CONSEQUENCES OF THE COVID-19 CRISIS ON THE BOOK MARKET

FEDERATION OF EUROPEAN PUBLISHERS
FÉDÉRATION DES ÉDITEURS EUROPÉENS

FEDERATION OF EUROPEAN PUBLISHERS

FOREWORD BY MARIYA GABRIEL, COMMISSIONER FOR INNOVATION, RESEARCH, CULTURE, EDUCATION AND YOUTH

For the book sector, as for many others, the Covid-19 crisis is unprecedented. Never before a crisis has affected to such an extent, in nearly all European countries and at the same time, not only the whole value chain from authors to bookshops but also its clients, the readers. The creation, production, distribution, promotion and sales of books were almost at a standstill for weeks whereas readers were confined at home with more time to read but less access to books.

It is very difficult to describe the consequences and measure the impact of such a crisis at European level. How has each element of the publishing chain reacted? What were the short-term consequences on publication calendars or sales? More importantly, what will be the longer-term impact on the financial health of companies and organisations? What new business models could emerge? How have consumers adapted their behaviour?

To answer all these questions, we need data. This report by the Federation of European Publishers, is a first attempt to provide an account of this historical crisis and its consequences for European publishers. It contains findings that, together with other documents produced by their partners such as the European Writers' Council or the European and International Booksellers Federation, will help decision-makers – including the European Commission and EU Member States - define an appropriate response.

I believe it is essential to preserve and strengthen the financial health, competitiveness and diversity of the thousands of organisations that have made the European book sector one of the largest cultural industries in the world in terms of economic value and employment. Beyond its economic dimension, it is also important that all Europeans have easy access to the diversity and creativity of European books.

This report will help us to discover the avenues to make this a reality again.

I appreciate the work by the Federation of European Publishers in delivering such a valuable report, which will help us define future support measures.

Mariya Gabriel
Commissioner for Innovation, Research, Culture, Education & Youth

FOREWORD BY RUDY VANSCHOONBEEK, FEP PRESIDENT

End of February, before the COVID-19 crisis concretised in Europe, publishers were carefully, as always, but optimistically watching sales, preparing to sell rights at book fairs, organising book launches. Then everything froze, first in Italy, then in Spain and few days later the whole of Europe, or almost, went into lockdown.

Alerted by its members on the immediate impact of closing bookshops on the sales of books, FEP decided to share information on a daily basis on what was happening around Europe, in terms of bookshops closures, impact on sales of books, measures to support the book chain. We published 70 dailies, collecting information from member associations and a colleague in Malta. This information allowed us to recommend measures to assist the book world which we shared with the European Commission, Parliament and Council.

We also worked with the European and International Booksellers Federation to highlight ten common measures and more specifically vouchers for citizens to buy books in local bookshops and massive public purchases of books for libraries and educational establishments through local bookshops.

Additionally, I want to draw your attention on the survey of the European Writers' Council on "The Economic Impact of COVID-19 on Writers and Translators in the European Book Sector" and its recommendations for a sustainable future on EU and national level.

European book publishers will be engaging in a dialogue with their fellow authors and booksellers to cooperate in overcoming this crisis.

The crisis is not behind us, by far, but with the Summer holidays and bookshops having reopened all over the continent, it was time to look at the effects of the Covid-19 crisis on the European book market. This is an interim stock-taking exercise which we expect to renew at the end of the year. We hope that in the meanwhile trade will have picked up and that we will be bearers of better news.

I wish on behalf of all the FEP members to thank Commissioner Mariya Gabriel for her support and for her opening words. Together united. L'union fait la force.

Rudy Vanschoonbeek
President

Introduction

The book sector, like all cultural and creative sectors, has been hit hard by the crisis related to the COVID-19 pandemic and the measures put in place to contain its spreading. The immediate and most visible effect of the situation has been the closure of bookshops in many EU Member States for several weeks or months; this was, however, only part of the wider range of consequences on the book value chain. This document presents and tries to analyse how book publishing has been affected by the crisis, on the basis of information mostly submitted by the members of the Federation of European Publishers (FEP) all along the months of the emergency. All figures provided – unless otherwise specified – refer to comparisons with the same or equivalent period in 2019.

FEP's analysis reflects mainly the consequences of the crisis on publishers; the situation, however, has greatly affected authors and booksellers as well. The European Writers' Council has published a detailed recount of the impact on authors, and FEP has worked in close coordination with the European and International Booksellers Federation to propose a series of measures to tackle the consequences of the crisis on the publishing and retail side of the value chain.

Lockdown: the day(s) when bookshops closed…

…and sales dropped dramatically

When the pandemic reached Europe, many countries imposed lockdown measures, often including the closure of so-called all non-essential shops and activities. This meant that bookshops had to close in a number of countries across the EU, among which the four biggest book markets: Germany, France, Italy and Spain – as well as the UK. Bookshops had to close basically everywhere, from Belgium to Greece, from Portugal to Bulgaria, from Austria to Ireland, from Poland to Romania, from Hungary to Lithuania.

The impact on sales was immediate and dramatic. Brick and mortar bookstores are everywhere the main channel for book sales, and the one most used by readers (in Italy, for example, they generate 66% of sales and are used by 74% of readers). The chilling effect on demand was unmistakable: sales in bookstores dropped anywhere between 75% and 95% in most countries where a lockdown was in place. Just to name a few: retail sales in Austria in the second half of March were down 74%, they were down 50% in Belgium for the whole month; in France, level 1 bookshops (larger stores and culture superstores) also had a reduction of sales of more than 50% for the whole of March, and in Germany bookstores lost more than 30% of sales; by the end of March, for the lockdown period, booksellers' sales in Italy had shrunk 75%, with a loss of 20 million **€;** around the same time, sales were down 78% in Portugal, 80% in Spain and 85% in Romania. It is important to bear in mind that lockdowns were out in place in most cases around mid-March, so figures for the whole month include two weeks of regular activity, though often already reduced.

If anyone was doubting it, the importance of the bookshop sales channel became clear in the impact the closures had on the overall publishers' turnover. Overall sales were down 66% in France between mid-March and mid-April, and one of the largest publishing groups recorded a -90% in sales in early April. In Italy, close to one third of publishers estimated a loss of more than 70% of their turnover for March. The whole value chain expected losses of 500 million **€** per month in Germany, and 200 million per month in Spain. The loss of the main channel, plus the restrictions to movement and activities, meant for many publishers a massive reduction in the level of work, and in numerous cases a total cessation.

*source: FEP members

…and new publications and cultural diversity were affected, too

This meant the postponement or cancellation of many planned new titles – which in turn further affected revenues. Once again, a few examples: by mid-May, Bulgarian publishers expected to publish 500 to 1,000 fewer titles than planned in 2020, i.e. a drop of 10-20%, and 87% of them postponed all titles during the lockdown; in the second half of March alone, French publishers postponed publication of 5,236 new titles and new editions, and by mid-May they planned to postpone on average 18% of titles scheduled for 2020 altogether; title production dropped 75% by end March in Greece, and the estimate for the whole year is a reduction of around one fifth of the total; Czech publishers postponed some 15% of their titles so far. Most strikingly, in Italy by the end of March some 23,200 titles had been cancelled or postponed (about one third for the yearly production), corresponding to 48.9 million fewer copies printed, and during the whole lockdown period title production was down two thirds. Virtually all countries experienced some kind of disruption in publication plans.

Moreover, this came against a background of costs already sustained and not recoverable: rights acquisitions, translations, promotion, logistics and so on. In addition, some publishers were affected by disruption of supply chains and by a decrease in exports. By end March, almost two thirds of publishers in Italy were using or planning to use the redundancy fund for temporary/partial unemployment; at the beginning of April, many publishers (and booksellers) in France risked foreclosure if not given support. Publishers everywhere soon were faced with liquidity problems.

An additional downside of the situation was the impossibility to organise public events, which meant that book fairs could no longer take place – nor public readings, festivals and other events that are key for authors' revenues and sales of books. Starting in March, many book fairs (as well as other events, from book festivals down to readings in bookshops) had to be cancelled, postponed, or moved online. This negatively affects authors, publishers and booksellers; book fairs, for example, are occasions to exchange rights, showcase new titles, and in some cases to generate high volumes of sales to the public. Fairs affected so far include Paris, London, Bologna, Prague, Antwerp, Tallinn, Thessaloniki, Budapest, Turin, Gothenburg, Lisbon, Rome and a few more. The Frankfurt Book Fair, the largest in the world, is still planned for October, but will be largely downsized. There is uncertainty for other events scheduled for the autumn.

*source: FEP members

The crisis hits full on

When April came, the book sector had virtually ground to a halt in many countries, and as lockdowns continued, the impact was felt at full force. Sales in level 1 bookshops in France were down 96%, 89% for level 2 bookshops (smaller local bookstores). Retail bookselling lost 47% in value in Germany, while in Italy, by mid-month, sales in bookstores were down 85% on average since the beginning of the lockdown. In Spain and Slovenia, sales were down up to 90%. By early May, booksellers in the UK were making on average 18% of their normal sales, and publishers experienced a reduction of 60% in turnover (90% for the small ones relying mostly on bookshop sales). French-speaking booksellers in Belgium lost 95% of turnover.

Booksellers on skateboards and online…

The booksellers that managed to keep selling books throughout the lockdown did so by strengthening their presence online, but also by finding creative ways to still reach their customers – delivery, pick up at the shop's door, and so on. And this was not even possible at the worst of the crisis, for example in countries like Italy and France; eventually, however, some level of activity was achieved also in these countries. In Italy, booksellers which managed to maintain customer loyalty and build an online presence and a delivery strategy contained losses during the lockdown at 71% of turnover on average, against the 85% lost by the sector overall.

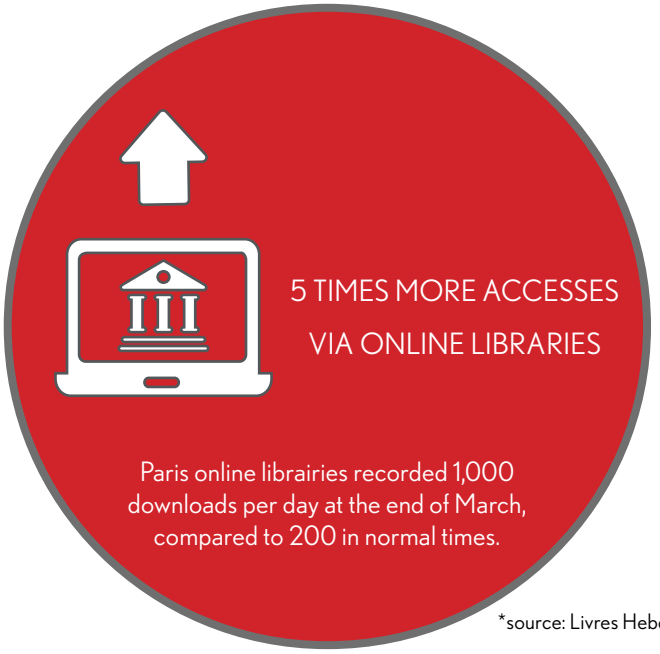
Some bookshops, which sold also press products, were able to remain open in countries where pure bookstores had to close, whereas kiosks could stay open. This also helped maintain a minimum of activity in book sales, as did sales in supermarkets and hypermarkets, which were affected consistently less negatively than those in bookshops– and in some areas actually recorded increases, for example in Flanders and Germany at the beginning of the lockdown. If the market did not lose even more in Portugal, it is thanks to the fact that supermarkets normally represent some 30% of sales.

…but online sales up do not match in-store losses

Of course, online sales also increased sharply in many countries: they were up 52% in March and 180% in April in Flanders; many online platforms doubled or tripled their sales in France in early April; in the year up to mid-April, online sales in Italy for the first time ever overtook sales in stores, reaching a 47% share, and by June they had become 40% of total book sales in Romania. In the UK, in April, WH Smith's in-store sales dropped 85%, whereas online sales went up 400%. Ebook and audiobook sales also increased significantly in many countries, and in some places, publishers chose to release certain titles only in digital.

However, in none of the countries where bookstores had to close did online or digital sales compensate for the loss of sales in shops – as mentioned earlier, most sales normally take place via physical bookshops. Even cultural superstores, which usually have a well-established online presence, managed in most cases to contain the losses, but not to improve their sales – in France, for example, their turnover was down 30% in March and 50% in April.

And library e-loans surge



*source: Livres Hebdo

It was not just bookshops that were closed; so were libraries. In order to address the increasing reading needs of their patrons, publishers' licences were made more flexible during the crisis, like in France, where several publishers provided libraries with improved licensing conditions. In the UK, libraries saw a 200% surge in ebook library loans, with publishers offering adapted licensing facilities and aggregators making more titles available. Libraries in Paris at the end of March were recording a fivefold increase in ebook downloads through their e-lending schemes.

Libraries are powerful allies of the book chain to promote reading through the whole European society. However, the right balance in terms of access must be found: as a behavioural study in Germany has shown, when readers can easily borrow all published ebooks through libraries, they are much less likely to continue buying these in bookshops. With the share of sales of trade publishers to public libraries being at best 4 % of their turnover, it is crucial to maintain an equilibrium between e-sales and e-loans.

Where bookshops did not close

In some countries, bookstores were not forced to close. The health crisis still had an impact on the book market there, too, as safety measures of some kind or other and the understandable reluctance of many people to go into shops took their toll on sales. Physical sales were down 30% in Denmark in March and April, with publishers having postponed by the end of June almost one quarter of new publications, and by the end of April, one of the largest bookstore chains had gone bankrupt. In Estonia, sales were also down 30% during the worst of the crisis – from March to May – and title production was down 35%. In the same period, sales in bookstores were down 40% in Finland, with individual stores ranging from -20% to -90%. In Latvia, where bookstores were closed on weekends, in April and May sales were down 42.3%, and 45% fewer titles were published. In Norway, by mid-April, physical sales from publishers to bookstores were down 59%, and 80% of publishers were postponing or cancelling new titles; sales were down 29% overall in April. In Sweden, between mid-March and mid-April, sales in physical bookstores were down 36.3%. In the Netherlands, most bookshops remained open or reopened shortly after the crisis outbreak; however, physical sales were affected, too, being 30% down in the first two months of the emergency.

In all these countries, too, online sales experienced sharp growth, as did digital sales – and there was a massive shift in lending in libraries, from physical to digital. In the Netherlands, online sales were up 30% from the beginning of the crisis until the end of April, when they overtook offline sales for the first time. Around the same period, ebook sales were up one third in Norway. However, reports consistently pointed out that the spike in online and digital sales was not enough to compensate for the loss of physical sales – in some cases, it went nowhere near. In fact, also in these countries, publishers experienced repercussions: already in March many publishers in Iceland were recurring to partial unemployment support, and by May also in the Netherlands many were getting government support for salaries; around mid-April, 80% of publishers in Norway were reducing or stopping their activity, and half of them had laid off staff.

Bookshops reopen: taking stock

The damage done

Between April and May, bookshops were allowed to reopen almost everywhere – in UK and Ireland they had to wait for June. By then, a huge damage had been done. In Austria, turnover from January to May was down 12.7%; publishers' sales had lost 15% in the Czech Republic; book sales were down 22.1 % in France, 11.9% in Germany (17.5% in brick and mortar bookstores) – where turnover during lockdown shrunk 50% (70% in brick and mortar bookstores); bookstore sales had lost 38% in Spain. Publishers' turnover during lockdown was down 40% in Hungary; sales of books in Ireland were 30% down, but 70% for Irish-published books. In Italy, trade book sales were 135 million short between January and the beginning of May. Publishers in Luxembourg had lost up to 90% of sales between April and May. By end May, Romanian publishers' turnover had shrunk 60% since lockdown. All in all, sales in the UK were down 11 % in volume in the second quarter of 2020.

Sales picked up somehow when bookstores reopened, but in most cases restrictions in place and people's caution meant that they remained lower than pre-crisis levels, except maybe for the first week. In some cases, there were spikes in sales, though not sustained. So, for example, turnover in Austria in May was down 5%, and sales were down 20% in France, and 2.2% in Germany (-6% in retail bookselling); turnover in bookstores was down between 10 and 50% in Hungary. The first week of deconfinement, sales more than doubled in value in France in comparison with the previous week, and were also 2.7% higher than the year before; however, they dropped 8% the following week, being also 11% lower than the year before. The first week of full reopening, sales were up 0.5% in Germany through all channels – but still at -6.8% in brick and mortar bookstores. The first week of June, bookshop sales were up 37.5% in Spain compared to the previous week, but still 5.2% lower than in 2019. The week bookshops reopened in the UK, sales were up 30.4% year on year in value, and 9.3% the following week – a 14.1% value drop-off week on week. By the end of June, this slow recovery process had brough sales in Germany at -8.3% compared to the previous year (-13.9% in brick and mortar bookstores).

In countries where bookshops did not close – or not completely – the situation remained difficult, especially for brick and mortar bookstores. The total market was down 5% in May in Norway, and 4.6% in Sweden – but bookstores were down 35.4%. In Latvia, a large bookstore chain reported sales down 15% by value in the year up to mid-June.

All over Europe, publishers have been cooperating with booksellers upon their reopening – and already during the lockdown in many cases – to manage the consequences of the most difficult times and to support the resuming of activities.

The "lucky" ones

Still, in a few of these countries the value chain managed to limit the damage quite significantly, or even to maintain a positive result overall, thanks to the shift in sales. In Finland, growth in online sales, and in particular ebooks and audiobooks, ended up more or less offsetting the losses in physical sales. In Sweden, by early June, it appeared that the market, including the ever-growing subscription services for audiobooks, had been at the level of the previous year altogether. And in the Netherlands, the market for trade books between mid-March and mid-June was down just 1%, with online sales up 33% and offline sales down 24%; Dutch books were up 1%. Altogether, sales until mid-June for trade books were up 2% by value, and 4% for Dutch books; online sales were up 20%, and offline sales were down 11%.

But there as well, bookshops clearly took a big hit, and this may affect them in the mid- to long term. These average figures, in fact, hide the underlying differences: as said before, physical bookstores suffered a lot everywhere, and so did many small publishers, niche ones often, those which rely the most on bookshop sales. Moreover, the postponement of titles has come to the detriment of cultural diversity and the income of many authors. It is also worth mentioning that the widespread losses are even more significant since in many cases they reversed a positive trend in book markets that had started in 2019 and was being confirmed in the first months of 2020.

Prospects for the mid-term: uncertainty reigns

It is difficult as yet to make forecasts on the global impact of the crisis for the year 2020, but it is clear that it has damaged the sector severely, introducing an element of great fragility in an industry that was characterised by a healthy but delicate balance. On one hand, there is the negative impact on sales and revenues that has already materialised, often very strongly. On the other, there are the dynamic effects of the increased fragility and of other circumstances related to the crisis, that might spell further trouble for the sector, including in countries so far left relatively unscathed. Estimates of the possible impact on the sector for the whole of 2020 have been attempted in a few countries; the earliest estimates, made in March and April, give an idea of the gravity of the situation when the pandemic hit many European countries full on. In Slovenia, a decline of 30-45% was expected on a yearly basis; in Flanders, a majority of general publishers expected a turnover loss for 2020 of 21-35%, and 30% estimated they would lose more than 50%; in Spain as well, initial estimates pointed at potential losses of 50% of the yearly turnover in the home market, plus 70% of exports. In early May 66% of French retailers anticipated a loss of turnover of 20 to 40% over 2020, 33% of level 2 bookshops and department stores anticipated a drop of more than 40%, and over 50% of level 1 bookshops expected a 20-40% fall.

With the easing of restrictions and the relative improving of the situation, expectations have become less gloomy, but the outlook remains worrying: according to market surveys, the annual trend for sales in France is -7% by value, -10% for level 1 bookshops, but a recent government study estimates the loss for the year rather at 23% for publishes and 24% for booksellers; in Greece, annual sales are estimated to shrink by between 10 and 30%; in Slovakia, brick and mortar bookstores' turnover is deemed to take a 15% drop. In Denmark, 58.6% of publishers estimate turnover for 2020 to be lower than expected; 69% of those expect a decrease of 0-20%, 27.6% a decrease of 21-40% and 3.4% a decrease of 41-60%. In Italy, a country hit particularly hard, the entire book industry could lose between 650 and 900 million for 2020, i.e. 20 to 30% of the total market for the year.
Several elements of fragility have been introduced or aggravated by the crisis: in all countries, alongside authors, bookshops have suffered the most, and for many of them the future remains uncertain. At the same time, the emergency confirmed the importance of brick and mortar bookshop sales for the sector, and its reliance on a healthy and diverse network of retailers. The crisis has also in most cases taken a bigger toll on small publishers, which tend to be more vulnerable. Not to mention the dire consequences for authors, who have been hit in a multiplicity of ways.[1]

Despite a few exceptions, the restart has been generally difficult for bookshops and sales outlets, with falling demand from readers and insufficient financial resources identified as the main factors of fragility for the resumption of activity. Understandable safety measures will mean that activity in bookshops will not go back to normal for at least a few more months. Should more bookstores end up shutting down for good, the damage will be both amplified and made more permanent.

The shift of sales towards online and digital channels, in addition to not compensating in most cases for the loss of physical sales, means that a higher volume of sales stems now from less profitable segments, be it due to additional delivery costs (online sales of physical books), lower prices, higher royalties and more concentration in retail (ebooks) or smaller revenues per unit (subscriptions).

The postponement of many titles will also have lingering disruptive effects on the market: launching most delayed titles in a short time would risk a crowding of new releases, which will inevitably have a negative effect on the sales of individual titles; the alternative will be further delays, which will eventually depress the overall production for years to come. Moreover, new releases also follow precise strategies related to timing, and that has been disrupted as well. Book fairs and other events are in many cases still suspended, and for those that are supposed to go on there is uncertainty, both in term of formats and attendance and of what may actually happen in a few months.

The overall economic situation will also play an important part in how the sector is affected in the coming months. If many people lose their jobs and salaries, a reduction in consumption will be inevitable and will significantly affect book sales. Publishers indicate this as a reason for concern in many countries, including those in which the market has not experienced significant downturns. For these reasons EIBF and FEP proposed measures for the recovery.

1 See the comprehensive EWC survey "The Economic Impact of COVID-19 on Writers and Translators in the European Book Sector": http://europeanwriterscouncil.eu/ewc-survey-covid19/.

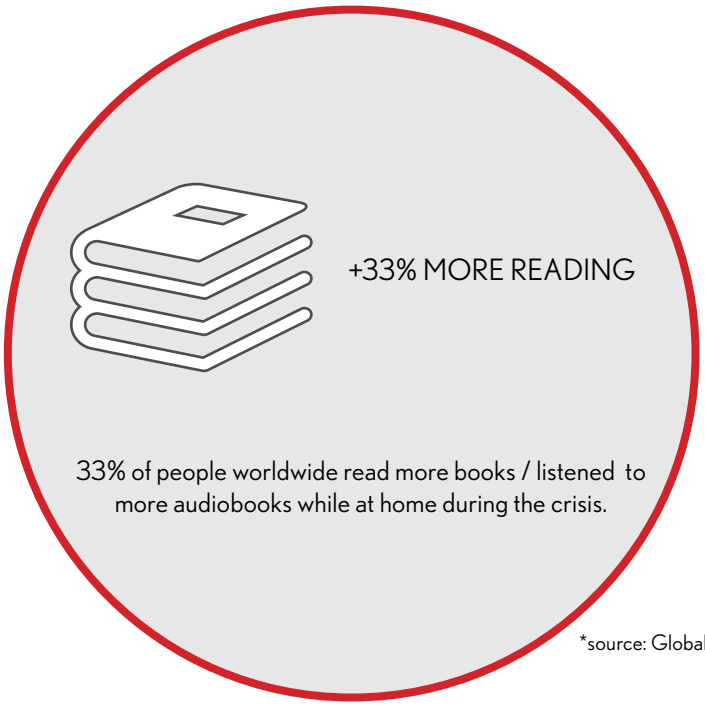
How readers reacted

Reading more, but through which channels?

It would be natural to expect people to have read more during the periods of lockdown. In fact, the Global Web Index Coronavirus Research of April 2020 revealed that 33% of people worldwide read more books / listened to more audiobooks while at home during the crisis. Whether this translated into more sales would be a legitimate question, and clearly the global sales figures show that the increased appetite for books did not, altogether, convert into an increase of book sales; on the contrary, despite the abundance of offering in bookstores and the expansion of library lending, there was rather an increase in piracy, and overall book sales did shrink, as amply shown so far.

Once again, this was due to the disruption of retail, as well as to economic difficulties and the fact that not everyone has access to online channels. In some countries, such as Germany, a peak of sales was recorded just before lockdown, as people stocked up on books in view of the confinement. In early May, over 50% of the population in the Netherlands declared to be reading books or ebooks or listening to audiobooks (compared to 43% watching streaming services), with so-called light readers accounting for most of the increase from before the crisis. The digital shift has been observed in readers' habits in several countries: by the end of April, 27% of French Internet users aged 15 and over said they had read at least one digital book over the last 12 months, compared with only 20% two weeks before; analyses of the results of the survey seem to reveal that digital book readers read even more digital books, whereas those who do not appreciate or practice reading on this medium did not lend themselves to it more. Still, there is reason to believe that some new users were brought to try digital books during the lockdowns in many countries.

At the same time, a recent survey in Italy revealed that people actually read fewer books during the lockdown: in May 2020, the share of people who declared having read at least one book (including eBooks and audio books) in the last 12 months was down from 73% to 58% compared to March of the previous year; those who did not read books in March and April were 50% of the population, while on an annual basis this share is 42%. The main reasons indicated by respondents for reading less were a lack of time, the increase in time spent following the news and the loss of pleasure in reading caused by worries about the situation. Beside the decrease in reading, people altogether bought significantly fewer books during the crisis: people who bought books in the previous 12 months were 35% in May 2020, compared to 63% a year before.



*source: Global Web Index Coronavirus Research April 2020

Winners (few), losers and those getting by

Some sectors were less negatively affected by the crisis, or to some extent even seemed to benefit from it: children's books performed better than the average of the market in almost all countries where data are available, and in particular activity books for children to play and/or learn did well, for obvious reasons. At anecdotal level, it is interesting to note how certain fiction titles became popular during the lockdown: Albert Camus' The Plague and Jean Giono's The Horseman on the Roof were bestsellers in France, for example, while Paolo Giordano's How Contagion Works topped charts in Latvia.

At the opposite of the spectrum, also for obvious reasons, travel books were basically wiped out of the market: in France they lost 72% of their market in March, and a whopping 97% during the lockdown from mid-March to mid-April; in Germany their sales were down 57% in March and more than 75% in April, and lost 36.4% overall between January and May; WH Smith recorded a -91% in travel book sales in April. With the gradual reopening of borders and the start of the holiday season, it will be interesting to see whether the sector can achieve at least a partial recovery, which is much needed; a further assessment will be necessary after the summer.

Another significant downside of the lockdown and the online shift was a sharp increase in digital piracy. For example, Spanish reproduction rights' organisation CEDRO recorded a tripling of the level of digital book piracy in Spain in April. This should not come as a surprise, given the increased interest in content of all types, and especially digital, and the erosion of the willingness to pay for such content. And this meant a further source of damage for everyone in the book value chain.

A word on education: how publishers stepped up to the challenge

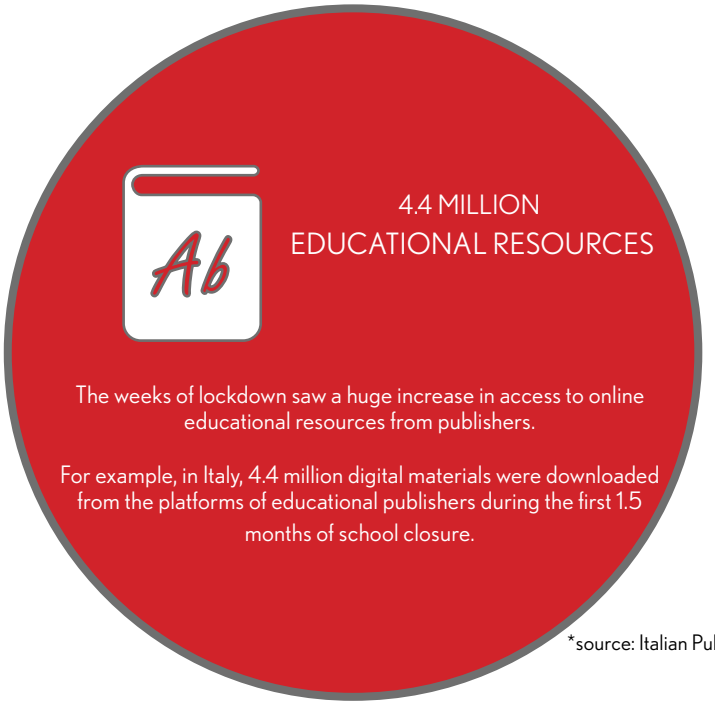
Publishers – educational publishers, first and foremost – were also affected by the closure of schools and higher education institutions all over Europe. With regard to sales, the impact depends very much on the cyclical nature of educational book sales. In countries where acquisitions by schools or family purchases had already taken place, there were no appreciable effects on publishers' turnover. However, in other countries there was an impact, although usually not as strong as with other sectors; in France, for example, schoolbook sales were down 20% at the peak of the crisis, but increased 4.4% in March – and extracurricular materials experienced an increase of 56% of sales, as parents prepared to provide children with tools to keep learning and exercising during the confinement. In countries where publishers rely heavily on schools for their sales (such as Malta), the school closure was very detrimental to the sector.

The most visible effect of the crisis on textbook publishers, however, was their massive mobilisation to accompany the switch of education to remote mode. Publishers in most countries had already created platforms for the provision of digital learning materials, often as joint ventures among several companies that offer a single access point to all resources. When schools closed, many publishers strengthened their offer on digital platforms and often allowed their content to be accessed for free during the lockdown. As existing platforms were scaled up, new ones where created where needed.

Usage of digital learning materials boomed. For example, users on educational publishers' platforms in French-speaking Belgium increased tenfold, with 200,000 students working on up to 1.6 million online exercises per day. In Flanders, some platforms recorded peaks of up to 14 times higher than average and required substantial investment in rapid capacity expansion, but also the necessary support for the millions of users. In Spain, use of platforms and digital content increased by more than 250%, while supporting tasks developed by educational publishers augmented between 80% and 120%. In Greece, publishers agreed to cover the cost for distributing books for public university students via courier services (their purchase is subsidised by the state); close to a million books were thus mailed within a month. Irish publishers reported a substantial increase in the number of users accessing online educational resource – in one case a 1,000% increase was recorded; in excess of 35,000 students and parents were accessing curriculum based content from educational publishers on a daily basis during the lockdown.

Just over one month after the schools' closure, a survey on the work of educational publishers to support primary and secondary schools in Italy revealed that students had downloaded 4.4 million digital resources from publishers' platforms (2 million digital textbooks – more than in the whole of the previous year, 1.9 million digital integrations, plus video lessons and exercises). Collaboration with teachers was very successful: almost 700,000 teachers attended at least one webinar providing free training for distance learning; and support for 372,000 helpdesk requests from parents and teachers (e-mail and telephone) was provided via publishers' customer care services.

The experience highlighted once again the value of textbooks and professionally published learning materials. The provision of digital materials for free, which many publishers felt was the right thing to do given the situation, is nonetheless not sustainable as a strategy for the production and distribution of quality learning content. There is a risk that an attitude of expecting not to pay for digital content become even more entrenched – as exemplified also by increases in illegal copying of books in schools (as was the case in Malta, for instance). This is all the more of concern as public budgets may feel the effects of the crisis in the coming months, leading to a reduction in funds for educational institutions and libraries. It will be therefore essential that governments foresee suitable budget allocations to acquire educational resources in schools.



*source: Italian Publishers Association (AIE) Research Department

Conclusion

At this stage, the only thing certain is that the book sector has suffered a serious blow from the COVID-19 pandemic, of which the precise dimensions are not yet clear – not least because of lingering and dynamic effects and delayed impacts. Targeted support measures would greatly help to address the fragility of the value chain and to prop up the sector's resilience, thus enhancing the chances for a swift and widespread recovery.

The book value chain has been affected differently in each country, and the impact of the crisis will be felt over the months and maybe years to come. It is indispensable for public authorities to take appropriate measures to repair the damages and rebuild the future.

FEP is grateful to its members for having shared data all along this difficult period. We will reproduce this stocktaking exercise at end of the year to achieve a clearer picture and reflect further developments.

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