By cutting through the noise of ongoing debate around the notion of an inter-platform rivalry and accepting that the best way to reach readers is to maximise a work's potential in any platform available to it, and to operate those platforms synergistically and strategically, the writer at this point in the twenty-first century maximises their chances of connecting broadly and in a compelling way with a readership.

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