



The international bookselling market in 2021

Analysing recent trends and connecting
the world's booksellers

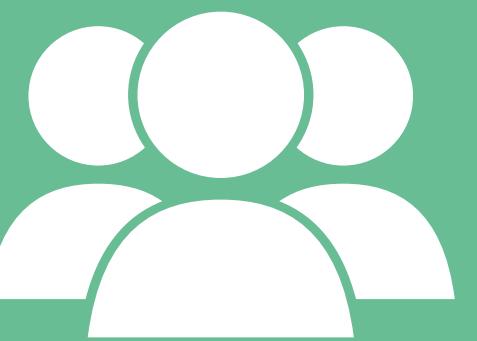
Introduction

- About EIBF: who we are and what we do
- Global bookselling state of play: 2019 to 2021
- Case study: Central and Northern Europe
- Bookselling trends on the rise
- Future development opportunities
- RISE Bookselling

About EIBF

- A non-commercial umbrella organization, representing national booksellers associations from all over the world
- Through its member associations, EIBF speaks on behalf of more than 25.000 individual booksellers of all kinds, including independent bookshops, chains, family businesses
- We have a long history of representing booksellers and advocating for book-friendly policies to the benefit of readers and retailers
- We facilitate knowledge sharing between our members and provide a forum for discussion and cooperation

**Our core belief
is that
bookshops are
pillars of local
communities**



Providing meeting
spaces



Investing in local
communities



Local bookshops
help with...



Improving reading
outcomes



Ensuring access
to literature

What we do

- We represent our members and their interests on a global platform, before the European institutions and other international organisations
- Our mission is to further the interests of the bookselling industry, by ensuring that the voices of booksellers are heard in every relevant debate
- We do this by meeting with decision makers from European and international institutions, explaining the specificities of the bookselling industry at different stages
- We strengthen the link between booksellers associations worldwide, to enable knowledge exchange, innovation and growth

Policy issues we aim to address

- Fair competition and level playing field for all retailers
- Fair platform-to-business relationships
- Interoperability of e-book formats
- Easier cross-border sales
- Tax simplification for small- and medium-sized enterprises (SMEs)
- Lower VAT rates on books
- Fair lending schemes by libraries for the benefit of the book chain and readers
- Copyright as the backbone of the book industry
- Freedom of expression across the entire book chain
- Promotion and access to books for all

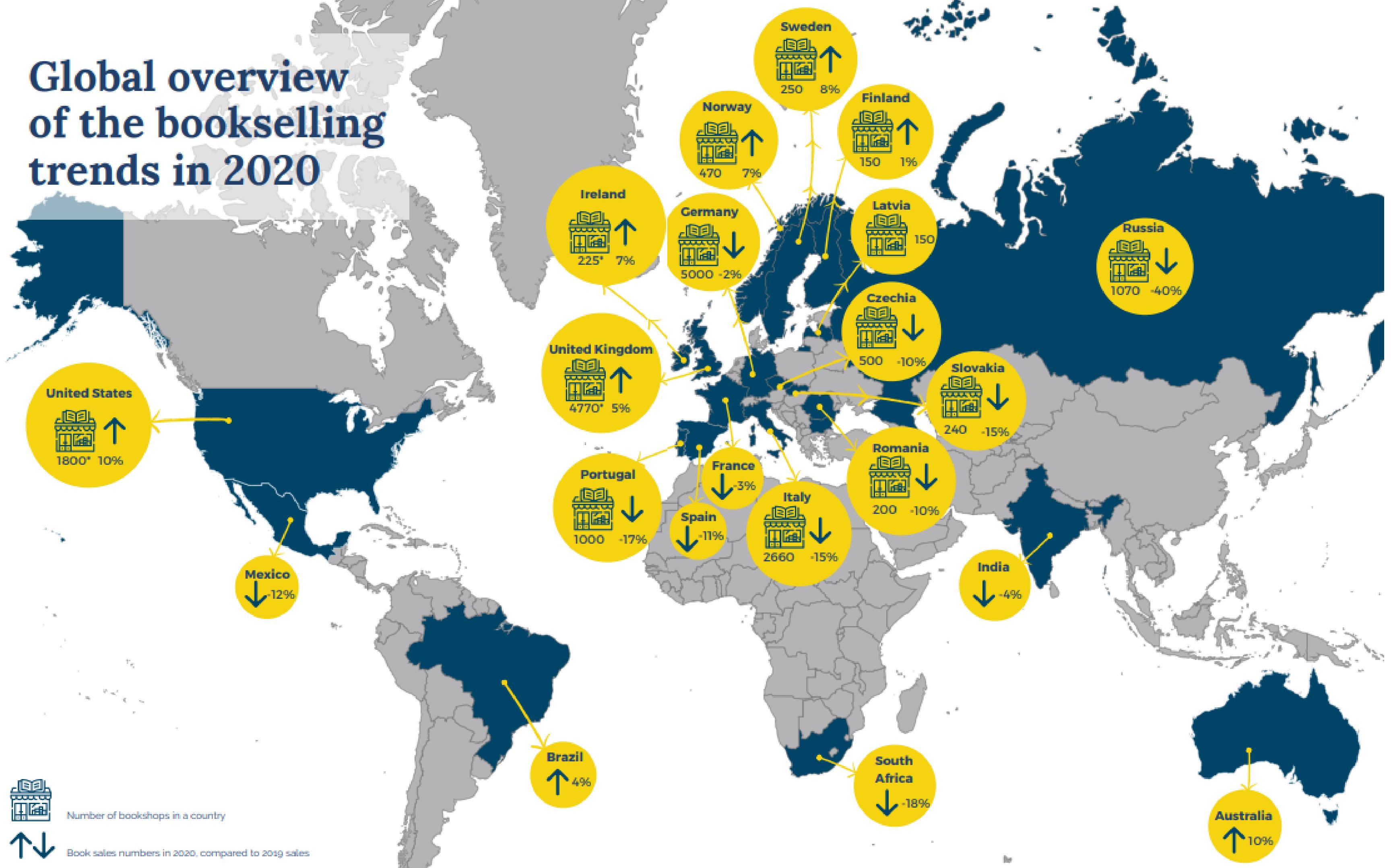
Global bookselling: state of play

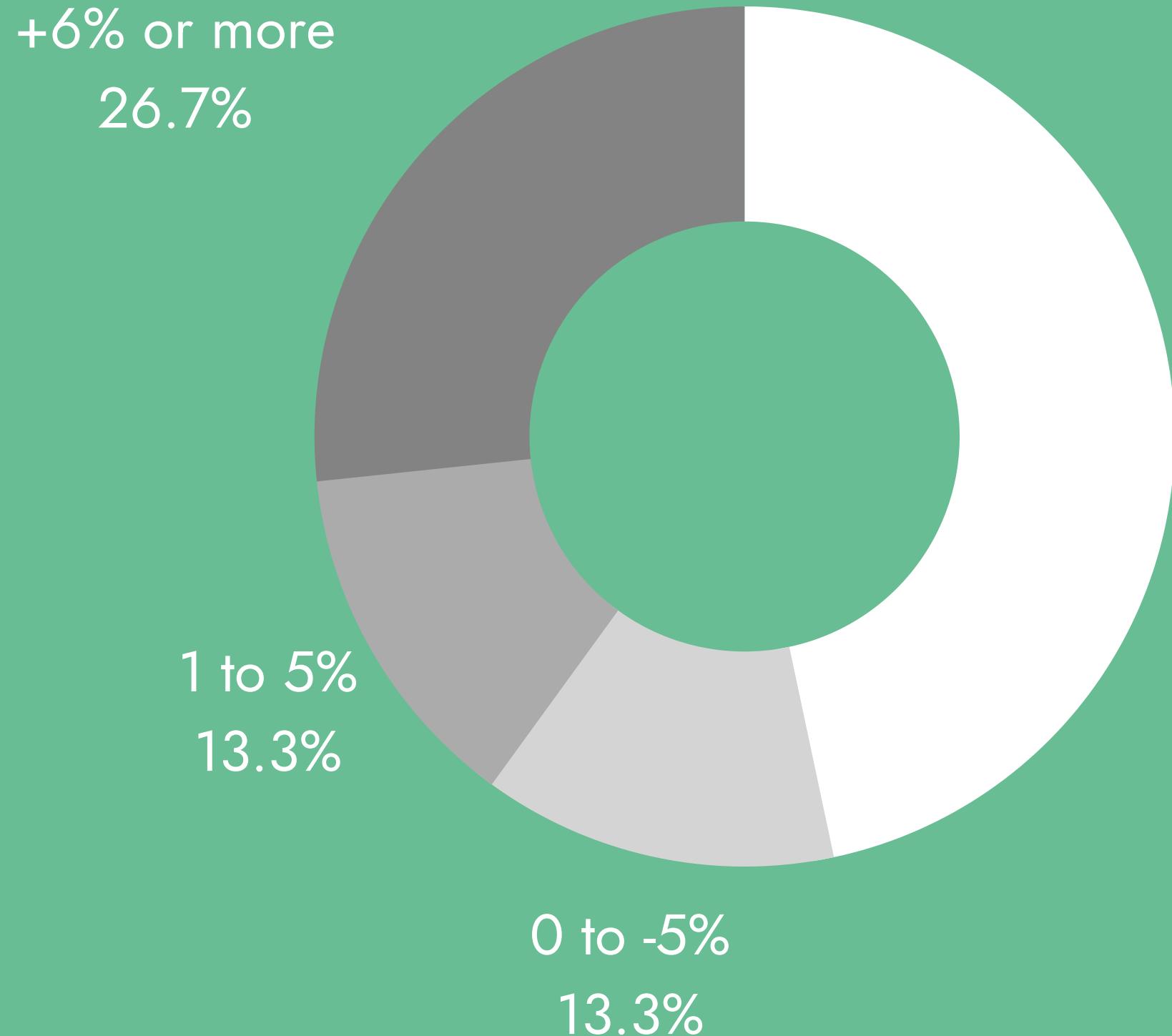
- Two years of pandemic have reshaped the global bookselling industry:
 - Unequitable growth across different channels
 - Adapted business models
 - Consumer behaviour change
 - Audiobook market rise
 - Bookshops recognised as essential

In May 2021, EIBF published a flagship report providing in-depth insights into the pandemic impacts on the bookselling sector in 2020



Global overview of the bookselling trends in 2020





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

-10% or more
46.7%

88%

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

29%

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

Government aid to book sector

- In all queried countries, governments provided subsidies for improving economic outlook and helping businesses deal with the impacts of the pandemic
- However, in a 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, e.g. improving their presence on digital channels, covering shipping costs for small retailers...
- **Positioning bookshops as essential in case of new lockdowns**

What can we learn from 2021 figures?

- At a first glance, the global bookselling markets are recovering across the board from the pandemic:
 - In 70% of countries, the sales have increased by 5%
 - In over a third of countries, sales have increased by 10%
 - In only one of the surveyed countries the sales have decreased in 2021, compared with 2020
 - End of year holiday sales have proven to be the best in years in several countries

What can we learn from 2021 figures?

- Not all growth is equitable, as physical retail remains impacted:

“ The months of store closures at the beginning of the year and the decline in footfall in the city centres have been a great challenge to physical bookstores in particular. They finished with a 3% drop in revenues compared to 2020 and an 11% drop compared to the pre-Covid year of 2019. On the other hand, many bookstores, even smaller ones, benefited from growing online sales. ”

German Publishers and Booksellers Association

- Largest growth was seen in digital sales and streaming services

Case study: Central Europe

- Findings:
 - Online strategy was crucial for driving the growth of book markets

“ The estimation is that every second physical book was sold online in 2021. ”

Swiss Publishers and Booksellers Association

- Physical retail sales drastically impacted
- Impact of paper shortage

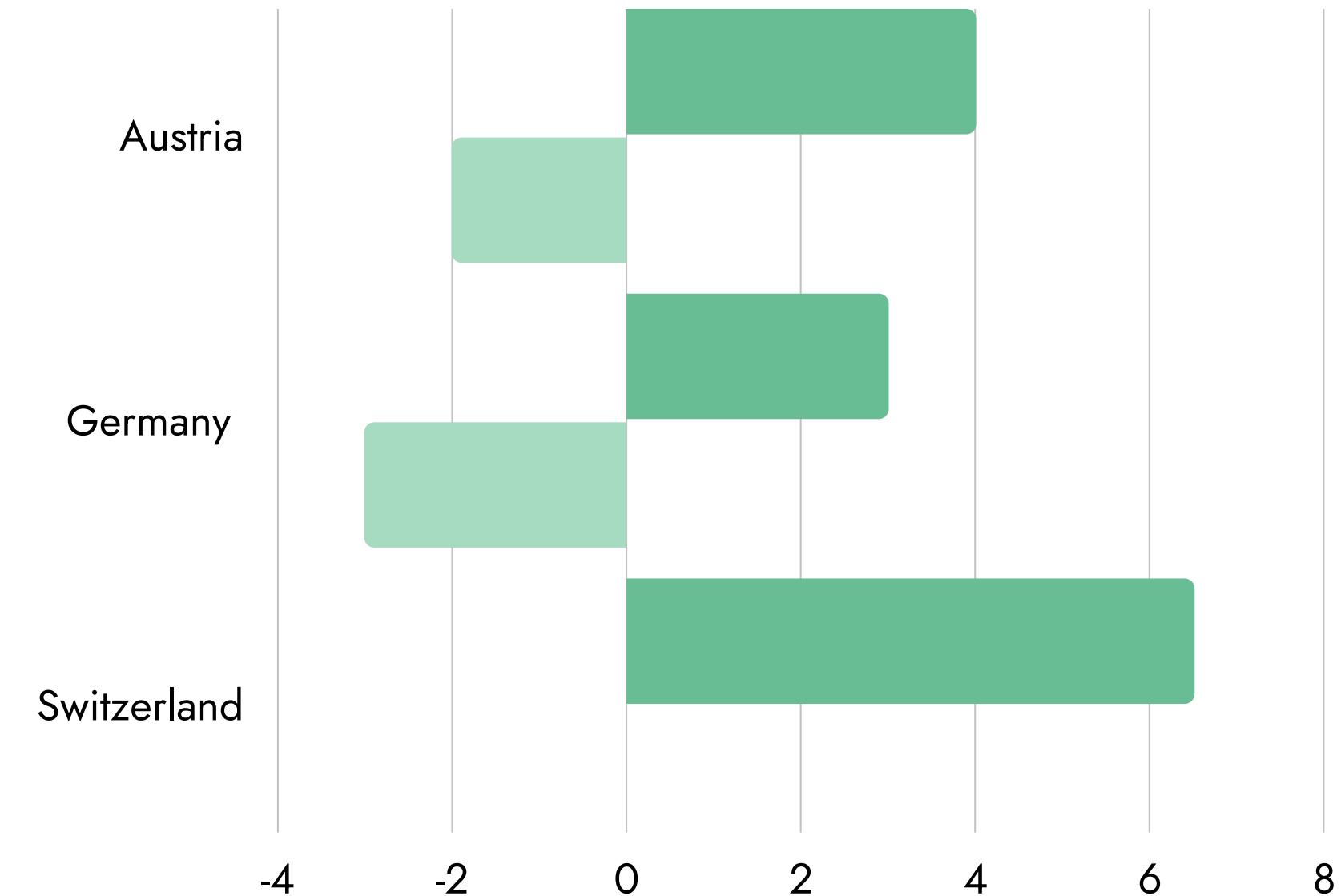


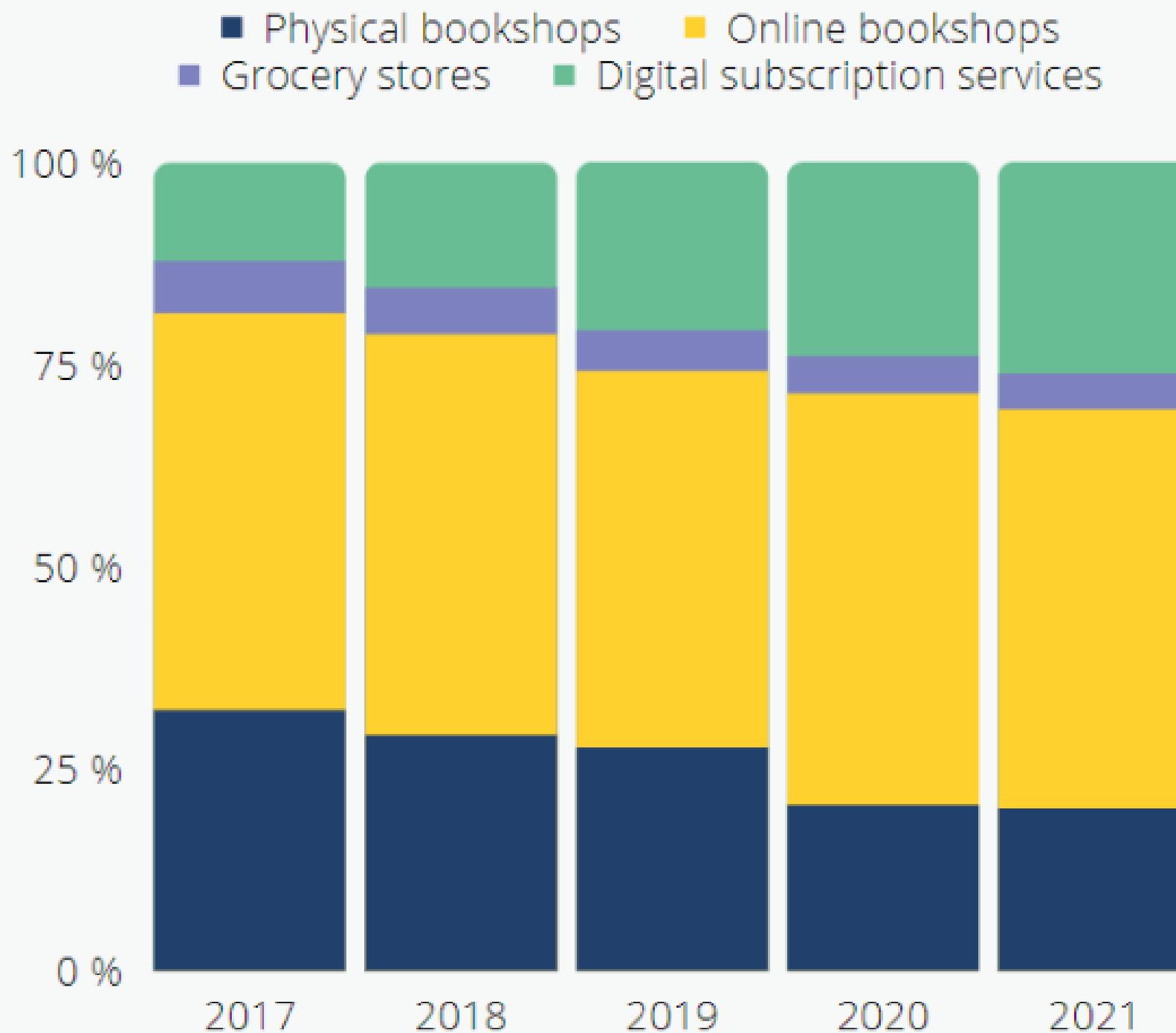
Chart 1: Total bookselling market turnover in 2021 vs. sales in physical bookstores (in %, reflecting the comparison with 2020)

Case study: Northern Europe

- Overall book sales are on the rise
- Physical sales continue to lag behind
- Shift to digital channels:
 - In Sweden, digital streaming services gained 16% of market share in 2021, compared to previous year

“ Readers had more time to read and digital channels made books easily available. ”

Swedish BA



Sweden: Multi-year overview of market share of various sales channels in %

Bookselling trends on the rise

- Despite national lockdowns and closed shops, the demand for books remained high throughout 2021
- Globally, we saw significant increase in online sales, with many booksellers developing their own online shop to compete with internet giants
- For booksellers on the ground, the combination of digital and physical is a winner
- Booksellers will continue to benefit from what they learnt during the pandemic (social media skills, delivery options, hybrid events)
- Booksellers are concerned by the decline in consumer footfall and are focusing on reaching their customers through many channels

Future development opportunities

- Upscaling digital presence and optimizing online sales channel
- Building a pipeline of events
- Reviving footfall in inner city areas, on other shopping/high streets and in communities
- Fostering local partnerships developed through the pandemic
- Supporting the climate agenda
- Reviewing the supply chain (dependence on paper, logistics, etc.)



How we can help: **RISE Bookselling**



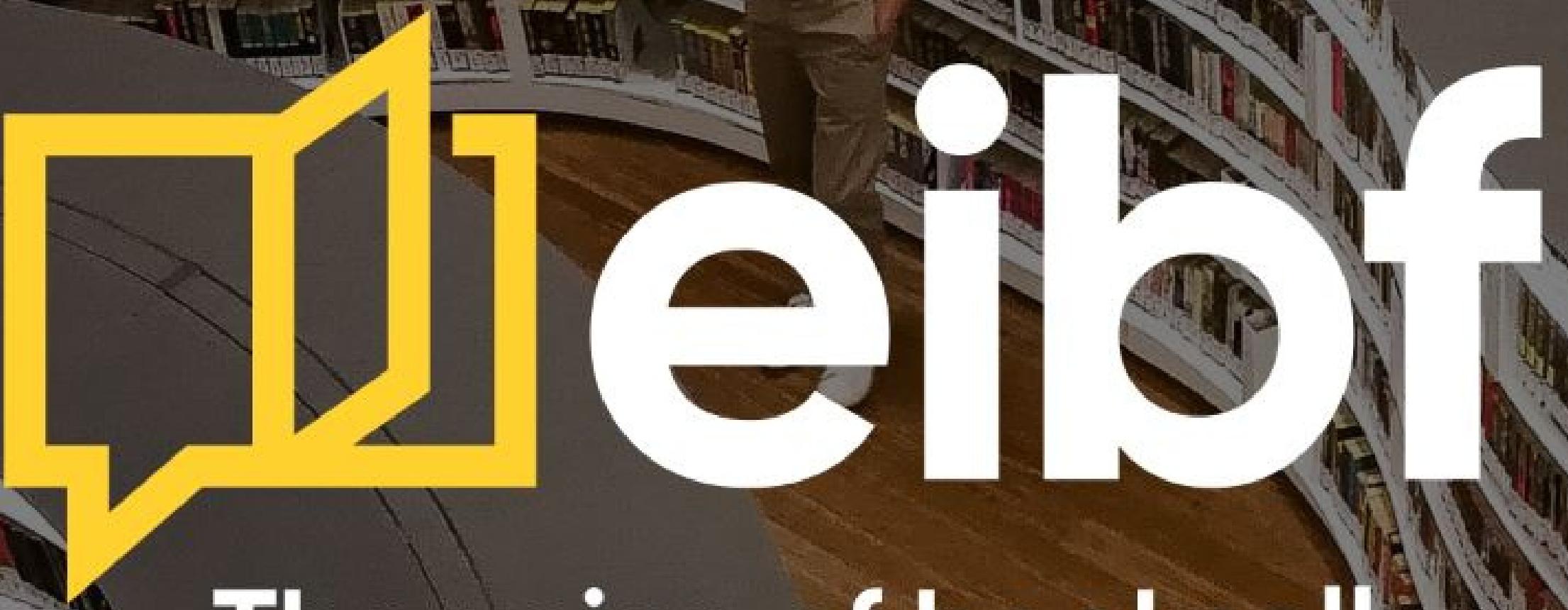
- Resilience, Innovation and Sustainability for the Enhancement of Bookselling
- Three-year, EU co-funded programme, aiming to upscale, reinforce and maximise the capacity and resilience of the global bookselling sector



How we can help: **RISE Bookselling**

- Connecting booksellers from all over the world, enabling them to learn from each other and improve their skills through:
 - Thematic webinars and trainings
 - Booksellers Exchange Programme
 - RISE Bookselling Conference
 - and much more...





The voice of booksellers

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