

Overview of the global bookselling market in 2020

Analysing the impacts of the Coronavirus pandemic on the bookselling industry

May 2021





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Introduction

Behind us is an unprecedented year that completely turned our lives around, from stopping our social gatherings and closing many businesses for weeks on end, to facilitating a big swing to digital services. The book industry as a whole faced a substantial impact: cancelled trade fairs, seized supply chains, and frozen rights sales. Booksellers, as many of their retail counterparts, were forced to shut their doors – resulting in drastically reduced sales numbers.

To analyse the global bookselling trends in 2020 and start understanding the wide-ranging impacts of the Coronavirus pandemic on the industry, the European and International Booksellers Federation (EIBF) carried out a survey among its members and partners in March 2021. The national booksellers associations for seventeen countries responded to our written questionnaire, shedding light on challenges booksellers faced since the outbreak of the pandemic in early 2020.

As a non-profit European and international umbrella organisation, EIBF represents national booksellers associations and booksellers around the world. Through its member associations, EIBF speaks on behalf of more than 25.000 individual booksellers. Thus, we are ideally positioned to provide in-depth insights into the status of the bookselling sector as it responds to the effects of the pandemic.

This report collates insights into the bookselling industry of 2020, analysing the impacts of national policy responses to the pandemic, exploring the total sales numbers for the past year, and highlighting public and private initiatives launched to help the sector sustainably develop going forward. In addition to the survey answers, this report includes supporting information gathered by EIBF during the course of the past year.

Having a broad oversight and understanding of the current situation is critical for sustainable development, especially as we enter another pandemic year. We hope this report provides that basis.

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Providing meeting
spaces



Improving reading
outcomes



Local bookshops
help with...

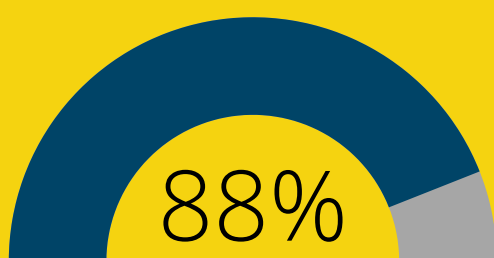


Investing in local
communities



Ensuring access
to literature

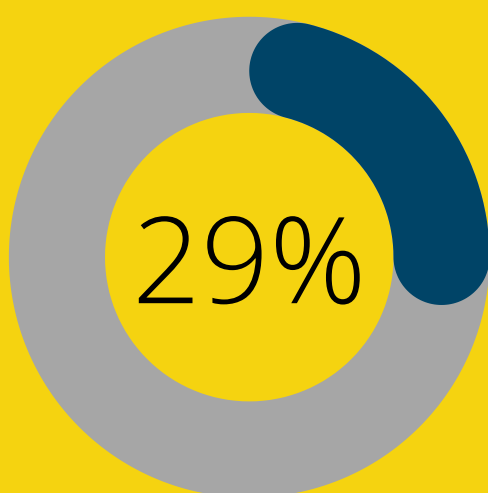
Evaluating the impacts of the pandemic on the global bookselling market



In majority of queried countries bookshops had to close at least once during lockdown



In all queried countries governments provided subsidies for improving economic outlooks



In a third of all queried countries governments provided subsidies dedicated for bookshops

+6% or more
26.7%

1 to 5%
13.3%

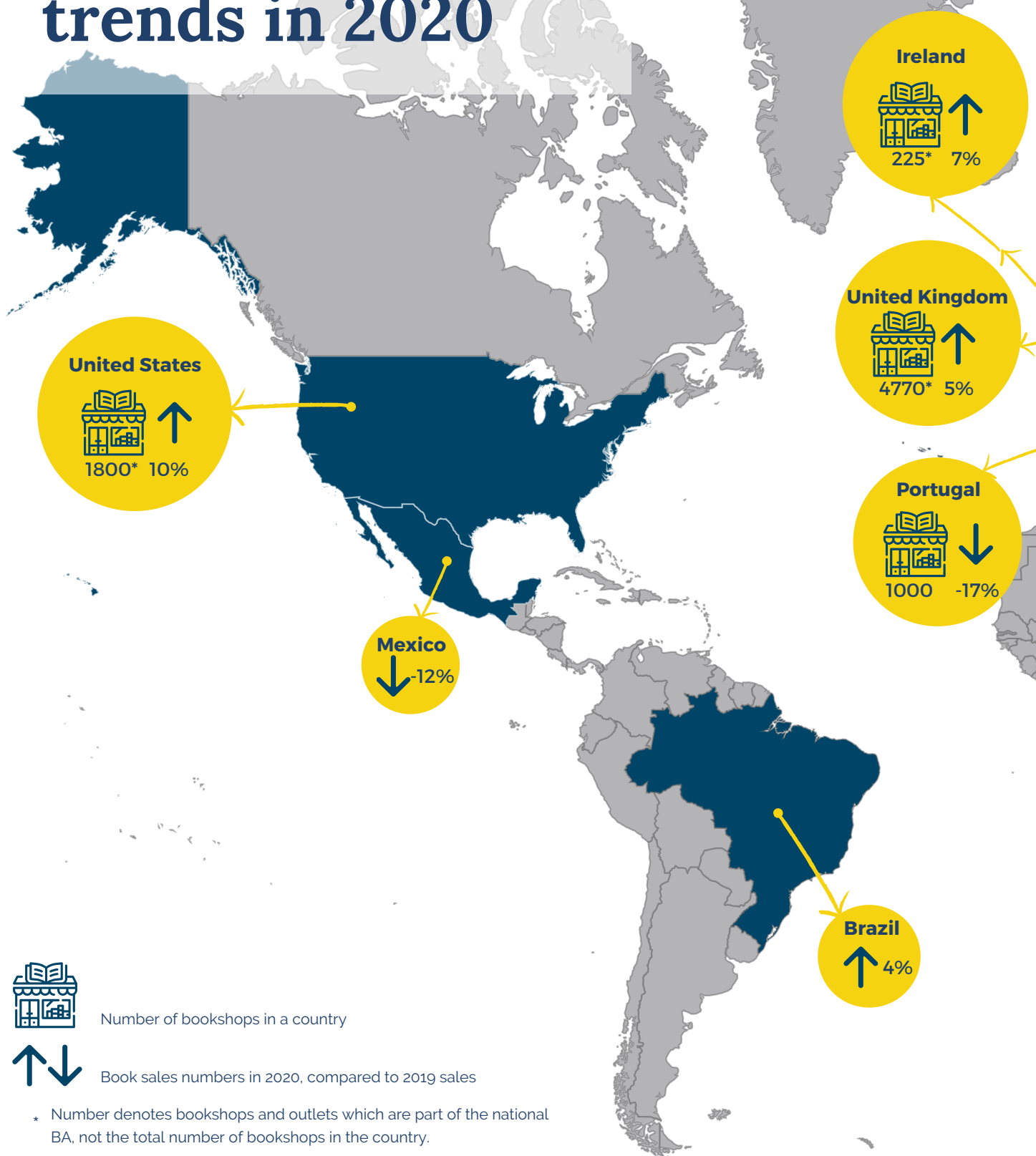
0 to -5%
13.3%

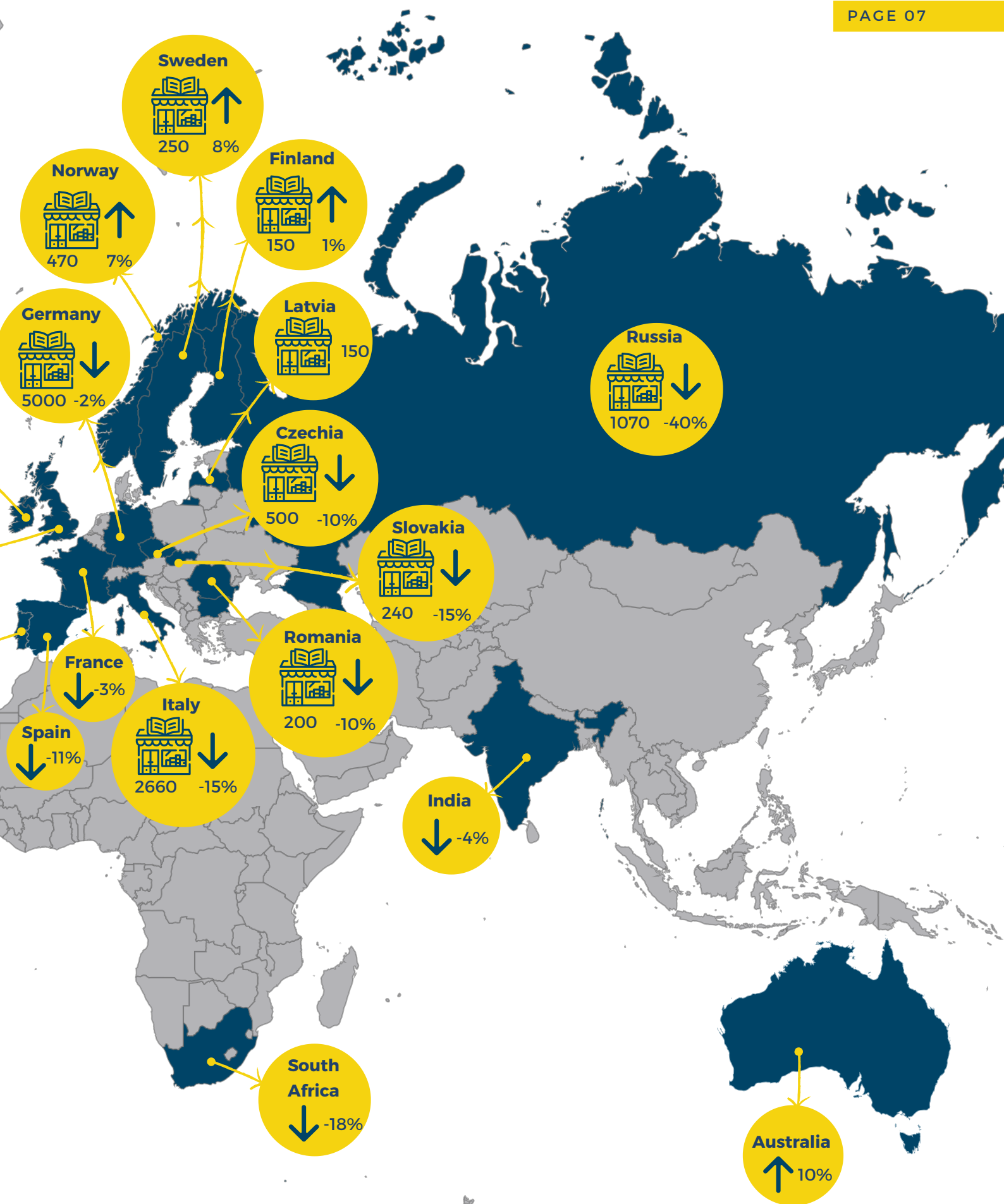
-10% or more
46.7%

In over half of queried countries total book sales numbers for 2020 decreased compared to 2019 (in %)

Participating countries in EIBF global bookselling trends 2020 survey include: Bulgaria, Czech Republic, Finland, France, Germany, Ireland, Italy, Latvia, Norway, Portugal, Romania, Russia, Slovakia, Spain, Sweden, United Kingdom and United States.

Global overview of the bookselling trends in 2020







Analysing the impacts of the pandemic on the bookselling industry

Not all growth is equitable

While the bookselling sector has been hit hard during the pandemic, some national markets saw growth in books sales in the past year. However, it is important to distinguish the value of total sales numbers across all channels and the value of book sales numbers in brick and mortar bookshops. The exact breakdown is often hard to come by, but our members have seen knock-off effects of this.

Swedish Booksellers Association: "While we have seen the overall market growing by 8.7% in 2020, this mainly benefitted digital channels and platforms. Book sales in the physical bookstore channel declined by 19% in that same period, despite bookshops being open this whole year."

American Booksellers Association: "According to the Association of American Publishers, total trade sales in 2020 rose 9.7%, to \$8.6 billion. Total net book sales in 2020 rose 0.1% to \$14.75 billion over 2019. This data represents the sales of 1,354 publishers and distribution clients, as reported to the Association of American Publishers. It is all channels, not just independent bookstores. On the other hand, the U.S. independent bookstores were hit hard by the pandemic. In 2020, 78 of ABA's member bookstores closed, and, although the holiday season was robust and stores saw a last-minute rally for the year thanks to support from customers, there is still significant uncertainty. Many stores are operating in the red and working to keep their staff safe. 5% of stores say they're in danger of closing and an additional 11% are uncertain about the future."

Bulgarian Book Association: "We conducted a survey in the beginning of 2021 among our members to analyse the status of the book market in the country. Among others, we inquired about sales numbers. Only a quarter of all the respondents have seen an increase in sales in 2020. The rest have lower sales numbers, with a third suffering losses. At the same time, almost two thirds of respondents are noting a big increase in online sales, competed to physical sales in bookshops."

Bookshop location matters

Many retail restrictions focused on areas where large numbers of people could congregate together. Even in regions or cities where shops were allowed to (re-)open, many shopping malls remained closed for longer time. At the same time, shops located in city centres or in business areas, faced reduced customer flows, as people stayed at home. This resulted in shops located in these areas to more strongly experience the impact of the pandemic.

German Publishers and Booksellers Association: "During the first lockdown, bookshops everywhere in Germany were closed. Later on, regional rules applied and some bookshops were open, some could do click & meet services, while others could only offer click & collect or delivery options. Closures have had a very marked impact on turnover. The sales generated by bookshops during lockdown have come at a cost of being much less profitable (delivery costs, individual ordering, hygiene measures, etc.). Chains with stores in inner-city areas, malls and stations/airports have been hit hardest. On the other hand, some local bookshops say they have hardly felt an impact, so it varies a lot."

Bulgarian Book Association: "In Bulgaria, a lot of the bookstores are located in the shopping centers and malls. During the lockdowns, malls were the first to be closed, so all the bookstores in malls closed too. Many booksellers see the overall lockdown, and especially the closing of malls and big shopping areas, as one of the main factors for the negative impact their businesses saw during the pandemic."



Change in customer behaviour

The outbreak of the pandemic prompted many different policy responses, with countries imposing movement restrictions, which left businesses that rely on physical presence of customers in a precarious position. To ensure they could survive this drastic and unexpected change in their daily activities, booksellers had to shift their business model and encourage their customers to start buying books online. At the same time, many booksellers didn't have the same presence, or even any presence, on digital channels as they did in their shops.

Association of Czech Booksellers and Publishers: "Overall the total interannual decrease of sales in bookselling industry amounts to approx. 10%. However, small bookshops without an online shop, as well as bookshop chains operating their shops in shopping malls, experienced a decrease amounting to approx. 30%. The logical outcome of the crisis, therefore, was a substantive change in the structure of the book sales in favour of online shops."



Decrease in sales even without the lockdown

A few countries and regions around the world went through the first year of pandemic without their governments imposing substantial restrictions. However, even those areas experienced the tail-end effects of the change in daily lives of their residents – staying at home more, thus spending less time outside and decreasing visits to retail shops.

Finnish Booksellers Association: "Despite bookshops being able to keep the shops open, we noticed substantially decreased customer flow. However, one positive note is that when customers do come to bookshops, they buy more than before – not just books, but also puzzles, games, etc."

Type of national aid schemes launched to help booksellers

As we have seen earlier in this report, one third of the queried countries' national governments provided subsidies and support dedicated to the book sector and even bookshops specifically. Many of these focused on wider issues booksellers face, which were highlighted during the pandemic: improving their presence on digital channels, covering shipping costs for small retailers, and so on.

German Publishers and Booksellers Association: "Neustart Kultur is a programme at federal level that dedicated €10 million to bookshops for projects aimed at improving or establishing web shops and/or social media and other digital activities, including training. Only bookshops with a turnover of less than €10 million per year are eligible. Applicants can receive between €1,500 and €7,500 based on their project pitch."

EIBF records: "The French Government announced in November that it would reimburse the cost of shipping for independent booksellers who were forced to close their stores due to national lockdown in autumn. The Irish government supported a similar scheme during the country's first lockdown."

French Independent Booksellers Association: "The Centre National du Livre – CNL (National Book Centre) implemented an initial €5 million emergency plan for the book industry in April 2020. The Association pour le développement de la librairie de création – ADELIC (Association for the Development of the Creative Bookstore) committed to supporting bookstores with further €5 million. In addition, the CNL launched a support programme for the 'modernization of bookshops'. Support will be granted upon application and can go up to €150,000. It will cover renovation works, as well as acquisition of furniture, materials and IT equipment."

Supporting bookshops on private and/or individual level

American Booksellers Association (ABA): "While there has been federal aid for small businesses in the U.S., nothing was directed specifically at bookstores. In the private sector, ABA helped lead an industry-wide campaign #SaveIndieBookstores to support all bookstores nationwide, which launched in April 2020 with a donation from bestselling author James Patterson of \$500,000. Patterson partnered with the Book Industry Charitable Foundation and ABA to promote the campaign, and he and other prominent authors contributed to the campaign and called upon writers, readers, and book-lovers to contribute to #SaveIndieBookstores. At its close on May 5, 2020, the #SaveIndieBookstores campaign had raised a total of \$1,239,595 to support independent booksellers across the country with immediate funding to offset business loss due to the COVID-19 crisis. More than 1,800 donors contributed to the cause."

Positioning bookshops as essential

With life slowing down throughout the world, people turned to reading in search of some comfort. Many booksellers came up with innovative actions to support local communities during these difficult times, from launching curb-side pickup or starting city-wide deliveries to hosting digital author events, book clubs and children reading hours.

Once allowed to re-open shops, and despite the numerous strict government regulations they had to comply with, many booksellers were happy to be able to welcome customers again inside their stores. The rush that followed the re-openings highlighted once more the essential character of bookshops and how they best fulfil this role while staying open.

Calls to national governments for considering bookshops as essential – thus allowing them to stay open in case of lockdowns – started with the first retail closures in March. The situation nominally improved throughout the year, with a few countries recognising bookshops as essential through the adoption of new decrees. If this newly gained status represented a victory for a few, it still remains the fight of many.

Although EIBF has been highlighting the essential character of bookshops within their communities for many years, 2020 has proven how true that is.

We would like to thank our members for their input into this report.
All images are courtesy of [canva.com](https://www.canva.com).



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