



international  
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association



# FROM RESPONSE TO RECOVERY

**THE IMPACT OF COVID-19 ON THE GLOBAL  
PUBLISHING INDUSTRY**

NOVEMBER 2020

# TABLE OF CONTENTS

Foreword	03
.....	
Introduction	04
.....	
IPA Member Impact and Response	06
.....	
COVID-19's Impact on Global Publishing	16
.....	
Member Support and Leading the Global Publishing Industry Recovery	30
.....	
Towards a Global Publishing Industry Recovery Plan	36
.....	
Moving Forward Together	38
.....	
Acknowledgments	39
.....	
Appendix	40
• Compendium of Member responses to COVID-19	40
• List of contributors and markets they represent	50



## FOREWORD

Less than a year ago, the impact the COVID-19 pandemic would soon have on our families, our lives, and our industry was unimaginable. As the virus spread around the world, publishing houses, bookshops, libraries, schools, and book fairs fell silent and, for the first time in living memory, the world's publishing ecosystem ground to a halt. With collective regret, the International Publishers Association (IPA) made the decision to call off its biennial Congress which I, like thousands of other publishers and book lovers around the world, had been awaiting with excitement.

Through these difficult months, we have had to come together, albeit digitally, to grapple with what this pandemic will mean for the future of publishing. The IPA has kept in continuous contact with its member associations throughout the crisis. In these conversations, a common narrative has risen above the check-ins and chatter: industry solidarity is essential if we want to emerge from this crisis stronger and more resilient.

Drawing on 33 interviews with senior global publishing executives from August to October 2020, this report describes how the COVID-19

pandemic has affected IPA members and the wider publishing ecosystem. The national publishers associations that contributed to it represent markets that generate around \$90 billion in annual sales, accounting for roughly 70% of the global publishing market and more than three billion readers.

The interviews revealed a bruised industry whose pain is likely to continue in 2021, yet we were also encouraged by examples of resilience and new cooperation amid adversity. In most markets, the pandemic caused sharp declines in book sales as the entire publishing supply chain, from authors to readers, was affected. But there are also silver linings and small triumphs that should not be ignored. The year has shown that necessity really is the mother of invention as publishers embraced digitization to redefine inclusivity, partnered to support communities under lockdown, and tossed out the rulebook to make life-saving scientific research available to all.

In catalyzing this much-needed dialogue on the future direction of our industry, our goal is to build the foundations for a global publishing industry recovery plan informed by the voices and needs of publishing ecosystem stakeholders. The development of this unified plan will be indispensable to navigating the ever-changing landscape positioning our industry for recovery, and embracing new opportunities for growth.

**BODOUR AL QASIMI**  
**VICE PRESIDENT**  
**INTERNATIONAL PUBLISHERS ASSOCIATION**





## INTRODUCTION

The coronavirus pandemic has taken a heavy toll on the global publishing industry. Cancellations of major book fairs and industry events, lockdowns, and disruptions to global supply chains have badly hit global publishing sales. In response, printing presses, publishers, and bookshops have been forced to pull down the shutters, leaving them and other publishing industry stakeholders out of pocket. Meanwhile, aside from a few notable exceptions, governments have largely neglected the publishing and creative sectors by failing to extend specific financial support to this vital industry in its moment of need.

Despite the monumental obstacles, national publishing associations and their allies jointly launched support programs to protect the communities they serve and help publishers weather the storm. Leveraging resources and partnerships, the publishing world has supported millions of children in the move to homeschooling, provided free access to research to fast-track vaccine development, and lobbied governments for relief so they can continue to meet the needs of isolated readers.

However, in many countries, the true extent of the pandemic's effects on the industry is only now becoming apparent. Small publishers are struggling, bookshop sales have slowed and face an uncertain future, title releases are being delayed, and major publishing industry events – the lifeblood of much of the book business – are being canceled. While the long-term impacts of the pandemic are still unknowable, there is a real risk that many companies may not survive to see the consequences. Those that do will have to adapt to accelerating digitization trends that may outlive the pandemic and fundamentally transform our industry.

As the publishing industry has somewhat restabilized, it must now shift from stop-gap thinking and emergency measures towards a long-term, sustainable, and actionable recovery plan. Spurred by this unprecedented moment in global publishing, this report will introduce IPA members to emerging good practices for surviving the pandemic and facilitating continued ecosystem cooperation in adapting to the new reality.

## About This Report

No one is better placed to take the temperature of the global publishing industry than national publishers associations, which make up the bulk of the IPA membership. IPA members are at the centre of the publishing community in their countries. Their longstanding relationships with publishers, authors, bookshops, educators, and governments mean they have their finger on the pulse of frontline industry developments and sentiment.

This report was developed from video interviews and written responses to a questionnaire. Ideally, the process would have canvassed the

entire IPA membership, but resource and time constraints obliged the selection of 33 members representing geographical diversity and differing market maturity. Of the respondents, 40% were from Asia, 27% from Africa, 17% from Europe, and 17% from the Americas, while 37% of responses were from high income countries, 37% were from upper middle income countries, and 27% were from lower middle income countries. The information gathered therefore provides viewpoints from a representative cross-section of the global publishing market, and national markets of varying levels of maturity.





# IPA MEMBER IMPACT AND RESPONSE

## Adversity Has Bred Innovation and Partnerships

When the World Health Organization (WHO) declared the COVID-19 outbreak a 'global health emergency' in January 2020, IPA members continued to operate cautiously. But when that was upgraded to a 'global pandemic' in March, their operations were significantly affected by ensuing prevention and containment measures.

A fundamental function of national publishers associations (PAs) is convening publishers in person, through working groups, meetings, and events.

But when offices and workplaces were ordered to close, it halted programs and activities for many PAs as they transitioned to remote working and assessed how best to support their members' evolving needs. In most cases, PAs were forced to adapt to the circumstances with little or no government support. While some countries adopted broad-based, economy-wide stimulus packages, in most the publishing and broader cultural industries were not initially classified as 'essential' or entitled to industry-specific stimulus measures.

STATUS OF GOVERNMENT ECONOMY-WIDE, CULTURAL, AND PUBLISHING SECTOR STIMULUS PLANS

Country	Economy-wide Stimulus	Cultural Stimulus	Publishing Stimulus
Argentina	✓		
Australia	✓	✓	
Brazil	✓		
Canada	✓	✓	✓
China	✓		
Egypt	✓	✓	✓
France	✓	✓	✓
Germany	✓	✓	✓
Georgia	✓		✓
Ghana	✓		
India	✓		
Indonesia	✓	✓	✓
Italy	✓	✓	✓
Ivory Coast	✓		
Japan	✓		
Jordan	✓		
Kenya	✓	✓	
Mexico	✓	✓	
Morocco	✓	✓	✓
New Zealand	✓	✓	✓
Nigeria	✓		
Philippines	✓		
Russia	✓	✓	✓
South Africa	✓		
South Korea	✓		
Spain	✓	✓	
Thailand	✓	✓	✓
Turkey	✓	✓	
UAE	✓	✓	✓
UK	✓	✓	✓
US	✓	✓	



Some IPA members faced sharp drops in revenue due to publishers' inability to pay dues as sales dried up, which made covering operating expenses challenging. Faced with these financial challenges, national PAs resorted to a range of defensive measures, such as temporary salary cuts, member fee discounts and waivers, and extended payment plans. However, only a handful of members received direct government support.

**MEMBERS THAT RECEIVED GOVERNMENT STIMULUS ASSISTANCE BY TYPE OF ASSISTANCE**

Member	Grant	Wage Subsidy	Tax Relief
Publishers Association of Argentina		✓	
Australian Publishers Association		✓	
Association of Canadian Publishers	✓	✓	
Egyptian Publishers Association	✓		
Kenya Publishers Association			✓
Turkish Publishers Association			✓
UK Publishers Association		✓	

For PAs that derive a substantial portion of their revenues from organizing book fairs and conferences or as their country's International Standard Book Number (ISBN) agency, diversifying revenue streams while strengthening services to members was key to survival. Associations innovated by taking book fairs online, offering experiential virtual events, creating online marketplaces, and through other initiatives, such as monetizing online training. Several of these innovations present non-dues revenue generation strategies that may continue post-pandemic and be emulated by other IPA members.

## Members are Innovating Amid Adversity

### *Taking Book Fairs Online*

**Georgia:** Due to the cancellation of the Tbilisi International Book Fair, more than 20 publishers came together to host the Tbilisi Virtual Book Fair, with live streaming via social media. The event enabled publishers to sell online and encouraged many Georgian Publishers and Booksellers Association members to adopt digital business strategies.

**Philippines:** The Educational Publishers Association partnered with the Book Development Association of the Philippines and the online marketplaces Shopee and Lazada to host Aklatan, the biggest book fair in the country. The 26 participating publishers sold 28,000 books, generating \$120,000 in revenue.

### *Launching Online Member Marketplaces*

**Indonesia:** Encouraged by the successful online hosting of the Jakarta Book Fair, with 85 publishers offering 31,000 titles in partnership with Shopee and Tokopedia, the Indonesian Publishers Association (IKAPI) developed a marketplace to support members in selling online year-round. The marketplace allows members to upload their titles and manage fulfilment with IKAPI providing marketing guidance and a payment gateway. The marketplace is being used by the Association's chapters in 18 provinces to facilitate nationwide sales and distribution.





## Building Systemic Industry Resilience

As COVID-19 disrupted day-to-day operations, PAs quickly adopted operational contingencies while transitioning their services to help publishers stay informed, make the case for government assistance, support members' digitization strategies, and build ecosystem coalitions. The 33 responses captured in this report indicate the emergence of increasingly sophisticated strategies for engaging government and publishing stakeholders to build systemic industry resilience. National publishers associations implemented a range of measures to respond to the evolving challenges.

**Constant Communications:** Associations issued frequent COVID-19 updates and established instant communications channels, such as WhatsApp groups and telephone helplines, to stay connected as the pandemic evolved.

**Australia:** The Australian Publishers Association used online stock data from its TitlePage portal to provide status updates to retailers on distributors' ability to supply books, and to avoid supply chain disruption and lost sales through stock outages.

**New Zealand:** The Publishers Association of New Zealand became a founding member of the Coalition for Books, a coordinating body that includes representatives from New Zealand's booksellers, authors, and literary festivals. Formed in response to the pandemic, the coalition works on joint initiatives, promotes reading, and supports industry recovery.

**Russia:** The Russian Publishing Union created a WhatsApp group to exchange insights on business resilience strategies and provide peer support.

**United Kingdom:** The Publishers Association offered a business support helpline that members could call for free advice on government programs, employment law, health and safety standards, taxes, and other aspects of operational continuity.



**Lobbying for Stimulus Programs:** PAs engaged with governments to make the case for publishing-specific stimulus programs. As the pandemic dragged on, their appeals were amplified through joint industry statements, member surveys, broad publishing ecosystem alliances, and strategic data releases on the impacts of the pandemic on the publishing ecosystem, and on building the case for designating the publishing industry as 'essential'.

**Brazil:** The Brazilian Book Chamber, Brazilian Publishers Union, and National Association of Libraries came together to jointly lobby financial institutions for favourable loans and payment deferrals for publishers in the absence of government assistance for publishing.

**EU:** The Federation of European Publishers worked in partnership with its 29 national publishers association members to secure European Union level support for the industry. The Federation used joint statements, reports, and high-level meetings to advance 10 specific measures to be taken at EU and national levels to support the publishing industry.

**Georgia:** The Georgian Publishers and Booksellers Association published a crisis plan aimed at guiding the government's stimulus package for the publishing industry. The plan featured nine initiatives, including tax exemptions, interest free loans, establishment of small grant programs and government purchasing programs for the educational publishing sector.

**Thailand:** The Publishers and Booksellers Association of Thailand successfully lobbied the government to adopt a similar stimulus program as in 2019, which allows taxpayers to deduct up to \$91 of book and textbook purchases from personal income taxes.

**USA:** The Association of American Publishers used its influence to support the wider publishing ecosystem through a letter to Congress backing an American Library Association appeal for \$2bn in government grants to public libraries.





**Online Support Resources:** Associations developed resource pages on their websites giving information on government assistance programs, business resilience guidance, workplace health and safety requirements, member corporate social responsibility initiatives, and developments with other publishing ecosystem members, such as booksellers and wholesalers.

**Germany:** The German Publishers and Booksellers Association provided an online resource compendium, accessible from their homepage, which includes information on government stimulus programs, draft letters to apply for government programs, and information on Association support resources. The

Association also hosted a series of webinars on various topics.

**New Zealand:** The Publishers Association of New Zealand set up a resource page with links to government leave support schemes, small business cashflow loan programs, and wage subsidy relief initiatives.

**Turkey:** The Turkish Publishers Association established a page on its website with information on financial support and grant programs available to the publishing industry and provided regular updates to members via social media.

**Online Training, Business Assistance, Capacity Building, and Peer Support:** Associations transitioned their training, advisory, skills building, and networking programs online.

**Canada:** The Association of Canadian Publishers started a free Emergency Business Consulting Program, which matched members with veteran publishers and consultants experienced in business planning, crisis response, and human resources management to develop business resilience plans.

**Indonesia:** The Indonesian Publishers Association partnered with online marketplaces, such as Tokopedia, Bukalapak, and Google, to provide members online training on eBook development, online sales, and digital marketing.

**Nigeria:** The Nigerian Publishers Association offered online webinars on business resilience and online training on eBook development, producing audiobooks, and digital transformation.



**Demand-side Ecosystem Cooperation:**

Associations worked with bookseller, library, and author trade bodies to lobby governments to increase or expedite government institutional book purchasing for schools and libraries. They also collaborated across the publishing ecosystem on reading promotion campaigns, local bookshop support campaigns, and advocating for government-funded book voucher programs.

**Egypt:** The Egyptian Publishers Association won the support of the Ministry of Culture's Libraries and the General Authority of Culture Palaces to allocate a significant portion of the budget allocated to book purchases to support Association members as the industry lost significant sales from the cancellation of Egypt's two major book fairs.

**Latin America:** The Mexican Publishers Association led an online regional campaign involving several Latin American publishers associations to promote reading and online book sales.

**USA:** The Association of American Publishers partnered with the Authors Guild and American Booksellers Association to support independent bookstores as in-store sales fell while consumers bought books online. The Association of American Publishers also encouraged consumers to visit [indiebound.org](http://indiebound.org), an online independent book store locator, and contributed to a bookseller assistance fund managed by the Book Industry Charitable Foundation.

**Publisher, Educator, and Librarian Cooperation:**

In response to school and library closures and the migration to online learning, associations facilitated dialogue between publishers, teachers, and librarians to overcome differences of opinion on copyright to offer free resources and waive licensing fees to enhance accessibility to books and learning resources for students, teachers, and parents.

**Canada:** In response to school closures, the shift to online learning, and library closures, the Association of Canadian Publishers and Access Copyright partnered on the Read Aloud Canadian Books Program. The Program temporarily waived licensing fees for reading select books online live or via recorded video. The initiative strengthened cooperation between publishers, teachers, and librarians while bridging divergent views on copyright.

**India:** The Federation of Indian Publishers partnered with the National Book Trust, a publishing house under the Ministry of Education, on the #StayHomeIndiaWithBooks initiative to offer more than 100 free titles in regional languages in PDF format as part of efforts to make people stay home.

**Kenya:** The Kenya Publishers Association cooperated with the Kenya Institute of Curriculum Development to offer digital textbooks for free online to enable public school students to transition to online learning.

**Proactively Addressing Emerging Industry**

**Challenges:** In some cases, libraries, educators, and other interest groups used the pandemic as a rallying point, calling for copyright exceptions while digital piracy surged as education moved online and eBook sales increased. Associations met these emerging challenges with requests for government intervention, digital piracy campaigns, and public statements countering interest group narratives.

**Canada:** In response to a Canadian Library Association call to relax copyright due to school and library closures, the Association of Canadian Publishers responded by reiterating that its members' books can be acquired commercially, while objecting to the opportunistic use of the pandemic to lobby for expanded exceptions for education and teaching.

**Jordan:** The Union of Jordanian Publishers appealed to the government through high level meetings and public statements to combat piracy and illegal textbook downloads as use of digital textbooks surged during school and university closures.

**South Korea:** The Korean Publishers Association lobbied the Ministry of Education to issue guidelines for preventing textbook piracy and reinforced adherence to the guidelines through an awareness campaign on its website, social media, and through mainstream media. The Association also documented instances of copyright infringement to maintain political urgency and assert the rights of its members.

**Association-led Community Engagement:**

Associations stewarded their members' campaigns to engage with local communities by supporting initiatives such as book donations and making COVID-19 research available for free.

**Global:** The International Association of Scientific, Technical, and Medical Publishers worked with its members to provide free access to scientific articles and research on COVID-19 as a show of solidarity to assist global vaccination and prevention research efforts.

**China:** The Publishers Association of China worked with members to publish and translate 100 books and articles on China's efforts to contain COVID-19, which were distributed to 29 countries.

**South Korea:** The Korean Publishers Association organized a book donation program for hospitalized COVID-19 patients through which 102 publishers donated 14,000 books.





# COVID-19'S IMPACT ON GLOBAL PUBLISHING



## Isn't Publishing Essential?

Despite its long-acknowledged role in driving socio-cultural development and the growth of knowledge economies, the publishing industry found itself in a unique predicament as COVID-19 was assigned 'global pandemic' status. Despite coming out quickly to support governments, education systems, and the scientific community in responding to the initial wave of the virus, publishers in many countries were nonetheless told that their industry was 'non-essential.'

As such, the publishing workforce was strongly encouraged or mandated to work from

home and critical components of the complex publishing ecosystem, which gets books into the hands of readers, were closed or subject to severe operational limitations. While some IPA members successfully lobbied governments to reopen critical touch points in the publishing value chain, such as bookstores, supply chain disruption nearly brought the industry to a standstill in most countries as it struggled with technology-enabled contingency plans and finding interim routes to market.

## Supply Chain Disruption Leads to Ecosystem Stress

Publishers operate in a complex ecosystem with printers, logistics providers, distributors, and retailers, meaning the supply-chain effects of COVID-19 control measures caused significant supply disruption. While publishers shifted to remote work to ensure operational continuity, the broader publishing supply chain faced a barrage of operational challenges: printers experienced financial difficulties due to cancelled orders, closures, and paper shortages; global freight flows were disrupted as transport companies navigated border closures and export-dependent publishers could not fulfil international orders; distributors and wholesalers were closed or operationally limited, which meant bookstores faced supply shortages; retailers, from large bookstore chains and supermarkets to independent, community bookstores, were closed or left unstocked, and payments to supply chain counterparts were delayed, threatening the viability of the sector's many small and medium-sized publishers and booksellers. Since global printing and paper vendors tend to invoice in hard currency, some multinational publishers in economies experiencing currency devaluation also encountered steep cost increases. Study contributors highlighted that book printers face major financial difficulties that may mean delays and delivery time uncertainty due to the postponement of backordered titles to 2021.

## Closures, Delays, Stockouts, and Battered Economies Hit Book Sales Hard

The interdependence of the publishing ecosystem means that a weakness at any point affects the health of the whole industry. In mid-March, publishing markets globally faced a perfect storm of challenges that significantly reduced book sales. Interviews for this report revealed global publishing markets split between two starkly different outlooks: significant, double-digit short-term losses which subsequently rebounded, or minimal losses in markets that experienced major sales losses and now foresee slow recoveries due to reductions in consumer purchasing power, lower institutional purchasing budgets, and less developed digital economies.



MEMBER VIEWS ON MARKET OUTLOOKS AND RECOVERY ACROSS GLOBAL PUBLISHING MARKETS

Country	Growth or Recovery in Progress	Decline with Weak Recovery
Argentina		Sales suffering due to decreased consumer purchasing power and currency devaluation which has increased costs for publishers and will slow recovery
Australia	Sales decline of 30% at the height of first wave with sales rebounding and now showing YOY growth	
Brazil		Sales down 60-90%. Publishers have to adapt to online sales and closure of offline sales channels
Canada	Sales decline of 20-50% at the height of first wave with sales rebounding upon reopening	
China	Decline of 9% in H1 with sales rebounding	
Egypt		Sales down 70% with the cancellation of regional book fairs expected to slow recovery
France	Decline of 66% in sales in first wave with sales estimates 25% lower than 2019	
Germany	Decline of 50% during lockdown with estimates 2020 sales will be 10% below 2019	
Georgia		Sales down 13% with a slow recovery expected
Ghana		Sales down 80% with a slow recovery expected due to decreased consumer purchasing power
India		Decline of 40% with recovery expected mid-2021
Indonesia		Decline of 50-80% with recovery stalled by halt in institutional purchases, inconsistent recovery
Italy	Decline of 20% forecast in April, narrowed to a 10% decline over 2019 as sales recovered in July	
Ivory Coast		Decline of 40-80% with recovery heavily dependent on educational purchases
Japan	Increased sales but official figures not available	
Jordan		Decline of 60-95% with slow recovery expected
Kenya		Significant decline due to school closures since 90% of market is education
Mexico	Decline of 30% compared to 2019 with early signs of recovery	
Morocco		Decline of 70% with slow recovery expected
New Zealand	Decline of 5% from 2019 with signs of recovery	
Nigeria		Significant decline with slow recovery expected due to decreased consumer purchasing power and struggling economy
Russia	Decline of 30% during first wave with recovery to reduce overall 2019 decline to 10%	
South Africa	Sales down 60% from 2019 with signs of recovery	
South Korea	Sales marginally affected but no official data	
Spain	Sales down 22% from 2019 with signs of recovery	
Thailand		Sales down 35-40% from 2019 for larger publishers and 70-80% for small publishers with declines in consumer purchasing power expected to hamper recovery
Turkey		Sales down 20% from 2019 with slow recovery due to decreased consumer purchasing power and struggling economy
UAE		Sales down 50% from 2019 with book fair cancellations to slow recovery
United Kingdom	Small and medium sized publishers forecasting a 26-75% decline on 2019 with bigger publisher revenues holding up better. While domestic sales show recovery, export sales may be slower to rebound	
United States	Decline of 4% from 2019 with signs of recovery	





## An Emerging Story of Two Types of Book Markets

### Features of Markets on the Road to Recovery

- Experienced sudden economic recoveries upon reopening, which drove up book sales
- Joined-up government lobbying and advocacy by several players in the publishing ecosystem that asserted the value of publishing in the pandemic and negotiated stimulus programs and reopening of key supply chain pinchpoints
- Larger domestic book markets with local printing capabilities and resilient logistics industries
- More mature digital economies with prominent online marketplaces that sell books and high levels of online purchasing penetration
- Strong national cultures of reading in which reading increased despite other competing forms of media

### Features of Markets Facing Uncertain Recoveries

- Economies harder hit by shutdown measures with significant drops in consumer purchasing power and often facing currency devaluation, where books are considered luxury goods
- Publishing markets with heavy reliance on institutional sales
- Less developed digital economies, difficult to quickly transition to digital publishing and online sales to reach readers
- Heavier reliance on physical events, like book fairs, as a sales channel
- Smaller domestic book markets with significant reliance on global logistics for export sales
- Emerging national cultures of reading often losing potential readers to competing media such as streaming video, video games, and social media



## Business Continuity in Crisis

As the pandemic wreaked unprecedented supply chain disruption on global publishing, it underscored the importance of business continuity strategies. With the publishing workforce at home, adoption of online collaboration tools to manage a remote workforce became critical. As publishers adapted to workplace flexibility, the shutdown of book retailers, schools, libraries, and global literary events caused sharp drops in revenues, particularly for small and medium-sized publishers<sup>1</sup>, which often concentrate on a single sector and are more dependent on bricks and mortar retail. As revenues dried up and traditional routes to market were barred, publishers met a range of operational challenges to business continuity.

**Embracing Remote Work:** With a history of using freelancers and contractors, the publishing industry widely embraced work from home. While some firms found this adaptation easier than others, flexible work modalities are apparently here to stay. Publishers increasingly view flexible work as an opportunity to access geographically dispersed talent while reducing operating expenses through more reliance on project-based work and outsourcing. Many respondents foresaw the normalization of remote working

and virtual meetings in the industry to reduce travel and commuting costs as publishers rebuild their financial foundations. Normalization of these trends as cost-cutting resilience strategies may have second order effects, such as falling attendance at international book fairs and rights trading events as publishers rebuild.

**Reducing Costs:** While some publishers benefited from wage subsidies and job retention schemes, many faced the painful reality of downsizing workforces to adapt to depressed demand<sup>2</sup>. With counterparty payments delayed along the value chain, an inability to collect receivables, and surging costs, working capital crunches have also led many publishers to postpone titles to 2021. According to respondents, this cost cutting is anticipated to have knock-on effects throughout the industry well into 2021, with elevated costs of printing and paper and supply chain bottlenecks casting title delivery schedules into doubt.

**Eliminating Concentration Risks:** In attempting to stabilize sales, publishers quickly realized the negatives of concentration risk. Overreliance on a single client, retail channel, sector, book format, marketing channel, or supply chain node prompted accelerated efforts to build digital resilience and, in many instances, take initial steps towards full organizational digital transformations to diversify revenues.

<sup>1</sup> A number of contributors indicated that small and medium-sized publisher sales are more severely affected by COVID-19 due to concentration of revenue streams, reliance on limited distribution channels, and fewer internal resources and capabilities to adopt digital resilience strategies. This conclusion is supported by formal sales data from countries like Thailand and the United Kingdom, which show small and medium-size publisher revenue erosion of up to 80% with larger publishers experiencing sizable but less extreme losses.

<sup>2</sup> Several respondents indicated government workforce assistance programs did not accommodate the publishing industry's reliance on freelancers and contractors. This left publishers badly affected financially by COVID-19 with very few options to contain workforce costs beyond redundancy.

## The Digital Opportunity

According to members, the pandemic has freed up more time for reading and has significantly influenced how and what people read. In nearly 60% of the countries polled, people are finding solace in reading more during the pandemic, and they are increasingly trying new digital reading formats. While the jury is still out on whether digital reading trends will continue post-pandemic,

reaching housebound readers has significantly shaped publishers' product, distribution, and operational decisions as the disruption continues. Digital transformation, for the time being, remains the go-to strategy for publishers to limit losses. However, according to most members consulted for this report, online sales are not sufficient to fully offset lost offline sales.

Member Views on the Impact of COVID-19 on Reading			
Country	Positive	No Change / Decline	Trending Genres/ Formats
Argentina		Likely decline in reading due to reduced affordability and accessibility of books	<ul style="list-style-type: none"> <li>- eBooks</li> <li>- Change in genre preferences is unclear, but online news and social media are emerging as lower cost alternatives</li> </ul>
Australia	Australian Council survey found 36% of people are reading more during the pandemic		<ul style="list-style-type: none"> <li>- eBooks</li> <li>- Children's books, puzzles, activity books</li> <li>- Short-term, life-long learning courses</li> <li>- Higher education digital learning platforms</li> </ul>
Brazil		No change in reading habits due to competition for reader attention from streaming media, video games, social media and a lack of a reading culture	<ul style="list-style-type: none"> <li>- eBooks, specifically adult fiction and trade titles</li> <li>- Digital school and university textbooks</li> </ul>
Canada	Presumed to have increased with formal studies underway		<ul style="list-style-type: none"> <li>- eBooks</li> <li>- Digital lending from public libraries, particularly children's literature</li> <li>- Children's, juvenile, activity books</li> </ul>
China	Presumed to have increased due to stay at home orders but no formal studies		<ul style="list-style-type: none"> <li>- eBooks and audio books</li> </ul>

Country	Positive	No Change / Decline	Trending Genres/ Formats
Egypt		No change in reading habits due to competition for reader attention from streaming media and TV and variation in internet and delivery infrastructure affecting access	<ul style="list-style-type: none"> <li>- Uptick in general non-fiction, children's, self-development, philosophy sales</li> <li>- Audiobooks</li> <li>- Increased eBooks demand from libraries</li> <li>- Digital textbooks are experiencing a surge in demand from universities</li> </ul>
France		No change in reading habits with uncertainty still prevailing	<ul style="list-style-type: none"> <li>- Children's books, educational supplements</li> <li>- Digital textbooks - Digital textbooks</li> <li>- Digital lending from public libraries</li> </ul>
Germany	Presumed to have increased due to stay at home orders but no formal studies		<ul style="list-style-type: none"> <li>- eBooks and audio books</li> <li>- Children's, young adult books</li> </ul>
Georgia	Presumed to have increased due to stay at home orders but no formal studies		<ul style="list-style-type: none"> <li>- eBooks</li> <li>- Children's, self-help books</li> <li>- Digital textbooks</li> </ul>
Ghana		No change in reading habits with emerging culture of reading	<ul style="list-style-type: none"> <li>- Emerging interest in eBooks and digital textbooks but capacity development is needed for publishers</li> </ul>
India	Increased due to stay at home orders but no formal studies		<ul style="list-style-type: none"> <li>- Slight increase in eBooks and audio books</li> </ul>
Indonesia	Increased due to stay at home orders but no formal studies		<ul style="list-style-type: none"> <li>- eBooks</li> </ul>
Italy		Formal study showed a decline in reading during lockdown	<ul style="list-style-type: none"> <li>- eBooks</li> <li>- Children's, specialist non-fiction books</li> <li>- Online educational resources</li> </ul>
Ivory Coast	Reading increased with emerging culture of reading		<ul style="list-style-type: none"> <li>- Emerging interest in eBooks but capacity development is needed for publishers</li> <li>- Children's and young adult, personal development, and political books</li> </ul>



Country	Positive	No Change / Decline	Trending Genres/ Formats
Japan	Increased due to stay at home orders but no formal studies		- eBooks and audiobooks - Comics, study books, mystery novels
Jordan	Increased due to stay at home orders and expanded digital lending from public libraries		- eBooks - Digital textbooks
Kenya		No change in reading habits	- eBooks - Motivational books
Mexico	Presumed to have increased due to stay at home orders but no formal studies		- eBooks and audiobooks - Children's and young adult, cooking, self-help
Morocco		No change in reading habits	
New Zealand	Presumed to have increased due to stay at home orders but no formal studies		- Audiobooks
Nigeria		Likely decline in reading due to reduced affordability and emerging reading culture	- Emerging interest in eBooks but capacity development is needed for publishers
Russia		No change in reading habits	- Children's, classic fiction books
South Africa	Presumed to have increased due to stay at home orders but no formal studies		- Online educational resources
South Korea	Presumed to have increased due to stay at home orders but no formal studies		- eBooks - Reference, economics, business, self-help, Children's and young adult, personal finance books - Digital textbooks and online educational resources
Spain	Increased due to stay at home orders		- eBooks and audio books - Children's and young adult, history books
Thailand		No change in reading habits with emerging culture of reading	

Country	Positive	No Change / Decline	Trending Genres/ Formats
Turkey	Presumed to have increased due to stay at home orders but no formal studies		- eBooks and audiobooks - Dystopian, history, science fiction, personal development, health and wellness books - Online educational resources
UAE		No change in reading habits with emerging culture of reading	- eBooks and audio books - Self-help books - Online educational resources
United Kingdom	41% of people are reading more due to stay at home orders		- eBooks and audio books - Crime, thrillers, popular fiction
United States	Presumed to have increased due to stay at home orders but no formal studies		- eBooks and audiobooks - Romance, political - Online educational resources

In response to the unfolding digital opportunity presented by the pandemic, publishers pivoted towards digital and online commerce to make up for lost sales from physical distribution channels. Despite the continuing dominance of print, publishers globally responded to broader digital acceleration trends by diversifying their product ranges to include eBooks, audiobooks, and interactive books. However, digital publishing is not a panacea for all markets. In low- and middle-income emerging publishing markets, for example, mobile device penetration, limitations of digital payments, and low trust in ecommerce limit the appeal of digital formats.



## The Rise of eBooks and Audiobooks

In nearly all countries covered by this report, members described notable sales growth of eBooks and audiobooks. Many publishers received assistance from national publishers associations in developing eBooks and audiobooks as consumers shifted to online purchases and sought out new digital formats. Library closures also supported trials of digital formats as digital lending replaced physical lending and compensated for decreased accessibility to bookstores. With bigger publishers often better positioned to transition to digital formats, small and medium-sized publishers may be less able to benefit from the uptick in the rise of digital formats.

As digital routes to market remained one of the only ways to reach locked-down readers, publishers also recognized the importance of enhancing their ability to sell via online retailers and direct to consumers from their own websites. Many publishers shifted to online sales for the first time as bookstores closed and literary events were canceled. For smaller publishers and publishers in countries with evolving digital economies<sup>3</sup>, digital transformation was more of a challenge as they either did not have websites, had not previously used their websites for online sales and fulfilment, or had previously only used their websites for monetizing backlist titles. Emerging ecommerce regulations in developing digital economies around the application of VAT to digital services also made publishers think twice about selling online. In some cases, such as Canada, the absence of special postal rates for shipping books make the economics of selling books online less favourable. In others, such as Georgia, Nigeria, and



the Philippines, with limited online book outlets, national publishers associations have stepped in to develop online marketplaces where their members can sell books.

With the broad shift of readers purchasing and discovering titles online, publishers have also had to adapt how they market books and broker rights. Before the pandemic, bookstores, public libraries, and literary events were key channels through which readers and rights buyers discovered new authors and titles. Now, title discovery and marketing strategies, such as author readings, lectures, and book clubs, have moved online, with publishers signalling that social media, digital marketing, and live streaming will be much more important in retailing and rights sales post-pandemic and may even eclipse traditional marketing and sales strategies.

<sup>3</sup> Several respondents indicated government workforce assistance programs did not accommodate the publishing industry's reliance on freelancers and contractors. This left publishers badly affected financially by COVID-19 with very few options to contain workforce costs beyond redundancy.

Members consulted also said the digitization of marketing, sales, and rights trading has the potential to reduce business travel longer-term as book fairs adopt blended on- and offline programs. However, increasing use of online marketing and discovery strategies, according to contributors, may also negatively affect bibliodiversity and independent publishers by skewing sales towards bestsellers and bigger publishers with hefty marketing budgets, and by reducing international publisher appetite to license titles from emerging authors in developing markets.

## Bookstores Were Caught Off Guard

In countries heavily reliant on bookstores for sales and discovery, insufficient prior investment in digital transformation was made clear as coronavirus prevention measures forced shop closures. With customers unable to discover new authors and titles over coffee or leaf through a book before buying, the lure of the bookstore chain and the independent, community bookstore required redefining during the pandemic. Most bookstores, according to contributors, had not invested in technology beyond a website detailing their location and opening hours.

With lobbying support from the publishing community, bookstores reopened and quickly adapted their businesses by developing online stores and offering curbside pickup and delivery. While independent bookstores reaffirmed their relevance to communities as anchors of stability, staying open while large bookstore chains closed, publishers are increasingly concerned about the longer-term survival of independent bookstores

post-pandemic. Social distancing requirements mean they must restrict customer numbers and prevent them from handling books.

Several publishers see the pandemic as the possible trigger for a reduced reliance on bookstores, with ecommerce displacing their role as a critical reader and discovery touch point. With smaller bookstores hit harder financially by the pandemic than large book chains, publishers expressed uncertainty about the longer-term implications. They fear that reduced reliance on bookstores will affect title and author marketing and discovery by limiting events, readings, and try-before-you-buy experiences. There is also a fear that larger chains may contribute to worsening the financial woes of small and medium-sized publishers by reducing bibliodiversity due to inventory preferences for fast moving, bestselling titles from large publishers. With competition for shelf space high due to the delay of titles to 2021, many titles from smaller independent publishers may not reach shelves in a crowded marketplace.





## Digitally Accelerated Trends

### Increased Adoption of New Digital Formats

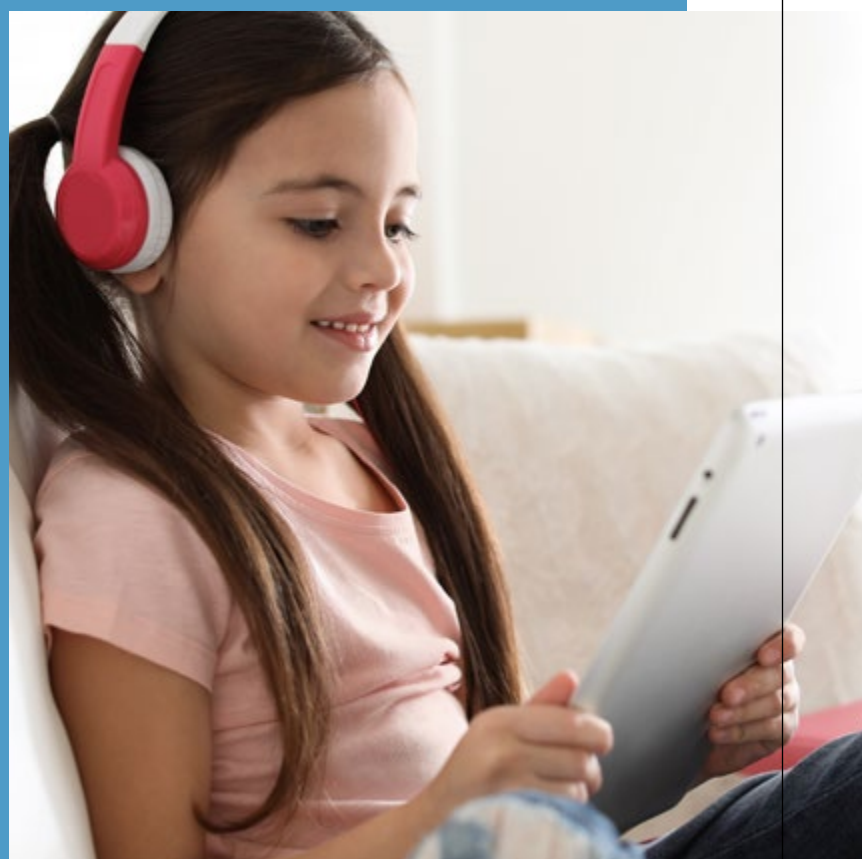
- eBook and audiobook trial and sales surged due to on-demand culture and reluctance to visit bricks and mortar stores or wait for delivery
- New digital formats, like chatbooks and eBook subscription services, are emerging in Asia, combining reading with online social connectivity and peer referral
- Library e-lending is reinforcing the adoption of eBooks as public libraries and bookstores stay closed

### Genre Preferences are Evolving with the Times

- Demand for children's books, puzzles, and activity books have increased due to homes also becoming offices and learning environments
- Juvenile and young adult categories have surged due to school closures, home schooling, and parents having to help provide education and entertainment
- Demand for digital textbooks and online educational resources increased due to school closures and the transition to remote learning
- Self-help and personal development resources have experienced surging demand as readers use their time in lockdown to build skills and focus on lifelong learning

### Book Selling, Purchasing, and Discovery is Adapting to the New Normal

- Small and medium-sized publishers are adopting digital-first strategies
- Independent bookstores are developing ecommerce and fulfilment capabilities to compete on localized service and unique catalogues by smaller publishers
- Book fairs are providing hybrid on- and offline experiences
- Publishers are shifting to online author and title marketing and discovery strategies
- Educational publishers are adapting to home-based teaching and learning while incorporating student and teacher wellbeing in product development



## Adapting to Remote Teaching and Learning

With educational systems around the world focused on getting children back to school, health and safety protocols have overshadowed practical considerations about what educational resources suit socially-distanced classrooms and whether hybrid and remote learning may return amid subsequent waves of COVID-19. In a spirit of corporate social responsibility, many educational publishers offered digital textbooks and educational resources for free or at a heavy discount. While the gesture increased the interest of global educational authorities in digital textbooks, some publishers maintained that the strategy could inadvertently undermine the value of the publishing sector by entrenching government expectations of free or discounted educational content. To the industry, how government budgets will impact institutional sales to education and public library systems remains a worrisome unknown. On the other hand, accelerated adoption of online teaching resources as part

of a broader global shift towards blended learning and fully remote learning may offer notable opportunities in many markets.

In some countries, the response of educational publishers in supporting unplanned, abrupt transitions to remote learning using online resources coincided with the first time that education officials, teachers, and students had been exposed to blended and online learning. Overall, according to participants in this analysis, COVID-19 has strengthened the relationship between publishers and the education sector as teachers sought permission to read books aloud and for other digital uses of content as schools transitioned online. While calls from libraries and education interest groups to relax copyright and provide free or discounted content have grown, they have been met by educational publisher counternarratives about the need to invest and innovate amid pressure to adapt to evolving post-pandemic learner demands.

## Piracy: a Downside of Digital

Transition to online learning encouraged the use of digital textbooks, which led to a surge in the sharing of copyrighted educational content between teachers and students. Many schools did not have additional funds to acquire online learning materials, and piracy increased markedly. Participants in this report also pointed

to greater adoption of digital publishing products leading to a surge in digital piracy. They cited a need for a global campaign to highlight the value of publishing to key constituents and raise awareness of the harmful consequences of digital piracy on sectoral investment and innovation.

# MEMBER SUPPORT AND LEADING THE GLOBAL PUBLISHING INDUSTRY RECOVERY

## IPA Supporting Members and Partners Through the Crisis

As the coronavirus pandemic spread globally and the gravity of its impact on the publishing industry began to manifest, IPA reacted quickly to support members and partners in the publishing ecosystem. In early March, IPA began a series of listening sessions with members and partners in around 70 countries to understand how their publishing markets were affected by the pandemic and how IPA could help. In these discussions, the need for industry solidarity, community, and information sharing emerged as the best way IPA could initially support members and partners through the industry crisis.

Amid health and safety concerns, the IPA made the decision to cancel the 33rd International Publishers Congress, and pivoted to assisting members and partners to absorb the initial impact of the pandemic. For example, the IPA compiled an online pandemic resource for the global publishing industry inaugurated with a personal message of solidarity from President Hugo Setzer. Its purpose was to enhance member information sharing and provide a single resource on the latest industry developments in the early days of the pandemic.

IPA has kept up frequent online member check-ins through webinars and panels that provide a glimpse into the pandemic's evolving effects on global publishing. It has supported members in effective advocacy approaches for engaging governments on targeted publishing industry stimuli through global advocacy initiatives like the Moscow Call for Action and the World Book Day Call for International Support.

IPA is also bringing together ecosystem stakeholders in solidarity to highlight the value of publishing and reading through partnerships with UNICEF and WHO to encourage millions of children in isolation through the #ReadTheWorld initiative, supporting UNESCO's Global Education Coalition, and collaborating with the United Nations on the SDG Publishers Compact.

In supporting members and partners in their pandemic responses, IPA has also sustained its efforts to champion freedom to publish while also providing an alternative voice to interest groups using the pandemic as a pretext to erode publisher copyright protections.

## Calling for Global Publishing Solidarity and Cooperation in Crisis

### Facilitating Member and Publishing Ecosystem Information Sharing

- Participated in the panel The Future and Potential of Books in the Era of Corona at Seoul International Book Fair
- Hosted a series of online events with Frankfurt Book Fair on several topics vital to the publishing industry's pandemic recovery
- Hosted webinar sessions on the impact of COVID-19 on the publishing industry in India, the Arab World, China, the Caribbean, Africa, ASEAN region, USA, Latin America, Europe
- Hosted webinar session on the impact of the pandemic on the global publishing value chain

### Supporting Members in Lobbying for Publishing Industry Stimulus Programs

- Supported a coalition of authors, publishers, and booksellers in issuing a Call for International Support as part of World Book Day
- Supported the Moscow Call for Action to call on global governments to adopt publishing –industry specific stimulus and industry support policies
- Called on EU governments to consider economic support packages for publishers
- Provided input to a Federation of European Publishers report on the impact of the pandemic on the publishing ecosystem in Europe
- Called on the Brazilian government to drop plans to impose VAT on books

### Providing Online Training, Business Assistance, and Capacity Building

- Launched the Africa Publishing Innovation Fund to support African entrepreneurs tackle remote education challenges in Africa
- Signed and promoted the United Nations SDG Publishers Compact

### Catalyzing Demand-side Ecosystem Cooperation

- Launched the Read The World social media campaign to inspire children, in collaboration with UNICEF and the WHO

### Promoting Publisher, Educator, and Librarian Cooperation

- Joined UNESCO's #LearningNeverStops Coalition to support countries in scaling up distance learning practices and reaching at-risk youth

### Continuing to Proactively Address Emerging Industry Challenges

- Called for comprehensive digital licensing regimes to protect publishers' copyright from violations through digitization of content, to mark World Intellectual Property Day
- Called on publishers to adopt digital technology to adapt to arising distribution challenges, at the Nigeria Virtual Book Fair
- Promoted advocacy initiatives on copyright policies in Brazil, China, India, and Kenya
- Supported the Union of Belarusian Writers, expressed concern over book censorship in Hong Kong, and spotlighted media crackdowns in Vietnam
- Contributed to a fund for IPA Prix Voltaire Special Award laureate Faisal Arefin Dipan





## Helping Members on the Road to Recovery

In parallel with the shifting demands on the publishers they serve, national publishers associations will need to adapt their services in response to post-pandemic member resilience-building, recovery efforts, and responding to new and emerging opportunities. Contributors to this report articulated several areas of potential IPA assistance to support organizational recovery:

**Continuing to Foster Communication:** Members highlighted an ongoing need to continue to share information on industry developments, trends, and effective initiatives for weathering the pandemic. In particular, the need for smaller group discussions with members in similar markets facing common challenges was highlighted as an effective way to continue promoting institutional learning and information

sharing. The Korean Publishers Association suggested that a dedicated online COVID-19 recovery platform may be useful.

### Supporting Government Stimulus and Recovery Program Advocacy

Eleven of the 31 publishing markets represented by report contributors were able to successfully lobby their governments for targeted, publishing-specific stimulus programs. The remainder pointed to government assistance programs that bypassed the publishing industry due to its classification in many countries as 'non-essential' and offers of generalized cultural industry assistance programs, which do not account for the particularities of publishing.

The need to enhance member advocacy capabilities to engage governments on a range

of publishing-related issues, such as the value of publishing, competition policy, reading and literacy, taxation, and digital piracy, appears key to moving the publishing industry up the agenda of global governments and attaining pan-publishing-ecosystem government recovery support. Members may also benefit from capacity development on successful data-driven advocacy strategies which enable them to quantify the negative impacts of the pandemic on the publishing value chain and solicit ecosystem-wide support packages, which could include wage subsidies, grants and interest-free loans, tax exemptions and extensions, preferential postage rates, and support for freelancers and contractors.

### Providing Digital Transformation Capacity

**Building:** Lockdowns and movement restrictions have forced much of the publishing sector to pivot online, in some cases for the first time. Members pointed to two areas of potential IPA support in response to pandemic-driven digital acceleration: digitizing national association member services to maintain or grow revenues, and supporting national publishing association members in their digital transformations.

In emerging publishing markets with developing digital economies, for example, there appears to be an opportunity for national PAs to digitize national book fairs, develop online marketplaces for members, and monetize supply chain information sharing to develop alternative non-dues revenue while supporting broader publishing market digitization trends. Several contributors identified a need for development

of post-pandemic alternatives to international book fairs and rights trading events in response to ongoing safety concerns about travel and increasing acceptance of conducting international business online.

With nearly every contributor to this report identifying the full-scale digital transformation of publishers as a necessity to ensure future operational resilience, members also highlighted the need for capacity building support in a range of emerging digitization topics. According to these members, the IPA could do this through courses, workshops, and guides covering eBook and audiobook development, ecommerce, digital and social media marketing, digital lending, and other digitization topics.





## Uniting Stakeholders to Create a Global Publishing Industry Recovery Roadmap

Contributors to this report underscored the need for a joined-up, ecosystem recovery roadmap to build systemic industry resilience and capitalize on new cooperations begun amid the adversity of the pandemic. As the global voice of publishers with convening power across the publishing ecosystem, there are member expectations that IPA unite industry stakeholders and provide leadership on pandemic-accelerated advocacy issues.

**Strengthening and Forging Alliances:** The pandemic's impacts on the entire publishing value chain have necessitated the forging of new strategic alliances between stakeholders whose views may have differed before COVID-19. This was important for creating new, more resilient routes to market during shutdowns. These arrangements have also strengthened publishers' relationships with libraries, teachers, technology companies, regulators, logistics providers, and others, and present an opportunity to reset global publishing's dynamics and bridge gaps. Among contributors to this report, there is a sense that much can be gained from sector-wide alliances and a universal adaptation to trends sparked by the pandemic. The next section of

this report contains a proposed approach to capitalizing on this new spirit of solidarity and a focus on common priorities for recovery.

**Understanding the New Normal:** With the shift to online learning and spikes in reader interest in digital formats, nearly every respondent cited a big rise in digital piracy. The surge in digital theft requires immediate action to support the industry in persuading governments to step up monitoring and enforcement. Equally important will be demonstrating piracy's harmful impacts on investment and innovation capacity at a time when publishers are under pressure to accommodate changing industry dynamics. At the same time, it is too early for national publishers associations to forecast the pandemic's likely long-term effects on consumer reading and purchasing habits. Currently, there is a lack of hard data on exactly what has changed: Where are readers discovering and buying books? Will the pandemic-accelerated digitization trends persist? Respondents highlighted the need for industry-wide cooperation on research, under the IPA's stewardship, to understand what the new reality means for the whole publishing ecosystem.





# TOWARDS A GLOBAL PUBLISHING INDUSTRY RECOVERY PLAN

## Fostering Cooperation Through a Multistakeholder Taskforce

As publishers began to suffer the pandemic's effects, member associations leveraged their networks and convening power to support others in the ecosystem. These multistakeholder coalitions successfully lobbied governments for support programs and forged a new sense of industry solidarity and cohesion.

As the global publishing industry transitions from emergency response to recovery, building

on this shared impetus for action demands a Global Publishing Industry Recovery Plan. To develop it, the IPA will lead an international, multistakeholder publishing taskforce comprising representatives of every link in the publishing value chain. The taskforce will seek consensus on the key common challenges, develop workable solutions, and identify potential partnerships and funding sources.

### Potential Ecosystem Stakeholder Working Group Participants

Authors and Illustrators	Reading Alternatives (E.g. Netflix)	Copyright, Collective Management Organizations
Printing and Paper	Libraries	University Publishers
Wholesalers and Distributors	Education Institutions	Scholarly Publishers
Bricks and Mortar Bookstores	Statistics Providers (E.g. Nielsen)	Book Fairs and Rights Trading Events
Leading Online Marketplaces	International organizations that Support Publishing, Reading, Freedom to Publish, Literacy	Publishing Standards Organizations

## Implementation and Progress Reporting

Implementing the Global Publishing Industry Recovery Plan will require a true multistakeholder partnership, not just in the face of the pandemic, but to ensure the industry's recovery, long-term sustainability and growth. Ensuring taskforce members' buy-in of the Plan would ensure their commitment to its implementation and in coordinating joint statements, government lobbying, and ecosystem-wide initiatives.

The Plan should be systematically reviewed and adjusted to effectively respond to changing developments, such as subsequent lockdowns triggered by additional waves of COVID-19. Periodic progress reports will increase the industry's ability to steer the recovery process, allow for corrective actions, and reinforce evidence-based, timely decision making.





## MOVING FORWARD TOGETHER

Publishing has long played an essential role in economies around the world, supporting the livelihoods of millions of authors, illustrators, printers, distributors, and booksellers. But more importantly, the industry is integral to our communities' ability to educate and elevate future generations, spread transformative scientific research, and open new worlds and mindsets to millions of people.

Throughout 2020, publishers have embraced this responsibility in inventive and resourceful ways to help communities through a uniquely challenging moment. Whether teaming up with educators to ensure children's learning could continue or lobbying governments to keep books in the hands of readers and

researchers, publishers around the world have shown themselves to be resilient and innovative in responding to sudden, unforeseeable change.

Yet despite these encouraging facts, the pandemic has exposed certain vulnerabilities in the publishing industry. With disruptions at every link in the supply chain, fixed routes to market and sudden lockdowns have left countless books collecting dust in warehouses, bookshops, and libraries. Critically, some publishers had not yet adapted to the inexorable shift towards digitization, an oversight that left them foundering when the pandemic shut off all sales channels but ecommerce. In addition, many publishing stakeholders were unsure where to find support or how to petition government for relief.

For publishers of all sizes, this crisis has been a brusque wake-up call to the need to find new, innovative routes to market and adopt diversified, durable business models. Now is the time to benefit from the cohesion built in adversity to craft a recovery strategy that enables the global publishing industry to rally stronger, more resilient, and more adaptable.



## CONTRIBUTORS AND ACKNOWLEDGMENTS



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# APPENDIX

## Compendium of Member Responses to COVID-19

### Frequent Member and Publishing Ecosystem Communications

**Australia:** Leveraging data from its TitlePage online stock portal, the Australian Publishers Association provided [status updates](#) to retailers on the ability of distributors to supply books and share information on occupational health and safety requirements with book distribution centers so that they could remain operational. The Board also met regularly to discuss the impact of the pandemic on the publishing industry and started a COVID-19 [update newsletter](#) for members

**Canada:** Sent regular updates to members, including COVID-19 developments in a biweekly newsletter, developed an [Independent Bookstore Directory](#) to support sales and conducted a member survey to determine the impact of COVID-19 on member operations

**Europe:** The Federation of European Publishers sent a daily newsletter highlighting developments in first month of the pandemic before transitioning to weekly updates

**France:** Provided updates via the news section of the Association's website

**Georgia:** Shared information on developments

via a [monthly newsletter](#) and promoted member good practices on social media

**Germany:** Hosted a weekly and later biweekly call / video conference with members. Also Provided a [weekly update](#) on book sales when bookstores reopened and released a [report](#) on the impact of COVID-19 on the publishing industry at Frankfurt Book Fair

**Ivory Coast:** Shared global, regional, and local information related to the pandemic and engaged with the African Publishers Network and other industry associations

**New Zealand:** Became a founding member of the [Coalition for Books](#), a coordinating body that includes New Zealand's booksellers, authors, and literary festivals to work on joint initiatives, promote reading, and support industry growth and viability

**Russia:** Created a WhatsApp group to exchange insights on business resilience strategies and provide peer support

**Turkey:** Sent biweekly and later weekly emails with updates and advice on weathering the effects of the pandemic

**United Kingdom:** Offered a business support [helpline](#) where members could get free advice on employment law, health and safety, tax and VAT advice

**USA:** Facilitated members accessing a Paycheck Protection Program that helped small publishers retain staff

## Lobbying for Stimulus Programs

**Belgium:** Lobbied the government for a €50 million [support fund](#). The Flemish Publishers Association also lobbied the Flemish Council of Ministers to consider books essential goods and to develop a video-based social media campaign on the value of the publishing sector

**Brazil:** The Brazilian Book Chamber, Brazilian Publishers Union and National Association of Libraries jointly lobbied the government for an extension for paying corporate taxes, sought [support package](#) from financial institutions that included expanding credit availability on favorable terms, and loan payment deferrals

**Canada:** Submitted an industry recovery proposal to the Canadian Government requesting a publishing industry-specific stimulus program, including increased funding for the Canadian Book Fund, limits on educational exceptions, and other postal, financial support, and tax policies

**Denmark:** Issued a [statement](#) on the impact of the pandemic on the national book industry and requesting government support

**Egypt:** Formed a committee that met with the Ministries of Culture, Education, Higher Education, Youth and Sports, and Local Development with the goal of allocating budgets for book purchases, introducing loan programs for publishers, and establishing community libraries to enhance book access

**Europe:** The Federation of European Publishers issued [two statements](#) on behalf

of their 29 members calling for support from governments at the EU and national levels

- Issued a [statement](#) calling for industry stimulus which was then used to lobby the national [ministers](#) of culture
- Issued a statement with [European](#) and International Booksellers Federation presenting 10 measures to be taken at the EU and national level to support the publishing industry
- Published a [report](#) in July titled European Publishing at the Time of Covid-19, highlighting the impact of the pandemic and seeking targeted industry support
- Campaigned to have publishing classified as an 'economic ecosystem' impacted by COVID-19
- Met the European [Commissioner](#) for Innovation, Research, Culture, Education and Youth to solicit support for the publishing sector

**France:** Conducted a [member survey](#) to support the development of concrete proposals for government support including subsidies, loans, tax exemptions, postal reforms, and increasing institutional sales as a form of stimulus. Also participated in the Federation of European Publishers survey to lobby for EU-wide industry support

**Georgia:** Developed an industry recovery plan to address immediate industry support and longer-term recovery programs such as flexible loans, grants, increased budgets for institutional purchases, financial support for the

Tbilisi International Book Fair, and increased competition in the educational publishing sector

- Continued to engage stakeholders to support the Tbilisi World Book Capital 2021 to highlight the importance of the industry and support financial recovery
- Obtained a higher budget from the government to reduce the publisher cost of participation in the Tbilisi International Book Fair to enable all publishers to participate
- For the first time in seven years, 17 small publishing houses were awarded school textbook printing contracts as a form of industry stimulus directly resulting from an industry recovery plan the Association had presented to the government

**Germany:** Lobbied the government for a stimulus package, which contributed to a [\\$54 billion](#) assistance program for the cultural, creative, and media sectors, including publishing, in March

- Lobbied the government for a stimulus package, which contributed to a €1bn assistance program for the cultural, creative, and media sectors, including publishing, in March
  - €20m out of the program NEUSTART KULTUR assigned to the book industry (€10m for publishers, €10m for booksellers), in August. Additional €4m supporting Frankfurt Book Fair 2020, in September
- Targeted lobbying for specific assistance to publishers and the publishing

ecosystem through press [outreach](#) and advocated for more specific assistance for publishers, authors, and wholesalers

- Identified eight specific [relief measures](#) for government consideration in April, including grants for SMEs, rental subsidies, loan guarantees, the simplification of government assistance program applications, the elimination of school book discounts, contributions to social security, delays in cash register requirements

**Ghana:** Supported members in applying for government stimulus programs

**Indonesia:** Deployed a [member survey](#) to influence government lobbying efforts aimed at securing targeted assistance such as wage subsidies, institutional buying, tax cuts

**Italy:** Conducted four surveys to monitor the impact of the pandemic on members, which channelled into a joint government appeal for [targeted stimulus](#) programs, including funding for public libraries to purchase books, book vouchers for consumers, wage support, loans, and rent postponements with the Italian Library Association and Italian Booksellers Association. The Association initially called for immediate stimulus measures followed by requests for a longer-term recovery strategy

**Ivory Coast:** Provided books to the Journalists' Union to secure media coverage of publishing industry difficulties, which was leveraged to support appeals for government support

**Mexico:** Developed a [joint industry statement](#) with the Association of Booksellers and Graphic Art Association to lobby on behalf of printers, publishers, bookstores, and other members of the publishing ecosystem for government support, loan deferrals, wage subsidies, expediting VAT refunds while also engaging in [strategic data releases](#) on the impacts of the pandemic

**Nigeria:** Published a strategic data release on the contribution of the publishing sector to Nigeria's economy along with a joint statement with the Nigerian Book Fair Trust on the need for industry-specific government support

**Norway:** Currently conducting [weekly surveys](#) of its members to assess impact of the pandemic to drive dialogue with national authorities

**Peru:** Called [on the government](#) to support the book production value chain

**Philippines:** Partnered with the Book Development Association of the Philippines to conduct an industry survey on the impact of the pandemic to inform lobbying efforts for targeted government assistance

**Russia:** [Lobbied government](#) for support, requesting subsidies and grants; Government economic stimulus packages included tax deferral and abatements (except VAT), grace periods for rental payments, drawdowns of insurance charges, and write-offs for interest-free credits for wages if 90% of staff are kept employed by the end of 2020. Lobbying efforts were strengthened by a [member survey](#)

**Spain:** Requested government support through [official letters](#) and meetings with the [Ministers of Culture and Finance](#)

**Sweden:** [Coordinated](#) efforts with members on securing support from the government

**Switzerland:** The German language publishers association (SBVV) created an [\\$875k fund](#) to support publishers

**Thailand:** Lobbied government to extend [tax deductions](#) on book purchases introduced in [2019](#) as a form of industry stimulus – stimulus programs allow all taxpayers to deduct up to \$91 of expenditures on books and textbooks from personal income taxes

**Turkey:** Lobbied for publishing to be included on government force majeure list, enabling publishers to become eligible for tax deductions, wage subsidy bank credits

- Convinced the Ministry of Culture to expedite library purchases as a form of liquidity for publishers facing cash crunches
- Surveyed members and booksellers to compile data to underpin advocacy and lobbying efforts

**United Arab Emirates:** Established the \$273,000 [Emirates Publishers Emergency Fund](#) in June with financial support from the government, including the Ministry of Culture and Youth, Sharjah Book Authority, and Sharjah Publishing City. The funds were distributed to 19 publishers [impacted](#) by cancellations of book fairs, contracts etc.



**United Kingdom:** Conducted a [survey](#) on the impact of COVID-19 on the publishing sector as well as soliciting feedback on the application process for accessing government resources, such as the Culture Recovery Fund

- Lobbying partially responsible for the government bringing forward the VAT zero-rating of eBooks to March 2020 rather than December 2020

**USA:** Built coalitions at the federal and state levels to support the publishing ecosystem. Leveraged these coalitions to lobby Congress for [\\$2bn in emergency funding](#) for public libraries

## Online Support Resources

**Australia:** Reduced the price of its online price, availability, and stock portal for small booksellers and retailers and developed an [online resource page](#) compiling government assistance programs, workplace requirements, export assistance, and impact on freight timings/prices

**Belgium:** Provided [information](#) on government support programs on the website

**Brazil:** Communicated government program developments to members via the [news section](#) of the association's website

**Canada:** Communicated government program developments to members via a [resource page](#) and developed the [Independent Bookstore Directory](#) to support sales

**Colombia:** Developed two social media campaigns, #AdoptaUnaLibrería and #CompraEnLibrerías, to promote sales of member titles

**Egypt:** Compiled a list of digital publishers to enhance cooperation amongst members and support the digitization of their catalogues

**France:** Compiled a list of government [support programs](#)

**Germany:** Developed an [online resource](#) that provides information on government stimulus programs, draft letters to apply for government programs, and association support resources

**Indonesia:** Provided online resource to support members in applying for government subsidy programs

**Italy:** Published a [daily newsletter](#) and compiled a [resource page](#) with information on the government stimulus, liquidity, and other support programs. Hosted webinars on how to apply for government assistance programs

**Netherlands:** Created an [online resource page \(English\)](#) for publishers

**New Zealand:** Established resource page on government [support programs](#), including small business cashflow loan programs and wage subsidy relief initiatives

**Portugal:** Made [advice](#) available on its online portal for members and started a [newsletter](#) on the evolving situation

**Russia:** Leveraged the [news section](#) on its website to provide information on government assistance programs

**South Africa:** Established a [resource page](#) to consolidate COVID-19 resources on offer

**Switzerland:** Livre Suisse created an [online guide](#) on protection measures for libraries and bookstores after reopening

**Turkey:** Established a dedicated web page featuring information on financial support and grant programs available to the publishing industry, and provided regular updates to members via social media

**United Kingdom:** Developed a compendium of the publishing industry's response to the pandemic, including content made available for free to students for educational, academic, and consumer publishers as well as a resource page on government support initiatives

Also offered a business support [helpline](#) where members could get free advice on employment law, health and safety, tax and VAT

**USA:** Developed a compendium of publisher Covid-19 responses on the [website](#)

**Association of STM Publishers:** Compiled a [resource page](#) on the website which provided access to coronavirus-related scientific research for free

## Online Training, Business Assistance, Capacity Building, and Peer Support

**Australia:** Offered online training and conference sessions, which also provided opportunities to connect socially

**Canada:** Temporarily paused its regular mentorship program to start an [Emergency Business Consulting Program](#) which matched members with veteran publishers and consultants experienced in business planning, crisis response, and human resources management to develop response plan; reassigned working committees to focus on COVID-19 response and information sharing

- The Association Nationale des Editeurs de Livres also offered a free consulting program

**Egypt:** Offered training courses via social media

**Ghana:** Offered an online training course on eBook publishing in June with plan for a second training program in place

**Germany:** Offered a [checklist](#) for building business resilience

**India:** Held an online conference to discuss the pandemic and best practices in recovery

**Indonesia:** Provided online training on eBook development and sales, online marketing, and partnered with online marketplaces like Tokopedia, Bukulapak, and Google

**Italy:** Offered online training on digitization topics such as digital publishing, e-commerce as well as hosting webinars on applying to government assistance programs to generate revenue, access credit

**Jordan:** Offered online training for members

**Kenya:** Hosted online workshops and meetings aimed at building business resilience

**New Zealand:** Currently seeking funding to support members in developing audiobooks and improving its support for selling digital and print rights to increase exports

**Nigeria:** Offered a webinar on strategic ways members can navigate the pandemic and grow their businesses despite market uncertainty. Offered online training on eBook development, online learning, business digital transformation, and developing audiobooks

**South Africa:** Participated in online courses offered by the African Publisher Network on digital marketing, distribution, and small enterprise development

**Thailand:** Provided training for online sales in preparation for shift the national book fair online

**Turkey:** Hosted virtual meetings on how to survive crises by selling on digital platforms and developing audiobooks

**United Arab Emirates:** Held a virtual [meeting and deployed a survey](#) to understand how COVID-19 is affecting the publishing market and to discuss potential support required from the Association

## Demand-side Ecosystem Cooperation

**Egypt:** Gained the support of the Ministry of Culture's Libraries and the General Authority of Culture Palaces to direct a significant portion of the budget allocated to book purchases to support Association members following the cancellation of Egypt's two major book fairs

**Latin America:** The Mexican Publishers Association led an online regional campaign involving several Latin American publishers associations to promote reading and online book sales.

**Morocco:** Developed a joint reading promotion campaign with booksellers as a display of the resilience of the industry to the pandemic

**New Zealand:** Issued a [statement](#) highlighting the industry's response to supporting COVID-19 recovery including supporting the transition to online learning, providing free licenses to libraries, booksellers, and schools and calling on readers to buy books to support the industry

**Norway:** The Norwegian Publishers Association issued a [joint petition](#) with the Bookseller Association on how publishers can offer access to books during the pandemic

**Philippines:** Partnered with the Book Development Association of the Philippines on resilience strategies for publishers to cut costs, digitize, and diversify revenue

**Russia:** Partnered with booksellers on

a reading promotion program to get readers back into bookstores

**Spain:** Leveraged partnerships with booksellers on a reading and retail promotion campaign [#todoempiezaenunalibrería](#) (everything starts in a bookshop) to call for government support including institutional purchases to provide stimulus, book vouchers, buying books from booksellers, trade support, promotion of Book Day, and piracy assistance

**United Arab Emirates:** Successfully lobbied the Ministry of Culture and youth to establish the [National Creative Relief Program](#) that provided 50 individuals and 37 companies in the creative industries grants ranging from AED 15,000 to AED 50,000

**USA:** Partnered with the Authors Guild and American Booksellers Association to support independent bookstores, encouraging consumers to visit [indiebound.org](#), an online independent book store locator, and contribute to a bookseller assistance fund managed by the Book Industry Charitable Foundation

## Publisher, Educator, and Librarian Cooperation

**Belgium:** The Flemish Publishers Association worked with Dutch-speaking educational publishers to develop a [resource](#) page and open up their digital platform for free to students

**Brazil:** Implemented a crowdfunding campaign

to support booksellers who were not targeted by government assistance programs

**Canada:** Distributed financial assistance to booksellers to support them in paying publishers and writers

- Also worked with Booknet on COVID-19 specific industry research on discoverability, purchase venues, preferences, the ability of independent publishers to target the educational market, and how blended learning might affect educational publishers

- In response to school closures, migration to online learning, and library closures, partnered on the [Read Aloud Canadian Books Program](#) which allowed, on a temporary basis, a waiver of license fees related to reading all or part of select in-print books from participating publishers and authors, and the posting of the video recordings online. 15% of members benefited from the initiative, particularly small publishers, who used the program for accessing skills and as a professional sounding board

**Colombia:** Partnered with booksellers and distributors on the [Yo Leo En Casa](#) (I read at home) social media campaign to promote the book industry

**Denmark:** Educational publishers provided [free access to digital learning](#) materials during the school closures

**Egypt:** Encouraged [government institutional buyers](#) to allocate budgets for purchases as



a form of industry stimulus through government sales. A Library / Association committee will also be set up to promote library sales

- Partnered with the Government on the reading promotion program Stay Home and Read a Book, which offered discounted eBooks, drew participation from 70 publishers and received wide media coverage
- Association members also participated in the General Authority of Cultural Palaces' book fair and the Cultural Ministry's [Stay Home: Culture is Between Your Hands](#) initiative to broadcast cultural programs on state TV channels and social media

**EU:** The Federation of European Publishers worked with booksellers and authors on a social media campaign [#EuropeReadsAtHome](#) to promote reading and book purchases

**Georgia:** Educational publishers provided three months of free access to 6,000 eBooks on the [Saba platform](#), which raised Ministry of Education interest in digital textbooks

- Received financial support from the Ministry of Education, Science, Culture, and Sport to distribute \$150 book vouchers to four libraries as a form of stimulus for publishers
- Partnered with outdoor market and the Tbilisi Children's Festival to provide free space for publishers to sell books

**Germany:** Partnered with logistic company DPD to support bookstores in becoming parcel

shop operators, with My Little Window to offer discounted hygienic products for stores, and with Schafer Shop to provide hygiene products for warehouses, electricity audits for bookstores, discounted auto services

- Provided support resources for booksellers to leverage social media to promote book stores via the A BOOK NOW initiative and linked consumers to an [online book store finder](#)

**Ghana:** Approached institutional buyers, including the Ministry of Education, to purchase old textbooks and supplementary readers from publishers as a form of industry stimulus – with the introduction of a Kindergarten and Primary Curriculum in 4/2019, many publishers were left with old textbook stocks

**India:** Association members released free children's books online, with the National Book Trust also offering more than [100 free books](#) in PDF format online through its [#StayHomeIndiaWithBooks](#) campaign

**Ireland:** [Coordinated](#) with members of Publishing Ireland on how to respond to the pandemic

**Kenya:** Cooperated with the Kenya Institute of Curriculum Development to offer [digital textbooks](#) for free online to enable public schools to transition to online learning

**Mexico:** Partnered with the Association of Booksellers to promote online book sales. Penguin Random House developed the [campaign collateral](#) for International Book Day on 23 April to be used for free by publishers and bookstores

to promote online sales. It was complemented with a list of all [online booksellers](#) on the Caniem website

Joined the Latin America-wide reading promotion [campaign #YoLeoEnCasa](#) to unite publisher Associations in promoting online book sales

**Netherlands:** Educational publishers made [digital learning resources](#) available for free to students and teachers

**Peru:** Created an [online page](#) promoting various initiatives under the [#YoLeoEnCasa](#) campaign and launched the [#SigamosLeyendo](#) (let's keep reading) [campaign](#) to promote reading on International Book Day

**Portugal:** Educational publishers allowed [free access to digital learning](#) materials to more than a million students. The Lisbon City Council also launched the [Lisboa 5L](#) initiative to promote literature, books and bookstores

**Spain:** Partnered with booksellers to promote reading and book purchases from bookstores as part of the [#todoempiezaenunalibrería](#) (everything starts in a bookshop) campaign

**United Kingdom:** Provided links to the [Booksellers Association](#) on the PA website to promote cooperation between publishers and booksellers to increase highstreet book sales

- Also advocated for the reopening of bookstores and developed a summer audio reading list to promote sales of audiobooks

## Proactively Addressing Emerging Industry Challenges

**Canada:** Canadian library associations took advantage of sudden closures and online schooling to call for copyright exceptions during the pandemic. This triggered a response by publishing associations asserting that books can be acquired commercially rather than exercising exceptions for education and teaching

**Jordan:** Called on government to combat piracy and the illegal downloads of textbook which surged during school and university closures

**Mexico:** Launched an awareness campaign to address digital piracy

**South Korea:** Engaged the Ministry of Education on guidelines to prevent textbook piracy, created an awareness campaign on its website, social media, traditional media and the compiled list of incidences of copyright infringement

**Switzerland:** Conducted [webinars](#) on launching eBook businesses for traditional publishers

**United States:** Supported global [call by Chief Science Advisors](#) to make coronavirus research available for free

## Association-led Community Engagement

**Belgium:** Supported members in providing a variety of resources to the public, including platforms that [promote reading for young people](#), a [platform compiling educational material](#) mostly cost-free, and a site providing [laptops for people without access to digital materials](#)

**China:** Association members published and licensed 100 books and articles on COVID-19 which were distributed to 29 countries in 27 languages. This also included lessons from China's early efforts to contain the pandemic.

- Members also provided free COVID-19 resources, including eBooks, audiobooks

**South Korea:** Association members organized a book donation program for COVID-19 patients in which 102 publishers donated 14,000 books to one of the first cities hit by the pandemic

**Association of STM Publishers:** Worked with members to provide free access to scientific articles and research on COVID-19 to assist global vaccine development and research efforts

## List of Contributors and Markets They Represent

COUNTRY	REGION	RESPONDENT	MARKET SIZE	READERS
Argentina	South America	Ana Maria Cabanellas	<a href="#">\$737,000,000</a>	28,544,958
Australia	Oceania	Kathy Bail	<a href="#">\$1,180,000,000</a>	16,272,552
Brazil	South America	Karine Pansa	<a href="#">\$1,960,000,000</a>	136,881,351
China	Eastern Asia	Penyi Li	<a href="#">\$14,900,000,000</a>	957,273,232
Canada	Northern America	Kate Edwards, David Swail, Richard Prieur	<a href="#">\$1,035,700,000</a>	24,749,199
Egypt	Northern Africa	Saeed Abdo, Sherif Bakr	<a href="#">\$189,000,000</a>	43,398,842
France	Western Europe	Catherine Blache	<a href="#">\$2,981,000,000</a>	41,032,877
Germany	Western Europe	Joachim Kaufmann	<a href="#">\$10,500,000,000</a>	
Georgia	Western Asia	Gvantsa Jobava	<a href="#">\$30,000,000</a>	2,390,660
Ghana	West Africa	Asare Yamoah	<a href="#">\$17,000,000</a>	14,306,998
India	Southern Asia	Ramesh Mittal	<a href="#">\$6,700,000,000</a>	677,508,459
Indonesia	Southeastern Asia	Laura Prinsloo	<a href="#">\$466,000,000</a>	175,974,803
Italy	Southern Europe	Giulia Marangoni, Giovanni Hoepli	<a href="#">\$2,493,800,000</a>	38,097,700
Ivory Coast	Western Africa	Anges Félix N'Dakpri	<a href="#">\$22,000,000</a>	6,697,546
Japan	Eastern Asia	Yumiko Hoshiba	<a href="#">\$8,446,000,000</a>	74,282,506
Jordan	Western Asia	Khaled Bilbasi	<a href="#">\$33,000,000</a>	6,191,677
Kenya	Eastern Africa	Lawrence Njagi	<a href="#">\$36,000,000</a>	25,169,209
Mexico	Central America	Roberto Banchik	<a href="#">\$830,000,000</a>	80,472,488
Morocco	Northern Africa	Abdelkader Retnani	<a href="#">\$100,000,000</a>	17,739,949
New Zealand	Oceania	Sam Elworthy	<a href="#">\$292,000,000</a>	3,136,802
Nigeria	Western Africa	Gbadega Adedapo	<a href="#">\$28,000,000</a>	66,746,080
Philippines	Southeastern Asia	Dominador Buhain	<a href="#">\$128,000,000</a>	68,032,315
Russia	Eastern Europe	Vladimir Grigoriev	<a href="#">\$840,000,000</a>	95,406,999
South Africa	Southern Africa	Brian Wafawarowa	<a href="#">\$195,000,000</a>	33,428,741
South Korea	Eastern Asia	Iroo Joo	<a href="#">\$4,962,700,000</a>	36,957,240
Spain	Southern Europe	Patrici Tixis	<a href="#">\$2,700,000,000</a>	30,345,598
Thailand	Southeastern Asia	Trasvin Jittidecharak	<a href="#">\$704,000,000</a>	46,317,723
Turkey	Southern Europe	Ebru Senol	<a href="#">\$1,255,000,000</a>	53,648,227
United Arab Emirates	Western Asia	Rawan Dabbas	<a href="#">\$291,000,000</a>	7,644,626
United Kingdom	Northern Europe	Lis Tribe	<a href="#">\$5,438,100,000</a>	42,211,038
United States	Northern America	Maria Pallante	<a href="#">\$23,338,400,000</a>	212,005,529
Fed of Eur Pubs		Anne Bergman		
Intl Assoc of STM Pubs		Ian Moss		



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