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The Rebound of Independent Bookshops

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I have a PhD and a higher doctorate degree in management. But after a very creative career break as a CEO of an independent bookshop, I am now performing a european based research project about book chain facing radical changes. How do book players adapt themselves to this new context ? how do they compet ? how do they rebound ?

ABSTRACT

The publishing industry has been well described since many years with pioneering research of Coser (1982), Schiffrin (2000) and Thompson (2008). But most of this work is dedicated to the english language publishing industry and it is mainly focused on publishers and their strategy. In this view, digital strategy with the so-called 'ebook revolution' remains an issue particularly sensitive for publishers as some academic papers have stated (Benghozi, 2021 and Thompson, 2021). Digital disruption is always expected : yesterday it was the ebook, tomorrow it could be the audio book. The transformation of the entire book business affects readers, writers, publishers, consumers, distributors, sellers and retailers. In regards to the book retail, changes are affecting the way consumers engage with online sellers, big corporations and local bookstores.

Book selling can be considered as a blind spot of the research agenda about book industry. This is this gap we would like to fill in, furthermore in an european based approach. Not only we will investigate each country, but we will also build a useful comparative tool so as to underline differences and impact.

COVID crisis appears to reveal, as a photographic process, what is ongoing with book selling change. While the online selling revolution has announced since many years, impact of the pandemic were very different to one country to another. COVID is in fact a relevant window into depicting the silent revolution that is occurring with bookstores. This resurgence could have been accelerated by the crisis. Yet, we should be carefull to the european comparison for two reasons. First, what constitutes a bookshop can differ from a country to another, and this depends on the social imaginary of reading and book. Second, measures taken during the COVID crisis (lockdown, curfew) have not been the same and did not last the same amount of time in different countries. So it could be seful to connect data and specific COVID measures.

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This research is performed with an european based view. Several book chains will be compared to each other so as to identify key findings. At this stage, we are now collecting data and material from five countries (UK, France, Italy, Germany and Sweden) that have been chosen for their characteristics and differences (reading habits, price system, type of public regulation, type of sales between paper, ebook and audio, market share of online sellers and brick-and-mortar stores, impact of COVID crisis). Material collected is based on national statistics, interviews of key players and analyse of professional newspapers. Actually, this work is currently in progress but we will have an overview of the findings next spring.

I must also complete this methodological presentation by the fact that the author has been a bookseller in one the country studied. Based on organizationnal ethnography, this material is colourful, detailed and deeply embedded in the inside of bookshops. This leads us to a clear understanding of situations, strategies, bargainings and shades.

The paper will deliver five per-country close-up depicting the impact of the OVID crisis on the entire book chain and specially on market shares of sellers (online and retailers). Each dimension of the comparative tool will be described for all the five countries (cf. *preliminary findings in the following table*).

	Italy	UK	Germany	Sweden	France
Population and GDP per capita	60 m 27 900 / cap.	68 m 35 500€ / cap.	83 m 40 210€ / cap.	10 m 42 700 / cap.	65 m 34 100 / cap.
Reading hours / week	5h36	5h18	5h42	6h54	6h54
Public regulation	Regulated in 2020 A recent public concern	Agreement broken in 1995 in favor of liberal and free price system	Fixed price system since 1888	Very liberal system Free price since 1976	Regulated system High level of public policy Fixed price since 1981
Publishers	Highly concentrated	Highly polarized	Publishers concentration	Three main publishers	Fringed oligopoly
New releases			70 000	7 500	68 000
Book sales trend	Ebook increasing	Ebook slow down Audio great potential	Ebook market stable	Audiobook 21%	Market is up Specially for ebook (8%)
Sellers market shares before pandemic	Bookshops 47% but decreasing Online 25% Big box 28%	Bookshops 42% Online 32%	Bookshops 50% but slowly decreasing Direct sales 21% Online 17%	Bookshops 27% Online 22% Audio 18% Supermarkets 15%	Bookshops 40% Cultural stores 34% Online 17% Supermakets 7%
Impact of the COVID crisis	Market increased Bookshops 33% Online 47% More inequalities	Market increased Bookshops surge Big boxes suffered Online increased Shortage issue	Reading increase despite market decreased Ebook increased Bookshops 42% Online 20%	Market increase specially audiobooks Online 51% Audio 24% Bookshops 20%	Reading decrease Market quite stable Bookshops resurgence Shortage issue

One preliminary result we are already describing is the rebound of independent bookshops. This revival depends on key factors we will identify but we can state that they are both economic and cultural (legal system for instance, social imaginary of reading and bookshop for example). Furthermore, this resurgence also depends on answers independent bookstores have enhanced. These key factors can be summarized in a « triangle of success » we will depict : innovation, back to basics and collective action. We can observe these three leverage while bookshops are competing and resurging against online and big corporations.

KEYWORDS

publishing industry, book market, international comparison, strategic management, COVID impact
My paper could be inserted either in book topic tracks or in organizationnal strategic concern.