

# Global bookselling markets 2021

Exploring the current trends shaping the industry

June 2022



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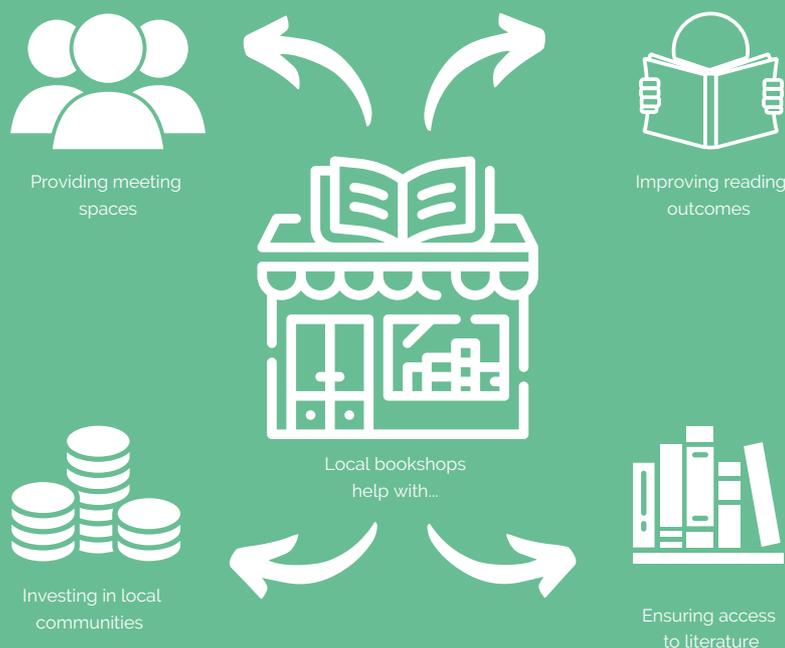
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## About EIBF

The European and International Booksellers Federation (EIBF) is a non-commercial umbrella organization, representing national booksellers associations from all over the world. Through its member associations, EIBF speaks on behalf of more than 25.000 individual booksellers of all kinds, including independent bookshops, chains, and family businesses. We have a long history of representing booksellers and advocating for book-friendly policies to the benefit of readers and retailers.

EIBF works in Europe and around the world to further the interests of the bookselling industry. Our main aim is to ensure that the voices of booksellers are heard in every relevant debate, by advocating for book-friendly policies and legislation that benefit both readers and retailers. Our main activity area also includes communication with and services to our members, and we are continuously increasing the exchange of best practices among our members.

# Introduction

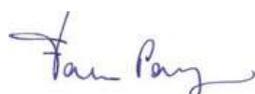
The bookselling industry has been reshaped since the outbreak of the pandemic in early 2020, with many booksellers undergoing a complete reinvention of their business models, often having to incorporate practices not associated with their traditional core business. In these changing circumstances, it is important to acknowledge the importance of customer interaction in bookshops.

Booksellers rely on consumer presence in their stores and this connection is an integral part of any successful bookshop, no matter where in the world the store is located. From bustling city centres and urban residential areas to remote rural spaces, customer engagement underpins bookselling.

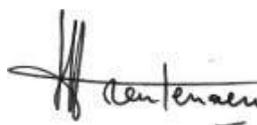
As we try to understand the current trends shaping the global bookselling sector, we have to consider the ones that are gaining traction due to pandemic restrictions, such as lower footfalls in the shops, primarily digital audience groups and overreliance on online sales channels, among others.

To analyse how the global bookselling markets fared in the past year, EIBF carried out a survey among its members and partners in April 2022. The national booksellers associations from eighteen countries responded to our written questionnaire, shedding light on ongoing challenges booksellers face in their daily activities: Australia, Denmark (Faroe Islands), Finland, France, Germany, Ireland, Italy, Latvia, Luxembourg, Netherlands, New Zealand, Norway, Portugal, Romania, Russia, Spain, Sweden, and Switzerland.

This report collates insights into the bookselling industry of 2021, exploring the total sales numbers for the past year and analysing emerging trends to understand how the industry can respond to future development opportunities and challenges. In addition to the survey answers, this report includes supporting information gathered by EIBF during the course of the past year.



**Fabian Paagman**  
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# What can we learn from 2021 figures?

At a first glance, the global bookselling markets appear to be recovering across the board from the pandemic impacts. Looking at overall book sales numbers, across all sales channels, we see that the majority of analysed markets saw increased sales by at least 5% in the past year. In the third of all analysed markets, sales increased by 15% or more.

While many countries experienced national lockdown measures at the start of 2021, most of the restrictions on store closures were lifted by autumn. This allowed booksellers to prepare for the festive period and many customers gladly returned to their local stores. The 2021 end-of-year holiday sales proved to be one of the best in years in several countries.

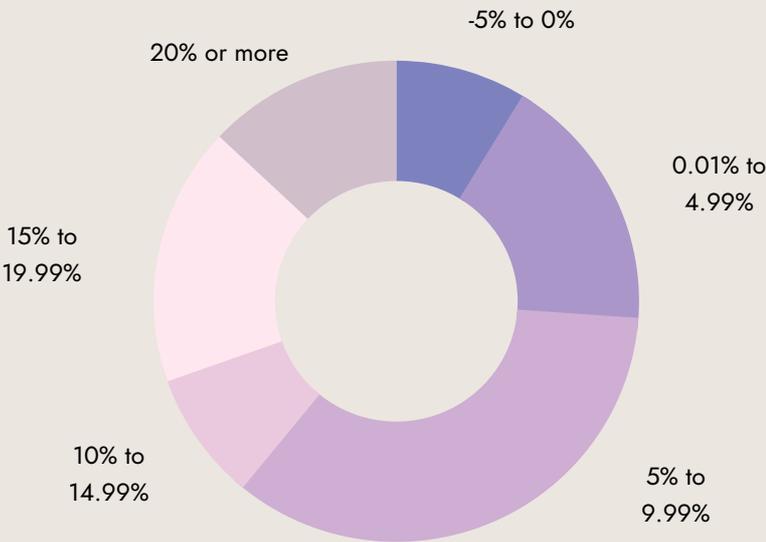
However, it is important to acknowledge that not all growth is equitable, as some sales channels gained more than others. Despite overall market growth, physical sales in bookshops continue to lag behind the digital sales channels in many countries. This was further exacerbated by national lockdown measures in the first half of 2021.

Globally, we saw a significant increase in online sales, with a lot of booksellers developing their own online shops to compete with the internet giants. Many national booksellers associations identified having a physical presence, while also enabling online sales, as a winning combination for bookshops to ensure their growth. Online strategy was identified as crucial for the increase in sales across the book markets worldwide.

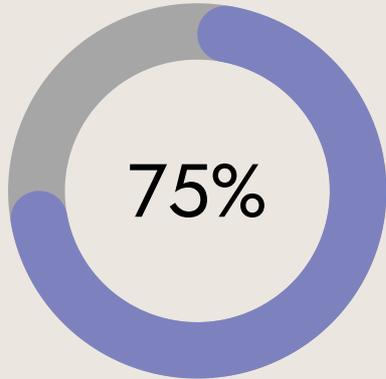
In addition to the expansion of the digital sales channels, streaming services saw the biggest jump in market share in the past year. Even in countries where streaming services had little to no presence before the pandemic, book markets are now seeing an exponential growth of audiobook streaming channels.

Looking at the main development areas for the upcoming weeks and months in 2022, we identified three key areas: upscaling digital presence and optimizing online sales channels, reviewing the supply chain, especially around paper and shipping logistics, and preparing for limited customer purchasing power.

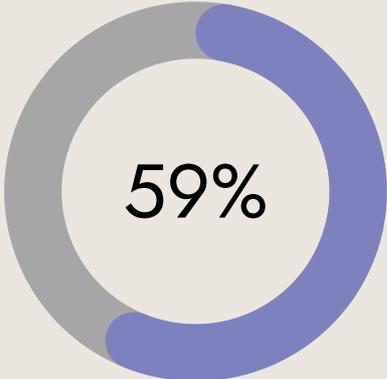
# Global bookselling markets 2021 highlights



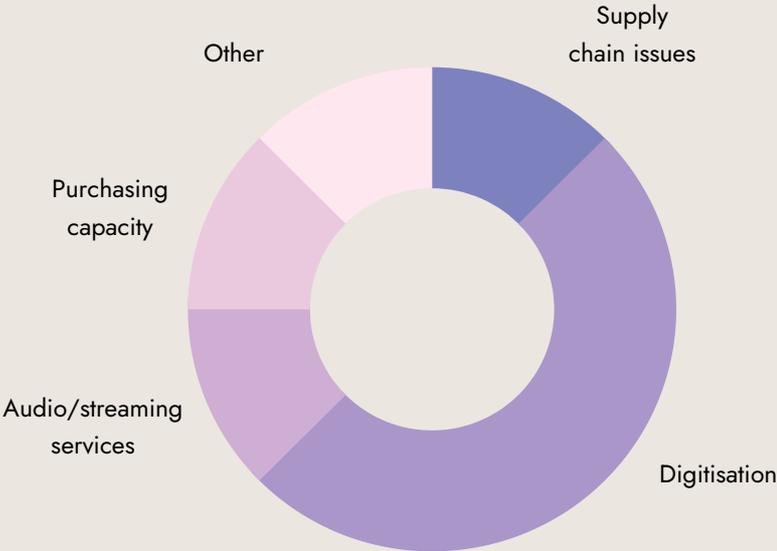
The national book markets grew in the majority of analysed countries



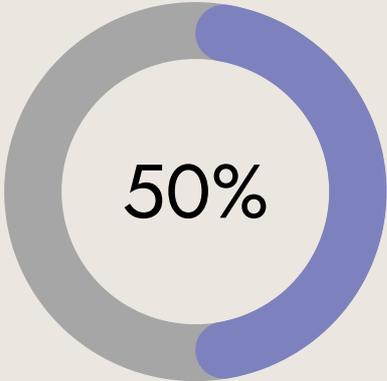
Limited access to cultural venues in lockdown contributed to people choosing books in many countries



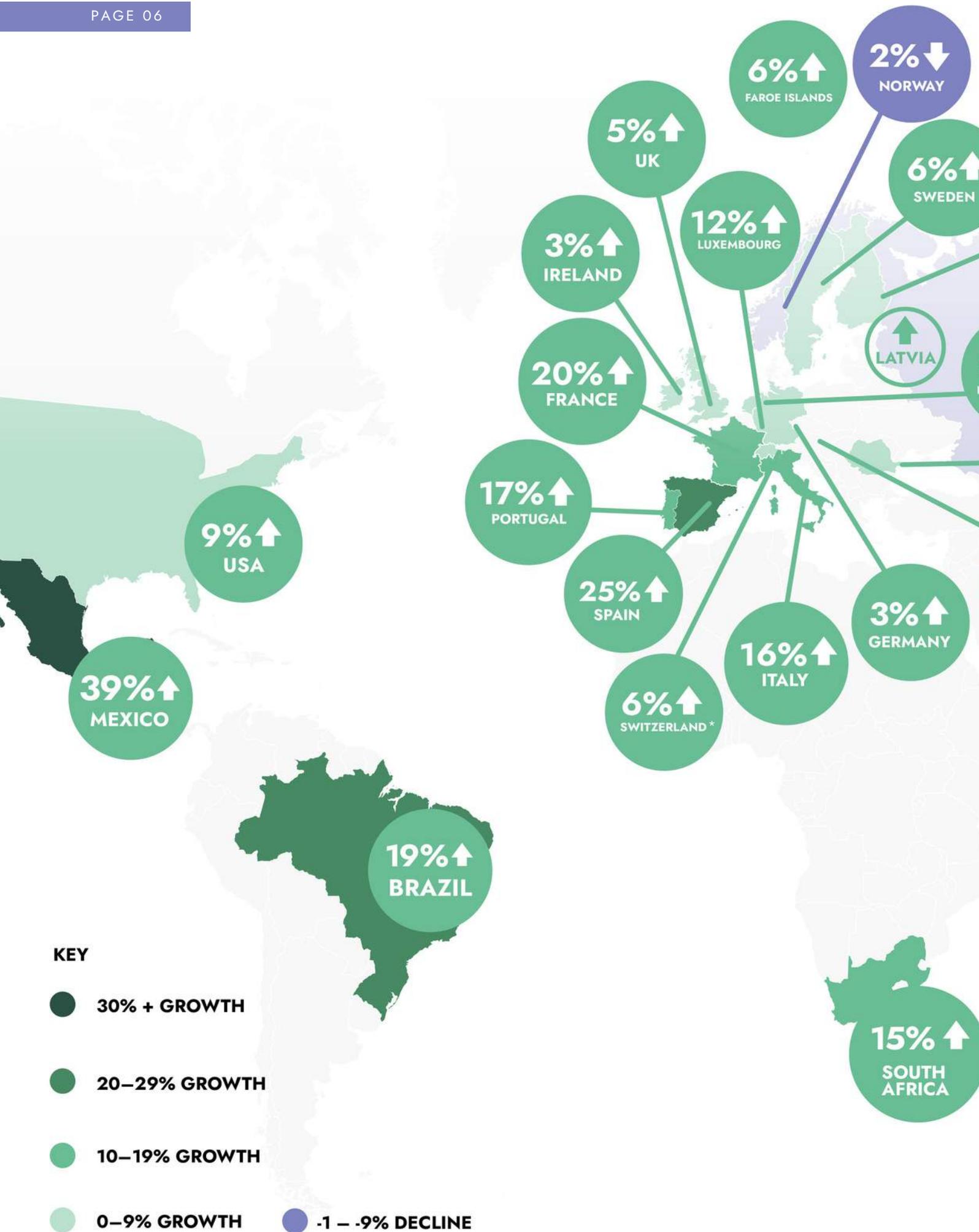
Digital sales have grown in the past year in over half of analysed countries

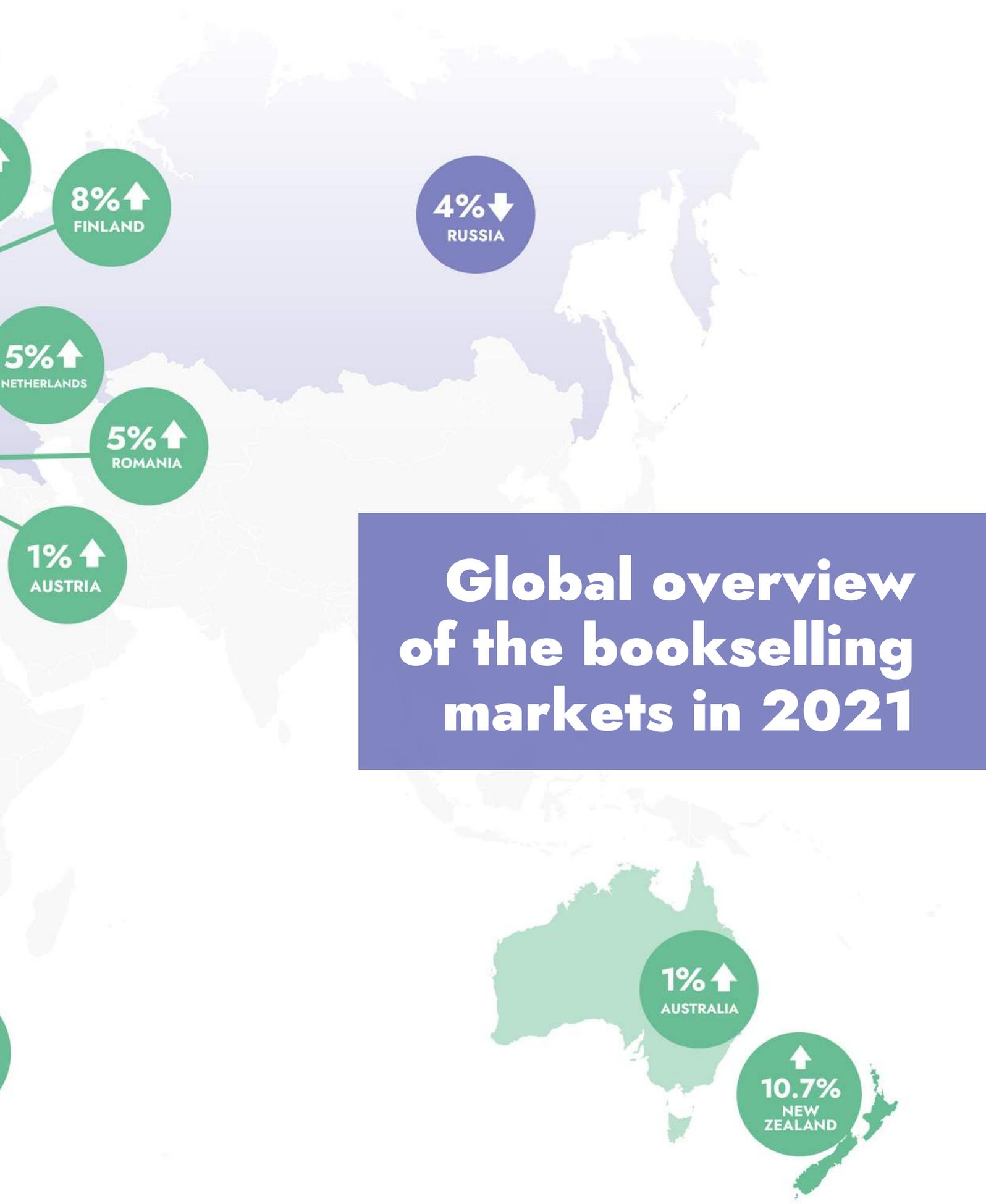


Upscaling digital presence and optimizing online sales channels has been identified as a high priority in many countries



Combined physical presence with online sales proved a winning combination in half of analysed countries





# Global overview of the bookselling markets in 2021

\* The Swiss book sales are based on the numbers provided by the German-speaking Swiss Publishers and Booksellers Association. The numbers for the whole country are likely different.



# Analysing the new trends impacting the global bookselling industry

## Demand for books remained high throughout 2021

Despite national lockdowns and closed shops, the demand for books remained high throughout 2021. Booksellers across the world have seen their business models changing, having to move away from traditional bookselling overnight. However, they rallied and quickly adopted new approaches for pick-up and delivery, which ensured continued customer loyalty to bookshops. While online sales channels gained in popularity, booksellers still have an important advantage in our ever-more digitized world: practical insights on the market, as well as the knowledge and desire to share books recommendations with everyone.

Bookselling Ireland: "Ireland had a very strict lockdown and people were reluctant to go anywhere, so they turned to reading. In 2021, the pandemic was still causing a lot of uncertainty, but for now consumers are still turning to books in record numbers, and that doesn't look to be abating soon."

Australian Booksellers Association: "Sales across the market were up, largely due to significant lockdowns in Melbourne and Sydney, which accounts for half of the Australian economy. More people bought more books to read at home."

Syndicat des Distributeurs de Loisirs Culturels: "Culture in 2021 was mostly books, with cinemas and theatres being closed for most of the year, and with difficulties to travel abroad. Booksellers did an incredible job to make books available despite restrictions, through online sales, click and collect and personal deliveries, which helped boost book sales numbers. In addition, books have been declared as 'essential goods' in France, so most bookshops remained open during 2021."

## Not all growth is equitable

While overall book sales grew in 2021, physical retail in brick-and-mortar bookshops remained impacted by lockdowns and lower customer traffic. Bookshops with developed online strategy and presence were able to quickly respond to the changing customer needs. Bookshops in rural areas coped better than the shops located in city centres or shopping areas, due to lack of crowds. Local shops were able to meet the needs of their customers with home deliveries and increased flexibility.

German Publishers and Booksellers Association: “The months of store closures at the beginning of the year and the decline in footfall in the city centres have been a great challenge to physical bookstores in particular. They finished with a 3.1% drop in revenues compared to 2020 and an 11.5% drop compared to the pre-Covid year of 2019.”

Dutch Booksellers Association: “In the Netherlands, online sales channels grew by 20%, while physical bookshops saw a decline in sales by 7%. For the first time ever, in 2021 more books were sold by e-commerce channels than by physical shops, with e-commerce gaining 6% of market share year-on-year in 2021.”

Norwegian Booksellers Association: “Digital channels gained the most and physical lost the most. But solutions like click and collect included both digital and physical channels, and were very important during the pandemic.”

Latvian Booksellers Association: “Winners were bookshops with improved online stores, with wide book assortment online and quicker and wider delivery options for customers, and physical shops which, after restriction measures were eased, were ready to meet their customers and deliver higher quality service than before.”

Spanish Booksellers Association: “According to data from the Spanish Federation of Publishers Guilds (FGEE), book sales in Spain grew. However, the sales in bookstores saw a loss. It is obvious that customers continued buying books at a normal rate, they just made their purchases online.”

## Exploring the pandemic impacts on bookselling trends

Pandemic restrictions posed a different challenge for booksellers, and wider retail sector. Large share of population around the world continued to work remotely throughout 2021, which resulted in lower consumer traffic in stores. Adapting to shifting regulations took its toll and businesses in city centers and larger shopping areas were particularly affected. This impacted the sales of different book genres: children's sections and comic books have seen the biggest gains, while non-fiction, especially business and economics, saw a decline. Travel genre saw the steepest loss of sales since the start of the pandemic.

Swedish Booksellers Association: "We never had a complete lockdown in Sweden, but people were asked to avoid stores and shopping centers, which had a negative impact on book sales during the pandemic. When restrictions were lifted, customers returned."

Bookselling Ireland: "More money was spent on books in Ireland in 2021 than ever before, with total sales reaching €165.9m, €4.4m ahead of 2020 (+3%). The children's section saw its highest volume and value on record, with fiction earning its highest value since 2010 and non-fiction having its fifth-highest year by value."

Syndicat des Distributeurs de Loisirs Culturels: "It is unclear if it is linked to pandemic, but comics, including manga sales hit the sky in France – with 108% increase."

German Publishers and Booksellers Association: "Books for children and young adults continued to record large increases during the pandemic: titles for this young target group brought in 9% more sales last year than in 2019. Fiction (+4%) and non-fiction (+2%) also gained ground compared to pre-pandemic levels. A large sales gap still exists for travel literature (-26%)."

Portuguese Publishers and Booksellers Association: "Compared with pre-pandemic year 2019, comics and manga section saw the largest increase in sales in Portugal (+68%). Fiction titles are also up by +7%, while tourism books are lagging behind by staggering -80%."

## Looking ahead: future development opportunities

As we emerge from the pandemic, booksellers will continue to benefit from the more agile business models and newly acquired skills and knowledge from the last two years, including the scaled up digital presence, variety of delivery options offered and hosting of hybrid events. However, it is important to continue building on this, reaching more customers and engaging them through various channels.

Latvian Booksellers Association: “We are waiting for the upcoming autumn and winter months, with some uncertainty because of the increasing prices in all areas that will affect purchasing capacity. Books will have to compete with other essential goods and services.”

German-speaking Swiss Publishers and Booksellers Association: “The main areas of development in the upcoming months will focus on digitalization, and all topics surrounding supply-chain issues, including the shortage of raw materials, first of all the paper supply.”

Portuguese Publishers and Booksellers Association: “Audiobooks are starting to be a small trend in Portugal. Maybe that is the most significant publishing alteration in our market.”

Booksellers Association of New Zealand: “Our main priorities going forward include supporting digital competitiveness for indies against international retailers and local chains, sourcing an alternative audiobook platform that is not owned by a global superpower and that supports the independent sector, as well as improving digital infrastructure for the association to secure revenue streams to support members.”

Luxembourgish Booksellers Federation: “To maintain and stimulate internet sales through an attractive website, which allows 24-hour shopping while optimizing transport costs; ensure optimum service in our sales outlets, enhance the welcome and care of the customer so that they feel at ease; and develop our non-book product offer to accompany our book offer.”

Spanish Booksellers Association: “Spain has observed a shift in customer behavior, prioritizing digital sales channels. This in turn impacts booksellers to prepare themselves better by using tools that allow them to adapt to new and more efficient management, marketing and distribution. With the aid of regional, state and European governments, offering support for modernization and improvement of competitiveness, we foresee the development of digital tools throughout this and next year. We believe it is the only way to allow us to prevail in this market despite the constant disruptions.”

## Ensuring long-term sustainability of the bookselling industry

In the upcoming months, many booksellers will keep working at raising their digital presence and focus on optimizing their online sales channels, even with the return to more established business models. There is also a need to build a pipeline of events, which used to be a staple in our industry and an area that has been deeply disrupted by the pandemic. This runs in parallel with the need to revive high streets and attract more customers back to city centers. Many people are still working from home regularly, so re-engaging this customer segment is of high priority for the industry.

Throughout the pandemic months, we saw many businesses establishing local partnerships, for example florists and chocolatiers working together with booksellers to provide a more comprehensive service. Finding ways to upscale these innovative opportunities will help the sector flourish, while also boosting other local businesses.

However, to ensure the long-term sustainability of the industry, sector professionals have to be aware of one looming challenge: climate change. From acting as an educational space for customers to adopting practical approaches to lower their carbon footprint, booksellers have a role to play in advancing the climate agenda.



We would like to thank our members for their input into this report.

All images are courtesy of [canva.com](https://www.canva.com).

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