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The Virus in the Bookshop: How Has The Pandemic Affected Istanbul's Publishing Industry?

Kitapçıdaki Virüs: Pandemi İstanbul'un Yayıncılık Sektörünü Nasıl Etkiledi?

Abstract

The COVID-19 pandemic has had a significant impact on the publishing industry in Istanbul, with both positive and negative sides. It has accelerated the trend towards digitalisation and has led to significant economic gains for some actors in the industry, such as digital platforms. However, this has also caused serious losses for other actors, particularly small and independent businesses that rely on their physical presence in the workplace. Closure measures and disruptions in economic activity have caused dramatic drops in sales and revenue for these businesses, leading to financial difficulties and job losses. To understand the professional experiences of stakeholders in Istanbul's publishing industry during the pandemic, 13 interviews were conducted between May and October 2022, identifying two main components of the industry: publishers and bookstores. The interviews suggest that the pandemic has a markedly negative effect on booksellers, further accelerating existing trends towards digitalisation and monopoly. This paper concludes with a discussion of the findings and implications of this study for future research.

Keywords: COVID-19 Pandemic, Creative Industries, Publishing, Digitalisation, Istanbul

Öz

COVID-19 pandemisinin İstanbul'daki yayıncılık sektörü üzerinde hem olumlu hem de olumsuz etkileri oldu. Salgın sektördeki dijitalleşme eğilimini hızlandırırken, çevrimiçi satış platformları pazardaki konumlarını güçlendirdiler. Ancak aynı dönemde faaliyetleri işyerinde fiziksel olarak bulunmalarını gerektiren küçük işletmeler süreçten çok zarar gördüler. Kapanma tedbirleri ve ekonomik faaliyetlerdeki aksamalar, bu işletmelerin

Özgür SAYIN

Dr. Öğr. Üyesi.
Bilecik Şeyh Edebali Üniversitesi,
Osmaneli Meslek Yüksekokulu,
Bilecik, Türkiye.
ozgur.sayin@bilecik.edu.tr
ORCID : 0000-0003-2111-6152

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faaliyet gelirlerinin neredeyse sıfırlanmasına neden oldu. Pandeminin işgücü cephesi üzerinde de önemli bir etkisi oldu ve kayıpların önemli bir kısmını kayıt dışı ve serbest çalışanlar üstlendi. Bu çalışma İstanbul yayıncılık sektöründeki paydaşların pandemi sürecindeki mesleki deneyimlerini anlamak amacıyla nitel bir vaka çalışması olarak tasarlanmıştır. Saha çalışması Mayıs ve Ekim 2022 tarihleri arasında yapılmış ve sektörün iki ana bileşeni olan yayıncılar ve kitabevleri ile toplamda 13 mülakat gerçekleştirilmiştir. Görüşmeler, pandeminin kitapçılar üzerinde belirgin bir olumsuz etki yarattığını, dijitalleşme ve tekelleşme yönündeki mevcut eğilimleri daha da hızlandırdığını gösteriyor. Makale, bulguların tartışılması ve çalışmanın gelecekteki araştırmalar için çıkarımlarıyla son bulmaktadır.

Anahtar Kelimeler: KOVID-19 Pandemi, Yaratıcı Endüstriler, Yayıncılık, Dijitalleşme, İstanbul

Introduction

> *"Within every crisis, there is opportunity. The COVID-19 pandemic has been a catalyst for many changes around the world, both positive and challenging, but the survival of institutions will depend on how they can weather this emergency situation (Vecco et al., 2022, p. 47)."*

The COVID-19 pandemic has significantly impacted the global creative economy, which had experienced remarkable growth in the few decades prior to the pandemic (UNCTAD, 2022). In the first year of the pandemic-related crisis, over 10 million people lost their jobs and $750 billion was wiped out, which was higher than the GDP of countries outside the G-20 (Naylor, Todd, Moretto, and Traverso, 2021). However, the crisis had varying implications for different industry segments (Gnezdova, Osipov, and Hriptulov, 2022; Gouvea, Padovani, and Gutierrez, 2023; Khlystova, Kalyuzhnova, and Belitski, 2022). Sectors such as cinema, theatre, and music have suffered substantial losses due to the suspension of community activities (Haapakorpi, Leinonen, and Otonkorpi-Lehtoranta, 2022; Zhang, Ji, Pang, and Suo, 2022). However, digital streaming platforms and gaming industry have shown a remarkable growth (Ryu and Cho, 2022; Snowball and Gouws, 2023; Vlassis, 2021).

The crisis/opportunity dilemma was particularly marked in the publishing industry due to its multi-component nature, including a combination of high-value service jobs and labour-intensive operations, digitally flexible platforms and traditional businesses, and publishing cartels and independent small businesses (Rivas-García and Magadán-Díaz, 2022). The pandemic did not have a devastating impact on those in the first groups (high- qualified service, digital platforms, and publishing chains), whereas small businesses with less financial and technological flexibility and relying on physical presence in the workplace have been seriously damaged, particularly by curfews and remote working orders (Guren, McIlroy, and Sieck, 2021).

Although there were interesting variations in the influence of the pandemic on the industry stemming from these differences, few studies have been conducted on its effects on the publishing sector. This is likely due to the publishing industry's relatively modest economic impact compared to other major creative industries. Nevertheless, existing research already suggests that individual experiences of the pandemic have been strongly influenced by these conflicts, resulting in similar experiences across regions. On the other hand, variations in experiences between countries have also been observed due to differences in market structure and size (Kovač and Gudinavičius, 2021), technological and financial capabilities (Brinton, 2021; Done, Warner, and Noorda, 2022), institutional structure (Guren et al., 2021; Reid and Mrva-Montoya, 2022), and government support (Zhang et al., 2022).

While existing research offers some insight into pandemic industries on a global and national scale, it also suggests that strategies and solutions depend on the individual experiences of stakeholders in the industry. Therefore, more empirical research is needed to develop a nuanced understanding of how pandemics manifest in local markets. This study aims to understand the professional experiences of stakeholders in Istanbul's publishing industry during the pandemic. Istanbul was chosen as a case study due to its status as the economic and cultural capital, as well as the leading centre of the national publishing industry in Turkey, which is among the leading countries in the publishing industry in terms of both net income and number of titles (Magadán-Díaz and Rivas-García, 2022). Therefore, this research extends the empirical map of wider research by including experiences from the city and country, contributing to a generalisable knowledge construction in a bottom-up manner.

This research was designed as a qualitative case study, and the main data source was semi- structured interviews with three main groups of stakeholders (publishers, booksellers, and trade organisations) with different institutional characteristics. The fieldwork was conducted between May and October 2022 at three specific locations in the city, and 13 interviews were conducted in total. The results suggest that the pandemic has a markedly negative effect on boutique booksellers and small-scale, independent publishers, further accelerating existing trends towards digitalisation and monopoly.

The remainder of this paper begins with a concise review of relevant literature, followed by an explanation of the methods and study designs employed in this research. The main empirical section of this study presents research insights as three headings: impacts, strategies and expectations. The paper concludes with a discussion of the findings.

Background: The Pandemic and Publishing Industry

The pandemic has suddenly and severely struck the world. As the scale of risk became apparent, governments took immediate and drastic measures to control the rapid spread of the virus (Betzler et al. 2021; Capano et al. 2020). Nationwide, curfews have been imposed in many countries, and remote working and online education have been introduced. Community and cultural events, festivals, and trade fairs have been canceled or moved online (Estanyol, 2022; Vallejo and Taillibert, 2023). With a few exceptions, businesses and institutions were forced to shut down or operate at a reduced capacity, and global trade in goods and services was almost halted (Xu, Elomri, Kerbache, and El Omri, 2020).

During the early stages of the pandemic, the implementation of these measures resulted in significant decreases in production, sales, and revenue. Within the first few months, book sales through traditional retail channels have dropped to almost zero in several countries (EWC, 2022; FEP, 2020; IPA, 2020). Losses were initially greater in larger countries than in smaller markets (Kovač and Gudinavičius, 2021), but the sector recovered after the first shock and losses were broadly offset overall (Guren et al., 2021). The reality is that the pandemic has not had a serious negative impact on the annual sales of print books around the world (Curcic, 2023), with significant increases in many key markets, such as China (Ren and Kang, 2021), the US (NPD, 2021), and the UK (Flood, 2021). Despite the overall positive picture, there were winners and losers with marked differences between large and small publishers, physical and online retailers, and publishers and bookstores:

> *"Large, multinational publishers reported having to delay the production of some titles, but overall did well in book sales, thanks to titles distributed via discount department stores, chains and online retailers. In contrast, independent publishers, reliant on*

> *distribution via independent bookshops, reported a significant impact of the COVID-19 lockdown on sales (Reid and Mrva-Montoya, 2022, p. 546)."*

In addition to the sharp drop in sales, pandemic publishing has also suffered from disruptions in global logistics and supply chains. This has resulted in the scarcity of raw materials in the paper and pulp industries. Paper costs have skyrocketed, and black markets, informal trading, and stockpiling have increased (Brinton, 2021; Done et al., 2022). To cope with these difficulties, companies have adopted new solutions to reduce production costs and marketing strategies to maintain sales (Done et al., 2022; IPA, 2020; Spjeldnæs, 2022).

The number of books printed was reduced in general, with new titles postponed, and popular titles and authors prioritised in new prints (Ren and Kang, 2021). While a noticeable upsurge has been recorded in the release of children's books, fiction and classics, niche, and less popular genres and topics has been pushed into the second plan (Guren et al., 2021). In market reports, 20,000 new titles and 50 million copies of printed books were postponed or canceled throughout Europe in the first year of the pandemic, many of which belonged to young and less-established authors (EWC, 2022; FEP, 2020).

New production and delivery methods have been adopted to reduce costs. Print-on-demand technology, which reduces printing costs and paper dependency, has become prevalent (Gallagher, 2014). Subscription, lending options, and new delivery methods, such as click-and- collect and click-and-deliver, have also been developed for both digital and printed books (IPA, 2020; Magadán-Díaz and Rivas-García, 2020). More importantly, digital products such as chatbooks, e-books, and audiobooks have become low-cost alternatives for both publishers and readers, and have gained a particular popularity, though still much behind printed books(Brinton, 2021; Rivas-García and Magadán-Díaz, 2022).

Overall, large companies have been less damaged by these upheavals for several reasons: they had strong financial capabilities, lobbying, and bargaining powers, so they were more capable of managing disruptions and price fluctuations; they were less reliant on physical book production, so they were more successful in product diversification; and more importantly, they had a more diverse physical and online sales network so that they could maintain their sales turnovers during the closures (Brinton, 2021; Reid and Mrva-Montoya, 2022; Vecco et al., 2022). However, the crises were more difficult for independent publishers, as they were more vulnerable to price ups and more reliant on physical bookstores (FEP, 2021). Production disruptions were more prevalent among small- and medium-sized publishers (FEP, 2020; Zhang et al., 2022).

The pandemic has brought about significant changes in employment and working conditions. In numerous countries, print houses, publishers, and booksellers were compelled to shut down or transition to remote work (Betzler, Loots, Prokůpek, Marques, and Grafenauer, 2021; Snowball and Gouws, 2023). However, there were no widespread layoffs in the industry dominated by high- skilled freelancers and precarious employment, mostly in the form of informal employment, part-time, and short-term contracts. In contrast, the pandemic has noticeably increased precarious work through an upsurge in freelancing and outsourcing arrangements, particularly for editorial work and content providers, such as writers and translators (EWC, 2022; Haapakorpi et al., 2022; Wall-Andrews, Walker, and Cukier, 2021; Zhukov, Barrett, and Creech, 2023). Moreover, closures have widened the gap between publishing houses and booksellers, who informally outsource work to cut costs. Independent booksellers and bookstores with limited access to online sales channels faced significant obstacles and were forced to close, leading to job losses and an increase in informal work in the physical retail sector.

There have been no radical changes in the demography of cultural productions during the pandemic (Feder, McAndrew, O'Brien, and Taylor, 2023; Guren et al., 2021; Rivas-García and Magadán-Díaz, 2022), yet the ways in which consumers access these items, that is, buying preferences, have changed with a shift from conventional channels to online shopping (Nguyen et al., 2020; Ren and Kang, 2021). The growth of online shopping has been driven by security measures and people's reluctance to congregate indoors. The number of book orders placed through e-marketplaces and publishers' websites has increased significantly in many countries, partly compensating for the initial decline in conventional book selling. The closure of physical stores and distribution networks (Guren et al., 2021; IPA, 2020) has significantly impacted independent bookstores, resulting in lost trade and income. Conversely, publishing houses and digital sales platforms have benefited from this transition by increasing online sales (Nguyen et al., 2020).

Although financial assistance and incentives were intended to reduce inequality, in some cases they had the opposite effect. The cultural industry, including publishing, is particularly vulnerable to economic shocks and requires government support that is typically contingent on financial resources (Wall-Andrews et al., 2021; Doustaly and Roy, 2022). This need has become increasingly apparent during the pandemic. Therefore, the extent of government support had a notable impact, as state-funded sectors and companies were less affected than those without funding (Ren and Kang, 2021). However, several countries did not offer any targeted financial assistance to their cultural industries (Betzler et al., 2021; Majduchova and Bartekova, 2021). Governments have generally neglected the publishing and creative industries, failing to provide necessary financial support. Small businesses and freelance workers often cannot access employment and income support due to the widespread use of precarious work arrangements (IPA, 2020).

Methodology and Case Study Design

This research was undertaken in collaboration with the Istanbul Provincial Directorate of Culture and Tourism and Istanbul University, utilising a qualitative case study methodology that involved conducting semi-structured interviews with various stakeholders within the publishing sector. As the epicentre of Turkey's publishing industry, with an annual economic output of approximately USD 1.5 billion (Bammel, 2019), Istanbul was selected as the focal point of the study. The city is home to a substantial portion of the regulatory institutions, professional organisations, publishers, and printers in the nation, as well as the intellectual creation and consumption of printed and digital publications. Hence, although this study focuses on reflections of the pandemic in Istanbul, it can be inferred that the results obtained are indicative of the broader publishing industry in the nation.

The interviews comprised 13 questions, which were categorised into three main groups: Impacts, Coping, and Future. The first group contained four questions focusing on the economic effects of the pandemic on themselves, other stakeholders, and the industry as a whole. The second group consisted of five questions, primarily exploring the strategies adopted to mitigate the negative impacts of the pandemic, including new employment, trade, and working methods as well as sectoral solidarity. The third group examined participants' opinions on the future of the industry and the changes brought about by the pandemic, with questions formulated based on scholarly literature and media searches in the industry and tailored following the initial interviews.

A three-stage process was employed to select the potential participants. Initially, three main groups were identified and equally distributed among publishers, bookshops, and trade organisations, representing both sectors. Subsequently, the participants were purposefully selected to ensure that they could provide the most informative responses to the research questions. Finally, some participants were selected during fieldwork to achieve a research balance. To recruit participants, initial efforts were made through media searches and researcher's personal connections. However, during the fieldwork, snowball sampling was the most effective strategy. Additionally, owing to the high number of publishing houses and bookstores in the regions where the research was conducted, some interviewees were identified by obtaining direct permission during field research.

Fieldwork was conducted between March and November 2022. Thirteen interviews were carried out in three specific neighbourhoods where the majority of publishing houses and bookshops were located. Of the 13 interviews, six were conducted with booksellers, five with publishers, and two with trade associations. The booksellers included two members of larger chains and four boutique bookstores that operated small shops with no branches. Three of the publishers were nationally recognised medium-scale publishing companies, while the remaining two could be considered independent publishing houses with a relatively small number of publications. In terms of trade associations, one covers publishers, and the second association covers both publishers and booksellers. Eleven interviews were conducted at the interviewees' workplaces, and the remaining two were conducted remotely via online platforms. Conducting interviews in person enabled on-site observation, which facilitated snowballing in addition to achieving the primary research objectives.

The average duration of the interviews was 47 minutes, yielding a total of 612 minutes of audio recordings. Using online resources, audio recordings were transcribed and subsequently transformed into a text file comprising 66,340 words. Subsequently, the interview data were imported into an analysis software and classified according to pre-existing and newly developed topics during the fieldwork, with the aim of detecting shared patterns among the participants' experiences. Upon analysing the frequency of word usage in the interviews, two prominent themes emerged, namely "book" and "pandemic," which are in alignment with the study's overarching topic. Sub-themes such as sales, production, internet, traditional, digital, and change were found to be closely associated with these two main themes. The analysis was conducted in accordance with this pattern to a significant extent.

The Pandemic and the Book: A Novel Change?

When questioned about the impact of the pandemic on the sector, the majority of participants concurred that it did not generate a novel issue but rather amplified pre-existing problems and evolutions. Despite initially causing panic, publishing houses reported that measures, such as social distancing, curfews, and business closures, led to increased online orders, benefiting the industry. However, after the first three to four months, Internet orders did not completely compensate for the loss of sales of publishing houses but changed the ongoing competition between traditional and digital sales platforms in favour of the latter.

Small businesses, particularly those without access to online sales platforms, experience greater financial difficulties. According to several respondents, these challenges led to the closure of smaller publishers in the sector. Traditional independent bookshops have also been adversely affected by these measures. Specifically, the closure of physical stores and reluctance to be in enclosed spaces resulted in bookstores entirely losing their income for an extended period.

> *"As I guessed at the beginning of the pandemic, the sales dropped about 90-95 percent. Istiklal Street was a ghost town, similar to a scene from a horror movie. The first three to four months of the pandemic had a similar impact on anyone (M8, Bookstore Representative)."*

In addition to changes in demand, disruptions in global supply chains and cost increases caused by the pandemic have had a significant impact on the sector. Disruptions in global trade, particularly at the onset of the pandemic, present a significant challenge to printed book production, which relies heavily on imported raw materials. According to publishers, there was an increase in stockpiling and black-market activity in the supply of raw paper during this period, and appropriate measures were not taken. In addition, excessive volatility and appreciation of the exchange rate made raw materials more expensive for domestic producers who had already experienced problems with their supply chains. According to the figures provided, the cost of raw paper, which was around 500$ - 600$ per ton of first-grade paper prior to the pandemic, has risen to 1,600$. In addition, transport and freight expenses were significant. The considerable rise in shipping fees has led to higher book production expenses. Several publishers reported that their book-printing costs quadrupled, and they had to adjust their prices accordingly. Increases in energy prices, rents, and other expenses have affected costs, with physical space, particularly bookstores, being disproportionately affected.

In short, this period has led to a reduction in the production and distribution channels, on the one hand, and to a steady increase in the price of books, on the other. The long duration of the pandemic and the increase in the cost of books have had a negative impact on consumption preferences, especially among people who do not prioritise reading (according to a representative of the M5 Publishing House). As a result, the initial upward momentum eventually loses over time, leading to a decline in sales figures. Digital sales platforms managed to sustain their financial turnovers, whereas others faced a substantial decrease in sales.

> *"There's been a change in shopping habits, that's for sure. Physical bookstores have suffered significant losses and declines, while e-commerce stores have grown rapidly (M9, Professional Organization Representative)."*

The interviews also emphasised the rise of national and global e-marketplaces, which gradually increased their market position prior to the pandemic, and that publishing cartels, which had long dominated the sector, emerged even stronger from this process and expanded their positions vis-à-vis their competitors. However, for bookshops and niche publishers catering to a relatively narrow readership, the process has been rather unfavourable. Based on their personal observations and rumours, interviewees mentioned that there were redundancies in the sector and that some small-sized publishers and bookshops had ceased to trade. Despite not being specifically underlined during the meetings, precarious and uninsured workers and independent content producers, such as writers and translators, were mentioned to be more severely affected by this economic turbulence.

The New Ways Out of the Crisis

Regardless of their position in the sector, the pandemic's direct and indirect effects compelled firms to implement tactical changes and devise novel strategies. Certain strategies aim to establish alternative working and trading methodologies, whereas others pertained to marketing and sales. First, we may consider a necessary shift in the strategy. Restrictions have been imposed on the closure of workplaces, with the exception of certain areas of work. Before the pandemic, homework and freelancing were widely used in the skilled service sector, including writing, translation, editing, and layout. Therefore, publishing houses can easily adapt to new work rules.

However, this was a serious challenge for bookstores that were unable to switch to remote working. The ban on redundancies has further added to the financial burden on bookshops that already suffer losses from closures. To compensate for these losses, bookstores, particularly those without the option of accessing digital marketplaces, had to change their range by offering non-book products such as coffee, souvenirs, and electronic devices in their shops:

> *"I mean, you inevitably gravitate towards things that you can sell easily. For example, I have electronic devices in my stores. It is much easier to sell them than books are. With these costs, it is difficult to sell books in retail (M7, Bookstore Representative)."*

The pandemic has also brought about changes in conventional trade methods in the industry. Owing to supply issues, paper expenses have increased, payment terms have become more stringent, and maturities have shortened. This has resulted in the emergence of black markets, where prices significantly exceed market rates–a phenomenon previously unheard in the publishing sector. Although financially stable corporate publishing houses were unaffected, small publishers and booksellers reported that they could weather this process by depleting their savings.

> *"Honestly, each of us has sacrificed a bit of ourselves. Everyone in this sector. Patrons endeavoured to avoid laying off staff to the best of their abilities. If they had savings at work, they spent it either to prevent staff layoffs or to keep their shops or business afloat. If he owned a house, he sold it. If he owned a car, he sold it. We have heard numerous examples of this type (M12, Bookstore Representative)."*

Another strategy employed by publishing companies during the pandemic was to delay the publication of new books, decrease the number of reprints, and focus on popular products (IPA, 2020; Reid and Mrva-Montoya, 2022). All the publishers surveyed stated that they did not release new titles except those they were fairly sure about returns and that they were satisfied with the reprints of some of their best-selling books. Another issue discussed in the context of the shift in approach was that certain large publishing firms and digital sales platforms in the industry have transitioned to the 'print-on-demand' method of printing, which entails printing as orders are received, as opposed to large print runs.

(Lack of) Sectoral Solidarity and Hope(lessness)

In countries with a well-established and robust institutional structure in the publishing industry, the sector has maintained healthier internal cooperation and lobbied effectively to persuade governments to allocate more resources to support pandemic needs (EWC, 2022; IPA, 2020). In our case, however, it was a serious source of complaints that there was no solidarity or cooperation with the pandemic in mind, except for the spontaneous and partial efforts of professional organisations. Most interviewees stated that the lack of effective collaboration between stakeholders was the most significant obstacle to developing a comprehensive response to the challenges posed by the pandemic.

Moreover, as one bookseller aptly pointed out, this situation reflects a general pattern of behaviour within the industry, which also manifests itself in other areas beyond the pandemic, such as the fight against piracy and unfair competition:

> *"When UBER came to Turkey, there was an uproar [mention about the protests of taxi drivers against UBER], right? However, nothing happened when Amazon entered the book market (M12, Bookstore Representative)."*

In reality, organisations beyond a few selected publishing corporations with their own printing, distribution, and sales channels were unable to influence public opinion or address their challenges during the pandemic. This was primarily due to the complex organisational structure of the sector and its lack of a well-established, institutionalised industrial nature. Currently, the four main components of the publishing sector - publishers, distributors, printers, and booksellers - operate in different professional chambers, each with its own agenda, preventing them from acting collectively to protect their interests. Furthermore, publishing companies in Turkey tend to be small and short-lived enterprises that operate based on particular worldviews rather than a strictly capitalist approach driven solely by profit motives.

> *"There are few major publishing firms in Turkey; could count on the fingers of one hand. Most of these are small-scale operations, if there are 300-350 publishers in Turkey. These are small publishing firms managed by one or two individuals (M6, Publishing House Representative)."*

However, the process of transformation, which began some time ago and was accelerated by the pandemic, is directing the sector towards a capitalist, consumption-centric approach that caters to popular culture. Digitalisation, which has gained momentum in terms of presentation and consumption but not yet for production, appears to serve this agenda. The existence of financially strong and highly competitive e-commerce businesses operating globally in this sector weakened the position of conventional players in the publishing industry, particularly independent publishers and bookstores.

As per the interviews, expectations for the future of the publishing sector are influenced by this transformation. The interviewees displayed pessimism regarding the future of the sector for several reasons. Along with pandemic-induced financial losses, depleted reader quality, intensified market competition and monopolisation, and insufficient legal infrastructure for the publishing sector were the primary causes of despair. In brief, all interviewees expressed unanimous agreement that the future of the sector would be influenced by the indirect consequences of the pandemic, market imbalances, and increasing inequalities rather than by the pandemic itself.

There was an emphasis on the urgent need for competition law reforms and implementation of the fixed price law, which limits the pricing ability of online sales platforms. Cooperation among industry players is deemed crucial in this process, yet it seems unattainable. Therefore, without new regulatory measures, existing competition will strengthen digital platforms, leading to monopolies dominating the publishing, distribution, and sales networks. Consequently, boutique publishing and small bookstores would inevitably continue to withdraw from the sector.

In summary, until now, there have been no notable bankruptcies in Istanbul's publishing sector. While some areas have experienced substantial growth, others have faced increasing challenges that have been ongoing for some time. However, most interviewees believed that independent businesses would eventually abandon their positions on monopolistic publishers and online sales platforms, leading to many closures in the near future. This is why one interviewee's statement, "*We survived this one, but we spent all our savings*" is particularly relevant. "*We do not know what we will do for the next one"* stated M1, a representative from the bookstore, conveying his anxiety and hopelessness about the future. This sentiment was echoed by the majority of interviewees and reflected the overall mood.

Discussion and Concluding Remarks

This study sought to understand the professional experiences of stakeholders in Istanbul's publishing industry during the pandemic and found that the pandemic has had a markedly negative effect on boutique booksellers and small-scale, independent publishers, speeding up the ongoing trend towards digitalisation and monopolisation. In essence, the experiences of Istanbul's publishing industry were largely consistent with those of the global context, albeit with unique nuances.

The first punishments of the pandemic in the publishing industry were production supply and costs. The disruption of global logistics and supply chains has caused a scarcity of raw materials in the paper and pulp industry, leading to price fluctuations and production shortages (Brinton, 2021; Done et al., 2022). In Turkey, where the publishing industry is heavily dependent on the import of raw materials, the rising exchange rate has further increased the cost of raw materials and shipping, quadrupling the total cost of books in a short period of time. Regardless of market size, this first shock manifested as a sudden drop in book sales through traditional retail channels (Betzler et al., 2021; Capano et al., 2020). However, the industry exhibited resilience and rebound after the initial setback, albeit with marked disparities across segments (Guren et al., 2021).

The publishing industry was initially confronted with challenges of production supply and costs during the onset of the pandemic. The disruption of global logistics and supply chains has caused a scarcity of raw materials in the paper and pulp industry, leading to price fluctuations and production shortages (Brinton, 2021; Done et al., 2022). In Turkey, where the publishing industry relies heavily on the import of raw materials, these were further exacerbated by the dramatically rising exchange rates, so that printing and shipping costs quadrupled in a very short period of time. The second shock of the pandemic manifested as a sudden drop in book sales through traditional retail channels regardless of market size (Betzler et al., 2021; Capano et al., 2020). However, the industry demonstrated resilience and rebounded after the initial setback, albeit with notable disparities across segments (Guren et al., 2021).

In general, larger corporations with robust financial and institutional resources fared better than smaller ones during the pandemic, as they were able to effectively diversify their product offerings and sales networks, enhance their lobbying activities, and possess greater bargaining power and inventory management capabilities (Reid and

Mrva-Montoya, 2022). The impact was more severe for independent publishers and small- to medium-sized enterprises, particularly those dependent on physical bookstores (FEP, 2021). Despite being considered one of the leading markets, the publishing industry in Turkey primarily consists of small, mostly short-lived enterprises, with only a few major corporations. This holds true in both the publishing and bookselling sectors. As understood from the interviews, these companies struggled to maintain their operations during the pandemic and often relied on personal savings to stay survive.

Shortly after the pandemic erupted, educational institutions, libraries, and book fairs were either canceled or transitioned online, while lockdown measures compelled businesses to either cease operations or shift to remote work (Betzler et al., 2021; Snowball and Gouws, 2023). In the long run, the dichotomy between physical and online retail has become more pronounced, reflecting changes in buying preferences and the shift from conventional channels to online shopping (Ren and Kang, 2021). In many cases, the mandatory closure of workplaces led to the shuttering of bookstores, which, unlike other businesses, could not pivot remote operations (IPA 2020).

In Istanbul, as in other cases, this development has worsened the gap between publishing houses and booksellers, resulting in more dismissals and informal work in the physical retail sector, especially among small booksellers who do not have access to online sales platforms. However, it is worth noting that small businesses in Istanbul have adapted well to online trading platforms. Some have chosen to use their own web pages, while others have turned to e-markets and specialised platforms for selling used books. Despite this diversification, physical bookstores still remained the primary channel for book purchases. However, there were serious concerns and complaints regarding the growing share of e-commerce in the retail book market.

Government support has emerged as a critical component for mitigating the adverse effects of the pandemic on the publishing industry. Research indicates that companies and sectors receiving government funding exhibit greater resilience than those without such support (Doustaly and Roy, 2022). Nonetheless, the cultural sector, including publishing, remains particularly susceptible to the pandemic's economic impact, with numerous governments neglecting to provide targeted financial aid during these challenging times (Betzler et al., 2021).

In Istanbul, vulnerability and the need for government support were particularly acute, as a large portion of the sector comprised small enterprises with limited financial resources and informal employment was more prevalent in the city than in other developed markets. In the pandemic, these small businesses and freelance workers often encountered difficulties in accessing employment and income supports, leading to a rise in freelancing and outsourcing arrangements, particularly for editorial work and content providers. This trend has also exacerbated existing precariousness in the retail sector.

Further empirical investigation is necessary to gain a comprehensive and general understanding of the pandemic's impact on the publishing industry. However, this study's findings suggest that Istanbul's pandemic experience is not only local but also global. Similar to other regions, the pandemic has presented both opportunities and challenges to the publishing industry in Istanbul. During the pandemic, e-commerce platforms and financially and technologically strong publishing corporations emerged as winners. However, niche and independent publishers, as well as small physical bookstores, suffered significant losses. This was likely due to a combination of cost increases, lockdowns, and changes in customer behaviour.

Declaration

In all processes of the article, TESAM's research and publication ethics principles were followed.

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Interview Information

Anonymous Name	Position	Interview Date	Type of Interview	Interview Duration
M1	Bookshop	1.07.2022	Face to face	00:41:23
M2	Publisher	30.06.2022	Face to face	00:38:45
M3	Publisher	4.08.2022	Face to face	00:29:30
M4	Bookshop	4.07.2022	Face to face	00:29:16
M5	Publisher	29.06.2022	Face to face	00:45:15
M6	Publisher	4.08.2022	Face to face	01:10:03
M7	Bookshop	30.06.2022	Face to face	00:47:40
M8	Bookshop	1.07.2022	Face to face	00:17:54
M9	Profes-sional Organi-zation	29.06.2022	Face to face	01:04:22
M10	Publisher	23.11.2022	Face to face	00:55:58
M11	Profes-sional Organi-zation	19.11.2022	Online	01:01:10
M12	Bookshop	4.08.2022	Face to face	00:49:58
M13	Bookshop	1.07.2022	Face to face	00:49:37