

Publishers' Development Strategies in Response to Changes in National Reading—Analysis Based on the 16th to 20th *National Reading Survey Report*

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Since 2014, nationwide reading has been included in the government work report for 10 consecutive times, and twice into the country's five-year development plan. The importance of reading for individuals, society, and the country has become increasingly prominent. National reading has flourished, and throughout the 2018 to 2022 *National Reading Survey Report*, there have been welcome changes in national reading in China. This study compares and analyzes the relevant reading indicators of adult nationals from 2018 to 2022, and summarizes the five changes and new trends in national reading. That is, national reading awareness has increased, paper-book reading habits have returned, digital reading has become more diversified, the listening group has grown, and the voice of national reading activities has continued to rise. Accordingly, it provides relevant development strategies for publishers.

Keywords: nationwide reading, *National Reading Survey Report*, publishers, digitization, development strategies

Introduction

In recent years, the Party and the government have continuously deepened the importance of nationwide reading and elevated it to the level of a national strategy. In 2023, nationwide reading was included in the government work report for the 10th time. From 2022, the government work report on nationwide reading has changed from “advocating nationwide reading” for many years to “promoting nationwide reading” (The State Council of the People's Republic of China, 2022). The word “advocate” expresses hope, while the word “promote” is a request (Nie, 2022). During the 13th Five-Year Plan period, the *13th Five-Year Plan for National Economic and Social Development* proposed “vigorously promoting nationwide reading” (The State Council of the People's Republic of China, 2016), emphasizing the normalization and standardization of nationwide reading, and steadily improving nationwide reading. During the 14th Five-Year Plan period, the *Outline of the 14th Five-Year Plan for the National Economic and Social Development of the People's Republic of China and the Visionary Goals for 2035* clearly stated that “we will further promote nationwide reading, and build a ‘scholarly China’” (The State Council of the People's Republic of China, 2021). On April 23, 2022, the first National Reading Conference was held in Beijing, and President Xi emphasized in his congratulatory letter that he hoped the whole society

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would participate in reading, and form a strong atmosphere of love for reading, reading good books, and being good at reading (Xi, 2022). This is not only a call for national participation in reading, but also a spur to the publishing industry to publish quality works.

Since 1999, up to April 23, 2023, the China Academy of Press and Publication has continuously organized and implemented 20 National Reading Surveys. After 2009, the *National Reading Survey Report* changed the frequency of biennial releases to annual releases. Against the background that nationwide reading has been upgraded to a national strategy countless times, this paper analyzes the data related to the 16th to 20th *National Reading Survey Report*, reveals the changes and new trends in nationwide reading in the past five years as nationwide reading has become increasingly deepened, and discusses how publishers can respond to the call of “promoting nationwide reading”.

Analysis of Reading Indicators

Important reading indicators in the *National Reading Survey Report* for the past five years were selected, and the data on the results of each indicator, such as the comprehensive reading rate of adult nationals, the reading rate of each medium, the amount of reading, the preferred form of reading, the rate of listening to books and the medium for listening to books, and the satisfaction of reading, were comparatively analyzed.

Combined Reading Rate and Reading Rate by Medium

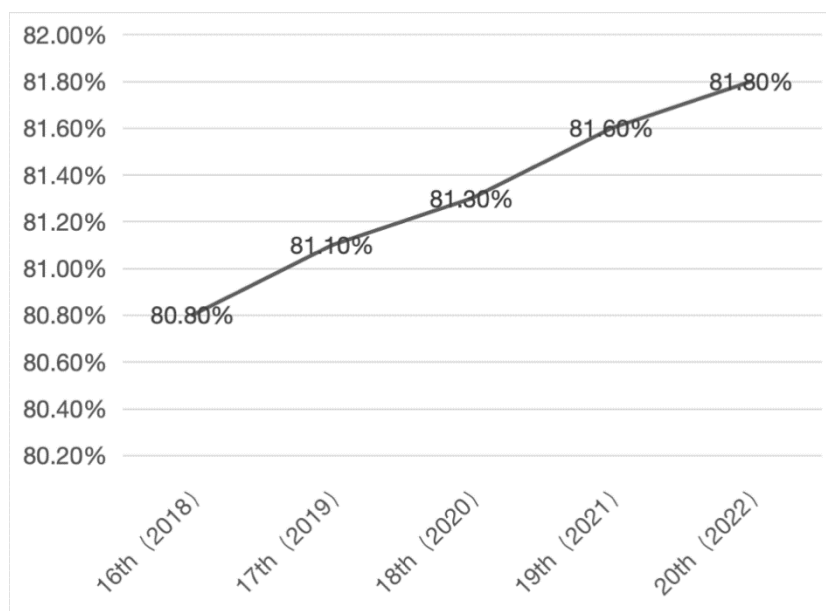


Figure 1. Combined adult national reading rate, 2018-2022.

As can be seen from Figure 1, the comprehensive reading rate of nationals in all media has been on the rise in the past five years, which is greatly related to the national emphasis on nationwide reading. Mainstream media have publicized nationwide reading through various channels. Graphic and video posts of book recommendations and reading sharing have appeared frequently on we media and streaming media platforms. The national reading campaign has reached more nationals in more regions under the promotion of the state and the government. In the atmosphere of building a book-scented society, national reading awareness has been awakened, and more and more people are participating in and attaching importance to reading.

Table 1

Adult Nationals' Reading Rates by Medium, 2018-2022

Order of national reading surveys	Book reading rate	Digital reading rate	Newspaper reading rate	Journal reading rate
16th (2018)	59.0%	76.2%	35.1%	23.4%
17th (2019)	59.3%	79.3%	27.6%	19.3%
18th (2020)	59.5%	79.4%	25.5%	18.7%
19th (2021)	59.7%	79.6%	24.6%	18.4%
20th (2022)	59.8%	80.1%	23.5%	17.7%

Table 1 presents the details of the reading rate of each medium over the past five years. Overall, the reading rate of newspapers and journals has a clear downward trend; the reading rate of books shows a year-on-year growth trend, accounting for about 60%; the digital reading rate grows year-on-year, with the largest increase in 2022, and the digital reading rate accounts for the highest percentage of the reading rate of each medium. The rise in the digital reading rate is firstly due to the growth of the digital publishing industry; in 2021, the overall revenue scale of China's digital publishing industry for the whole year reached 1,276.264 billion yuan, an increase of 8.33% year-on-year (Wei, 2023). Secondly, with the development of science and technology, the popularization of hardware facilities such as cell phones, computers, tablets, etc., and the rapid development of software facilities such as the Internet, big data, cloud computing, 5G, etc., digitization has become a trend, and digital reading has the advantages of convenience, low-cost, and massive content, which is highly adapted to the way of life of people in the information age.

Amount of Reading

Table 2

Adult Nationals' Reading of Paper Books, E-books, and Combined Books, 2018-2022

Order of national reading surveys	Paper books read per capita	E-book reading per capita	Combined book reading
16th (2018)	4.67 books	3.32 books	7.99 books
17th (2019)	4.65 books	2.84 books	7.49 books
18th (2020)	4.70 books	3.29 books	7.99 books
19th (2021)	4.76 books	3.30 books	8.06 books
20th (2022)	4.78 books	3.33 books	8.11 books

Table 2 presents the situation of per capita reading in the past five years; in general, the per capita paper book reading of our adult nationals in these five years is greater than the per capita e-book reading, and the advantage of reading paper books is still relatively obvious. China's national per capita reading of paper books rose by 0.11 books in five years and the growth is relatively slow; in 2022, the national per capita reading of books is 8.11 books, but these data are still far behind the per capita reading of France, Japan, Israel, and other countries many years ago.

Preferred Forms of Reading

In the past five years, the proportion of nationals who preferred to "reading with a paper book" showed a trend of decreasing, then increasing, and then stabilizing, while the proportion of "reading with a cell phone" showed a trend of increasing, then decreasing, and then increasing again. In 2018 and 2019, the rate of those who preferred "reading with a cell phone" was higher than that of those who preferred "reading with a paper book".

And in 2020-2022, the rate of “reading with a paper book” far exceeded that of “reading with a cell phone”. Reflecting the return of the national paper book reading preference, cell phone reading has become a form of reading that should not be underestimated. From Table 3, it can also be seen that from 2018 to 2022, a certain percentage of nationals preferred “online reading” and “reading on e-readers”. From 2020 onwards, the rate of “listening to books” was increasing year by year. In 2021, “watching reading videos” became a new form of reading favored by the nationals, with a rate of 1.5%, and in 2022, the rate reached 2.8%.

Table 3

Forms of Reading Preferred by Adult Nationals, 2018-2022

Preferred reading forms Year & order	Reading with a paper book	Reading with a cell phone	Reading online	Reading on e-readers	Listening to books	Watching reading videos
2018 16th	38.4%	40.2%	12.8%	7.7%	/	/
2019 17th	36.7%	43.5%	10.6%	7.8%	/	/
2020 18th	43.4%	33.4%	7.9%	8.6%	6.7%	/
2021 19th	45.6%	30.5%	6.6%	8.4%	7.4%	1.5%
2022 20th	45.5%	32.3%	6.8%	8.1%	8.2%	2.8%

Note. As the national reading survey will be improved with the actual situation, the relevant canceled indicators are replaced by “/”.

Listening Rate and Listening Media

In recent years, the national listening rate has been rising year by year, and the national listening rate in 2022 exceeded 30%. As an emerging form of reading, the listening rate maintains a good growth momentum.

As can be seen from Table 4, the listening rate rises along with the improvement and enrichment of the listening medium. In 2017, the listening medium mainly consisted of mobile audiobook App platforms, broadcasting, and WeChat voice sending. By 2022, the national listening medium will be increasingly diversified, with a wide range of media, such as mobile audiobook Apps, broadcasting, WeChat official accounts or applets, smart speakers, audiobook readers, or voice reading machines, etc., to satisfy the reader’s needs for listening to books in different scenarios. In the medium of listening to books, mobile audio Apps, radio, WeChat official account or applet, smart speakers, audio readers or voice reading machines, and other media meet the readers’ needs in different scenes. In the medium of listening to books, mobile audiobook App takes the absolute advantage; the ratio of listening to books through radio shows a trend of decreasing and then leveling off. WeChat voice sending has been replaced with the application of a WeChat official account or applet. Smart speakers and audiobook readers have been the emerging medium of listening to books in the past three years.

Table 4

Adult Nationals’ Listening Rate and Medium of Listening, 2018-2022

Year & order	2018 16th	2019 17th	2020 18th	2021 19th	2022 20th
Listening rate					
Listening medium	26.0%	30.3%	31.6%	32.7%	35.5%
Mobile audible App platform	11.7%	16.2%	17.5%	17.9%	21.6%
Broadcasting	6.4%	6.0%	8.8%	8.9%	8.5%
WeChat voice sending	/	9.3%	/	/	/
WeChat official account or applet	/	/	10.8%	11.2%	13.5%
Smart speaker	/	/	10.4%	10.8%	10.5%
Audiobook readers or voice readers	/	/	5.5%	5.7%	5.2%

Note. As the national reading survey will be improved with the actual situation, the relevant canceled indicators are replaced by “/”.

Reading Satisfaction

Reading satisfaction reflects the degree to which nationals are satisfied with their reading needs, and reading satisfaction refers to readers' evaluation of personal reading and satisfaction with locally organized reading activities (Wu & Xu, 2017). Table 5 selects the important index of readers' personal reading evaluation in the past five years for comparison. In addition, it also compiles the voice of the nationals on locally organized reading activities.

Table 5

Adult Nationals' Reading Satisfaction, 2018-2022

Satisfaction Year & order	Individual reading evaluations			Proportion of people wanting local reading events
	Very satisfied or more satisfied	Generally satisfied	More dissatisfied or very dissatisfied	
2018 16th	26.3%	47.4%	14.6%	67.3%
2019 17th	24.4%	48.8%	14.3%	68.2%
2020 18th	27.7%	41.1%	17.1%	79.1%
2021 19th	28.2%	41.1%	16.6%	80.1%
2022 20th	26.8%	47.8%	15.4%	80.5%

As can be seen from Table 5, the rate of nationals who are satisfied with their reading increased in 2018-2019 and decreased in 2022, but overall, greater than a quarter of the nationals were satisfied. The rate of nationals who feel dissatisfied declined from 2021, and those who say they are average surged in 2022, side by side reflecting that nationals have higher expectations of their reading. Over the past five years, calls for local reading activities for all have been on the rise, and by 2022, more than 80% of nationals want local reading activities or book festivals to be held.

Changes and New Trends in National Reading

Based on the comparative analysis of the data of the *National Reading Survey Report* for the past five years on the comprehensive reading rate, reading rate of each medium, reading volume, preferred reading form, listening rate and listening medium, reading satisfaction, and other indexes, we found that the reading of the nation in the past five years has shown the following changes and new trends:

Increased Awareness of Reading, But a Small Increase in Reading per Capita

As can be seen from Figure 1 and Table 1, in the past five years, the national comprehensive reading rate has continued to rise, and the reading rate of paper books and e-books has developed positively. Combined with Table 2, it can be seen that the comprehensive reading per capita of China's nationals has grown slowly in the past five years. The government work report has written "nationwide reading" 10 times, and the 13th Five-Year Plan and the 14th Five-Year Plan have incorporated nationwide reading into the national development plan. As early as 2016, the *Regulations on the Promotion of Nationwide Reading (Draft for Public Comments)* was released, which is the first administrative regulation on nationwide reading at the national level, and nationwide reading has been guaranteed at the level of laws and regulations (Chen, Chang, & Li, 2023). National reading brands such as "Scholarly China—Shanghai Week", "Beijing Reading Season", "Scholarly Zhejiang", "Scholarly Lingnan", and "Scholarly Jingchu—Cultural Hubei" have been carried out in various places, leading to the prosperity of the local reading culture. Thanks to policies laws and regulations, the goal of building a book-scented China has become clearer and clearer, and the reading awareness of the people has gradually increased

under the influence of active reading and environmental inculcation. However, there is still a long way to go to promote the idea of reading to all people; how to awaken the reading consciousness of all people and put it into reading action? This is still a problem to be solved.

The Return of Paper Book Reading Habits and the Huge Potential of Cell Phone Reading

As shown in Table 3, in 2018 and 2019, the ratio of nationals who preferred “reading on cell phones” exceeded the ratio of those who preferred “reading with a paper book”. And from 2020 onwards, the ratio of nationals who preferred “reading with a paper book” exceeded the ratio of those who preferred “reading with a cell phone”, while the ratio of nationals who preferred reading with paper books was the highest. Digital reading does have an impact on paper book reading for a certain period, but the advantages of paper book reading will stand the test of time, and the data of these five years reflect the return of national paper book reading habits.

Cell phone reading is a product of the mobile Internet era, and its convenience can meet readers’ fragmented reading needs, but readers’ immersive reading and deep reading are still more dependent on traditional paper book reading. Therefore, we believe that paper book reading can make readers more focused, cell phone reading also has its irreplaceable convenience, the two are never who replaces who, but complement each other, and nationals should read in a variety of ways, making full use of the reading resources around. Establish a healthy “reading view” and encourage every form of reading. As Wei Yushan (2013), president of the China Academy of Press and Publication, said, whether it is shallow reading, micro-reading, fragmented reading, or cell phone reading, it is reading after all, compared to nothing to read, even if it is “micro”, “shallow”, “fragmented” also worth advocating.

The Tendency to Watch Reading Videos Continues to Rise, and Digital Reading Has Become More Diversified

Cell phone reading, e-reader reading, listening to books, watching reading videos, and other forms of reading have diversified digital reading. In 2021, “Watching reading videos” became a new form of reading for nationals. The results of the 20th national reading survey reveal that in 2022, 2.8% of the adult population will prefer “Watching reading videos”, up 1.3% from 2021 (Shuxiang Zhongguo, 2023). With the proliferation of streaming video players and video broadcasting platforms, the reading habits of the nationals have been extended to video. In terms of video output content, Bilibili stands out among many video broadcasting platforms. According to the data released by Bilibili, from 2021.04.23 to 2022.04.23, about 90.6 million people watched book-reading videos on Bilibili, with the total playback volume of such videos exceeding 5.8 billion times, and 743,000 people watched at least one book-reading video on Bilibili every day (Bilibili, 2022). Among the users of Bilibili, the young group accounts for a large part, and the video book telling is favored by the Z generation, which is more intuitive than the traditional graphic and audio content presentation forms. Watching reading videos can not only extract the essence of the book and help readers understand its content but also show the book in three-dimensional form. Video creators and readers can communicate with each other in the pop-up or comment area, answering readers’ questions in time, which meets the needs of the new generation of young people for instant communication. With the rise of TikTok, Kuaishou, and WeChat applet, a large part of the national video content reading habits have been developed, in the content of the wave of video; watching reading videos has a promising future.

The Listening Group Is Growing, and Mobile Audio App Platforms Are the Most Favored

As shown in Table 4, in the past five years, the group of nationals who have the habit of listening to books is growing; in 2022, 35.5% of nationals have listened to books. With the rise of the national demand for listening

to books, the market is gradually rich in listening to books media; in all listening to books media, the mobile audio App utilization rate is the highest. According to the *2021 China Network Audio Industry Research Report* released by iResearch Consulting (2022), in 2021, the scale of the network audio industry reached 12.3 billion, and the audio book market accounted for 5 billion. As the listening group grows, the audiobook market will usher in a breakthrough.

The reading form of audiobooks enables readers to liberate their eyes while acquiring the content. Media such as mobile audiobook App platforms, smart speakers, and WeChat official accounts or applets make it convenient for nationals to listen to audiobooks as if they were listening to music, and the combination of real people reading aloud and background music matching the content leads listeners into a kind of immersive reading journey. The huge amount of audiobook content and the open platform enable nationals not only to be immersed in audiobook reading for a long time, but also to be entertained and entertained in fragmented time, such as during commuting, lunch breaks, and before bedtime.

A Continuing Call for Nationwide Reading Activities

According to the 20th *National Reading Survey Report*, in 2022, the awareness rate of national reading brand activities among adult nationals in China reached 73.7%, the participation rate of nationwide reading brand activities reached 66.7%, and the nationals' satisfaction with the reading activities they had participated in reached 72.2%. As can be seen from Table 5, in the past five years, the nationals' voices have continued to be high regarding the organization of nationwide reading activities in their localities. To a certain extent, these phenomena reflect that the positive feedback from nationals who have participated in nationwide reading activities on the effect of the activities is considerable, and nationwide reading activities are favored by nationals. On the other hand, they also reflect that the degree of promotion and participation in nationwide reading brand activities needs to be improved, that the demand of nationals for participation in nationwide reading activities has not yet been met, that more nationals wish to participate in nationwide reading activities, and that the popularization and regularization of nationwide reading activities need to be strengthened.

Publishers' Development Strategies to Cope With Changes in National Reading

Publishers, as the upstream industry of the book industry and an important part of the cultural industry, have shouldered the cultural mission with the goals of deeply promoting nationwide reading and building a strong cultural country. The publishing industry should take the initiative to undertake the task of reading promotion to accelerate the pace of the construction of scholarly China. Based on the analysis of the changes and new trends presented in the national reading survey reports over the past five years, publishers have to continue to innovate their development strategies and improve the methods of promoting nationwide reading to better expand the publication market, promote sales, and realize their profitability while meeting the reading needs of the nationals in all aspects, and to achieve a win-win situation for both social and economic benefits in promoting nationwide reading.

Adhering to the Original Intent of Publishing and Fully Performing the Function of Guiding Readers to Read

Publishers should adhere to the original intention of serving readers, making good and excellent publications, and providing readers with high-quality and nutritious spiritual food. Readers are influenced by publishers and establish contact with publishers mainly through the intermediary of publications; a good publication passes on

to the readers' reading motivation far greater than a loud appeal. Publishers must strictly control all aspects of publication to provide readers with high-quality spiritual food, enrich the readers' inner world, and deliver knowledge, touch, and love to readers. At the same time, publishers also shoulder the function of guiding readers to read, that is, they shoulder the function of guiding readers from the content and quality in the production of publications, and shoulder the function of guiding readers to read from the publicity and promotion in the marketing process. The guidance of the publisher is related to the reading taste and reading interest of the readers.

Creating High-Quality Books and Improving Paper Books

Publishers should establish a sense of excellence, to create high-quality books, based on the national preference for reading paper books. Publishers should pay more attention to the control of the quality of paper books, and adhere to the content, editing, design, and printing of the four aspects of the rigorous control, not in any part of the negligence. Publishers should seize the advantage of the national tendency to read paper books, to attract readers with high-quality publications, focus on brand building, and pay more attention to the reader's reading experience of the feedback, through the WeChat readers group, e-commerce platform readers group, and other channels to collect feedback from readers, and share the reading experience with the readers through online live broadcasts, offline lectures, or reading activities. Publishers should help the national paper book reading "tendency" into the paper book reading "practical action force". On the one hand, do a good job in the quality of paper books. On the other hand, do a good job in the publicity and distribution of paper books, to promote the national per capita reading of paper books significantly increased.

Focusing on New Ways of Reading for Nationals, Layout of Audiobooks, and Video Book Telling Boards

Publishers also need to pay close attention to the reading habits of readers and cutting-edge reading styles. Audiobook reading was also a niche reading method before, but with the expansion of listening books and the growth of the audiobook industry, the market size of audiobooks has expanded. According to the *2020-2021 Annual Report of China's Digital Publishing Industry*, China's long audio market will be 27.24 billion yuan in 2020, with a growth rate of 54.9% (Annual Report Project Group of China Digital Publishing Industry, 2021); the development of audiobooks is fast and the product types are more refined. Nowadays, more and more publishers have incorporated the audiobook business into their digital transformation, synchronizing book publishing with the planning, production, promotion, and distribution of audiobooks. Then, in the budding stage of video book talking, publishers should also plan video book talking selections based on their specialties. For example, members of the editorial department try to share the content of video book talking organize video book talking in conjunction with the video platform, and cooperate with potential hosts. The publisher should understand the national preference for the topic selection of video book talking, based on the creativity and planning ability of their won, lay out the video book talking section, and give full play to the long tail effect of the small field.

Innovative Forms of Content Presentation to Meet Readers' Reading Needs in a Variety of Scenarios

With a national digital reading rate of 80.1% in 2022, the large digital reading group is a source of motivation for publishers to innovate content presentations. Nowadays, publishing must not be limited to the paper book business. Publishers must tap content resources, improve their ability to compose and create content, reorganize and adapt content, and innovate content presentation forms suitable for reading in different scenarios. According to the *China Digital Reading Report 2022*, the scale of China's digital reading users will reach 530 million in 2022, and readers aged 19 to 45 are the main force of digital reading (Yin, 2023). Therefore, publishers should

see the market demand for digital reading, combine their characteristics, and fully understand the reading preferences of the target group.

Innovative forms of content presentation, for example, e-books, can be opened very easily, any time, any place, downloaded in advance; the phone can be read with power; audiobooks can liberate both eyes and can meet the reader's reading needs in the scene of fitness, housework, and inconvenient to read on the way to work; video book talking is a form that allows readers to understand the book more three-dimensionally through the cell phone frequency screen and explanation. In addition, in the past two years, the sound medium of podcast is a revival. In May 2023, at the 5th PodFest China, Himalayan editor-in-chief Li Jiongding mentioned in his keynote speech that the number of podcast listeners on the Himalayan platform has exceeded 160 million. CITIC, DUKU, Imaginist, and other Chinese publishing brands have begun running podcasts, inviting authors, scholars, and cultural industry practitioners to talk about a topic and share books and the story behind the publication of books. Podcasts are gradually becoming the publishing brand new book marketing position and content presentation plate; podcasting business can be the next publishers need to consider.

Jointly Organizing Book Festivals With the Main Bodies to expand the Radius of Nationwide Reading Activities

The promotion of nationwide reading is a systematic project, and it is necessary to gather the strengths of many parties to normalize it. Although national reading satisfaction is on the rise, it is generally low, and the national demand for nationwide reading activities is growing. Therefore, publishers should try their best to meet the national demand for nationwide reading activities, and give full play to the resources of authors and editorial teams. Plan online and offline nationwide reading activities, such as book-sharing sessions, author meetings, readers' symposiums, and other cultural exchange activities. They should shoulder their social responsibility, engage in public welfare activities, donate books to remote areas, and bring the fragrance of books to more people in need. In addition, publishers should actively join hands with other local publishers and jointly organize book festivals, such as Reading Week and Reading Month, with relevant local departments. The "Scholarly Wuhan—National Reading Month" is a reading activity organized by Wuhan Publishing Group in cooperation with the government and relevant departments, and it has been held for the 12th year in 2023. It is the most influential brand of cultural activities in Wuhan, and with the joint efforts of many parties, the per capita reading volume in Wuhan in 2022 was 9.54 books (Yan, 2023). To create a scholarly energy saving with local characteristics to most accurately enhance the exposure rate of residents to the nationwide reading activities, to lead by point, and then expand the radiation scope of the nationwide reading activities, publishers should look up to the excellent nationwide reading promotion programs, unite with local publishing groups, joint publishers and bookstores, joint publishers and libraries, joint official media and we media, and layout omni-channel nationwide reading promotion activities. This can attract the participation of different audience groups to a certain extent, give full play to each subject's advantages and popularity, and expand the influence of nationwide reading promotion activities.

Conclusion

Looking at the nationwide reading situation from 2018 to 2022, it can be found that nationwide reading is developing in the direction of reading autonomy and media diversification. The changes and new trends in nationwide reading are closely related to the development of publishers, which conduct business and promote

reading based on understanding nationwide reading, to better meet the reading needs of the nationals and promote the in-depth development of nationwide reading. The in-depth development of nationwide reading is conducive to developing the market potential and development space of the publishing industry, guiding the direction of publishing, and providing opportunities for building a strong publishing country (Liu, 2010). The publisher should start from the actual situation, take the improvement of national reading as the starting point, take the in-depth promotion of reading for all as the starting point, understand the market changes, improve their own business, strengthen the cooperation with other subjects, and jointly build a strong reading atmosphere of “love reading, reading good books, and be good at reading”.

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