

## The impact of Covid-19 on independent publishing

### 1 How has Covid-19 impacted your *print* sales in the last six months?

Sales down by up to 25%	<b>26%</b>
Sales down by 25% to 50%	<b>24%</b>
Sales down by more than 50%	<b>21%</b>
Little change	<b>17%</b>
Sales up by up to 25%	<b>7%</b>
Sales up by 25% to 50%	<b>4%</b>
Sales up by more than 50%	<b>1%</b>

### 2 How has Covid-19 impacted your *digital* sales in the last six months?

Sales down by up to 25%	<b>5%</b>
Sales down by 25% to 50%	<b>3%</b>
Sales down by more than 50%	<b>3%</b>
Little change	<b>36%</b>
Sales up by up to 25%	<b>31%</b>
Sales up by 25% to 50%	<b>10%</b>
Sales up by more than 50%	<b>10%</b>

### 3 Have you furloughed any staff over the last six months?

Yes, fewer than 25%	<b>17%</b>
Yes, 25% to 50%	<b>6%</b>
Yes, 50% to 75%	<b>9%</b>
Yes, 75% to 100%	<b>6%</b>
No	<b>63%</b>

### 4 If used, has the furlough scheme benefited your business?

Yes, it protected jobs	<b>62%</b>
Yes, it ensured our survival	<b>22%</b>
No	<b>16%</b>

### 5 Have staff at your company returned to their pre-pandemic places of work yet? (Excludes those who worked at home anyway. Most responses date from before the announcement of England's second national lockdown in November 2020.)

Yes, some	<b>25%</b>
Yes, all	<b>7%</b>
No	<b>39%</b>

**6 How successful has your company been in changing working practices in the last six months? (Excludes those for whom there has been no change.)**

Very successful	<b>45%</b>
Fairly successful	<b>43%</b>
Neutral	<b>10%</b>
Fairly unsuccessful	<b>1%</b>
Very unsuccessful	<b>2%</b>

**7 Has your use of freelance staff changed in the last six months?**

Used more freelancers	<b>10%</b>
Used fewer freelancers	<b>20%</b>
No change	<b>70%</b>

**8 Have you experienced any distribution challenges in the last six months?**

Yes	<b>70%</b>
No	<b>30%</b>

**9 Have you experienced any credit control challenges in the last six months?**

Yes	<b>32%</b>
No	<b>68%</b>

**10 How optimistic are you about prospects for your business over the next six months?**

Very optimistic	<b>9%</b>
Fairly optimistic	<b>47%</b>
Neutral	<b>29%</b>
Fairly pessimistic	<b>13%</b>
Very pessimistic	<b>2%</b>

***Figures are based on a survey of 126 IPG members in October and November 2020***

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## Members' views...

### ... On distribution challenges in the last six months

- Maintaining supply chain from printer to warehouse; and from there directly to customers globally. A very fragile thread, but somehow held up!
- Wholesalers were closed for a period of time near the start of the pandemic. And at times there was a backlog at our distributor due to reduced staffing levels for social distancing and rapidly increased online retailer orders. For the most part we could get books out to the places they needed to reach, and MDL provided very good written updates on what was happening at their end throughout.
- Books taking longer to leave the warehouse.
- Longer print production times affect our POD methods.
- Closure of both wholesalers in April—our worst month ever! Failure of Bertrams. Difficulty getting books overseas, especially Australia and the US.
- The loss of Bertrams and limited availability on worldwide delivery on Wordery and The Book Depository.
- Direct sale fulfilment particularly badly hit, and US distribution.
- Signed up for a distributor just before COVID hit, then I was not certain they would be able to fulfil orders as most of their staff went on furlough without telling me and communication almost ceased. So, with some polite tweets and emails, I managed to get a consignment deal with Gardners which was a life saver! Also, Lightning Source were brilliant at helping me with some fantastic discounts that really helped and kept the supply of my books in POD going. Covid or no Covid, it's very hard to get distribution as a small publisher, but I battle on.
- Some challenges manufacturing during the strict lockdown. Sustained issues shipping in Canada. No customers to distribute to, and when the shops did reopen, very little market for them.
- Closed for a month.
- The warehousing of our US book distribution centre was closed for a while early on the outbreak.
- Bertrams went out of business.
- The temporary closure of Gardners.
- Delays in US POD at one point was up to a month. It was quicker to print in the UK and ship.
- Distribution warehouse shut for a period. Overseas post disrupted.
- Turnaround heroically kept one warehouse open so we were able to sell from our website while shops were closed.
- Some bookshops closing; others not taking much stock.
- Slower distribution, and delays in our distributor being able to receive reprints and new titles.
- The supply chain both at retailer and distribution centres was challenged by social distancing in busy warehouses. Largely speaking these problems passed once lockdown ended.
- No in-person sales at launches and festivals.

- Collapse of Bertrams and a high rate of returns from orders supplied before the pandemic began.
- In April our distributors had to close due to Covid for a couple of weeks. Now things are OK but slightly slower than normal.
- Distributor slower getting books out. Due to bookshops being closed we were very reliant on Amazon who removed the 'Buy' button from new titles.
- Our warehouse has been severely affected. But they have limped through. It has in many cases been a skeleton crew getting our books out, but despite this books have really only been a day or two later in despatch at worst.
- Our distributor was forced to reduce staffing levels radically and later to rearrange work practices. Our American distributor closed down for several months.
- Yes, but these are largely because we have moved to full POD global from a print and stock delivery position.
- Delays in order processing / communication.
- Bertrams going into administration.
- With the closure of universities, regular shipments to libraries were postponed.
- Distributor has been slow because of physical distancing measures in their office and warehouse (not blaming them at all, by the way!). Bertrams going bust was an issue as well.
- Payment schedules were lengthened.
- Our distributor shut down without notice, an hour after taking in all the print runs for our summer launches.
- It was very challenging at the beginning of the outbreak with borders closing etc. We found some countries were increasing customs / taxes significantly.
- Delays in supply chain, but now largely returned to normal lead times.
- Our own distributor had staff on furlough but could more or less cope with the demands of our business. Closure of Bertrams cost us some money. Temporary closure of Gardners had a big impact in April.
- Warehouses were working very slowly and printing schedules were changed causing problems to Christmas time sensitive books. Easter promotions disrupted.
- Orders from abroad stopped. Never processed any order from abroad at all.
- Delays due to reduced staff numbers.
- Closure of some book distributors, sales agents, bookshops, warehouses and university libraries has led to reduced sales and distribution.
- Argosy (Ireland) not taking new submissions.
- Issues with Gardners and Amazon for stock and availability.
- Temporary shutdown of Gardners. Administration of Bertrams. Turned to Fulfilled by Amazon as a temporary measure, which was not without challenges.

- Minor disruption to delivery times during the height of lockdown.
- We can't call our UK distributor so communication over complex matters can be difficult and takes longer to resolve. Some issues with shipping to North America, which has now been resolved. Customers cannot pay by credit card without difficulty, which can be challenging and time-consuming.
- Reduced staff at warehouse resulting in delays or refused orders.
- GBS operations and Amazon.
- Amazon supply chain in the early phases of the pandemic and their unconstrained ordering patterns.
- Supply chain issues that we experienced with Gardners, Amazon and Bertrams. Our actual two main distributors carried on supplying whatever demand there was.
- Orca in the UK slowed down, but recovered quickly. Hachette in the US continue to give a poor performance and have not been picking single title orders.
- Specifically, a move to sea freight for Australian orders which has impacted publication dates.
- Some countries (Australia) effectively closed for a few months. Everything slower and more complex than before.
- Our distributors have coped well, but there have been inevitable service changes that we have had to adjust to.
- Distribution has been fine but many sales outlets have been closed so we have had a huge challenge in reaching our customers.
- The peak lockdown months were a challenge for our warehouses in the UK and US, particularly when dealing with Amazon, whose fluctuating ordering and lack of ordering was an issues.
- Initially distribution was slowed as Gardners and CBS had to socially distance their staff when they were able to reopen. But we had good stocks of books in the office, so all direct orders were despatched the next day without problems. If the Post Office had stopped we would have been really impacted, but they kept going magnificently.
- Some slow down in order turnaround time and reduction in services offered at height of pandemic.
- Royal Mail has been hit and miss.
- One major customer going into administration, another major customer halting purchasing, many countries having all deliveries held off at various times.
- The supply chain in general is in dire need of change.
- Price of air freight has meant our overseas buyers are either demanding more discounts or shipping by sea.
- Can't airfreight stock anymore so had to rejig pub dates. But has worked well
- Failure to deliver = returns.
- Urgent stock movements from UK to US distributor very difficult and very expensive; huge increase in airfreight costs. Forced to print separate runs in the US at much higher unit cost, rather than do the usual stock transfers.

- Distributor unable to supply web orders due to staff on furlough / social distancing in warehouse.
- Our own online shop has not been able to give the level of service we expected, with periods of quite long delay due to the situation at the warehouse (distancing and staffing).
- Amazon not stocking. Longer lead times.
- Disruption in supply and changes in ordering patterns towards smaller orders.
- Printers, wholesalers and warehouses impacted with delays.
- Our direct sales through our website quadrupled, and this helped compensate for the 60 to 80% drop in bookshop sales in the UK and the US. I spent a lot more time wrapping books for posting, and cycling to the post office.

**... On credit control challenges in the last six months**

- Money we'll never see back from Bertrams has caused major cash flow problems.
- We don't have enough income to cover our costs.
- People stopped paying bills for a few weeks and some places went out of business.
- Gardners cancelled all advance orders and Tate Galleries put on stop—two indicative examples.
- With no one chasing our debts and no one to process payments, we have a large outstanding amount of debt to try and chase. Hoping all our customers are still trading!
- Folk taking much longer to make payments.
- Smaller retailers have needed extended credit.
- Overseas government client has not paid a January invoice as a result of Covid.
- Bertrams, but otherwise not much change.
- More fraud attempts on our website, and a small amount of bad debt.
- Our printers are now asking us to pay 100% up front.
- Slow payments from overseas customers in countries such as India, Sri Lanka, Indonesia and Cambodia.
- Lost money from Bertrams going under.
- Bertrams going bust.
- The distributor ran months behind in paying dues.
- Our authors are taking longer to pay for pre-publication orders.
- Problems with bookshops and export businesses going into receivership. Large US publishers not paying in a timely manner.
- Numerous customers requesting payment plans. Collapse of Bertrams a huge loss for our business with unrecovered payments.
- Loss on Bertrams handled by our print distributor. Stock recovered. Overall, not material as most of our business is digital and rights.
- Difficulty in the manner of taking card payments with a distributor working from home!

- Experiencing slow payments, staggered payments and some businesses going into liquidation.
- Bad debt at Bertrams and Baker & Taylor account was on hold for several weeks.
- Bertrams failure owing us about £15,000.
- Some delayed payments from creditors due to offices not being fully operational.
- Customers asked for significantly extended credit: this was granted. Some are now back on regular credit, while others continue to work their way back to normal trading.
- Two main issues: Bertrams in the UK and one US customer.
- Bertrams going bust has been a huge blow.
- Having to extend terms to come direct customers and the collapse of Bertrams.
- Some distributors and retailers are requesting more time to pay.
- Some delays in payments but actually not nearly as bad as we feared
- Late / no payments.
- More customers overdue with payments than before
- Accounts unable to pay!

**... On changes to sales and marketing work in the last six months**

- Doing more online—the drift in that direction has speeded up.
- Not much change apart from no international travel. Almost all analogue marketing spend diverted into digital.
- Increased digital marketing including webinars, author videos etc.
- Less Twitter (It's next to useless), and more Facebook and Instagram. Also working on blogging and keeping the website up to date and reaching out to people and contacts via email and some polite letters.
- We have rebuilt our website and are just starting on active promotion. But we have to be realistic: most of our sort of publications are bought in destinations and not pre-ordered.
- We are in a process of reevaluation.
- Doing more online and via remote calls.
- The academic conferences we normally attended were cancelled, and there has been greater emphasis on digital marketing promoting digital products.
- More marketing promotion on our website.
- Much more targeted to driving online sales rather than bricks and mortar.
- My commission-based marketing person felt the challenge was too great and resigned. Reviews are exceptionally slow. I've paid less attention to sales and marketing and went looking for new projects instead.
- More focus on social media, started regular blogs and used email newsletter to ask supporters to buy via the website.

- We have completely rethought our strategy and have developed are in the process of upgrading all our online presence.
- We've rescheduled our list to push most of our books into 2021—those that we published this year have been promoted only via social media.
- Much more direct to consumer and planning more for the future.
- Focussing on online marketing, mainly via social media, collaborating with other organisations and influencers, special offers and discounts promoted via social media, changed from a monthly to weekly newsletter to keep up momentum and push online sales.
- Increased ebook production, and prices. If libraries switch from print to ebooks we still need to recover overheads, so some ebook prices up.
- Further investment in digital.
- More online marketing.
- We have moved a considerable portion of our sales onto our website platform and grown our newsletter base by nearly 200% by giving away free ebooks and asking for donations.
- Not physically calling on any accounts large or small. More customer contact via email and Zoom. Increased promotional activity with online customers. Subsequent promotions and offers for independents. Reduced non-core sales activity and meetings as many staff are on reduced hours, eg no physical sales conference.
- I'd like to say that we revolutionised our marketing practices and immediately mastered the hosting of digital events to replace the many physical events that were lost and so on. In reality, we just cut back on some tasks where it was difficult to draw a direct correlation between activity and sales (eg the content strategy for our website, some more general social media activity) and focused on getting the core stuff right on the few books that remained in their original publishing slots. The marketing team was affected by furlough and unfortunately the feeling among those left was that the energy and time required to radically change our practices would outweigh the benefit. I expect this to change now we're back up to full strength.
- We have reverted to a stronger content marketing strategy to drive online sales, moved to digital events, and made a successful drive to grow our members scheme.
- All event marketing has flipped to 100% digital marketing. Bookshop sales are down. We have been investing in a new website to sell direct, but not yet live.
- Shorter print runs. Greater emphasis on direct.
- More online marketing.
- Cut back on new releases.
- We instigated new marketing plans such as YouTube videos of authors reading their books, and getting a Zoom account to have online events. We worked with a marketing specialist.
- Our sales direct to schools have slumped, but fortunately sales via online bookshops and to individuals have increased. We have continued to market via emails to schools, in particular offering

discounts and free resources (which have been well received) but have also increased Amazon ad spend.

- We send out very few hard copy inspection copies now.
- Sales of new titles down as we have been unable to organise book launches. Increasing our presence on social media.
- No conferences, more e-blasts to libraries about our ebook programme.
- We have targeted online events to drive sales to our website. This has more than made up for the lack of in-person events / conferences, in terms of sales.
- Shift to digital accelerated.
- We are looking at investment to take us more completely into digital.
- Much greater use of video and online events.
- We moved our website to focus purely on digital-only content. By removing print books, this allowed us to remain fully operational and make more profit on each item sold. The channels we focus on such as YouTube took a dip for most of the past six months in terms of the rate of growth, but are now back at pre first lockdown levels.
- Working with a number of consultants on briefs for new projects.
- Inspection copies to lecturers home addresses.
- Stopped contract work for other publishers.
- More online marketing. Freelance sales display calls to universities have stopped, as has physical attendance at freshers fairs.
- Have instigated much more digital marketing and advertising via Facebook and Instagram.
- We've built and launched a new website. Delayed sales until we felt the book trade might be back, though missed out because our repping company took the chance of extended furloughs. Far fewer books were sent out for review, as we felt it was pointless overloading unmanned mailrooms, so we sought email interest first. Hard to access that info though. Beyond titles in February, all books that might benefit from launches are being held back till 2022.
- We have hired a consultant on user experience and are looking in a much more granular way at our digital marketing.
- Almost all marketing ceased due to uncertainty and lack of time as I was reduced to much lower capacity due to home-schooling.
- No face-to-face sales.
- A greater focus on digital marketing.
- Everything online—hired an extra publicity person.
- Worked much harder on social media. Increased our advertising spend. We had to cancel book launches, which lost us money. Lost money booking Frankfurt stand via the PA.
- Participated in virtual conferences and significantly increased our digital marketing activities, which have proved to be very successful.
- Some marketing now doesn't take place—eg book launches and conference attendance and promotion. Some book launches have gone online instead and digital advertising at conferences remains an

option. Social media has increased in importance as a marketing challenge and we have seen higher engagement levels.

- Took on a new sales agency and a full-time director of sales, marketing and publicity.
- All on hold for three months in the summer.
- Everything has gone online including events etc.
- Increased advertising for sales through our website.
- Increased our spend on digital marketing.
- Increased online activity and virtual events.
- We made the decision to change sales team and warehouse. We increased direct customer contact and reviewer contact. We learned about online book launching.
- Steadying the ship and taking a more cautious approach to marketing spending. Taking more action of digital sales campaigns. Though we are also in the midst of a full print and digital distribution move and new website launch so we are in an unusual situation as things stand.
- More concentration on digital direct to customer while bookshops have been closed or ordering lower amounts. Marketing have also been running online events, author launches and subject based seminars etc.
- More marketing at global book fairs via agents, although sadly Beijing was cancelled. Also have a consumer marketing project planned for October as an addition to our normal work.
- Printed marketing has shifted to digital, which involves some changes of skillset. Need to connect via email has its challenges. Selling without bookshops for three months was obviously difficult and remains difficult.
- Focused on social media as face-to-face opportunities were limited or impossible.
- Increased activity on social media and through our newsletter to reach consumers directly. More research into consumer insights.
- More online as no face-to-face possible, which has been a huge challenge.
- The main issue has been that we are not able to attend conferences, as they were cancelled at first and now they are virtual. They are a key part of our business but we have done what we can to extend our virtual reach.
- All presentations are now via Zoom.
- No print / direct mail. Emphasis in making sales via the website. Working on new website to improve e-commerce.
- Have actually had time to review marketing and sales approaches; programme being developed to move business forward with online outreach.
- Emphasis on sale through our own website and increased social media presence.
- Increased social media activity.
- Attempted to increase online and social media promotion. Very difficult to get a foothold.

- Greater push on social media for ebooks, specifically during proper lockdown, and a relaunch of our website to include e-commerce.
- Obvious digital focus.
- Lots of video work: online pre-recorded book launches, video samplers, video interviews. More activity and advertising on social media. More focus on our own website as a sales channel: deals, offers etc.
- While we have always been very focused on online sales and marketing, we have doubled down on these efforts as the main routes to reaching customers.
- Everything is digital. Stopped producing printed catalogues. Much more work going into social media, online marketing and improved quality and variety of our digital sales material.
- We are concentrating more online.
- Our marketing continued much as normal with a stronger emphasis on our social media and company blog work during the height of the lockdown period, just trying to keep people as aware as possible of what we do and what we have to offer. Our sales have changed in that we have moved from agency representation to the appointment of an in-house sales director.
- We have moved and focussed much more across all imprints on direct marketing. This was driven by two of our imprints doing more direct selling but also through the struggle to get good PR.
- Scrutinising where sales come from across platforms a bit more closely.
- Very limited face-to-face contact with buyers. Greater emphasis on Amazon.
- Greater use of webinars for book launches and visibility.
- With cancellation of all major academic conferences we've been running our own events online to give our authors a chance to showcase their titles. We've cancelled sending out print catalogues as there is no guarantee that they'll be delivered to institutional addresses.
- Marketing has focused much more on building and sustaining relationships with customers and where possible directly with consumers / readers.
- 14 sales and marketing staff reduced to two.
- We have started making personalised video messages with video powerpoint presentations of catalogue highlights for distributors and key retail accounts, both to push titles and remind them of our presence and offer a more personal touch.
- Much more Zoom meetings, more online marketing and virtual sales presentations.
- I have tried to do more direct sales via our website.
- More direct to consumer projects in the pipeline with Kickstarter.
- Have cut sales force by 25%.
- Moved publication of some more publicity-hungry titles from the Spring to later in the year.
- More focus on D2C sales

- No conferences to attend, which is a real problem when growing a books business and wanting to meet customers face-to-face.
- We have done much to develop our online shop. We have also used the break to move from Sage to Xero, a major and positive transformation. We have been implementing our new royalties system and making other fundamental adjustments to the business.
- More emails and marketing via social media.
- More digital advertising.
- Moved online.
- More direct engagement with customers, development of our own ecommerce function, including ebooks.

### ... **On other pandemic-related challenges**

- Being unable to meet prospective new authors makes it harder to size them up—definitely taken on one who is very hard work and I would have realised we couldn't really cope with them if we'd been able to meet face-to-face
- Yes, delays in production from Malaysia and China for our books. Delays in delivery and couriers for customer orders and exports, even via DHL.
- Cashflow forecasting was very difficult.
- About to enter a second—and perhaps more difficult—phase of trying to keep remote workforce motivated for another six months. Being able to network and find new authors.
- Only really around creative connection of the team—hard to do well remotely.
- The additional stress level and injustice of being excluded is not pleasant.
- We lost some margin due to the change in sales pattern. The VAT change on ebooks helped to mitigate this though.
- It has accelerated the decline of the media and when we had very good reviews in April / May we could not translate them into sales.
- No significant challenges, but there have been many situations that would have benefited from face-to-face contact.
- A big part of our business model involves restaurants and food outlets, and we have had to completely kill that—but so far we have adapted OK and are building a slightly different but still profitable business.
- Covid is now the top reason why authors are late delivering.
- With the closure of many bookshops in the spring, our sales reps advised us to defer publication of new books to the autumn, which has had an unpleasant knock-on for cashflow.
- Covid coinciding with Bertrams going out of business was almost catastrophic—with repayment of the debt required at the same time as the dip in income from our distributor reflecting April and May trade sales. Also, our biggest sales events of the year being effectively cancelled made a huge hole as they are both direct selling events and therefore very profitable. We would have gone out of business were it

not for the fact that an investor had, at the end of 2019, provided funds for the purposes of exploring wider sales opportunities. For the moment we are spending them on survival!

- A number of authors have suspended their writing activities because of other pressures on them.
- More difficult to find review space within broadsheets as it continues to shrink.
- Consultancy dried up as a result of no new initiatives.
- Staff morale. Everyone is anxious about losing their jobs. Furlough has saved jobs and yet caused massive disruption because either unfurloughed people have taken on extra work or it hasn't been done and whole areas have been neglected.
- Some academic authors as unrealistic as ever!
- Waterstones are being very selective in their buying and are ordering less and in some cases not ordering books at all. Communication has not been easy with them. I understand their position but this is our single biggest problem / challenge.
- We have had to delay production and new commissioning, and reschedule titles already contracted.
- The challenges posed by the cancellation of the London and Frankfurt Book Fairs are difficult to quantify now, as rights deals (sales and acquisitions) can take time to come to fruition anyway, but I suspect a financial impact will be felt over the coming year. It is tricky to cement new relationships via Zoom and to truly convey the vision for a particular book or, indeed, an imprint. Growing our rights sales with the acquisition of general non-fiction titles with wider appeal was a key part of our forward plans and the success or not of virtual fairs remains to be seen.
- It has changed our view of certain things, and presented major work challenges, especially around creative teamwork, publicity distribution, and general levels of company communication.
- Cashflow has been a nightmare. Our well-financed owner has been a godsend, but that will not last forever. Already looking at redundancy scenarios, worse case being shut down which depends on the next four trading months (October to January). Considering amalgamating with another publisher. There are options but all depend on recovered sales.
- Clients using the pandemic as an excuse not to pay for work or books already supplied.
- Uncertainty and stress.
- The verdict is still out about our normally most successful time of year the 'back to university' / autumn academic season. Sales of some of our bestselling academic titles are a little down.
- Planning forward and investing in the future list has become even more difficult than before.
- We find it harder to get print books stocked with suppliers such as Waterstones and Foyles, for obvious reasons. We also focus heavily on schools, but the funding seems to have dropped off. Another

challenge is that many of our books and resources are to help with recruitment. Whilst some industries have performed well, many have put recruitment on hold or changed the process entirely.

- Travel disruption.
- Developing other ways of earning an income using transferable skills.
- We sell direct to some universities as well as to students, and universities have not been buying the sorts of books we've sold them for the past couple of years.
- The loss of a retail partner for a book that was printed in numbers to be on sale at an exhibition that was cancelled.
- Lack of time has been the primary challenge. I had to cancel 75 titles and I'm behind on current schedule. Overdue running sales and royalty reports.
- The creativity of working in a studio environment.
- Collapse of Bertrams at this time was very hard and we lost a lot of money there. Less traffic through bookshops. The Bounce Back Loan and the £10,000 grant were invaluable.
- Increased work loads, as scheduled work planned for work experience staff had to be reallocated and rescheduled.
- The opposite in fact—it has strengthened and benefited our open access model.
- The pandemic has lowered print sales significantly, by making physical retailers more cautious. Since print sales through physical retailers have traditionally represented the biggest proportion of our sales, this has caused challenges, particularly around high stock levels and a looming pinch in cashflow. Despite these twin challenges, there is significant strength in the quality of existing and upcoming titles.
- Made the launches of our first list a complete write off with the book trade. Probable waste of c£15k spend—critical business launch money.
- Workload, stress, mental health and staffing.
- The loss of one wholesaler meant unpaid bills and returned stock. The closure or low productivity of overseas publishers meant a lack of communication with potential customers.
- It has had an impact on production schedules and delayed frontlist publication dates. This was partly due to staff furlough and partly to protect sales on frontlist titles as we felt it was better to hold publication on April or May titles for June. We will likely feel the effect of this on sales this year. It isn't fully clear if delaying publication was the right or wrong decision. Time will tell if we can recover sales on frontlist sales which have published during the pandemic with marketing pushes through to the end of the year and early next year.
- The closure of churches and no singing allowed has caused the biggest problem for religious publishers.
- Changed publication plans for one title to avoid clashing with large publishers moving March to July titles back to later in 2020.
- Lack of ability to carry out essential foreign rights travel.
- Acquisition because of the lack of educational events.

- More uncertainty as to what the medium-term outlook is.
- Government messaging has been atrocious. Pressure to return to the office followed by pressure to reverse this gives no confidence in decision-making or using data sensibly. Support for SMEs to move to remote working would be a good idea. Grants for laptops / cloud computing could be well used and help bridge competitive gap that exists with large organisations.
- Looking ahead we do not have the personal funds to weather any further economic decline so have decided to sell our home to pay off the mortgage and downsize. We will recoup from a baseline we know is sustainable and will release funds to carry our businesses forward.
- Had to delay publication of UK travel guide as not known which pubs / restaurants would survive.
- Trade sales were obviously reduced to near zero as we went into lockdown. Following the reopening of the shops, it has remained difficult getting new titles into the high street, particularly with some major chains.
- UK trade sales have been very challenging, whereas US and Australian sales have seen an uplift.
- Commissioning and scheduling publication: publishing is a long-term game, and the rules are changing every week. It's difficult to predict. Printing and logistics are also more expensive and complicated than before. And that's before the impact of Brexit comes in.
- Reaching customers has been a massive challenge. Amazon have kept us afloat which is something I never thought I'd say!
- We were very worried about cash flow, and took out the Bounce Back Loan, but the increase in direct sales really surprised us. We've managed better than we expected. But then Bertrams crashed which was a gut punch, as they owe us £2,500, but we'll survive.
- Cannot arrange public conferences to run alongside our publication schedule and that has affected turnover as they can be very lucrative. On the upside sales through Amazon have sky rocketed so we have had to keep pace with stock levels.
- We've actually had a glut of manuscripts as authors in lockdown have found the time to finish off their works. This has meant that we have a backlog of material coming through the works.
- It has been necessary to pay attention to individual morale much more than in pre-pandemic circumstances. The general aim of this has been in maintaining enthusiasm through personal contact, with focus on individual needs where necessary.
- The main problem has been that I have not been able to access any grants, and have had zero income from the business. In fact the business has kept running by me injecting some savings.
- US distributor had various problems which had a knock-on effect that delayed some projects.
- We have actually hired a new member of staff and have not been affected too greatly by the pandemic.

- The main challenge has been servicing the remote working staff from central office with a staff for the most part of one. Having seven or eight people remote working, but working through the central server and needing information from central records, has been a challenge.
- Quality control of printed books.
- My problem has been that as the sole employee of the business, and also the owner, I haven't been able to furlough myself and I have not been able to access any company schemes.

### ... On the success of changing working practices

- Working from home became the norm very quickly.
- We moved to 100% remote and it was all fine. We are suffering a bit from creative fatigue.
- We already had a telecommuting policy in place so some people did part of the week at home. The switch to full time remote working went very smoothly and has generally been a positive experience.
- All staff are working very successfully at home and we intend to continue to do so until the new year. All our regular meetings continue using Google Meet. We surveyed staff recently and most would be happy to work from home either all the time or on a flexible basis. We already offer flexible working but will introduce more flexibility in the new year, when we next review the situation.
- I think we are forced to be more efficient. The lack of natural day to day contact means Zoom meetings are more structured than normal meetings used to be, and everyone seems to be more accountable. Also, external meetings are mostly on Zoom and therefore more time efficient and cost effective. Less distraction too as we are all remote.
- We are a long way through a process of going virtual.
- As most businesses, we switched from 90% in office to 90% working from home. On the whole managed well, and far more efficient. Communication now starting to become an issue, particularly across teams and particularly with the more creative ends of the business.
- We were already set up to work flexibly as many of the staff worked at least one day per week from home. We've taken personal circumstances into account wherever possible, which has seen a large number of staff change their working patterns to cope with an ever-changing situation. Virtually everyone has a laptop plus screen rather than a desktop, and all key systems are either cloud-based or can be accessed via a VPN. Our staff survey results suggest that the technology is holding up well and for some people the difficulties arise more from not being able to replicate the comfort of the office (a proper desk and chair) at home where space is sometimes at a premium. From a management perspective a challenging element was learning how to communicate properly, especially initially when the 'business rhythm' of one-to-ones, team meetings etc was disrupted. And there has been a LOT of email when things would usually be resolved with a quick conversation in the office. To summarise, it has worked well from

a purely technical 'working practice' standpoint, but the creative and cultural elements of being in a physical space are impossible to mimic online.

- Remote working has worked so well we are letting go of our office lease in March 2021 (30 desks and server room) and moving to services offices (7 desks + 100% hosted IT).
- It helped us to digitise some processes that were previously done by unnecessarily printing documents. Some staff struggle to work from home and remote training is not always simple.
- All our staff are working from home, with me in the office at least twice a week. We have two weekly staff meeting by Google Meet. Personal interaction and sharing of ideas is very much missed, and two employees have expressed a wish to come back into the office.
- We now all work remotely with no office, which has had its challenges but also helped the company save money and build a new relationship with staff that offers them more flexibility.
- All staff had laptops / notebooks to use, and connections via VPN. We have also moved in the cloud fully during this time, and that has meant that we are well placed to work from home.
- We have operated entirely effectively working from home, but miss the spontaneity of personal interaction when together in the office.
- We were home workers anyway, but I'd say this period has made us communicate more with each other than before.
- Instigated lots of new processes, allowing for more working online and in the long-term outsourcing more work. Will take some time for this to bed in properly and be effective.
- Staff all adapted well to working at home—a rehearsal had taken place pre-lockdown to see what problems that may be encountered. Staff are communicating well and Zoom has been invaluable. Hired extra full-time staff to start catch-up on the conversion of the backlist (over 500 titles) into ebooks.
- Internet communication has been tense. On the other hand it has brought in some good practices such as video conferencing.
- Everything we do can be done online—it's been a very smooth transition and has actually been very beneficial for a number of staff who used to have long commutes. Many staff feel more productive and less stressed. Their work-life balance has improved considerably, which makes up for any loss of the social aspect of office working.
- Home working successful in terms of technology. But creates challenges in terms of staff needing access to physical equipment and other items, and storage of those items.
- In many ways Covid-19 has only served to speed up some of the technological advances that were already on the cards in terms of remote working and updating our IT infrastructure.
- Working from home has been very successful. In areas where this is not possible, shift work has also worked well keeping two teams separate.

- The running of the publishing programme day-to-day has worked extremely well online with everyone working from home. Some issues include lack of printing and scanning facilities, but majority of tasks are unaffected.
- Previously we were not set up for staff to work remotely from home. We were forced to create this option and it has been successful and useful.
- Organised working from home for all but three staff.
- As a very small business, we were lucky that all staff already worked from home, so the main change has been to virtual meetings rather than face-to-face.
- We were able to maintain productivity while moving to 100% remote working.
- Remote sharing of office computers combined with Slack and Zoom communications has worked for us, combined with social distancing of essential office workers.
- Everything has moved online and remote. Challenging, but we're getting used to it.
- The transition to home working was smooth and, having cloud based IT, it all worked well. All of the team stepped up really well. Those with young children at home coped admirably and there was a real 'can do' spirit.
- We have managed to get staff working from home more which has allowed us to downsize our office space.
- We have seen improvements in our internal communication through technology such as Slack and Zoom. We have refined a number of our processes.
- All working from home placing extra pressure on communications, typically handled well. Some challenges with sharing information. Finding ways to meet in person appropriately.
- Team have been fantastic. In the face of a lack of leadership from UK government, they have taken the initiative, moving to home working weeks before lockdown, moving back to homeworking days before government admitted this might be necessary.

### ... **On priorities for external support over the next six months**

- Finding more cost-effective sources of help.
- To try to understand what of the seemingly endless and confusing government initiatives we can take advantage of.
- Research and apply for any further grants that might help survival until summer 2021, when some small business may return.
- We are not looking for external financial support. I think our main priority will be to support independent booksellers where possible.
- Successful grants applications.
- We will be diversifying and as such using the government scheme to support new roles financially. Otherwise it's getting our heads down and working hard on the things we developed in the last six months.

- Copyeditors, typesetters and printers so that we can publish and start 2021 with a larger programme.
- We just need to sell, sell, sell and sell some more!
- Somehow getting enough income in with a reduced list and diminished sales.
- Hoping to utilise the government funding schemes as much as possible to retain our business working to the level we hope for going forward.
- We need a grant or loan to survive—or ideally investment from a new owner.
- No further collapse of HE Academic budgets!
- Understanding and finding a path through Brexit, and the potential supply chain, data security implications, as well as the knock-on effect on the wider economy and consumer confidence. Crucial we maintain trade as seamlessly as possible with European printers and customers.
- Electronic support.
- Doing whatever is possible to keep our staff safe and working, keeping bookshops open, and supporting the overall economy so that people still have money to buy books!
- We'll be looking to take a prudent approach over the coming months
- A national exhaustion regime once the transition agreement ends.
- Sustaining good mental health of staff. Making a big push in international licensing / export to mitigate awful home market given Covid restrictions.
- Merging with another independent publisher or retiring.
- We obtained a small micro grant from the city council and a small loan. Those are how we are still taking on new books, and printing existing titles.
- We are financially self-sufficient. We need to increase our marketing resources by using freelancers.
- Help with PAYE would be good.
- We are looking at the possibility of funding to take on an apprentice.
- Training on digital marketing.
- Staying on top of trends and utilising online channels as much as possible. We will be continually monitoring cashflow.
- We work with a partner in India, and consolidating and agreeing on new working practices is key.
- Find alternatives to stay connected to academics without visiting subject conferences.
- We have a fairly hefty Bounce Back loan already, so cash is taken care of (unless our sales plummet, of course, in which case repayments would be an issue).
- Keeping the company that reps for us alert to any sales opportunities, and moving some budget across to digital marketing since most sales are likely to be online.
- We will continue with our external consultant on user experience / digital marketing.
- Lots of projects that were on hold, plus marketing support.

- Information and insight.
- Commissioning new website which is extremely user friendly.
- No extra blows—ie no VAT on books, no increase in tax.
- Greater use of digital products.
- Consideration and grace period to be given for overstocks charges by distributors.
- Further government help for supporting existing employees, taking on new work placements, apprentices and employees and waiving / postponing tax payments. The key for ministers to understand is that fundamentally there is a vibrant future in our business, like many if not most other small presses, but we need extra help to get us through a difficult present trading environment.
- There does not seem to be any external support available. Staff are principals and working unpaid in launch of business. No government support schemes are applicable. No support available from Arts Council England. Either we make it through on the founders' cash or we shut up shop.
- Impact of Brexit!
- Making the case to our host organisation for extra support.
- Support regarding distribution.
- Increasing printer payment terms. Seeking out grants / funding.
- We expect to be able to trade without external financial support. Information and explanation of the latest directives will always be useful.
- Need to see what virtual Frankfurt achieves; will London go virtual next year? IPG, just keep up the good work as best you can!
- We will begin using more freelancers to support our marketing efforts.
- Extending furlough for staff servicing conferences.
- We are lucky that we are very niche and bookshops rarely stock us, so our channels of supply have mostly stayed open. We work closely with key figures and organisations in our field and feel confident that will see us through.
- Funding to hire excellent people.
- Beyond existing capex commitments we need to move to full cloud computing and being able to facilitate more remote working on a permanent basis. Financial support could really help our ability to remain competitive and to develop staff properly.
- We will apply for additional government support and look for grants.
- Expertise in product diversification to ensure our content is available to consume digitally—beyond the ebook and audiobook—as well as physically.
- Getting Brexit finalised: we all need to know what is actually happening, so we are not planning into a void.
- Providing our experience continues then we feel well placed to cope without external support. In the event of a sudden change, downturn and specifically if something should happen to impact our Amazon sales, then the picture could change very quickly. Support that is ready to adapt to changes is the key.

- Getting urgent reprints through and extending our strategy around digital products.
- We will continue to use freelancers to supplement us due to some restructuring due to maternity cover.
- I need a marketing assistant, but we can't yet afford to pay one. We're about to expand into Australia and New Zealand, which means extra print runs, and the cashflow will be alarming.
- The best support we could get is for the government to actually get a handle on this and provide consistent guidance and policy and get ahead of the curve. I have the greatest confidence in my team. It would be nice if the people running the country were as competent.
- Hope to get some funding.
- As usual, we lean heavily on our Arts Council funding, and ACE has been very helpful and responsive so far. We have not yet had to have recourse to other funders, though we did take a £50k Bounce Back loan.
- Cost-cutting.
- A better constructed replacement for furlough to enable short-time working rather than the current inadequate proposal.
- Supporting our book trade partners: reps, warehouse, wholesalers. The dominance of Amazon (whose ordering / availability of books is highly problematic) is greater than ever post-pandemic, and a big threat to a viable book trade.
- We have avoided the need for external finance so far but anticipate this is more likely to be required in future.
- We are investigating loans while cutting costs dramatically.
- Really need to get a Brexit deal!
- Raise cash so that I can get back to publishing. It is unlikely I will do any new books next year, as I have to sell stock and raise cash. If I could access a government grant then I can start growing again. No government programme seems to help my business model.
- Building a bigger and better direct to consumer system.
- Keep bricks and mortar retailers open.