

Nielsen
BookData

Pandemic Book Market trends

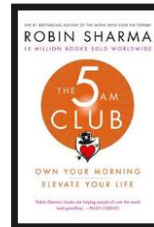
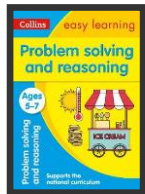
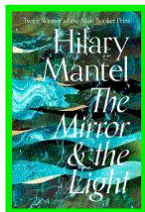
Andre Breedt



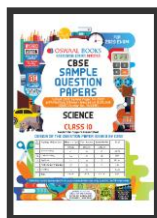
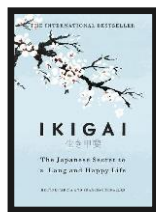




In many territories the start of 2020 behaved normally

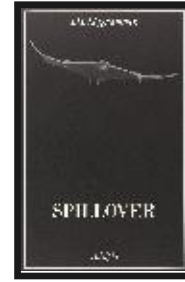


- UK & Ireland – self help and cooking and Fiction, particularly Hardback
- Spain & Italy – Fiction dominated, some translated – boost in sales
- India & South Africa – self help, no-nonsense and more nurturing books
- Australia & New Zealand – plenty of children’s, home-grown non-fiction, Fiction
- Brazil & Mexico – Non fiction, social media influencers, backlist

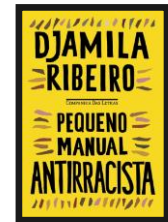
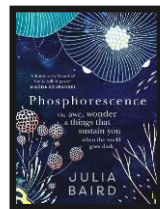
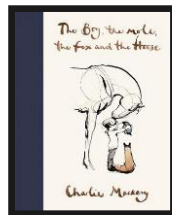
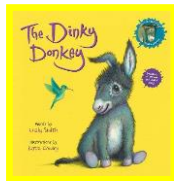
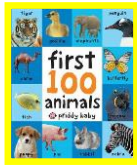




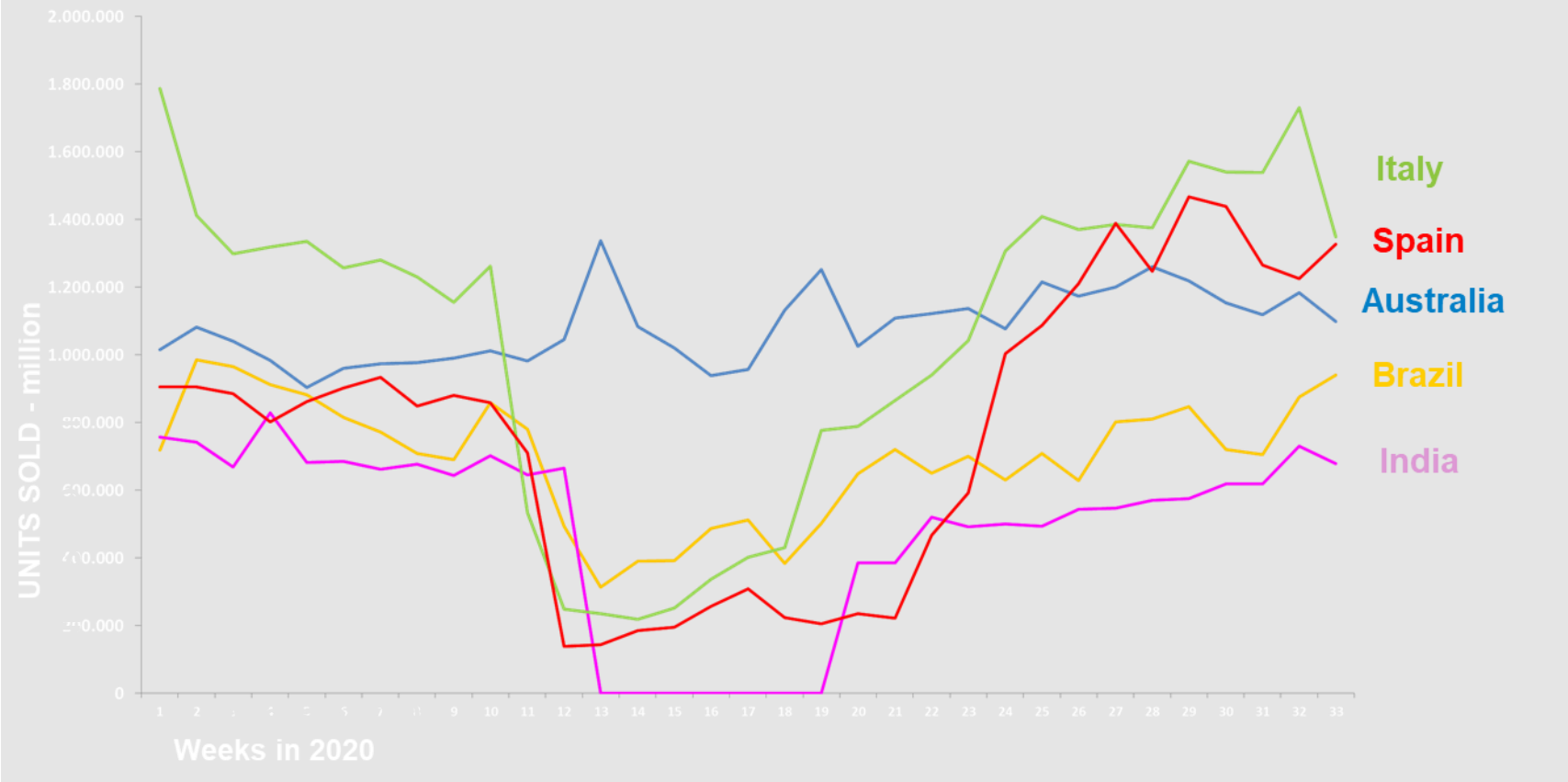
March – June was the period most hardest hit



- In all territories physical shops were impacted - closed or reduced footfall
- Online channels did not continue to operate in all territories
- Postponement of publication dates, in the UK 4000 less titles released in April
- In some territories consumers turned to fiction, in others non fiction
- Broadly speaking children's education and/or entertainment did well



The pandemic impacted countries in different ways

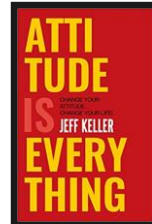
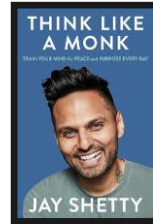
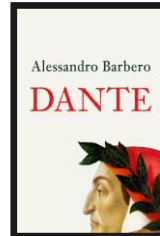
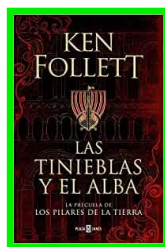
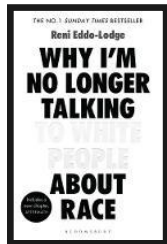




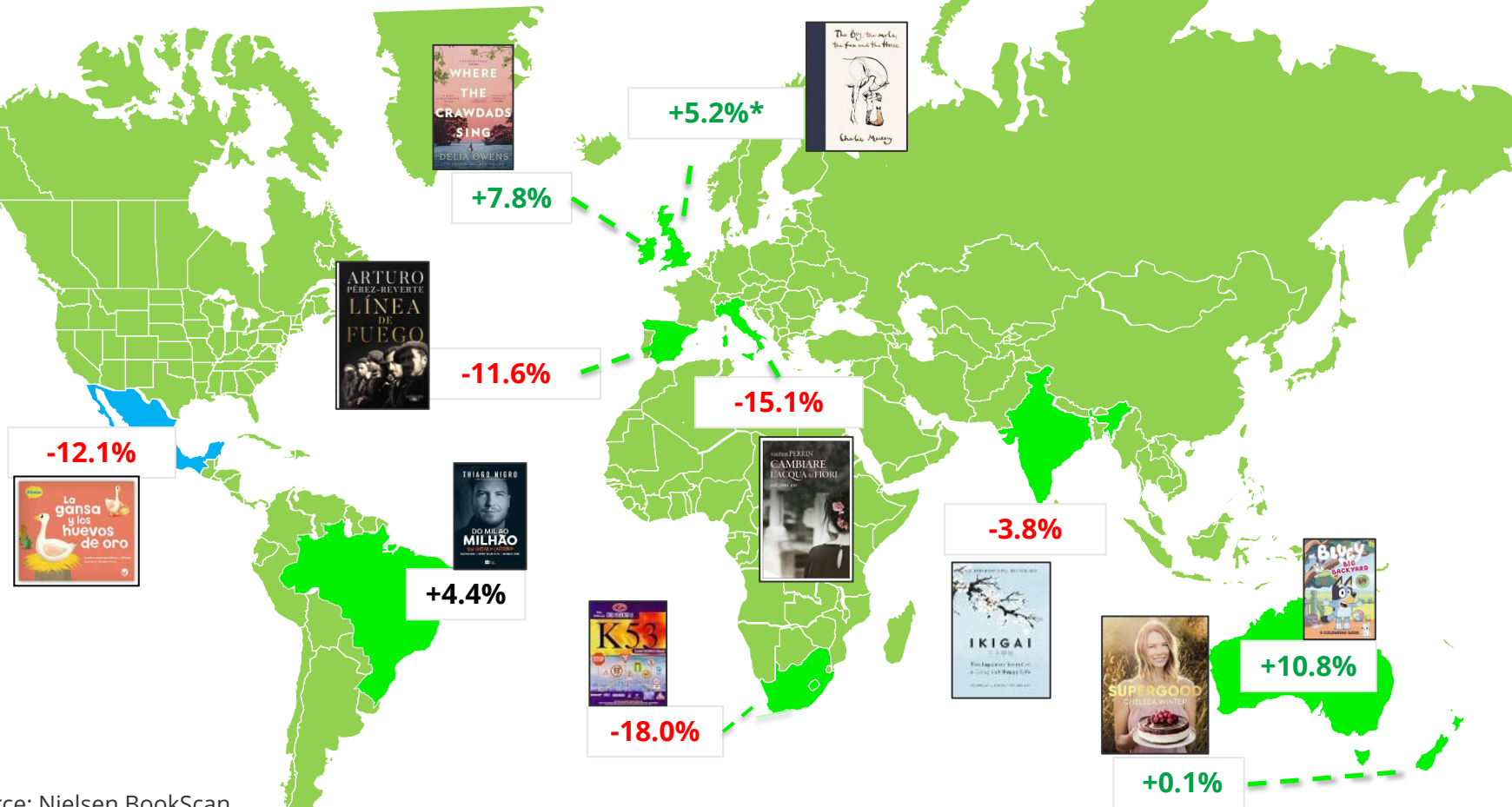
In summer – shops reopen, consumers enter physical stores, but lockdowns continue

The NEW NORMAL?

- Some post-lockdown booms occurred
- Children's book sales stopped being so education focused
- Normal patterns were seen with promotions driving sales in some countries

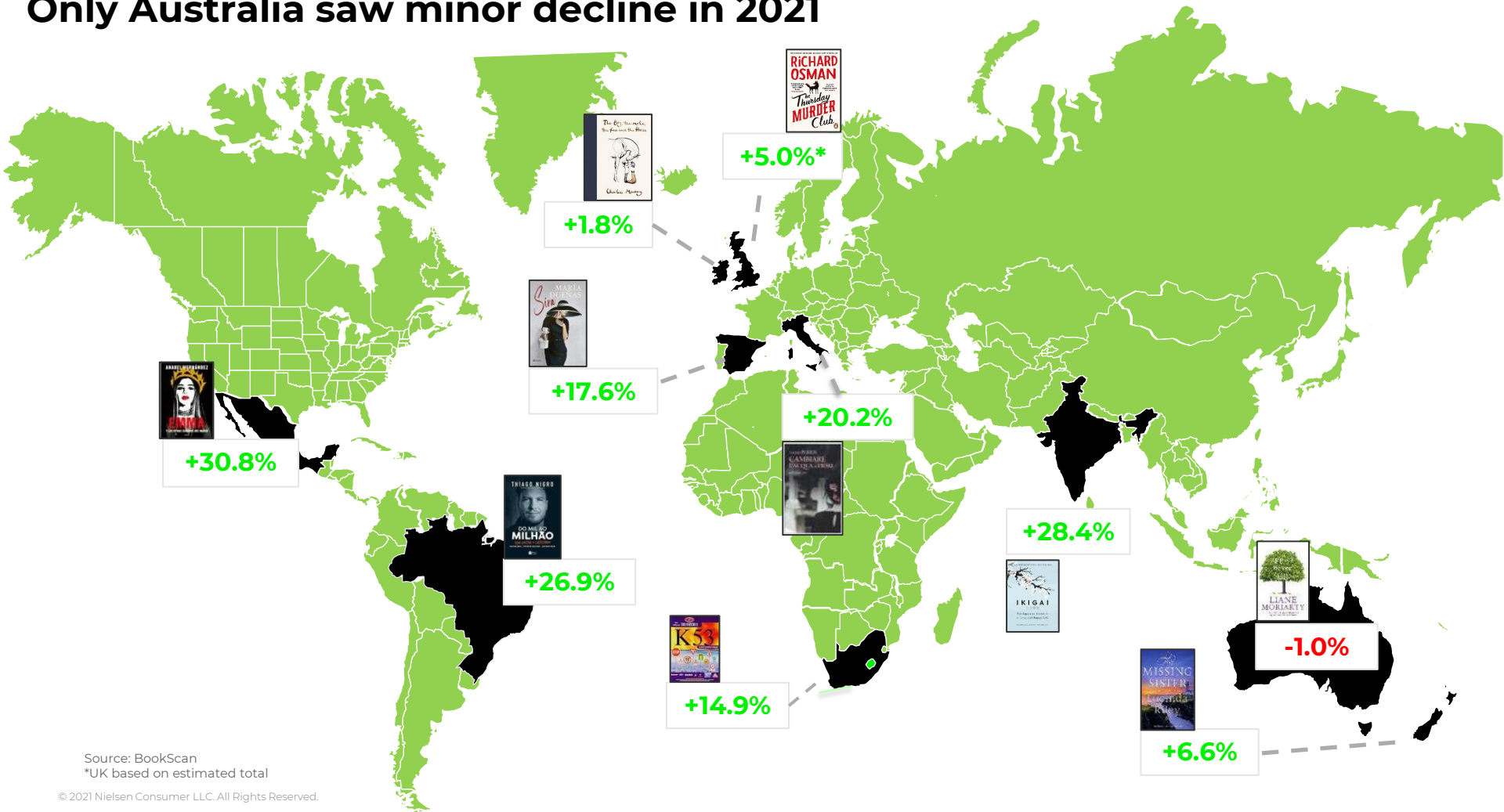


510m books measured across ten countries in 2020



Source: Nielsen BookScan
*UK based on estimated total

Only Australia saw minor decline in 2021



Source: BookScan
*UK based on estimated total

3 Recovery trajectories, will evolve amidst moving mindsets and priorities



Living with no fear

Industry impact

- OOH consumption recovers - FMCG plateau
- At home consumption declines
- Physical stores relevant
- Online growth slows
- Less constrained consumers



Living with some caution

- At home consumption continues - FMCG grows from ingrained habits
- Increased constrained behavior
- At home grows
- Online growth continues current trajectory



Living with strict vigilance

- At home consumption grows - Redirected spend into FMCG maintains momentum
- Increased constrained behavior
- Online growth accelerates

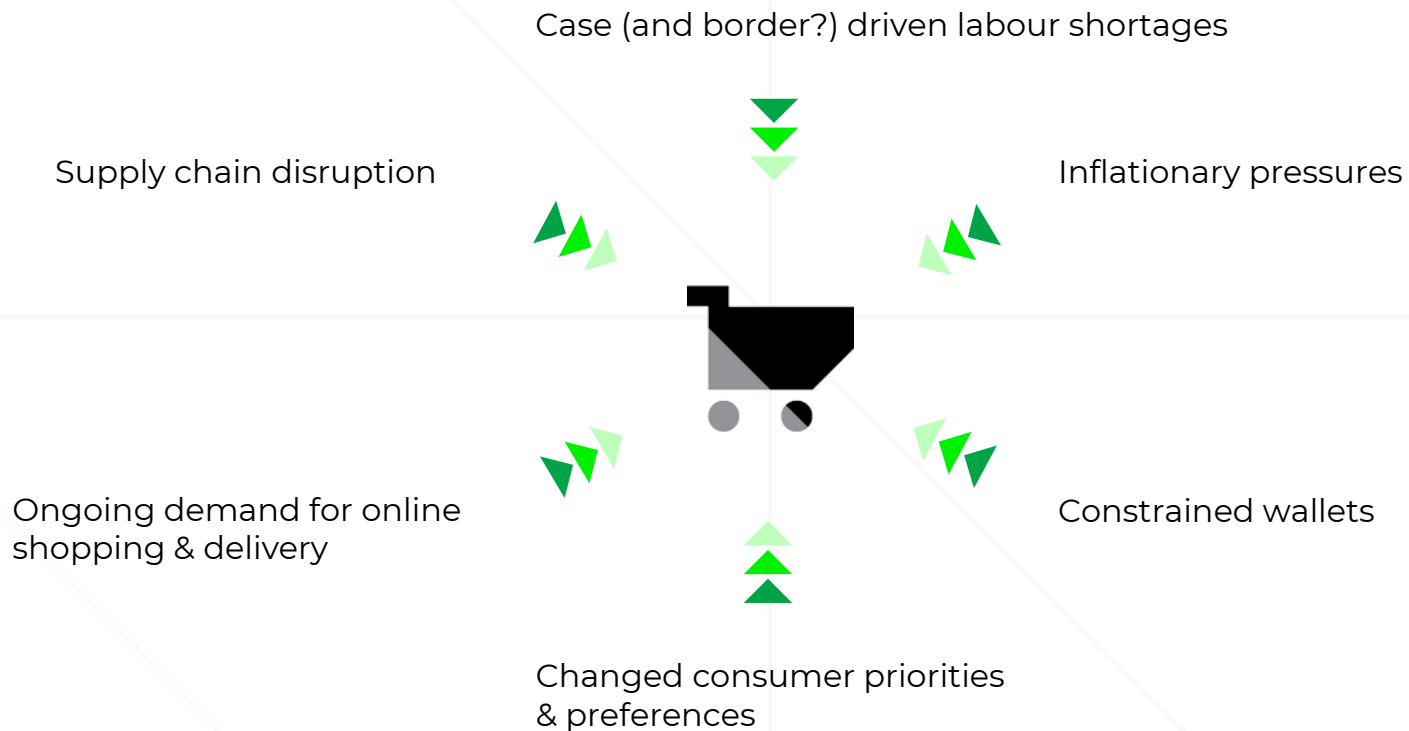
Consumer impact - Changing spend, priorities & preferences

- In store preference
- Seek excitement and new things
- Getting bored and find it hard to stay healthy
- Want to get back out there

- Ongoing compromise between each end of spectrum
- Considered behavior but focus on mental wellness and importance of socializing with family /friends
- Value and affordability (central to all)

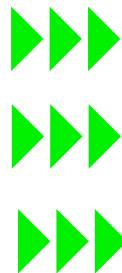
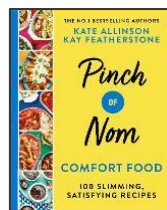
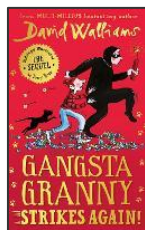
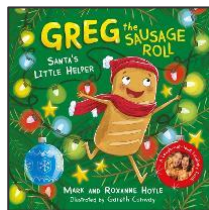
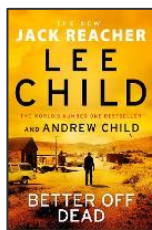
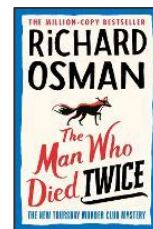
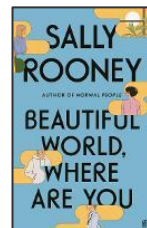
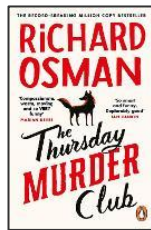
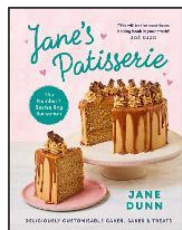
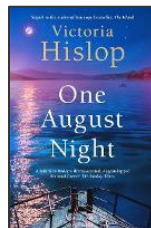
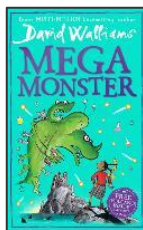
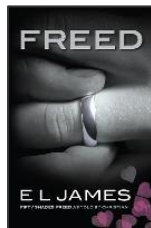
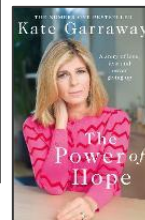
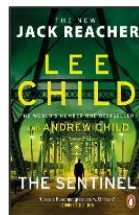
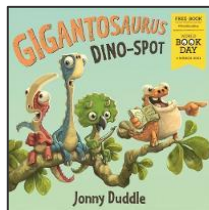
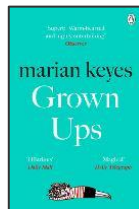
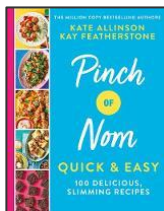
- Health & hygiene hyper vigilance
- Trying to live a healthier lifestyle; more discerning about what they eat
- More homebound behaviors
 - more chores; cook meals differently; eat leftovers; compost more
- Shop at local neighborhood stores
- Shop online to limit exposure

Ongoing pressures facing retail landscape of 2022



Fiction takes the lead for weekly number ones

23 #1 books in 52 weeks



26 weeks led by Adult Fiction



10 weeks led by Children's Fiction



18 weeks led by Crime & Thriller



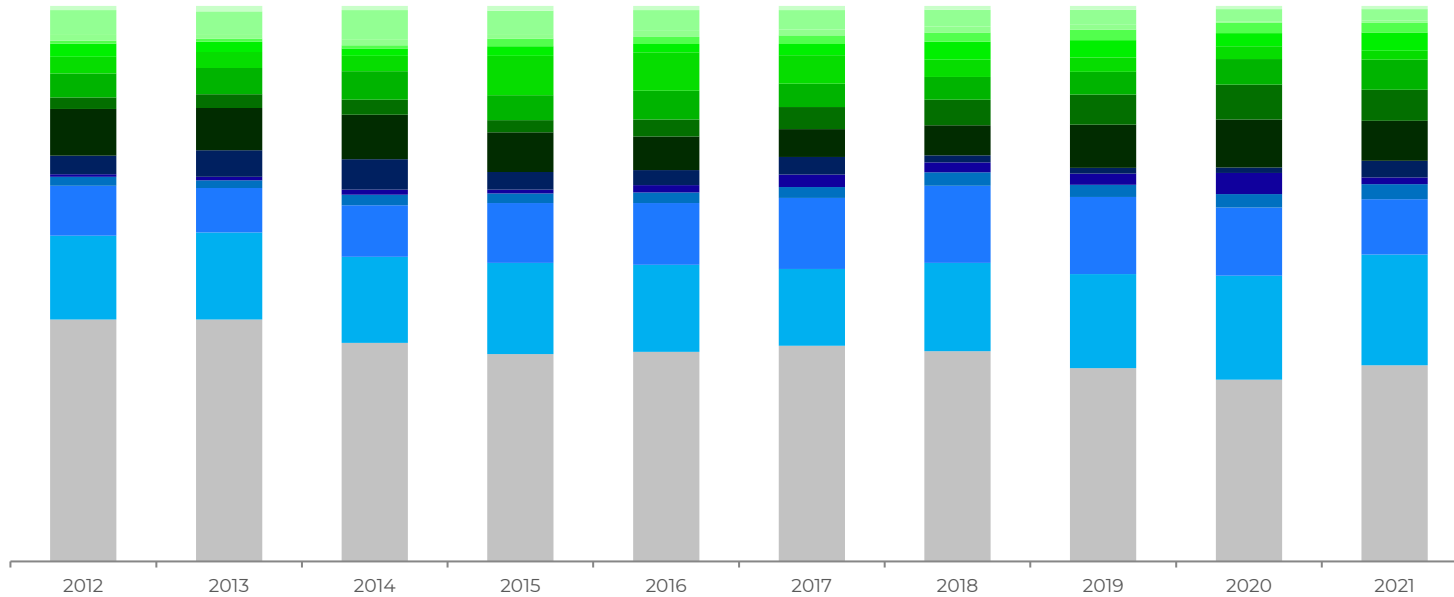
10 weeks led by Food & Drink



12 weeks led by Richard Osman

Fiction and YA with gains at top end of the chart

Top 1000 ISBNs each year split by type of book

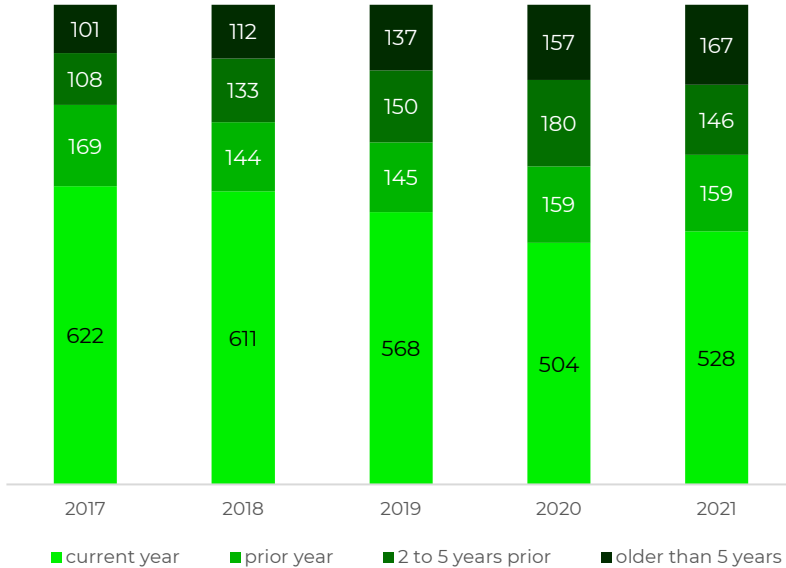


- Adult Fiction
- Children's Non-Fiction
- Biographies, memoirs, true stories
- Humour, hobbies, leisure, travel
- Art, poetry, anthologies
- Pre-School & Picture Books
- Children's school/home learning
- Personal development, MBS, family & health
- Politics, current affairs, history, business
- Annuals
- Children's Fiction
- YA Fiction
- Food & Drink
- Science & nature
- Manuals, guides, dictionaries

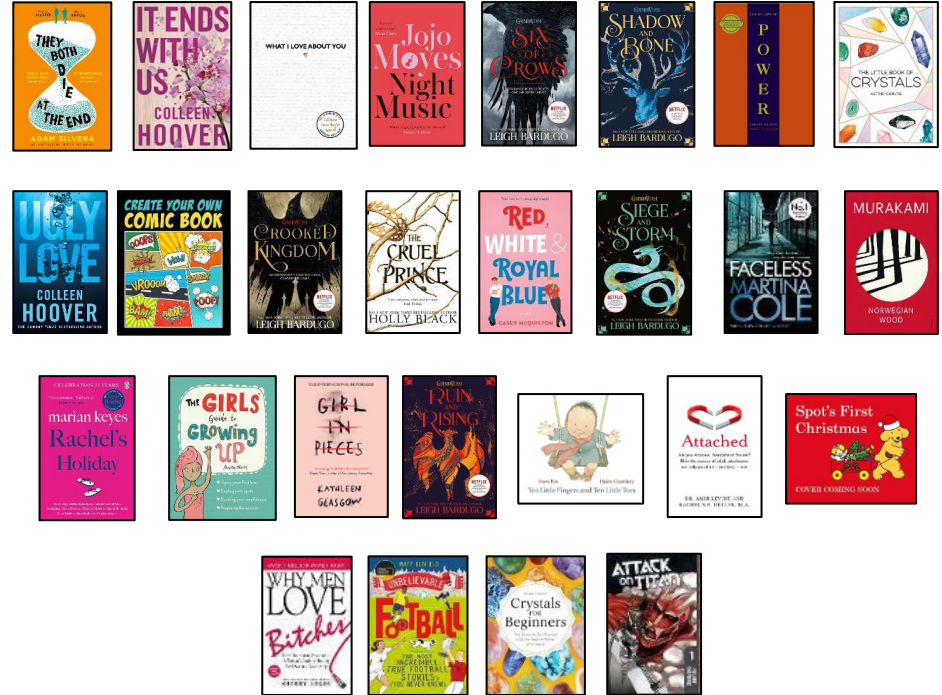


Backlist books boosted up the charts

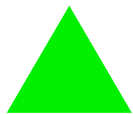
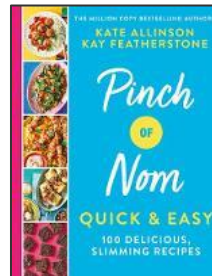
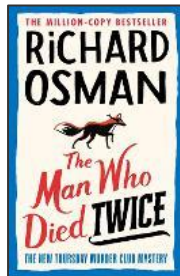
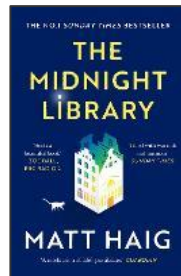
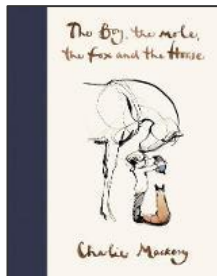
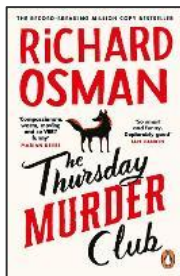
ISBN count in top 1000 by pub year



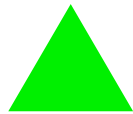
Books published pre-2020, first time in top 1000



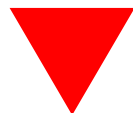
Another year of growth for the UK print book market*



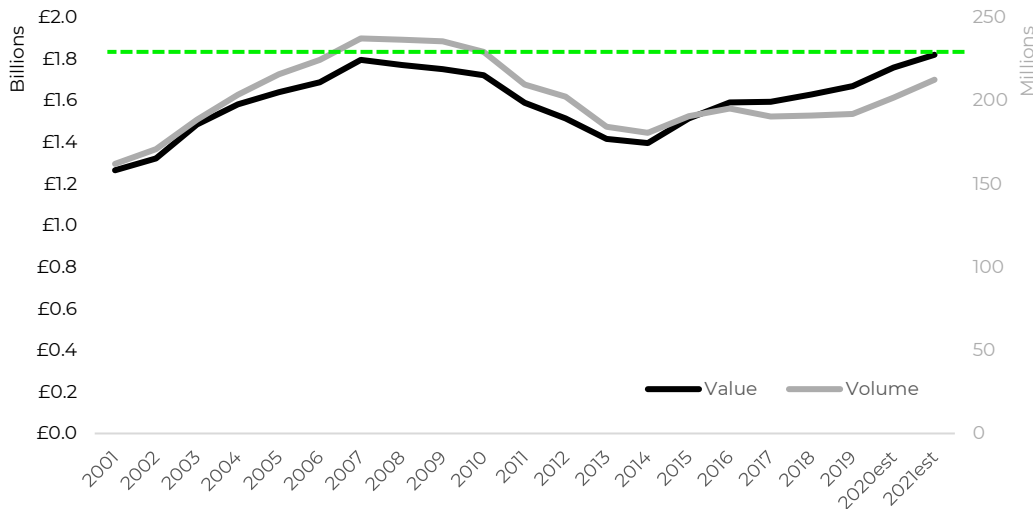
213m books
above 2011-2020



£1.82bn spent
highest ever

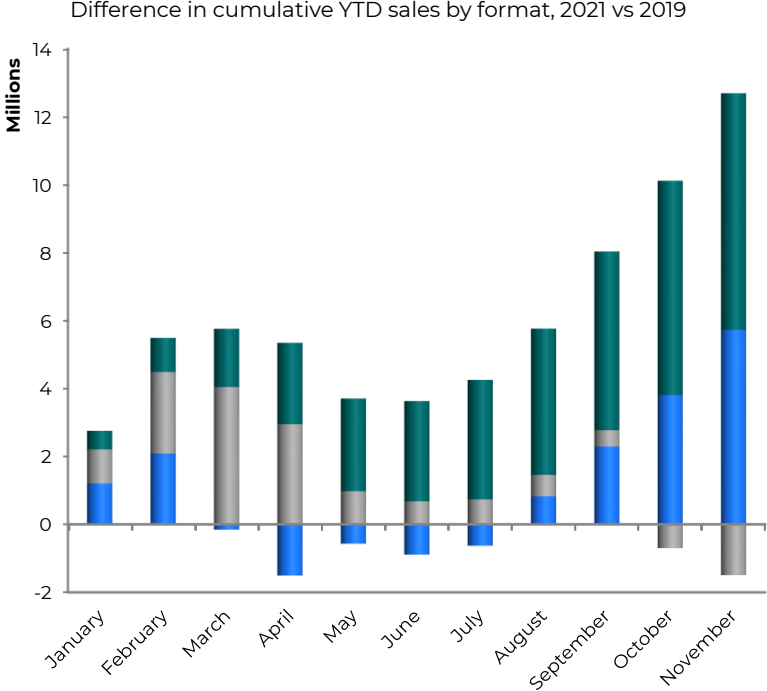
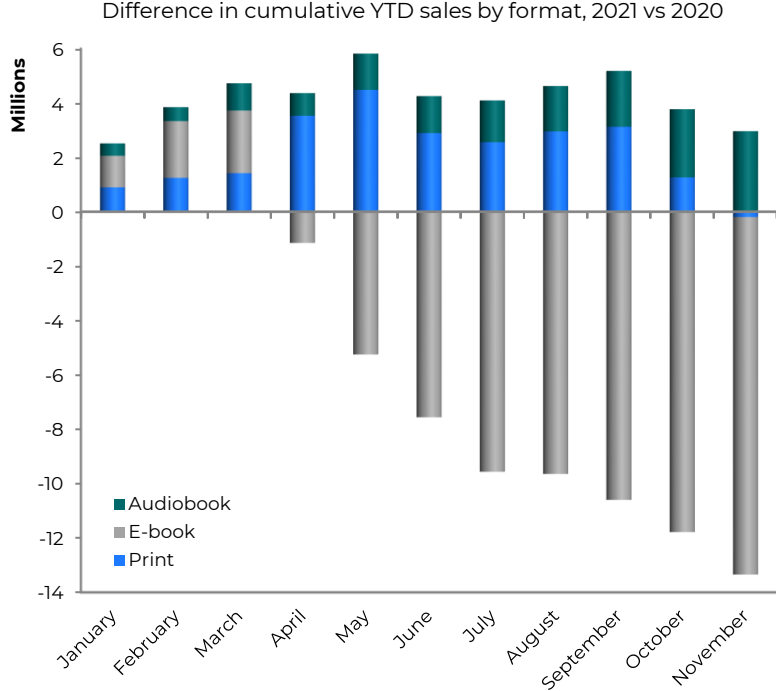


£8.57 avg price
third highest on record



Source: BookScan

E-books tracking down since April but audio up all year



Source: Books & Consumers

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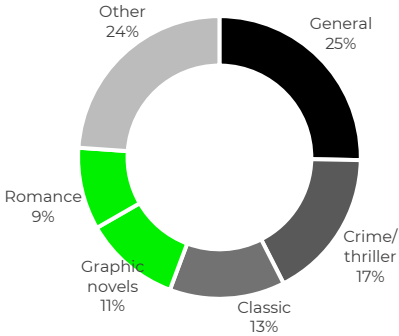
How are 13-24s and 60-84s shopping?

13-24s bought **2.0m**
more Fiction print books.

19% share of fiction print market.

60-84s bought **2.0m**
more Fiction print books.

26% share of fiction print market.



Discovery

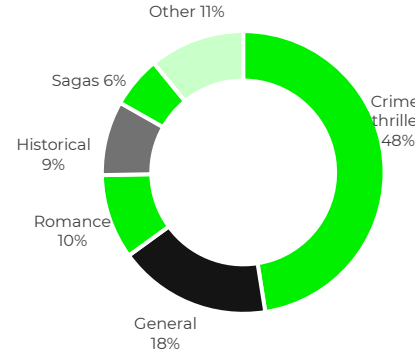
- 26%** read author/series/book before
- 18%** physical shop
- 14%** friend/relative/colleague
- 14%** film/tv adaptation
- 13%** author website/interview/event
- 11%** place of study/work
- 10%** bestseller list

- 6%** social network site
- 5%** video sharing site



Purchase influences

- 26%** subject
- 21%** blurb
- 20%** author



Discovery

- 47%** read author/series/book before
- 24%** physical shop
- 12%** bookseller site/email
- 12%** author website/interview/event
- 10%** friend/relative/colleague

- 6%** bestseller list



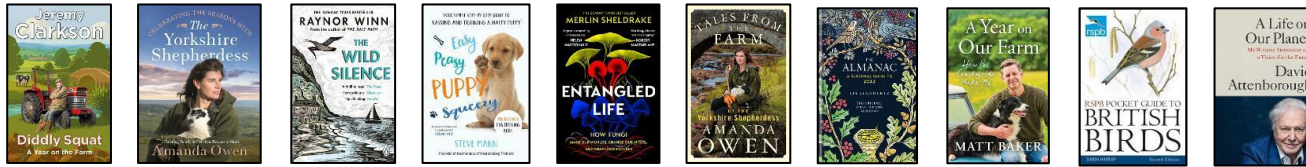
Purchase influences

- 44%** author
- 25%** blurb
- 25%** subject
- 23%** series
- 21%** price/offer

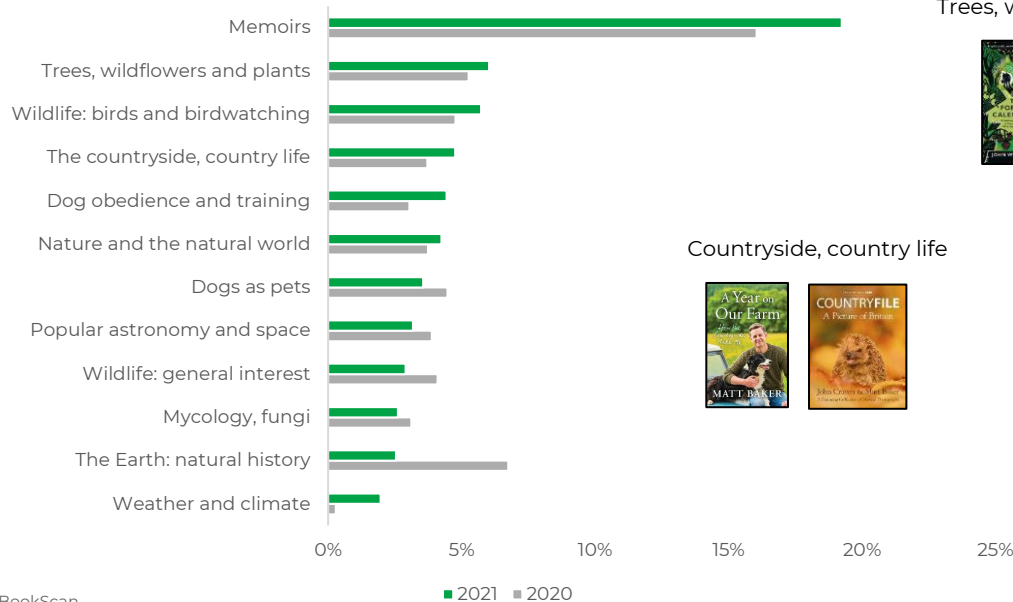
- 41%** e-tailers
- 40%** bookshops
- 8%** supermarkets

- 42%** e-tailers
- 33%** bookshops
- 19%** supermarkets

6% of Trade Non-Fiction has to do with nature



Primary Thema code for books with natural world codes, value share



Trees, wildflowers, plants



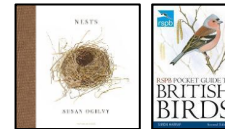
Nature & natural world



Countryside, country life



Birds & birdwatching



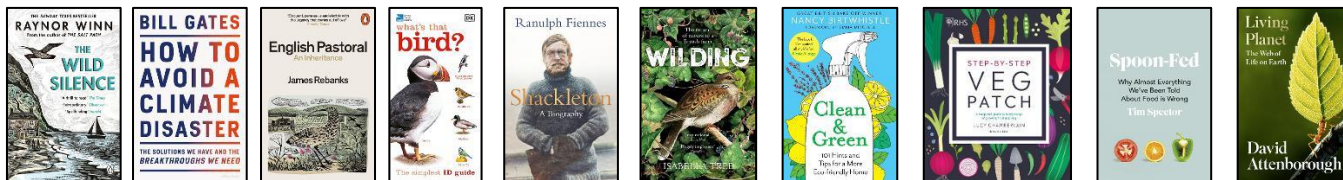
Dog obedience & training



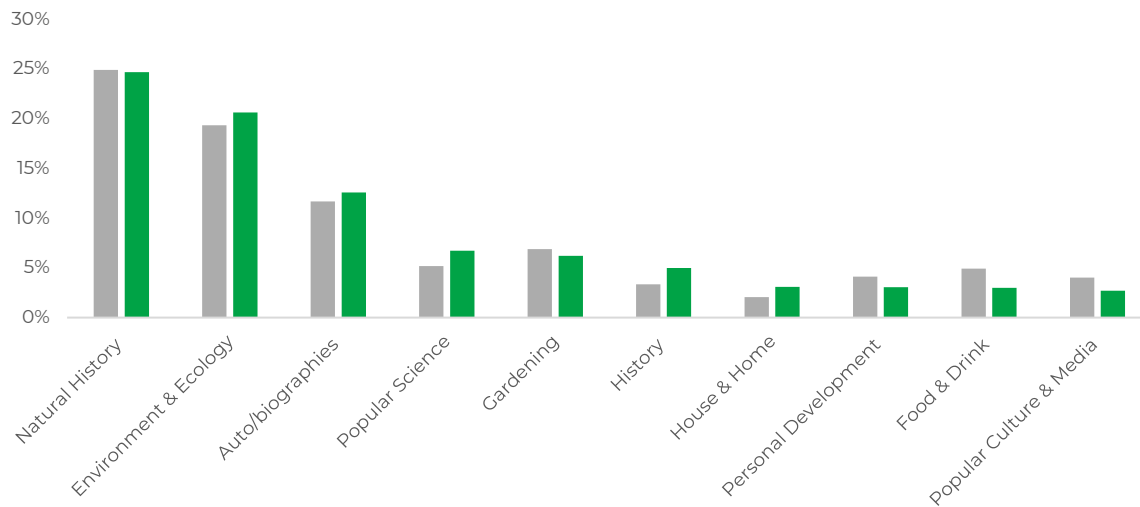
27% of sales from memoir/biography

11% crossover with personal development/health

Many nature books cross over into environmentalism



Value share of books with environment/sustainability codes

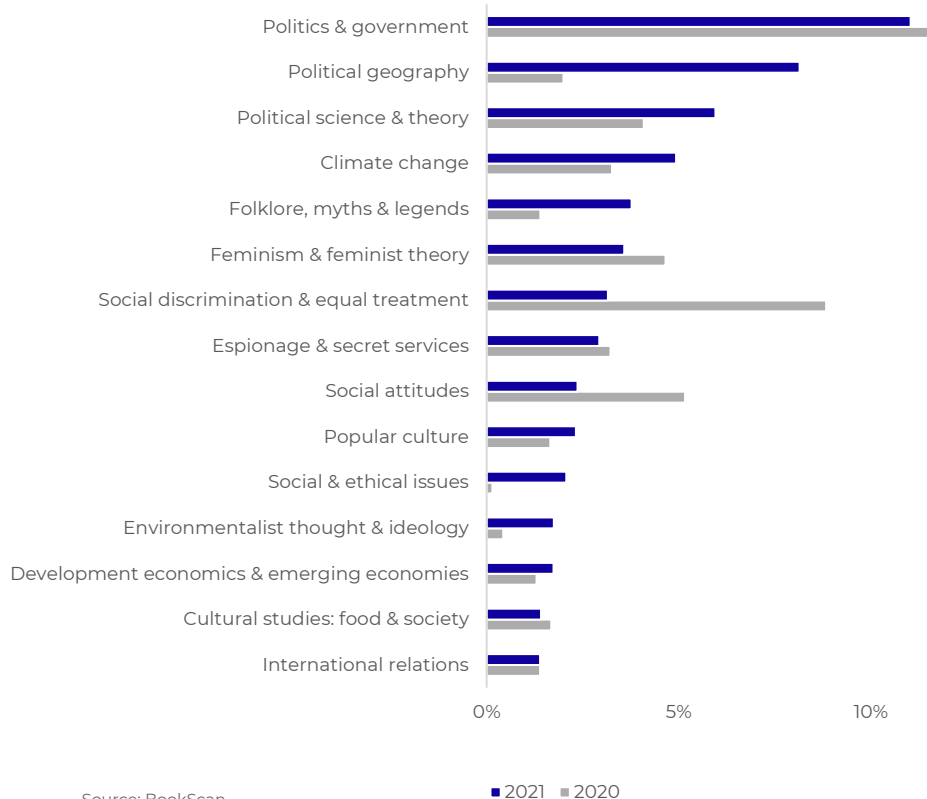


Source: BookScan

■ 2020 ■ 2021

How does the environment fit with other current affairs & culture?

Primary Thema code in Politics & Government, Environment & Ecology, Popular Culture & Media, Inventions & Technology, value share



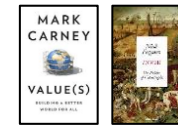
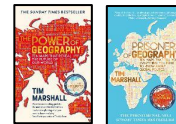
Top books:



Political science

Political geography

Climate change



Folklore & myths



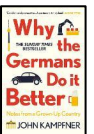
Social & ethical issues



Environmentalist thought



Development economics

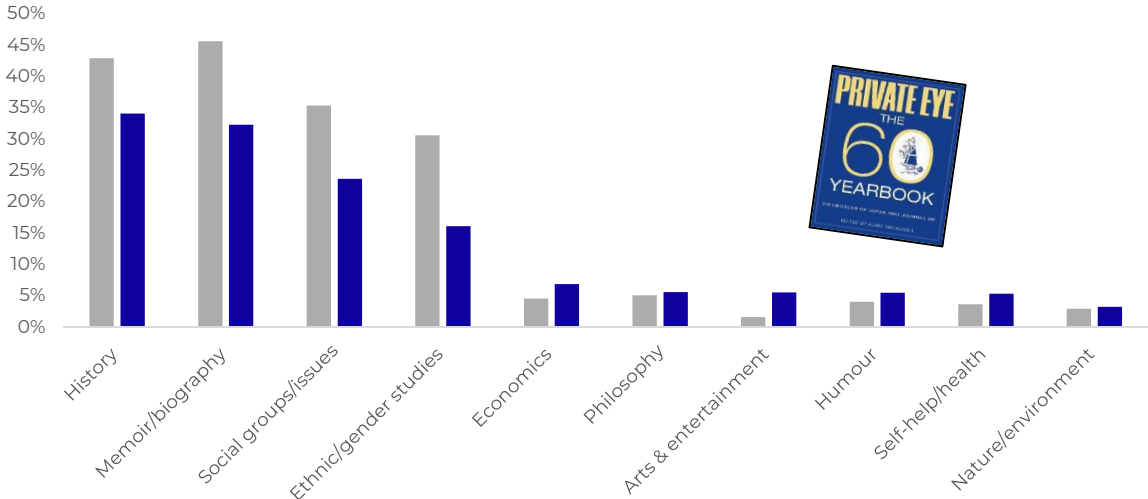


Source: BookScan

Economics and philosophy gaining across any books to do with politics

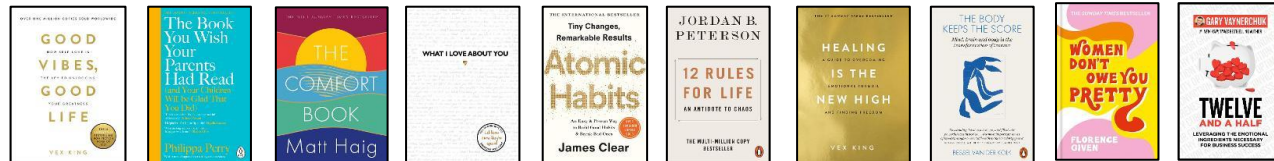
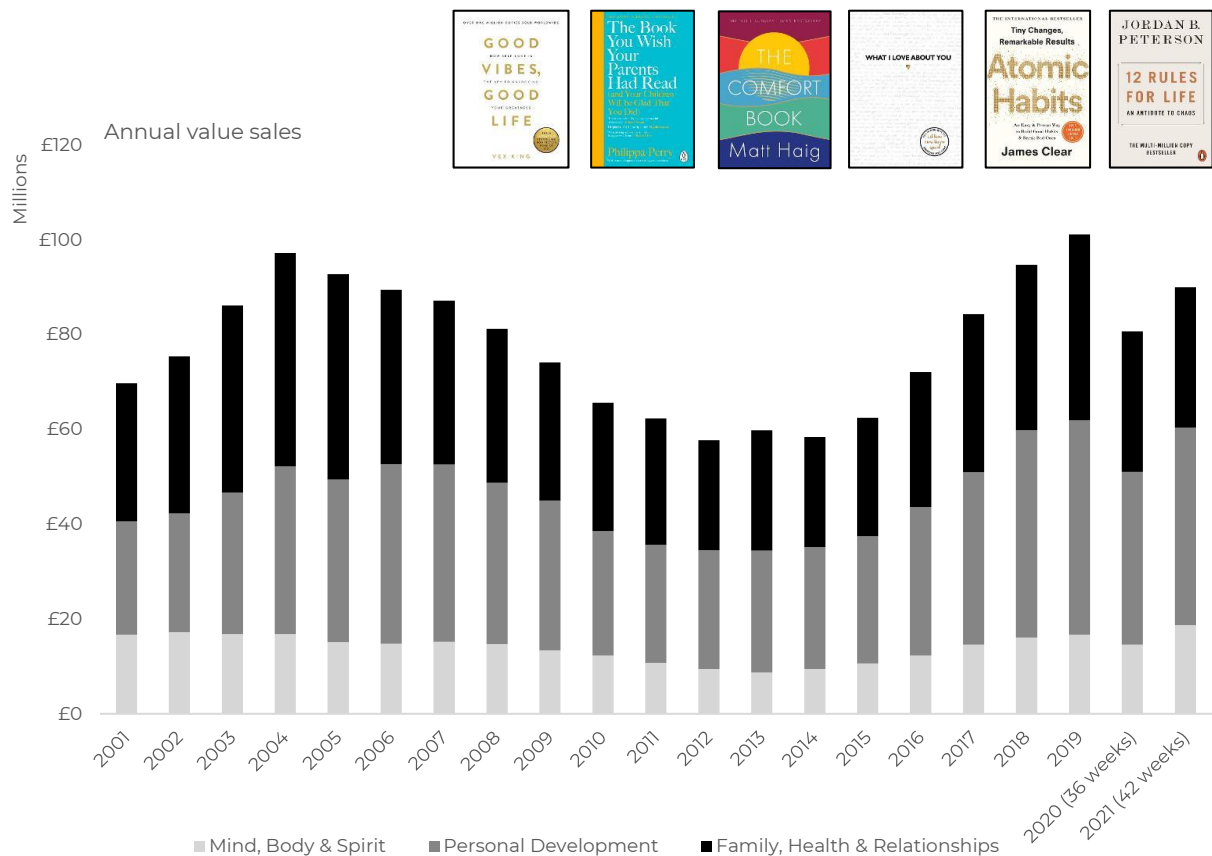


Value share of books with politics codes



Source: BookScan

Self-help/MBS books set new lifetime high



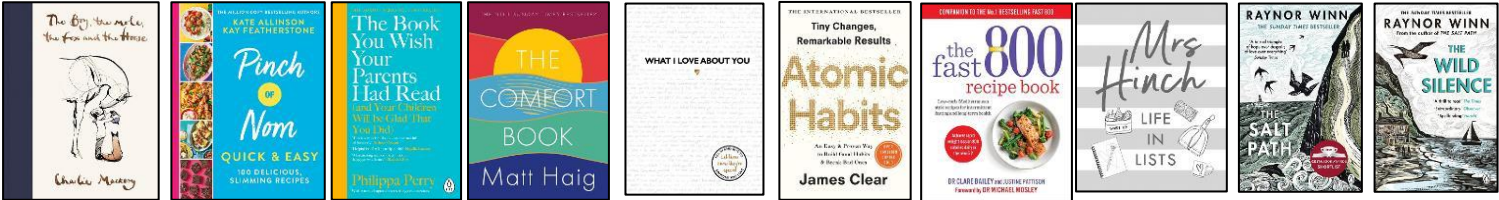
£90m spent on combined categories, only £10m behind full-year 2019.

Highest year for Self Improvement even without first ten weeks.

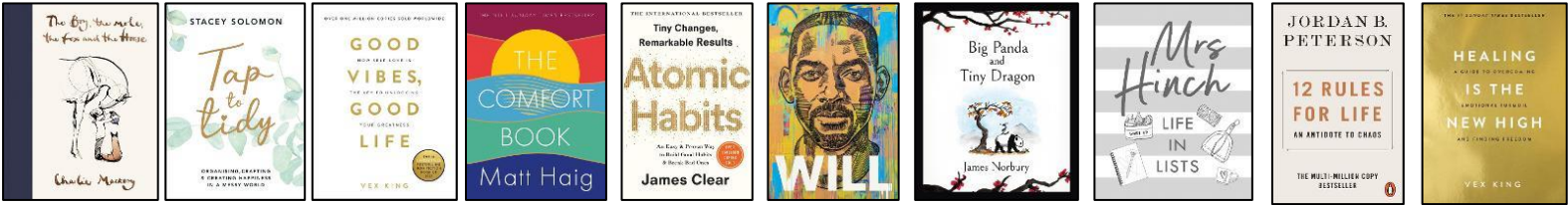
Highest year for overall Mind, Body & Spirit, even without first ten weeks

23% of Trade Non-Fiction comes from self-help/MBS/health books

13% market share for family & health



11% market share for personal development



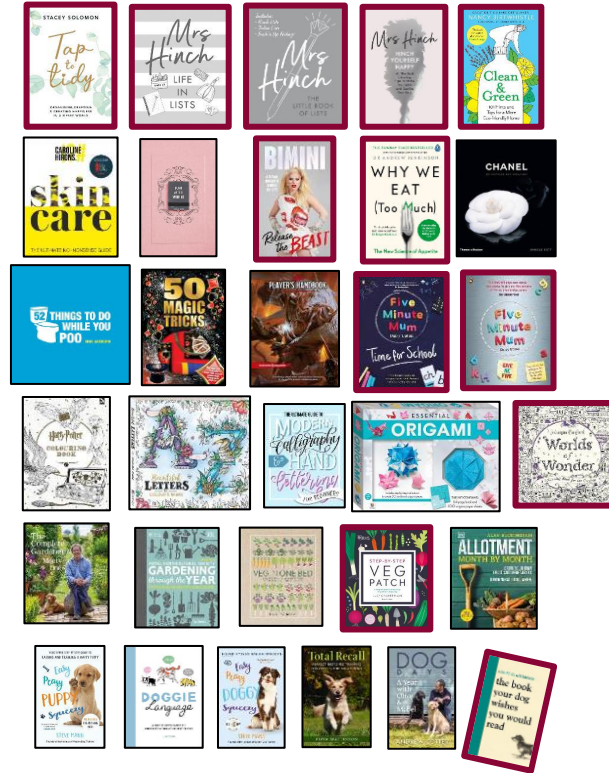
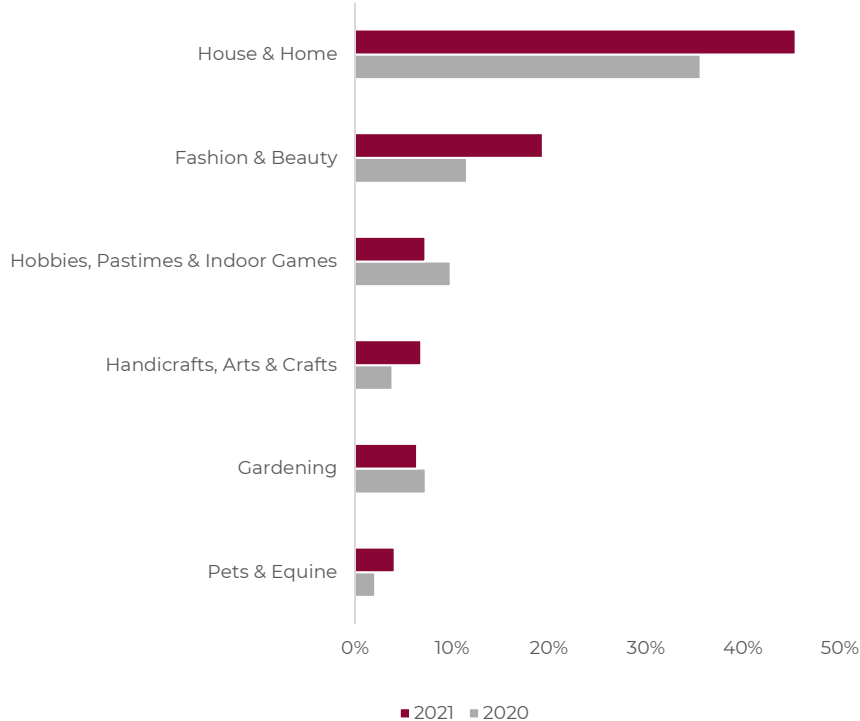
6% market share for mind, body & spirit



Source: BookScan

Personal development growing within Leisure & Lifestyle books

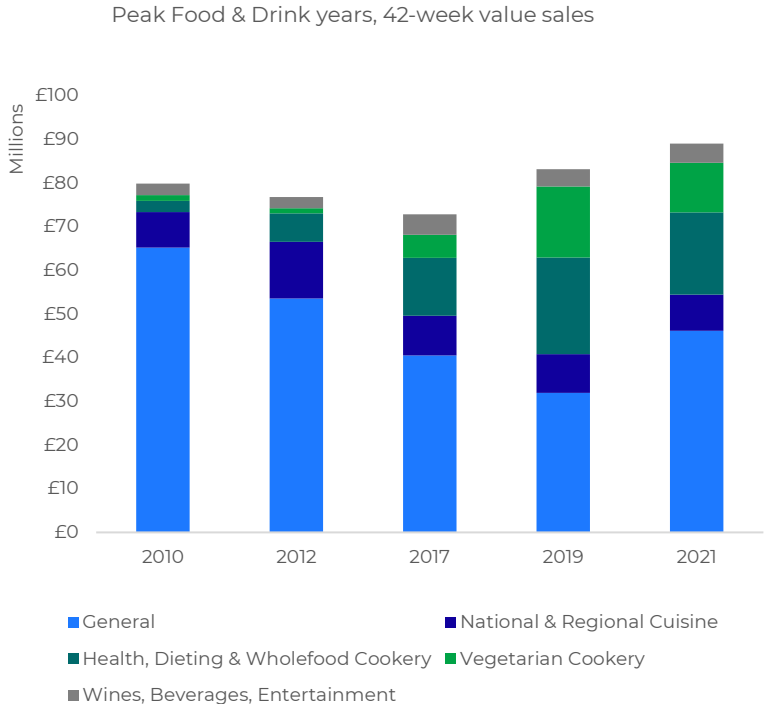
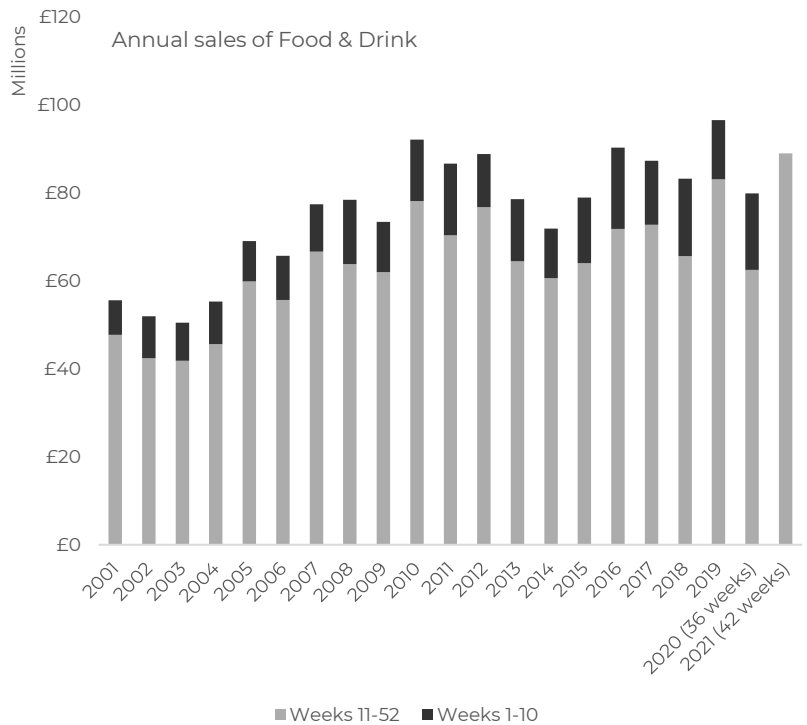
Personal development codes value share of Leisure & Lifestyle categories



Thema that gained in Leisure & Lifestyle:

- Gardening
- Journals
- Adult colouring
- Crochet
- Dogs
- Interior design/ feng shui
- Home renovation/ architecture

Record year for Food & Drink, thanks to increasing variety in sector



Source: BookScan

Thank you