



Featured Talk

Readers' Choices

Analyzing and Adapting to Consumer
Trends with Circana BookScan



BRENNNA CONNOR

Monday, February 24 | Plaza Ballroom | 5:50 PM - 6:30 PM

Housekeeping



This session will take approximately
60 minutes



There will not be a Q&A given the size of
the audience



Attendees have access to a copy of the
presentation deck on the Wi2025 app

A reminder that this presentation, and all Circana's data and reports, fall under Circana's standard data disclosure policy and may not be disclosed, in whole or in part, with anyone outside of your organization without the express written consent of Circana.

Circana BookScan

World's first and largest continuous sales monitoring service



BARNES & NOBLE



600,000
ISBNs

16,000+
Locations

14 Million
Units

85%
Of U.S. Retail Sales



BookScan's Retail Panel

- AAFES
- Aerio (through Week 15 2023)
- Amazon.com
- Babies "R" Us (through Week 27 2018)
- Barnes & Noble**
- Barnes & Noble College
- Bass Pro Shops
- Bed Bath and Beyond
- BJs
- Bloomingdale's**
- Bodhi Tree (no longer reporting)
- Books-A-Million**
- Book-Pal.com
- Bookshop.org
- Boscov's**
- BuyBuy Baby
- Cabela's
- CatholicCompany.com (no longer reporting)
- Christianbook.com
- CNI
- Cokesbury.com
- ComicHub (see full list below)
- Cornerstone (no longer reporting)
- Costco
- Deseret Book Company**
- Family Christian (through Week 09 2017)
- Fleet Farm
- Follett Stores (through Week 40 2022)
- Gamestop**
- Givingtons.com
- Hastings (through Week 42 2016)
- HEB**
- Home Shopping Network (HSN)**
- Hudson Group
- HyVee
- **Independent Bookstores (1,200)**
- IndiePubs.com
- Jet.com (through Week 1 2020)
- K-Mart (through Week 10 2020)
- Kohl's**
- Kroger
- Learning Express
- Lifeway (through Week 44 2019)
- Lifeway.com
- Macy's Stores**
- Mardel
- Meijer
- MicahTek, Inc.
- Michaels**
- MusicToday.com
- Navy Exchange**
- Nordstrom**
- Office Depot**
- Parable Stores (200)
- Peebles (through Week 10 2020)
- Porchlight Book Company (formerly 800-CEO-Read)
- Powells.com
- Premiere Collectibles
- PuppyDogsAndIceCream.com
- Quarterly.com (no longer reporting)
- QVC
- RabbitRoom.com
- REI**
- RevDistribution.com (no longer reporting)
- Sam's Club**
- Seagull Books
- ShopKo (through Week 17 2019)
- ShopRite (no longer reporting)
- Stage Stores (through Week 10 2020)
- Staples**
- Starbucks (through 2018)
- Stellar Airport Stores (January 2019 forward)
- Stop & Shop (through Week 30 2017)
- SuperValu
- Target**
- TheBookCo.com
- The Container Store (no longer reporting)
- The Parable Group (see full list below)
- Toys "R" Us (through Week 27 2018)
- Transworld (300 FYE stores)
- Walmart**
- Wegmans
- Zulily

We have partnerships with over
1,000+ book retailers
in the U.S. covering

85%

of the **print
book market.**

**includes .com

Even the **smallest stores**
can have a
big impact.

Learn more about reporting
to Circana BookScan. Email
bestsellers@bookweb.org.



BookScan Use Cases For Independent Bookstores

Stay informed about market trends

Keep track of titles important to your success

Create sales opportunity

Discover new and missed opportunities

Check that you are stocking the most important books



Research the best books for a new category

Be aware of exactly what's selling around your store, not just in your store

Maximize opportunities while also being uniquely you

Access easy-to-use title and bestseller service

BookScan is free to ABA reporting retailers

Circana Books Datasets

Circana Books is the market leader in U.S. Book data



CIRCANA BOOKSCAN™

Print book POS

1,000+ retailers

14M units weekly

85% of U.S. market



PUBTRACK DIGITAL

E-book & audiobook sales

Publisher reported

Top 450 e-book publishers

4 of top 5 audio publishers

Monthly release



BOOKSCAN LICENSE REPORTING

3,000+ licenses

180M units in 2024

22% overall market

35% of kids' books



Today's agenda

- 01 U.S. Retail Trends
- 02 U.S. Books Performance
- 03 Trends to Watch
- 04 Look Ahead



01

U.S. Retail Trends

We capture the complete ...
\$3.3T retail market across **8 segments**



Complete Food
& Beverage



Home



Fashion



Complete Beauty
& Health



Entertainment



Technology



Tobacco

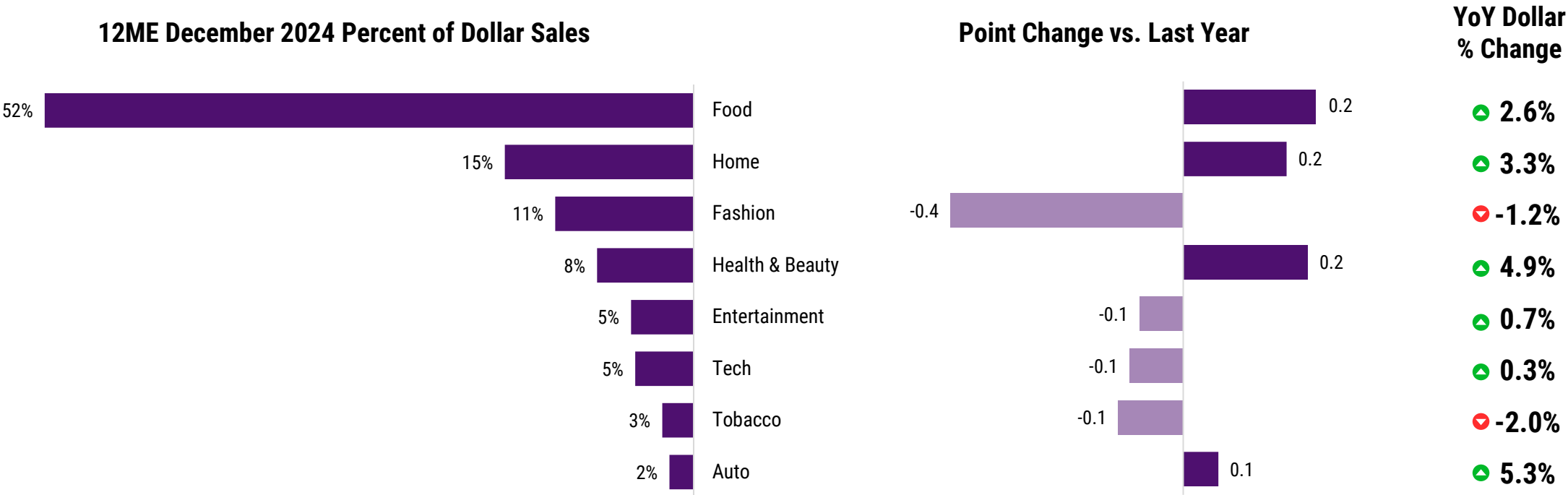


Auto Aftermarket
& Tires

Source: Circana, Checkout (accessories, auto, consumer electronics, furniture, home décor, home improvement, home textiles, housewares, juvenile, office supplies- excludes janitorial/breakroom, small appliances, sports equipment- includes team sports, toys); Consumer Tracking Service (apparel, footwear); Retail Tracking Service (auto tires, cycling, prestige beauty); BookScan™ (books- MSRP sales); Market Dynamics Report (video games); CREST® (foodservice); Circana, Total Market View MULO+ with Conv & Perimeter and EMI 3P

2024 total retail dollar share shifts

In the 12ME December 2024, food, health & beauty, and home segments gained the most share at the expense of fashion industries.



Source: Circana, Checkout (accessories, auto aftermarket, consumer electronics, furniture, home décor, home improvement, home textiles, housewares, juvenile, office supplies- excludes janitorial/breakroom, small appliances, sports equipment- includes team sports, toys); Consumer Tracking Service (apparel, footwear); Retail Tracking Service (auto tires, cycling, prestige beauty); BookScan™ (books- MSRP sales); Market Dynamics Report (video games); CREST® (foodservice- includes Commercial and Non-Commercial Foodservice, Direct Consumer Spend); Total Market View MULO+ with Conv & Perimeter and EMI 3P (F&B and non-edible CPG, 52WE 12.29.24), 12ME December 2024 vs. LY General merchandise January 2024 dollars multiplied by 0.8 to adjust for the 53rd week

Despite headwinds in 2024, retail spend increased

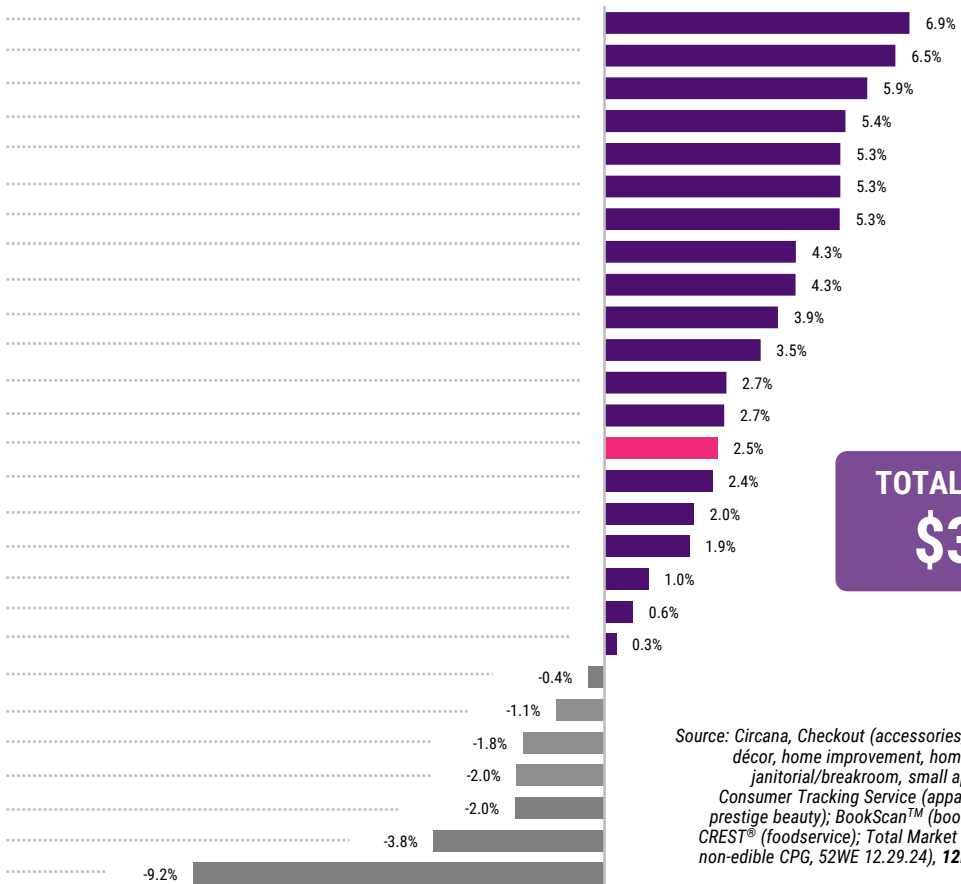
Books were a bright spot among discretionary industries



12ME
DOLLAR VOLUME (\$B)

\$17	Home Décor
\$34	Prestige Beauty
\$44	Home Textiles
\$32	Sports EQ/Team Sports
\$86	Mass Beauty & Personal Care
\$32	Housewares
\$63	Auto Aftermarket/Tires
\$133	Healthcare
\$51	Pet
\$113	Home Improvement
\$44	Homecare
\$43	Small Appliances
\$1,031	Retail Food & Beverage
\$15	Books
\$671	Foodservice
\$97	Other Consumables
\$42	Toys
\$32	Furniture
\$33	Accessories
\$153	Tech
\$89	Footwear
\$59	Video Games
\$241	Apparel
\$23	Office Supplies
\$82	Tobacco
\$10	Juvenile
\$6	Cycling

Year-over-year Dollar Percent Change



TOTAL DOLLARS:
\$3.3T

+2.2%
vs. LY

Source: Circana, Checkout (accessories, auto aftermarket, consumer electronics, furniture, home décor, home improvement, home textiles, housewares, juvenile, office supplies- excludes janitorial/breakroom, small appliances, sports equipment- includes team sports, toys); Consumer Tracking Service (apparel, footwear); Retail Tracking Service (auto tires, cycling, prestige beauty); BookScan™ (books- MSRP sales); Market Dynamics Report (video games); CREST® (foodservice); Total Market View MULO+ with Conv & Perimeter and EMI 3P (F&B and non-edible CPG, 52WE 12.29.24), 12ME December 2024 vs. LY; General merchandise January 2024 dollars multiplied by 0.8 to adjust for the 53rd week

Foodservice includes Commercial and Non-Commercial Foodservice, Direct Consumer Spend

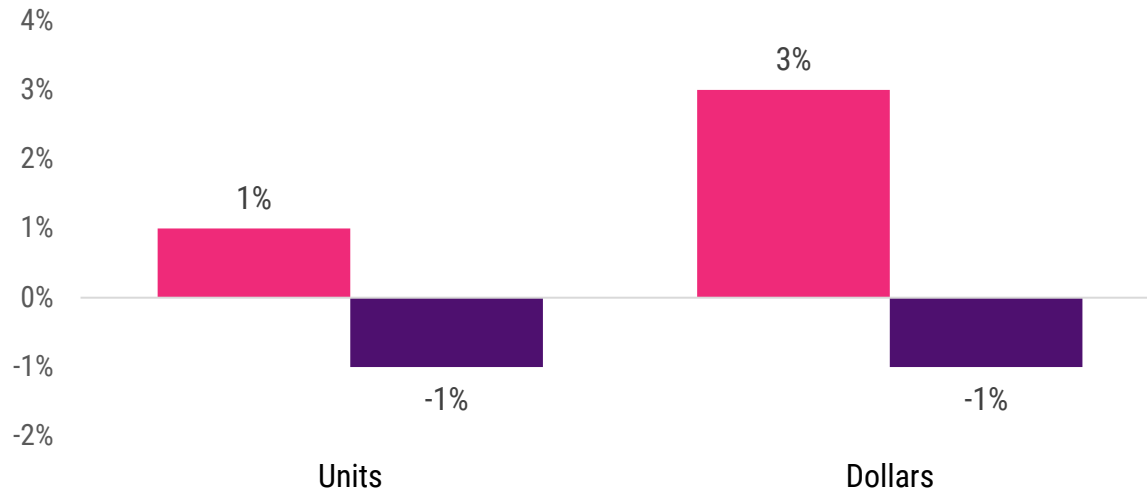
A stronger holiday for books

Print book sales grew faster than other discretionary categories during key holiday season

Fourth Quarter Sales Change

2024 vs. 2023

■ Books ■ Gen Merch





02

U.S. Book Market Performance

A top-down view of two people lying on a grey and white striped rug, reading open books. The person on the left has long brown hair and is wearing a blue denim jacket over a white shirt. The person on the right has dark curly hair and is wearing a blue long-sleeved shirt. The background is a plain, light-colored wall.

U.S. Print Book Market 2024 Performance

Unit sales were **up 1%**

MSRP dollars were **up 3%**

2024 performance drivers

Annual print units grew 1%; Dollars grew 3%

Adult fiction drove nearly all (95%)
of sales growth

Escapist themes and **#BookTok** key areas of
growth in adult fiction

Juvenile non-fiction and **young adult non-fiction** also
pockets of growth

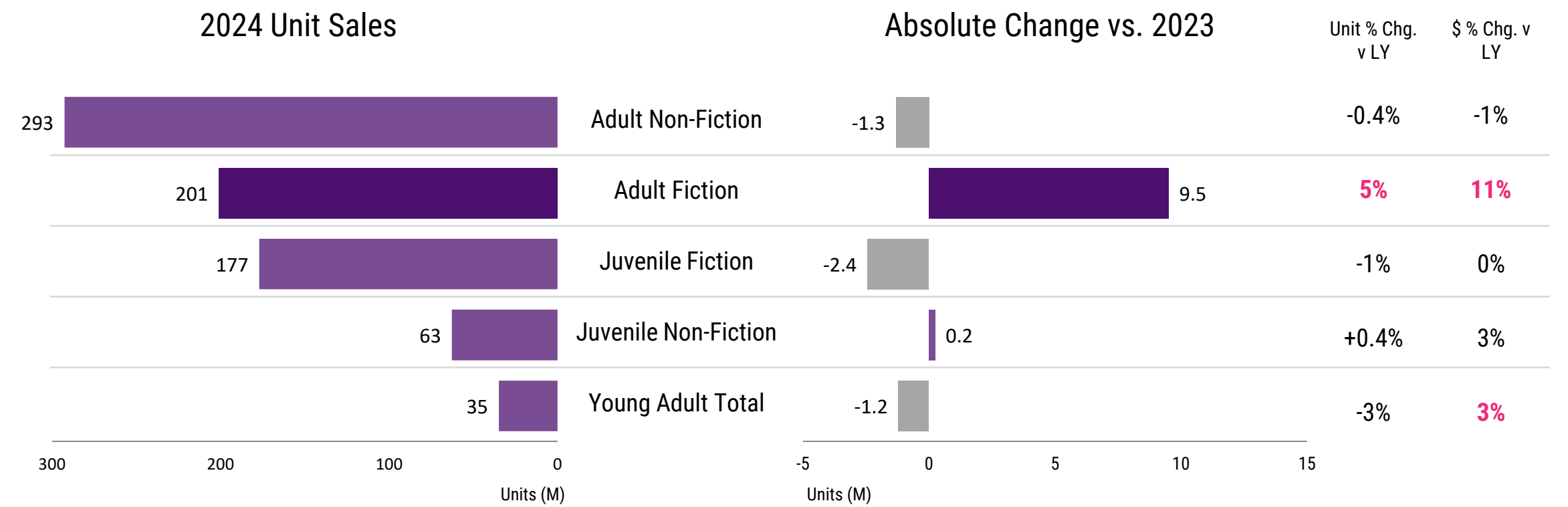
Kids' fiction drove the steepest declines; **middle readers**
biggest underperformer

Continued strength in **digital audio** and
ebook formats



Adult fiction drove gains in 2024

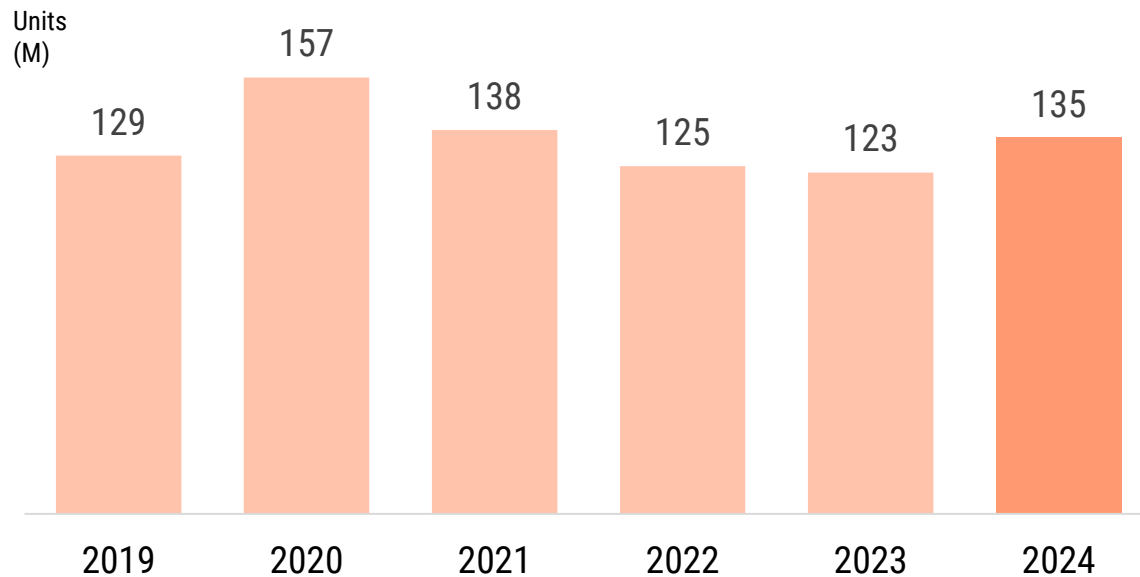
Adult fiction lead market growth and juvenile non-fiction had a positive finish. All other major supercategories are down -1% or less over prior year.



E-book sales volume up 10%

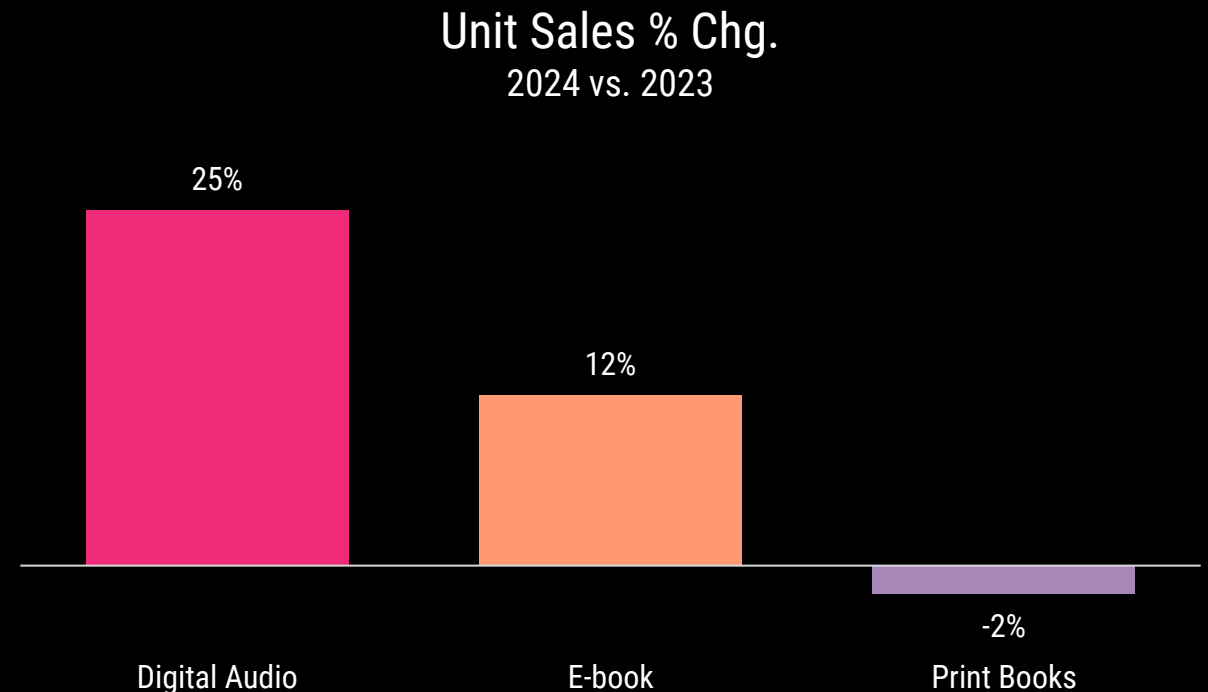
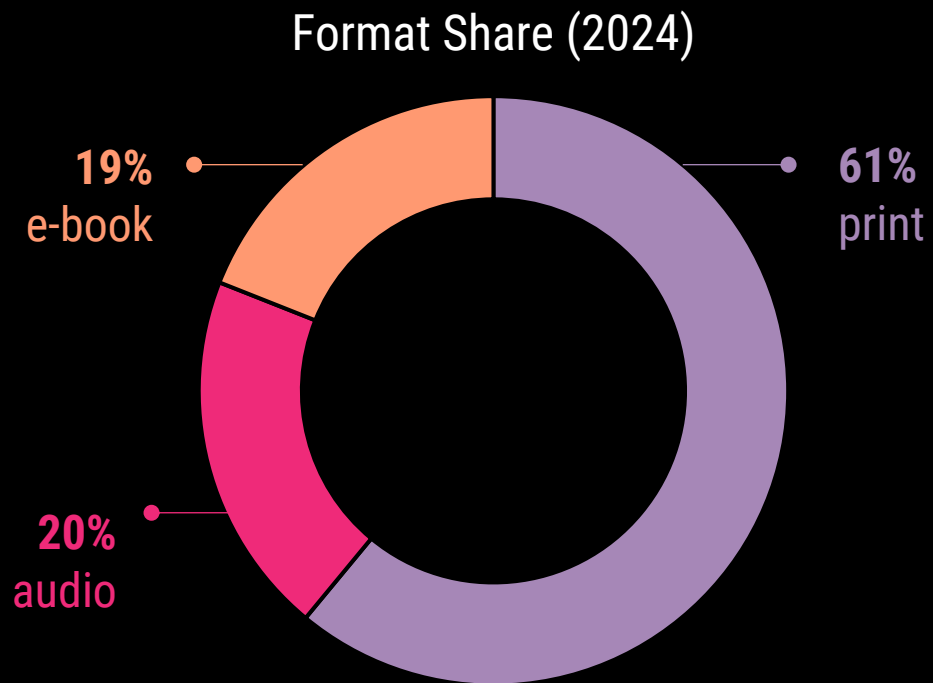
Sales across all major supercategories are up and adult fiction subjects are driving the gains

E-Book Sales YTD Trend



Combined format sales (audio sub-group)

Digital audio remains the fastest-growing book format of the year. In 2024, digital audio surpassed ebook volume among this group of publishers.



The background is a dark, deep blue space. A perspective grid of thin, glowing lines in shades of blue and purple extends from the bottom towards the horizon. On the right side, there are soft, ethereal clouds of purple and pink light. The overall aesthetic is high-tech and futuristic.

03

Trends to
Watch

Adult Market Drivers

Key factors impacting sales growth in the adult book market

1

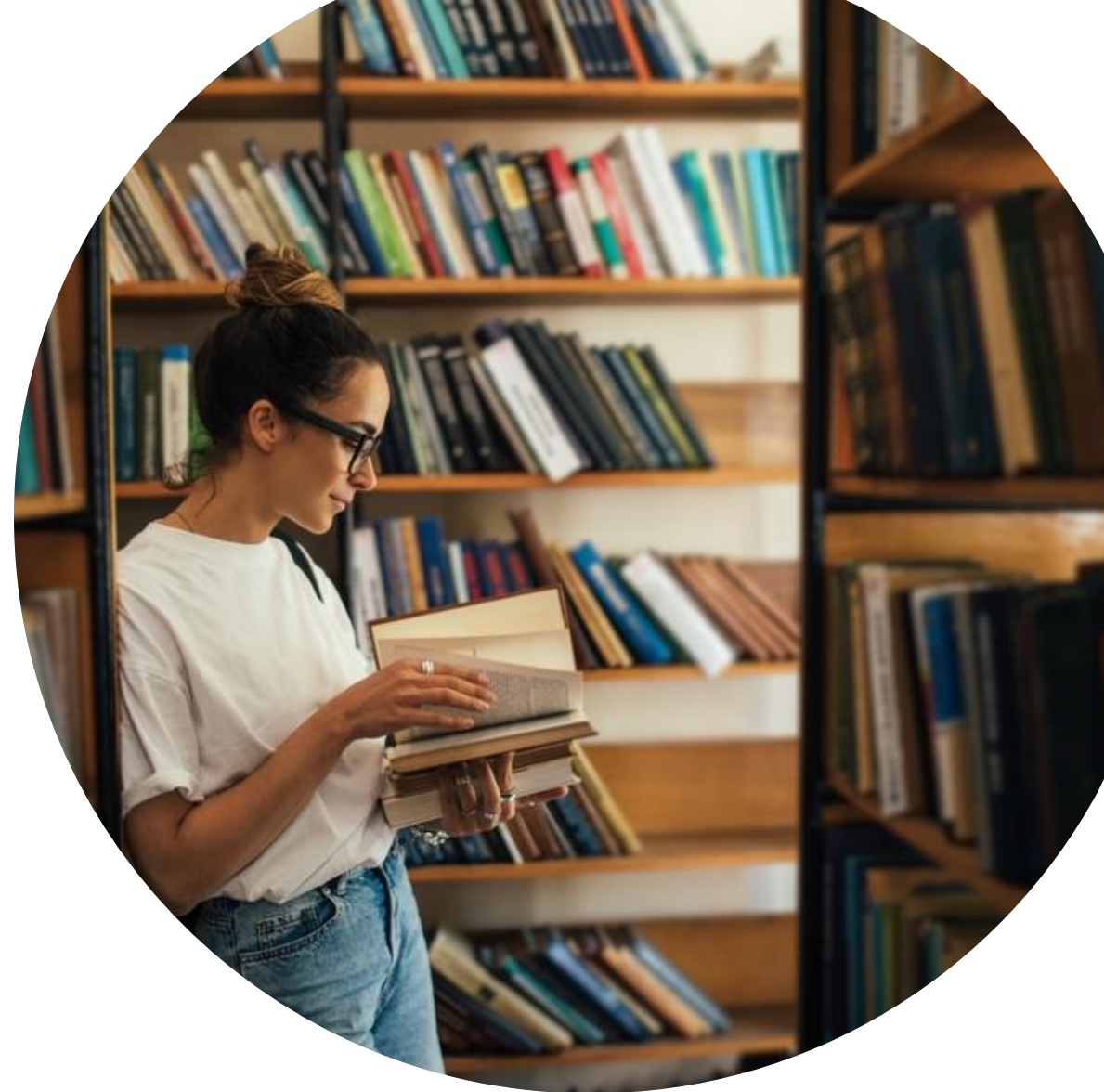
Escapist themes, #BookTok, and deluxe editions

2

Religion topics including Bibles and Christian life

3

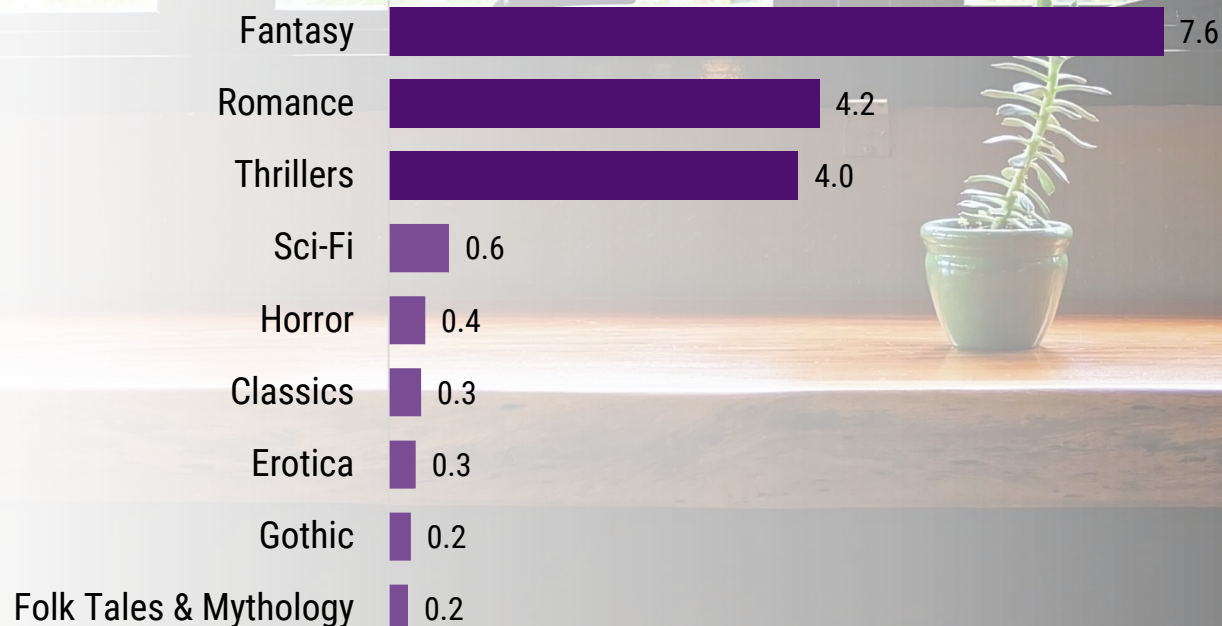
Shift to digital formats



Top Trends in Adult Fiction

Adult fiction is the strongest segment of the print book market posting six years of consecutive sales gains

Highest Growth AF Subjects



Unit sales growth (M)
2024 vs. 2023

#BookTok author sales are building momentum

There are more than 38 million posts tagged as #BookTok, and BookTok videos have grown by nearly 15 percent in the first nine months of this year compared to 2023*

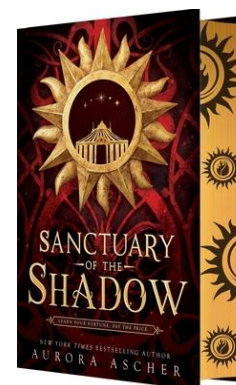
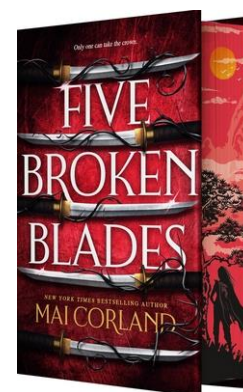
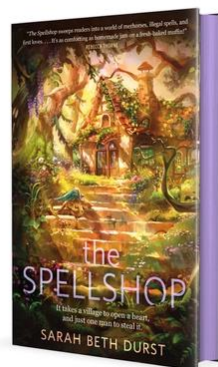
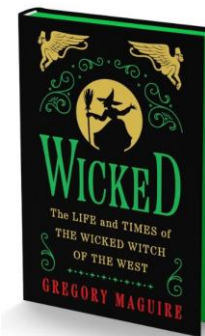
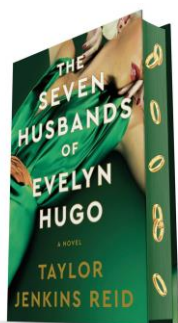
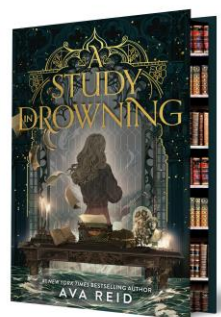
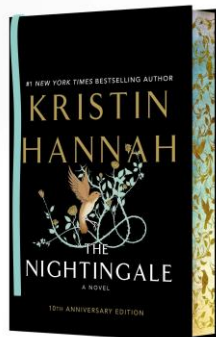
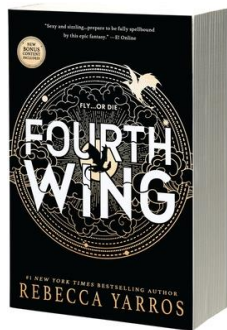


#BookTok author unit sales are up 20% in 2024, marking the fifth year of consecutive growth.

Sales for Deluxe Editions grew

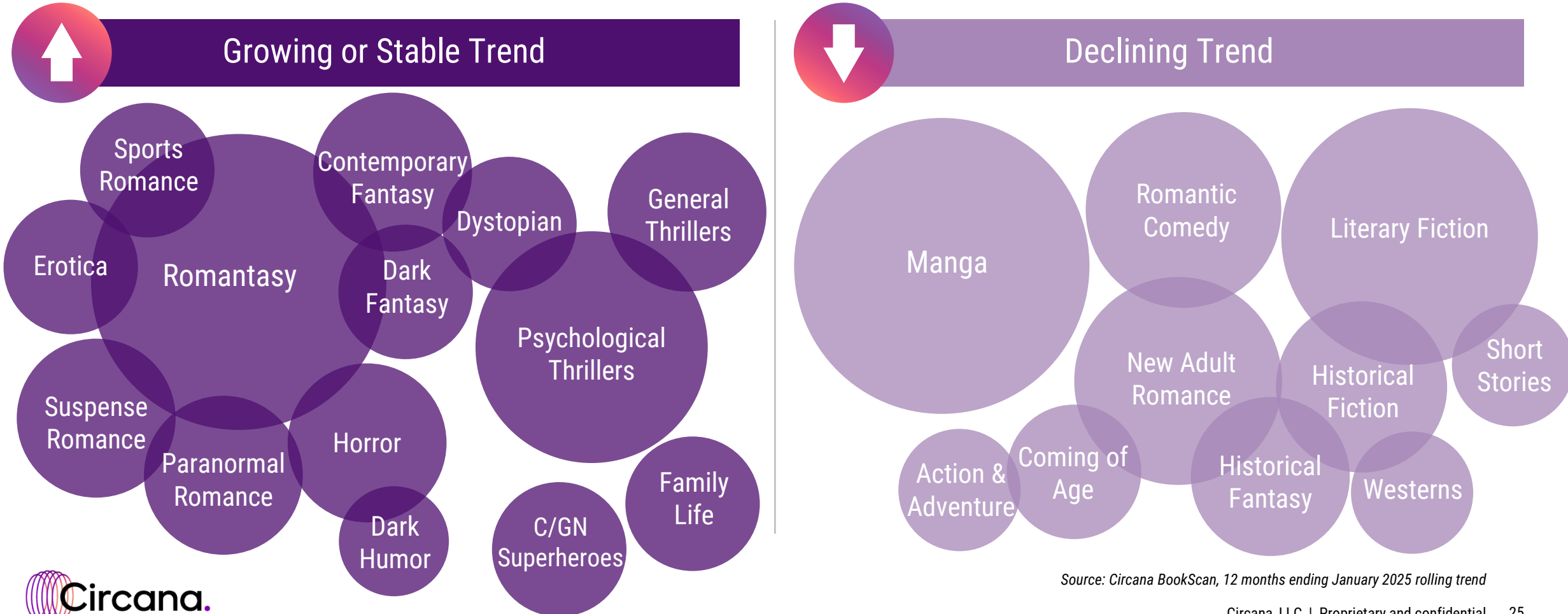
70%

in 2024.



What's next in Adult Fiction?

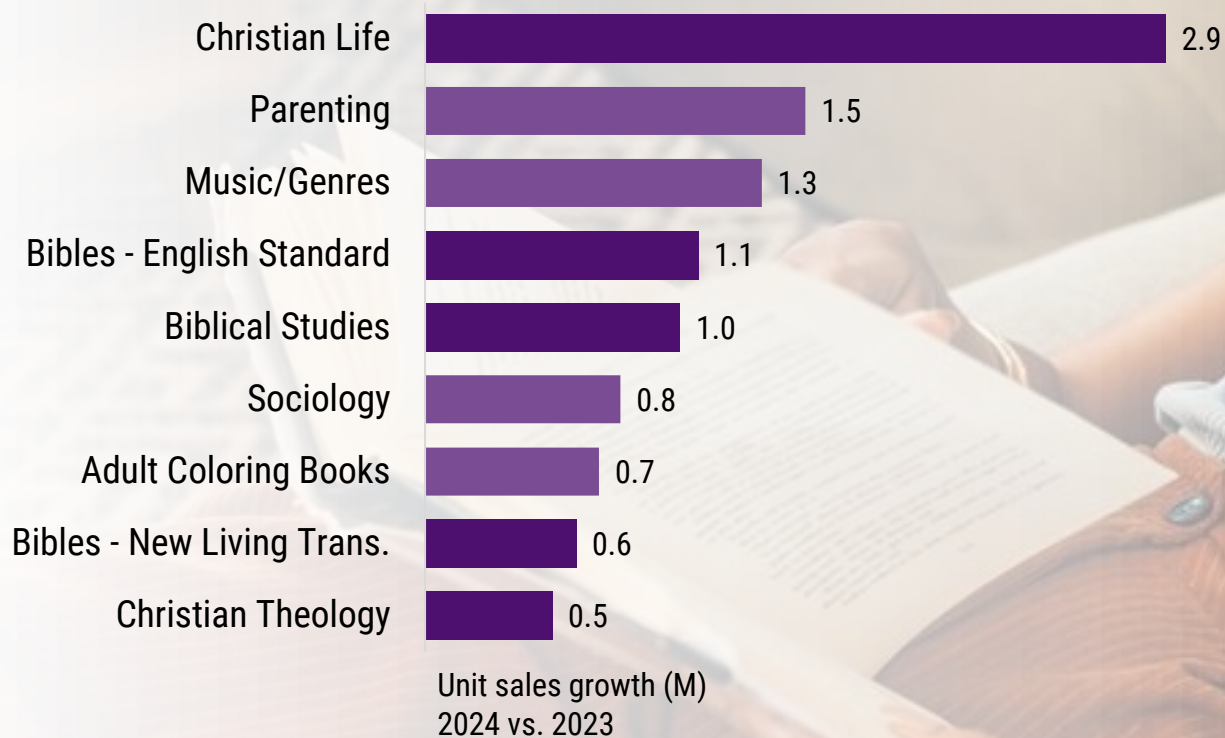
Based on rolling sales trend, expect to see these trends play out in the first half of the year



Pockets of Growth in Adult Non-Fiction

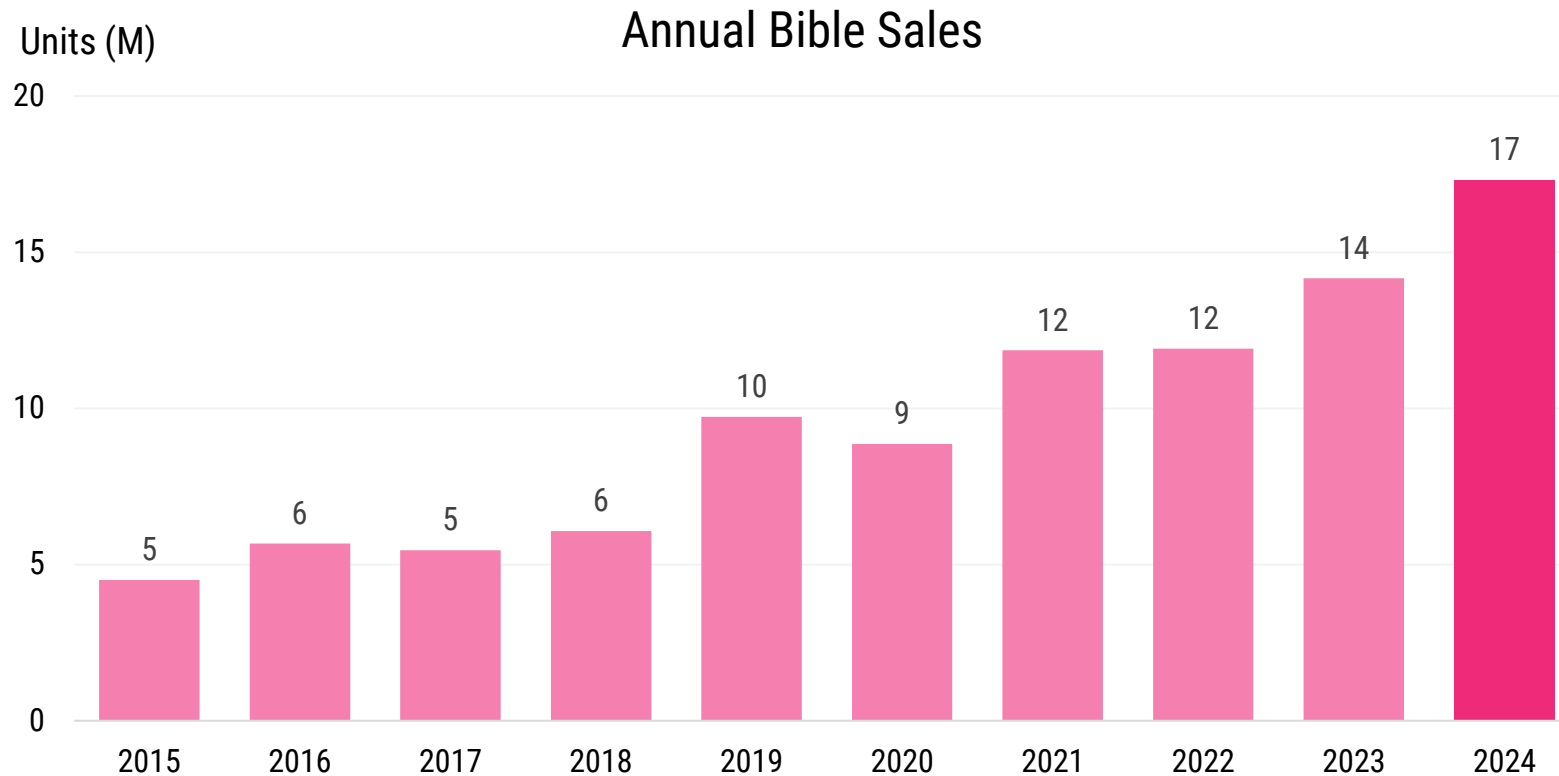
Adult non-fiction print sales have been in decline since 2022.
Christian religion subjects are a key theme among growth areas.

Highest Growth ANF Subjects



Bible sales in the U.S. have hit a record high

Sales of Bibles are booming and showing a long-term growth trend. In 2024, unit sales for Bibles reached 17M, up 22% vs. prior year.

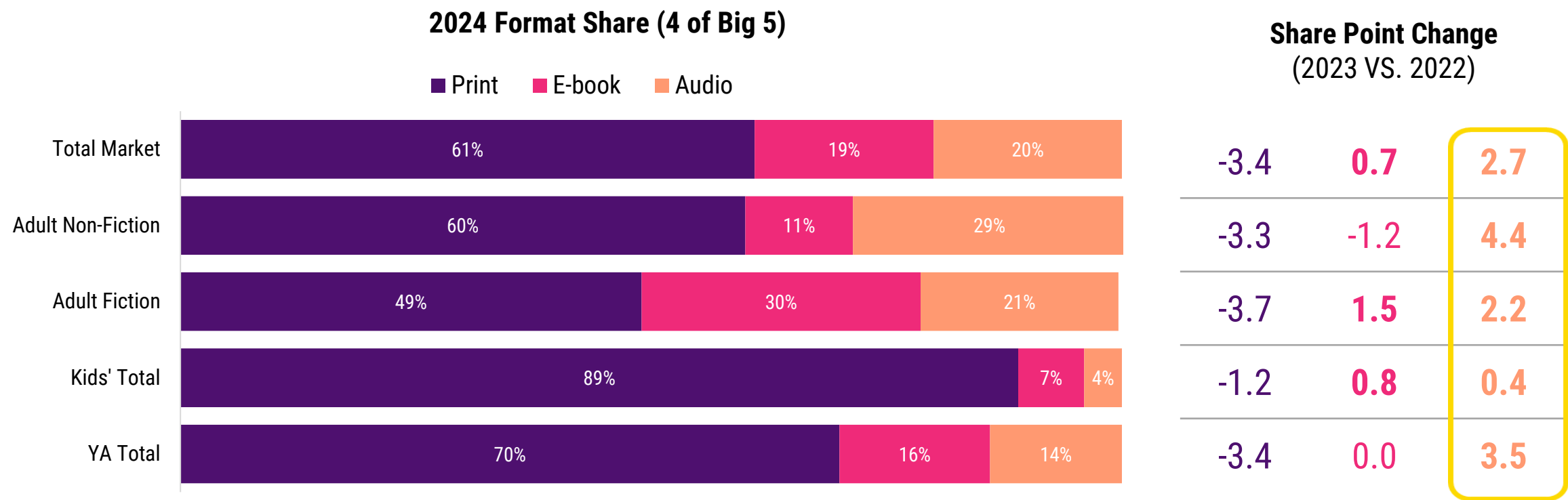


The Wall Street Journal reports the growth in Bible sales is fueled by **first-time buyers** and **new versions**.

Rising anxiety and a **search for hope** may also be factors.

A digital shift is impacting adult format share

Audio is the only format that gained share across all supercategories in 2024 while print share is declining across all formats



This view includes combined data from Hachette Book Group, HarperCollins, Macmillan, and Simon & Schuster



Source: Circana/Circana BookScan, PubTrack Digital, through month ending Nov 2024, digital formats projected Oct-Nov 2024, includes four of the five Big 5 publishers only

Kids' Market Trends

Key factors impacting book sales in the kids' book market

1

Educational materials & activity books

2

Licensed books

3

Bible study and Christian life

4

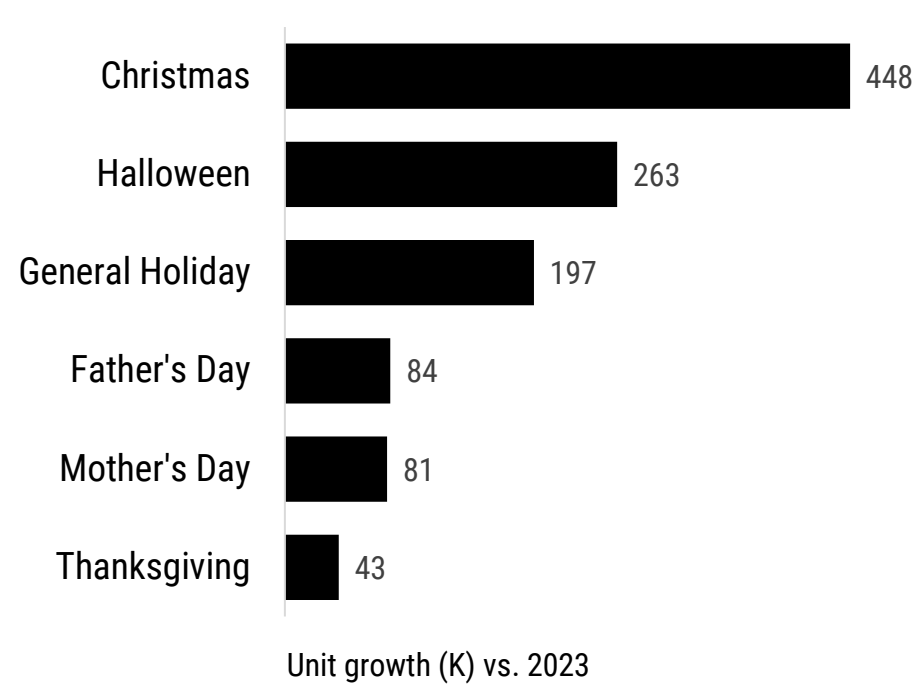
Holiday-themed books



Kids' Holiday Book Sales Boost

Holiday books have been a pocket of growth in the kids' market over the last few years as more consumers turn to books to celebrate festivities and traditions with children

Top Growth Holidays (2024)



Christmas



Halloween



Mother's Day

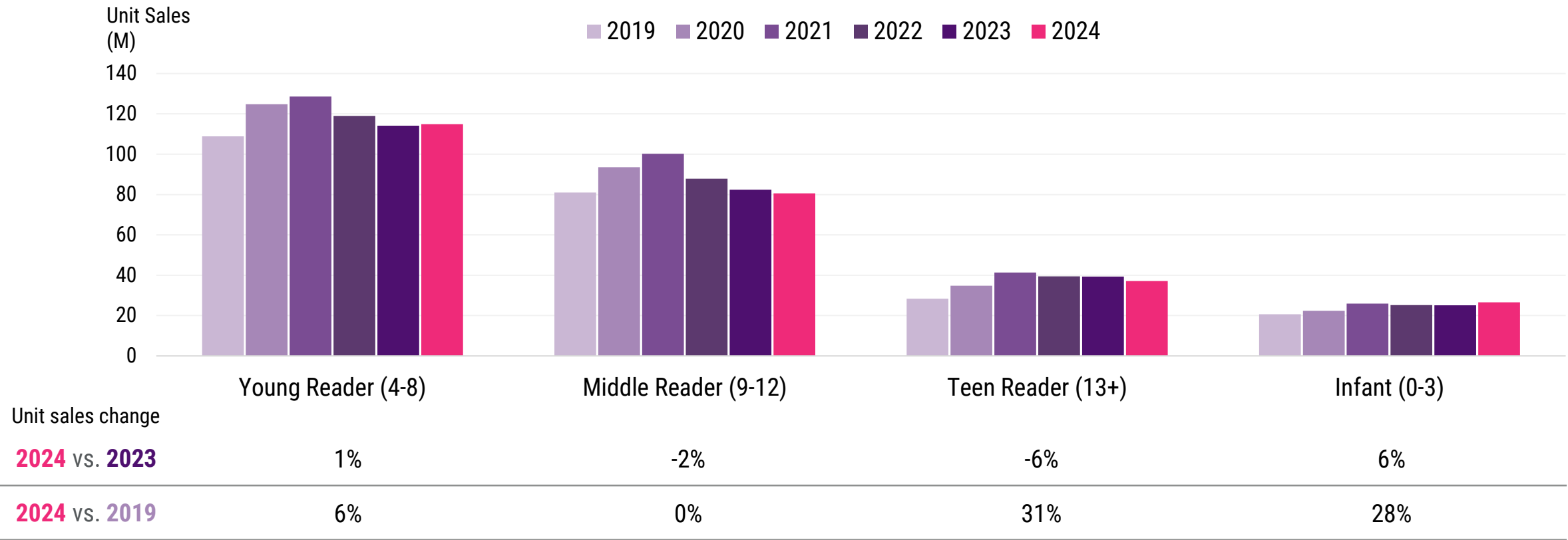


Thanksgiving



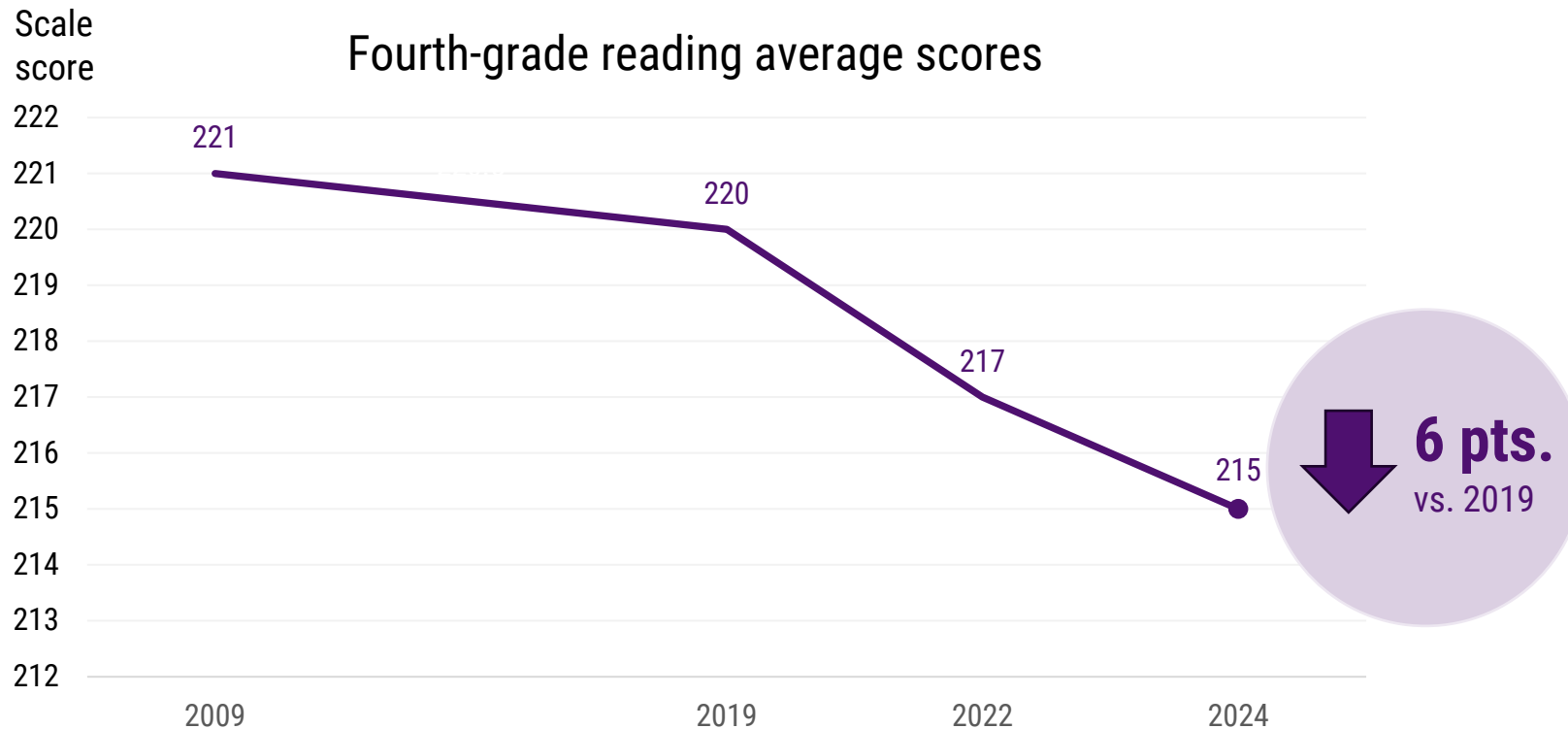
Kids' Sales Trend by Age Range

Middle readers and teen readers are underperforming segments. Books for infants are posting the strongest gains vs. last year.



Decline in reading scores

Fourth-grade reading scores (kids' ages 9-10) declined across all regions in the U.S. from 2019 to 2022



Students in grades one through 12 now spend an average of

98 minutes

on school-issued devices during the day – more than

20%

of the average instructional time.

Trending Content Themes in Kids' Books

Titles and series with the most growth are stories that span these content themes

FAMILY

Themes of connecting with family and importance of family

Examples include "One and Only Family," "Wild Robot" series, Bluey licensed books

ADVENTURE

Themes of quests and survival. Often overlaps with family and mythical creatures.

Examples include "Percy Jackson," "Wild Robot" series, "Spy School" and "The Misfits"

MYTHICAL CREATURES

Including dragons, unicorns, sea monsters, witches and vampires.

"Impossible Creatures," "Wings of Fire," "Percy Jackson," and "Warriors"

FANTASY

Often overlaps with mythical creatures and magical powers.

Examples include "The Nightmare Before Christmas," "Keeper of the Lost Cities" and "Unicorn Academy"





04

Look Ahead

Macroeconomic Trends

Macroeconomic trends are impacting consumer confidence and where and how we spend



Increasing Inflation
CPI rose 2.9%
for 12 ME December



Rising Unemployment
4.1% for December



Debt Ticks Up
Q3'24 Credit Card Debt:
\$1.17 Trillion



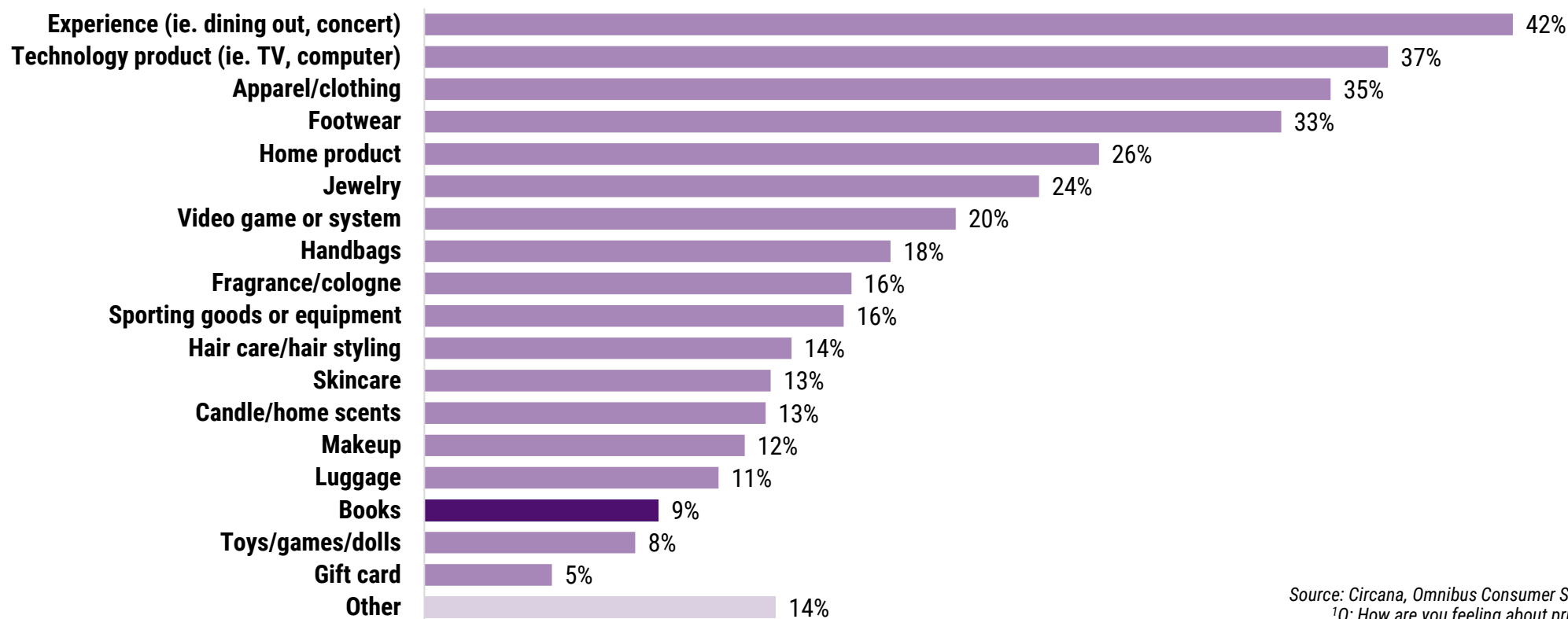
Declining Interest Rates
4.5%



Books are more secure from pricing pressures

83% of consumers feel that prices are too high.¹ As consumers continue to feel economic pressure, nearly 40% report putting off purchases experiences and technology.

What purchases have you put off due to either economics or prices?²



Source: Circana, Omnibus Consumer Survey, July 2024

¹Q: How are you feeling about prices? Base: 1005

²Q: What purchases have you put off due to either economics or prices? Base: 1005

A Look Ahead

How 2024 trends will translate to 1H 2025

2024 DRIVERS

Adult market drove gains led by adult fiction

#BookTok and deluxe editions

Kids' market underperformed, non-fiction a bright spot

By age segment, young readers saw highest sales boost

Continued strength in digital audio and ebook formats

1H 2025 EXPECTATIONS

Continued strength: escapism and bibliotherapy

A growing and engaged consumer group hungry for entertaining stories and bookshelf wealth

Return to growth for kids in 2025 with non-fiction outperforming fiction

Improvement across all age segments, series will outperform non-series in older age ranges

Digital formats will continue to gain share led by audiobooks



Content areas to watch

Subjects and genres that are likely to do well in the first half of 2025

01

Adult fiction

- fantasy
- romance
- stories of friendship
- stories of sisterhood & motherhood
- cozy settings
- horror
- dark humor
- magical realism

02

Adult non-fiction

- personal finance
- women's health and wellness
- religion
- themes of community
- logic and brain teasers
- history
- adult coloring & crafting
- themes of nature

03

Kids' market

- licensed books across formats
- themes of nature
- educational materials & readers
- healthy digital habits
- mythical and dark creatures
- Christian topics & Bible studies
- historical fiction (middle grade)
- dark fantasy (middle grade)



Key takeaways for Independent Booksellers

- 01 Books a bright spot in general merchandise
- 02 Digital shift is expanding the overall market, but print will remain the primary format and show strength
- 03 Consumers are looking for escape, hope, and community connection
- 04 Build a strategy that works for you



Thank you



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Circana insights sent
straight to your inbox?

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