



FLANDERS MARKET INSIGHTS

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A. Methodology

Market monitor Flanders

GENERAL TRADE MARKET

- Collaboration between Boek.be, GAU & GFK Belgium
- Monitoring of end consumer sales with 89% coverage

EDUCATIONAL, ACADEMIC, SCIENTIFIC & PROFESSIONAL MARKET

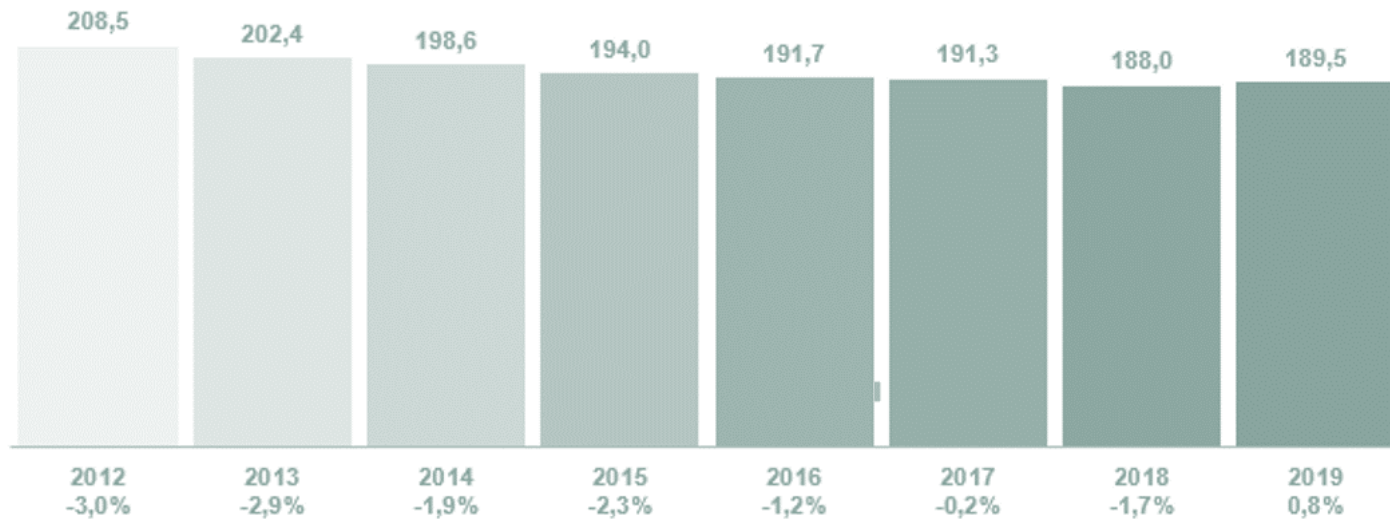
- Collaboration between GEWU & Haystack Belgium
- Member survey on a yearly basis

MEASURING CORONA IMPACT

- Two impact surveys sent to booksellers and publishers
- GFK Statistics YTD-August 2020

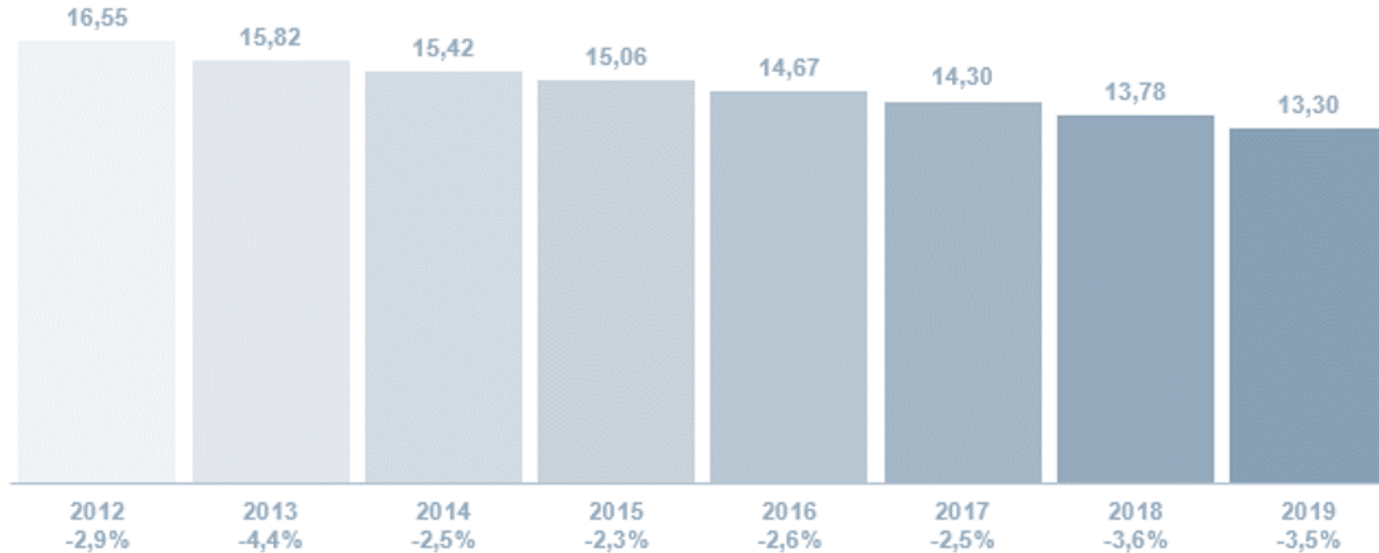
B. Statistics 2019: general overview

2012-2019: Value %



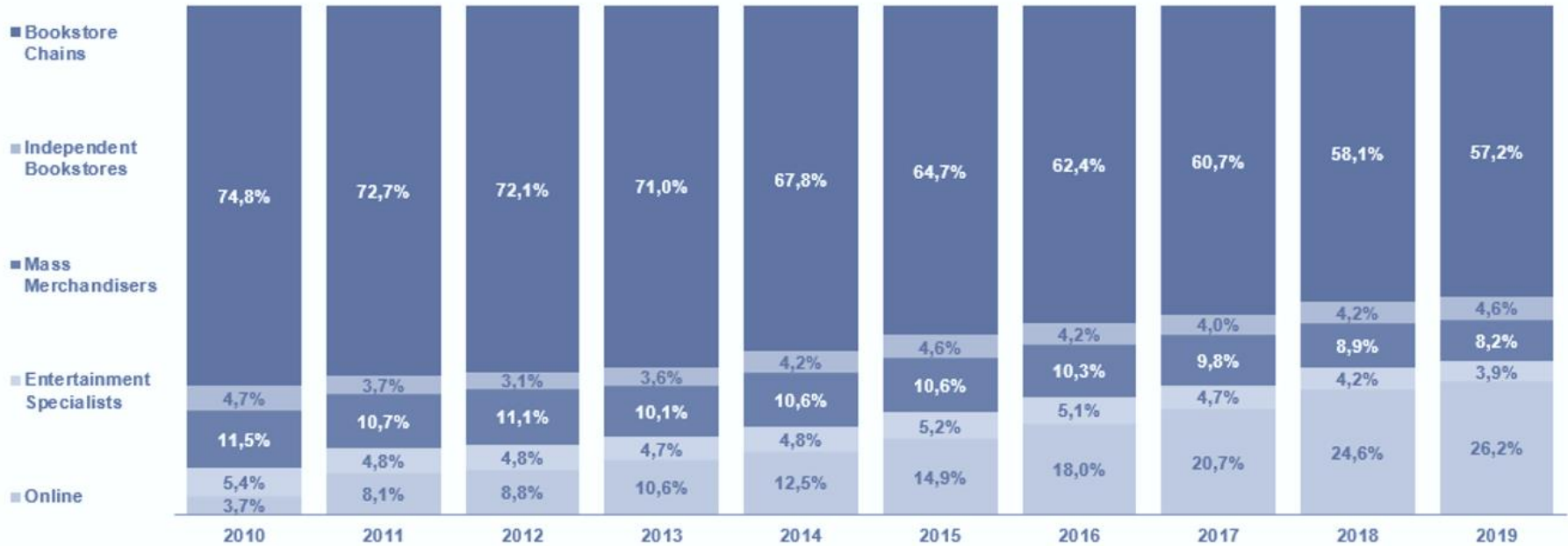
Source: GfK Belgium

2012-2019: Unit %

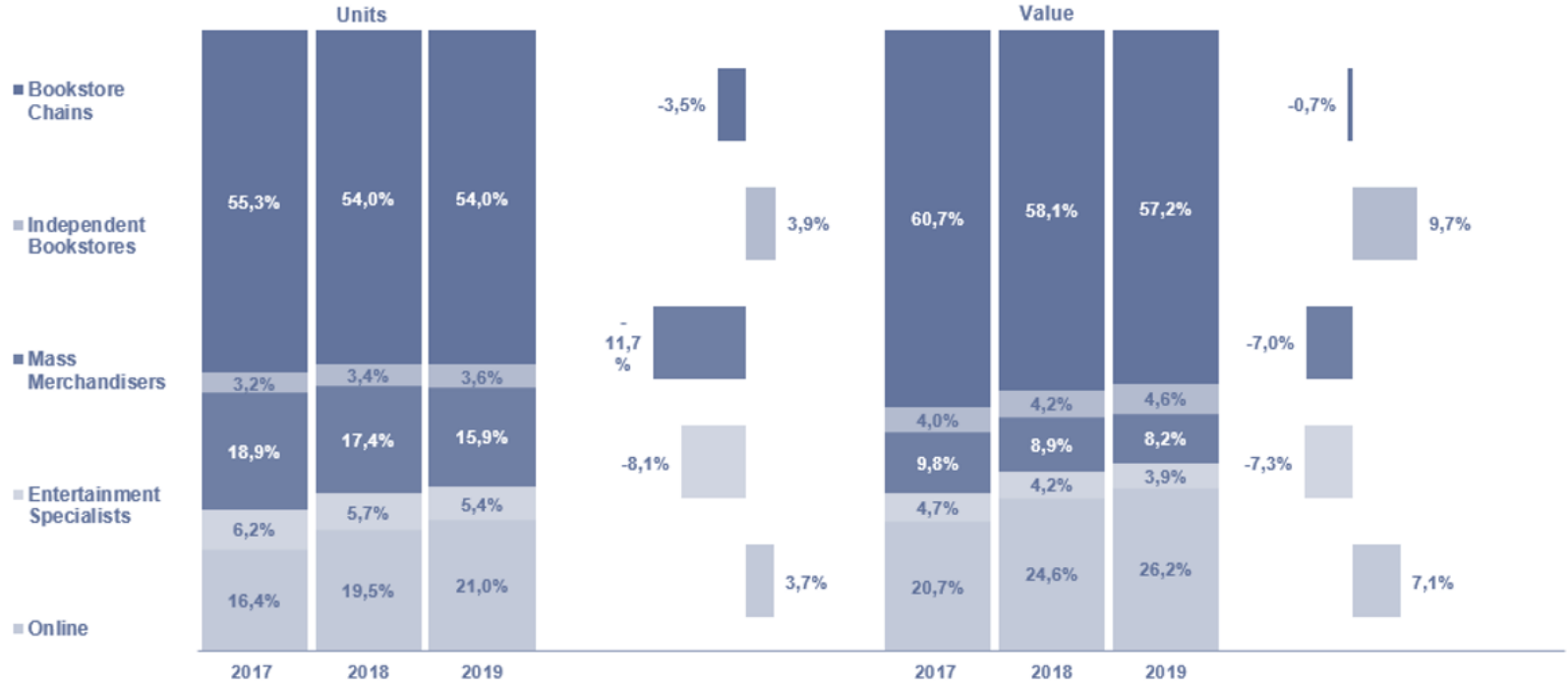


Source: GfK Belgium

Distribution channels (based on value)



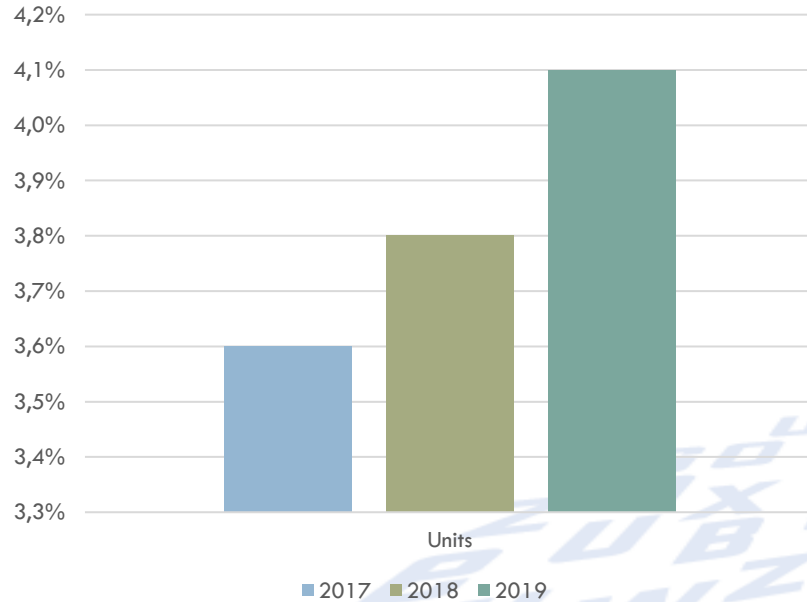
Distribution channels: units vs value



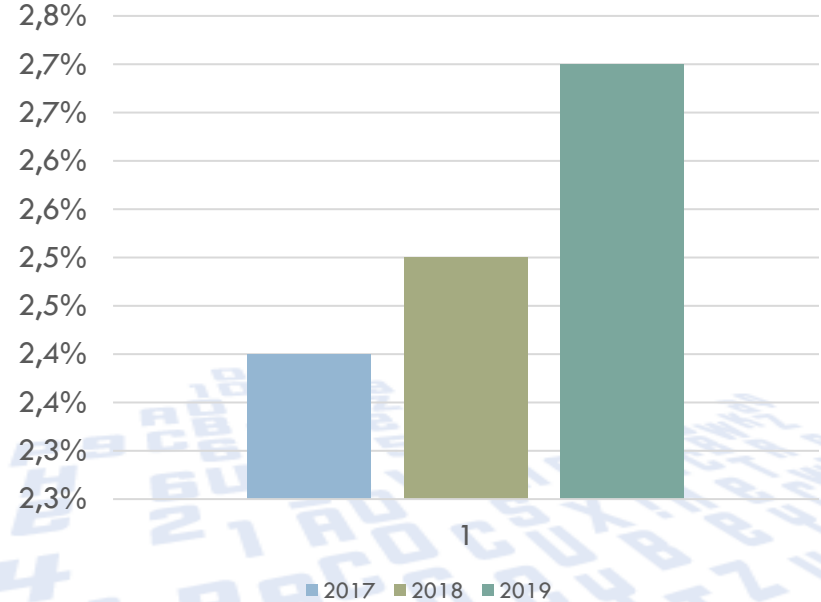
Source: GFK Belgium

E-book market trends

Units

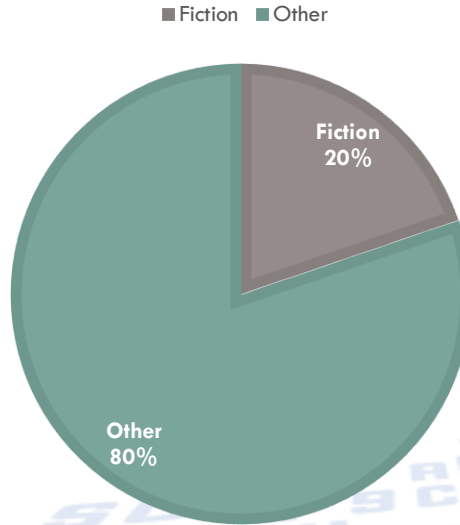


Value

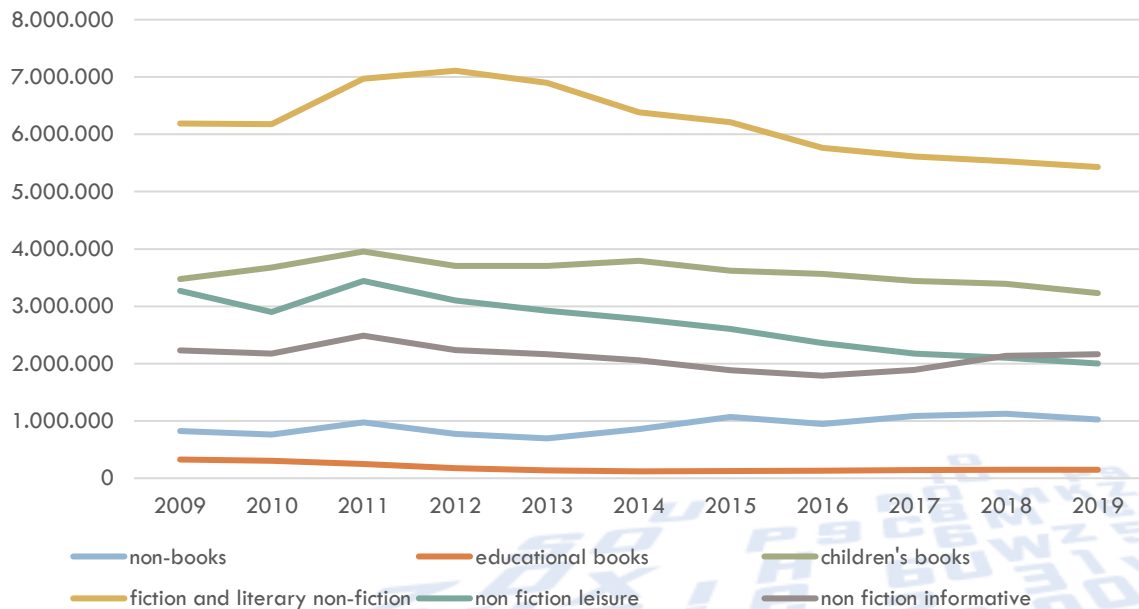


Source: GfK Belgium

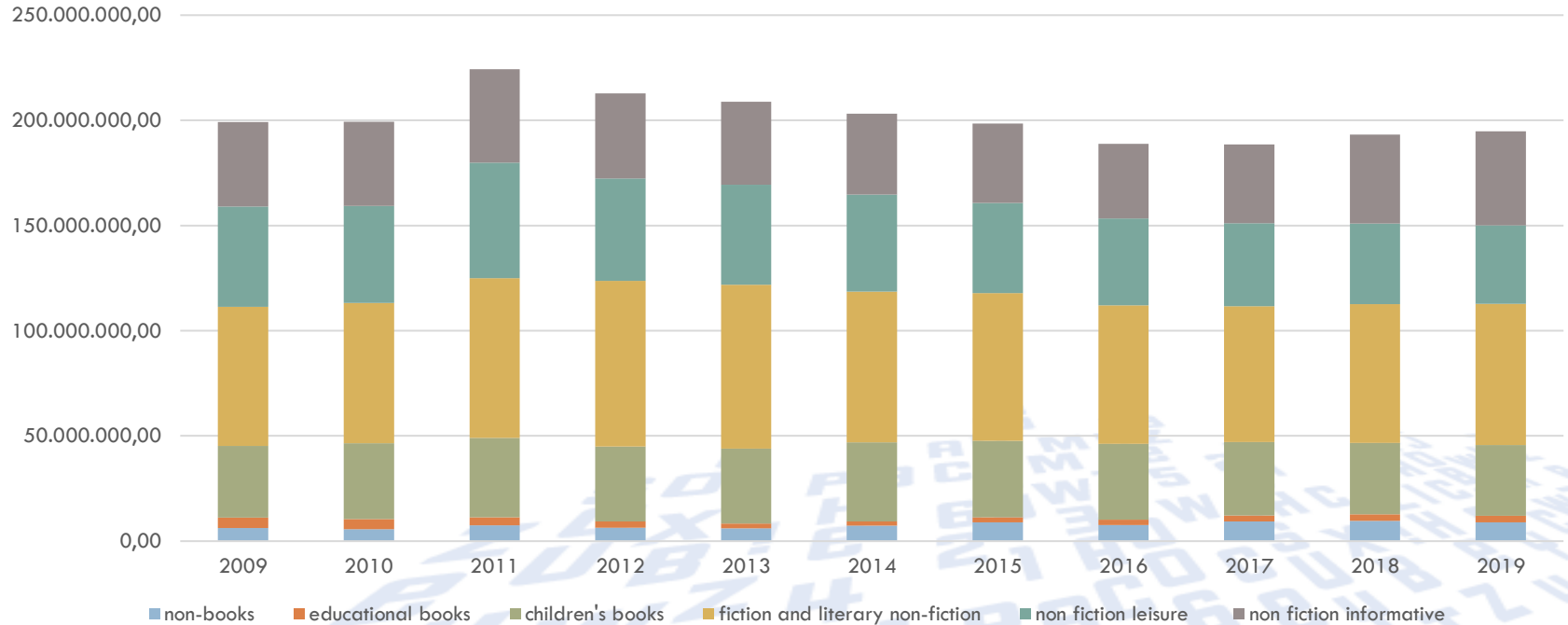
E-book market trends



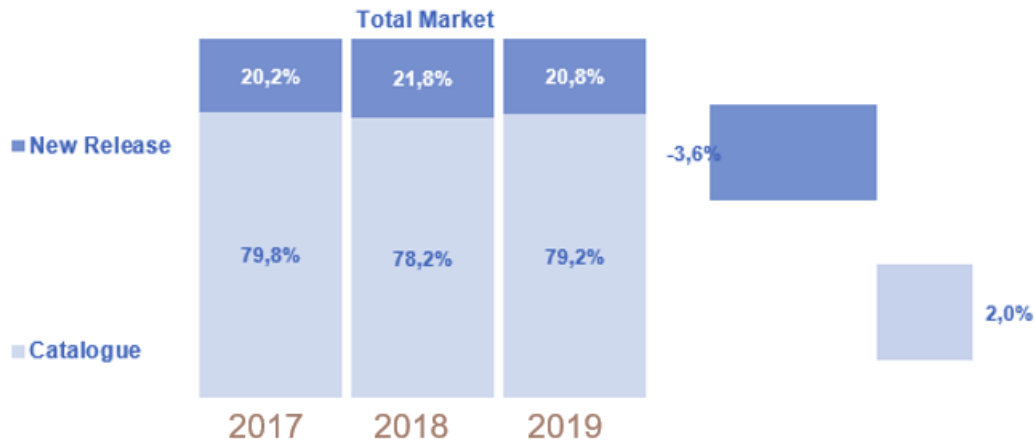
Trends in genres: units sold



Trends in genres: turnover



New release (6 months) vs. backlist



C. The impact of Covid-19

Measuring the impact of Corona



Measuring the impact of Corona

- 2 impact surveys sent to booksellers and publishers (March – May)
- Impact on title production: 475 titles postponed, 45 cancelled
- Estimation total loss of sales trade market: between 31 and 46 million euros
- 20% of respondents stated there is a real risk of their business going bankrupt
- 10% of the respondents feared they will have to lay off staff in the long term
- Collection, home delivery, ordering by telephone or social media (each \pm 15%)
- Sales via webshops bookstores and publishers (+ 30%)
- Use of government measures: temporary unemployment (60%), hinder compensation (40%) and the payment plan tax on earned income (25%).

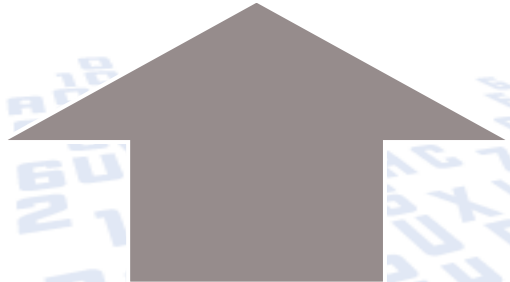
Unit and value YTD - August



Units (-0,7%)



Value +4,5%



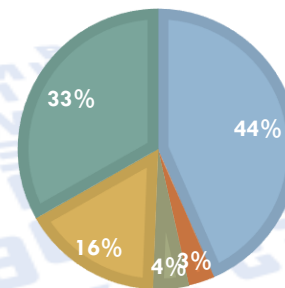
Source: GFK Belgium

Distribution channels YTD - August

Distribution channels	Turnover	Market share	Units	Market share
Book chain stores	-18,3%	44,9%	-19,80%	43,50%
Independent bookstores	-9,8%	3,8%	-17,30%	3%
Entertainment stores	-19,3%	2,9%	-22,10%	4,10%
Supermarkets	3,3%	8,3%	-5%	16,20%
Online sales	61,3%	40,0%	61,90%	33,20%

MARKET SHARE

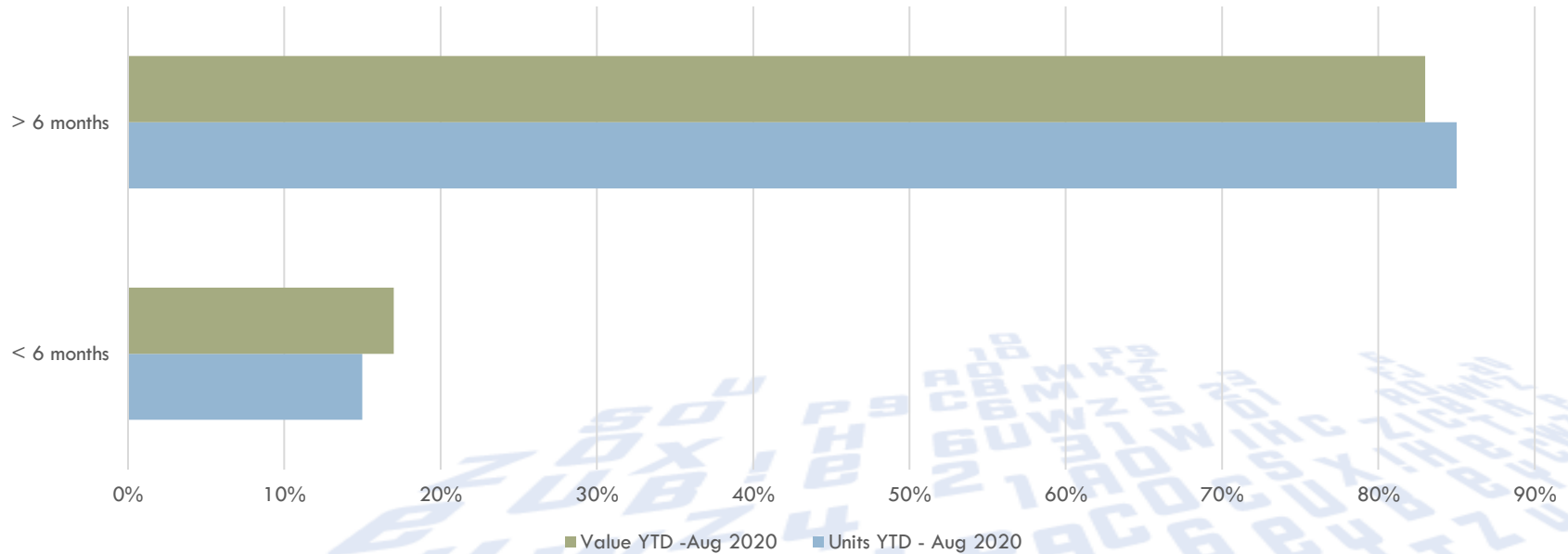
■ Book chain stores
 ■ Independent bookstores
 ■ Entertainment stores
■ Supermarkets
 ■ Online sales



Source: GFK Belgium

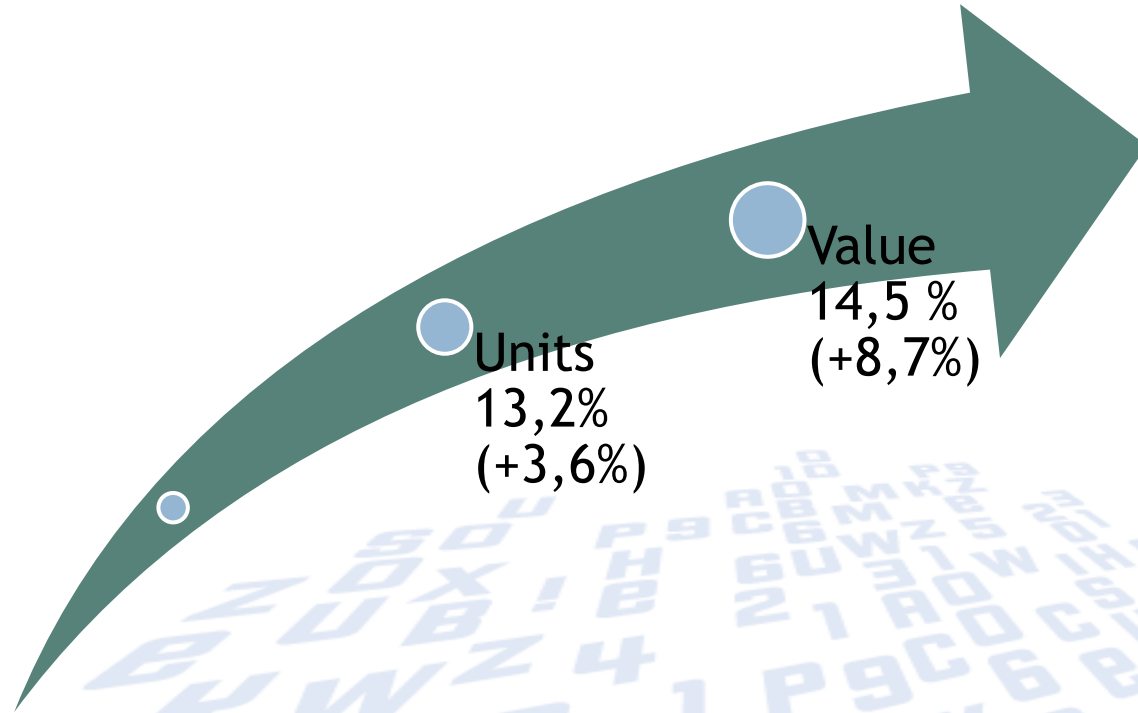
Genres YTD June: new release vs backlist

Market share YTD -Aug 2020



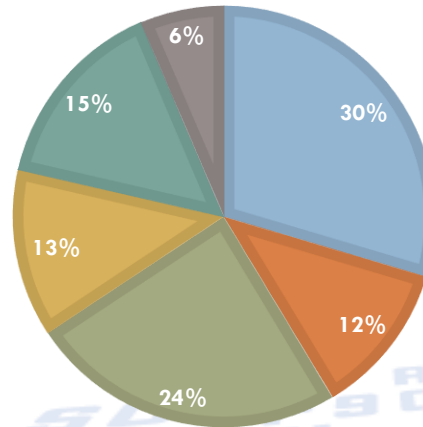
Source: GFK Belgium

Market share Top 100 YTD -Aug



Trends in genres YTD-Aug 2020

■ Fiction ■ Comic books ■ Children's books
■ Non-fiction leisure ■ Non-fiction informative ■ Non-books



Source: GFK Belgium

Corona impact on reading



According to a study conducted by the research group TOR of the University of Brussels (VUB) 82% of the participants read more frequently (6h/week) during lock-down.

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