

U.S. Book Industry Trends and Insights

SEPA 2021 Summit

November 2021

Copyright 2020. The NPD Group, Inc. All Rights Reserved.
This presentation is **proprietary and confidential** and may not be disclosed in any manner, in whole or in part, to any third party without the express written consent of NPD.





KRISTEN MCLEAN

Executive Director, Industry Analyst
kristen.mclean@npd.com

About Us

EXPERTISE IN MORE THAN 20 INDUSTRIES

POINT-OF-SALE DATA FROM OVER
600,000 retail locations,
PLUS E-COMMERCE AND
MOBILE PLATFORMS

MORE THAN **2,000** OF THE
WORLD'S LEADING BRANDS AND
RETAILERS ARE NPD CLIENTS

Millions of receipts
FROM BRICK-AND-MORTAR
AND E-COMMERCE
(CHECKOUT)

MORE THAN **8 million**
CONSUMER SURVEYS
CONDUCTED ANNUALLY

SERVICES IN 19 COUNTRIES

IN THE AMERICAS, EUROPE, AND ASIA-PACIFIC



FOUNDED IN
1966

1600+ EMPLOYEES WORLDWIDE

**We combine data, industry expertise, and prescriptive analytics
to help our clients grow their business in a changing world.**



Industries We Track at NPD



Apparel
Appliances
Automotive
B2B Technology
Beauty
Books
Consumer Technology
E-commerce
Fashion Accessories
Food Consumption
Foodservice

Footwear
Home
Home Improvement
Juvenile Products
Media Entertainment
Mobile
Office Supplies
Retail
Sports
Toys
Video Games

BookScan's Retail Panel

- Amazon.com
- Babies "R" Us
- Barbara's Bookstores
- Barnes & Noble*
- BakerBookHouse.com
- BJs
- Bloomingdale's*
- Bodhi Tree
- Books-A-Million*
- Book-Pal.com
- Boscov's*
- CatholicCompany.com
- CEORead.com
- CNI
- Cokesbury.com
- Cornerstone
- Costco
- DaveRamsey.com
- Deseret Book Company*
- Family Christian
- Follett Stores
- Givingtons.com
- Hastings
- Home Shopping Network
- Hudson Group
- Hyvee.com
- K-Mart
- Lifeway
- Macy's**
- Magnolia.com
- Mardel

- Meijer
- MicahTek, Inc.
- Michaels*
- MusicToday.com
- Navy Exchange*
- Nordstrom*
- Office Depot*
- Peebles
- Powells.com
- Premiere Collectibles
- Quarterly.com
- QVC
- RabbitRoom.com
- RevDistribution.com
- Sam's Club
- Seagull Books
- ShopKo
- ShopRite
- Stage Stores
- Starbucks
- Stop & Shop
- SuperValu
- Target*
- TheBookCo.com
- The Container Store
- Toys "R" Us
- Transworld
- Walmart*
- Wegmans
- Independents (1,500) – partially weighted
- Christian Independents (275)

Added Since 2020

- Aerio
- Bed Bath and Beyond
- Bass Pro Shops
- Bloomingdales
- Bookshop.org
- Boscov's
- BuyBuy Baby
- Cabela's
- Comic Hub (100+)
- Fleet Farm
- Kohl's
- Learning Express
- Michael's
- Nordstrom
- Office Depot
- PuppyDogsandIceCream.com
- REI
- Stellar Airport Stores
- Zulily

* Includes .com

We have partnerships
with over

**900+ book
retailers**

in the U.S. covering

85%

of the
print book market.

Sources for Today's Data

NPD Book is the market leader in US Book data



NPD BOOKSCAN™

Print book POS

16,000 retailers

13M units weekly

85% of US market



PUBTRACK DIGITAL

eBook sales

Publisher reported

Top 450 publishers

Monthly release



PUBTRACK DIGITAL AUDIO (beta)

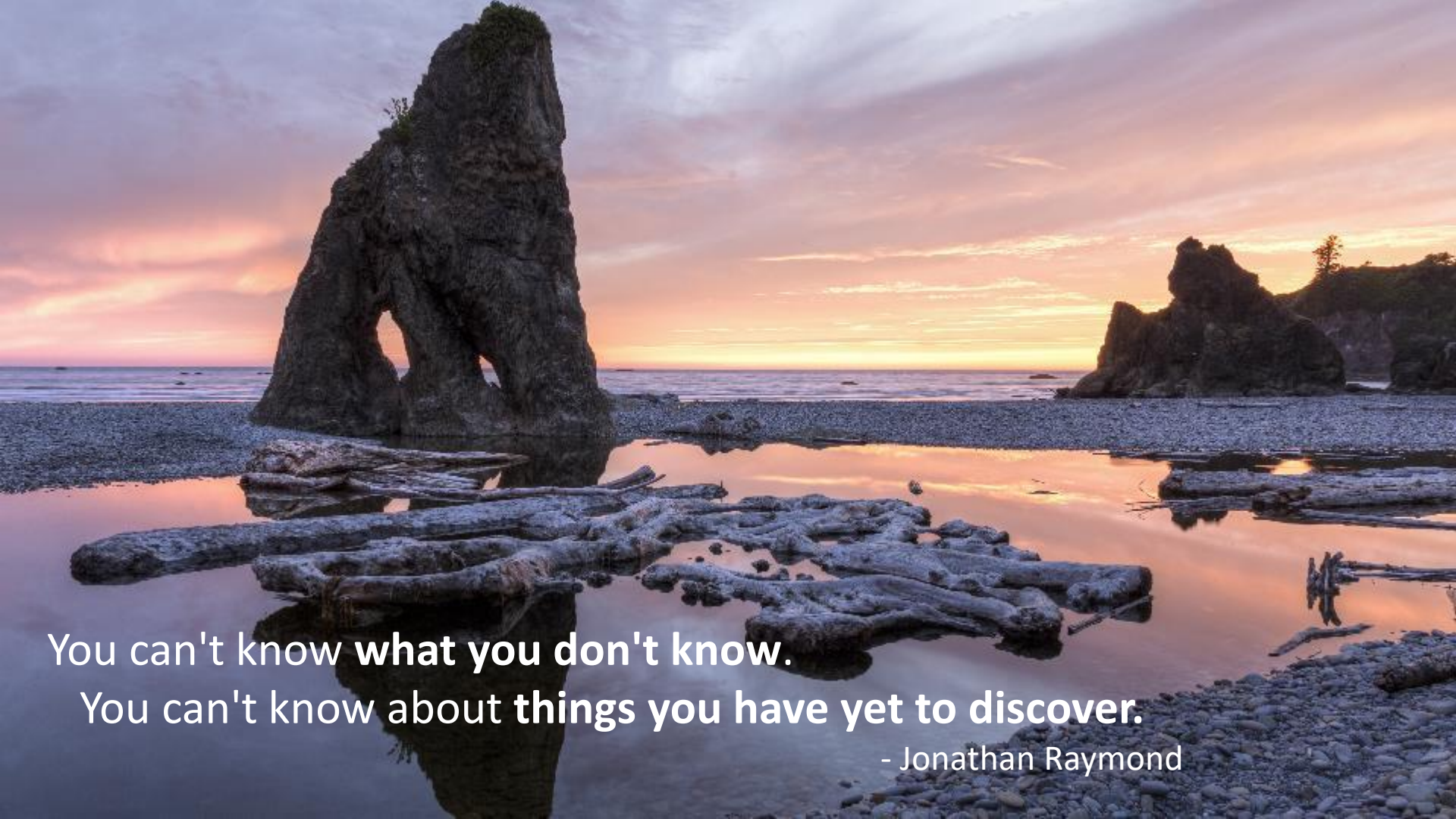
Digital Audio sales

Publisher reported

4-of-5 Top Audio publishers

Monthly release





You can't know **what you don't know.**

You can't know about **things you have yet to discover.**

- Jonathan Raymond

Agenda

1. Overall U.S. Book Market Performance
2. Spanish Language Book Trends in the U.S.
3. U.S. Christian Book Market Performance
4. Trends in U.S. Christian Kids' Books
5. Takeaways

The background of the slide features a stack of books on the left and an open book on the right, with a pair of glasses resting on the surface in front of them. The entire image is overlaid with a semi-transparent blue filter.

OVERALL U.S. BOOK MARKET PERFORMANCE

Rock **steady** at the top



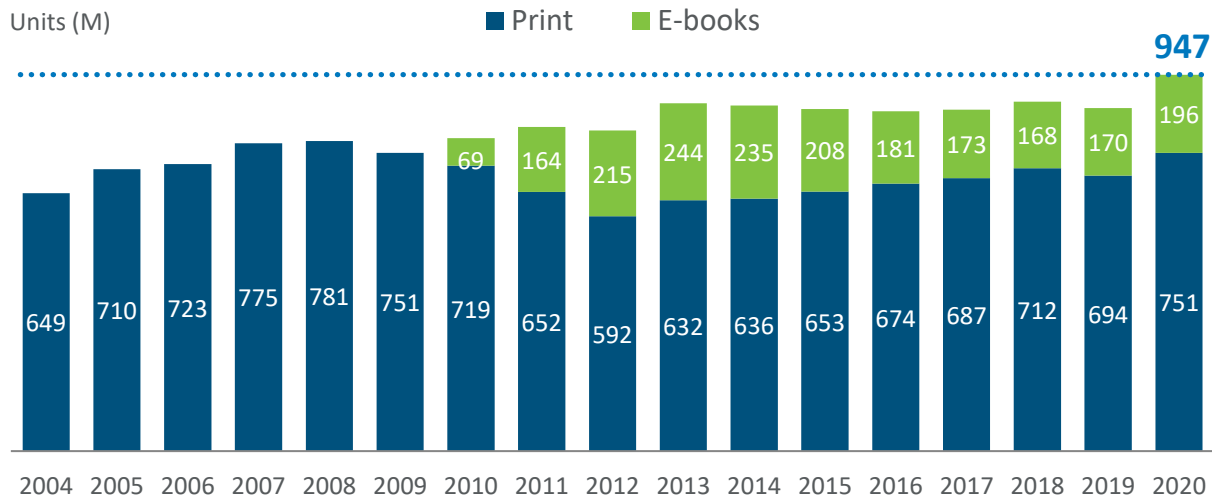
Volatile underneath

The U.S. Book market hits a new level

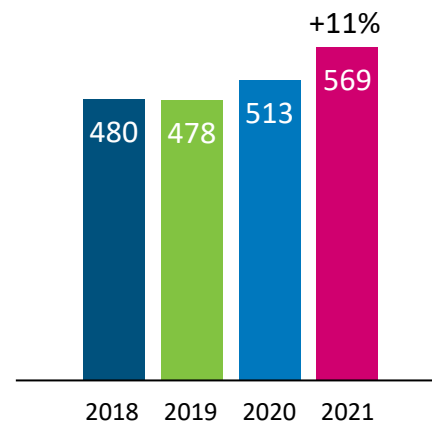


2020 was the highest year on record, and 2021 looks like it will finish even higher.

16-Year Trend – US Book Market



YTD Print Sales



Source: The NPD Group/NPD BookScan, NPD PubTrack Digital, YTD thru WE 10-2-21-21



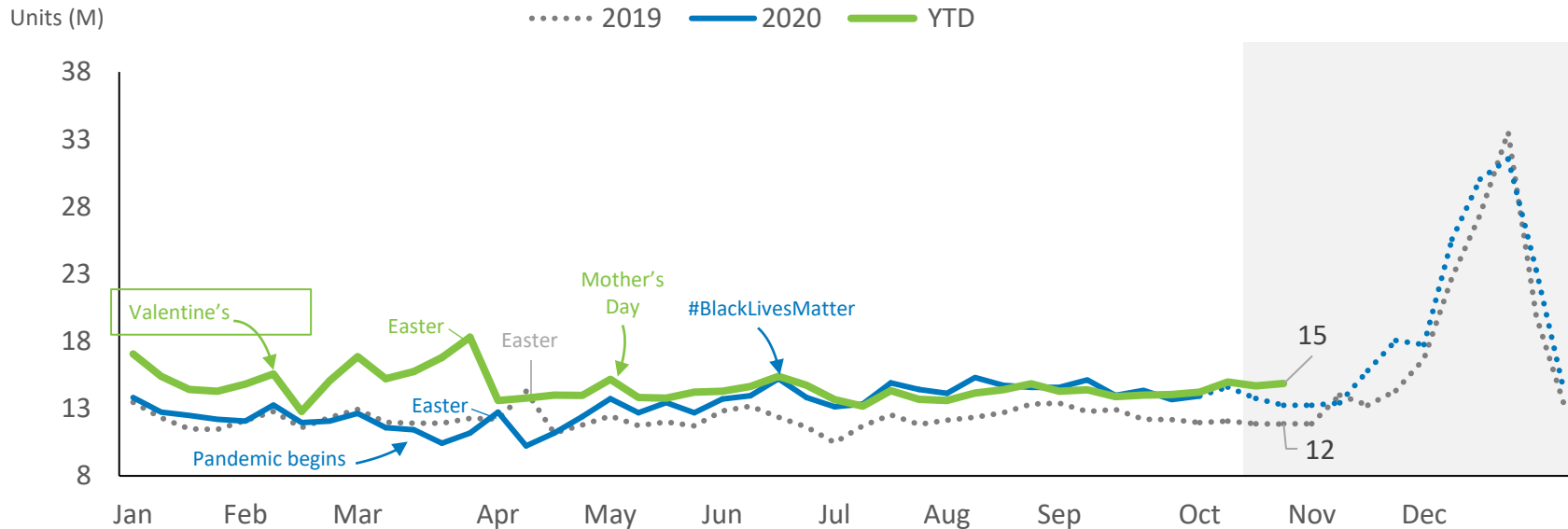
71% of people engaged with books
in the last 6 months

+10% time spent

+16% dollars spent

While settling, volume remains above 2019

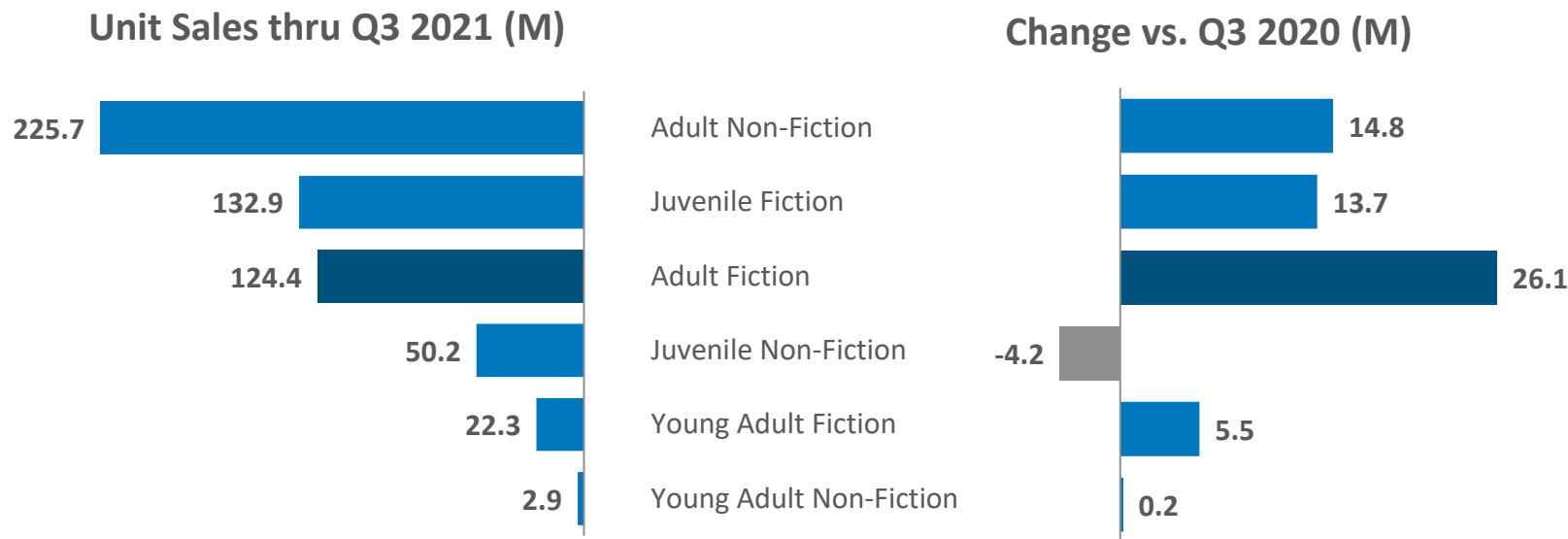
The market is 102M units ahead of 2019 YTD, cuing up a good finish



Source: The NPD Group/NPD BookScan, YTD thru week ending Oct 30, 2021 – U.S. print sales only

Fiction has been the star of the year

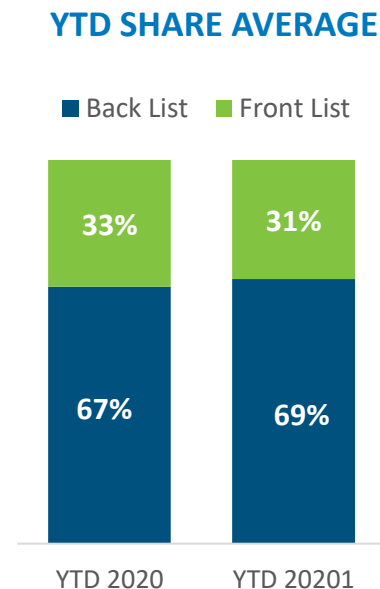
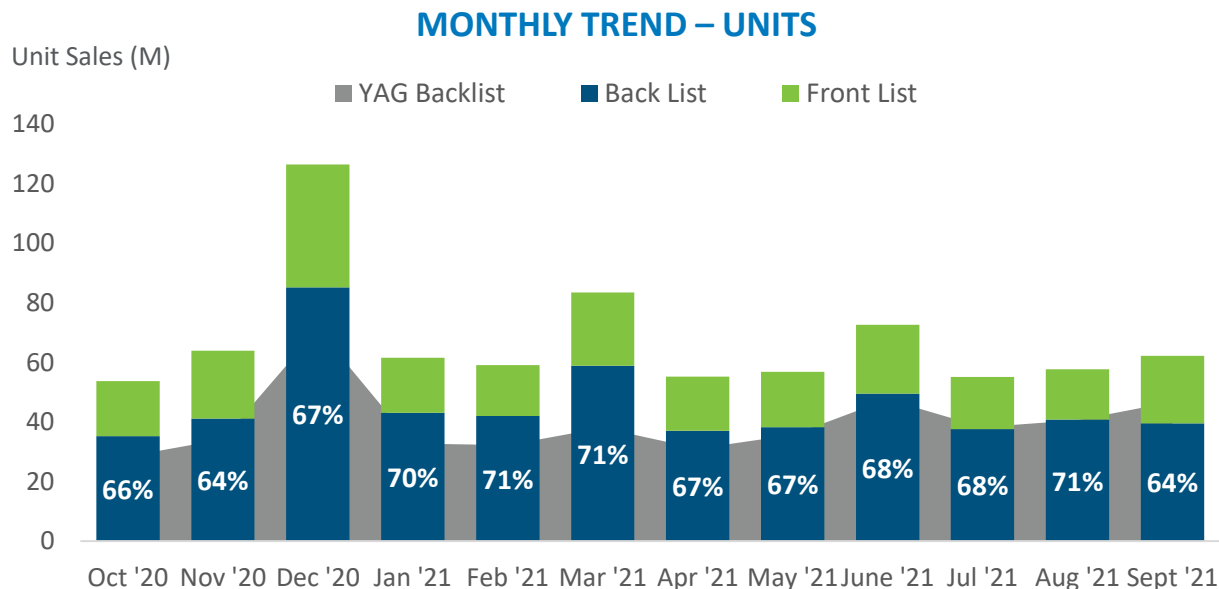
Pushed by the pandemic, Adult fiction contributing 45% of total market gains



Source: The NPD Group/NPD BookScan, YTD thru week ending Oct 2, 2021 – U.S. print sales only

Back List/Front List 12-Month Performance

Frontlist books have lost share to backlist since the pandemic



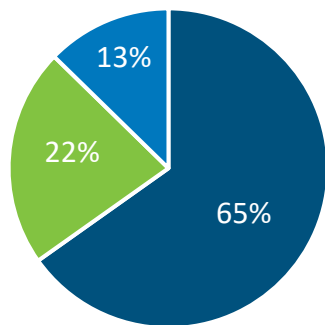
BookScan Backlist definition = books published longer than 12 months ago. Source: The NPD Group/NPD BookScan, YTD thru week ending Oct 2, 2021 – U.S. print sales only

Format Trend – Audio-subgroup - Q2 2021

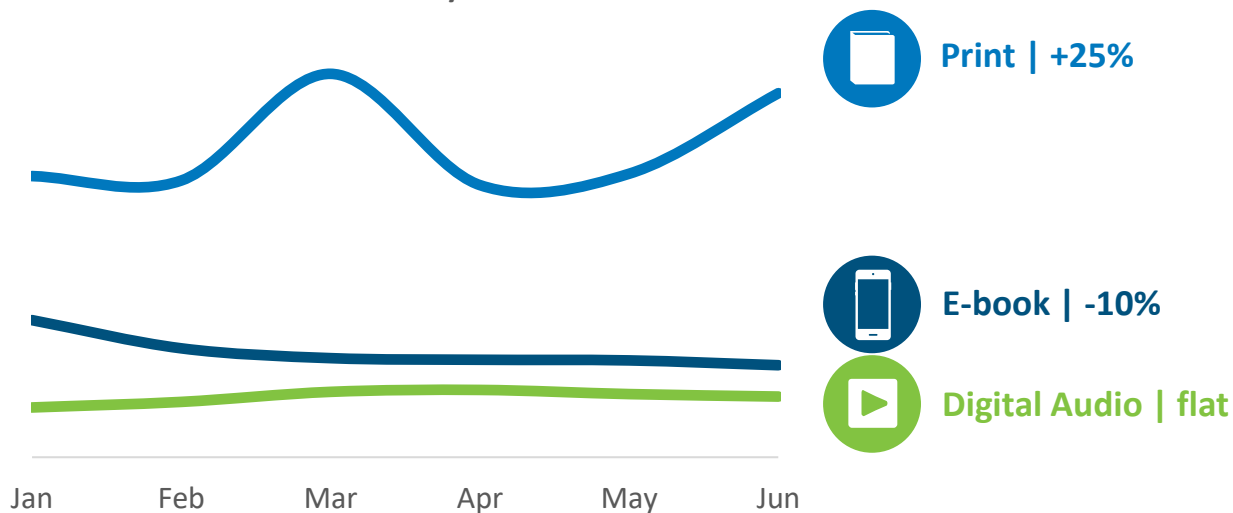
Print and digital audio each gained one share point compared to Q1, while e-book share fell two points

Format Share

■ Print ■ E-book ■ Audio



Monthly Trend



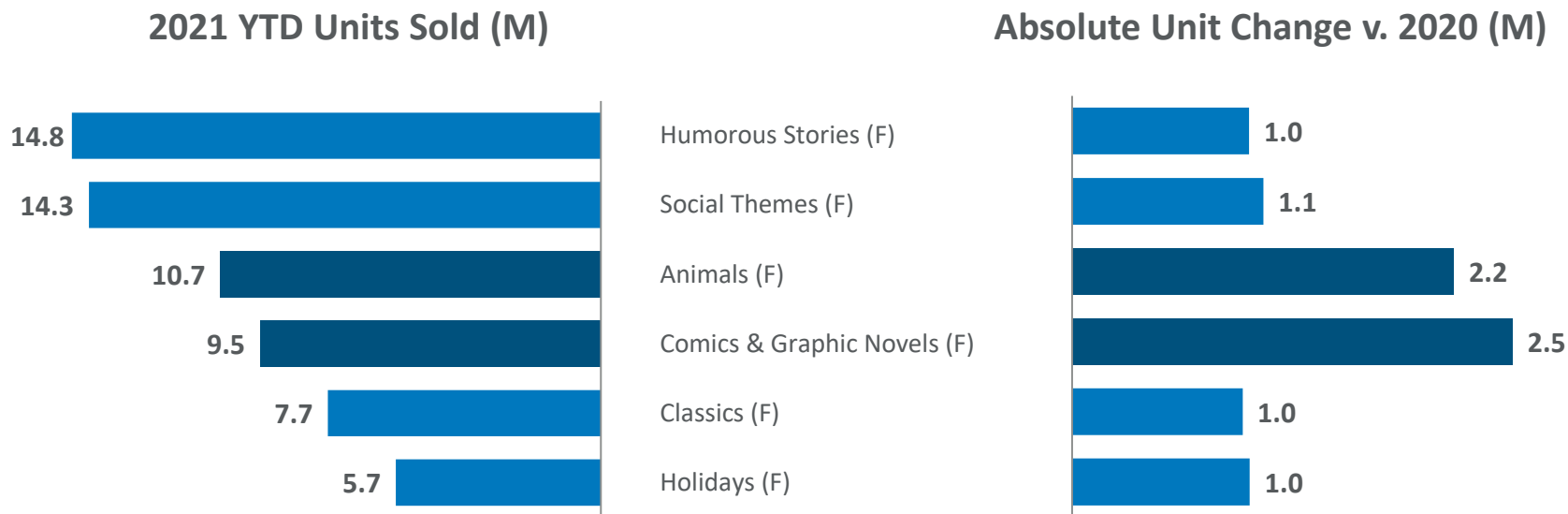
PubTrack Digital Audio includes audiobook information from Hachette Book Group, HarperCollins, Simon & Schuster, Macmillan, Abrams, Chronicle, and IPG.

Available

Source: The NPD Group/NPD BookScan, PubTrack Digital, PubTrack Digital Audio, YTD month ending June 2021, includes participating digital audio publishers only

Winning Kids' Subjects in 2021 so far

Top kids' subjects with the highest growth compared to the same time in 2020

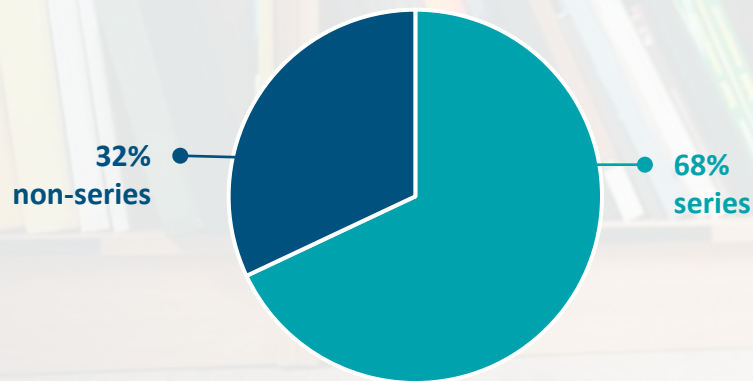


Source: The NPD Group/NPD BookScan, YTD thru week ending Oct 2, 2021 – U.S. print sales only

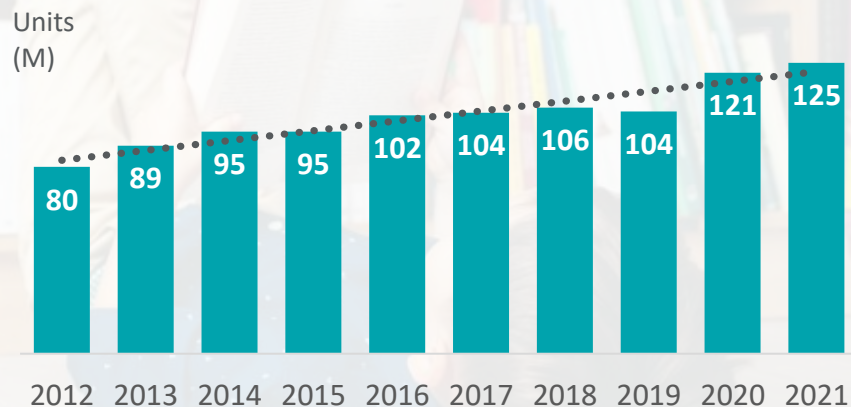
The strength of series in the kids' market

In 2021 series account for 2 of every 3 kids' books sold

YTD 2021 Kids' Print Share



Kids' Series Sales Trend

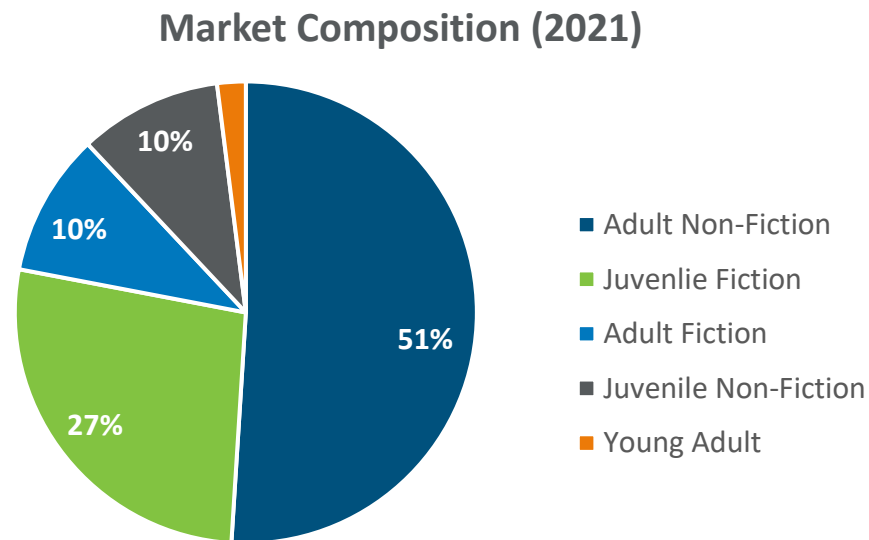
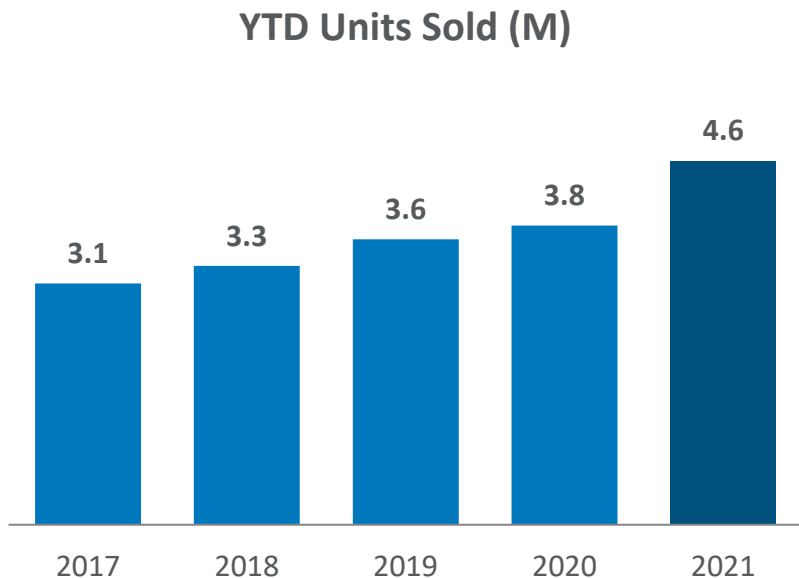


Source: The NPD Group/BookScan, YTD thru week ending Oct 2, 2021, kids' fiction and non-fiction series combined

SPANISH LANGUAGE BOOK TRENDS IN THE U.S.



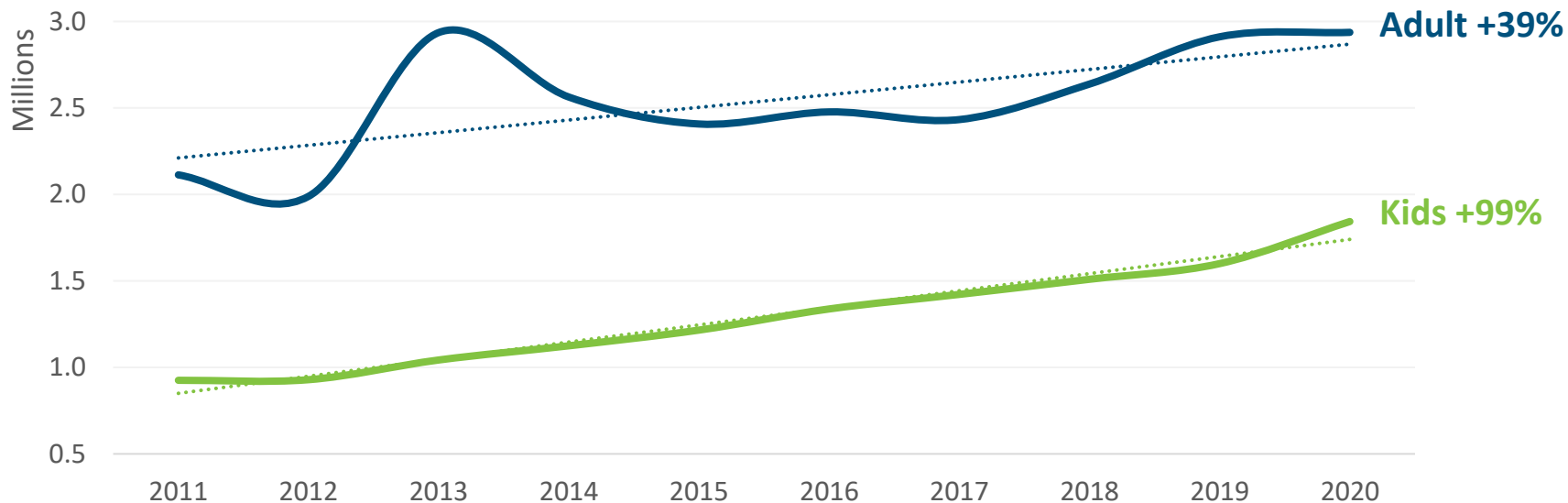
Spanish language books make up 1% of total book sales in the U.S.



Source: The NPD Group/NPD BookScan, YTD through 10/23/21, U.S. print sales only

Long-Term Trend: Spanish Language Unit Sales

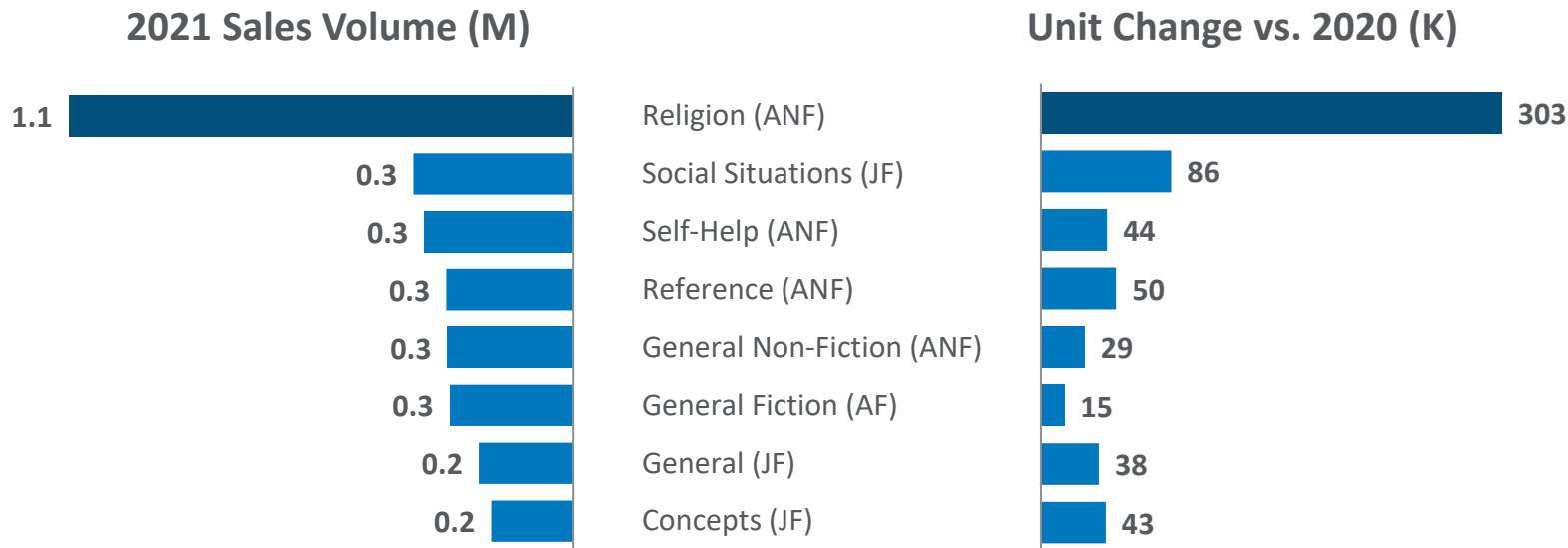
2013 marks a turning point for both adult and kids



Source: The NPD Group/BookScan through week ending 1/2/2021, U.S. print sales only

Spanish Language Top Categories by Volume

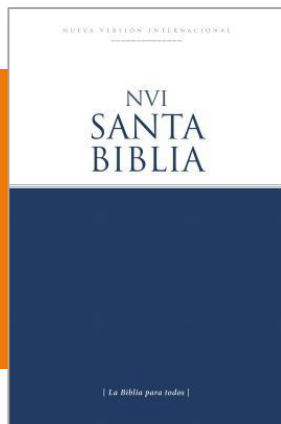
All major categories have posted YOY growth and religion is contributing to 37% of total Spanish language gains



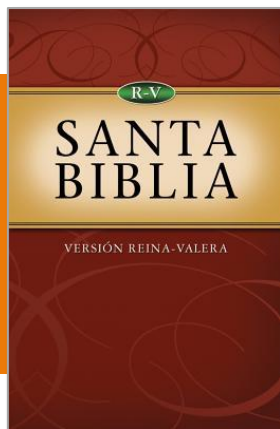
Source: The NPD Group/BookScan, YTD through 10/23/21, U.S. print sales only

Top Growth Spanish Language ANF Religion Titles

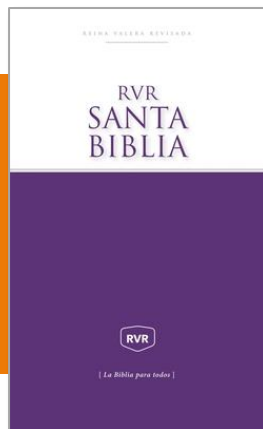
Editions of the Reina Valeria dominate; El Avisio is new to the market in 2021



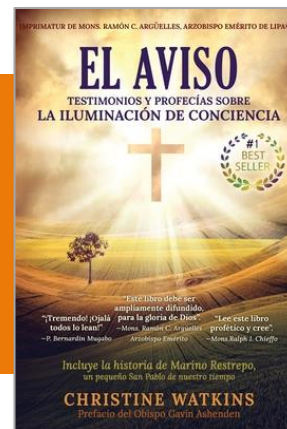
**Biblia NVI, Edición Económica,
Tapa Rústica**
HC Christian
BIBLES / NVI



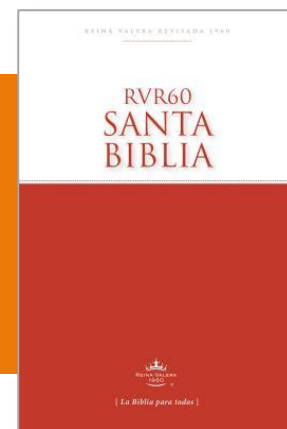
**Santa Biblia
RV-1909**
Barbour
BIBLES / Reina Valera



**Rvr-Santa Biblia - Edición
Económica**
HarperCollins Christian
BIBLES / Reina Valera



**El Aviso: Testimonios Y
Profecías Sobre La
Iluminación De
Consciencia**
Queen of Peace Media
RELIGION / Christian Life



**RVR 60-Santa Biblia -
Edición Económica**
HarperCollins Christian
BIBLES / Reina Valera

Source: The NPD Group/BookScan thru week ending Oct 23, 2021

Spanish Language Bestsellers YTD 2021

Kids' books top the list

Rank	Title	Author	Publisher	ISBN	BISAC 3
1	First 100 Words Bilingual: Primeras 100 Palabras	Priddy, Roger	Macmillan	9780312515836	Juvenile Nonfiction / Concepts / Words (See Also Headings Under Language Arts)
2	Eres Mi Mama?	Eastman, P. D.	Random House	9780375815058	Juvenile Fiction / Family / Parents
3	Biblia NVI, Edición Económica	Nueva Versión Internacional	HC Christian Publishing	9780829767858	Bibles / Nueva Version International / Text
4	La Oruga Muy Hambrienta/The Very Hungry Caterpillar	Carle, Eric	Penguin Group USA	9780399256059	Juvenile Fiction / Animals / Insects, Spiders, Etc.
5	Santa Biblia-RV-1909	Publishing, Barbour	Barbour Publishing Inc	9781586609733	Bibles / Reina Valera / Text
6	Padre Rico, Padre Pobre / Rich Dad Poor Dad	Kiyosaki, Robert T.	PRH Grupo Editorial	9781945540820	Business & Economics / Personal Finance / Money Management
7	Un Pez Dos Peces Pez Rojo Pez Azul/One Fish Two Fish Red Fish Blue Fish	Dr Seuss	Random House	9780525707295	Juvenile Fiction / Concepts / Counting & Numbers
8	Qué Cosas Dice Mi Abuela/The Things My Grandmother Says	Galán, Ana	Scholastic Books	9780545328630	Juvenile Fiction / Family / General (See Also Headings Under Social Themes)
9	The Alchemist \ Alquimista	Coelho, Paulo	Harpercollins Publishers	9780062511409	Fiction / General / General
10	Huevos Verdes Con Jamón/Green Eggs And Ham	Dr Seuss	Random House	9780525707233	Juvenile Fiction / Concepts / Counting & Numbers

Source: The NPD Group | NPD BookScan™, YTD through week ending Oct 23, 2021

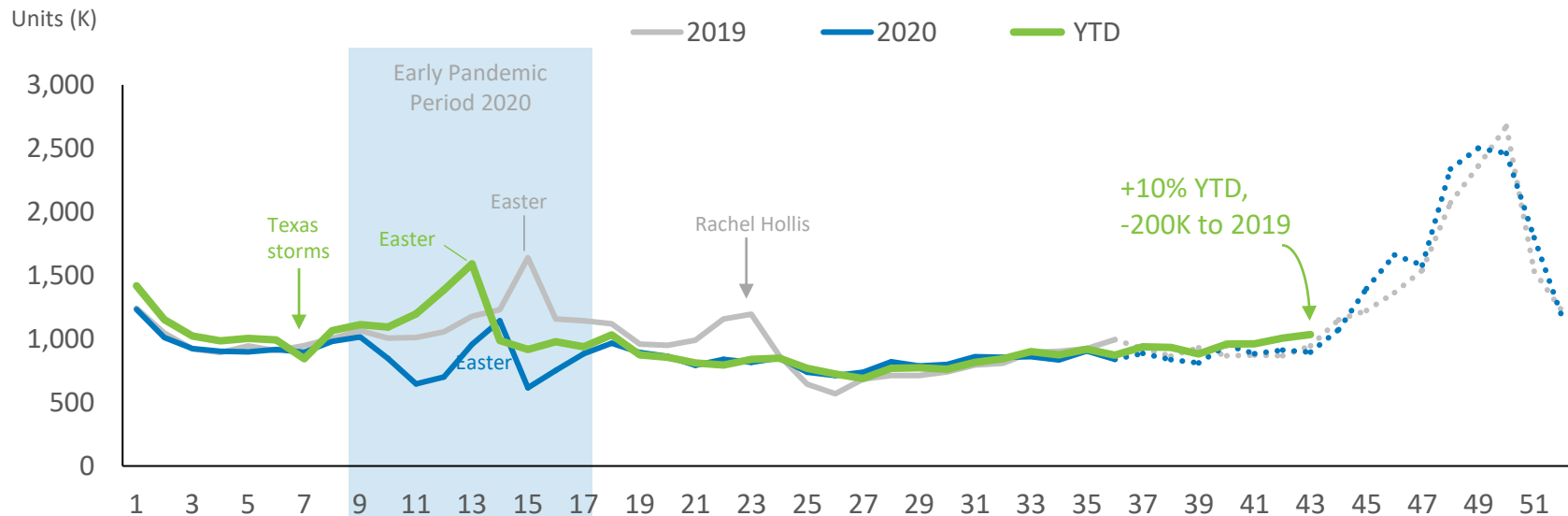
A person is holding an open book, with their hands visible. The image is overlaid with a semi-transparent blue filter. The text "CHRISTIAN BOOK MARKET PERFORMANCE" is centered in white, bold, sans-serif capital letters.

CHRISTIAN BOOK MARKET PERFORMANCE

The Christian market is right on trend



We're not seeing +2019 growth, but market is +3.7M units over 2020 YTD



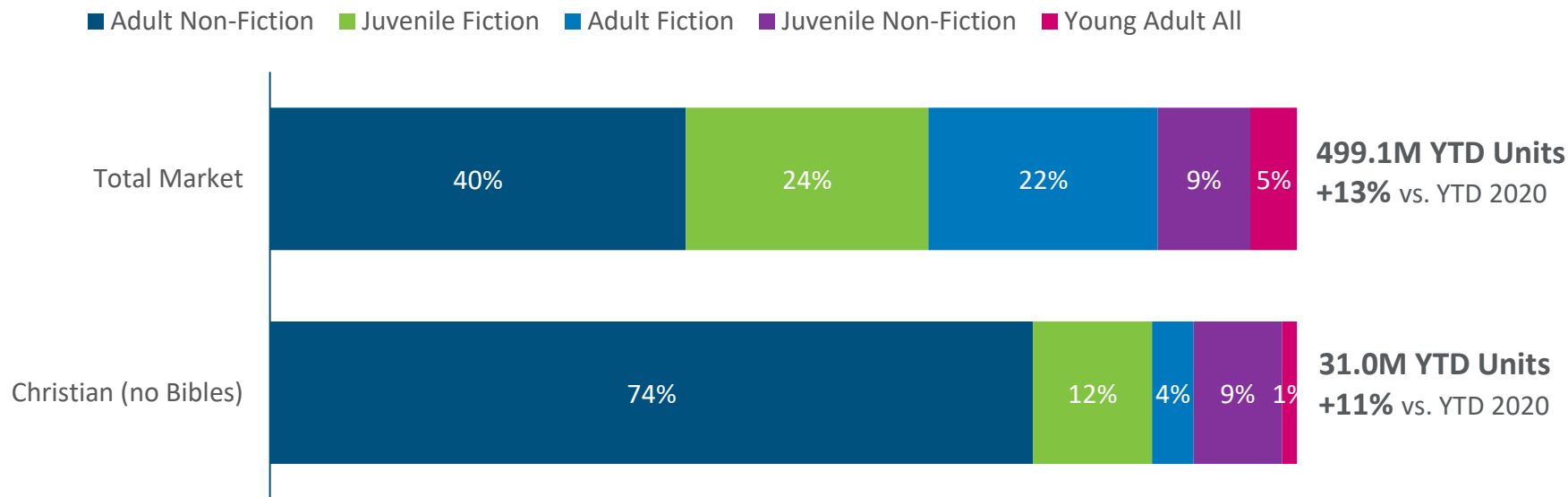
Source: The NPD Group/NPD BookScan, Christian market only,
YTD thru week ending Oct 30, 2021— U.S. print sales only

ANF is a make-or-break category for Christian



If ANF demand is down, the Christian market will underperform

Sales Share by Supercategory – Units



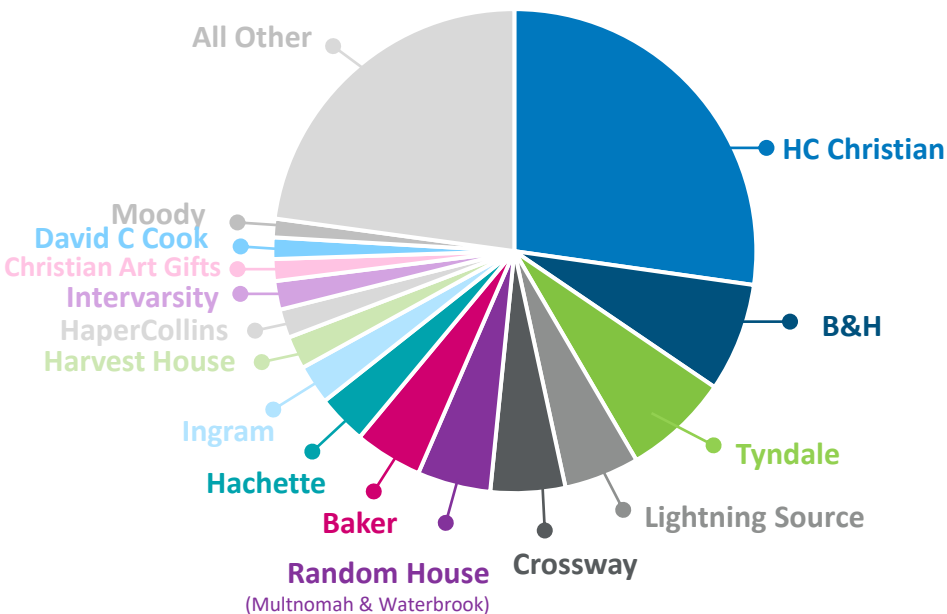
Source: The NPD Group | NPD BookScan, Christian Market includes all sales in all non-Bible Christian BISACs, YTD thru week ending Aug 28, 2021. Print sales only.

Trade Christian market by publisher

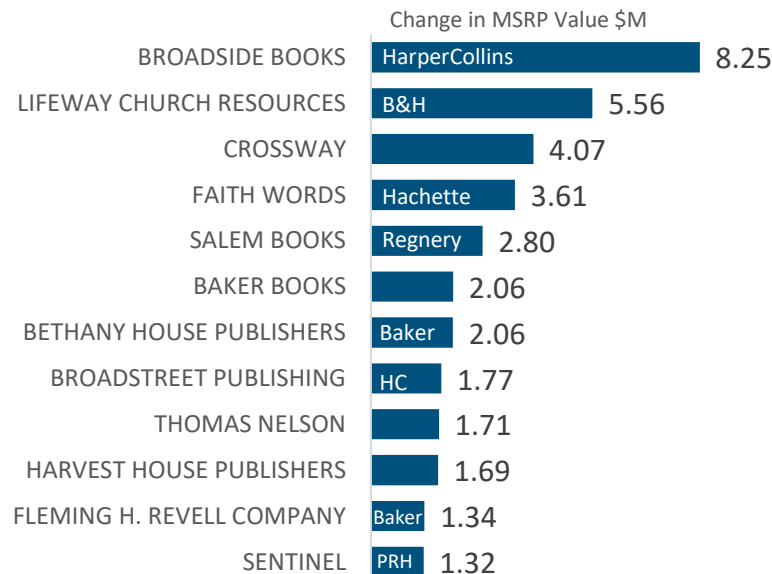


HC Christian is the largest Christian publisher capturing 1/4 of YTD \$MSRP value

Print Share by MSRP Value (2020)



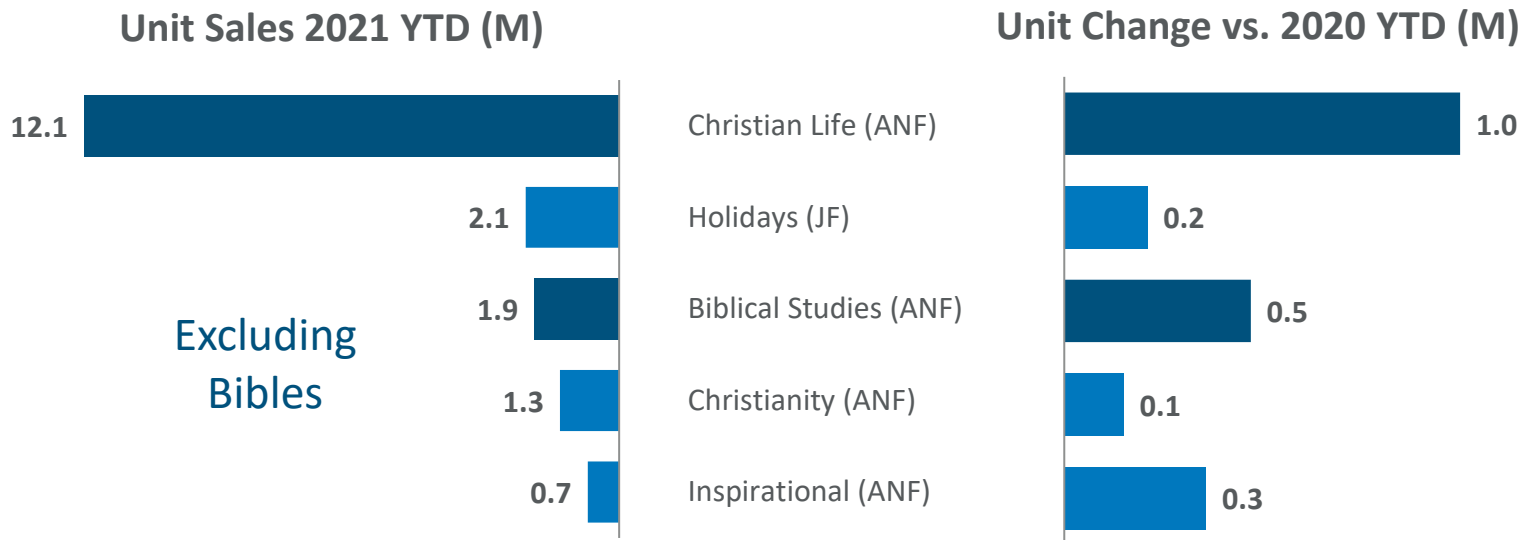
Highest-growth Imprints YTD



Source: The NPD Group/NPD BookScan™, YTD through August 28, 2021, by \$MSRP value, print only. Imprints chart at right excludes Bibles. Imprints owned by publishers indicated in white above.

2021 top growth Christian BISACs

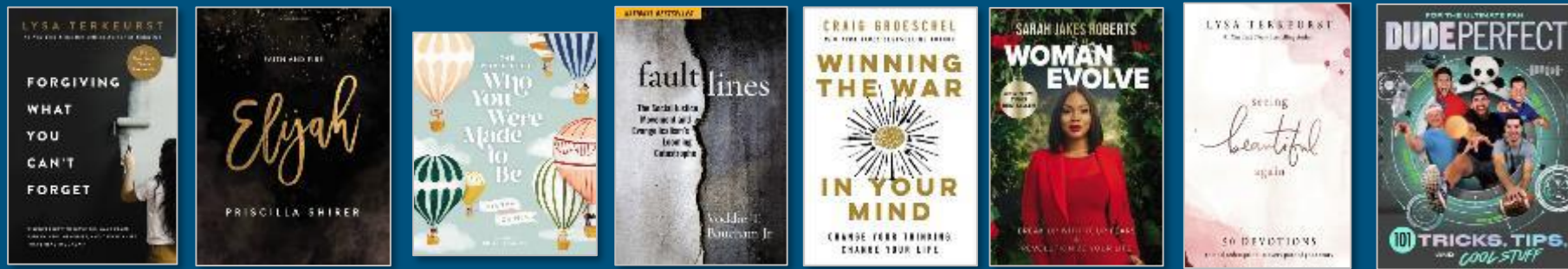
Christian Life and Biblical Studies are leading growth BISACs



Source: The NPD Group/NPD BookScan, YTD thru week ending Aug 28, 2021, excluding Bibles

Top 8 Non-Bible Titles overall – 2021

Many of the lead titles have broad, cross-market appeal



Forgiving What You Can't Forget

Lysa Terkeurst
Thomas Nelson
REL / Christian
Life

Elijah

Priscilla Shirer
Lifeway Church
Resources
REL / Biblical
Studies

The World Needs Who You Were Made to Be

Joanna Gaines
Thomas Nelson
JNF / Insp. &
Personal Growth

Fault Lines

Voddie T.
Baucham
Salem
Books/Regnery
REL / Christian
Life

Winning the War in Your Mind

Craig Groeschel
Zondervan
REL / Christian
Life

Woman Evolve

Sarah Jakes
Roberts
Thomas Nelson
REL / Christian Life

Seeing Beautiful Again

Lysa Terkeurst
Thomas Nelson
REL / Christian
Life

101 Tricks, Tips, And Cool Stuff

Dude Perfect
Thomas Nelson
JNF / Games &
Activities

Source: The NPD Group/BookScan thru week ending Aug 28, 2021

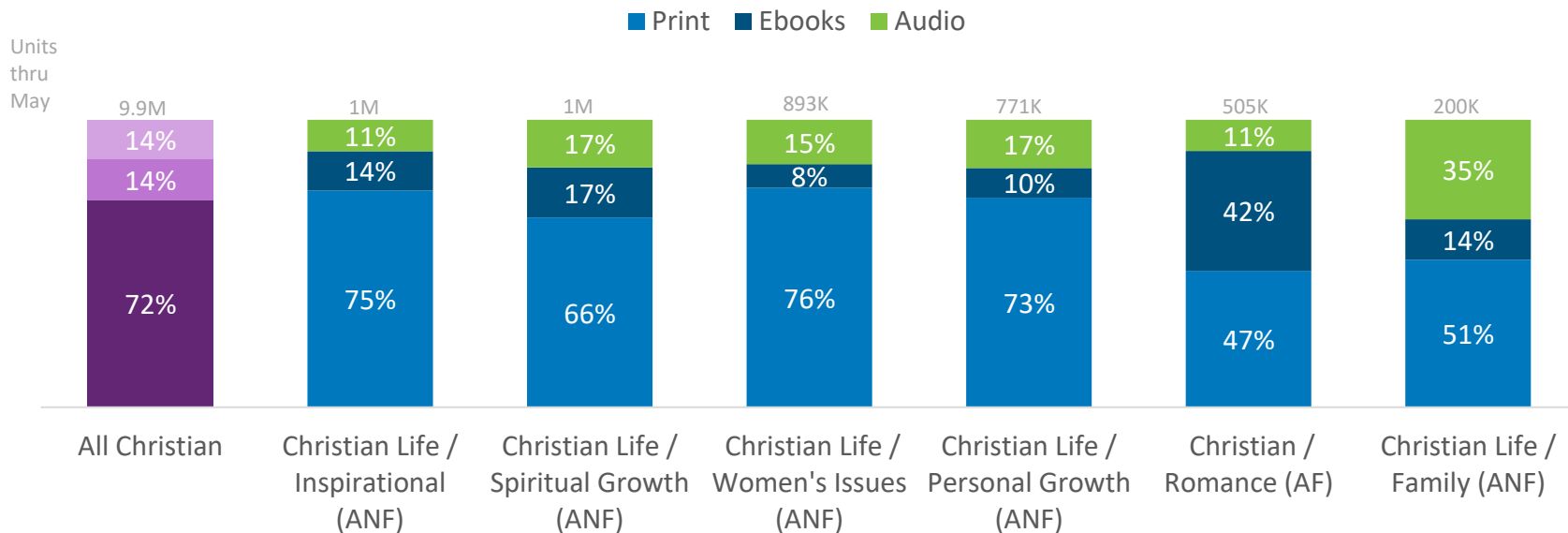
Source: The NPD Group/NPD BookScan™, YTD through August 28, 2021, by unit sales, print only

Format share - top Christian audio categories



There is wide range in share by category; opportunities vary by title

Top 6 Christian Audio Categories



PubTrack Digital Audio includes audiobook information from Hachette Book Group, HarperCollins, Simon & Schuster, Macmillan, Abrams, Chronicle, and IPG.

Source: The NPD Group/NPD BookScan, PubTrack Digital, PubTrack Digital Audio, YTD month ending May 2021, Christian BISAC only from participating digital audio publishers only

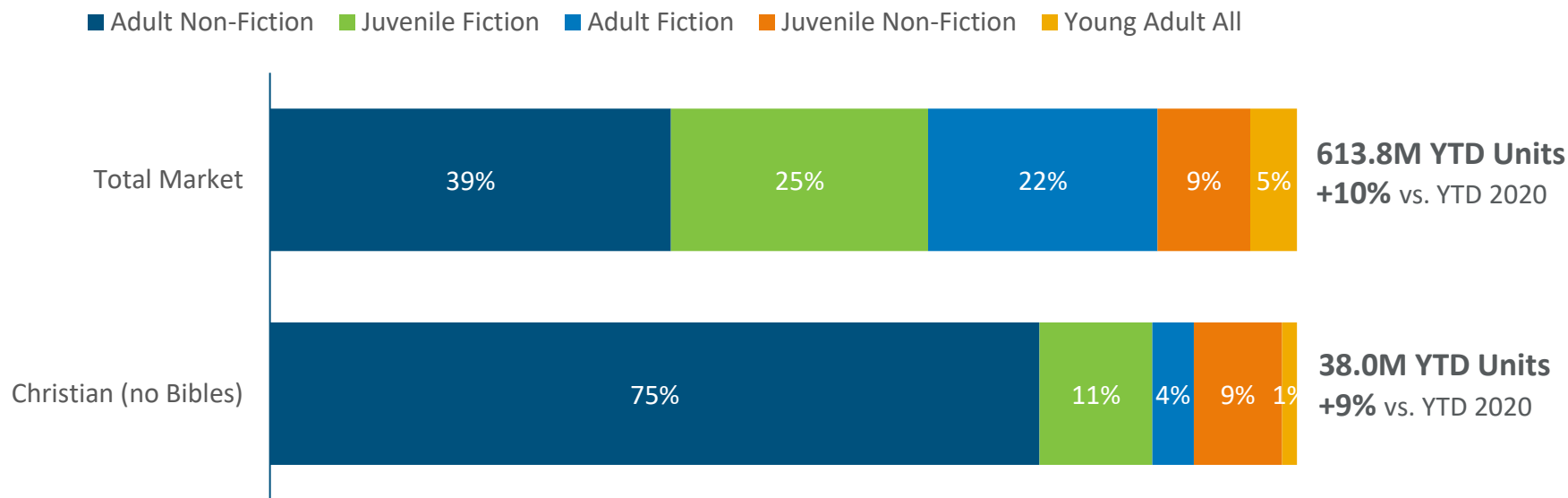


THE KIDS' CHRISTIAN MARKET

Kids' under-index in the Christian Market

Compared to the total market, kids' is a smaller piece of the pie

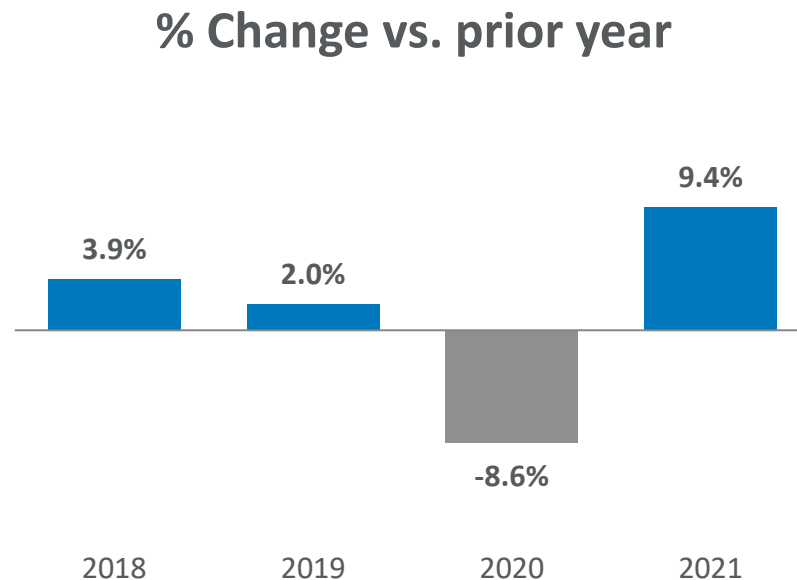
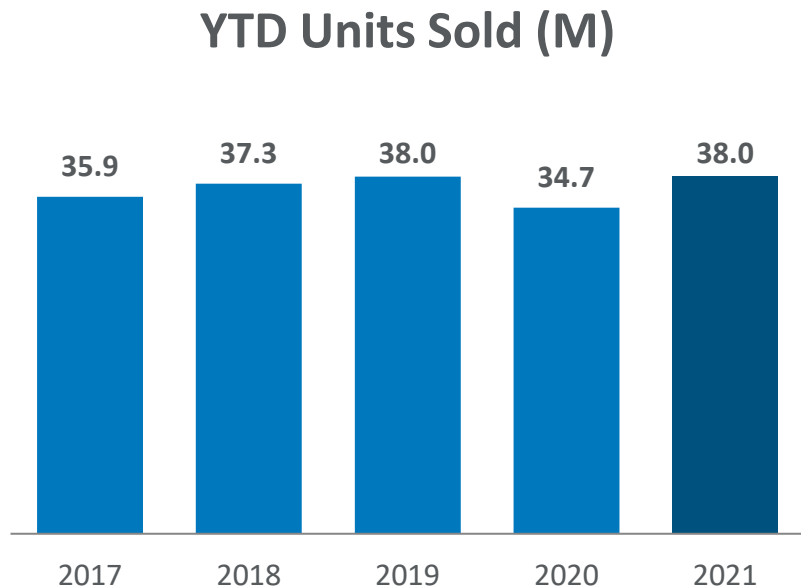
Sales Share by Supercategory – Units



Source: The NPD Group | NPD BookScan, Christian Market includes all sales in all non-Bible Christian BISACs, YTD thru week ending Oct 23, 2021. Print sales only.

Christian Market 5-Year Trend

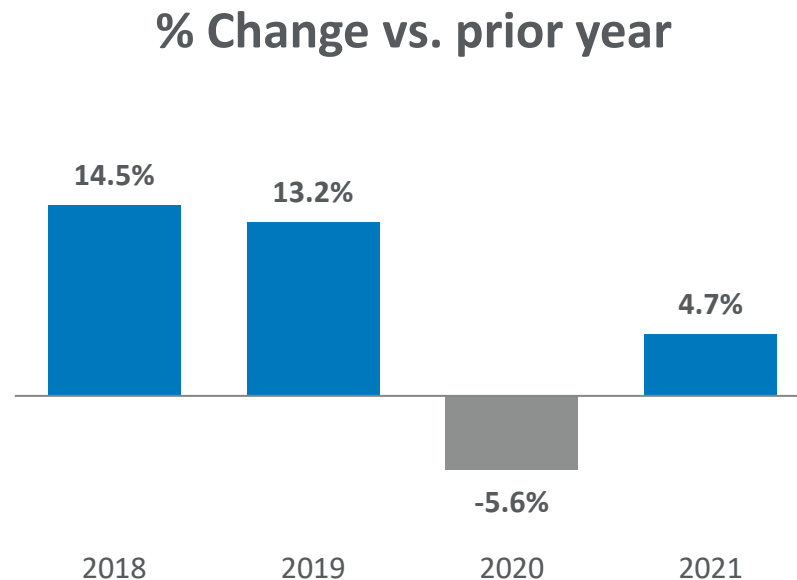
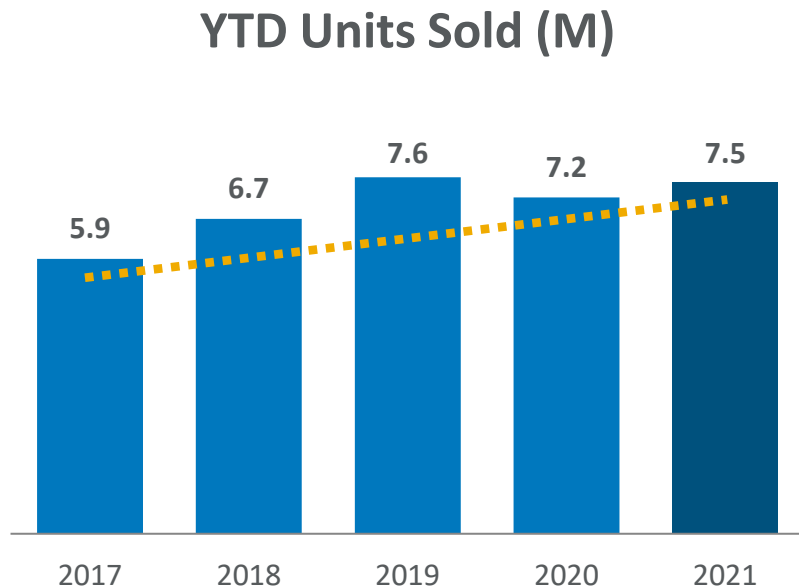
2021 YTD unit sales are up 3M vs. 2020 and flat vs. 2019



Source: The NPD Group | NPD BookScan, Christian Market BISACs, YTD thru week ending Oct 23, 2021. Print sales only.

Kids' Christian 5-Year Trend

2021 YTD unit sales are up more than 300K vs. 2020 but down 100K vs. 2019



Source: The NPD Group | NPD BookScan, Juvenile Fiction and Non-Fiction Christian Market BISACs, YTD thru week ending Oct 23, 2021. Print sales only.

Kids' Non-Fiction Growing 1.5X Faster Than Fiction

YTD Unit % Change



Kids' Christian Non-Fiction

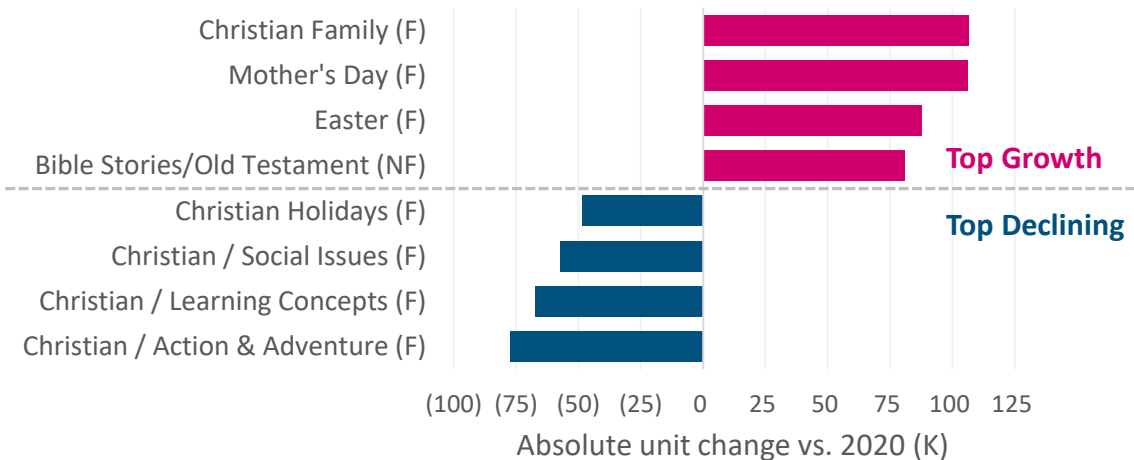
Kids' Christian Fiction

Source: The NPD Group | NPD BookScan, Juvenile Fiction and Non-Fiction Christian Market BISACs, YTD thru week ending Oct 23, 2021. Print sales only.

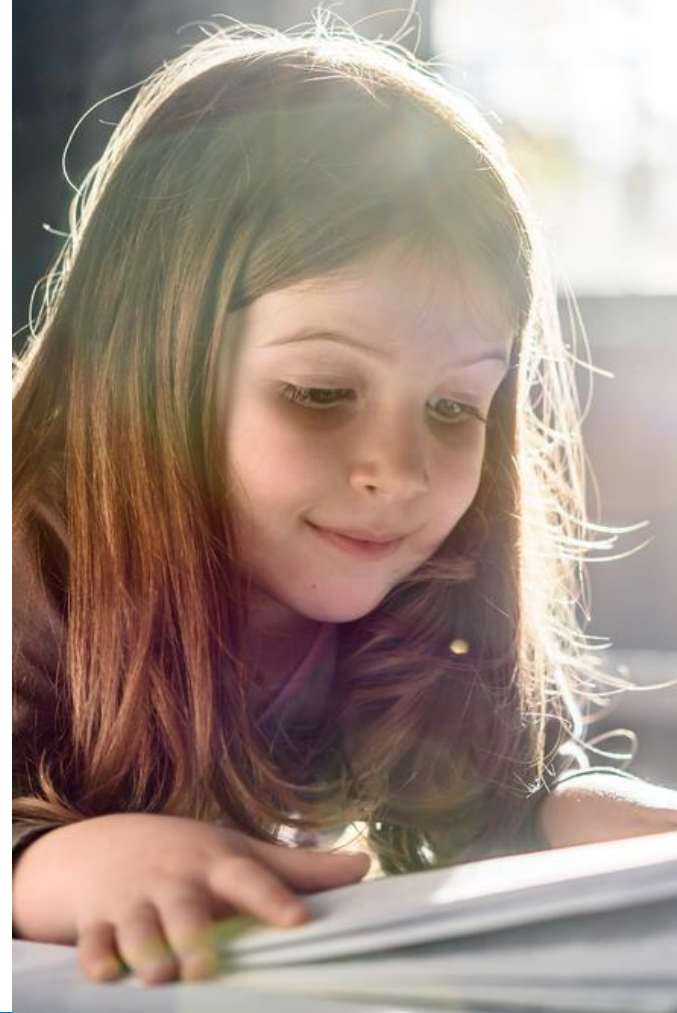
Kids' Christian Volume Shifts

Christian Family (F) and Mother's Day (F) are both up 100K in units

Top Growth/Declining Kids' Christian BISACS

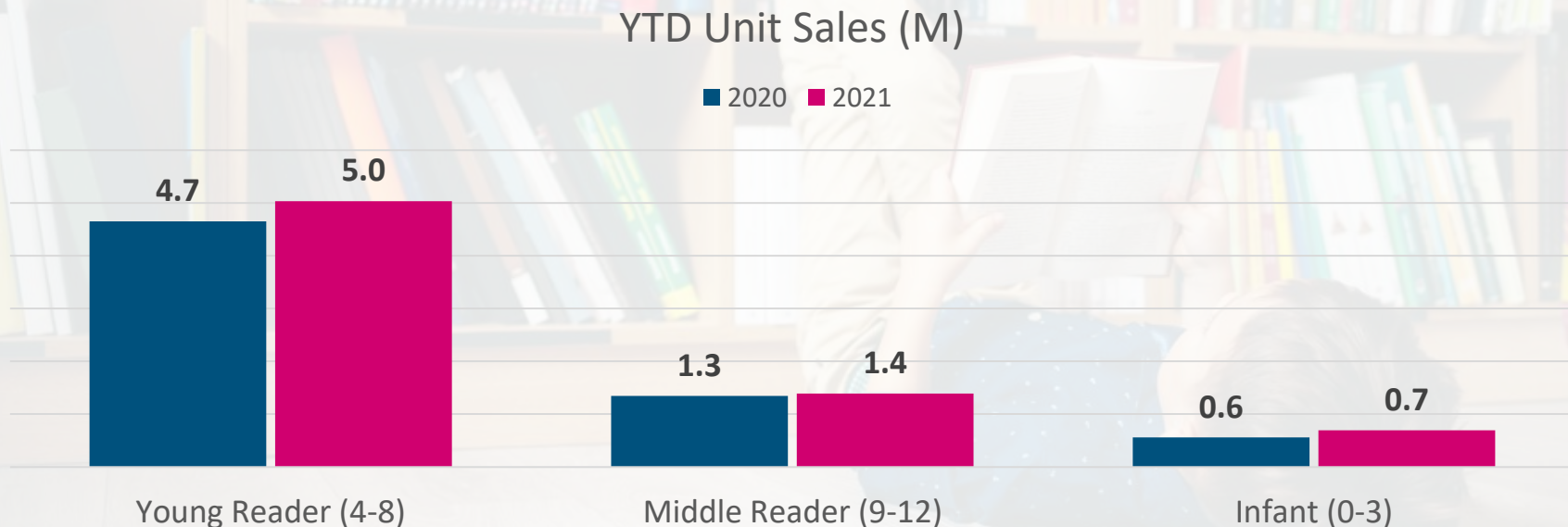


Source: The NPD Group | NPD BookScan, Juvenile Fiction and Non-Fiction Christian Market BISACs, YTD thru week ending Oct 23, 2021. Print sales only.



Kids' Christian market by age range

The young reader age segment (4-8) has the highest absolute gains, up 300K units YOY



Source: The NPD Group/BookScan, YTD thru week ending Oct 23, 2021

Kids' Christian Bestsellers YTD 2021

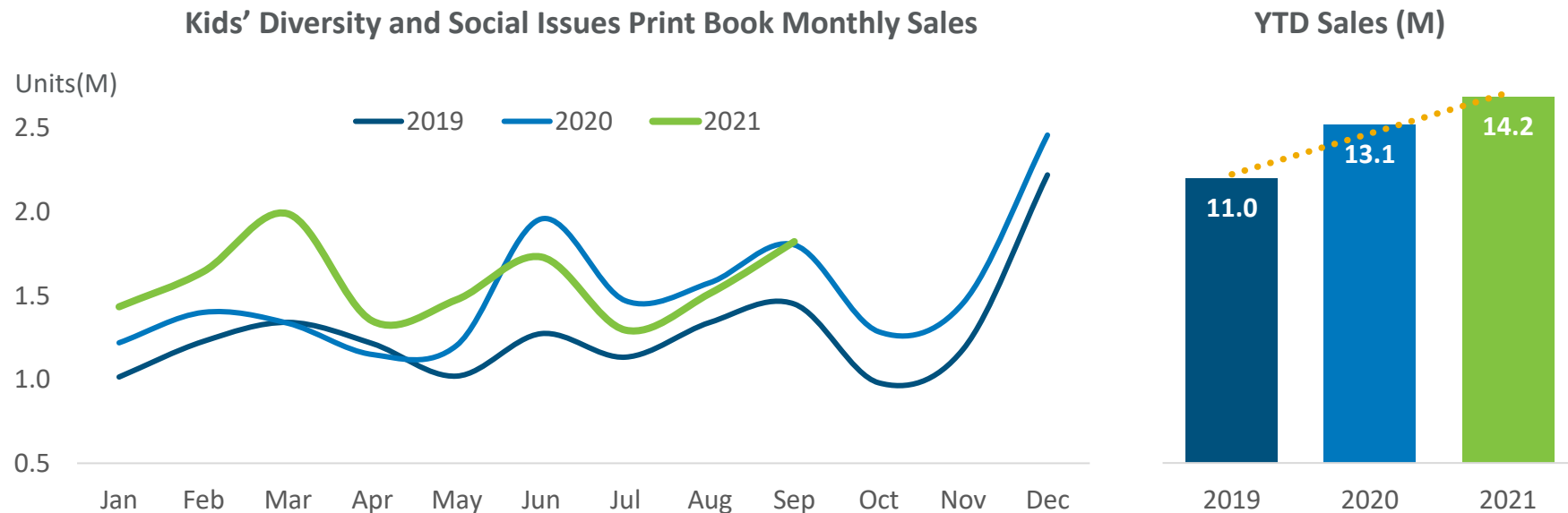
Four of the top ten are non-fiction Bible stories

Rank	Title	Author	Publisher	ISBN	BISAC 4
1	The Beginner's Bible	Zondervan	HC Christian Publishing	9780310750130	Juvenile Nonfiction / Religion / Bible Stories / Old Testament
2	A Mother's Love: The Story Of The Midnight Angel	Marilee Joy Mayfield	Puppy Dogs	9781949474756	Juvenile Fiction / Holidays & Celebrations / Mother'S Day / General
3	Pete The Cat: Big Easter Adventure	James Dean	Harpercollins Publishers	9780062198679	Juvenile Fiction / Holidays & Celebrations / Easter & Lent / General
4	The Jesus Storybook Bible: Every Story Whispers His Name	Sally Lloyd-Jones	HC Christian Publishing	9780310708254	Juvenile Nonfiction / Religion / Bible Stories / New Testament
5	How To Catch The Easter Bunny	Adam Wallace	Sourcebooks Inc	9781492638179	Juvenile Fiction / Holidays & Celebrations / Easter & Lent / General
6	My First Read And Learn Bible	American Bible Society	Scholastic Books	9780439651288	Juvenile Nonfiction / Religion / Biblical Studies / General
7	The Good Egg Presents: The Great Eggscape!	Jory John	Harpercollins Publishers	9780062975676	Juvenile Fiction / Holidays & Celebrations / Easter & Lent / General
8	The Action Bible: God's Redemptive Story	Sergio Cariello	David C Cook	9780830777440	Juvenile Nonfiction / Religion / Bible Stories / General
9	Llama Llama Easter Egg	Anna Dewdney	Penguin Group USA	9780451469823	Juvenile Fiction / Holidays & Celebrations / Easter & Lent / General
10	Bronco And Friends: A Party To Remember	Tim Tebow	Random House	9780593232040	Juvenile Fiction / Religious / Christian / Family

Source: The NPD Group | NPD BookScan™, YTD through week ending Oct 23, 2021

Trends in Kids' Diversity and Social Issues BISACs

While summer volume has slipped below 2020, unit sales are 8% up YTD.



Source: The NPD Group/NPD BookScan™, week ending July 31, 2021, U.S. print sales only; includes combined BISAC subjects Juvenile Fiction and Non-Fiction/Diversity & Multicultural, Juvenile Fiction/Social Issues, Juvenile Fiction/Social Themes, Juvenile Non-Fiction/Social Topics, excluding non-related topics

SEPA 2021 Key Takeaways

U.S. Books

1

Demand for books in the U.S. is expected to stay relatively strong for the rest of 2021 at the topline. Consumer news relating to supply chain issues is not affecting consumers, but it is pushing buying earlier in the holiday season. The market will finish above 2020.

2

U.S. Christian books sales have recovered to pre-pandemic levels but are not growing like the overall market. However, this is a very good result, because not all churches are back to in-person services.

3

Christian children's books remain a strong opportunity. Children's books are doing well overall, and U.S. Christian schools are growing, partly in reaction to the U.S. social and political climate.

4

The outlook for Spanish-language books is also good. Adult sales are up 39% since 2011, and kids' are up 99% in the same period. Interest in diversity subjects remains historically elevated following 2020, including Hispanic subjects and bi-lingual texts.



Future of Engagement

Where do we take our business from here?



EMPOWERED NETWORKS

Looking for new platforms and organizations that help network the community and support healthy social and business development for the present and the future.



EXPANDED FORMATS

Understand evolving consumer reading and listening behavior and investing in the best formats to meet the needs of different generational and situational readers.



EQUITY & INCLUSION

Look for new voices and publishing opportunities that empower the conversations at the intersection of faith, values, justice, diversity, equity, and inclusion.




RAISING NEW READERS

The outlook for children's books remains very strong, and there is an ongoing opportunity to publish Christian-centered content that helps families raise the next generation of Christian readers.

QUESTIONS?

 kristen.mclean@npd.com

 +001.617.620.8607

THANK YOU

Apparel | Appliances | Automotive | B2B Technology | Beauty | Books | Consumer Technology | E-commerce
Fashion Accessories | Food Consumption | Foodservice | Footwear | Home | Juvenile Products | Media Entertainment
Mobile | Office Supplies | Retail | Sports | Toys | Travel Retail | Video Games | Watches

