

# GLOBAL BOOKSELLING MARKETS 2022



 **eibf**  
The voice of booksellers

**JUNE 2023**

# Table of contents

- 3** Introduction
- 4** What can we learn from 2022 figures?
- 5** Global bookselling markets 2022 highlights
- 6** Global overview of the bookselling markets in 2022
- 8** Analysing the new trends impacting the global bookselling industry
- 8** Extraordinary vs normal growth: 2021 vs 2022
- 10** The effect of inflation on consumer spending
- 12** Adjusting to post-COVID customer trends
- 13** Looking ahead: What's next for the bookselling sector
- 15** About EIBF

# Introduction

Although the extraordinary circumstances posed by the global pandemic were left behind by mid- 2022, the impact of this disruptive scenario left an indelible mark on the bookselling sector.

On the one hand, consumers fully embraced certain practices that had been originally induced by lockdown measures, such as the shift towards remote work or the convenience of shopping using click and collect systems. While the former negatively impacts footfall in urban areas, the latter requires booksellers to maintain a strong online presence and speedy logistics.

On the other hand, it is safe to say that bookshops have proven their resilience more than once over the last few years by quickly adapting to these new demands and consumption habits.

Yet, with COVID-19 subsiding, 2022 brought about its own lot of challenges: war in Ukraine, soaring inflation and energy crisis; all threatening once again the sustainability of the business. As in the previous two years, EIBF has collaborated with its members and partners across the world to create a report that sums up in the most extensive way possible the performance and trends that underpin the bookselling markets in 2022.

For this report to be possible, national booksellers associations and EIBF associate members from sixteen countries have responded to a questionnaire, providing an insight into the state of play of their respective markets and the potential directions that the sector could be heading in: Czech Republic, Finland, France, Germany, Ireland, Italy, Latvia, Netherlands, New Zealand, Norway, Portugal, Spain, Sweden, Switzerland, United Kingdom and United States.

In addition to the data provided by EIBF members and partners, the report includes supporting information on other markets, gathered throughout the year by EIBF. By doing so, the final report aims at expanding the geographical scope initially covered and serving as a reference tool to navigate the current developments in the sector in its most global dimension, as well as the challenges and opportunities lying ahead. Ultimately, we want to position this report as the primary go-to source for global data on bookselling and to give back to booksellers an overview of content that belongs to them.

# What can we learn from 2022 figures?

2022 has been a year of transformation and transition for the bookselling industry, following two unprecedented years of disruption. When looking at the overall book sales numbers from all the analysed markets, we can observe two distinct trends across the globe. Half of the analysed markets experienced a clear decrease in book sales last year, while the other half reported stability and, in some cases, a positive development in turnover.

Broadly speaking, this decline can be explained by two main factors. On the one hand, the exceptional circumstances in 2021: after months of closure, bookshops reopened, boosting sales to a 10-year high, especially at Christmas. Thus, if 2022 sales data still display some positive and encouraging results, they appear very modest when compared to the preceding year.

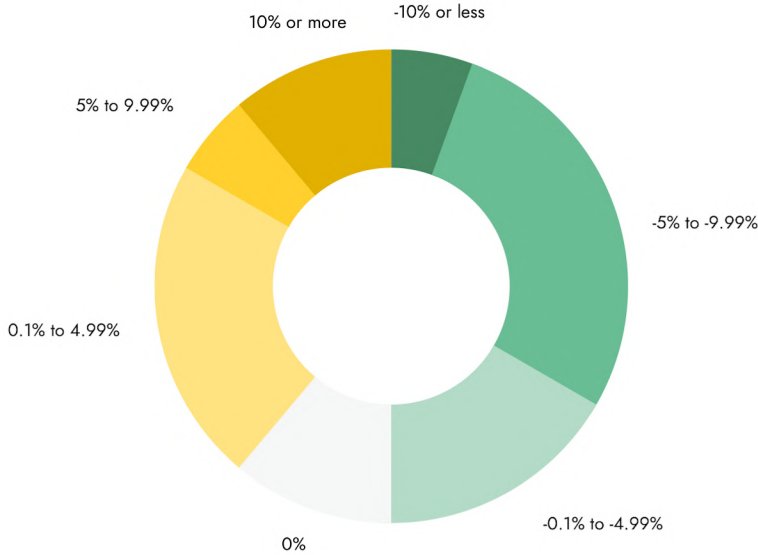
On the other hand, the inflation rising throughout 2022 and the energy crisis, partly caused by the outbreak of Russia's invasion of Ukraine, has limited readers' purchasing power, as well as pushed up production costs within the sector.

That said, when taking a closer look at each of the analysed markets we can see that their performance throughout 2022 has been very diverse. In some cases, the complete return to physical spaces has boosted brick-and-mortar sales. As for digital sales, several of the analysed countries report more modest numbers than in 2021.

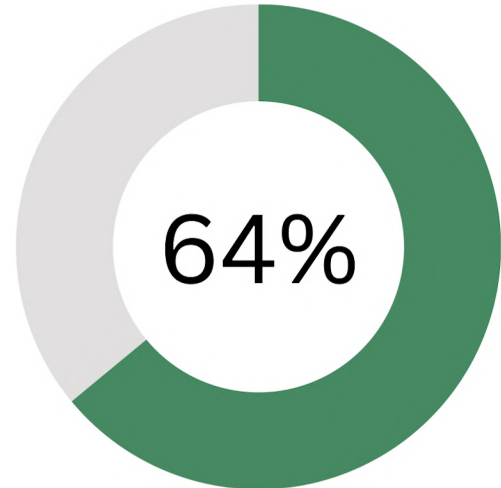
Given the consecutive challenges that bookshops have been facing for the past three years, we can say that booksellers have proved to be highly adaptable and that the numbers displayed in this report are quite positive. Not only do sales data confirm this positive trend, the number of new bookshop openings in 2022 confirm that brick and mortar bookshops are here to stay. In the USA, 247 bookshops opened in 2022 across the country and France gained 142 new bookshops over that same year.

Looking at the future, the sector plans to focus on increasing its sustainability, on training its workforce and on the implementation of new technological tools to increase the capacity and efficiency of the sector.

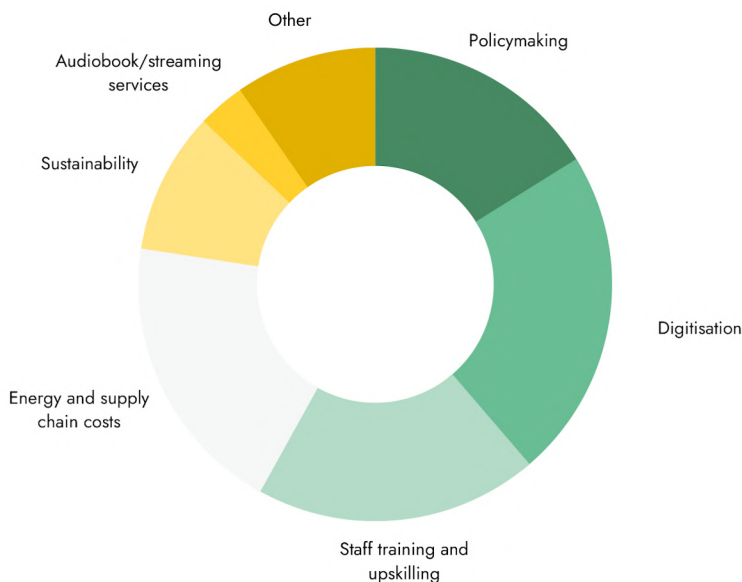
# Global bookselling markets 2022 highlights



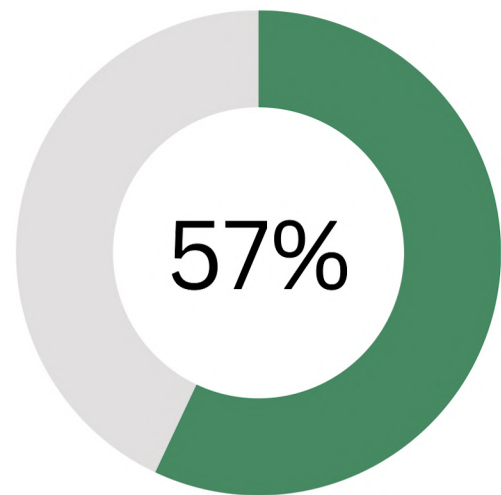
Half of the national book markets reported stability or growth in sales in 2022; the other half experienced a decrease when compared to the exceptional results of 2021



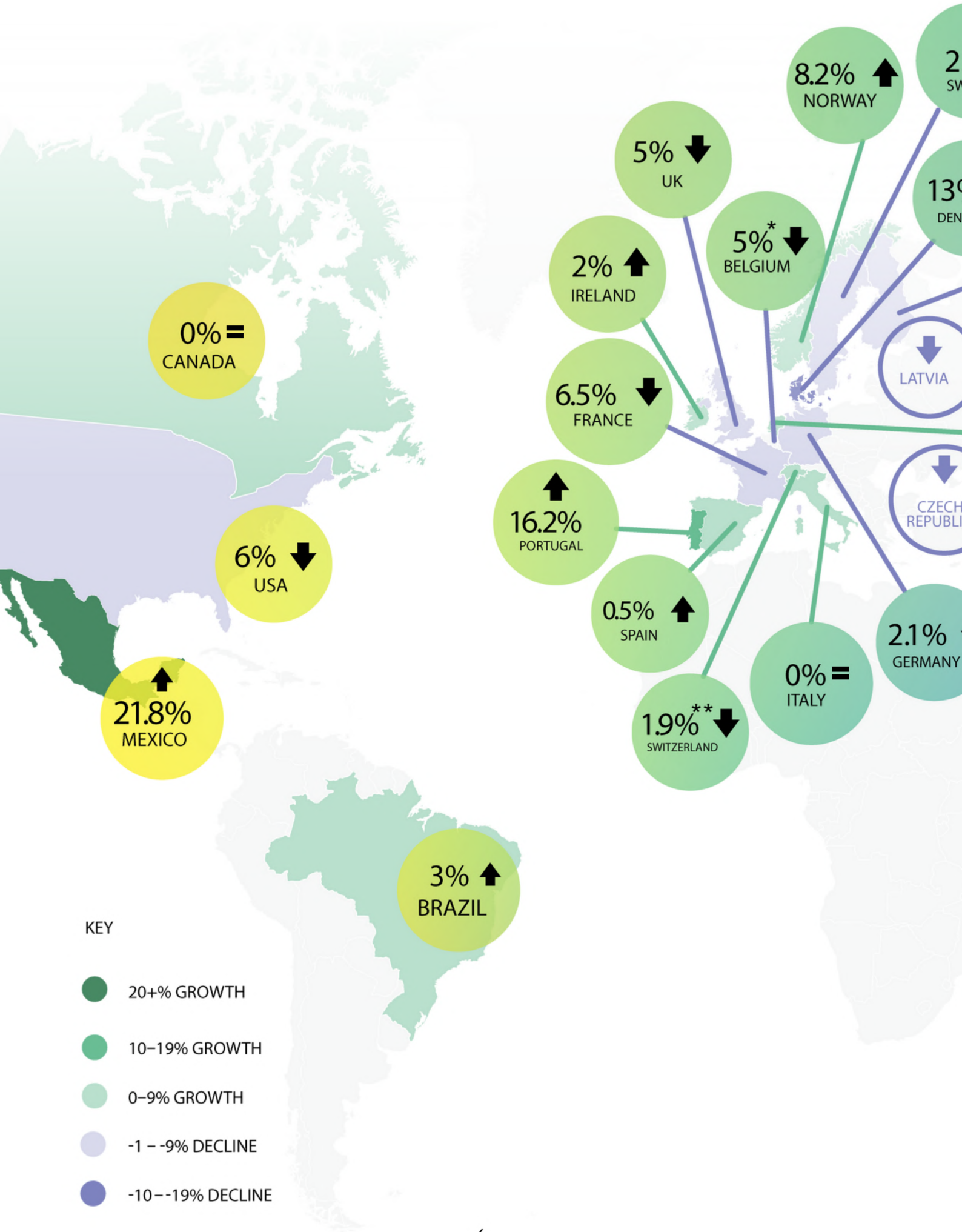
64% of surveyed members reported that brick-and-mortar bookshops is the sales channel that grew the most in 2022



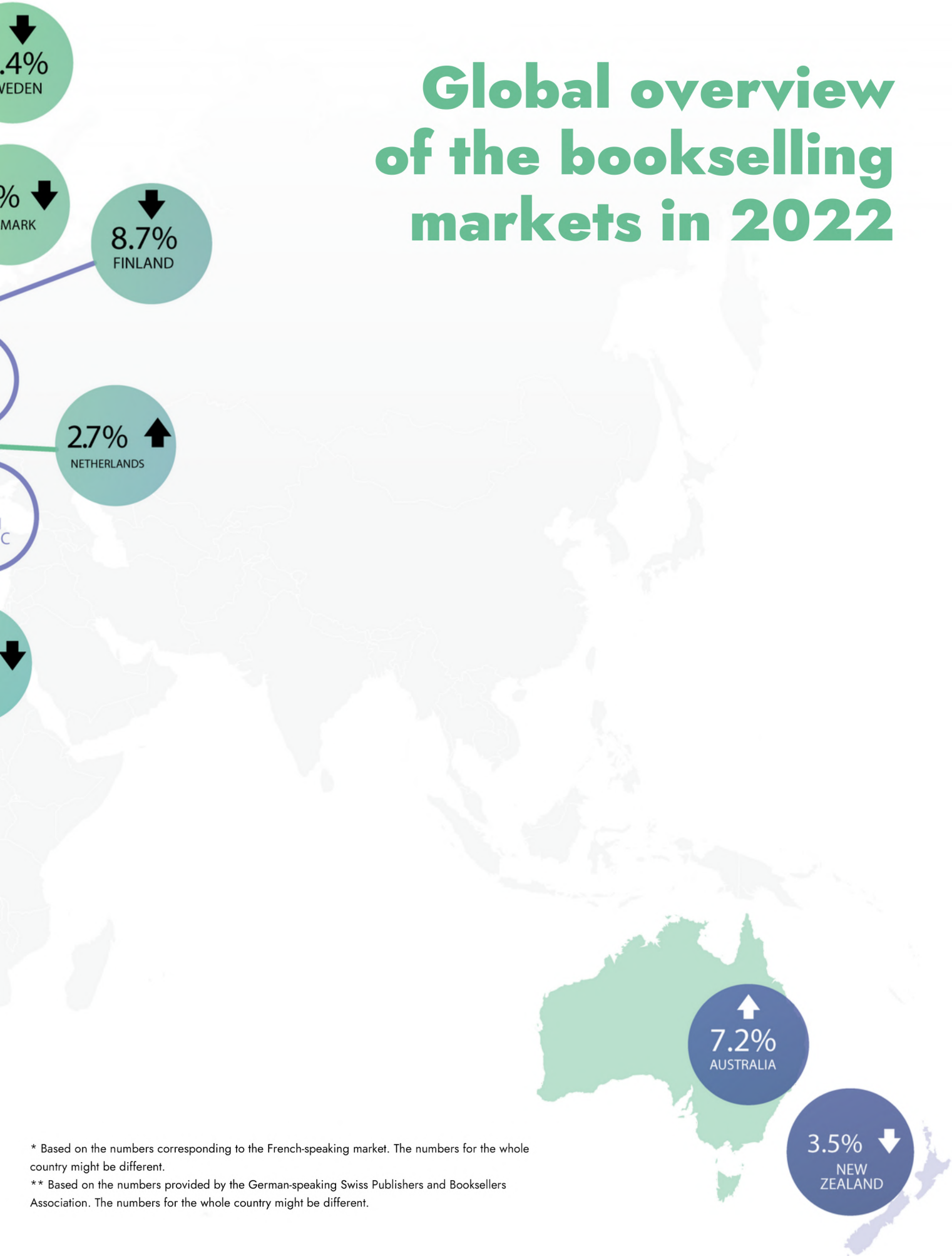
Staff training, digital development, finding solutions to rising costs and strengthening public policies have been identified as the main areas of development for the book sector



In more than half of the surveyed markets, post-COVID customer buying habits influenced sales in 2022



# Global overview of the bookselling markets in 2022



\* Based on the numbers corresponding to the French-speaking market. The numbers for the whole country might be different.

\*\* Based on the numbers provided by the German-speaking Swiss Publishers and Booksellers Association. The numbers for the whole country might be different.

# Analysing the new trends impacting the global bookselling industry

## Extraordinary vs normal growth: 2021 vs 2022

2021 set a record high for book sales across the world, registering the highest turnover in 10 years for many national markets and unprecedented record numbers at Christmas. This overall growth was as exceptional as the circumstances in which it occurred, that is, amid the COVID-19 pandemic. The latter turned our entire lives upside down, forcing many retailers to rethink their entire business models.

In many ways, if those outstanding numbers were excellent and encouraging news, they were not associated to a 'normal' year for the book sector. Markets like France, Belgium or Italy, declared bookshops as essential businesses, which allowed for a certain level of 'normality' in footfall and turnover, especially as most other cultural venues were still closed. At the same time, some other countries, like the Netherlands, kept their bookshops closed for the 2021 Christmas season.

*"2021 was an exceptional year due to bookstore being maintained open in France as essential stores. 2022 was a more normal year.*

*Still it was far better than 2019 (+7%)."*

**Syndicat de la librairie française**

*"When looking only at the market, in 2020 and 2021, there was a decrease in sales but less than one would expect, as many customers tried to help independent businesses – bookshops included – maintaining regular orders even during lockdowns."*

**Portuguese Independent Bookshops Network (ReLI)**





By the start of 2022, as bookshops gradually started to fully reopen throughout the world, the sales scenarios for physical bookshops began to vary in each country. Having turned the page on the pandemic, the book industry had to readjust to a more ordinary landscape. In consequence, when comparing 2021 to 2022 sales, many of the markets have experienced a slight decline. Yet, the good news is that in many markets, 2022 data still exceed pre-pandemic sales numbers.

The reopening of bookshops showed how much people love their local stores, but the staggering inflation and energy crisis –triggered by the breakthrough of Russia’s invasion in Ukraine- has posed a new big challenge for the sector, which saw the increased price of books affect sales throughout the year.

*"In 2022, we registered a decline in turnover of 2.1 per cent across central sales channels compared to 2021."*

**German Booksellers and Publishers Association**

*"Total book sales were down 5% in 2022 compared to 2021. Fiction print sales increased by 8% (with romantic fiction doing very well, poetry not so much) and children’s audio increased by 11%. Non-fiction sales fell across all formats with non-fiction ebook sales falling by 15% however travel guides performed well (probably artificially inflated due to the pandemic stopping a lot of travel sales in previous couple of years)."*

**Booksellers Association of the UK and Ireland**



## The effect of inflation on consumer spending

Throughout 2020 and 2021, booksellers proved to have great resilience towards the implacable impact of the pandemic. Bookshops quickly adapted to their changing environment by adopting new ideas, making it able to cater for the needs of their readers. As such, booksellers never lost touch with their customers during the pandemic and kept demonstrating how vital they are for their local communities.

By the time bookshops reopened their doors in 2022, with most countries fully lifting restrictions to access indoor spaces, consumers eagerly came back to their brick-and-mortar stores. Thus, highlighting the importance of physical spaces and the role of bookstores as hubs for their community, not just retail spaces.

*"After lockdown and stay-at-home-holidays people changed their leisure behavior. With inflation (and the increasing prices) and the return of mobility the «sale tourism» is back in Switzerland. Swiss people are going across the border to Austria and Germany to buy books (and also non-books and food) for a cheaper price. [...] Booksellers are confronted with price sensitivity on a very high level and much more than other retailers."*

**Swiss Booksellers and Publishers Association**

*"Generally optimistic regarding sales – readers are still in the market – but inflation is making it challenging to maintain margins and the supply chain difficulties remain for our market that is so reliant on international logistics."*

**Booksellers Aotearoa New Zealand**

*“The war in Ukraine, energy crisis, paper crisis all influenced our country in 2022. For example, price and availability of paper influenced the size of the print runs, which for some bestsellers were too small, there were gaps in availability. And of course, increased prices in all areas and uncertainty about future affected purchasing capacity.”*

**Latvian Booksellers Association**

*“General inflation has affected a lot the consumers way of spending money, also the ability to spend it. This is due to war in Ukraine, energy crisis etc. We still see that book has its potential as its price is relatively not so high.”*

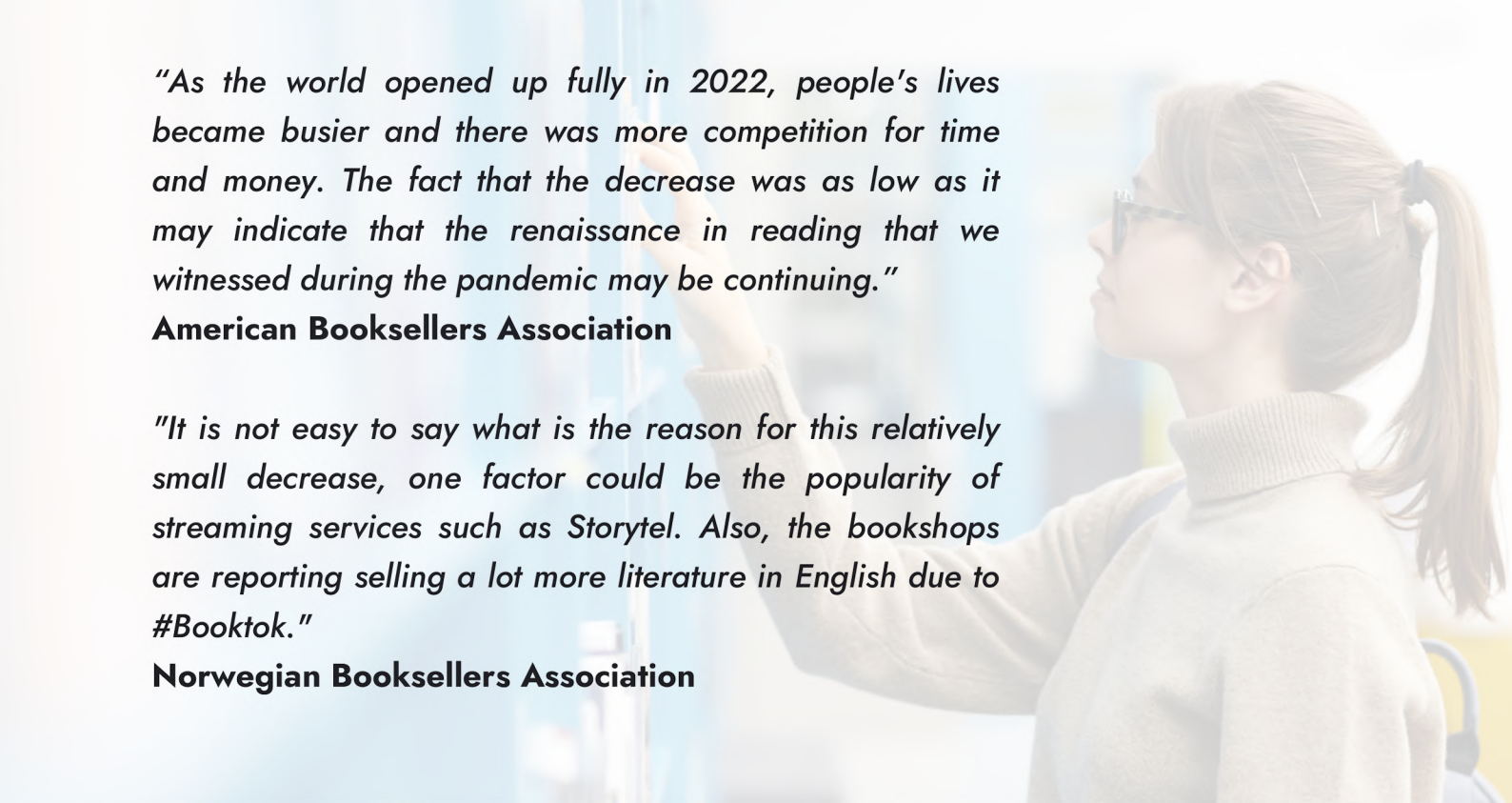
**Finnish Booksellers Association**

However, the rising energy costs and the global economic inflation we’ve seen throughout 2022, impacted customers and booksellers alike. It triggered a decrease in sales across the board, prompted by increased book prices and a smaller spending capacity from customers.

For bookshops, costs associated with the running of their business were greatly impacted by these new economic constraints, particularly by soaring electricity costs, staff shortages and smaller margins. These new obstacles are still particularly challenging for independent businesses, that have less leeway to absorb costs and are competing with chains and internet giants.

Nonetheless, most EIBF members agree that bookshops remain highly regarded by their customers, who are in many cases loyal to their local store and see their value as community hubs, prioritizing these qualities over lower prices offered by other competitors.





*“As the world opened up fully in 2022, people’s lives became busier and there was more competition for time and money. The fact that the decrease was as low as it may indicate that the renaissance in reading that we witnessed during the pandemic may be continuing.”*

**American Booksellers Association**

*“It is not easy to say what is the reason for this relatively small decrease, one factor could be the popularity of streaming services such as Storytel. Also, the bookshops are reporting selling a lot more literature in English due to #Booktok.”*

**Norwegian Booksellers Association**

## **Adjusting to post-COVID customer trends**

2021 proved to be full of heartwarming stories about customers supporting their local bookshops and about booksellers adopting new ideas to provide their customers with books. In 2022, several new factors came into play, thus reshaping sales trends.

The total lifting of covid restrictions in 2022, with the subsequent reopening of other cultural venues, meant that booksellers were back to competing with other cultural and leisure activities. Additionally, the decision of some companies to not bring their employees back to the office full-time had an impact for bookshops located in urban areas, which saw a decline in their footfall. These reasons, combined with a more limited purchasing power, largely account for the reshaping in customers’ buying habits.

Nevertheless, it is safe to say that customers have remained loyal supporters of their bookshops throughout 2022. While the impact of inflation made them cut back on the consumption of certain goods, including purchases related to culture, some customers are still dedicating a part of their budget to buying books. In this regard, some of the analysed markets reported decreasing sales in volume, but also noted that many bookshop customers bought more books per visit.

As for what people read, the fiction genre remains the favourite. It is also worth noting that travel books recovered from a steep decline in 2021, sparked by the revitalisation of tourism. 2022 also saw the growing popularity of #BookTok, driving up the sales of the titles trending in this community. Finally, streaming platforms –audiobooks and ebooks– kept growing throughout 2022, albeit more moderately than in 2021.

## Looking ahead: What's next for the bookselling sector

Undoubtedly, there are different major challenges that lie ahead for the bookselling industry. How booksellers decide to answer them now will be key to shape what the business look like tomorrow.

On a global level, the rising costs and inflation that are currently plaguing the world economy will undoubtedly leave a long-lasting impact across many sectors. In the book trade, these phenomena translate into a series of difficulties that affect the entire book chain, from the production of books to their sale on bookshelves.

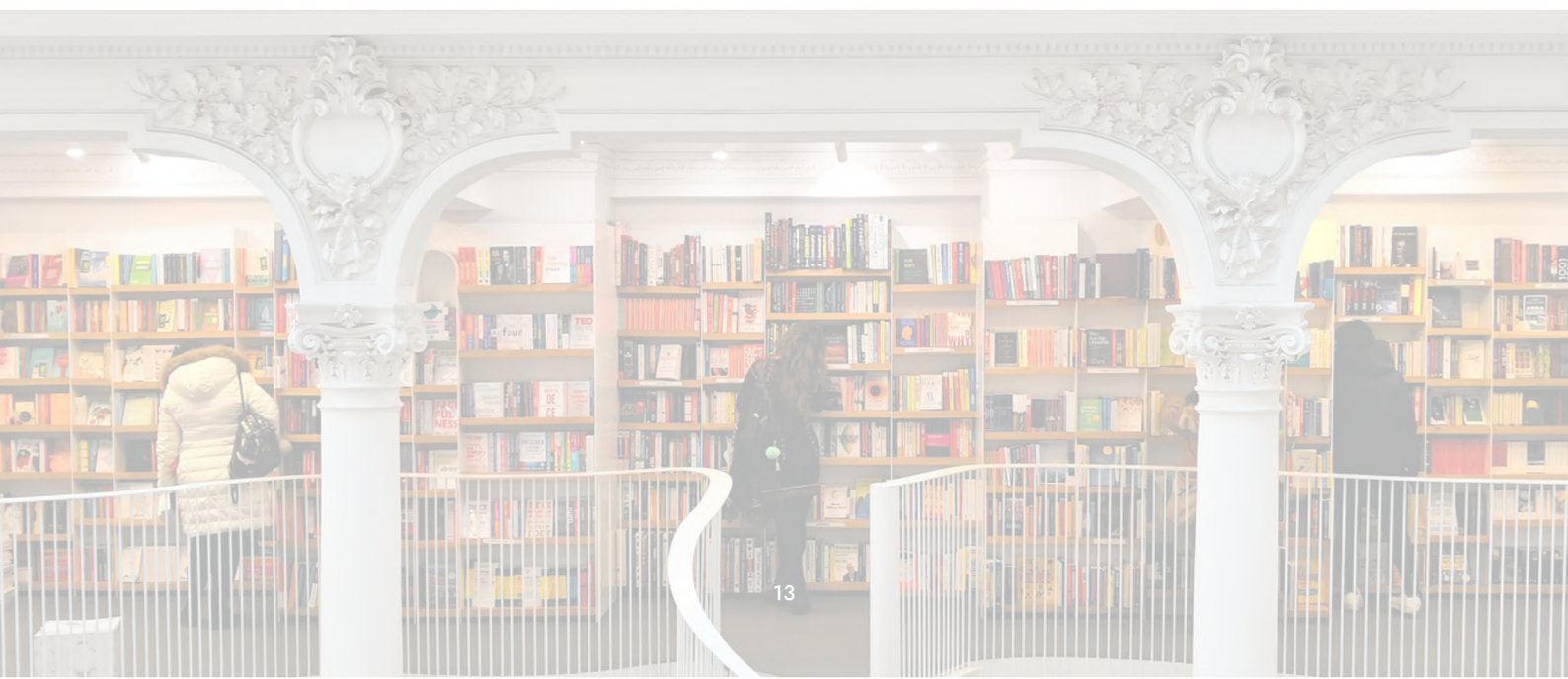
However, if there is one thing that characterises this industry, it is its resilience and determination. By now, booksellers have proven time and again, their ability to adapt and keep up with the changes of the market. In this sense, most of the surveyed booksellers associations explained that their priority in the near future is to make the sector more competitive by focusing on various areas of development.

*"The public sector should be advised/encouraged to buy from independent and local businesses and not to feed big multinational companies."*

**Portuguese Independent Bookshops Network (ReLI)**

*"In 2022, digital tools development continued, thanks to the aid of Regional, State and European governments. The main objective is to continue modernizing and improving competitiveness, facing the current crisis situation, and achieving growth in 2023."*

**Spanish Booksellers Association**



*"Our focus this year is on BA Learning, and making sure we are delivering professional development tools to members, on fighting the impacts of the cost-of-living crisis on booksellers, on working on diversifying bookselling as much as we can and on collaborating on sustainability for bookshops."*

**Booksellers Association of the UK and Ireland**

*"Our focus is on finding solutions to the increasing energy and transport costs, which make the whole logistic slower and much more expensive."*

**Swiss Booksellers and Publishers Association**

One of their main priorities is to work together with national governments to develop further public policies that will protect and boost the bookselling sector.

Additionally, many of the surveyed associations intend to implement and/or improve the digital tools available for booksellers, with the objective of increasing efficiency and making logistics more robust.

Lastly, all the surveyed associations agreed that the evolution of the sector is underpinned by a properly trained staff. In this regard, many of EIBF's member associations will work directly with their own members to provide training and upskilling opportunities, advocate for the protection of their working conditions and foster workforce diversity and mental health support.



## 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.

## What we do



### BEST PRACTICE

We provide a forum for discussion and cooperation among our members, facilitating the exchange of ideas and best practices

### REPRESENTATION

We meet decision-makers in institutions to explain the specificities of the bookselling industry



### INDUSTRY NEWS

We regularly inform members about news and updates in the bookselling industry, as well as any legislation impacting the sector

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

© 2023 European and International Booksellers Federation

**European and International Booksellers Federation - EIBF**

Square Marie-Louise 69  
1000 Brussels  
Belgium

Contact: [info@eibf.eu](mailto:info@eibf.eu)  
Visit: [www.eibf.eu](http://www.eibf.eu)  
Tel: +32 (0) 2 580 18 11

