

重新定义边界

REDEFINITION OF BOUNDARIES

中国音像与数字出版协会常务副理事长兼秘书长
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语言是文字的母体，声音是最早的媒介

LANGUAGE IS THE ORIGIN OF WRITTEN CHARACTERS, AND SOUND
CONSTITUTES HUMANITY' S EARLIEST MEDIUM OF COMMUNICATION.

纸前时代——东西方的书写材料

PRE-PAPER ERA: EASTERN AND WESTERN WRITING MATERIALS

两河流域 Mesopotamia

苏美尔人以及后来的巴比伦人使用黏土制成泥板作为书写和书籍的材料。

The Sumerians and Babylonians used clay tablets as writing and book materials.



古印度文明 Ancient Indus Civilization

印度河流域的印度人将树叶作为刻写材料。

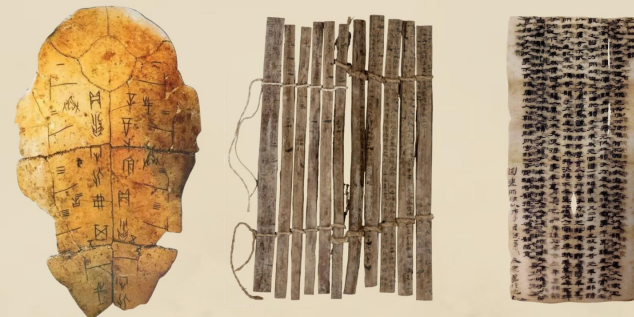
The inhabitants of the Indus Civilization used leaves as a material for inscribing texts.



古代中国 Ancient China

中国人将龟甲、竹片、木片和绢帛用于书籍材料。

The ancient Chinese used tortoise shells, bamboo slips, wooden tablets and silk as writing materials.



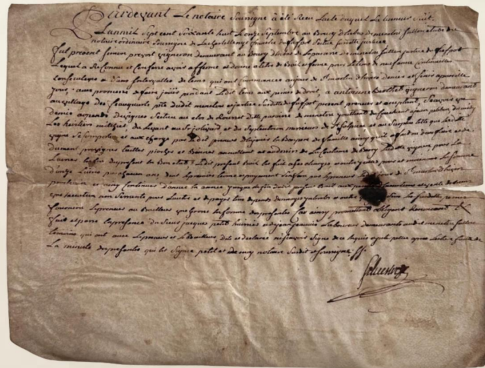
纸的发明——人类进入新文明

THE INVENTION OF PAPER: A NEW CHAPTER IN HUMAN CIVILIZATION

古代中国的四大发明有两项和阅读有关——纸的诞生和活字印刷的出现。纸将人类带入一种新文明，纸是中国贡献给世界的财富。

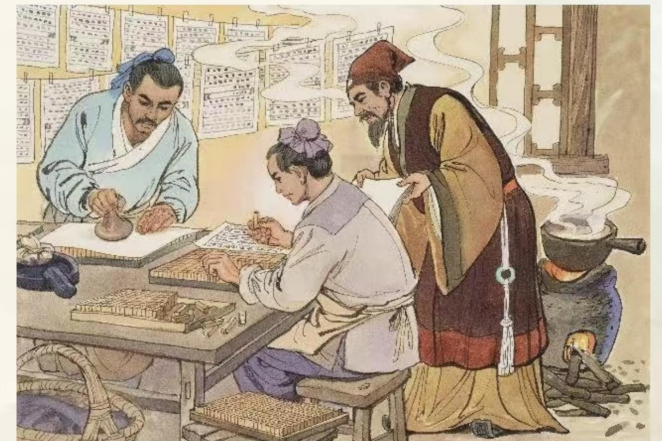
Among ancient China's Four Great Inventions, two are closely associated with reading: the invention of paper and the advent of movable-type printing.

Paper ushered humanity into a new era of civilization and remains one of China's greatest gifts to the world.



与中国不同，西方出现了羊皮纸书，羊皮纸在整个中世纪一直是欧洲书籍的主要材料。

Unlike China, the West developed parchment manuscripts, and parchment remained the primary writing material in Europe throughout the Middle Ages.



时代之变——传统媒介与数字媒介并行

TRANSFORMATION OF ERAS: THE COEXISTENCE OF TRADITIONAL AND DIGITAL MEDIA

·不同的时代，内容的传播方式不同，介质也不同。

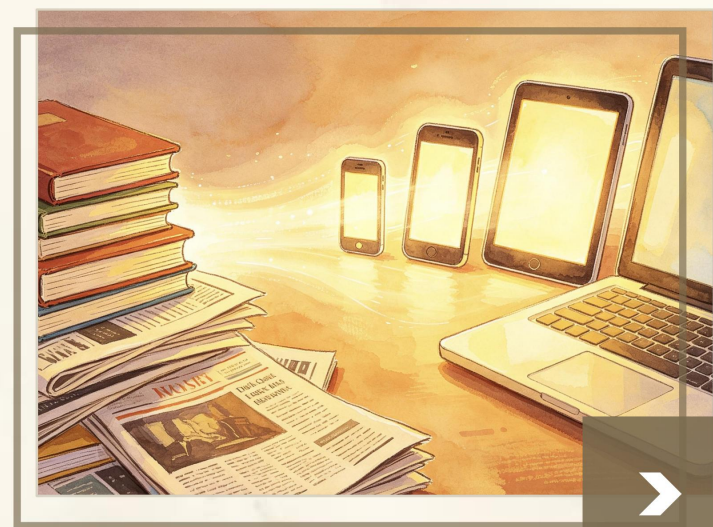
In different eras, content has been disseminated through different media and channels.

·近三十年来，社会变化的一个显著特征是数字技术的深度影响。

One of the prominent features of the past three decades has been the profound impact of digital technology.

·目前我们正处于传统媒介和数字媒介并行的时代。

Today, we live in an age where traditional and digital media coexist.



中国数字出版——定义与规模

CHINA' S DIGITAL PUBLISHING: DEFINITION AND SCALE



中国“数字出版”的定义

Definition of Digital Publishing in China

- 在中国，“数字出版”不仅包括电子书、有声书、内容数据库产品，还包括数字内容产业的许多领域，比如在线音乐、网络文学、网络游戏等等。
- 用数字化方式进行创作，并在网络上进行传播的内容产业。
- In China, digital publishing covers not only e-books, audiobooks and content database products, but also numerous segments of the digital content industry, such as online music, online literature, online games and more.
- It refers to the content industry that creates works in digital form and disseminates them via the internet.



万亿元的市场体量

Trillion-yuan Market Scale

19,000亿

- 数字技术驱动
The driving force of digital technology
- 十亿以上的互联网用户
More than one billion internet users
- 中国的数字出版产业规模远超传统出版行业
The scale of China's digital publishing industry far surpasses that of the traditional publishing industry.
- 2025年行业销售收入突破19000亿元人民币，折合美元约2800亿。
Its revenue topped 1.9 trillion yuan in 2025, around 280 billion US dollars.

用户变迁

USER EVOLUTION

代际差异

Intergenerational Differences

- “数字化移民”与“数字化原住民”
Digital Immigrants vs. Digital Natives
- 手机是“数字化原住民”生活中与生俱来的一部分
Mobile phones are an innate part of life for Digital Natives.

行为方式的重塑

Reshaping of Behavioral Patterns

- 大部分用户在用“屏”阅读，用“屏”时间长于用纸
Most users read on screens and spend more time reading digitally than on paper.

从内容消费者到内容生产者

From Content Consumers to Content Producers

- 由于移动互联网的介入，内容的生产和消费两端互相融合。
Driven by the prevalence of mobile internet, content production and consumption have gradually converged.

市场格局与出版业的基石价值

MARKET LANDSCAPE AND THE FUNDAMENTAL VALUE OF PUBLISHING INDUSTRY



市场现状

Current Market Situation

网络文学、数字音乐、有声读物等数字内容市场规模早已实现对传统书报刊的超越。

Digital content sectors such as online literature, digital music and audiobooks have already outperformed traditional books, newspapers and periodicals in market scale.



基石价值

Fundamental Value

出版业提供了专业、权威、严谨的内容。
The publishing industry delivers professional, authoritative and rigorous content.



未来趋势

Future Trends

新技术将打破传统图书、音乐、视频的场景边界，融合知识深度、网络交互性与IP渗透性。内容消费将从单一形式转向多元共生，塑造出全新的内容生态。

New technologies will break down the scenario boundaries of traditional books, music and videos, integrating in-depth knowledge, online interactivity and IP penetration. Content consumption will shift from a single format to diversified coexistence, forming a brand-new content ecosystem.

重新定义出版

REDEFINITION OF PUBLISHING

内容多元转化

Diversified Transformation of Content

出版社不再只做纸质图书，同步开发有声书、有声剧、短视频、文创、玩具等产品，以多元形式传递知识信息。

Publishing houses no longer focus solely on printed books. Instead, they simultaneously develop products including audiobooks, audio dramas, short videos, cultural and creative merchandise, and toys to disseminate knowledge and information in diversified forms.



长江出版社 《红楼梦十二金钗立体美人图》
Changjiang Press
A Dream of Red Mansions: 3D Portraits of the Twelve Beauties



卡游×新华出版社
《黑神话：悟空 | 遇见山西》图书配套文创礼盒
KAYOU × Xinhua Publishing House
Black Myth: Wukong | Encounter Shanxi Book & Merchandise Gift Box

重新定义出版

REDEFINITION OF PUBLISHING

IP全域开发运营

Full-domain Development and Operation of IP

优质内容具备长效IP价值，可延伸打造舞台剧、游戏、线下展览、文旅项目。
High-quality content carries long-term IP value and can be extended to develop stage plays, video games, offline exhibitions and cultural tourism projects.

线上数字化加工

Online Digital Processing

将书籍拆解为碎片化知识颗粒，构建语义关联，支持智能检索、个性化重组，衍生课程、数据库。

Books are decomposed into fragmented knowledge particles to construct semantic correlations, enabling intelligent retrieval and personalized reorganization, as well as derivative products such as courses and databases.



《黑神话：悟空》
Black Myth: Wukong



《北京法源寺》同名话剧
BEIJING FAYUAN SI
(Stage Play of the Same Name)

国际视野：合作共赢

GLOBAL VISION: WIN-WIN COOPERATION

我们始终对版权业务的国际合作持积极支持的态度，希望这样的合作能够促进双方的业务发展。
We fully support international copyright cooperation to advance mutual business growth.



经典合作 Classic Cooperation Case

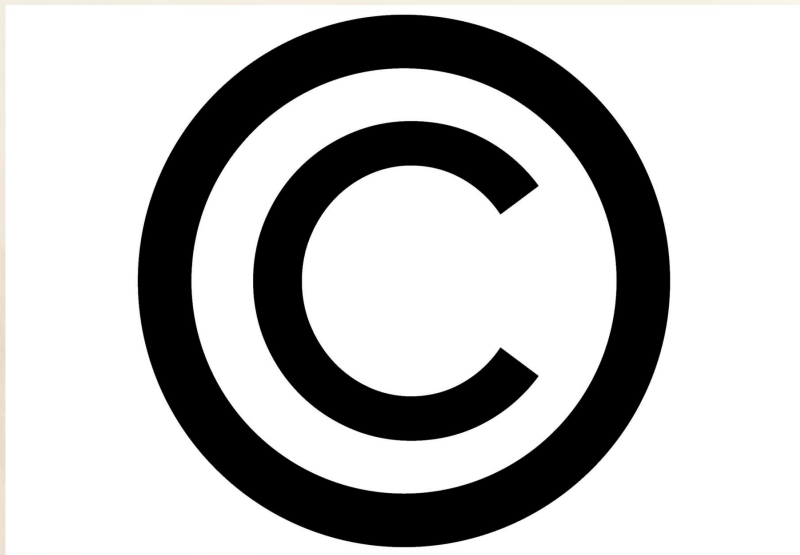
童趣出版有限公司是中国首家中外合资出版企业，由丹麦艾阁萌集团和人民邮电出版社共同组建，三十年来深耕少儿出版领域，成为中外文化合作的典范。

Children's Fun Publishing Co., Ltd. is China's first Sino-foreign joint venture publishing house. Co-founded by Denmark's Egmont Group and Posts & Telecom Press, it has focused on children's publishing for more than 30 years and become a model for Sino-foreign cultural cooperation.

童趣出版有限公司
Children's Fun Publishing Co., Ltd

立身之本：版权保护与合规经营

FUNDAMENTAL PRINCIPLE: COPYRIGHT PROTECTION AND COMPLIANT MANAGEMENT



内容产业的基石是对版权的保护

Copyright protection serves as the cornerstone
of the content industry

尊重法律

Respect the Law

尊重文化

Respect Culture

保护版权

Protect Copyright

谢 谢 大 家
THANK YOU