

The Global Publishing Industry in 2020 – the Impact of COVID-19

*Preliminary release**

The spread of the COVID-19 pandemic in 2020 upended life as we knew it in a matter of weeks. It had a profound impact on the way we work, travel, shop, communicate and find entertainment. The forces unleashed by the pandemic invariably shaped the global publishing industry in 2020. Yet how exactly? WIPO's global survey of publishing activity offers a preliminary window into how the industry fared during the crisis year 2020.

Mixed crisis impact on revenue

The 2020 total sales and licensing revenue data covering the trade and the educational sectors are available for 21 countries. In addition, two countries provided revenue data for the trade sector. These 23 countries generated a combined revenue of USD 64.4 billion in 2020. The United States of America (U.S.) (USD 23.6 billion) reported the largest sales revenue, followed by Japan (USD 10.8 billion), Germany (USD 10.6 billion), the United Kingdom (U.K.) (USD 4.8 billion) and Italy (USD 3.5 billion) (table 1).

A considerable number of countries registered revenue declines in 2020 when compared to 2019. For example, revenue fell by 31.6% in Turkey, 18.2% in Brazil, 7.3% in Sweden, 5.6% in Colombia and 2.2% in Ireland.¹ The pandemic heavily affected these countries in 2020, though it is not clear how much of the falling revenue can be attributed to the COVID-19 crisis.² The U.S. – also heavily affected – registered modest revenue growth of 0.9%. In addition, several countries saw continued revenue growth in 2020 – notably Japan (+10.7%), Italy (+8.6%), Norway (+4.2%), Finland (+3.8%), New Zealand (+2.5%) and the United Kingdom (U.K.) (+2.0%).³ Again, it remains open to what extent these growth figures reflect in one way or another by the pandemic's influence.

Trade sector revenue accounted for 50% or more of total revenue for 15 of the 19 countries for which data by sector are available – ranging from 53.5% in Italy to 90.7% in Japan. Educational sector revenue accounted for over half of total revenue in Brazil (63.9%), Netherlands (62.6%), Spain (57.9%) and Turkey (52.3%).

* More complete survey results will be available in WIPO's forthcoming World Intellectual Property Indicators 2021 report.

¹ In the case of Sweden, the percentage change refers to the trade sector only.

² Exchange rate movements fully or partly explain the revenue declines in Turkey, Brazil and Colombia.

³ In the case of Italy and Japan, percentage changes refer to the trade sector only. For the United Kingdom, the growth rate covers a broader set of publishing activity than in the WIPO survey and was taken from the [U.K. Publishers Association press release](#).

Increasing share of sales online

Revenue data by sales channel – brick and mortar, online and others – are available for 13 countries for 2020. Online sales generated more than two-thirds of total publishing industry revenue in the U.K. (68.6%) in 2020. Brazil (38.7%), Malta (37.8%), Sweden (38%), Turkey (44.1%) and the U.S. (37.3%) also had a large proportion of their total trade sector revenue generated by online sales. However, the brick and mortar channel continues to generate the bulk of total trade sector revenue in Spain (79.2%), Italy (62.9%) and New Zealand (61.2%).

Direct comparisons with 2019 are only possible for a few countries. They all point to an increase in the share of online sales – by 6.6 percentage points for the US, 7.3 percentage points for Norway, 13.4 percentage points for the U.K. and by 43 percentage points for Turkey. While these share increases reflect a longer-term trend, the pandemic's containment measures likely accelerated this trend and may have changed consumer purchasing habits in a permanent way.

Mostly declines in the number of titles published

Data on the total number of titles published in 2020 covering both the trade and the educational sectors are available for 31 countries. The U.K. reported a combined total of around 186,000 published titles in 2020. Italy (125,948), France (97,327), Turkey (88,975) and Spain (83,622) round out the top five countries (table 1).

For 27 countries, it is possible to compare figures for 2019 and 2020. Two-thirds of them registered declines in the number of titles published and one-third registered increases. Four of the top 5 countries reported fewer number of titles published in 2020 compared to 2019. Spain (–12.8%) recorded the steepest decline, followed by France (–9.2%), the U.K. (–7.9%) and Turkey (–5.8%). Italy saw 25.6% growth.

Rising share of digital editions

In total, 21 countries reported data on the number of titles published by format (print, digital and audio). The share of digital editions ranged from 5.1% for the Republic of Moldova to 57.3% for Sweden. Other Nordic countries also show high shares, notably 45.1% for Finland, 48.8% for Iceland and 51.5% for Norway.

For 11 countries, it is possible to compare the share of digital editions in 2019 and 2020. Except for Turkey (-2.2 percentage points), all countries saw the share increase, often substantially so. For example, the share increased by 21.4 percentage points in Chile, 20.1 percentage points in Ecuador, 10.0 percentage points in Finland and 19.3 percentage points in Iceland, and 24.3 in Malta. In most countries, the driving force behind these share increases is a decline in the number of print editions, coupled with a smaller decline or even an increase in the number of digital editions. The greater prominence of digital editions likely reflects how the pandemic has affected both the demand and the supply of published works. Again, the pandemic has likely accelerated an ongoing shift in the industry.

Publishing industry survey

WIPO's survey of the global publishing industry was established in collaboration with the International Publishers Association (IPA) in 2017. In addition, WIPO has strengthened cooperation with the Federation of European Publishers (FEP) and Centro Regional para el Fomento del Libro en América Latina y el Caribe (CERLALC) to reduce the burden on respondents and increase the geographical coverage of survey responses. This year, FEP compiled data for 15 European countries (FEP members) and shared with WIPO. In addition, CERLALC provided data for few countries of the Latin America and the Caribbean region (LAC). WIPO is grateful to CERLALC and FEP for sharing their data.

The scope of the publishing industry survey is limited to (a) the trade and educational sectors, and (b) published materials (i.e., books, monographs, etc.) issued with an ISBN, a Digital Object Identifier (DOI) or any other book identifier. Every effort has been made to compile statistics based on the same definitions and to facilitate international comparability. However, caution should be exercised when interpreting the data due to data being incomplete and partial. For example, a number of countries provided revenue and/or titles published for print format only – i.e., digital components is missing. Similarly, for few countries reported revenue data at market value at retail prices, rather than net revenue. Furthermore, for most countries, the respondents are national publishers' associations (NPAs). The share of the total publishing industry represented by national publishers' associations (NPAs) varies between countries.

Table 1. Total number of titles published and revenue from sales and licenses, covering the trade and educational sectors, 2020 (or the latest available year)

Country	Number of titles published			Country	Total publishing industry revenue USD million		
	Total	Share of total (%)			Total	Share of total (%)	
		Trade	Educational			Trade	Educational
Argentina *	11,514	82.8	17.2	Argentina *	..	..	..
Australia	19,241	..	..	Australia	..	..	..
Austria	8,711	89.5	10.5	Austria	374.8	83.8	16.2
Azerbaijan (a)	..	..	..	Azerbaijan (a)	25.7	..	..
Belarus (b)	8,205	47.1	52.9	Belarus (b)	..	..	..
Brazil (b)	46,083	57.0	43.0	Brazil	1,022.7	36.7	63.3
Bulgaria *	12,194	85.3	14.7	Bulgaria *	..	..	..
Chile	7,058	86.2	13.8	Chile	..	..	..
Colombia *	19,996	..	..	Colombia *	243.5	..	..
Croatia * (a)	6,721	..	..	Croatia * (a)	..	..	..
Cuba	728	87.2	12.8	Cuba	..	..	..
Czech Republic *	16,305	95.1	4.9	Czech Republic *	296.0	94.8	5.2
Denmark	10,715	..	..	Denmark	326.7	71.3	28.7
Ecuador	4,153	55.8	44.2	Ecuador	..	..	..
Estonia	5,809	91.3	8.7	Estonia * (b)	41.2	81.5	18.5
Finland	10,208	78.8	21.2	Finland	283.3	59.7	40.3
France (b)	97,327	73.7	26.3	France	2,977.2	69.1	30.9
Georgia (a, b)	1,542	..	..	Georgia (a)	6.2	..	..
Germany (b)	77,272	..	..	Germany	10,625.9	..	..
Greece	9,583	66.8	33.2	Greece	..	..	..
Hungary *	9,589	74.6	25.4	Hungary *	180.4	92.8	7.2
Iceland (a)	2,764	..	..	Iceland	28.2	..	..
Ireland	1,773	64.9	35.1	Ireland (b)	36.3	65.7	34.3
Italy	125,948	77.6	22.4	Italy	3,490.6	53.5	46.5
Japan (b)	69,850	98.2	1.8	Japan	10,824.5	90.7	9.3
Kazakhstan * (a, b)	4,447	..	..	Kazakhstan * (a, b)	..	..	..
Kyrgyzstan (b)	1,206	78.8	21.2	Kyrgyzstan	..	..	..
Latvia	2,375	92.3	7.7	Latvia	..	..	..
Lebanon	2,000	..	..	Lebanon	..	..	..
Lithuania *	3,479	92.0	8.0	Lithuania *	..	..	..
Mali *	119	74.8	25.2	Mali *	1.5	66.2	33.8
Malta	511	83.4	16.6	Malta	3.9	65.4	34.6
Mexico	18,713	49.2	50.8	Mexico *	535.0	25.8	74.2
Myanmar	6,099	84.5	15.5	Myanmar	..	..	..

Netherlands	..	..	..	Netherlands	913.7	37.4	62.6
New Zealand (b)	2,526	24.8	75.2	New Zealand	116.9	80.3	19.7
Norway	14,114	82.4	17.6	Norway	291.2	57.1	42.9
Peru	6,885	82.8	17.2	Peru	..	..	..
Poland *	22,939	92.4	7.6	Poland *	435.7	65.0	35.0
Portugal	18,925	..	..	Portugal	258.1	64.6	35.4
Republic of Korea * (a)	65,432	..	..	Republic of Korea *	6,225.3	60.6	39.4
Republic of Moldova	4,559	57.8	42.2	Republic of Moldova	..	..	..
Russian Federation *	115,171	..	..	Russian Federation *	..	..	..
Serbia	14,901	83.0	17.0	Serbia	..	..	..
Slovenia *	5,076	85.2	14.8	Slovenia *	96.3	76.7	23.3
Spain	83,622	..	..	Spain	2,786.9	..	..
Sweden (a)	8,227	..	..	Sweden	327.0	64.8	35.2
Thailand (a)	9,710	..	..	Thailand (a, b)	431.4	..	..
Togo *	43	79.1	20.9	Togo	..	..	..
Turkey	88,975	75.1	24.9	Turkey	923.5	47.7	52.3
U.K.	186,000	..	..	U.K.	4,755.1	57.5	42.5
U.S.	..	..	..	U.S.	23,614.3	70.6	29.4
Ukraine	18,967	68.1	31.9	Ukraine	..	..	..

(a) Trade sector only.

(b) print format only.

.. not available.

* 2019 data

Source: WIPO Statistics Database and Federation of European Publishers (FEP), October 2021.