

UNIQUELY PORTABLE MAGIC: TRENDS IN THE DEVELOPMENT OF E-BOOKS AND E-TEXTBOOKS IN KAZAKHSTAN

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ABSTRACT

This article aims to identify the preferences of the net generation readers in print and electronic media activities and to investigate the impact of e-books on the printed books, and try and see E-book market in Kazakhstan. The volume of the Kazakhstani overall book market is much smaller in comparison with the Russian market and largely occupied the books published abroad occupy a large part of it. The stratified random sampling technique was employed for selection of participants. Comparing readers' preferences between reading a printed book and electronic media, it seems that e-book Growth is slowing, but still substantial, and the majority of book readers believe that e-books will become more popular than the printed books in the future.

Keywords: E-book market, Kazakhstan, printed books

Introduction

E-books are versions of conventional printed books presented in various digital formats. They started to gain popularity with the proliferation of personal mobile devices such as smartphones, tablets, and other electronic reading devices. Before that, e-books were tied to desktop computers, which made them even less mobile than regular paper books.

E-books have many advantages over their paper counterparts. They do not take up physical space, and the number of books one can possess at the given point of time is limited only by the memory of the device. They can be purchased and downloaded almost instantly with no additional visits to physical bookstores, and they cost significantly less than traditional books. Advances in technology have made it possible to include many additional functions in e-books, such as keyword searches and built-in dictionaries. Moreover, many digital educational materials include audio and video illustrations and hyperlinks to other sources further advancing their educational capabilities.

Due to these factors, various discussions have arisen in the media about whether e-books can completely displace paper books from the book market. However, after the initial boom in popularity, the trend towards paper books resumed in developed countries. Even during the 2020 pandemic, while many physical bookstores remained closed for the most part of the year and publishers delayed planned releases of new titles, sales of paper books rose 7% [1].

However, pandemic-induced lockdowns also induced the popularity of e-books, their sales were still ahead of physical books staying in double digits. Nielsen Book Research's Books &

Consumers Survey has revealed that e-book sales rose 16% year on year in 2020 to their biggest total yet, in a record year for book sales in general [2].

This trend also holds true in the emerging markets even before the pandemics. For example, in the period from 2013 to 2018, the volume of the Russian e-book market has grown from 420 million rubles up to 2.7 billion rubles [3, 39]. According to the statistics of the Russian Book Chamber, in the same 2018 in the “LitRes” online bookstore alone, the number of downloads of electronic and audiobooks amounted to 11.5 million copies, which is about 45% more than in 2017 [4, 53]. However, despite the growth in the number of e-books on the Russian market, their share is still less than a tenth. At the end of 2018, the share of e-books was 6.7%, audiobooks account for only 1.2%, and the share of printed books was 92.1% [3, 39].

It should be noted that assessing the e-book market in developing countries could be a difficult task because most users have the ability to download books free of charge in various formats or read them online from open resources such as loveread.ec. Also, many books, including new titles, are freely available on social networks, among which vk.com remains the most popular resource. This social network is known for its wide selection of free entertainment content, from movies to music.

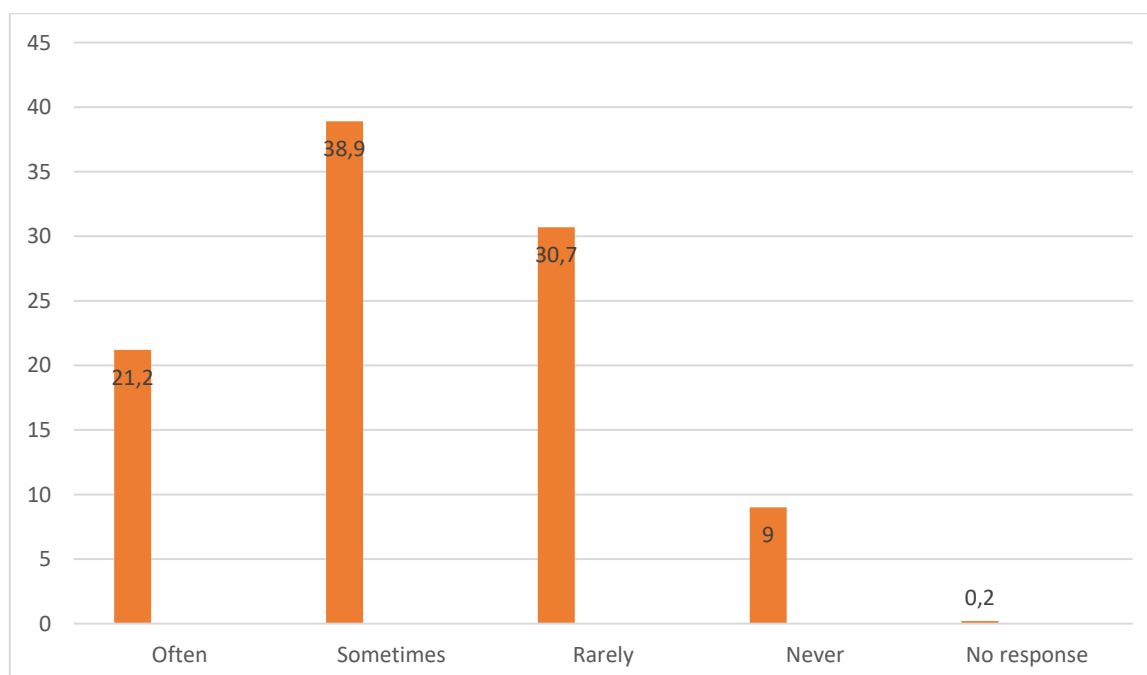
E-book market in Kazakhstan

The volume of the Kazakhstani overall book market is much smaller in comparison with the Russian market and largely occupied the books published abroad occupy a large part of it. According to the state program "Reading Kazakhstan," the share of Russian publishing houses in the Kazakhstani book market could take from 65% to 90%, and that of Kazakhstani publishing houses only accounts for 10-35%. This indicator is the highest in the fiction segment, where the share of books published in Russia is around 90% [5]. These numbers are not surprising since most of the Kazakhstani audience is bilingual and many books do not require further translation or adaptation. This puts Russian publishing houses in an advantageous position; they use economies of scale to drive down the cost of printing paper books. Circulation of books printed in Kazakhstan rarely exceeds 2-3 thousand, making them more costly.

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It is difficult to assess how much Kazakhstanis read. Various surveys and studies show different levels of reading engagement across the population. For example, research conducted by the Friedrich Ebert Foundation, *Youth in Central Asia: Kazakhstan*, came to the conclusion that reading books is not an interesting form of spending free time for young Kazakhstanis, the prevailing share of young people, which is 78.6%, rarely or does not read books or magazines at all. Only every fifth respondent answered that he reads books often. Researchers interviewed 1,000 respondents aged 14 to 29 years in 14 regions of Kazakhstan, the cities of Astana and Almaty [6, 17]. The engagement of young people in reading is an important factor to consider because they might be the focal audience who might drive the growth of e-books share in the market. They easily adapt to new trends and information mediums in comparison to older audience.

Figure 1. Reading books/magazines among youth in Kazakhstan

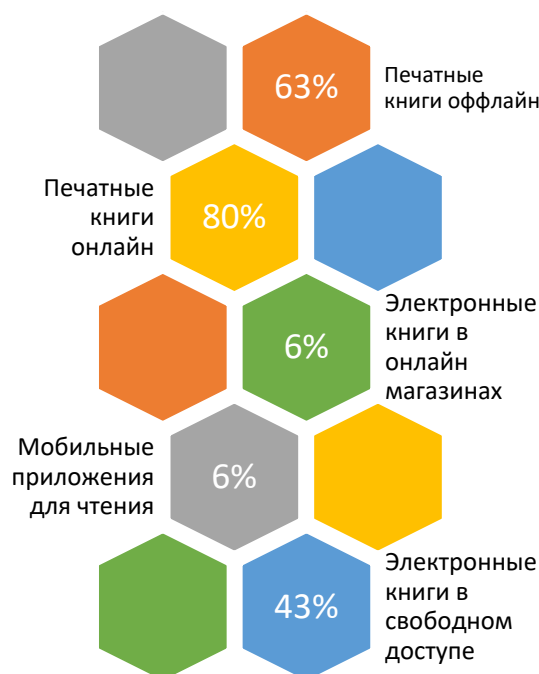


Source: Friedrich Ebert Foundation Kazakhstan, 2016

Different study from 2019 found that 67% of men and 77% of women reported that they bought at least one book in the past year. Only 6% of respondents answered that they buy e-books from online stores. Another 6% prefer dedicated mobile reading apps. And 43% of the respondents admitted that they read e-books in the public domain or from open sources [7]. However, since the study data is self-reported, the number of people illegally downloading books might be even higher.

Figure 2. Formats and ways in which books are purchased in Kazakhstan

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Source: Picodi.com

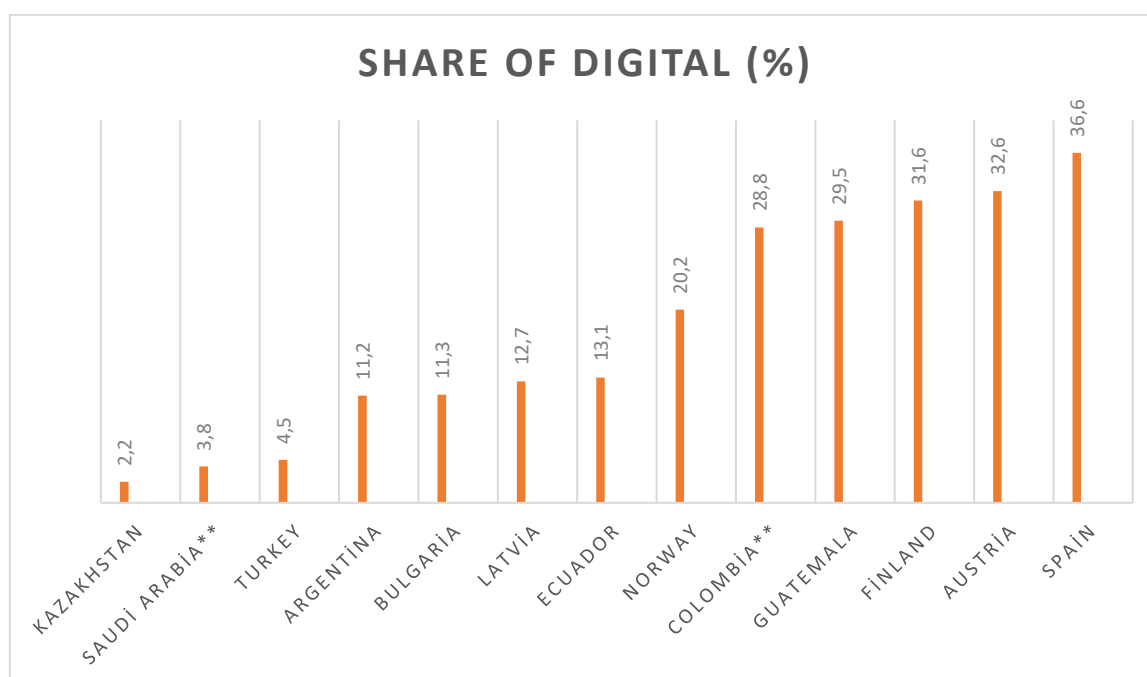
However, these figures may change significantly in the future, because the e-commerce market in Kazakhstan is undergoing significant changes. According to PwC Kazakhstan, in the first nine months of 2020, the volume of the retail e-commerce market grew by 93% compared to the same period in 2019 (from 198 billion tenge to 382 billion tenge) [8]. During the lockdown period, many

Kazakhstanis tried online shopping for the first time. Retailers also had to migrate to online platforms. This might have a trickledown effect on e-book sales in the future since more users have experienced online transactions. Despite these changes biggest online book retailers such meloman.kz and flip.kz do not sell e-books, forcing users to seek out foreign online booksellers.

E-textbooks in Kazakhstan

The segment in which Kazakhstani book publishers are confidently leading is educational literature. According to The Global Publishing Industry in 2018 report, the total number of published titles covering trade and education in 2017 was 6,515, of which 2,398 books were devoted to education. The report also indicates that the share of digital format among the titles by the educational sector was only 2.2% [9, 14]. This figure is much lower in comparison to countries like Austria or Spain, where the share of digital educational publications was 32.6% and 36.6% respectively.

Figure 3. Distribution of digital titles published by the educational sector, 2018



**indicates 2017 data

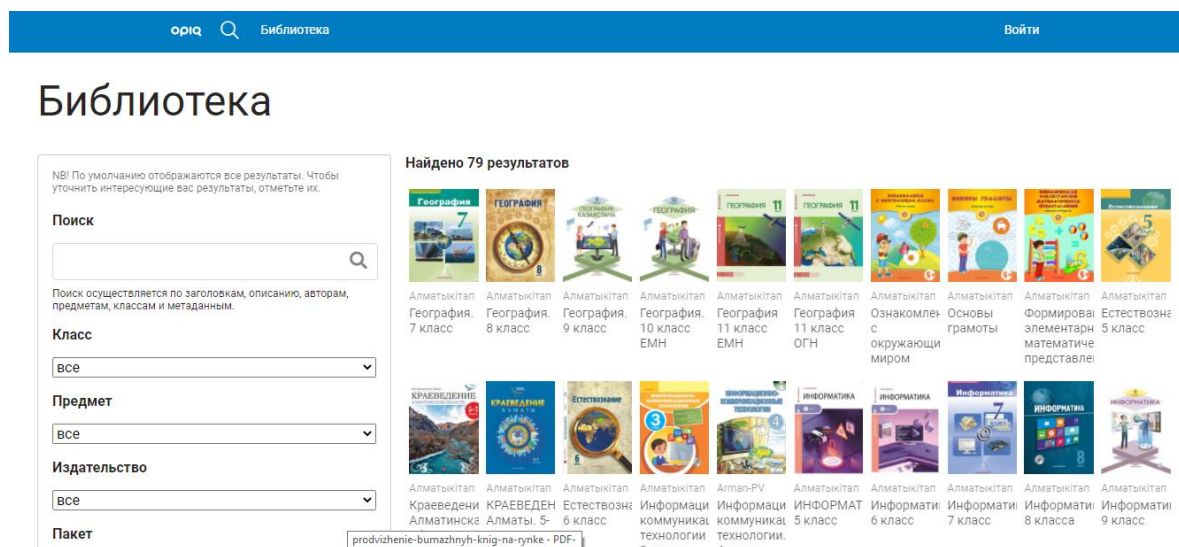
Source: WIPO Statistic Database, 2019

However, one should take into account the fact that the Ministry of Education of the Republic of Kazakhstan only in 2016 placed electronic textbooks on its website as part of the implementation of the updated educational content. A pilot project for the integration of electronic textbooks into the educational process was launched by the publishing house "Almatykitap" in 2015. More than 350 teachers and 1000 students took part in the project in 12 schools in the cities of Nur-Sultan and Almaty, as well as in Karaganda, Turkestan, Zhambyl, and Almaty regions [10]. All "Almatykitap" textbooks were posted on the electronic platform opiq.kz. This is the platform developed by the Estonian company OPIQ, which is used in most of the Estonian basic and upper secondary schools.

The platform integrates all the advantages of e-books such as photo, video, audio, interactive tasks into the reading materials. There is an easy-to-navigate system between the paragraphs of textbooks; and at the end of each lesson, there is an interactive task "Test yourself". The tasks include tables, graphs, questions and tasks that will require practical activity. In the "More on this topic" section, additional materials are presented, where all the material is systematized into three categories: the same topic earlier on the same subject; later on the same subject; the way it is presented in other subjects. To be able to access the tutorials, users need to have an account.

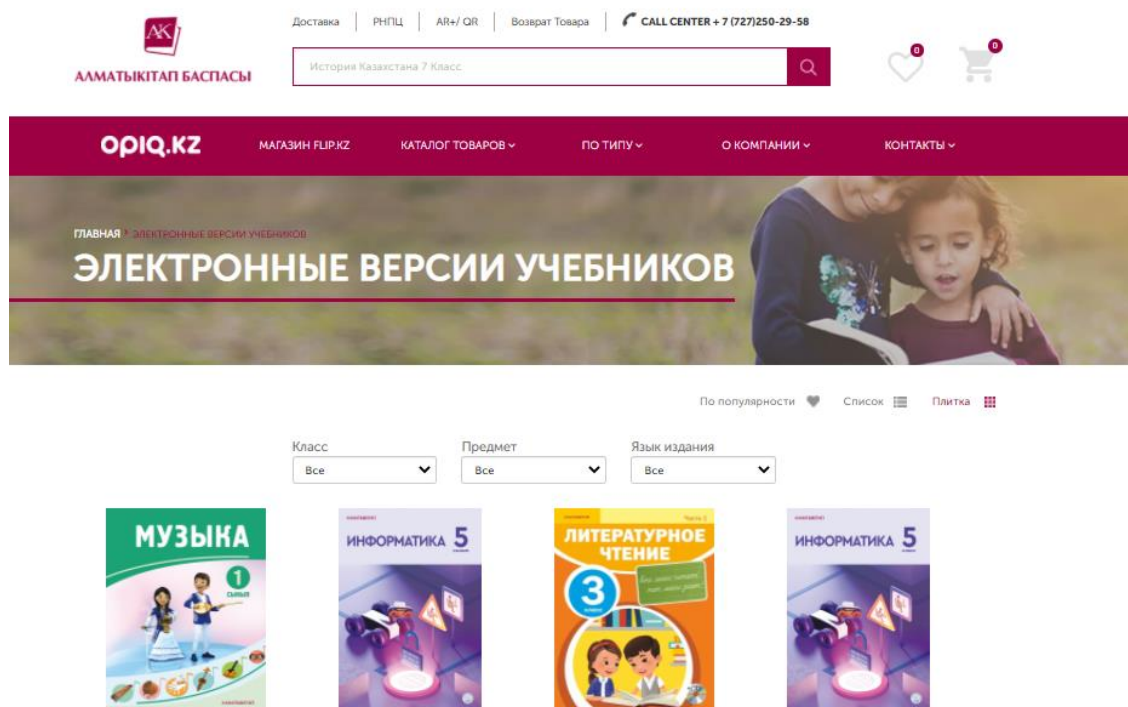
Currently on the opiq.kz platform, there are 75 textbooks in Kazakh and Russian languages. Mostly, these are "Almatykitap" textbooks, but the platform also includes textbooks from other publishing houses such as "ArmanPV" and EduStream. In the future platform may contain even bigger amount of content approved by the Ministry of Education.

Figure 4. E-textbooks layout on OPIQ platform



"Almatykitap" textbooks are also available on the website of the publishing house. However, these books are simply digitalized versions of paper textbooks with no additional functionality. Every page has publishing house watermarks and is more suitable to be preview materials than actual textbooks.

Figure 5. E-textbooks layout on Almatykitap website



One of the advantages of electronic textbooks, which has always been noted that their use can significantly lighten the backpacks of students, thereby reducing their physical stress. But opponents of the digitalization of textbooks argued that students will be forced to spend more time behind the screens of computers and other mobile devices. It was also noted that for the introduction of such textbooks, it is necessary to additionally train the teaching staff in education methods using digital materials [11].

However, the global pandemic of 2020 radically changed the situation with the use of electronic textbooks in Kazakhstan. All educational facilities had to switch urgently to distance learning; and projects for the introduction of electronic textbooks turned from pilot to full-scale. In an environment where learners are not always able to receive instant feedback from teachers, the additional functions of digital textbooks are becoming especially important. According to opiq.kz developers, the number of platform users already exceeds one million [10]. And this might induce further development of e-textbooks and digital educational materials in Kazakhstan.

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