

Re-defining Indie

Charting the course of independent
authors in the digital age



Researchers

Arthur Ehlinger, Researcher and Knowledge Exchange Officer

Stefan Luca, Postdoctoral Researcher in Platform Regulation

Amy Thomas, Lecturer in Intellectual Property and Information Law

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CREATe (www.create.ac.uk), School of Law, University of Glasgow, 10 The Square, Glasgow G12 8QQ, United Kingdom

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Table of contents



Executive summary	3
Context for the report	5
Method	8
The indie market	12
Technology	25
Creative production	37
Resources	49

Executive summary

The Alliance of Independent Authors, together with Learn Self Publishing, commissioned CREATE (the Centre for Regulation of the Creative Economy based at the University of Glasgow) to conduct research into the independent (indie, or self-publishing) author market. In particular, this research considers whether, in contrast to authors who rely on traditional publishing routes, indie authors evidence a different, more progressive, trajectory for authorial success in respect of both their earnings profile, and in the diversity of cultural content produced in this market. This report synthesises the findings of quantitative and qualitative research conducted over the course of a year:

- Secondary analysis of data gathered by way of an online survey conducted in February and March 2023 by The Future of Publishing and SKS Advisors. This survey received 2,539 responses, globally.
- Primary data gathered from interviews with eight of the respondents to the survey, conducted between November and December 2023.

This synthesis of evidence is presented across three key themes.

The indie market

The initial section outlines the indie publishing market, providing insights into the fundamental aspects that shape it. We begin by discussing the primary motivations for authors choosing this publication route, notably the pursuit of creative and financial autonomy. Subsequently, we introduce a taxonomy for authors, categorising them into three distinct groups based on their career stages, highlighting the diverse experiences within the indie author community. Furthermore, we propose a conceptual mapping of the market as a complex ecosystem where various components interact, offering both new opportunities and challenges.

The observations in this section provide a basis for understanding the indie publishing market while underscoring the need for closer examination of the services authors resort to, with the aim of safeguarding them against exploitative and unfair practices.

Technology

The second section of our analysis focuses on the tech-intensive nature of the indie author's journey, encompassing aspects from production to marketing. While the indie path offers a sense of autonomy, it simultaneously introduces a new layer of dependence on technology. We detail how authors must adeptly navigate through a landscape where platform rules and policies are in flux, leaving them without any influence over these changes. Additionally, we examine the dual role of AI in the indie publishing industry. On one hand, AI poses challenges to an already delicate system, yet on the other, it offers advantages, particularly for emerging authors that may lack robust financial resources.

Creative production

The final section of this report considers the conditions in the indie market which facilitate the creation of diverse, and culturally valuable, works, in line with the historic ethos of indie publishing. We find that, whilst the indie market has a diverse population of authors from an array of different demographic backgrounds, there are persistent, systematic factors which continue to exclude marginalised demographic groups – these factors cannot be attributed to any strategic, professional choice associated with typically lower incomes. Likewise, we find that potentially helpful legal tools, such as copyright law, which could aid authors in financially supporting their career, are overall underutilised: a ‘tool for the rich’, rather than an inalienable right of the creator. The findings of this section suggest that direct, enabling intervention may be needed to continue to support and diversify creative production in the indie market.



Context for the report

Historically, 'indie' publishing was synonymous with a do-it-yourself (DIY) approach, where authors handled all aspects of the publishing process, from writing and editing to cover design, marketing, and distribution, often with limited resources.

This approach was marked by a sense of grassroots authenticity and personal control over the creative process, which was oppositional to the dominant mode of centralised, organisational traditional publishing. With the advent of direct-to-reader publishing, the indie model offered authors a means of bypassing publishing houses as gatekeepers to key cultural markets. In theory, this allowed for access to and support of authors and genres which would otherwise struggle to gain mainstream support.

However, as the indie market has matured, and newer and more affordable technologies have developed, these historic characteristics have evolved. In this report, we evidence that the indie market is no longer characterised by the disintermediated grassroots author of the 2007 Kindle era. Instead, we re-define the indie author of Web 2.0 as an entrepreneur: one who makes strategic decisions to emulate or subvert expectations of 'how writing should work' in traditional publishing.

In particular, the continued growth of indie publishing has lowered the barriers to market entry for authors, and has led to increased market saturation. As a consequence, indie authors have been compelled to enhance the quality of their work, and marketing ability, to distinguish themselves against an ever growing competition. This elevation in quality, in turn, raises readers' expectations, creating a feedback loop where authors are continuously driven to meet and exceed these heightened standards. This phenomenon is not only evident through market trends but is also recognised by the indie authors we interviewed as part of this project:



People think just because they have written a book, it should sell. I think that's going to be coming crashing down. It's a harsh reality. People are tired of reading bad books. And that's not fair to the up, and comers who might not have the money. But it's like any other business. If you want to succeed, you have to invest.

Now, the use of professional editing services, cover designers and sophisticated marketing strategies, all of which were traditionally the domain of mainstream publishing houses, means that many authors have transformed their writing endeavours into professional, sometimes quasi-industrial, operations. This is particularly evident among financially successful indie authors: they manage teams comprising editors, designers, marketers, and publicists; they adopt a systematic approach to production, marketing, and distribution, involving strategic planning, market analysis, and brand development.

And now, as newer and more sophisticated generative AI technologies advance, the possibilities for affordable, and largely instantaneous, creation of content has become a possibility even for those authors without significant financial resources to draw from. The evolving definition of 'indie' in the context of self-publishing is further influenced by the reliance of authors, irrespective of their success level, on major corporations like Amazon, Facebook, or IngramSpark. This reliance on networks of editors, producers, distributors and other intermediaries throughout the publishing process challenges the conventional understanding of independence, associated with a degree of separation from large, centralised organisations.

In this report we consider whether the increase of 'indie intermediaries' has compromised the historic promise of the indie market: are indie authors, in the face of increased demands for quality and professionalism, still autonomous in their decision-making and creative freedom? Does the indie market still support the diversity and plurality of content which characterised the early e-book era of the noughties? In respect of both of these questions, an omnipresent consideration throughout this report is not only whether this promise is achievable in the first instance, but also whether it is meaningfully enabled and sustained through flourishing working conditions and routes to earnings.



Method

Survey

The survey data was gathered via an independent, online survey commissioned by ALLi, and conducted by publishing research and strategy consultancy, SKS Advisors, overseen by publishing analysts, The Future of Publishing.[1] The survey was circulated via email lists and social media between 26 February and 10 March 2023 and was available globally to potential respondents. No financial incentives were offered to respondents to complete the survey.

The survey received a total of 2,539 responses, 2,263 (89%) of which were from 'primary occupation' indie authors, being defined as authors who have self-published at least one book and who spend at least 50% of their working time on writing and self-publishing activities. We dropped two (erroneous) outlier observations for a total of 2,261 observations.

As the survey enabled respondents to skip questions by design, we did not dismiss partial responses and instead considered all valid responses in our analysis. As such, the analysis presented in this report may not account for 100% of all 2,261 valid responses when we consider specific subsets of authors.

[1] The initial report published by ALLi consisted of descriptive, summary statistics giving an overview of the characteristics of indie authors, see ALLi (2023) Author Income Survey: Media Links and Summary of Findings (ALLi, date unknown) <<https://selfpublishingadvice.org/income-survey-2023-media-links/>>

Nor did we apply any statistical weights to make the survey more representative of the total writing population. As with our approach in previous earnings surveys, there is inherent instability about how we define authors (especially indie authors with disparate earning sources). With this particular dataset, there was also uncertainty about who has access to a link to the survey, which was circulated widely on social media.

To ensure parity of treatment of income from respondents across different countries and who reported income in different currencies, all income reported here was calculated by a simplified exchange to USD based on the average exchange rates in 2022.^[2] We also limit our analysis to those indie authors who had self-published at least one book, and who spent at least 50% of their working time on writing or self-publishing activities, being the most relevant group for the purposes of policy (given the relative importance of indie writing to their overall income).

To ensure we captured the most accurate picture of the ‘typical’ experience of an indie author, we calculated all annual earnings using the median. This is to account for skews in the data from ‘superstar’ earners which can artificially inflate the average income, usually calculated by the mean (the highest earner reported an income of 11,000,000 USD in 2022 and 4,100,000 USD in 2021 respectively).

[2] Exchange Rates (date unknown) US Dollar (USD) to British Pound (GBP) (Exchange Rates, date unknown) <[The initial report published by ALLi consisted of descriptive, summary statistics giving an overview of the characteristics of indie authors, see ALLi \(2023\) Author Income Survey: Media Links and Summary of Findings \(ALLi, date unknown\) <https://selfpublishingadvice.org/income-survey-2023-media-links/>](#)>

Finally, we make comparisons throughout this report between the data presented here and the findings of a series of longitudinal surveys of the broader writing population in the UK,[3] many of whom rely on traditional (trade) modes of publishing. Nonetheless, we caution that both populations from these respective surveys have very different characteristics that make direct and precise comparisons difficult.[4] As such, we make comparisons between the findings of both reports where this may be helpful for identifying general trends in the writing market, but find no merit or justification for an exhaustive point-by-point comparison.

Interviews

In addition to the quantitative survey data, we conducted a series of qualitative interviews to gain deeper insights into the experiences and perspectives of independent authors and to give explanatory value to the quantitative findings. A total of eight interviews with independent authors, lasting between 60 and 90 minutes, were conducted via video conferencing. These participants were selected following their agreement to be contacted for further research, indicated at the conclusion of an initial survey. As survey participants were de-identified from their personal data, it was not possible to screen interviewees based on their demographic profile for representativeness of the broader indie author population.

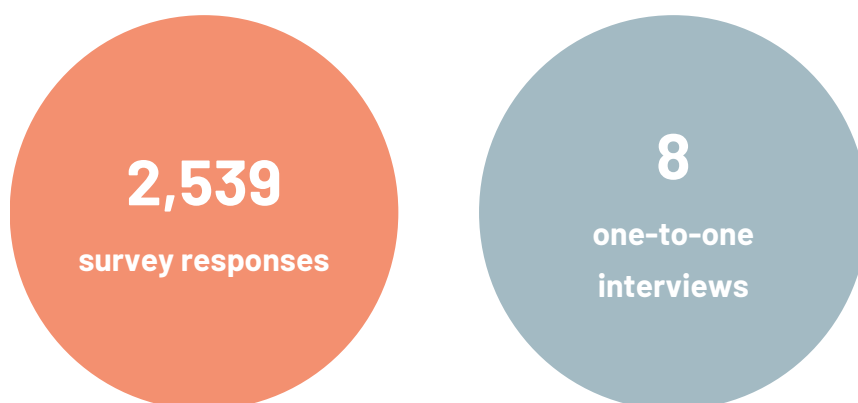
[3] See Thomas, Battisti and Kretschmer (2022) UK Authors' Earnings and Contracts 2023 <<https://www.create.ac.uk/project/creative-industries/2022/12/08/authors-earnings-and-contracts/>> - 21% of all primary occupation authors self-published material in the past.

[4] The previous report was only issued to members of a UK collecting society, whereas the present survey has global respondents. We also note that the present survey has a more detailed demographic profile and nuanced consideration of business strategies and techniques particular to the population of indie authors.

The interviews were conducted in a semi-structured format. This approach entailed the preparation of questions in advance, organised around four principal themes: 1) earnings, 2) copyright, 3) digital technologies and marketing aspects, and 4) other challenges and support. This structured yet flexible methodology allowed for a consistent exploration of key topics initially captured in the survey data across all interviews while providing the space for spontaneous and in-depth discussions. Such an approach facilitated the emergence of organic, nuanced insights beyond the predetermined questions, enriching the dataset.

Following the completion of the interviews, each audio recording was manually transcribed by the interviewers to ensure accuracy and fidelity to the participants' responses. The transcribed data was then systematically analysed against the four main themes previously identified. This thematic analysis provided a structured framework for examining the data, enabling the researcher to identify patterns and variations across interviewees.

To protect the identity of the interviewees, all data was anonymised. Names and any potentially identifying information were removed or altered, ensuring that the insights could be shared without compromising the confidentiality of the participants. Where required, quotations have been lightly edited for clarity.



The indie market



I've made three books in three months. With traditional publishers, I wouldn't do that. With traditional publishers, you can't do certain stuff, with certain people, within this time frame. But I have that flexibility and independence as an indie author. I'm independent.

The appeal of independence

Digital technology has changed every step of book publishing, from writing, to how readers interact with books, and everything in between. Leaving an indelible mark on both traditional and independent publishing sectors, the digital revolution has indeed redefined how content is created, distributed, and consumed, altering the dynamics of the industry and reshaping the roles of the numerous stakeholders involved within it. For indie authors this translated into broader access to publishing tools and platforms, democratising the production and distribution of books, and expanding their reach to a global audience. Notably, it has also increased the speed associated with publishing, meaning that they can bring their work to market faster and more efficiently than ever before.

Highlighting the market's recent growth, our survey findings reveal that the indie publishing market is remarkably young, with 67% of respondents indicating they embarked on their self-publishing journey within the last decade (2014 or later), in a largely 'born digital' demographic.[5]

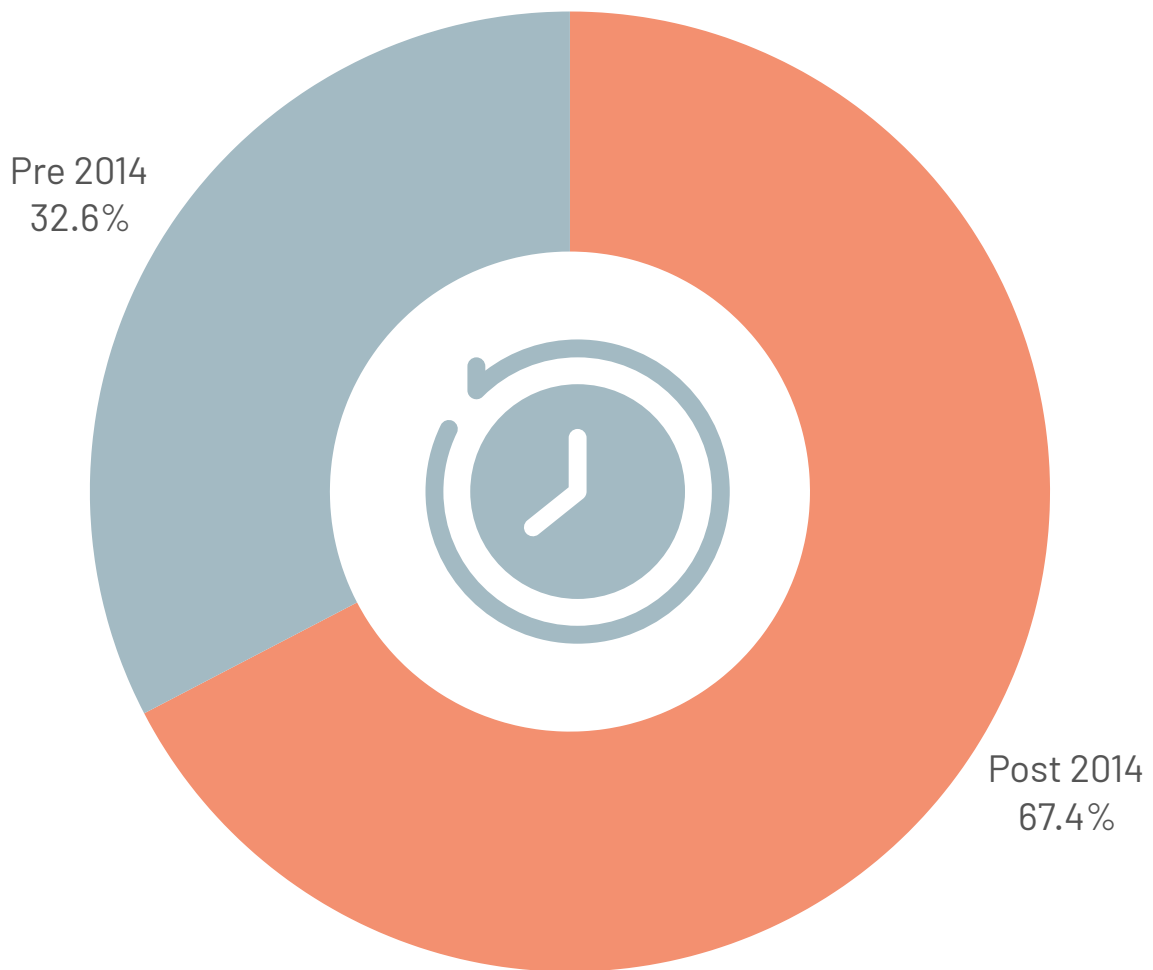


Figure 1: Doughnut chart showing percentage of authors by year started writing

[5] See Thomas, Battisti, and Saenz De Juano Ribes (2023). Indie Authors' Earnings 2023. CREATE working paper 2023/4: <https://www.create.ac.uk/blog/2023/06/21/indie-authors-earnings-2023-the-first-global-study-published/>



Unequivocally, our research found that independent authors are drawn to the indie path because it enables them unparalleled control over every aspect of the publishing process.

This control spans the creative elements, such as writing and editing, and extends to commercial aspects, including marketing, pricing, and distribution. Such autonomy allows for a more intimate connection between authors and their work, and between authors and their audiences, fostering a sense of ownership and artistic integrity that cannot be replicated in traditional publishing due to external editorial and marketing influences.

The financial aspect of indie publishing is another pivotal factor that attracts and keeps many authors in this route. In traditional publishing, authors often receive a relatively small percentage of the book's sales as royalties, typically ranging around 10% for hardbacks, 15% for paperbacks, and 25% for e-books.[6]

See Thomas, Battisti and Kretschmer (2022). UK Authors' Earnings and
[6] Contracts: A Survey of 60.000 writers: <<https://www.create.ac.uk/wp-content/uploads/2022/12/Authors-earnings-report-DEF.pdf>>

Advances, where offered, must be earned back before any royalties are effectively paid to them. In contrast, the self-publishing model offers higher royalty rates, of up to 60% and 70% of the sale price for physical and e-books respectively. This allows indie authors to earn more per sale, in theory making it financially easier to sustain themselves solely through their writing, even if their total sales volume might be lower than what a traditional publishing deal might yield. This aligns with findings from our earlier report confirming that authors affiliated with traditional publishing houses typically earn almost 50% less from their writing annually compared to indie authors. Nevertheless, it is important to note that while the potential for higher earnings is significant in indie publishing, authors bear the upfront costs of production, including editing, cover design, formatting, and marketing. These expenses, typically covered by publishers in the traditional model, can be substantial and represent a risk (and upfront financial loss) that indie authors must manage. Given that the survey data gathered here captures income figures before costs, future research may aim to get a more accurate picture of the toll that up-front costs take on authors' overall earning profiles.[7]



Figure 2: Pictogram depicting typical income difference between indie authors (upper) and traditional publishing authors (lower)

Income data was normalised to GBP in 2022. Readers should be mindful of the differences in population and sample sizes across these samples, and the cost factors for indie authors when reflecting on this comparison.

Control over pricing strategies is also a critical financial advantage for indie authors. They can adjust the price of their books in response to market demand, promotional strategies, or personal objectives. They have the unique opportunity to actively promote their back catalogue, a practice that is rarely pursued in traditional publishing, which predominantly concentrates on newly released titles. Indeed, a traditional publisher managing a large catalogue of books does not necessarily seek to maximise earnings from each individual title. However, when the revenues from the entire catalogue are aggregated, they can represent a significant sum. A telling example of the indie publishing model's efficacy is the story from an interviewee who, despite facing what they estimated was over 100 rejections from traditional publishers, found success through the indie route, and is now able to live off earnings from their writing.

This narrative underscores the potential empowering nature of indie publishing, highlighting how it can serve as a viable alternative for writers who might otherwise be overlooked by the conventional publishing industry.

Nevertheless, it should be noted that, as is typical in cultural markets, indie authors work in a 'winner takes all' market, with a few superstar authors earning a disproportionately bigger take of the total net worth. In 2022, the top 1% earned 1,200,000 USD (which represents 31% of the total revenues) and the top 10% earned 190,000 USD (which represents 71% of the total revenues). This is in keeping with our expectations and follows a similar, if rather heightened, trajectory compared with the traditional publishing market.

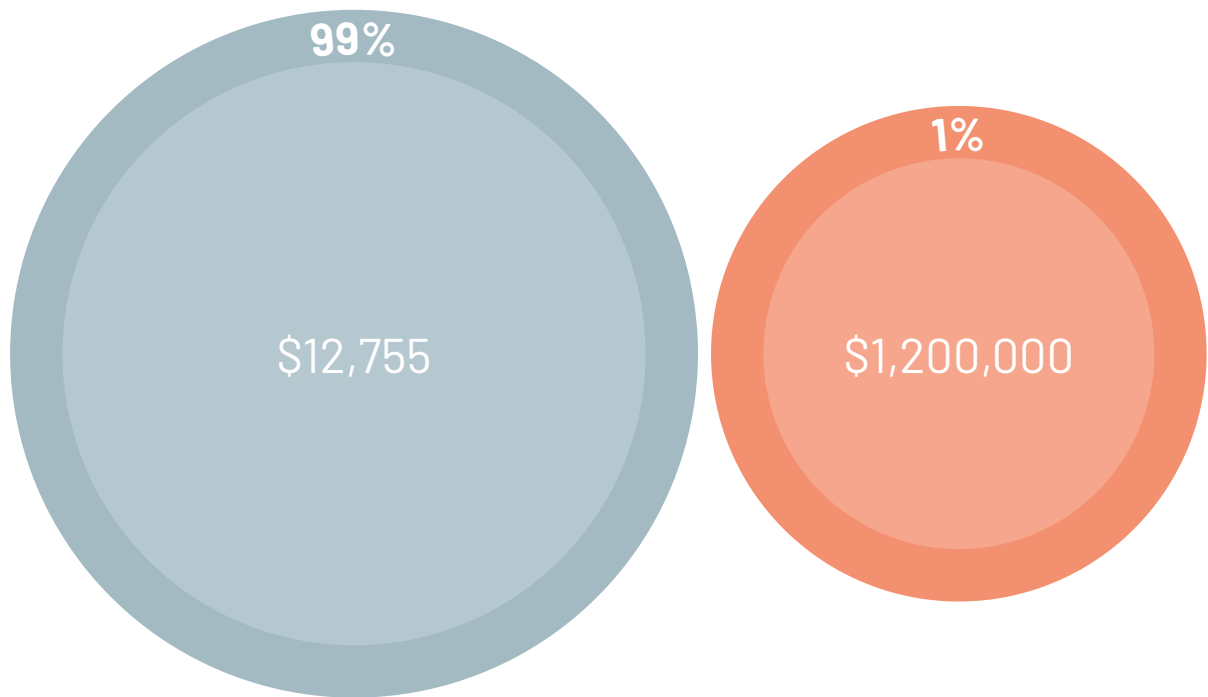
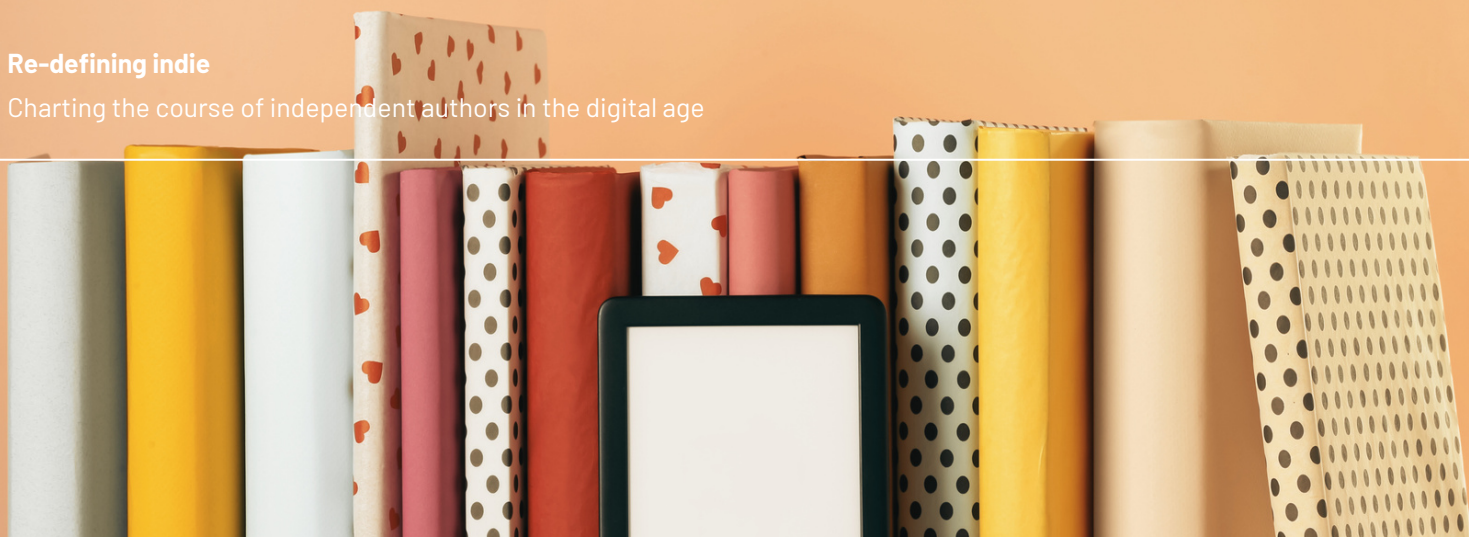


Figure 3: Pictogram depicting difference in income of indie authors

The findings of our interviews suggest that the core driver behind this inequality is the digitalisation of processes that have significantly lowered the barriers to entry for creating and distributing cultural products. As a result, there has been an exponential increase in the volume of content available to consumers. Despite the surge in available content, the capacity of consumers to engage with and allocate attention to this content has remained finite:



Authors were releasing books into a market that just needed more books. There were so many readers and not enough books going out. Now that has changed.



Consequently, while digital platforms have democratised access to publishing and broadened the potential for exposure, they have also intensified the competition among indie authors. This has resulted in heightened emphasis on the quality of marketing, rather than the quality of creative content per se.

A taxonomy of indie authors

“ It did not go well to start with, it rarely does. I had no idea what I was getting into. The reality of the situation was: get the book writing to work or work in retail. And I really did not want to work in retail.

Consistent with trends observed across creative industries, indie authors are predominantly motivated to create by a genuine passion for writing. This intrinsic drive is a fundamental characteristic that unites individuals within the independent publishing sector. Within this spectrum, we identify three distinct types of indie authors.

Emerging Indie Authors	<p>At the outset of their careers, these authors often balance their writing aspirations with the necessity of maintaining a secondary source of income or receiving financial support from within their household. Their indie publishing endeavours are typically modest in scale and may lack professionalism. This group is still navigating the learning curve, gaining familiarity with the industry's complexities.</p>
Mid-Level Indie Authors	<p>Authors in this category have attained a measure of success and recognition. Despite this progress, many still require an additional job or external financial support to sustain themselves. However, they exhibit increasing professionalism and are around the tipping point of a significant breakthrough. With a growing understanding of the indie publishing ecosystem, they are adept at identifying both opportunities and potential setbacks.</p>
Successful or Established Indie Authors	<p>Having reached a significant level of success, these authors can sustain themselves financially through their writing alone. They demonstrate a high degree of professionalism and possess a comprehensive understanding of the industry's challenges and prospects. Often, they strategically diversify their creative and commercial activities beyond traditional book sales. This involves producing and offering content such as educational podcasts, online courses, and even selling branded merchandise. This diversification not only serves as an additional revenue stream but also plays a crucial role in amplifying their presence and influence within the industry.</p>

The common career path for independent authors is to start from the ground up within the industry. They typically build their readership and reputation through their writing, marketing efforts, and engagement with the community, often without prior fame or recognition in adjacent markets. The beginning of their careers is often marked by a phase of trial and error, as they experiment with various strategies and refine their writing. At this stage, support resources and networks are highly valuable for authors. Guidance and support offered by e.g., the Alliance of Independent Authors (ALLi), and various online forums were cited as critical as they offer information on best practices, marketing strategies, and the nuances of navigating the publishing industry. Equally important, indie authors reported appreciating the sense of community that such resources provide, allowing them to share experiences, advice, and encouragement with fellow writers facing similar challenges:

“ It's fantastic the amount of indie authors who are really generous and give their time and knowledge. I would not be anywhere near where I am now without their knowledge and their generosity.

In some instances, we have identified authors who enter the indie publishing industry already possessing a degree of success from other fields or platforms. These individuals leverage their existing audience and the attention they have garnered elsewhere to boost their book sales in the indie market. Two notable examples from our interviewees include social media influencers, who have garnered significant followings around other types of content, and renowned academics, recognised for their contributions to their fields.



Market structure

“ I have so many different baskets, and my eggs are everywhere.

The modern independent publishing industry can be conceptualised as a multifaceted ecosystem, comprising various interconnected elements that contribute to the journey of a book from its inception to the hands of the reader. The conceptual mapping below offers an overview of the key actors and processes involved in bringing a book from idea to readers. It represents a synthesis of the key elements identified by indie authors, acknowledging that there may be additional, less prominent facets not captured in this representation.

The author is positioned centrally, symbolising their pivotal role and control over the entire publishing process. Surrounding the author are the critical stages of creation, production, distribution, sales, marketing, and support, highlighting the interconnected roles of the services involved in these different stages. The arrows depicted on the graph illustrate a sequential linear flow in the independent publishing process, highlighting the progression from creation to the eventual presence of works on sales channels.

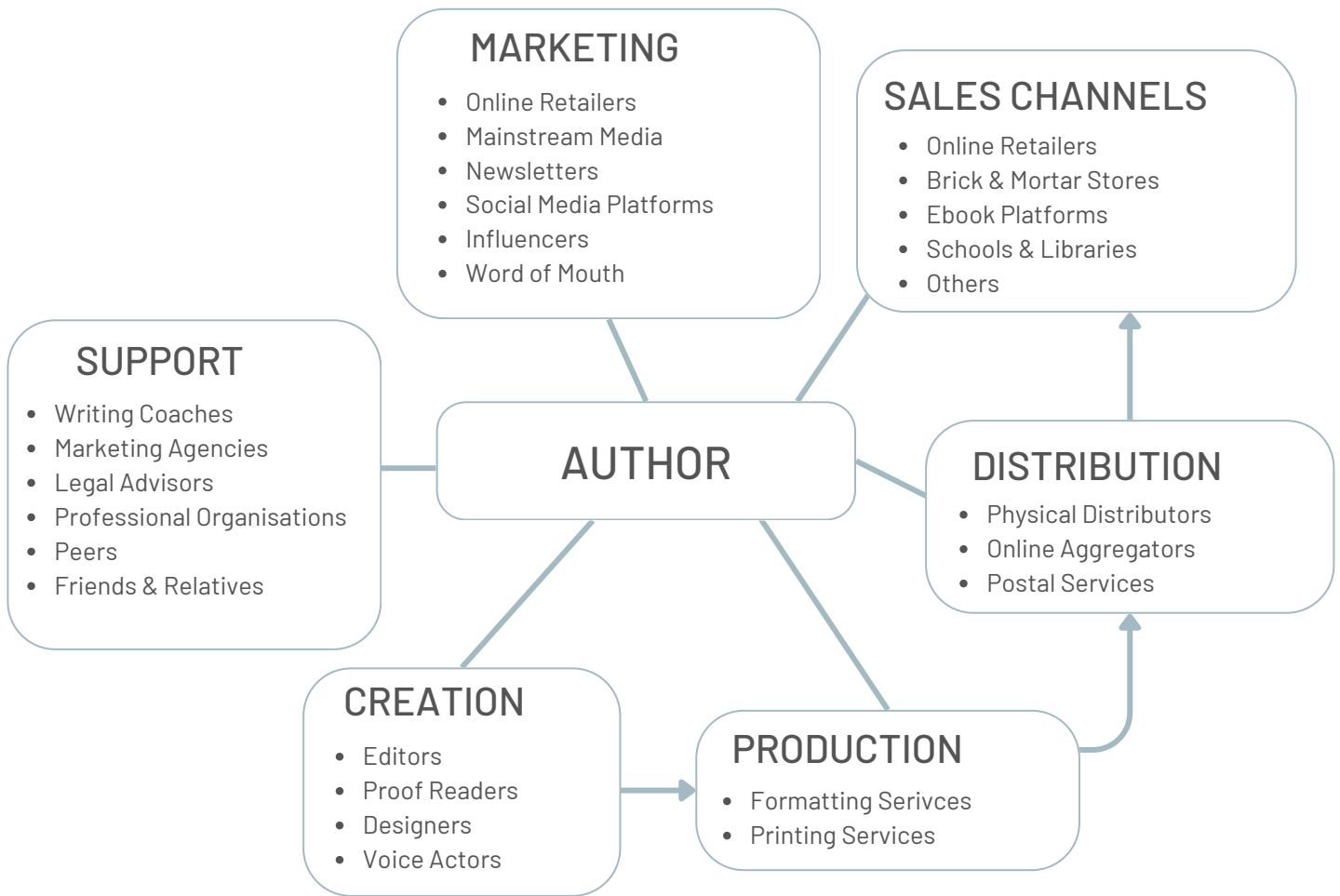


Figure 4: Conceptual mapping of indie market

This delineation suggests that each of these phases must be concluded before proceeding to the next. It is important to recognise that the array of services outlined are not uniformly used by all indie authors and are influenced by their specific needs, career stages (i.e., position in the taxonomy), resources, and strategic goals.

This variability underscores the flexibility and adaptability of the indie publishing model, allowing authors to tailor their publishing strategies to best fit their individual aspirations and circumstances.

The same entity often provides more than one of the services described here, covering aspects of creation, production, distribution, marketing and support, covering aspects of creation, production, distribution, marketing and support. Their intent is to furnish a comprehensive suite of services that addresses many of the requirements of indie authors in order to keep them within the boundaries of their expertise (i.e., writing) and maximise their revenues. Thus, whilst the singular, romantic author figure (or 'lone genius') is omnipresent in theories of traditional literary publishing, our findings of the indie market reveal that indie authors are not solitary by nature, and are instead supported by various sources of creative labour. In addition to the typical paid services such as editors or designers, authors regularly 'crowdsource' advice, editing, marketing support and writing strategies from family ("*They say you should never let family edit your work. They haven't met my sister*"), friends and other members of the indie community.



We have a group of writer friends, both indie and traditional people who want to be traditionally published, and we get together on Discord and have writing sprints.

Whilst not strictly co-creatorship, the indie market does evidence a system of loosely organised supportive creative labour. This appears to be in an effort to fill the void of services otherwise offered by traditional publishers, such as editing, marketing etc., and an acknowledgement that 'creative' labour is broadly conceived in this market, not just as authorial, but a diverse skill set required to sustain a career and bring a book to market.

However, our findings reveal that the experiences of indie authors with ancillary professional services vary widely, being of diverse nature and quality. While many authors report positive experiences, benefiting from professional and valuable assistance, others face challenges that range from inconsistent quality to fraudulent practices. The most common issues faced by our interviewees include repeated solicitations for additional payments for services that should be included in the original agreement, offers of services with hidden costs, non-payment of royalties, lost shipments, or dubious quality checks. Indie authors often find themselves at the mercy of such services, and have limited recourse. These issues are particularly pronounced for authors at the beginning of their careers, as the aspiration for success combined with their lack of experience can lead them to be more susceptible to deceptive practices. Given how interrelated the indie author's relationships are with these emerging services, there is a risk of diminishing autonomy by creating intermediary dependency.

Technology



If I stop running ads, I don't sell any books.

Marketing and platform dependence

Throughout our interviews, there is clear evidence that indie authors now find themselves deeply reliant on digital platforms for both marketing and selling their books. This shift towards digital dependency reflects the evolving landscape of the publishing industry, where online marketplaces, social media, and e-book distribution services have become central to an author's ability to reach audiences and generate sales. The market is characterised by a significant degree of concentration, with a handful of platforms capturing a large portion of the market's total revenue and visibility. As a result, the vulnerability of authors to changes by these platforms, which can exhibit quasi-monopolistic characteristics, becomes more pronounced.

According to our interviewees, marketing is the most crucial factor impacting book sales. Authors are compelled to utilise digital platforms that offer in-built marketing services, and invest substantial amounts of money in the process - often representing their primary area of expenditure. The most common marketing strategy is cross-platform, with indie authors running ads on Facebook in order to sell books on Amazon. As interviewees commonly reported difficulty tracking ad-performance across these two platforms (despite Amazon providing a way to track off-Amazon ads, since 2022), they evidence considered, and risky, marketing strategies to substitute for each platform's deficits.

Some interviewees reported creatively repurposing Amazon affiliate links, designed to earn a commission for third parties, rather than tracking one's own ads. This practice, explicitly banned by Facebook's policies, is resorted to, despite the risk of account suspension.



The general impression from our interviews is that indie authors are caught between the competing and conflicting interests of digital platforms, each advancing their own exclusivity by promoting their own ads or marketplace, rather than interoperability.

Beyond traditional paid marketing efforts, indie authors are increasingly turning to social media like Instagram and TikTok to create content related to their books (e.g., the influencer economy, 'BookTok'). By engaging audiences with such visually appealing and creative content, authors aim to capture attention and drive book sales in a more organic manner. This approach also allows authors to build a community around their work, leveraging the viral potential of these platforms to increase visibility without the hefty price tag associated with paid, targeted advertising.

In both cases indie authors are vulnerable to changes beyond their control, such as adjustments to platform algorithms or increases in advertising costs:



I do run some Amazon and Facebook ads but neither one of those are performing at the moment. It really depends on the time of the year and what they've done with their system because it comes and goes.

On the other hand, for distribution, Amazon plays a significant role in the realm of independent publishing. Its Kindle Direct Publishing (KDP) service is widely utilised by indie authors, making it a cornerstone in their publishing strategy. Many authors enrol exclusively with Amazon through KDP Select (as opposed to 'wide' publishing) to be included in Kindle Unlimited (KU), Amazon's e-book subscription service. This means that a book cannot be sold on other platforms but promises greater revenues as well as increased exposure on the platform. Indeed, this strategy is confirmed as more profitable in our survey data when compared with wider self-publishing routes.

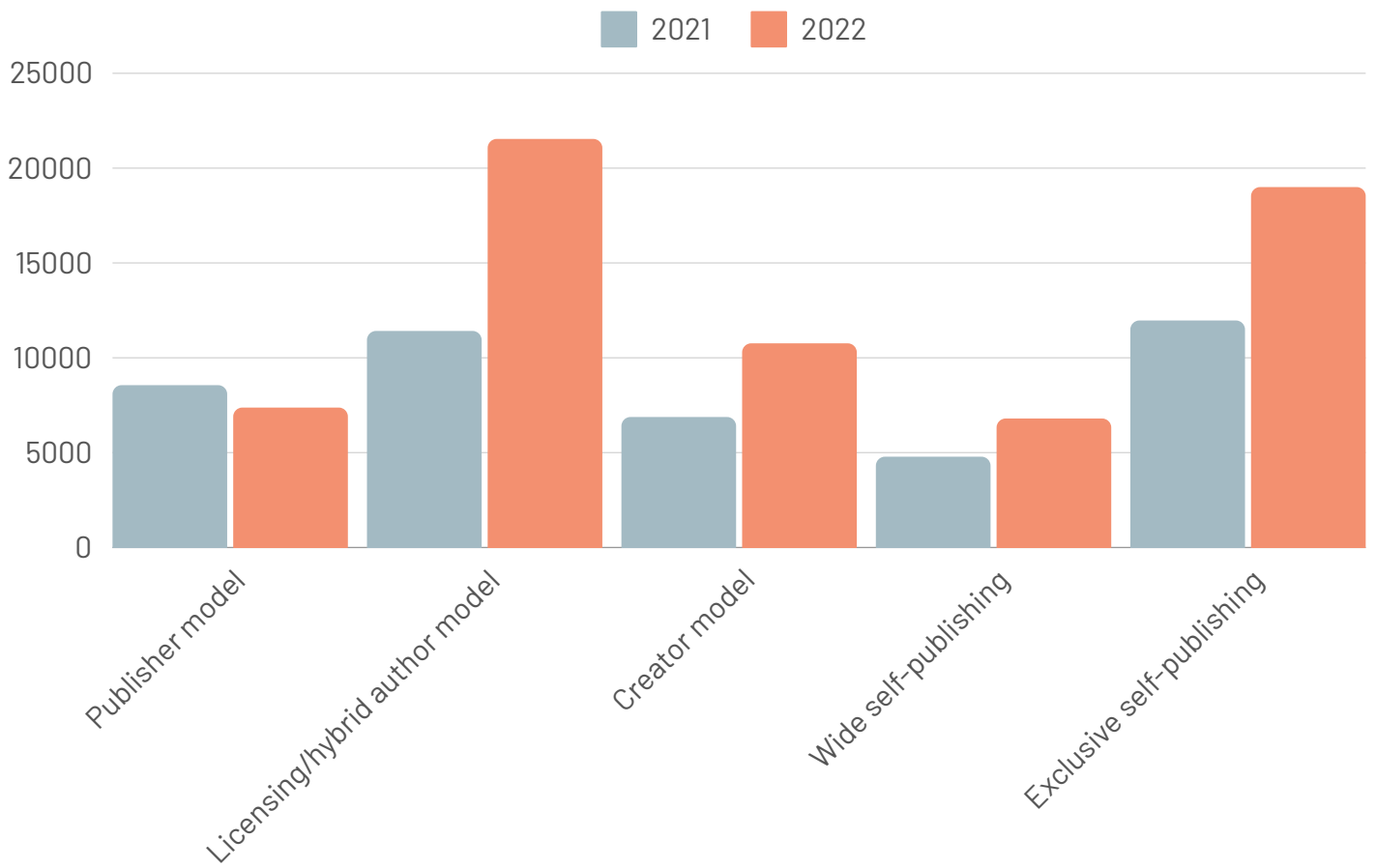


Figure 5: Bar chart showing typical income associated with publication method (USD 2022)

Nonetheless, and whilst our interviewees generally report positive experiences, we also find indications of creeping platform power which effectively replicate the discrepancies in bargaining position we find in traditional publishing:



I've not really had any problems with Amazon, I find it absolutely fine. But there's no negotiating with Amazon. What they want, they get.

Given some authors' significant dependence on Amazon for revenue generation, any changes in terms and conditions, such as adjustments to royalty rates or delivery costs (which also applies to e-books and are calculated based on the file size), have the potential to markedly affect their earnings. Beyond direct - and non-negotiable - changes to terms and conditions, Amazon also uses its market dominance to subtly shape practices within the independent publishing sector. For example, despite the illegality of price fixing in many jurisdictions, Amazon imposes constraints on independent authors through its pricing policies for e-books. To qualify for a 70% royalty rate, authors must price their e-books within a specific range: between \$2.99 and \$9.99. Should the pricing of an e-book fall below \$2.99 or exceed \$9.99, the royalty rate is reduced to 35%. These pricing thresholds are set unilaterally by Amazon, without external regulation, underscoring the platform's significant control over the financial aspects of e-book publishing.[8]

This situation, where such policies can impact indie authors' careers, presents an issue that merits further examination by competition scholars or similar experts to assess its implications on market fairness and regulatory compliance. Further, while interviewees overwhelmingly focussed their discussion on Amazon, we note that similar challenges may arise with other dominant platforms within their specific market segments.

Amazon frequently finds itself the subject of regulatory scrutiny due to concerns about its potential anti-competitive practices. See Cain (2021). Amazon.com and 'Big Five' publishers accused of ebook price-fixing.
[8] <<https://www.theguardian.com/books/2021/jan/15/amazoncom-and-big-five-publishers-accused-of-ebook-price-fixing>>

Content moderation



We all live in fear of the bots.

The entrepreneurial indie author navigates the dual challenges of writing in two distinct genres: books and advertisements, both of which are subject to the moderation policies of digital platforms. These moderation practices, aimed at maintaining the integrity of the platform by filtering out spam and offensive content, can inadvertently pose difficulties for authors. Reports of negative experiences, such as book takedowns and account suspensions, have been shared among the indie community, both through direct experiences and anecdotes on online forums. These discussions often resemble 'algorithmic gossip',[9] a process through which a community attempts to decode the opaque digital practices and policies of tech companies.

The introduction of transparency regulations, like the EU Digital Services Act (DSA), holds the potential to bridge the gap between creators' comprehension of platform operations and the actual practices employed by these platforms.

For the indie authors we interviewed, a typical moderation issue is over-enforcement. An example involves Amazon's KU program, which requires books to be exclusively available on Amazon. Some indies have faced penalties for instances where pirated copies of their work appear on other sites[10], despite such occurrences being beyond their control and in direct opposition to both their interests and Amazon's. This scenario highlights the limits of automated enforcement mechanisms that fail to discern context, inadvertently placing authors in a precarious position.

[9] Bishop (2019). Managing visibility on YouTube through algorithmic gossip. *New Media & Society*.

[10] Van Der Sar (2023). Amazon Removes Books From Kindle Unlimited After They Appear on Pirate Sites. <<https://torrentfreak.com/amazon-removes-books-from-kindle-unlimited-after-they-appear-on-pirate-sites-230206/>>

Moderation also extends to the content within indie published books. An instance reported by one of our interviewees involved a historical novel set in the 18th century, which was removed for featuring duelling pistols, purportedly violating a platform's (based in the US) regulations against content featuring guns. This situation not only underscores the frustrations of dealing with inappropriate content moderation but also illustrates how authors can become unintended casualties of broader cultural debates, in this case, America's discourse on gun control. Content moderation policies will extend to the (ostensibly valuable in the words of our interviewees) advertisement and marketing content. Data from the Digital Services Act (DSA) transparency database reveals that Amazon is removing books and their advertisements at similar rates, with a cumulative 59,146 books and 53,254 book advertisements taken down.[11] On a content level, 5,558 of these ads were removed for violating Amazon's policy against overly provocative advertisements for romance books[12].

Interestingly, every moderation issue reported by our interviewees was ultimately resolved in their favour, presenting a more positive outlook compared to the typical narrative with online platform moderation where individual users feel powerless.

[11] DSA Transparency Database, consulted on 25 February 2024, These numbers refer to Amazon's enforcement regarding all books and book ads, not just indie ones. <<https://transparency.dsa.ec.europa.eu/>>

[12] Amazon states that "Ads for Romance books may only feature minimal provocative content. Ads must not contain nudity, overt sexuality, clearly prurient content, or sensitive words and title" <<https://advertising.amazon.com/en-us/resources/ad-policy/book-ads?#romance>>

Furthermore, complementing this finding with the DSA transparency database, we can dispel, or at least nuance, the myth of bots crawling in search of content to take down in the indie market (to the extent that Amazon is a proxy for this given its salience). Out of 12,804 violations of Amazon's offensive content policy, only 3,907 were automatically detected. Similarly, out of 36,670 intellectual property infringements, only 265 were automatically detected. Through this combination of data, it is possible for independent authors to gain a better understanding of the platform moderation practices that directly affect them.

Use of AI



I fired my editor for using AI tools.

The recent development of generative AI tools over the past year with tools enabling the creation of textual, audio, visual and audio-visual content has sparked vivid debate within the indie community. Spanning from hard line opposition to enthusiastic experimentation, authors' views vary widely.

As illustrated by the quote above, a segment of authors are strongly, morally, opposed to AI tools, viewing them as a challenge to the inherently human aspects of writing. These authors perceive AI-generated writing as lacking human qualities - namely, warmth and depth. Nonetheless, many of our interviewees have experimented with generative AI for some aspects of their work. Primarily, this is for 'seasoning' of existing work, such as generating new ideas for environments or characters, and building more substantively around those initial concepts. Moving away from the core task of book writing, authors described AI as a substitute for 'grunt work', such as helping to write a blurb.

All of our interviewees' confirmed that they view AI as increasing the risk of labour displacement; likewise, they opposed the wholesale replacement of authors by AI for two reasons. Firstly, the lack of human creativity creates a moral opposition to AI-generated books on the market as humans should be the primary beneficiaries of readership and associated rewards. Secondly, that generative AI simply lacks quality, with one interviewee envisioning the possibility of an AI authored "pretty boring book".

Whilst authors maintain an implicit hierarchy between 'human made' and AI works, the increasing accessibility, and further development of AI runs the risk of disrupting the broader ecosystem of indie publishing. Indeed, such tools will likely cause labour displacement for creators and performers responsible for other aspects of the book such as cover design, proofreading, or voice acting. This consequently raises the possibility of creating a hierarchy among creators in their respective speciality, further isolating them from the rest of the creative sectors. For instance, some interviewees reported employing AI to create complementary or derivative works related to their books. This includes, automated voicing of audiobooks, or using AI-generated art for book covers or advertisements:



I went to a seminar about generative AI images and it suddenly was like the scale fell from my eyes, and I thought, this is how you do ads. It's really hard to get good imagery for adverts, but they showed us exactly how you generate the sort of image you want to put in a Facebook ad... Fantastic, I immediately signed up for an account with Midjourney.

In this respect, AI tools offer authors the capability to create visuals that are potentially more appealing than those they could produce on their own. This feature proves beneficial to some authors in creating content for social media, enabling a dialogue with their audience beyond mere textual media. Nonetheless, when it comes to book covers, a crucial, commercially significant, component of a book, the importance of professional designers was a recurring theme. Many respondents expressed a lack of confidence in tackling this task on their own, even with the assistance of generative AI. This indicates that, as of now, there is clear appreciation for human-made design and, by extension, human labour for tasks that matter.

At the same time, there is an open question on whether the use of generative AI for creating complementary visual or audio work could be beneficial, overall, for accessibility. While indie authors are generally supportive of these efforts, they sometimes find the cost of employing other professional creators and performers to be a barrier, leaving generative AI as a viable alternative for accessible formats (this is particularly true for emerging and mid-level authors). This would suggest that whilst other creative labour is not being displaced per se (if it was not being 'bought' in the first instance, it cannot be lost), there are ongoing issues with supply and price forbearance which may be to the detriment of the collective, supportive labour that has been a characteristic of in the indie market to date:

“

I've always wanted to be able to do audiobooks, and I've never been able to afford it, because they are fantastically expensive - you have to hire an actor and a studio and all the rest of it. It's very tempting to say, well, let's give AI audio a go.

Audiobooks represent a prime example for this dynamic, as there is a general eagerness to get into this fast-growing and ostensibly more profitable market, as a prime source of income generation for indie authors (28% of authors report deriving licensed revenue from audiobook licences, being the most profitable category of all licences surveyed).

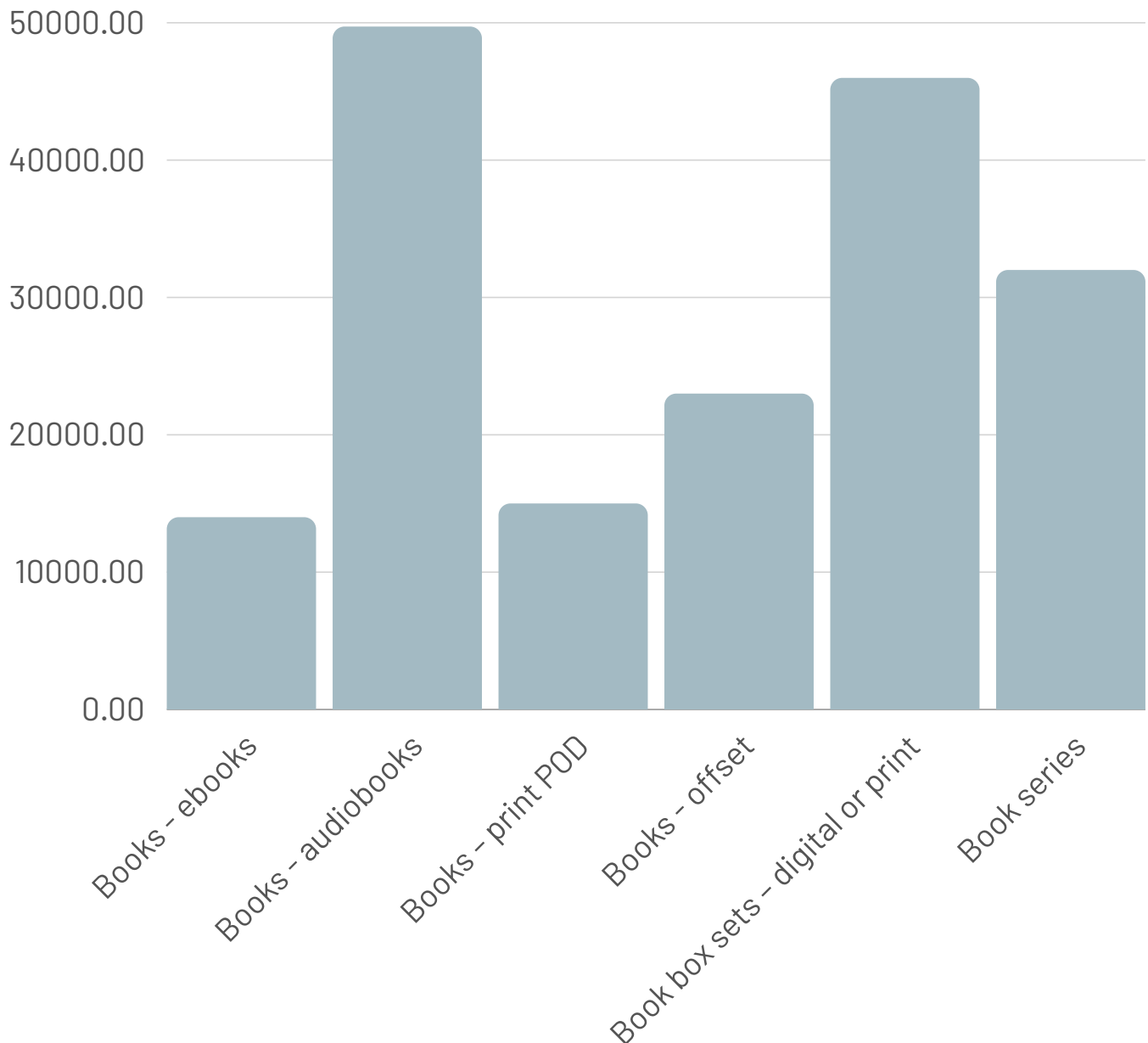


Figure 6: Bar chart showing typical income associated with publication type (USD 2022)

However, the cost of production for audiobooks is typically high, upwards of £1500, which in turn increases the potential reward of AI-displacement. In response, adopting strategies like engaging celebrities to voice audiobooks may offer potential benefits, as the appeal extends beyond the format itself.[13] However, such a strategy does little to recoup lost opportunities for professional, non-celebrity voice performers.

Furthermore, authors, as other creators, are currently at the centre of intense debates surrounding the regulation, and sometimes the prohibition, of AI-generated content. Amazon, for example, makes a distinction between AI-generated content, which needs to be disclosed by authors, and AI-assisted content, which does not. Although Amazon has not specified the consequences of using AI-generated content, authors perceive this requirement to disclose as an implicit ban. Conversely, some authors have experienced the benefits of free AI-voiced audiobooks offered by platforms aiming to expand their market presence in this segment. This situation reflects a common pattern in technology adoption, where initial integration often leads to concerns about obsolescence and displacement of traditional methods.[14]

To conclude, AI is a disruptor that brings both challenges and opportunities and further research is needed to precisely assess its impact. Until then, we stress that any community norms on the use of AI should be considered with the collective welfare of the indie market in mind, rather than the author in isolation.

[13] Power (2023). AI is coming for your audiobooks. You're right to be worried. <DSA Transparency Database, consulted on 25 February 2024, These numbers refer to Amazon's enforcement regarding all books and book ads, not just indie ones. <<https://transparency.dsa.ec.europa.eu/>>>

[14] Cecco (2023). Death of the narrator? Apple unveils suite of AI-voiced audiobooks. <<https://www.theguardian.com/technology/2023/jan/04/apple-artificial-intelligence-ai-audiobooks>> <<https://authors.apple.com/support/4519-digital-narration-audiobooks>>

Creative production



If I read about another retired CIA agent, always a white man... I'll puke.

Diversity

In this report, we do not focus solely on rates of production and high earnings as a metric of success but take a deeper dive into the quality of production within the indie market. With the absence of traditional gatekeeping mechanisms, we explore whether this leads to greater diversity and plurality in terms of both the authors entering the indie space and the variety of content they produce.

We anticipated that the lack of a formal gatekeeper, such as a publishing house, would also mean a lack of embedded interests and systematic bias in the selection of content which receives success in direct-to-reader indie publishing models. In theory, this could lead to a 'gateway' to success for creators and genres that would otherwise struggle to receive mainstream support.

As mentioned above, one of our interviewees confirmed that, before going on to have a successful indie career, they were rejected in virtually all of their pitches to traditional publishers for the same content. And indeed, our interviewees were unanimous in preferring indie publishing over traditional, whether being 'born indie' or 'migratory' from traditional publishing, specifically because the lack of moderation allows them to be 'imaginative' in their work and bypass what is perceived as the implicit 'privilege' of traditional publishing:



Editors in traditional publishing, they're all in their early twenties, got an English degree from York or Cambridge, or wherever, and they're all white middle class, and they're the people who are gatekeeping what people should read. And I just don't think it's right.

Even accounting for changes across time, we find no substantial difference in the levels of diversity in the demographic profile of indie authors regardless of whether they are 'newer starts' (beginning writing post-2014) or 'older starts' (beginning writing pre-2014). Across these categories, the levels of diversity are equivalent in respect of gender, levels of education, ethnicity, and sexual orientation. This suggests that diversity is not something that the indie market has 'grown into', but rather has been 'in built' since its inception.

In our initial report, we found that many of the trends typical of the traditional publishing market were subverted, in part suggesting that the lack of traditional gatekeeper does indeed facilitate a more diverse market. We found a reverse gender gap, with cisgender women both more present in the market, and typically earning almost 41% more than men. We also found that LGBTQIA+ authors earned more than their straight counterparts, a difference of almost 20% - as well as accounting for a higher percentage of the indie author population than in the general population.

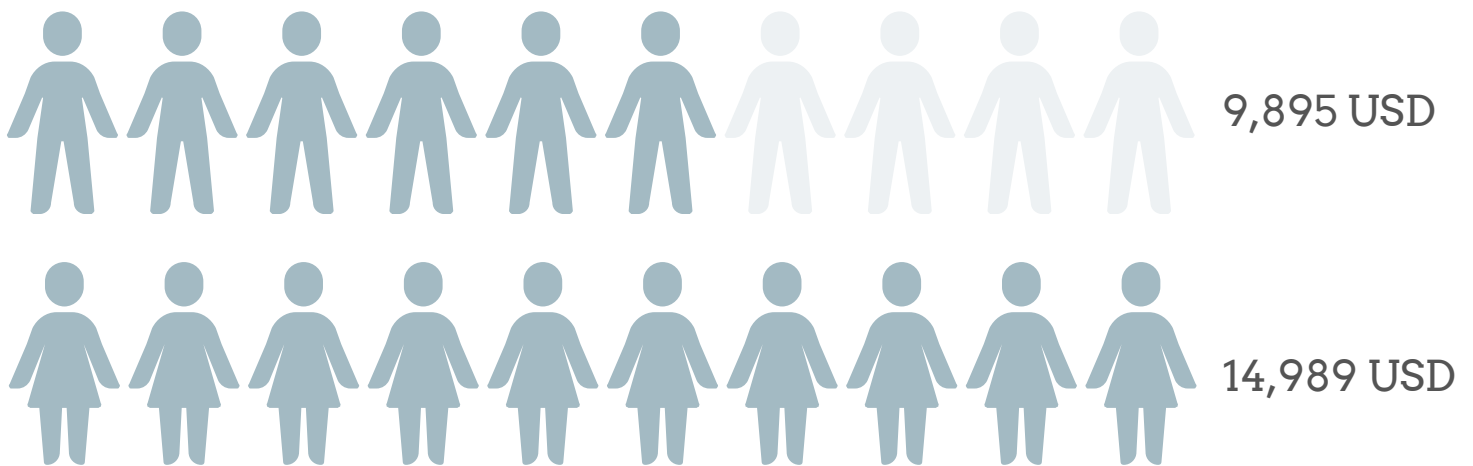


Figure 2: Pictogram depicting typical income difference between cisgender men (upper) and cisgender women (lower) (USD 2022)

Nonetheless, we found that systematic barriers to success remain with certain demographic groups, suggesting a persistent discrimination beyond strategic choices of publishing model. We found that black authors were overall less visible on the market - making up only 59 respondents when compared to the 1,587 white authors - and that white authors were typically earning four times more than black authors. Likewise, we saw similar patterns when testing the effect of disability on typical incomes: authors with disabilities earned around three times less than able-bodied authors.

If 'imagination' is not a barrier in the indie market, what other factors may explain the difference in earnings between other marginalised groups?

Here, we consider the differences in the demographic and professional profiles of LGBTQIA+ indie authors, a demographic faring comparatively well when compared with the broader indie population, and black and disabled authors. In doing so, we attempt to control for professional profile differences to exclude the possibility that, for instance, black authors exclusively use one type of (less profitable) business model. These figures should be treated with a degree of caution, not only because of the different volume in respondent sizes for each demographic group, but also because different aspects of identity are not interchangeable per se.

In our analysis, we find that there are no substantial differences between the professional profiles of LGBTQIA+, black, and authors with disabilities, which would suggest that strategic business decisions are not the primary factor behind lower income for these groups. Marginally, black authors use the wide self-publishing model (46%) more frequently compared with authors with disabilities (34.45%) or LGBTQIA+ authors (30%); our quantitative survey found that the use of wide self-publishing models was correlated with lower income overall compared with e.g., exclusive self-publishing.

We also find that black authors (26.23%) and authors with disabilities (16%) more frequently rely on speaking and appearances as a source of income compared with LGBTQIA+ authors (9.5%). This would suggest that for 'visible' inclusivity, people are willing to pay more, thus making speaking and appearances a more viable source of income. This performative inclusion risks masking the exclusion experienced by these groups.

In respect of demographic variables, our analysis reveals how our groups of interest, LGBTQIA+ authors, black authors, and authors with disabilities, are in fact more similar than different. Again, we find no significant difference in demographic variables between these groups, with the only noteworthy finding that each of these groups are much younger than the general indie authors population and their immediate comparators.

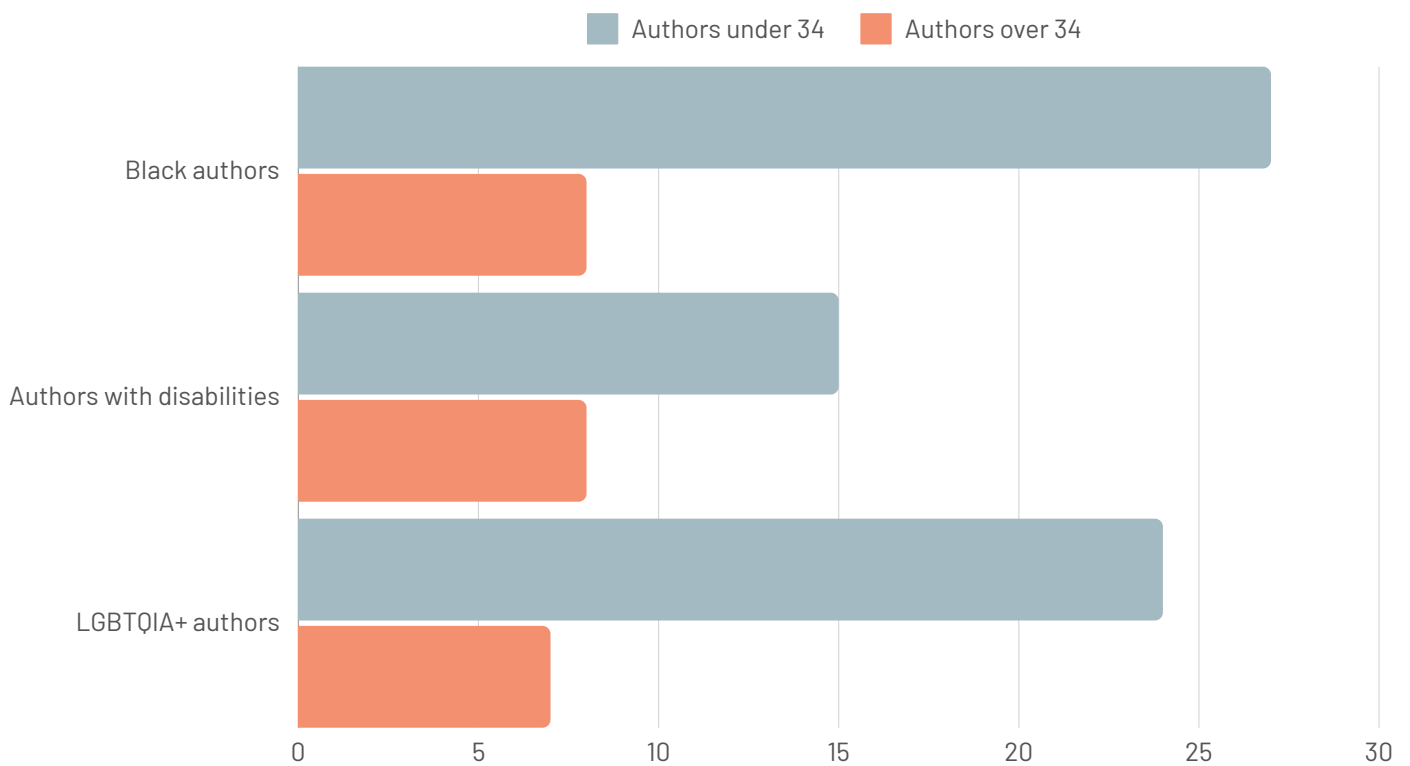


Figure 2: Bar chart showing percentage differences between demographic groups of authors in different age groups

We also find that, in contrast to LGBTIA+ authors (36%), black authors (48%) and authors with disabilities (46%) more frequently have a postgraduate degree. These figures are also higher than for white authors (41%) and able-bodied authors (43%). Cumulatively, this suggests that whilst black authors and authors with disabilities have higher levels of education and are 'just as young' as LGBTQIA+ authors, this factor does not necessarily translate to any material benefit in earnings.

A final noticeable finding about the demographic profile of black authors is in respect of location: the majority of black authors are from the US (61% of all black respondents). We find that for those respondents, typical incomes are very low when compared with white authors, and indeed the general population of indie authors (2,000 USD per annum). However, and whilst we caution against the lower response rates from other locations, we find that this trajectory is reversed in Australia, New Zealand and Europe. There, black authors earn meaningfully more than both white authors and the general indie authors' population.

Whilst the response rates are too low to confirm definitively that black authors will earn more in other parts of the world, there is certainly the impression that the overall low income trajectory for American black authors has an explicit tie to the broader US climate of race and ethnicity.

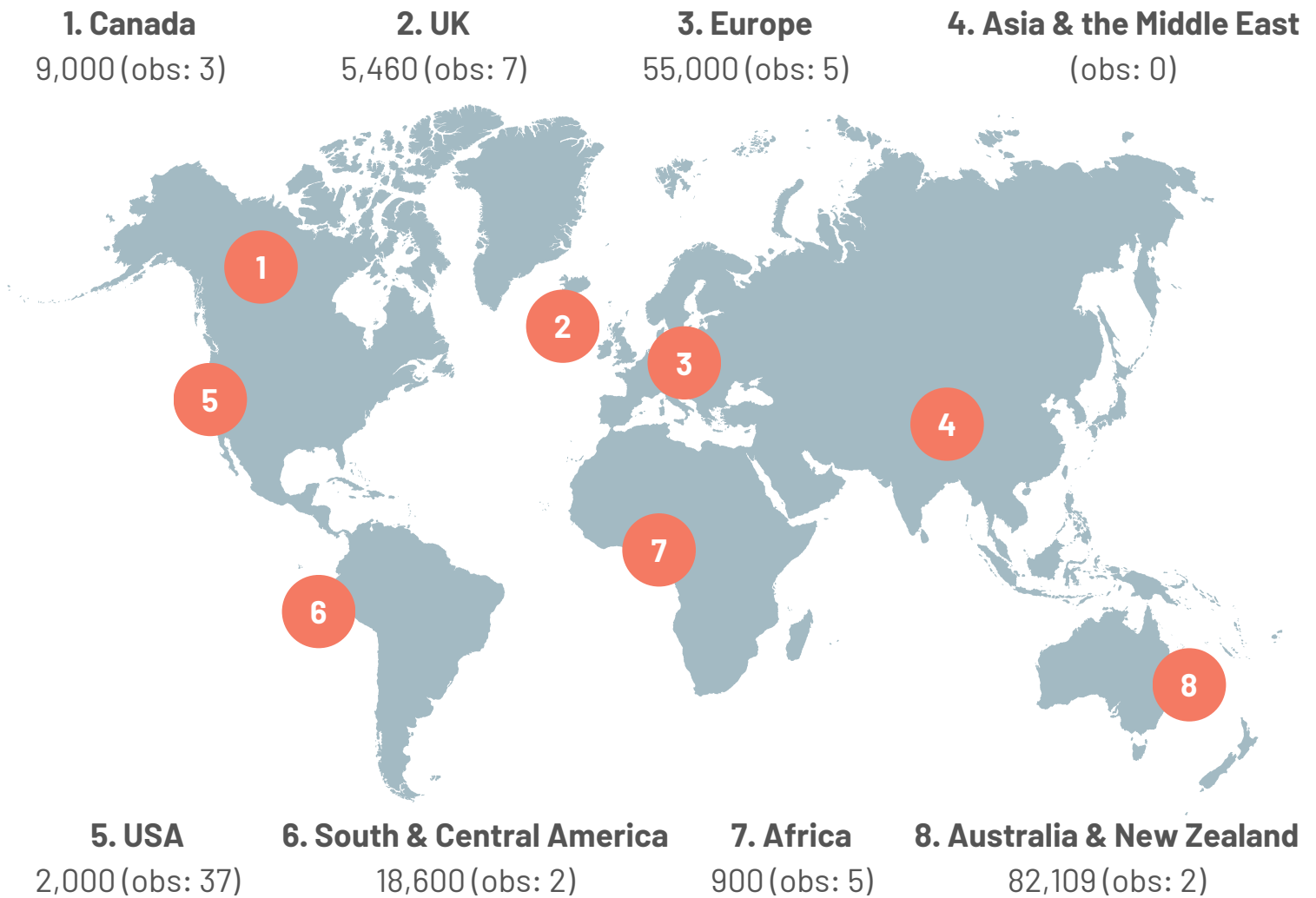


Figure 2: Map depicting typical income (in 2022 USD) for black authors across different locations

Furthermore, we note that overall, the number of authors with disabilities account for 11% of the total respondents to the survey. As 43% of respondents are aged 55 or over, we anticipated that these may account for ‘acquired’ disabilities, developed during the author’s lifetime. However, in assessing differences between different age groups, we find that, whilst 7% of ‘older start’ authors (defined as those starting their career pre-2014) have disabilities, this increases to 10% of ‘new start’ authors (defined as those starting within the past decade - 2014 or later).

Given the differences in the sample sizes between these groups (1494 vs 724 respectively) and typical age, this suggests that younger authors with pre-existing disabilities are actively joining the indie market at an early stage. This may in part be due to the flexibility of working conditions offered for indie authors with disability challenges outside of a fixed, physical place of work in a more traditional career trajectory.

Notably, the LGBTQIA+ community writes almost exclusively for the LGBTQIA+ genre, accounting for 86% of the authors in this genre. Whilst this ensures authenticity to the genre - that, for the most part, those writing about LGBTQIA+ experiences are themselves LGBTQIA+ - we do raise the question of whether the insularity of this community leads to a cyclical conclusion: does the distinct genre exist because of the LGBTQIA+ authors writing for it? Or, are there more LGBTQIA+ authors in the market because there is a distinct genre to write for? In future research, consideration should be given to the use of this genre as a metric compared with those that do not have an explicit demographic tie (e.g., fiction or nonfiction).

We find that some demographic factors, especially ethnicity, are perceived as more portable facets of identity by people outside of that demographic. For example, unlike the 'insularity' of the LGBTQIA+ indie community, white authors regularly experiment with characters and genres with people of colour, as illustrated by one of our interviewees:

“

I wanted to explore the dynamic of being a person living in America who doesn't look like me.

This decision reflects a commitment to authenticity, with authors drawing not only from their personal experiences but also lending credibility to the diverse realities beyond their own lives (such as writing about identities they do not share or places they have never visited). We advise careful consideration of the boundary between artistic or progressive decisions and strategic marketing choices, highlighting the complex relationship between the creative process and the incorporation of diversity or inclusivity in writing. For instance, the decision by white authors to feature characters of colour is often cited as a response to 'underserved niches', a strategy informed by analysing reader data. While the representation of diverse ethnicities in indie works is undoubtedly beneficial, it does not necessarily facilitate the entry or career sustainability of more authors of colour in the industry.

Future research and policy initiatives should focus on reducing the barriers to marginalised demographic groups, particularly authors of colour and authors with disabilities, and to actively support them in their indie career. An open question remains on the relationship between the salience of genre on attracting a diverse writing population: if 'people of colour' was a distinct genre on the indie market, would this attract more authors of colour? Or is the existence of the genre dependent on a pre-existing supply?

Copyright and Rights Management



I am thankful it exists but if you were to quiz me about it right now I would fail.

Lastly, a key component of creativity in the indie market is understanding how underlying rights support or sustain creative careers.

The primary legal mechanism through which this is achieved is copyright that, through the award of a bundle of exclusive economic and moral rights, theoretically offers authors a route to financial reward. In our previous studies on the traditional publishing market, we found that copyright was an omnipresent consideration, and a particularly useful legal tool in the context of non-negotiable contracts often offered by publishing houses.

Unlike our previous surveys of the traditional publishing market, which include measurements of authors' confidence in their knowledge of copyright, the research design employed here captured whether copyright has been accounted for in the wills or estates of indie authors, making it difficult to compare with the broader writing population. Nonetheless, this metric can be used as a proxy for its importance to an author in the broader context of their finances and professional life. We found that consideration of copyright is relatively absent for the majority of independent authors – only 24% have considered copyright in their will or estate, and authors who have accounted for copyright in their will or estate typically earn more than those who do not.

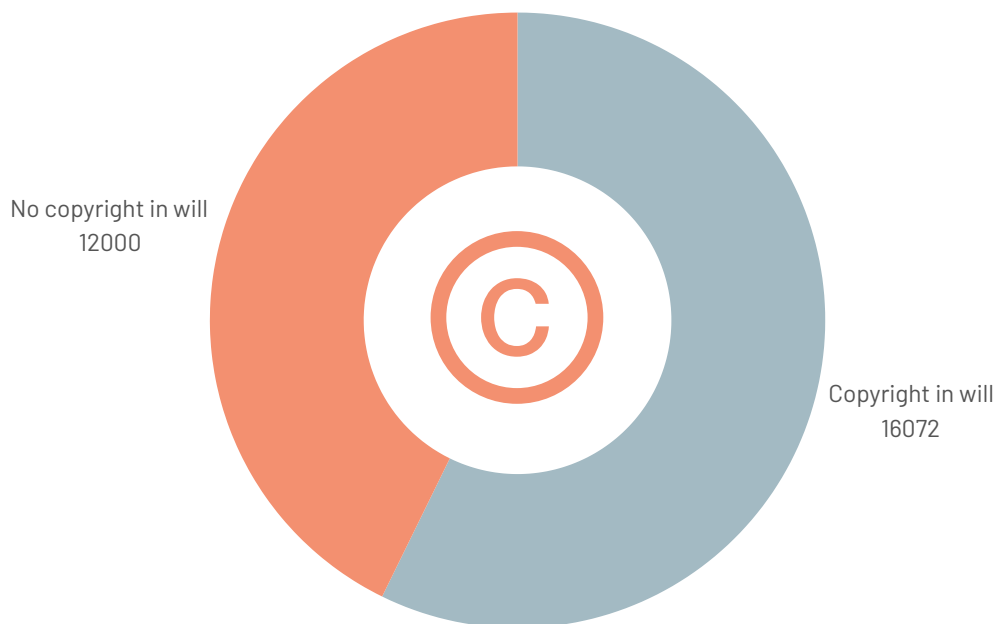


Figure 2: Doughnut chart showing typical earnings for authors with and without copyright in their wills (USD 2022)

This finding underlies a recurring theme that arose throughout our interviews: copyright is a tool for the rich.

For the most part, and despite underlying the fundamental transactions between authors and the platform distributing their works, copyright is invisible. Most authors tie their leverage of copyright to their success and income, claiming that “I’m not making enough to merit a copyright”. Those authors who perceive themselves as being less successful are also less likely to enforce their copyright if they find their works are being used elsewhere without their authorisation, as exposure may be worth more than a supposed lost sale. This is broadly supported by our survey findings which suggest that licensing of rights explicitly enabled by copyright are overall underutilised as a source of income by the majority of authors. The conclusion is that successful authors have a more sophisticated use of copyright through stricter enforcement, using automated enforcement tools, and anti-copying measures, like digital rights management services. We suggest that the relationship between success, income and copyright is likely to be cyclical: a prerequisite of access to meaningful advice is having enough income to access it (e.g., a copyright lawyer).

Overall, indie authors demonstrated a rudimentary knowledge of copyright, even acknowledging the differences between automatic protection and the capacity for registration in the US as a gateway to additional benefits:



Once you put your pen to paper, it’s copyrighted. Do I believe that is adequate protection? No.

Some also acknowledged jurisdictional differences and awareness of different legal environments, such as the Copyright in the Digital Single Market Directive in the EU, which has worried US-based authors about “running into legal trouble over there”. Nonetheless, most authors are either unwilling, or unsure, of how to engage with this, potentially leading to the underutilisation of rights and routes to further income. Empowering them to make decisions about how to use their work, and how to reuse the works of others lawfully (through copyright education), would be a meaningful intervention.

Resources

ALLi

Global membership association for self-publishing authors.

ALCS

A British Collective Management Organisation (CMO) that works to ensure writers are fairly compensated for any of their works that are copied, broadcast or recorded.

The Author's Interest

An Australian Research Council Future Fellowship project which investigates the relationship between authors, copyright, and their earnings.

CopyrightUser (UK) & (EU)

An online resource aimed at making copyright law accessible to creators, media professionals, entrepreneurs, students and members of the public.

