BookScan Total Consumer Market (TCM) 2021 Summary

Print books defy lockdown and supply chain to post another year of growth.

Before embarking on any review of 2021, we should first re-establish how remarkable the sales patterns were in 2020, with multiple lockdown surges building upon an already healthy print book market. COVID year two surely brought questions of whether 2021 could measure up, especially given how quickly many interests, habits and fads have come and gone during the pandemic. But books do seem to have escaped the pandemic fatigue: people are still buying, still reading, still looking for comfort and distraction. Certain parts of the year may have fallen short of 2020, not something to read too much into due to how out of the ordinary both years were, but in all, the UK print book market posted another year of growth, across both volume and value.

As with 2020, we've filled in the lockdown gaps with data from our Books & Consumers survey, leading to an estimate of **212.6m** print books bought in 2021 (+5% on 2020 and the highest volume sales since 2011) with **£1.82bn** spent on those books, +3% on 2020 and the first year on record to surpass £1.8bn. Based on the available 42 weeks of BookScan data vs. the same weeks in 2019, both **Fiction** and **Non-Fiction** hit ten-year value highs and **Children's** set a new lifetime record. The following pages explore what drove those record sales, with comparisons to 2019 or 2020 where possible but focussing more on a broader look at what was selling and what trends have continued from recent years, not always with a year-on-year figure attached (as those figures do often come with caveats!).

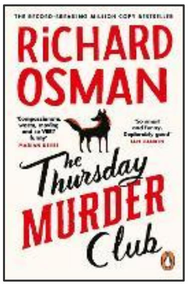
And here we go, 2021 in summary!

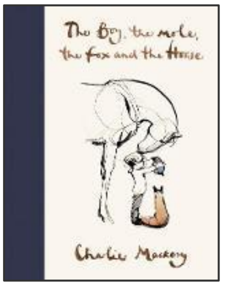
Top Titles

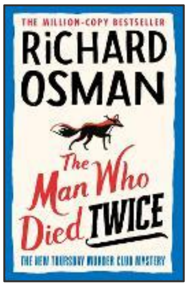
Similar to its predecessor, *Pinch of Nom Quick & Easy* by Kay Featherstone & Kate Allinson began the year at the top of the chart and remained the 2021 bestseller until the start of October, when the paperback of *The Thursday Murder Club* by Richard Osman took over, going on to claim the full-year top spot. In all, Osman racked up the most overall weekly number ones throughout the year, with eight for his debut and a further four for follow-up *The Man Who Died Twice*, which managed to reach fourth in the 2021 chart thanks to another strong Christmas showing for Osman. The *Pinch of Nom* team reigned over the weekly chart eight times, at the start of the year with *Quick & Easy* and at the end of the year with *Comfort Food*, which made the annual top 20 after only four weeks of sales. While his books are absent from the top five for the first time since 2013, David Walliams also amassed eight weeks in the pole position, five for *Megamonster* (the overall **Children's** bestseller for the year) and three for *Gangsta Granny Strikes Again!*.

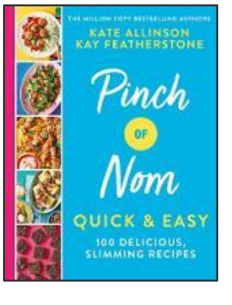
2020's bestseller *The Boy, The Mole, The Fox and The Horse* by Charlie Mackesy continued to be a favourite in 2021, never dropping out of the weekly top 50 and earning it the runner-up spot for the full year (and a top ten spot for the third year running). After debuting at number one, *The Midnight Library* by Matt Haig joined the top five as of mid-March, ending the year at third overall and second in **Fiction**. Along with *The Midnight Library* and *The Thursday Murder Club*, paperbacks had a good year at the top of the chart, with eight different books spending a total of 19 weeks as the overall number one, compared to only four weeks in 2020 and seven weeks in 2019. And Osman wasn't the only **Fiction** author with multiple weeks leading the chart, as *Hamnet* by Maggie O'Farrell and *The Sentinel* by Lee Child & Andrew Child both banked three weeks, and then another two weeks for Child & Child with hardback *Better Off Dead*.

Switching to value sales, we swap one Osman book for another, as *The Man Who Died Twice* made the most money in 2021, with *The Boy, The Mole, The Fox and The Horse* still the runner-up and *Pinch of Nom Quick & Easy* moving up to third. Of course value ranks will favour higher priced books: *Windswept & Interesting* by Billy Connolly joins the top five, followed by *And Away…* by Bob Mortimer, and then the most impressive leap, *The Lyrics* by Paul McCartney moving up to seventh by value from 240th by volume.









In total, **Adult Fiction** claims nine spots in the annual top 20, the highest number since 2012, with five of those titles representing repeat series/books from 2020's bestsellers. *Where the Crawdads Sing* by Delia Owens takes a spot for the second year in a row, ranking tenth overall and fourth in **Fiction** thanks to steady sales throughout the year, while *The Sentinel* keeps up the usual *Jack Reacher* presence among the year's bestsellers, at 18th overall. Richard Osman has increased his presence at the top of the chart, with the hardback of *The Thursday Murder Club* staying among the bestsellers after leading **Fiction** in 2020, replaced by the paperback at the top of the 2021 chart and joined by *The Man Who Died Twice* hardback. With both *The Thursday Murder Club* editions present, this marks the first time on record that the hardback and paperback of the same book have both appeared within the annual top 20.

As for the new entries, Marian Keyes nabs her highest position in a decade, with *Grown Ups* at 13th in the **TCM** (one spot ahead of *The Break* back in 2018 and one spot behind *The Brightest Star in the Sky* in 2011). Booker winner *Shuggie Bain* by Douglas Stuart kicked off the year among the hardback bestsellers, leading into the paperback debuting at second in the **TCM** followed by a successful enough run to land it at 19th overall for the year. Not the only prize among the bestsellers, as Women's Prize for Fiction winner *Hamnet* hit number one upon its release and appears at 12th overall and fifth in **Fiction**, with high enough sales to make it Maggie O'Farrell's lifetime bestseller so far. Similarly, **Fiction** runner-up for the year *The Midnight Library* is Matt Haig's most successful book to date.

The Boy, The Mole, The Fox and The Horse tops the **Non-Fiction** chart once again, ahead of another repeat bestseller *Pinch of Nom Quick & Easy*, which ranked 18th in 2020; new release *Comfort Food* improved on that to reach 17th overall. *Guinness World Records 2022* marks the annual's highest position since 2017, at third in **Non-Fiction** and sixth in the **TCM**. While **Non-Fiction** titles claim fewer spots in the 2021 top 20 than in the previous year, more **Autobiographies** make the chart, from Bob Mortimer, Billy Connolly and Dave Grohl, the last of which hit the overall weekly top spot upon release.

The bestsellers don't have quite the variety that we've seen in recent years for **Non-Fiction**, with only four different product classes represented, thanks to the doubling up of *Pinch of Nom* and all of the memoirs coming from the **Arts** subcategory. If we extend a bit beyond those top 20, a few more categories come up, with *Tap to Tidy*, *Jane's Patisserie* and *Good Vibes, Good Life* featuring at the top of their respective product classes, but even with the different types of books, a pattern of celeb author status (whether more traditional celebrity or newer social media personalities) certainly ties together the top of the **Non-Fiction** chart.

Even with only three authors represented by the **Children's** titles within the overall top 20, that's more variety than 2020 gave us, when David Walliams was the only name in there, with the top three **Children's** books. Walliams dropped down to two of the **Children's** bestsellers for 2021, with *The Christmas Pig* by J.K. Rowling separating the two. TikTok favourite *They Both Die at the End* by Adam Silvera just made it into the top 20 as of the final week of the year, the first YA title to do so since 2015. Special mention goes to *You Are a Champion* by Marcus Rashford & Carl Anka, which was inched out of the bestsellers post-Christmas but did end at 21st overall and 5th in **Children's**.

TCM Top 20 Titles 2021

Pos	Title	Author	Publisher	RRP	Binding	Product Class
1	The Thursday Murder Club	Richard Osman	Penguin	£8.99	P	Crime, Thriller & Adventure
2	The Boy, The Mole, The Fox & The Horse	Charlie Mackesy	Ebury	£16.99	H	History of Ideas & Popular Philosophy
3	The Midnight Library	Matt Haig	Canongate	£8.99	P	General & Literary Fiction
4	The Man Who Died Twice	Richard Osman	Penguin	£18.99	H	Crime, Thriller & Adventure
5	Pinch of Nom Quick & Easy	Kay Featherstone & Kate Allinson	Pan Macmillan	£20.00	H	Health, Dieting & Wholefood Cookery
6	Guinness World Records 2022		Guinness World Records	£20.00	H	Dictionaries & Reference
7	And Away...	Bob Mortimer	Simon & Schuster	£20.00	H	Autobiography: The Arts
8	Megamonster	David Walliams	HarperCollins	£14.99	H	Children’s Fiction
9	Windswept & Interesting	Billy Connolly	John Murray Press	£25.00	H	Autobiography: The Arts
10	Where the Crawdads Sing	Delia Owens	Little, Brown	£8.99	P	General & Literary Fiction
11	The Christmas Pig	J.K. Rowling	Hachette Children’s	£20.00	H	Children’s Fiction
12	Hamnet	Maggie O’Farrell	Headline	£8.99	P	Historical & Mythological Fiction
13	Grown Ups	Marian Keyes	Penguin	£8.99	P	General & Literary Fiction
14	Gangsta Granny Strikes Again!	David Walliams	HarperCollins	£14.99	H	Children’s Fiction
15	The Thursday Murder Club	Richard Osman	Penguin	£14.99	H	Crime, Thriller & Adventure
16	The Storyteller	Dave Grohl	Simon & Schuster	£20.00	H	Autobiography: The Arts
17	Pinch of Nom Comfort Food	Kay Featherstone & Kate Allinson	Pan Macmillan	£20.00	H	Health, Dieting & Wholefood Cookery
18	The Sentinel (Jack Reacher 25)	Lee Child & Andrew Child	Transworld	£8.99	P	Crime, Thriller & Adventure
19	Shuggie Bain	Douglas Stuart	Pan Macmillan	£8.99	P	General & Literary Fiction
20	They Both Die at the End	Adam Silvera	Simon & Schuster	£7.99	P	Young Adult Fiction

Top Authors

Julia Donaldson was once again the bestselling author in the UK in 2021, with her new *Tales from Acorn Wood* book *Cat's Cookbook* leading the **Pre-School & Picture Books** chart for the year, joined within the category's top ten by six more of her collaborations with Axel Scheffler. The only new entry to the top ten was Rod Campbell, shifting up from 11th in 2020. The top four **Children's** authors stayed the same as the previous year, now followed by Tom Fletcher, who jumped up to fifth and also earned a spot within the overall **TCM** top ten for the year. **Children's** authors dominate within the overall ranks, even gaining a spot away from **Non-Fiction** since 2020.

That leaves Kay Featherstone & Kate Allinson, once again at the top of their sector, as the only strictly **Non-Fiction** authors within the **TCM** top ten. Charlie Mackesy held onto his spot at second in **Non-Fiction**, with Jamie Oliver, Rukmini Iyer and Mary Berry also making repeat appearances in the top ten. The remaining half are new entries, three of which had books within the bestsellers as already covered (Billy Connolly, Bob Mortimer and Dave Grohl). The combination of the strong performance for Vex King's first book with his 2021 release was enough to boost him into the top ten from 29th, while Amanda Owen leapt up thanks to two new books combined with her backlist.

Fiction saw its own share of jumps, most significantly Matt Haig moving up from 62nd to fourth and also earning a spot in the overall top ten with the combination of his **Fiction**, **Non-Fiction** and **Children's** sales. John Grisham, Peter James and Stephen King all moved up from just outside the sector's top names in 2020, while Lisa Jewell went from tenth to fifth. And with three spots in the bestsellers for the year, Richard Osman shifted into first in **Fiction**, ahead of James Patterson and Lee/Andrew Child.

Fiction		Non-Fiction		Children's	
by volume sales, TCM top ten in bold, 2020 sector rank in parentheses					
Bestselling authors	Top title	Bestselling authors	Top title	Bestselling authors	Top title
Richard Osman (3)	The Thursday Murder Club	**Kay Featherstone & Kate Allinson (1)**	Pinch of Nom Quick & Easy	**Julia Donaldson (1)**	Cat's Cookbook
James Patterson & co-writes (1)	20th Victim	Charlie Mackesy (2)	The Boy, The Mole, The Fox and The Horse	**David Walliams (2)**	Megamonster
Lee/Andrew Child (2)	The Sentinel	Billy Connolly (30)	Windswept & Interesting	**J.K. Rowling (3)**	The Christmas Pig
Matt Haig (62)	The Midnight Library	Bob Mortimer (-)	And Away...	**Fiona Watt (4)**	That's not my dinosaur...
Lisa Jewell (10)	Invisible Girl	Jamie Oliver (4)	Together	**Tom Fletcher (9)**	The Christmasaurus and the Naughty List
Dilly Court (6)	The Reluctant Heiress	Vex King (29)	Good Vibes, Good Life	**Jeff Kinney (5)**	Big Shot
Danielle Steel (4)	The Numbers Game	Dave Grohl (-)	The Storyteller	Dav Pilkey (6)	Mothering Heights
John Grisham (15)	A Time for Mercy	Rukmini Iyer (10)	The Green Roasting Tin	Roald Dahl (7)	Charlie and the Chocolate Factory
Peter James (14)	Left You Dead	Mary Berry (8)	Love to Cook	Liz Pichon (8)	Ten Tremendous Tales
Stephen King (11)	If It Bleeds	Amanda Owen (36)	Celebrating the Seasons with the Yorkshire Shepherdess	Rod Campbell (11)	Dear Zoo

Genre Trends

Fiction

Following on from the strong performance of **Fiction** in 2020, we once again saw widespread success for the sector throughout 2021. Of the available 42 weeks, 26 increased by more than £1m against the same weeks in 2019, and eight of the 26 weeks available to compare to 2020 did the same. Both volume and value sales grew 20% compared to 2019, with a more moderate 5% value and 3% volume increase vs. available 2020 data. Based on the 42-week span, **Fiction** volume sales reached 48m, with value sales hitting their highest point since 2010, at £362m, which actually surpasses full-year sales from 2013 to 2019 even without the first ten weeks of the year.

Only two categories fell short of 2019, with **Short Stories & Fiction Anthologies** and **Horror & Ghost Stories** declining by 1% and 2% respectively by value, although the former did improve on its 2020 sales. The four largest categories – **General & Literary Fiction**; **Crime, Thriller & Adventure**; **Science Fiction & Fantasy** and **Romance & Sagas** – achieved double-digit percent growth across both measures, with the next category in the list, **Historical & Mythological Fiction**, seeing more moderate growth rates (+6% value on 2019) but still enough of an increase to set a new lifetime high. However, 2021 has to settle for second-best when it comes to **Romance & Sagas**: pandemic escapism wasn't enough to supplant the 2012 summer of *Fifty Shades*.

The largest increase in actual sales came from **Crime, Thriller & Adventure**, with 2.6m more books bought, adding up to an additional £16m compared to 2019 for total sales of 16m and £106m, but it was **Graphic Novels: Manga** with the largest percent increase, more than doubling since 2019. In fact, all of the **Graphic Novels** subcategories had impressive years: even with incomplete data against full years, both **Manga** and **Non-Fiction & Literary** had their highest year on record, **General** its fifth-highest and **Superheroes** its third, collectively giving **Graphic Novels** overall a lifetime peak.

Trade Non-Fiction

While **Fiction** largely kept apace with 2020, **Non-Fiction** seemed to struggle more throughout the year, but echoing back to the beginning, this reflects more on how extraordinary 2020 was, not necessarily on a waning interest in **Non-Fiction**. Excluding 2020 from the picture, **Trade Non-Fiction** value was only short of 2006 and 2007 when comparing the 42-week span, and at £663m, was actually ahead of full-year sales from 2012 to 2015. Volume sales for the 42 weeks tracked a little behind 2019, but only by 0.3% to 60m, compared to value growth of 3%. Only two sectors saw significant decline, with **Atlases, Maps & Travel** understandably still down on pre-pandemic levels (but one of the few areas to grow compared to 2020) and **Fiction Related Items** also posting double-digit percent decline for both measures. Four additional areas saw more moderate decline (by less than 3% in value): **Family, Health & Relationships**; **Literature, Poetry & Criticism**; **Politics & Government** and **Dictionaries & Reference**, with **Humour, Trivia & Puzzles** also dropping in value despite more books bought.

That's balanced by three areas experiencing double-digit percent growth for both volume and value: **Mind, Body & Spirit** (with the largest percent increase) and **Personal Development** both hit new lifetime highs, and **Leisure & Lifestyle** sales ranked only behind 2015, the peak year of adult colouring. **The Arts**, **Food & Drink**, **Religion** and **The World/Ideas/Culture** also reached their highest value on record when comparing the like-for-like 42 weeks, although **The Arts** and **Religion** did fall behind 2019 in volume terms. **Biographies & Autobiographies** similarly saw value growth despite volume decline against 2019, although volume sales were still ahead of 2012 to 2018, with value at its highest point since 2008. **Autobiography: The Arts** reclaimed its place as the largest **Autobiographies** subcategory, after **General** led for the past five years, and at £38m spent across 42 weeks, 2021 ranks ahead of full-year sales for every year apart from 2006, 2008 and 2010. For all of **Non-Fiction**, **Food & Drink: General** reigned as the largest individual category, at £46m, accounting for more than half of the **Food & Drink** sector for the first time since 2017 and driving the cookery growth, as the other categories fell short of 2019 (apart from **Other Beverages**, apparently lots of tea and cocktails got everyone through 2021). The remaining subject areas (**History & Military**, **Sport** and **Transport**) all grew in volume and value, with particularly strong increases for **Regional History** and **General Sport & Fitness Training**.

Four individual product classes more than doubled in volume sales compared to 2019: **Psychic Powers & Parapsychology**, **Biography: Royalty** (both of which doubled in value as well), **Astrology & Fortune-telling** and **Law, Citizenship & Rights**. Overall, half of the **Trade Non-Fiction** categories experienced growth across both measures, with the already mentioned **Autobiography: The Arts** and **Food & Drink: General** seeing the largest actual sales increases of £18m and £14m respectively, followed by **Self-Improvement: General** (+£5m); **Handicrafts, Arts & Crafts** (+£4m) and **Natural History: General** (+£3m).

Specialist Non-Fiction

Specialist Non-Fiction didn't see as much success as **Trade** in 2021, with overall sales tracking behind 2019 for the available weeks, although only by 1% in value to £122m and 2% volume to 6.7m (but a more significant 7% and 6% decline against 2020). A few subject areas resisted that decline, including **Social Sciences**, which took over from **Management, Business, Economics & Industry** as the largest area of **Specialist Non-Fiction**. Despite overall decline for **Business** books, the largest category of **Management & Business: General** did increase compared to 2019, along with **Finance & Accounting**. **Medicine** and **Philosophy & Psychology** stayed ahead of 2019, as they did in 2020, now joined by **Geography, Environment & Agriculture** in growth. A big reason for the growth in **Social Sciences** was **Education & Teaching** increasing by more than £1m, along with **Gender Studies/Gay & Lesbian Studies** more than doubling in value and strong growth for **Sociology & Anthropology**, while **Medical Nursing & Ancillary Services** and **Psychiatry & Clinical Psychology** drove the **Medicine** growth and both **Psychology** and **Philosophy** grew.

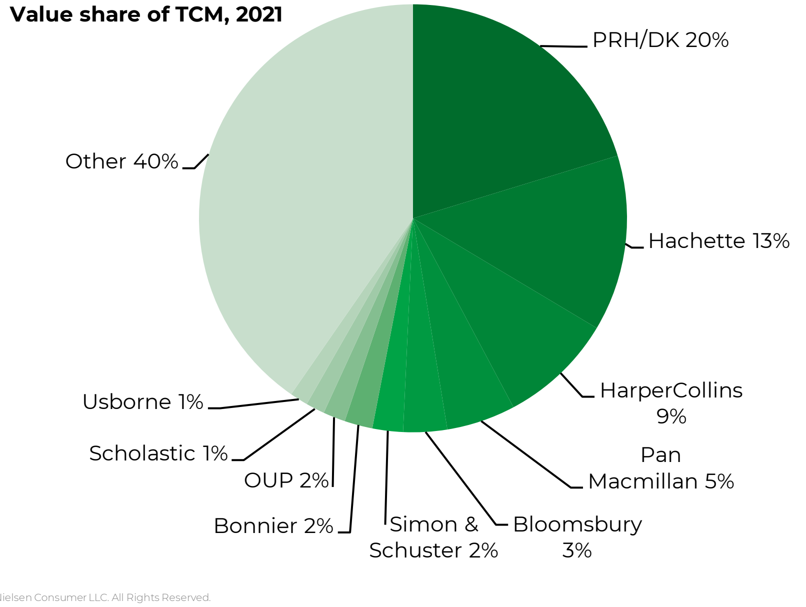
Children's, Young Adult & Educational

As mentioned at the start, the **Children's, Young Adult & Educational** sector hit record heights in 2021, with 60m books adding up to £372m in the available 42 weeks, nearly £50m ahead of the 2019 equivalent. If we compare the 42 weeks of 2021 to previous full years, **Children's** value sales rank only behind 2016 to 2019, trailing the peak 2019 by £15m. The only areas to significantly decline in 2021 were educational categories, with **Reference & Home Learning**, **Children's Dictionaries** and **School Textbooks & Study Guides** (apart from **Vocational)** all down across both measures. Additionally, volume sales of **Children's Maps & Atlases**, **Children's Annuals** and **Children's Fiction** fell short but all three did manage to increase in value. **Children's Fiction** actually saw one of its highest-earning years, despite fewer books being bought.

And joining them with value growth is everything else! A number of categories achieved their highest year yet: **Novelty & Activity Books**, **Picture Books**, **Children's Comic Strip Fiction & Graphic Novels**, **Children's General Non-Fiction** and **Young Adult General Interest & Leisure** saw more money spent in the 42 weeks of 2021 than any full year on record. While not quite at that impressive level, **Pre-School & Early Learning** and **Children's General Interest & Leisure** surpassed 2019 on the 42-week like-for-like basis, with **General Interest & Leisure** second only to 2014 (the *Minecraft* year), and **Young Adult Fiction** exceeded full-year sales from both 2018 and 2019.

For the 26 weeks that we can compare to 2020, **Children's** books did track slightly behind, only by 0.1% in volume and 1% value, but many of the high-performing categories defied that, with double-digit percent growth for value sales of **Novelty & Activity**, **YA Fiction**, **Comic Strip Fiction & Graphic Novels**, **Annuals** and **YA General Interest & Leisure**.

Top Publisher Performance



The top ten publishers remained the same in 2021 as in 2020, with just a couple of shifts in the rankings: Simon & Schuster jumped ahead of both Bonnier and OUP after gaining 0.5% of the market, and Bonnier moved back ahead of OUP after the reverse happened in 2020. Collectively the top publishers lost 1% of **TCM** value since 2020, with those beyond the top ten accounting for 40% of sales.

In Summary

A lot grew in 2021. Just like a lot grew in 2020. But digging through all those categories, we can certainly identify various themes, some of which continue trends from the before times and others brought to the fore since 2020. Books related to self-help and positive development for both children and adults keep reaching new peaks, while books that aid in understanding the world around us, whether the natural world or human society, reverberate across many different corners of the market. At-home activities continue to be important, which fortunately includes leisure reading, as evidenced by the strong performance of **Fiction** and **YA Fiction**. Overall, the year's bestsellers show book buyers seeking out comfort, laughter, escapism, familiarity and maybe a sense of community, given the continued impact of social media in bringing in new authors with existing platforms and creating conversations around new and old books.

The start of 2022 is unfortunately looking a lot like 2021, with a new variant, a rush to vaccinate and widespread uncertainty. But one thing we can be certain about: books are most definitely not a pandemic fad and have proved their lasting power time and again. The past two years have highlighted the versatility and adaptability of books themselves as well as consumers' methods of finding, accessing and buying books, whether by switching to digital formats, clicking and collecting at local bookshops, finding recommendations online or attending virtual festivals and events, all without replacing (when legally allowed) good old-fashioned bookstore browsing or chatting with a friend about a great book.

While particularly the first lockdown in 2020 highlighted how digital can step up when physical isn't so accessible, 2021 was all about the collaboration of virtual and irl, and I think what we've seen with BookTok gives a good example of this: readers post videos about all kinds of books they love, then followers buy those books, then bookstores feature those books, then more people buy those books, then more people talk about those books both on- and offline (as I have personally experienced: just before Christmas, my aunt asked if I had read *Evelyn Hugo*). But really, what a wonderful thing, that for plenty of people the best use of the latest technology is to talk about a traditional form of entertainment that has held onto its physical importance for so long, against the odds – and really its importance in general, as we know the book's the thing, whether it be print, e-book or audiobook.

TCM ten-year trend, value