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Academic production, strategy and trends: a bibliometric analysis of articles on the brazilian publishing market from 2002 to 2022

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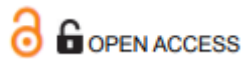
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Abstract

Objective: Identify what has been produced in the academic environment from 2002 to 2022 about the Brazilian publishing market and analyze the elements and agents from the perspective of Porter's Theory of Competitive Advantage.

Methodology: This is an exploratory study with data presented quantitatively and qualitatively through a bibliometric review. The Bradford, Zips and Lotka laws were used. The survey was carried out on the SciELO database and the productions were analyzed using the "Microsoft Excel", "IRaMuTeQ" and "VOSviewer" software.

Results: The quantitative analysis reveals a trend in the publication of articles in the period from 2002 to 2022, especially from 2010 onwards, as well as the number of authors publishing about the Brazilian publishing market; there is a preference for individual writing on the subject and a dispersion of articles in different journals. The analysis shows that 65.11% of articles are the result of individual research, therefore, there is no significant collaboration between researchers. Longitudinal analysis of the active forms of keywords reveals study trends over the years, as well as central issues in discussions regarding commerce, research and book culture. Similarity analysis revealed the prominence and concentration of studies on the subjects of "book", "publishing", "translation" and "literature", and potential interest in works on adjacent subjects such as "contemporary", "independent", "journalism", "social", "women" and "black"; Porterian analysis reflected the high bargaining power of suppliers and the concentration of power of dominant publishers, making it difficult for new competitors to enter the market.

Contributions: Identifies main research interests over the last two decades within the sector, highlighting its economic and social importance and offering strategic insights into its production chain and sector analysis, with a view to enriching future academic studies and managers' understanding of the sector's macro-environment and the supply chain of books.

Keywords: publishing market, bibliometrics, book production chain, similarity analysis, Porter

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Resumo

Produção acadêmica, estratégia e tendências: uma análise bibliométrica de artigos sobre o mercado editorial brasileiro de 2002 a 2022

Objetivo: Identificar o que se produziu no ambiente acadêmico, no período de 2002 a 2022, acerca do mercado editorial brasileiro e, a partir disso, analisar os elementos e agentes sob a ótica da teoria da vantagem competitiva de Porter.

Metodologia: Foi conduzida uma pesquisa de caráter exploratório, com dados apresentados de forma quantitativa e qualitativa por meio de uma revisão bibliométrica. Foram utilizadas as Leis de Bradford, Zips e Lotka. O levantamento se deu na base SciELO e a análise das produções foram realizadas com apoio dos softwares "Microsoft Excel", "IRaMuTeQ" e "VOSviewer"

Resultados: A análise quantitativa revela a tendência na publicação de artigos no período de 2002 a 2022, principalmente a partir de 2010, assim como a quantidade de autores que publicam sobre o mercado editorial brasileiro; nota-se a preferência pela escrita individual sobre o tema e a dispersão de artigos em periódicos diferentes. A análise evidencia que 65,11% de artigos são frutos de pesquisas individuais, logo, não há significativa colaboração entre os pesquisadores. A análise longitudinal das formas ativas das palavras-chaves revela tendências de estudo ao longo dos anos, além de assuntos centrais nas discussões em relação ao comércio, pesquisa e cultura do livro. A análise de similitude revelou destaque e concentração de estudos acerca dos assuntos "livro", "editorial", "tradução" e "literatura", e potencial interesse de trabalhos por temas adjacentes como "contemporâneo", "independente", "jornalismo", "social", "mulher" e "negro"; a análise porteriana refletiu o alto poder de barganha dos fornecedores e a concentração de poder de editoras dominantes, dificultando a entrada de novos concorrentes.

Contribuições: Identifica os principais interesses de pesquisa nas últimas duas décadas dentro do setor, destacando sua importância econômica e social e oferecendo *insights* estratégicos sobre sua cadeia produtiva e análise setorial, visando enriquecer futuros estudos acadêmicos e a compreensão de gestores acerca do macroambiente do setor e da cadeia produtiva do livro.

Palavras-chave: mercado editorial, bibliometria, cadeia produtiva do livro, análise de similitude, Porter

Resumen

Producción académica, estrategia y tendencias: análisis bibliométrico de artículos sobre el mercado editorial brasileño de 2002 a 2022

Objetivo: Identificar lo que se ha producido en el medio académico entre 2002 y 2022 sobre el mercado editorial brasileño y, a partir de ahí, analizar los elementos y agentes desde la perspectiva de la teoría de la ventaja competitiva de Porter.

Metodología: Se realizó un estudio exploratorio, con datos presentados cuantitativamente y cualitativamente através de una revisión bibliométrica. Se utilizaron las leyes de Bradford, Zips y Lotka. La encuesta fue realizada en la base de datos SciELO y las producciones fueron analizadas utilizando los softwares "Microsoft Excel", "IRaMuTeQ" y "VOSviewer".

Resultados: El análisis cuantitativo revela una tendencia en la publicación de artículos en el período de 2002 a 2022, especialmente a partir de 2010, así como el número de autores que publican en el mercado editorial brasileño; hay una preferencia por la escritura individual sobre el tema y una dispersión de artículos en diferentes revistas. El análisis muestra que el 65,11% de los artículos son resultado de investigaciones individuales, por lo tanto, no existe una

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colaboración significativa entre investigadores. Un análisis longitudinal de las formas activas de las palabras-chaves revela tendencias de estudio a lo largo de los años, además de assuntos centrais nas discusiones en relación con el comercio, la pesquisa y la cultura del libro. El análisis de similitud reveló la prominencia y concentración de estudios sobre los temas "libro", "edición", "traducción" y "literatura", y el potencial interés por trabajos sobre temas adyacentes como "contemporáneo", "independiente", "periodismo", "social", "mujeres" y "negro"; el análisis porteriano reflejó el alto poder de negociación de los proveedores y la concentración de poder de las editoriales dominantes, lo que dificulta la entrada de nuevos competidores.
Aportes: Identifica los principales intereses de investigación en las últimas dos décadas dentro del sector, destacando su importancia económica y social y ofreciendo visiones estratégicas sobre su cadena de producción y análisis sectorial, con vistas a enriquecer futuros estudios académicos y la comprensión de los gerentes sobre el macroentorno del sector y de la cadena de producción del libro.

Palabras clave: mercado editorial, bibliometría, cadena de producción del libro, análisis de similitud, Porter

Introduction

The publishing market has its own dynamics and is affected by technologies as well as by the development of language, customs, socio-economic aspects, in short, it can be seen as a living organism, since it is constantly evolving and plays a fundamental role in the dissemination and exchange of knowledge, culture, ideas and ideals. The term "publishing market" or "publishing industry" itself covers the entire production chain of printed or digital materials in circulation, including the preparation of materials, production, publication, distribution and sale of books, magazines, newspapers, e-books, audiobooks and other forms of media in these formats. This market has the ability to adapt to the changes and demands of its consumer public. A contemporary characteristic of books, for example, proves the volatility of this market through a phenomenon known as convergence (Jenkins, 2008), which can be exemplified with books that have generated movies (as happened with *Alice in Wonderland* and *City of God*) or electronic games (as noted in *Resident Evil* and *Assassin's Creed*). The encounters generated by this market facilitate the growth of transmedia environments and make it possible, taking into account the entrepreneurial vision, to exploit these new markets and create business models that generate simultaneous opportunities in different industries (Rodrigues et al, 2014).

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For Thompson (2023), the convergence of the challenges faced by creative economies is reflected in the book industry and the influence of technologies that interact with the publishing market. He notes that in today's age of mobile devices and the internet, traditional media are under increasing pressure from new forms of communication and patterns of media use. The author points to the example where many newspapers have been forced to shut down, while others have had to reduce their operations and lay off staff due to decreased circulation and loss of advertising revenue. There is also the case of the music industry, which underwent a significant transformation between the 1990s and early 2000s, with CDs and vinyl records being replaced by digital downloads and streaming services. We see that these changes resulted in a dramatic drop in the music industry's revenue in the first decade of the 21st century, with a reduction of more than half of the total revenue from sales of recorded music in the United States of America. The author concludes that although the vinyl record has experienced a modest comeback in recent years, it represents only a small fraction of the music industry's total revenue today.

From an economic and political point of view, the publishing market plays a significant role. It is a sector that generates jobs in different areas, such as writing, editing, proofreading, translation, design, marketing and sales, and actively contributes to the economy by stimulating trade in products that include, but also cross, the book production chain, such as those present in the industry of pulp and paper, of printing and of technology. In terms of figures, it is a market that has earned between R$2 billion and R$5 billion a year over the last 15 years in Brazil (FIPE, 2007; Nielsen Bookdata, 2023). It is therefore a relevant market, with a complex production chain, which promotes access to education and the formation of culture, creates new jobs and actively contributes to the country's economy, making it pertinent to study its operation, results, changes and trends in depth. In order to understand the Brazilian publishing market, the starting point for this research was a study of academic production on the subject, from a bibliometric perspective, from 2002 to 2022, after which the elements found were analyzed from the perspective of Michael Porter's competitive forces model (Porter, 2004).

The results for the field are a stimulus for publishers to consult this material in order to better define their publishing strategies and get in touch with trends in the publishing industry. Among the strategic paths, the identification of publishing patterns, the possibility of diversifying their target audience, expanding their catalog, understanding the popularity of certain themes and authors and even predicting future demands can be considered. It also provides paths to a more accurate understanding of the publishing market and allows publishers to make informed decisions about what types of books to publish, how to target their marketing

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efforts and how to position their publications more effectively in the market. In the current economic context, where technology, innovation and cultural content are competitive factors, companies and the public sector must prepare themselves to understand market trends. This effort opens up space for future research that may deepen the knowledge about the issues addressed and discuss actions and reactions to promote the competitiveness of the national industry and the dissemination of Brazilian content (Mello et al, 2016).

In order to achieve the objective of this research, it was necessary to discuss the Brazilian publishing market, survey scientific production in a given period of time about the sector, collect and analyze the publications found, assemble a database and organize the data according to the proposed theme. This study is exploratory in nature, with data presented quantitatively through frequency distribution, as well as analysis of qualitative biases, thus making it a mixed approach. The presentation of results and discussions includes a general analysis of the articles, an analysis of co-authorship, an analysis of the frequency of active keyword terms from 2002 to 2022, an analysis of similarity and a Porterian analysis of the sector. The results indicate a major contribution to the publishing market, highlighting its economic and social importance and offering strategic *insights* into the book production chain and sector analysis.

Theoretical framework

Reimão (2018) states that there is a consensus among scholars that 1922 was the year the cultural industry began in Brazil, with the advent of radio, which was joined by periodicals, magazine theater, the phonograph industry and musical movies. However, it was not until the 1960s that the cultural industry developed significantly in the country, with the launch of Jornal Nacional by Rede Globo in 1969. Television is the dominant sector of the communications industry in post-1960s Brazil, followed by radio and cinema. Brazilian publishing, on the other hand, has been less studied compared to other branches of industrialized cultural production.

From a historical perspective, the publishing industry is literally a billionaire: in 2006, sales to the market plus sales to the government amounted to R$2.8 billion (FIPE, 2007) and, in 2021, the same result was R$5.8 billion (CBL, SNEL, Nielsen BookData, 2022). The indexes include works from the sub-sectors of textbooks (TB), general works (GW), religious (REL) and scientific, technical and professional (STP). These figures are segmented between sales to the market, which represents a lower percentage share, and to the government, which, in the period from 2006 to 2021, represented a higher percentage share, indicating that the State is the industry's biggest customer, validating the fact that textbooks are classified as the sales leaders among the other subsectors. Therefore, the largest single consumer of books in Brazil is the

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Federal Government, through the National Textbook Program (PNLD) and the National School Library Program (PNBE). Technological advances are transforming the cultural and entertainment sectors, bringing both opportunities and uncertainties. In the book industry, the internet and digital technologies can expand access to reading and create opportunities for everyone involved in the production chain. The main trends observed in Brazil and around the world include: the different pace at which e-books are being disseminated in different countries; the entry of new players and the emergence of new activities; increased market concentration, especially in the bookstores and publishers of textbooks (TB) and scientific, technical and professional books (STP); and the emergence of new business models, such as self-publishing and digital content subscriptions (Mello et al, 2016).

In this sense, Earp and Cornis (2005) consider that there is an impact of new technologies on the publishing market, especially with the arrival of major players, such as Amazon.com, and the establishment of an e-commerce model for the book world, as well as the role of large online distribution chains in the book business, the impact of e-books on business models between publishers and consumers, the rise of print-on-demand, the digital printing system in the book industry and the role of the internet printing protocol.

In relation to the impact of digital technologies on the publishing market, Thompson (2023) reflects on how this revolution has affected the book industry, considered to be the oldest of the media industries. The author notes that the printed book has existed for more than five centuries, since Johann Gutenberg's experiments with the movable-type printing press around 1440. He highlights the fundamental role of books in the creation, accumulation and transmission of knowledge, especially in the humanities and social sciences, as well as their importance in enriching social, cultural and political life. Thompson notes that, despite the changes in the way books are printed and sold since the emergence of the market in the 15th century, the basic format of the book has remained practically unchanged over the centuries. The author also questions whether this persistence of the printed book as a physical object will continue in the digital age, asking whether it will suffer the same fate as vinyl records. Thompson raises these questions to provoke reflection on the future of the printed book in the face of current technological transformations.

Given these challenges, Mello et al (2016) point out that, in order for the new digital technologies to move more quickly towards their full potential in Brazil, a number of challenges need to be overcome, and it is not yet possible to identify an agent that is acting as a catalyst for the spread of these digital technologies. The government, through its purchasing power, would be in a position to take on this role, encourage the development and gradual use of these

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technologies and thus resolve uncertainties, especially when combined with actions to encourage reading and form new readers.

It is therefore necessary to constantly research and analyze the Brazilian publishing market, so that all players in the book production chain can understand, in addition to their own impact and operating model, how and what strategies competitors are adopting in their business models. In their study, Rodrigues et al (2014) recognized a gap in studies on the challenges and strategic implications faced by players in the publishing industry and the need to better understand the publishing ecosystem in Brazil, the changes it has been going through and its impact on the structure of the industry, business models, profitability and even the survival of established companies. The results point to some pitfalls that emerge from the literature on Innovation and Ecosystems and that can help executives and academics understand why history constantly repeats itself and why incumbents facing disruptive technologies often fail to react, driving their businesses into bankruptcy and making way for new companies with innovative approaches, different mindsets and new business models.

Analyzing an industry's competitive environment is important for understanding the relationships between participants, identifying industry influences and evaluating changes and trends that can affect profitability. The five forces model, developed by Michael Porter, deals with identifying the basic natural characteristics of industries that determine the set of competitive forces and, therefore, the industry's profitability. The five competitive forces – entry, threat of substitution, bargaining power of buyers, bargaining power of suppliers and rivalry between current competitors – reflect the fact that competition in an industry is not limited to established players. For an industry, customers, suppliers, substitutes and entrants are all considered "competitors", with greater or lesser importance, according to each particularity (Porter, 2004).

Understanding the structure of an industry is the starting point for strategic analysis, which focuses on identifying the basic characteristics of that industry, rooted in its economy and technology, allowing the competitive strategy to be properly modeled. From this analysis, companies' strengths and weaknesses emerge, which are made up of important technical and economic characteristics to define the intensity and criticality of each competitive force (Porter, 2004). Although limited and static (it represents the profitability of a sector at a given time, in a given situation), Porter's five forces model is still valid for analyzing the profitability of a sector at a specific time. However, it needs to be complemented with approaches that consider the dynamics of an industry, including factors in motion and the prospect of future paths, as

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well as considering technological and innovation issues that are absent from this model (Félix, 2013).

Therefore, combining bibliometric analysis with other strategies, such as Porter's five forces approach, provides a rich understanding of sector dynamics. Bibliometric analysis can provide historical and theoretical context, helping to identify gaps in current knowledge and guiding the selection and development of complementary approaches. By combining different analysis strategies, the validity of the results obtained is strengthened, since different methods and perspectives are used to evaluate a sector and thus build a competitive advantage.

Methodological procedures

This study is a bibliometric review that sought to identify the scientific productions carried out in national and international journals, in Portuguese, between 2002 and the second half of 2022, about the publishing market. According to Silva (2008), bibliometric studies are used to organize certain amounts of information, which in some way could remain disorganized and unread, even though they are considered quality material by scholars and, according to Pritchard (1969), the main characteristics of bibliometrics involve: i) identifying trends and growth of certain knowledge; ii) studying the dispersion and obsolescence of certain scientific subjects; iii) measuring the impact of published studies and the information disseminated in academia; iv) quantifying the coverage of scientific journals; and v) identifying which authors and institutions are most productive in academia.

The laws that govern this study are shown in Table 1 below:

Table 1

Laws of bibliometrics

Laws	Measure	Objective
Bradford's Law	Degree of attraction of the journal	Identify the most relevant journals that give the most attention to a specific topic
Zipf's Law	Keyword frequency	Estimate the most recurrent themes related to a field of knowledge
Lotka's Law	Author productivity	Survey the impact of an author's production in an area of knowledge

Source: Adapted from Chueke and Amatucci (2015).

The research began with a search for articles on the subject and also by identifying whether there was bibliometric research in the area. To this end, the start date filter was not

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inserted in the first search, since identifying the first writings on the subject is seen as a key indicator. Considering the lack of bibliometrics in the area, it can be said that the importance of this research lies in filling this academic gap and contributing to organizations.

This study is exploratory in nature, with data presented quantitatively through frequency distribution, as well as analysis of qualitative biases, making this a mixed approach, which combines or associates qualitative and quantitative approaches. According to Richardson (2017), this research plan followed the QUANTI quali sequential exploratory design, starting with data collection and quantitative analysis and then carrying out the qualitative analysis, ending with the interpretation of the entire joint analysis.

Given the advantages of bibliometrics in identifying trends, measuring the impact of publications and quantifying the coverage of scientific journals, this methodology gives editors and professionals in the field a broad view of readers' preferences and demands. In addition, by measuring the impact of publications, bibliometrics provides an objective assessment of the reach and influence of specific studies and topics, helping to select titles for publication and define marketing strategies, for example. By quantifying the coverage of journals, bibliometrics can help provide valuable insights for making decisions about investing in new publishing projects and expanding a publisher's catalog.

Table 2

Framework describing the stages and criteria for building the base

STAGE	DESCRIPTION
Step 1	Search for articles in various databases such as Web of Science, SPELL, Periódicos CAPES and SciELO.
Step 2	Definition for the SciELO database, definition of search terms based on keywords and definition of the software used.
Step 3	Survey of 635 articles.
Step 4	The time filter was applied for articles published between 2002 and 2022 and 127 articles were excluded.
Step 5	Analysis and individual reading of the title, abstract and keywords of the 508 results, assessing issues such as thematic relevance, type of publication and language.
Step 6	Completion of the final database with 129 articles and processing in the defined software.

Source: Prepared by the authors.

In order to meet the objective of this study, the Scientific Electronic Library Online (SciELO), a virtual library of Brazilian scientific journals in electronic format, was used to carry

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out the search for articles, as it is an established database with a wide repertoire for the organizational field at national and regional level[c], which organizes and publishes full texts of journals on the Internet/Web, in addition, it also produces and publishes indicators of their use and impact. Before deciding on SciELO, searches were carried out in the usual management databases such as the Periódicos CAPES Portal and the Scientific Periodicals Electronic Library (SPELL), where there were few results that captured the publishing market in other sciences, such as literature or economics. The decision to use the SciELO database revealed significant results from multidisciplinary articles, including areas such as pedagogy, literature, economics and administration, which generated more robust data as well as the possibility of the analysis being carried out using the chosen software. The search terms were defined using the keywords "publishing market", "literary market", "book publishing", "literature publishing", "publishing production", "publishing" and "publishers", which were used in the search field separated by the Boolean operator OR, whose function is to find records that contain at least one of the terms separated by the operator.

The *SciELO* search returned 635 results. After applying the chronological filter, 127 results were excluded, leaving 508 published from 2002 to 2022. After cutting out other results from the search that were not applicable to this study – i.e. editorials, books, abstracts and reviews – the manual analysis of the exclusion of results was continued. As the focus of this study concerns the publishing market, articles involving social movements, analyses related to scientific production and academic journals, literary genres, literary criticism and interviews were removed. In terms of language and geography, articles that relate to the publishing market in Brazil, but which have been published in foreign journals were selected. Therefore, the selection of articles in this study includes publications from outside Brazil, in languages such as English and Spanish, but which analyze the Brazilian publishing market.

Thus, after manual and individual analysis of the title, abstract and keywords of the 508 results, focusing on a time frame from 2002 to 2022, whose main theme was the Brazilian publishing market, the result was 129 articles. The justification for the research being constituted by articles from 2002 onwards is due to the fact that this is the year in which the frequency of publications on the subject arises, thus being able to capture the evolution of the subject over the last twenty years.

Once the database had been collected, a table was created in Microsoft Excel to organize the data from each of the publications, separating them by author, title, abstract, year of

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[c] Since the library contains South American journals, not just Brazilian ones.

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publication, journals and keywords, in order to assemble the tables with each piece of data to be analyzed. The textual analysis software IRaMuTeQ[d] (*Interface de R pour les Analyses Multidimensionnelles de Textes et de Questionnaires*)[e] was used to create the cloud of terms in keywords and the lexical and longitudinal analysis of the keywords. This software was developed by French researcher Pierre Ratinaud in *open source* condition, on the R statistical model and Python language, and allows lexicographic surveys to be carried out (Jardim; Vasques, 2019). For this research, similarity analysis was carried out, which identifies the co-occurrences among words and its result shows indications of the connection among words, helping to identify the structure of the content of a textual corpus (Camargo; Justo, 2018). The co-authorship analyses were carried out using the VOSviewer software, chosen because it is a free project, contains extensive documentation on how it works, has a robust graphical interface and, for this specific analysis, is compatible with the data obtained and previously organized in Microsoft Excel. In addition, Caneppele et al (2023) show that VOSViewer has proved to be an excellent choice of software for bibliometric research, due to the advantage that it can be used with a variety of databases, provides mapping techniques suited to the researcher's needs and runs on a variety of operational systems, as well as being able to be started directly from the Internet.

Considering the publishing market, a strategic analysis was drawn up based on Porter's five forces (2004), which deals with the threats encountered by companies when immersing themselves in this new market. The five forces are elements grouped together in a model outlined by Porter (2004), which have the ability to influence the attractiveness of the market. In this way, suppliers, possible new competitors, the intensity of rivalry between competitors, buyers and substitute products were taken into account. These forces encompass the rules of competition, which enable companies to adopt corporate practices aimed at obtaining rates of return higher than costs, directly affecting profitability (Porter, 2004).

Data Analysis and discussion of Results

This chapter presents the description and analysis of the data generated in this research, in order to identify the main characteristics of the studies found on the publishing market in the *SciELO* database, from 2002 to 2022. To better visualize the results, the following figures and tables were drawn up to make it easier to understand the analyses based on the year the articles were published, the main journals and authors, the themes and keywords.
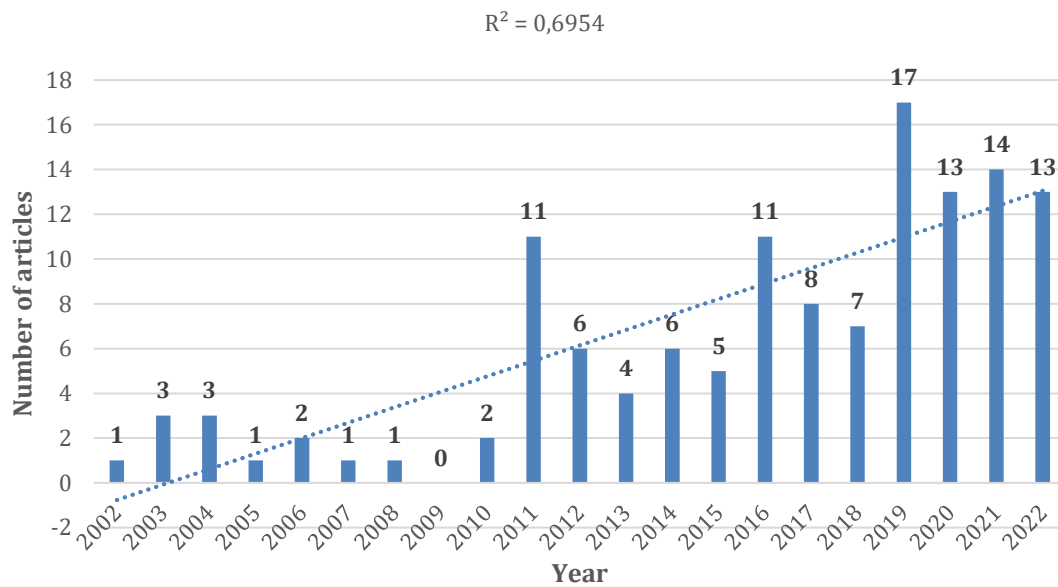
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[d] Version 0.7 alpha 2, with R-4.1.3.
[e] The analysis was carried out on an AVELL notebook with a 12th Generation Intel(R) Core(™) i7 processor, a GeForce RTX 3050 graphics card, 32 GB (gigabytes) of RAM and a Windows 10 Home 64-bit operating system.

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Figure 1 shows a graphical representation of the number of articles published per year between 2002 and 2022, totaling 129 articles.

Figure 1

Total number of articles published per year

$R^2 = 0{,}6954$

Figure 1 shows incipient publication until 2008 and zero publication in 2009. From 2002 to 2010, there was a low frequency, representing 10.85% of all articles, with an average of 1.56 articles per year. From 2011 to 2018, there was an increase in results, accounting for 44.96% of the articles found in this period alone, with an average of 7.25 articles per year; compared to the previous period, there was a 314% increase in results. In 2019, another peak in publications can be seen, representing the beginning of the period until 2022. This period alone, from 2019 to 2022, concentrates 44.18% of the articles in this research, with an average of 14.25 articles per year, which points to the relevance of recent studies in the field. It is possible to notice a considerable increase in studies with each cycle of around 8 years; if this trend continues in the cycle started in 2019, it will be the cycle with the highest number of publications on the subject.

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Figure 2

Number of authors published per year
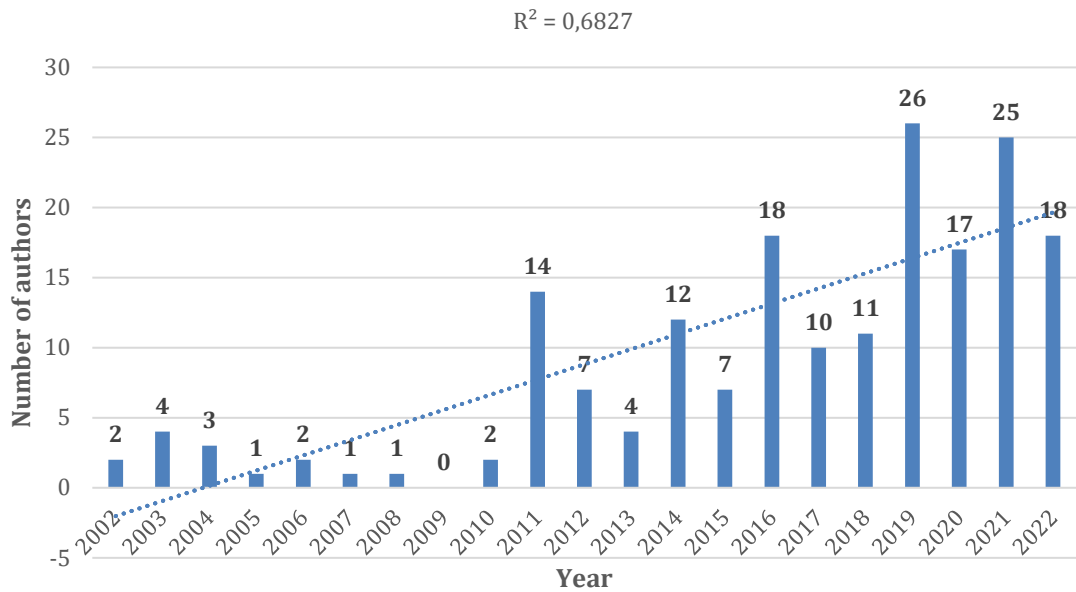
Source: Own elaboration based on survey data.

Figure 2 shows that the number of authors who published during the period was 185 for a total of 129 articles, with an average of 1.43 authors per article, indicating a low frequency of co-authored articles. It is possible to observe the increasing distribution of the number of authors, in line with the growth in publications and the increased interest of more researchers in this subject. It can also be seen that the period between 2019 and 2022 concentrates 46.48% of the total number of authors, similar to the cycle of publications per year (Figure 1). This shows an increase in the number of researchers and production on the subject.

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Figure 3

Number of authors per article
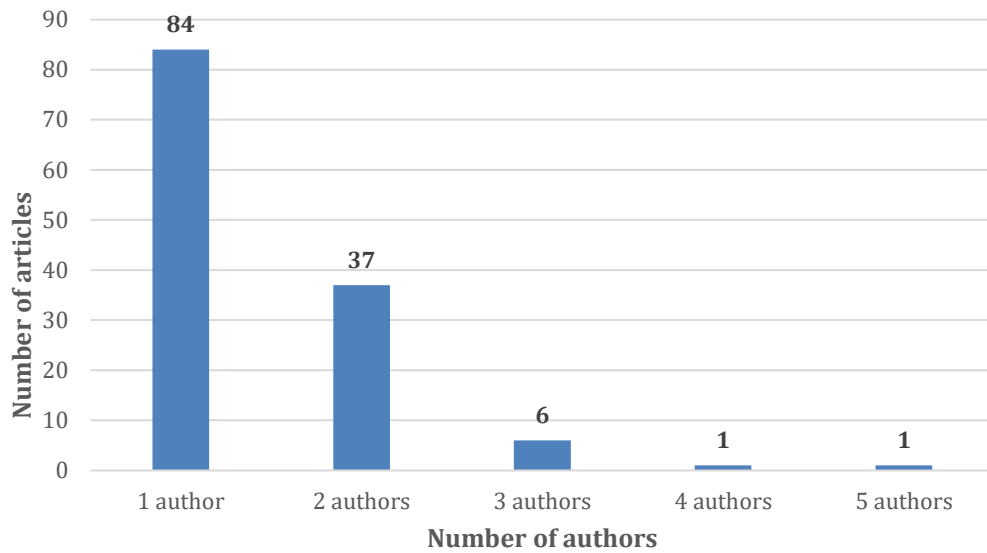
Source: Own elaboration based on survey data

In Figure 3, it is possible to identify individual production, with 84 articles representing 65.11% of the total, followed by a preference for two authors, 28.69% of the articles. Articles with three, four and five authors together account for 6.20% of the articles.

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Table 3

Number of articles per journal

Journal	Number of articles
Estudos de Literatura Brasileira Contemporânea	19
História da Educação	7
História (São Paulo)	6
Cuadernos del Centro de Estudios en Diseño y Comunicación. Ensayos	3
Revista de História (São Paulo)	4
Cadernos CEDES	4
Educação em Revista	3
Revista Brasileira de História	3
Linguagem em (Dis)curso	3
Topoi (Rio de Janeiro)	3
Revista Brasileira de História da Educação	3
Educar em Revista	3
Sociedade e Estado	3
Revista Estudos Feministas	3
Other (48)	62

Source: Own elaboration based on survey data.

As Table 3 above shows, the academic journals that published the most articles totaled 68 publications, representing 52.30% of the total number of articles, which points to a concentration of publications on the subject in a small number of journals, especially when considering the first six journals in the table, which concentrate 44 articles and 33.84% of the total. The journal *Estudos de Literatura Brasileira Contemporânea* stands out in this list, with a total of 19 articles from 2002 to 2022, concentrating 14.62% of the articles found in this research. Another 48 journals account for 62 articles from this database, with an average of 1.29 articles per journal, representing 47.69% of the results, validating Bradford's Law. In view of the scope and editorial line of the first five journals in Table 2, there is a concentration of articles on the subject in journals in the fields of literature, history, education and communication. This result is in line with the fact that there are articles with studies: that aim to understand the complex aspects - economic, ideological, political and historical - that permeate the fields of literature and book publishing in the country (Cargnelutti, 2020); on school books as instruments for promoting Italian national identity in Brazil during the early years of fascism

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(1922-1925) (Barausse, 2016); on how and why two books by Editora Alfa-Omega were characterized as opposition books to the dictatorship then in force in Brazil and the political role these works played in the period studied (Maués, 2020); and on publishers dedicated to publishing works by and for women, in addition to considerations on independent publishing (Ribeiro, 2022).

Table 4

List of authors with most articles (starting at two)

Author	Number of articles
Ribeiro, Ana Elisa	4
Maués, Flamarion	4
Szpilbarg, Daniela	2
Peres, Eliane	2
Nóbrega, Leonardo	2
Muniz Jr., José de Souza	2
Luca, Tania Regina de	2
Leão, Andréa Borges	2
Filgueiras, Juliana Miranda	2
Czajka, Rodrigo	2
Camargo Jr, Kenneth Rochel de	2

Source: Own elaboration based on survey data.

Table 4 above, representing Lotka's Law, shows the productivity of each of the 185 authors in relation to the topic, indicating two authors with four articles published at the top, but who, overall, have a low productivity, with an average of 1.43 articles published per author. Based on the analysis of the data from this study, it is possible to conclude that the two authors with the most articles are published in the journal with most articles, indicating a correlation between the authors who publish the most and the journal with most publications (Table 2).

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Table 5

List of the number of occurrences of terms in keywords

| Term	Number of occurrences in keywords
book	36
editorial	35
literature	33
market	22
history	20
edition	13
didactic	13
translation	12
literary	12
children's	12
publisher	12
Brazilian	12
Brazil	12
education	11
editor	11
woman	7
culture	7
publication	6
black	6
intellectual	6
independent	6
school	6
teaching	6
cultural	6
communication	6
field	6
access	6

Source: Own elaboration based on survey data.

The IRaMuTeQ software was used to analyze the keywords, and Table 5 above shows the terms with the highest frequency in keywords, with the terms "book", "publishing", "literature", "market" and "history" accounting for 42.94% of the occurrences. From this *corpus*, it is possible to note the segmentation in the frequency of words, with the first 13 or more occurrences being classified as the main topics of this database and the terms with less than 12 occurrences being classified as sub-themes of these main topics, as can be seen from the fact that the terms "literary", "children's", "women", "black", "independent" and "communication" are research areas covered by the study of books and the publishing market.

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In order to respond to Zipf's Law (1949), the word cloud shown in Figure 4 was created using the IRaMuTeQ software, based on the inclusion of 550 keywords in its textual corpus:

Figure 4

Cloud of terms present in the articles' keywords
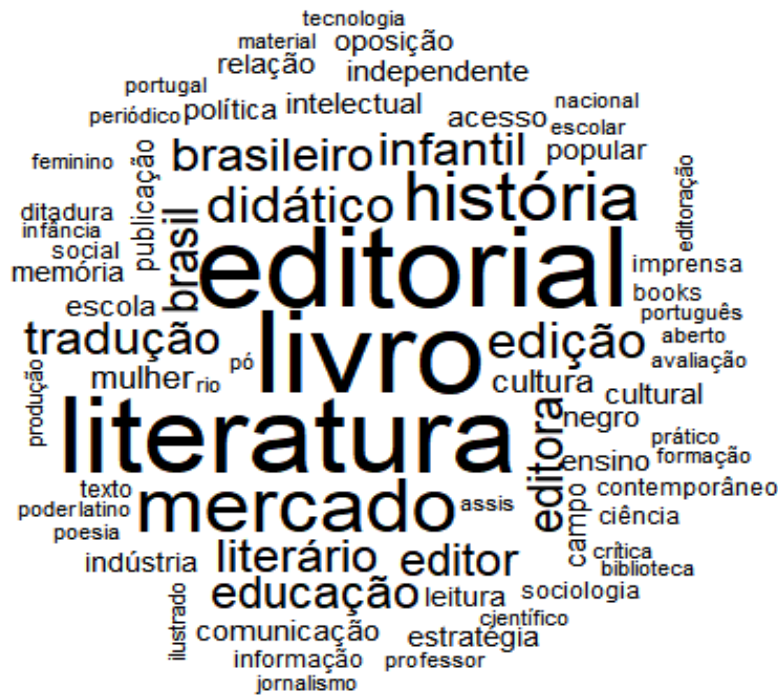
Source: Own elaboration based on survey data.

Conjunctions and connectives ("de", "como", "e", "para", "em" – "of", "as", "and", "in") were removed, based on a minimum of six repetitions of each term in the keywords. It can be seen that the words highlighted in the center of the cloud are the most common, with "livro" ("book") present in 10.59% of the occurrences, "editorial" in 10.29%, "literatura" ("literature") in 9.71% and "mercado" ("market") in 6.47%. It can be seen that the most used words in the composition of the articles' keywords have a direct link to the theme of this research, indicating relevant topics that are the subject of adjacent studies in academic production about the publishing market.

The quantitative analysis of the articles allowed us to identify a trend towards an increase in academic studies on this topic, since there has been a crescent in the number of articles published between 2002 and 2022, especially since 2010, as well as in the number of authors publishing on the Brazilian publishing market. We can also see a preference for

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individual writing on the subject and the dispersion of articles in different journals. Even though there is one journal with 19 publications, indicating the concentration of the subject, there is an average of 2 articles per journal, proving Bradford's Law.

Coauthorship Analysis

For Vanz and Stumpf (2010), co-authorship is the result of effective and substantial collaboration between the researchers in a study, which is more vital and more active than simply exchanging materials, information and comments. In other words, co-authors are those who participate fully in the preparation of the research and share responsibility for the content and defend the idea and results presented.

Figure 5

Heat map relating co-authorship between authors in the database
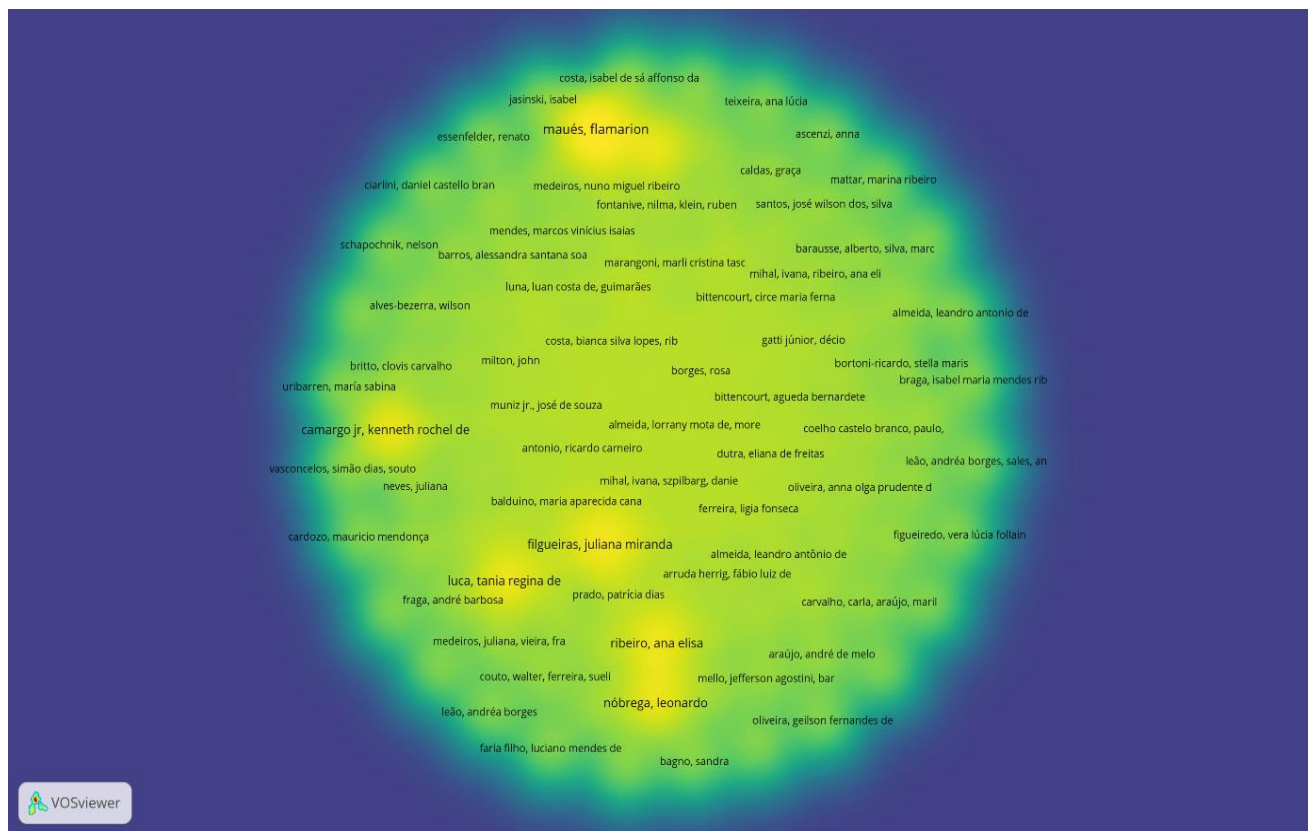
Source: Own elaboration based on survey data.

Regarding the co-authorship found in this study, it can be seen in Figure 5 above that the diversity in co-authorship patterns in articles from 2002 to 2022 reveals a lack of significant collaboration between researchers, evidenced by the fact that 65.11% of the articles were written by just one author (Figure 3). Thus, it can be said that the interest is individualized, that

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is, it does not involve groups of researchers, nor are there any research projects involving teachers and students.

The lack of collaboration between researchers can have negative consequences, such as limiting inter- and multidisciplinary perspectives. Collaboration between researchers from different disciplines or with different areas of specialization can enrich future publishing research, leading to a more comprehensive and innovative approach to the problems and challenges encountered. It is worth considering the role of academic institutions in promoting collaboration and the role of academia with policies that encourage and value interdisciplinary and even international collaboration, contributing to the advancement of studies in the publishing field.

Analysis of the frequency of active keyword terms from 2002 to 2022

In order to better visualize the way in which the keywords were distributed in the articles during the period studied in this paper, Figure 6 is shown below, facilitating a longitudinal analysis of the terms, which allows the evolution and/or history of the research topics to be identified.

The active forms were identified by the Iramuteq software by individually entering the keywords of the articles grouped by year. The software is responsible for recognizing the active forms of the keywords and indicating their frequency; for the construction of the active forms, the software disregards connectives and prepositions. The terms in bold and italics are those that are repeated at least once and the terms in highlighted colors are just to make it easier to see the occurrences over time.

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Figure 6

Representation of the number of occurrences of the active forms of the keywords in the corpus of this study over time

Number of occurrences of the active form	Year																			
	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010	2008	2007	2006	2005	2004	2003	2002
6			book																	
5												literature								
4	woman, history, edition	black, book, literary, independent	literature, children's, history, editorial	literature			book, communication		market			market								
3	social	literature, editorial, Brazilian	material, editorial, culture		book	literature	translation, market, editorial	book	editorial, editorial		literature, editorial	translation						book		
2	text, black, market, literature, independent, ethos, education	sociology, advertising, market, history, edition, publisher, editor, performance, department	opposition, market, illustrated, female, dictatorship, Brazilian, Brazil	technology, river, Portuguese, woman, innovation, history, spiritist, school, didactic, colonial, booklet, Brazilian	literature, history, Brazil	report, psychology, literary, children's, school, Brazilian	service, politics, literary, identity, scientific, field, Brazil	editor	practical, opposition, publisher	school	children's, education, access	teleworking, relationship, book, literary, Latin, industry, culture, contemporary, American			strategy			dream	feminist, teaching, editorial, evaluation	
1													resistance, popular, poet, northeastern, military, intellectual, press, history, left, edition, editor, dictatorship, cultural, cordel, communist	Portuguese, person, language, book, special, education, speech, didactic, disability, analysis	politics, opposition, media, book, language, reading, history, education, editorial, publisher, criticism	book, history, teaching, editor, didactic	popular, agenda, function, edition, publisher, book, culture, authorship, author	publication, teacher, production, planning, book, didactic, fundamental, teacher education, editor, science, bioethics	sexuality, sexology, psychoanalysis, market, history, editorial

Source: Own elaboration based on survey data.

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The term "book", highlighted with a yellow background, first appeared in 2003, and continues to appear consecutively in the active forms of keywords until 2007, when it is found again in 2011, 2015, 2016, 2018, 2020 and 2021. It is possible to see the progress and growth of search interest in this specific product, which is part of the publishing market, compared to other products such as newspapers, magazines or even e-books. Its first appearance, with just one occurrence in 2003, followed by the latest appearances, in 2021 with four occurrences and 2020 with six occurrences, reveal the term as ascending in importance as an object of study in research, especially since 2011, when the term starts to have at least two occurrences in its appearances. The constant prominence given to the term "book" reflects the fundamental importance of this product in the publishing industry, highlighting it as the focal point of researchers' debates and interests. In addition, the book is largely responsible for materializing and connecting with other terms at the top of the frequency, such as textbooks, children's books, literary books (novels, short stories, poetry) and history books.

Accompanying the fact that the publishing market is very interested in textbooks, it is possible to see that research also values this area, since, although the term "didactic" was only mentioned in 2004, 2005, 2007 and 2019, there are other supplementary terms that represent studies on textbooks, such as "teacher", "education" and "school". The same is true for the term "woman", with four appearances in 2022 and two in 2019. However, other terms that may represent this class of studies appear at other times, such as "feminist" in 2003 and "feminine" in 2020. There is also the question of whether the term "publisher" means a company that edits and publishes books, or a professional who edits a book, so it is necessary to look individually at each article with these aspects for the correct thematic classification.

As well as the increase in the appearance of the term "woman" in studies, there are other terms that appear mainly from 2017 onwards, revealing themselves as emerging themes in research, such as: "Brazilian" (in 2017, 2019 and 2020), indicating progress in studies on national territory; "black", with four appearances in 2021 and two in 2022, indicating a recent interest in studies on race and social movements and the term "children's", with its first appearance in 2012, but occurring again in 2017 and 2020, indicating the importance given to the children's book segment by researchers.

There are some terms whose appearance accompanies the growth in publications from 2011 onwards (Figure 1), such as "literature", "publishing" and "market" (the latter of which first appeared in 2002). The persistence of these terms over time suggests that the discussion within this field continues to be the publishing industry, the recurring presence of the active form "market" indicates a continued interest in the economic and commercial dynamics of the

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publishing sector, such as sales, consumer trends and market strategies. From another perspective, the frequency of the term "literature" suggests that the discussion extends beyond purely commercial issues to include artistic, cultural and academic aspects related to the production and circulation of literary works. Taken together, these terms reflect the complex intersection between the commercial and cultural aspects of the publishing industry, as well as the constant interest in understanding and responding to changes in this ever-evolving subject.

Overall, the longitudinal analysis of the active forms present in the keywords in this research *corpus* can provide relevant information on the evolution of research topics, allowing us to identify emerging trends, changes in focus and gaps in knowledge. For publishing market professionals, this analysis offers an understanding of the demands and interests of readers and provides valuable insights for publishing market professionals, guiding strategies and decision-making.

Similarity Analysis

Figure 7 shows the communities of similarities generated from the inclusion of 550 keywords in the IRaMuTeQ software, referring to the 129 articles in this research. We can see the largest community in the center, led by the word "book", with the highest number of occurrences in the keywords, with a small community inserted containing the words "education" and "teacher", and three other smaller and peripheral communities, linked to the central community, represented by the words "editorial", "translation" and "literature".

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Figure 7

Graph of similarities with the formation of communities containing the terms in the articles' keywords

Source: Own elaboration based on survey data, IRAMUTEQ.

In the central term of the similarities graph, we have the community highlighted with the word "book", which is close to and directly linked to the words "Brazil", "didactic", "publishing", "publisher", "industry" and "culture", validating that these are the terms that form the thematic basis of this study, and reiterating the importance that the textbook subsector has in the Brazilian publishing market. It is also possible to see terms that derive from and complement research on themes related to the central word, such as "reading", "opposition", "criticism", "illustrated" and others with greater distance, such as "material", "Latin" and "scientific". Finally, there is a community that is almost entirely part of the central community,

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formed by the terms "education" and "teacher", indicating a significant role for this area of knowledge, since teachers are the main agents for the efficient use of textbooks and educational materials, which constitute the main share of market revenue.

In the branch generated by the term "literature", connected to the central term "book", we see the presence of three other significant terms linked to it: "history", "education" and "children's", creating a community correlated to the literary strands presented in the articles. This can be seen by finding the terms "science", "sociology", "feminine", "social", "poetry" and "library", indicating how important historical, children's and educational literature are in consolidating research involving the publishing market.

In the branch generated by the term "editorial", we see a ramification of terms that come from it, as well as branches that come from the term "market", which is directly linked to the former. The branches linked to the term "editorial" include the terms "Portuguese", "publisher" and "politics", "book", "choice", "woman", "publication", "production" and "evaluation". Here, we can see how the studies linked to the term "editorial" have an involvement with publishing houses, publication itself and the relevance of the presence of the term "woman", highlighting the link between studies of the presence and insertion of women in the market and their participation in publishing houses. Next, we have the term "market", with the main branches "publishing", "independent", "contemporary", "national" and "childhood", creating the community of studies that focus on the current market (as can be seen in Figure 1, with an increase in articles from 2010 onwards) and the presence of a community involved in the study of the independent market. Although there is comprehensive research trying to define what an "independent publisher" is[f] and which and who its agents are, this community demonstrates the interest of academia in understanding this term.

In the community generated by linking the term "translation" to the central term "book", it can be seen how the market for books in other languages has a significant share of research into the publishing market. This community includes the main terms "strategy", "text", "journalism", "communication" and "information".

The correlation between the central term "book" and the three peripheral terms "publishing", "translation" and "literature" indicates studies that aim to expand research into these areas of knowledge that are part of the publishing market, such as the involvement of activities related to book publishing and its agents; the act of making literary works from other languages, countries and cultures accessible to a wider audience, enabling works to be read in

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[f] As can be seen in Silva (2022).

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different languages around the world, and the means by which works in genres such as novels, poetry, drama and short stories are shared and accessed. Although the publishing market is made up of products other than books, the fact that the term "book" is the central one, with the highest occurrence in the keyword database of the articles in this study, indicates how the book industry has a large focus of interest and derives other academic studies in parallel industries.

From a strategic point of view, the analysis of similarities resulting in the identification of central communities and their branches is a valuable strategic tool for editors and managers when managing publishing houses in a competitive market environment. In the community formed by the term "literature", for example, there are the branches "female", "black", "poetry" and "children's", themes that suggest subjects at stake in academic research and which may reflect the demand for consumption within these niches. In addition, the community exclusively formed by the two terms "teacher" and "training" indicates the important possibility of having a plan dedicated to textbooks, especially if the publisher's business model has a strategic plan geared towards government notices. By understanding the interconnections and relationships between these terms, professionals in the sector can identify emerging trends, public demands and gaps in the market.

From the similarity analysis, therefore, we can see the prominence and concentration of studies on the subjects of "book", "publishing", "translation" and "literature" as the main topics for understanding the publishing market in Brazil, indicating a potential interest in works on adjacent topics, based on the presence of the terms "contemporary", "independent", "journalism", "social", "woman", "black" and "teaching".
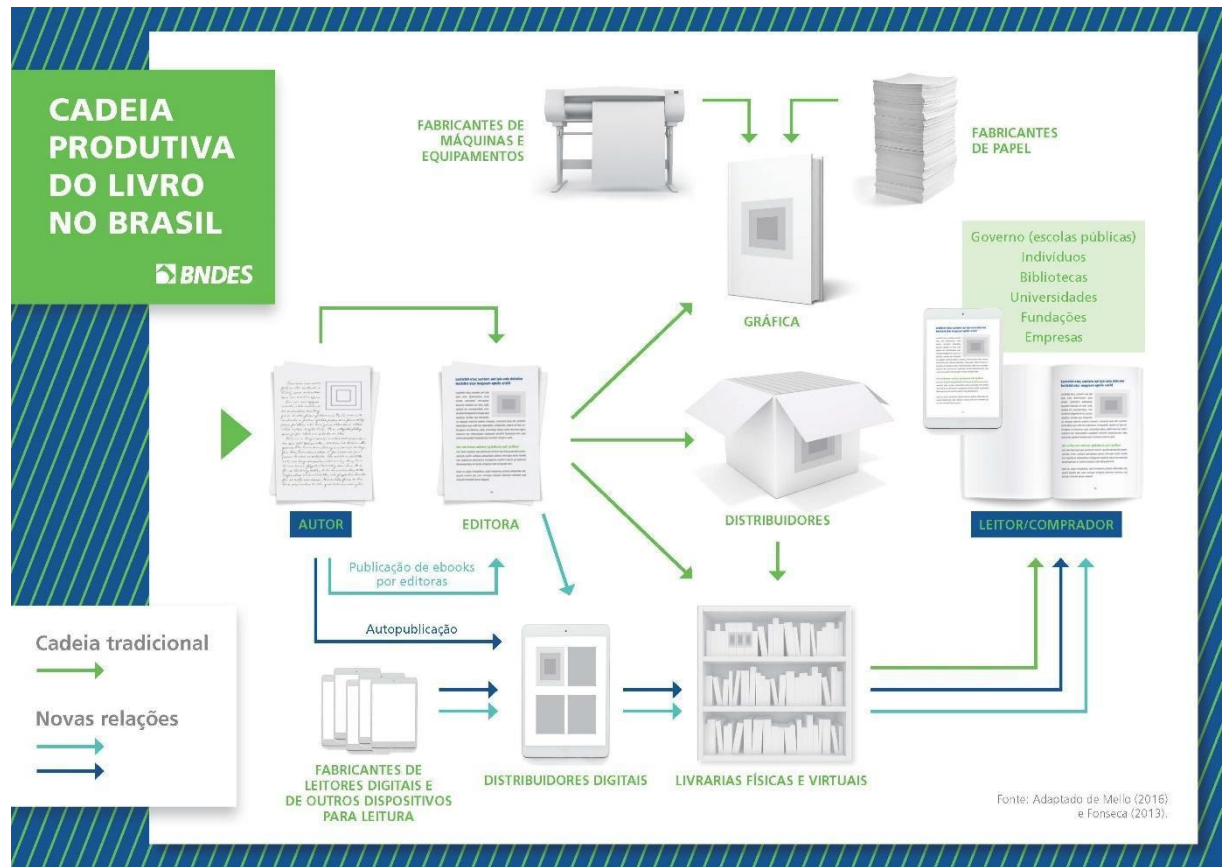
Porterian analysis of the sector

According to Porter (2004), in order to formulate an effective competitive strategy, it is essential to establish a relationship between the organization and its environment. Industries, like other companies, are also influenced by external forces. The degree of competition in an industry, defined as an environment where competition between companies takes place, is determined by the five main competitive forces. These forces are responsible for determining the profit potential of a given market and include threats from new entrants, which are newly arrived companies that bring relative innovative potential and share the market with existing competitors.

Mello et al (2016) explore the significant transformations in the book industry due to technological advances, and the following infographic identifies the main participants involved in the book production chain in Brazil.

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Figure 8

Book production chain in Brazil

Source: Mello et al (2016).

Taking into account the articles analyzed for the bibliometric review and based on the five forces presented by Porter (2004) and the book's production chain, the following analysis was drawn up.

Suppliers' bargaining power

In the publishing market, the supply agents are the printers and distributors and also the authors themselves, who act as content suppliers. Authors have a certain amount of bargaining power, especially authors who have already published works and are relevant on the scene, who can demand better contracts and higher royalties. However, publishers also have the ability to select the authors they want to work with and have the issue of historical relevance of published works in their catalog. Printers and distributors may have some negotiating power and, for the most part, this is linked to the quality of the work provided, the quality of the service, the final quality of the project (after finishing) and the possibility of personalization, but publishers generally have several options available on the market, which can reduce this bargaining power.

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As for printers, their bargaining power is significant, since their costs are in line with the dollar rate (Brigatti, 2022), on which the prices of several of the inputs used in book printing are based: paper, inks, rubber blankets (which transmit the ink to the paper) and printing plates. In other words, the increase in the price of inputs is passed on to the consumer.

Bargaining power of buyers

Buyers in the Brazilian publishing market are mainly readers and bookstores. The Portraits of Reading in Brazil survey, carried out by the Pró-Livro Institute (IPL) in 2019, considers a "reader"[g] to be someone who has read at least one book, in whole or in parts, in the last three months, and indicates that Brazil has around 52 million readers. Thus, with the rise of online sales platforms, both from *e-commerce* companies and bookstores' own *online* stores, and the popularization of e-books, readers have more purchasing options and access to a greater variety of titles. This has increased buyers' bargaining power, since it is easier to compare prices and choose between different reading media (digital or printed). Bookstores, for their part, have relative bargaining power, with the power to decide which books will go into their catalog and the ability to negotiate profit margins and payment terms with publishers.

Threat of new entrants

Although the Brazilian publishing market is competitive, the entry of new competitors faces significant barriers. This industry requires a considerable investment in capital in order to start competing, since it is necessary to acquire computers and software, copyrights, qualified professionals, knowledge of the editorial stages and relationships with authors, as well as facing all the challenges in the distribution and promotion of books, which today includes physical and digital spaces. Established or "traditional" publishers, on the other hand, already have a consolidated presence, with recognized brands and a loyal reader base, which makes it difficult for new entrants to penetrate the market.

Level of rivalry

The Brazilian publishing market shows significant rivalry between competitors. Analyzing Table 6 below, for example, it is possible to see, from 2015 to 2022, the concentration of companies that were among the five publishers with the highest number of titles sold in the year, in the "general" category[h].

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[g] "Non-readers", in turn, are considered to be those who have declared that they have not read any books in the last 3 months, even if they have read books in the last 12 months (IPL, 2020).

[h] The "general" category includes "fiction", "non-fiction", "self-help", "children's" and "business" books, and the data was taken from the annual reports of the PublishNews portal, a portal specializing in news and information about the book industry, created on July 20, 2001 by publisher and consultant Carlo Carrenho and supported by the Brazilian Book Chamber (CBL).

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Table 6

List of publishers among the five with the most titles sold in Brazil in the "General" category, from 2015 to 2022

Publisher	2015	2016	2017	2018	2019	2020	2021	2022	Sum
Sextante	1	1	1	1	1	1	1	1	8
Grupo Companhia das Letras	1	1	1	1	1	1	1	1	8
Gente	0	0	1	1	1	1	1	1	6
Grupo Editorial Record	1	1	1	0	0	0	1	1	5
Intrínseca	1	1	0	1	1	1	0	0	5
Nobel	0	1	1	1	0	0	0	0	3
Grupo Editorial Alta Books	0	0	0	0	1	1	1	1	3
Ciranda Cultural	0	0	0	1	0	0	0	0	1
Planeta	0	0	0	0	1	0	0	0	1

Source: Own elaboration based on data from PublishNews and the Brazilian Book Chamber.

During this period, the two publishers that share the top spot are Sextante and Grupo Companhia das Letras, with titles with the highest number of sales during all eight years, followed by Gente, with titles in the top five six times, and Grupo Editorial Record and Intrínseca, five times among the top five publishers in terms of annual sales.

It can be seen that although there are several publishing houses in the country, from large traditional publishers to independent publishers that vary according to the volume of sales and degree of management complexity, each one has its own segments of competition in relation to the different levels of rivalry. This competition is often driven by the search for relevant titles, competing for space in bookstores and winning over new readers. In this way, it is possible to see that the market is also characterized by a concentration of power in the hands of a few dominant publishers, which can make it difficult for new competitors to enter.

Substitute products

With the advance of technology, the threat of substitute products in the publishing market has increased in recent years. In addition to the popularity of e-books and audiobooks as alternatives to printed books, there are other forms of entertainment vying for readers' attention, such as social networks, the rise of streaming and the growth of the movie, series and digital games industry. Even so, it is possible to classify travel and other means of leisure as

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substitute products for reading, as they are alternative forms of entertainment and sources of knowledge and, in this case, consumers' time, interest and financial resources are taken into account. Changes in consumer preferences and habits also affect the demand for books, in addition to other factors.

From the Porterian analysis of the sector, it is possible to understand, from a systematic view, who the agents are, which stages and which industries cross the book production chain. We can see, for example, the role of the writer as the main supplier in the chain, who initiates the processes and relationships with other agents, industries and suppliers. In addition, identifying what is being produced in the academic environment can be a way of capturing elements and applying them in a micro-environment analysis using Porter's five forces, becoming a tool to help managers and publishers plan, make decisions, make editorial choices and better qualify their positioning in the publishing market.

Conclusion

As presented throughout this work, it is possible to see the importance of the publishing market in economic and social development and in its role as an industry that provides access to knowledge through books and other formats of printed content in Brazil. With the results found, it was possible to identify and analyze what was produced in the academic environment between 2002 and 2022 about the Brazilian publishing market and, based on this, to analyze the elements and agents from the perspective of Porter's theory of competitive advantage, benefiting researchers and professionals on the subject. For the field of strategy, this study makes it very clear that publishing organizations should be considered for the purpose of filling gaps in empirical research, capturing strategies for managing Porter's five forces in an environment linked to the public sector as well as a necessary high degree of emerging and niche-focused strategic planning.

It is therefore believed that this bibliometric survey of the Brazilian publishing market contributes to the recognition of the sector as a topic of study, pointing out the main themes of interest over the last twenty years, presenting the panorama of the market and its influence on the composition and insertion in a larger production chain; it collaborates with the analysis of the market from a strategic viewpoint based on the perspective of the book production chain and sector analysis and helps with future research into the academic production of this topic and its trends. It is recommended that managers and publishers follow the themes and trends of academic research related to the publishing market and keep updated with the changes and demands of the environment to ensure business relevance and competitiveness. By

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understanding audience preferences, technological innovations and consumer dynamics, managers and publishers can make more informed and strategic decisions. This not only helps anticipate market needs, but also allows them to identify opportunities for growth and differentiation.

As for suggestions for future work, one possibility is the expansion of keywords that could capture other articles, since new technologies, scenarios and research interests lead to the creation of new terms. This could involve studies on how technologies are changing book production, distribution and consumption; changes in book consumption patterns; the impact of government policies and regulations on the publishing industry, including copyright laws, subsidy policies and book price regulations and how the Brazilian publishing market works when compared to different countries and regions to identify global trends and cultural differences in book production and consumption. It was also noted that there are other works and academic research on the subject, but that they do not fall under the heading of "article", which is the focus of this research, such as final papers (monographs), theses, dissertations and, above all, books. That is why it is important to study the state of the art in other categories of production, such as the thesis and dissertation repositories of the main postgraduate institutions in Brazil that have publications in this thematic area and the catalogs of publishers whose portfolio includes technical and scientific books that cover data and analysis on the subject.

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