



A RESEARCH REPORT BY BOOKNET CANADA

BNC RESEARCH

1.2020

Sales Trends in Children's Publishing



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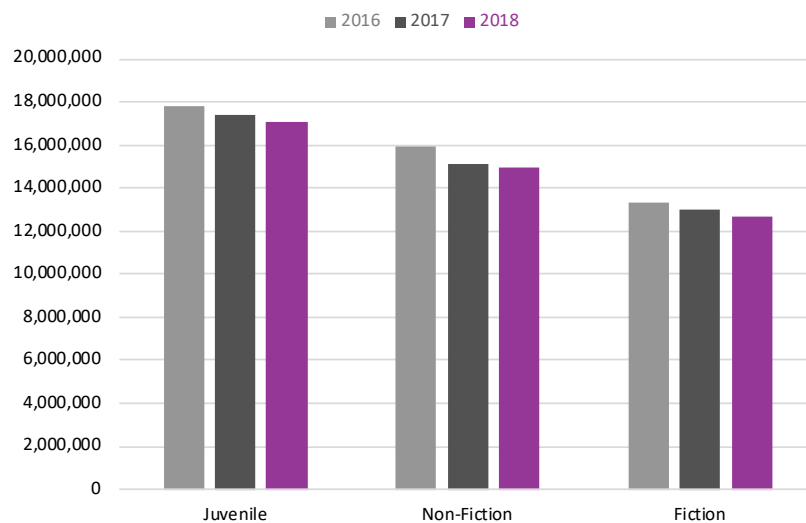
Introduction

When we think of big-selling books, the names that might first jump out at us are Margaret Atwood, John Grisham, or some other bestselling Fiction author; the world of Juvenile literature may be overlooked. Would you be surprised to know that the Juvenile category has the highest market share when compared to Fiction and Non-Fiction books? Randomly looking at the current week of print bestsellers, as of this writing and as reported by BNC SalesData, four of the top 10 titles are Juvenile. Juvenile titles now regularly outsell the adult Fiction and Non-Fiction categories.

This study is an exploration of Juvenile print books in Canada, digging into sales trends, subject, and format performance. We also take some time to explore certain subgenres, such as the performance of picture books and newer trends like 5-Minute Stories. Data is limited to titles that are designated as Juvenile based on publisher metadata and does not include Young Adult titles.

The sales panel we use for our research represents approximately 85% of the trade market in Canada. As we add to this panel of reporting retailers each year, we have identified a subset of comparable stores that are used for year-over-year analysis. This comparable store panel is geographically representative and includes the majority of stores selling books across Canada in addition to being a group of stores that have consistently reported data, which means we will not see any artificial sales increases due to growth in the panel size.

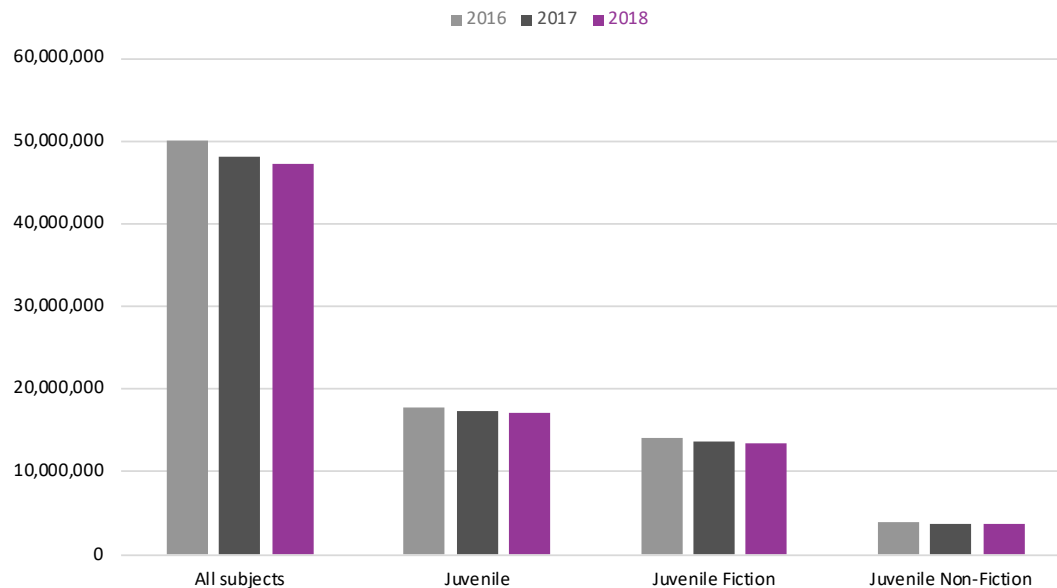
Annual Juvenile Market Share – Comparable Stores



Overall Performance

It is likely no surprise that over the last three years there has been a moderate decline in the Canadian print book market. Similarly, the Juvenile market has seen a slight decline of -2.3% from 2016 to 2017 and a slightly smaller decline of -1.8% from 2017 to 2018. Between 2017 and 2018, there was a -1.8% decline in Juvenile Fiction and -1.7% in Juvenile Non-Fiction.

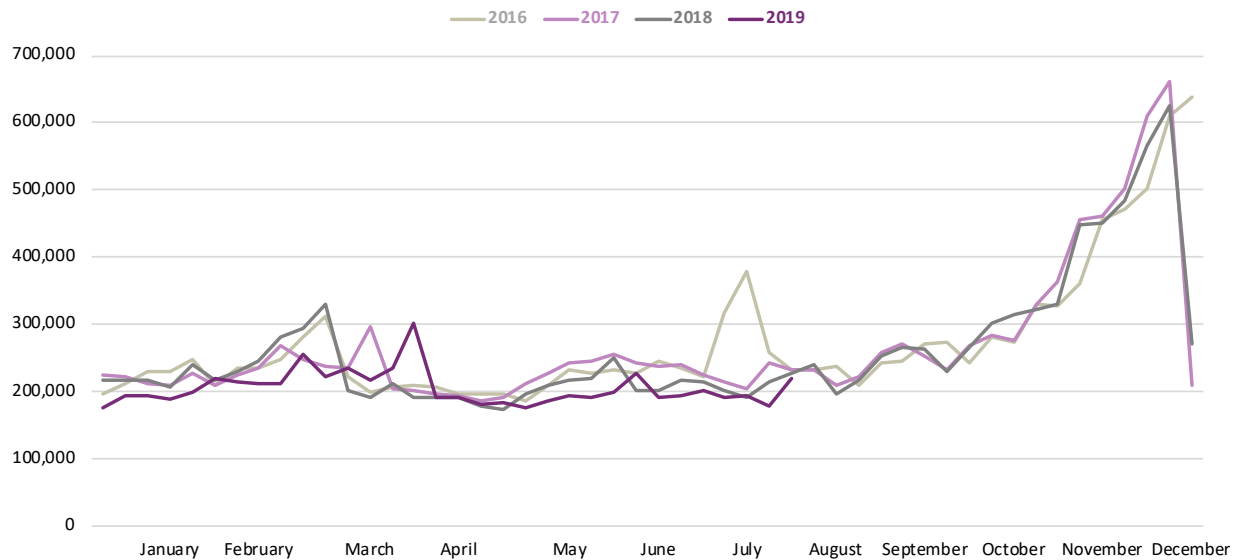
Annual Sales Performance – Comparable Stores



Even with a slight sales decline, the Juvenile category continues to sell strong and represent a large portion of print book sales in Canada, claiming just over 36% of all Canadian print sales for 2018. This market share is flat from 2017 and up slightly from 2016. The majority of Juvenile sales are Fiction (78.5%) with 21.5% for Juvenile Non-Fiction. As you can see from the graph above, while the Juvenile Fiction category has seen a bit of decline between 2016 and 2018, Juvenile Non-Fiction has remained fairly flat.

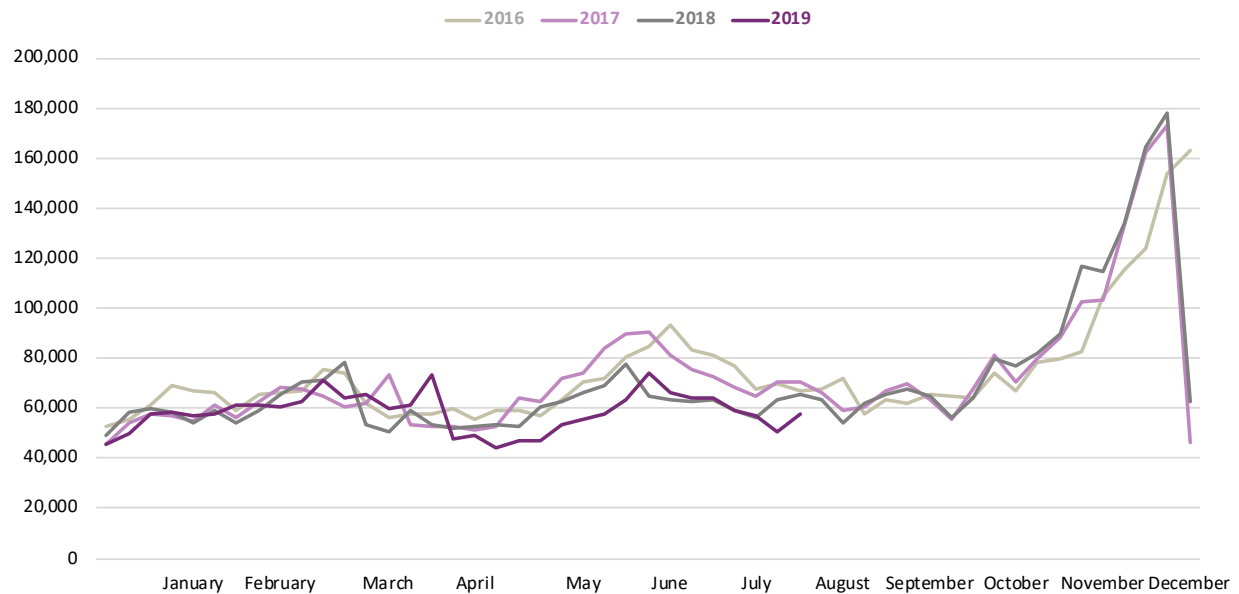
Looking at sales trends for Juvenile Fiction throughout the year, we find, unsurprisingly, a large sales spike in November and December but we also see a very notable spike in March, likely when kids are out of school for March break. Summer also sees a longer and more drawn-out sales increase although this appears to have declined slightly in 2019.

Monthly Sales Performance – Juvenile Fiction – Comparable Stores



Overall, Juvenile Non-Fiction has considerably lower sales than Fiction. One of the notable differences in sales trends between Juvenile Fiction and Non-Fiction is the fact that March sales are slightly more proportionally notable for Fiction whereas Non-Fiction tends to increase more in the summer months.

Monthly Sales Performance – Juvenile Non-Fiction – Comparable Stores



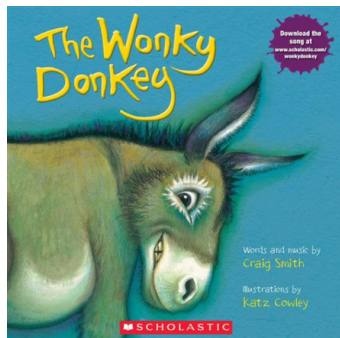
Genre Performance – Juvenile Fiction

Which are the biggest selling genres in Juvenile Fiction? Ranked in order of units sold in 2018, these nine genres have been among the top 10 for the past three years:

1. Humorous Stories
2. Animals
3. Media Tie-In
4. Comics & Graphic Novels
5. General
6. Action & Adventure
7. Social Themes
8. Fantasy & Magic
9. Readers

Top Genre Spotlight: Humorous Stories

Humorous Stories is part of the Juvenile Fiction BISAC category. In this genre, the top-selling books contain a lot of names you would expect to see; Jeff Kinney, Dav Pilkey, and Robert Munsch are all in the top 10.



One standout is *The Wonky Donkey*, the 2010 breakout title by Craig Smith and Katz Cowley. It was the top-selling title in this category for 2018 and fell to second place in 2019.

Made famous by a [viral video of a Scottish grandmother reading to her grandson](#), book sales for *The Wonky Donkey* soared along with the millions of views.

Which books topped the Humorous Stories list in 2019? There is a span of ages represented, from the board book *Moo, Baa, La La La!* to the middle grade Jeff Kinney book *The Meltdown*. Dav Pilkey is the big winner with two books in the top 10, both part of the Captain Underpants series.

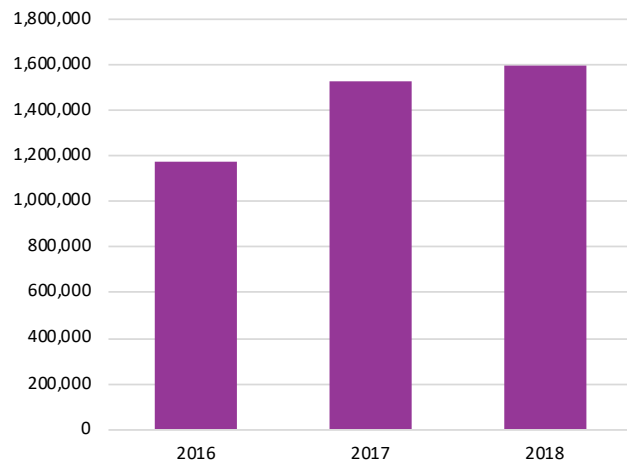
When it comes to publication date, half of the books were published in 2019. Four of the top 10 titles are deeper backlist being published prior to 2018, including *The Wonky Donkey* from 2010 and *Moo, Baa, La La La!* from 1982.

When it comes to Canadian titles, Robert Munsch is the only Canadian to make the top 10 for 2019 with *Pyjama Day* in the 10th spot.

Sales Trends

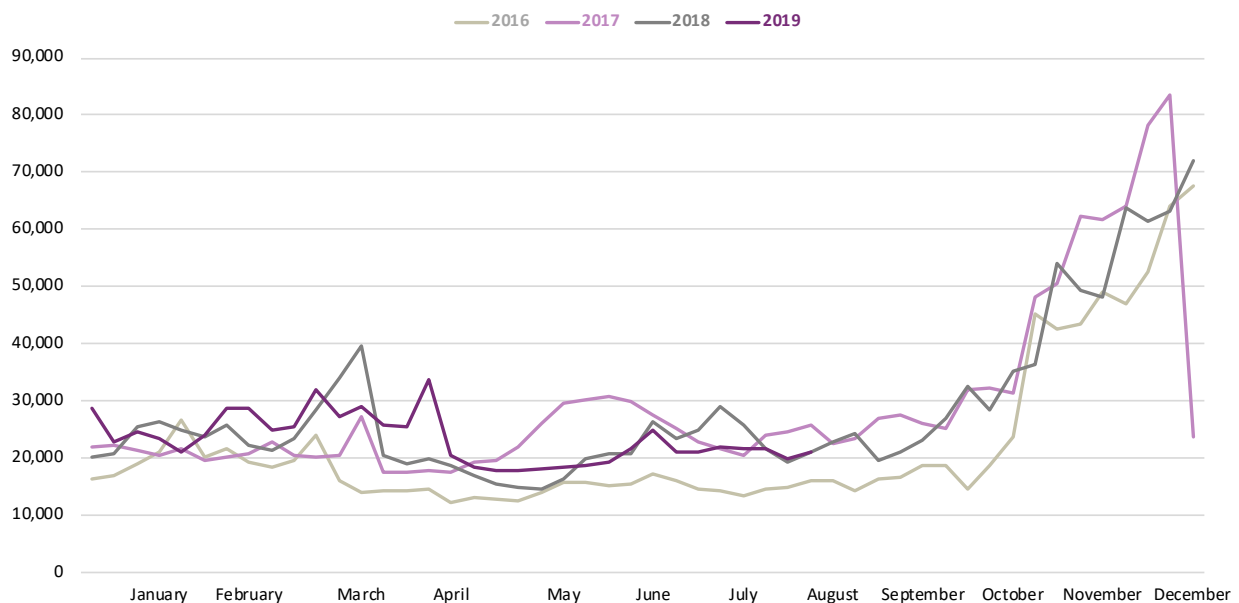
Again, looking at a subset of comparable stores, the Humorous Stories genre is notably trending up over the past three years. From 2017 to 2018 there was a 4.4% increase in sales, which follows a bigger jump of 23.2% between 2016 and 2017.

Annual Sales Performance – Humorous Stories – Comparable Stores



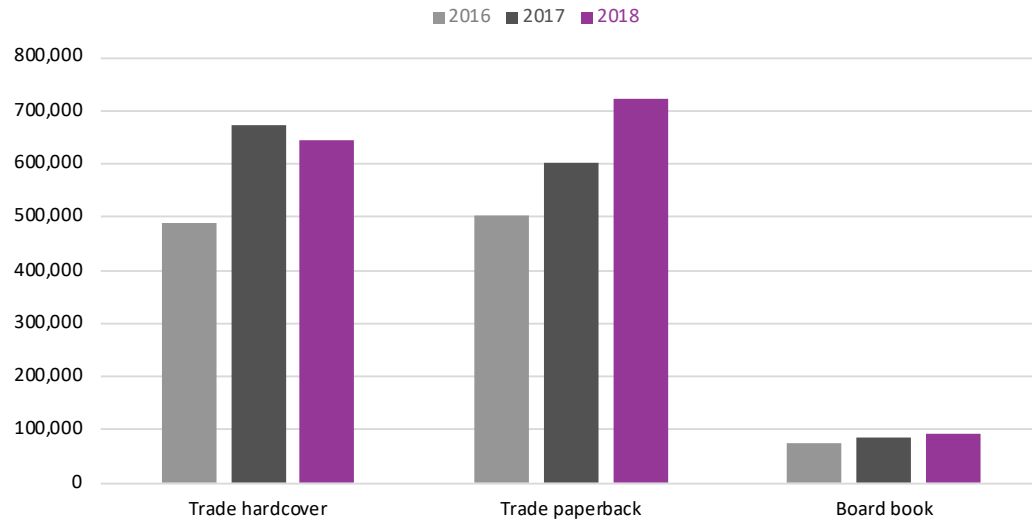
When we look at the genre's month-by-month sales performance, we find that sales are relatively flat throughout the bulk of the year with some small spikes in March, perhaps due to March break, a bit of an increase in the summer, and the largest spike happening over the holiday season.

Monthly Sales Performance – Humorous Stories – Comparable Stores



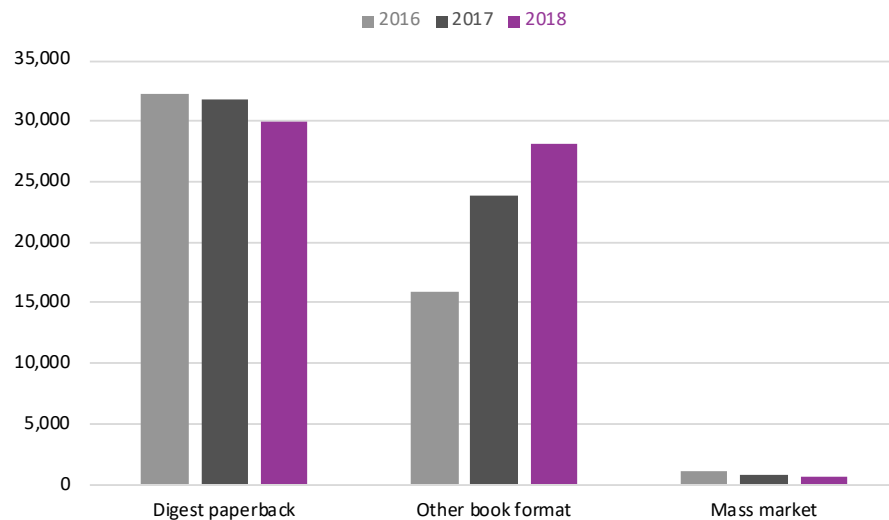
Both trade hardcover and trade paperback sales have seen notable increases over the past three years, with board books seeing a slight upwards trend.

Annual Format Performance – Humorous Stories – Comparable Stores



When we drill down into a few additional formats, we find some interesting data. The “other book format” category is seeing large growth. Looking at the title data in more depth, the top-selling books in this format contain titles such as wipe-clean books and the Brain Quest deck series. We also find quite a number of products that may or may not be legitimately considered an other book format.

Annual Format Performance – Humorous Stories – Comparable Stores



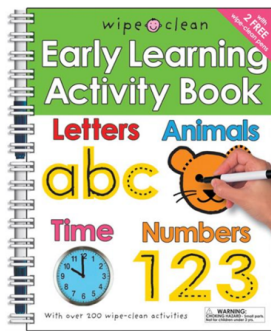
Publisher Challenge – Do an analysis of format data in your ONIX files. In particular, take a look at titles that are categorized as “Other book format”.

Genre Performance – Juvenile Non-Fiction

In Juvenile Non-Fiction, looking at 2016 to 2018, the consistently top-selling categories are:

1. Activity Books
2. Animals
3. Science & Nature
4. Concepts
5. Games & Activities
6. Readers

Top Genre Spotlight: Activity Books



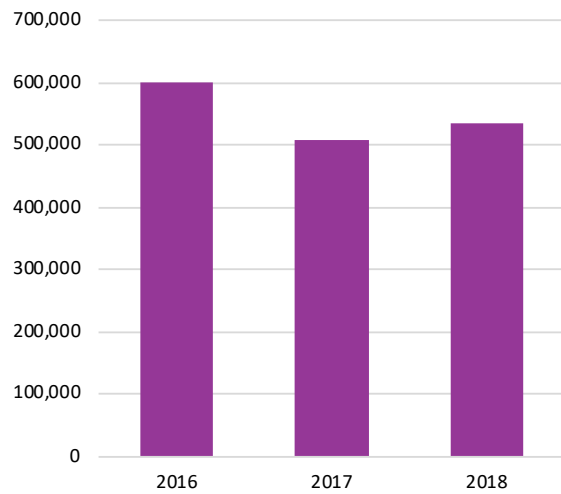
In the Activity Book genre, the top sellers are sticker books, stencilling, and nail art. Another type of book that appears a number of times at the top, for both 2018 and 2019, are the pre-kindergarten “wipe-clean” books.

The category is very backlist heavy with only two of the top 10 books for 2019 being published in 2019. Seven of the titles were published before 2018 with one title dating back to 2008.

Sales Trends

The Activity Books genre has seen some fluctuation over the past three years. In 2016, it saw some increase due to a handful of LEGO® titles that topped the list that year. While the LEGO® activity books continue to sell well, we are not seeing the same volume experienced in 2016.

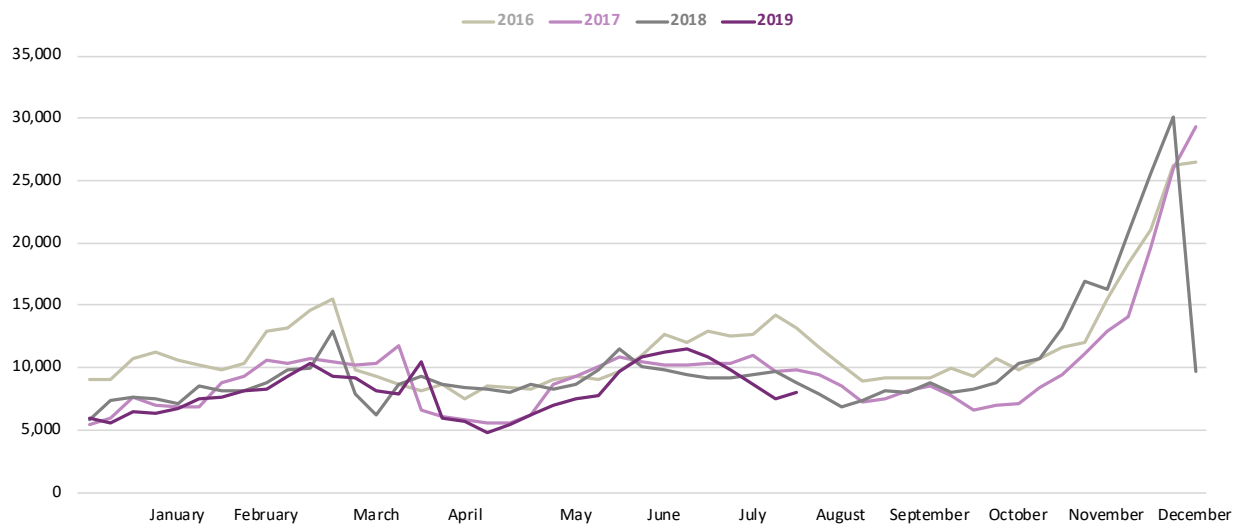
Annual Sales Performance – Activity Books – Comparable Stores



Looking at the genre’s monthly sales performance, we find a notable sales increase in March, perhaps fueled by the need to keep kids occupied over the March break. Summer sees a bit of an increase with holiday sales being concentrated in late November to December.

Looking at 2019 sales to date of writing, we see a decrease in overall sales, particularly during March where we saw higher increases in previous years. For the 2018 data, the drop in December is due to the way the weeks are aligning; the spike is Christmas and drop is the period after.

Monthly Sales Performance – Activity Books – Comparable Stores



Growing Genres

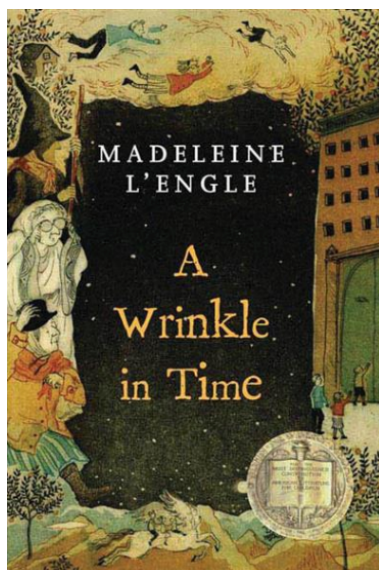
While the genres examined above represent the biggest sellers, we wanted to identify any genres that have been seeing growth.

Single titles or a group of small titles can fundamentally impact the sales performance of a genre in a given year so, when looking at year-over-year data, it is common to see a year of growth followed by decline while the category normalizes back to the original level of sales (i.e., breakout titles inflate the category and then it comes back to normal sales levels).

The following genres have seen year-over-year growth when comparing percent change for 2017 and 2018. Percent change represents the degree of change over time. For Science Fiction, there was a growth of 60.3% from 2016 to 2017 and another growth of 15% from 2017 to 2018. Analysis has been limited to the larger genres since, as noted above, the sale of a small set of titles can appear as a large jump in growth for smaller genres.

Juvenile Fiction Genres – Percent Changes

	2017	2018
Science Fiction	60.3%	15.0%
Imagination & Play	18.6%	18.3%
Comics & Graphic		
Novels	6.6%	16.0%
Social Themes	7.6%	14.2%
Bedtime & Dreams	14.0%	11.4%



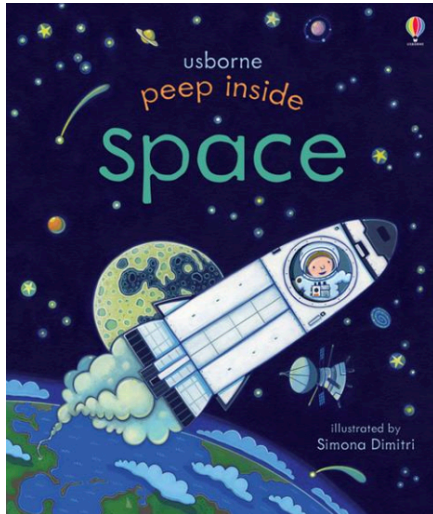
A Wrinkle in Time topped the Science Fiction genre in 2017 and 2018, with the movie tie-in version joining the list in 2018. In 2019, Kenneth Oppel's *Inkling* took the top spot.

The Imagination & Play genre has a much wider variety of books. Titles that top the list vary from books for middle grade readers, such as R.J. Palacio's *We're All Wonders*, to picture books for younger readers, such as Oliver Jeffer's *How to Catch a Star* and titles from Disney Princess and Sesame Street.

Social Themes has subgenres that span topics such as New Experience, Friendship, and Emotions & Feelings, which results in a varied list for a wide variety of ages. Top titles include *Oh, the Places You'll Go*, Gordon Korman's *Restart*, and Nick Bland's picture book *The Very Cranky Bear*.

Juvenile Non-Fiction Genres – Percent Changes

	2017	2018
Technology	29.0%	45.4%
Science & Nature	13.3%	44.4%
Biography & Autobiography	43.4%	27.1%
Study Aids	142.6%	24.6%
Social Topics	12.9%	21.2%



Topping the Juvenile Non-Fiction category for 2018 was the Technology genre, where the top-selling titles tend to be books for younger readers such as *Peep Inside Space* and National Geographic's *How Things Work: Inside Out*.

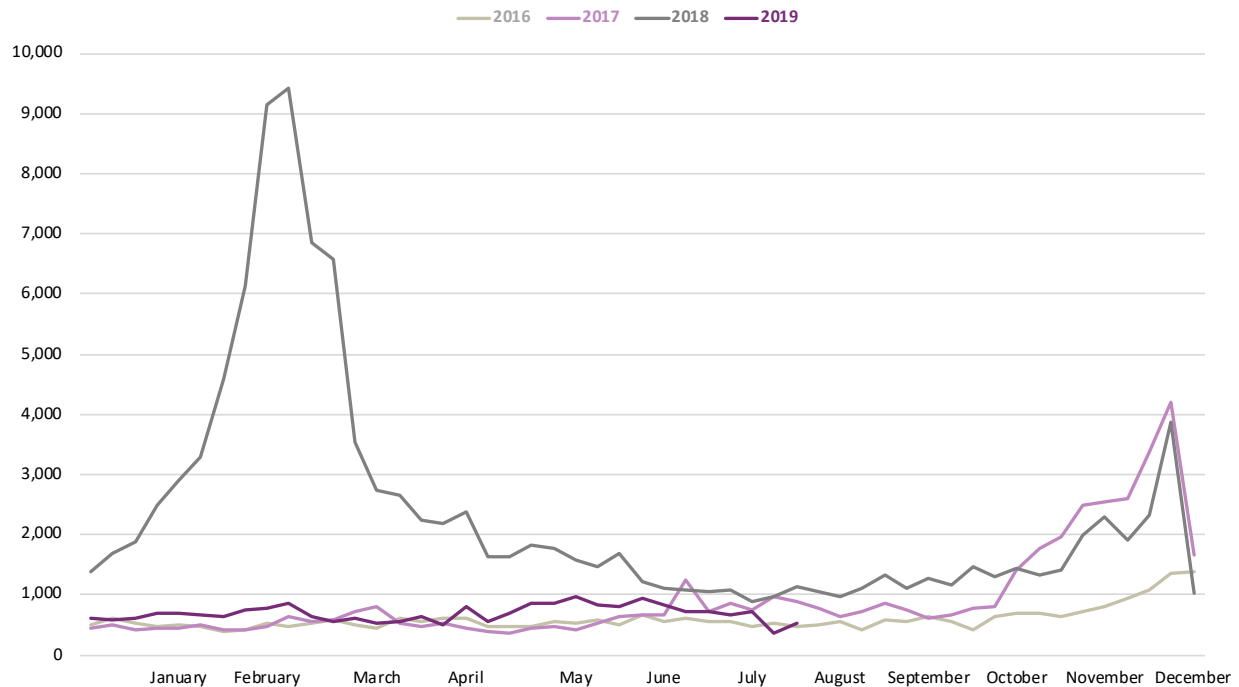
Science & Nature also saw a notable jump in sales for 2018, topped by National Geographic's *Why?: 1,111 Answers for Everything*. Again, many of the top-selling titles are for younger readers focusing on animals and how things work.

Biography & Autobiography has top-sellers that appeal to a wider age group with titles such as *Malala's Magic Pencil* and Elena Favilli's *Good Night Stories for Rebel Girls*.

Growing Genre Spotlight: Science Fiction

The movie *A Wrinkle in Time* was released in February 2018, which directly corresponds to the sales spike in Science Fiction. That being said, year over year, we are seeing slight overall sales increases in this genre.

Monthly Sales Performance – Science Fiction – Comparable Stores



As for seasonality, the genre as a whole is fairly flat with very slight increases over the summer months and the largest jump in sales happening in November and December.



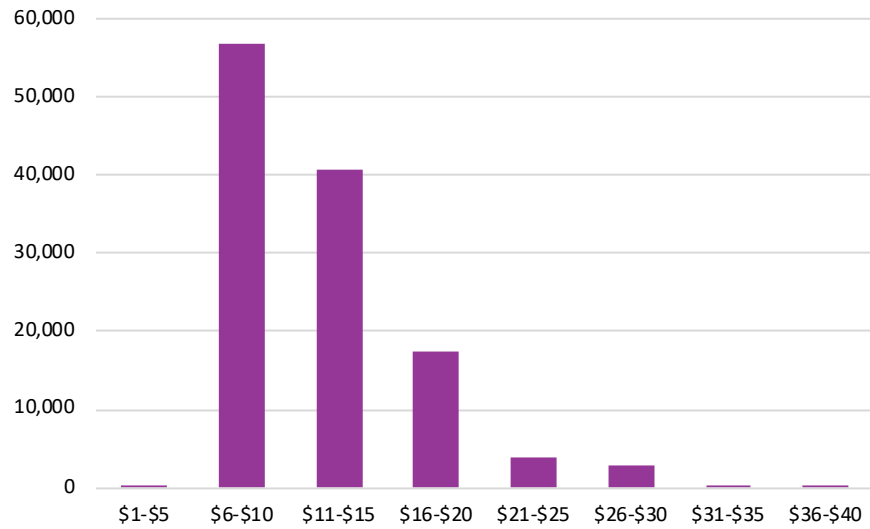
In 2018, the title occupying the top two sales spots were *A Wrinkle in Time* followed by the Canadian title, Kenneth Oppel's *Inkling*. In 2019, it was the same two books but in reverse order.

Top-selling titles for 2018 appeal to a wide variety of ages, including books from Quirk Book's Pop Classics series, which makes versions of books for early readers based on classics such as *Back to the Future* and *E.T. the Extra-Terrestrial*.

Madeleine L'Engle also makes it onto the top-selling list with other titles from the *Wrinkle in Time* series, including *Many Waters*, *An Acceptable Time*, and *A Swiftly Tilting Planet*.

When it comes to price point, the majority of titles that sell are in the moderate price range of \$6-\$15.

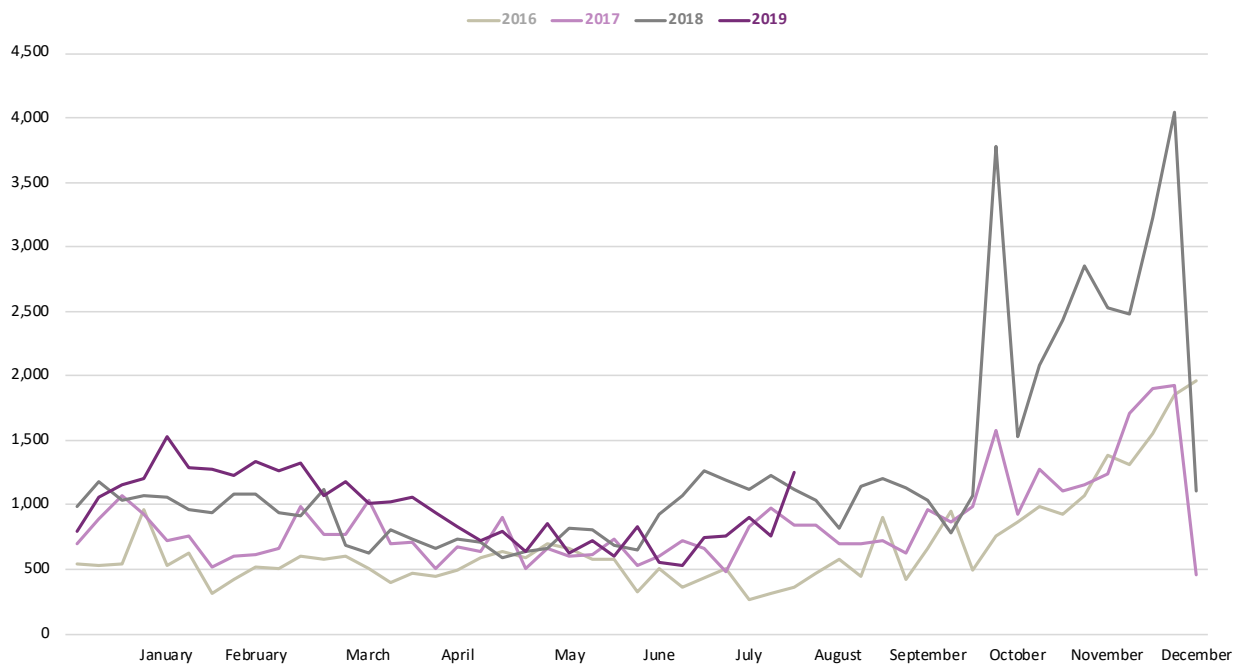
Science Fiction – Price Ranges

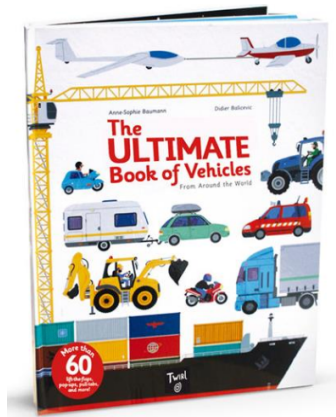


Growing Genre Subject Spotlight: Technology

In the Non-Fiction category, perhaps because of parental and educational emphasis on STEM-based subjects, we are finding growth in the Technology genre.

Monthly Sales Performance – Technology – Comparable Stores



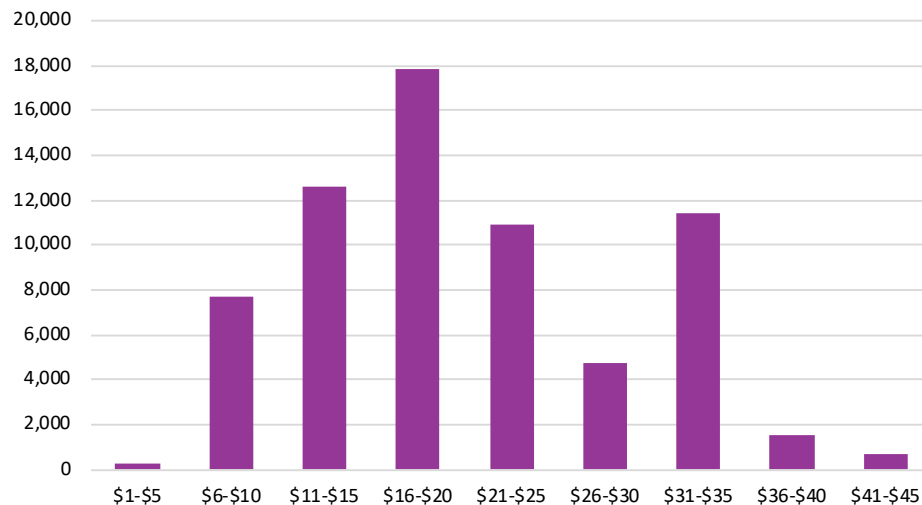


The top-selling titles in the category are predominantly from the Aeronautics, Astronautics & Space Science subgenre, containing titles such as *Smithsonian Build the Rocket* and *There's No Place Like Space*. The top spot for 2019 goes to Chronicle's board book, *The Ultimate Book of Vehicles*.

Interestingly, the two top-selling titles of 2019, *The Ultimate Book of Vehicles* and *Smithsonian Build the Rocket*, have notably higher price points (\$31.99 and \$26.99) than the majority of books selling in the category.

When it comes to price point, the majority of books with sales are in the \$11-\$20 range with the greatest number priced at \$16-\$20. Of the 10 top-selling books of 2019, five of them have a list price greater than \$20, with four of those over \$30.

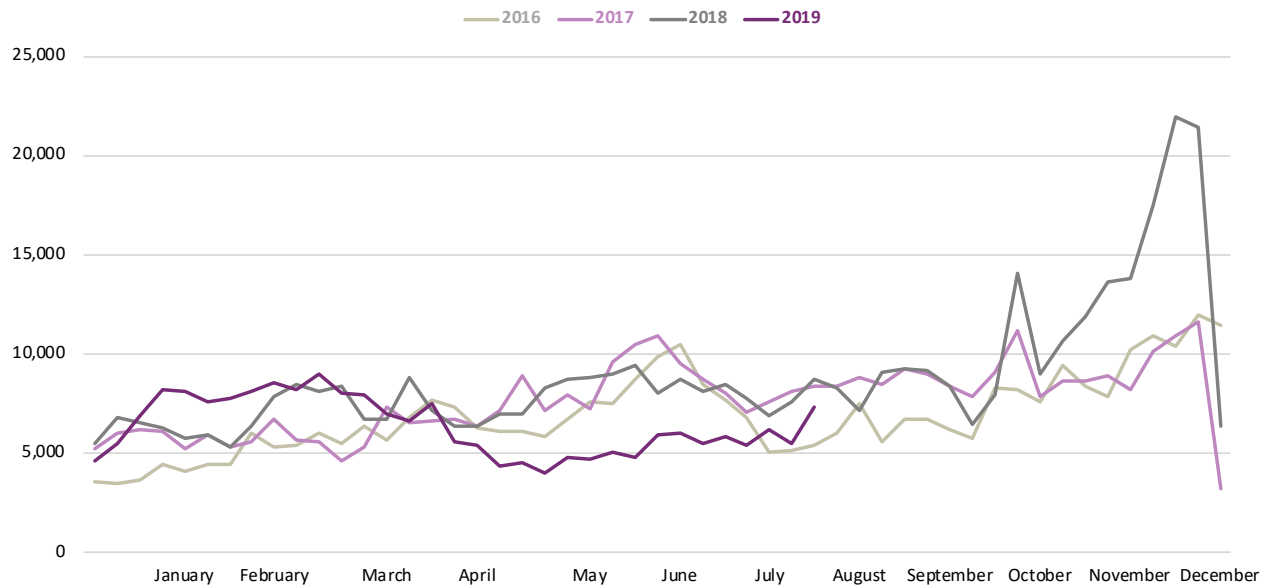
Technology – Price Ranges



Performance of STEM

In light of two of the top-growing genres being Science Fiction and Technology, it got us thinking about the performance of STEM (yes, we know Science Fiction isn't really part of this but we rolled with the association). There is no Juvenile BISAC code that is specific to engineering but searching for "engineering" in the titles indicated the majority of these books were categorized as either Science & Nature or Technology. So, if we categorize STEM as the Non-Fiction BISAC codes of: Science & Nature, Technology and Mathematics we find that while sales were generally growing year-over-year, 2019 is seeing slightly depressed sales as compared to prior years.

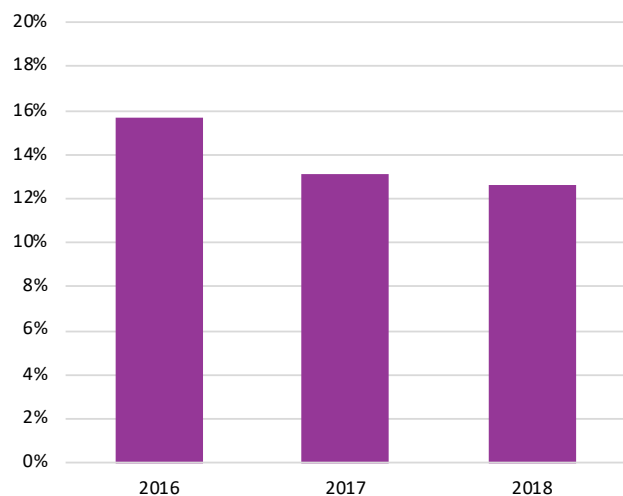
Monthly Sales Performance – STEM – Comparable Stores



Performance of Top 100 Titles

Many people wonder whether the bestselling titles are getting bigger and, by extension, if the bestsellers are cannibalizing sales of other front and backlist titles. In the Juvenile category, looking at the market share of the top 100 titles, we find that the power of these sales may be slightly declining. The graph below represents the percentage of sales for the top 100 titles in the Juvenile category within our group of comparable stores. While year-over-year variations are fairly minor, market share of the top 100 titles has declined by 3% between 2016 and 2018.

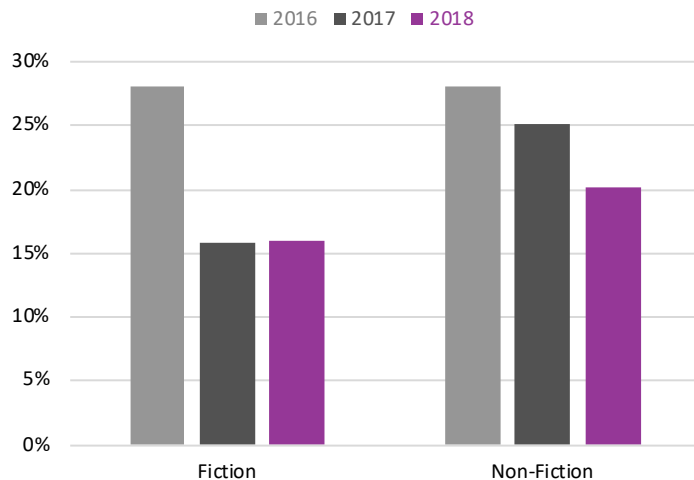
Top 100 – Percent of All Juvenile



Looking at Juvenile Fiction and Non-Fiction sales, we find a similar trend with Non-Fiction but Juvenile Fiction is a bit of a different story.

In 2016, the market share of the Juvenile Fiction top 100 was very high, at 28%. The title that is tipping the scale is J.K. Rowling's *Cursed Child*. If we remove *Cursed Child* from the data, we find that the top titles represent 15.5% of the market share, meaning that sales for the top 100 titles remain fairly proportionately consistent for Juvenile Fiction.

Top 100 – Percent of Juvenile Fiction – *Cursed Child* Removed – Comparable Stores



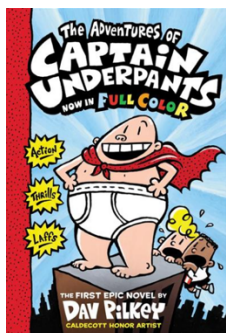
Series is King

When it comes to a sales analysis of series, one of the most important parts is the bibliographic data. Our analysis of the top-selling series is based on whether proper series information was included in the bibliographic data of each title. If titles didn't have the series listed, or if series names were not consistently used, then series information could not be properly tracked or included in the data below. The good news is that publishers have worked hard on their data for years and the following series data includes a total of 23,020 Fiction and 18,819 Non-Fiction titles.

Top 20 Fiction Series for 2018

	Units Sold	Books in Series
Dog Man Ser.	367,088	12
Peppa Pig Ser.	297,409	91
Captain Underpants Ser.	245,868	39
Step into Reading Ser.	237,412	552
Pictureback(R) Ser.	154,245	276
Robert Munsch Ser.	115,674	66
The Bad Guys Ser.	107,387	9
Big Nate Ser.	102,264	35
Beginner Books(R) Ser.	98,641	73
Amulet Ser.	98,297	31
Wrinkle in Time Quintet Ser.	96,899	17
Dragon Masters Ser.	94,436	26
Dork Diaries	90,864	24
Little Golden Book Ser.	88,166	403
Classic Seuss Ser.	84,151	51
The Land of Stories Ser.	81,998	25
Charles Reasoner Nursery Rhymes Ser.	79,363	8
Bright & Early Board Books(TM) Ser.	79,028	32
Wings of Fire Ser.	76,917	25
Where's Waldo? Ser.	74,187	30

Fiction series represent a staggering 40.3% of all Juvenile Fiction sales (2018). If series is king then Dav Pilkey could be called the king of kings. Two of his series, Captain Underpants and the more recent Dog Man, are dominating. Captain Underpants has been around since 1997. As an aside, in 2012 the American Library Association publicized that the Captain Underpants series was topping the most frequently challenged list with the reasons: “offensive language, unsuited for age group.”¹ Even though Captain Underpants continues to sell extremely well, the series was concluded in 2015, allowing the more recent Dog Man to come on to the scene.



¹ Banned & Challenged Books. (2020). *Top Ten Most Challenged Books Lists*. [online] Available at: <http://www.ala.org/advocacy/bbooks/frequentlychallengedbooks/top10-2012> [Accessed 10 Jan. 2020].

Top 20 Non-Fiction Series for 2018

	Units Sold	Books in Series
Klutz Ser.	155,587	158
Scholastic Early Learners (Cartwheel - US) Ser.	122,096	40
Readers Ser.	63,344	186
Big Fat Notebooks Ser.	59,225	5
Popular Complete Smart Ser.	45,341	27
Who Was? Ser.	42,562	171
Brain Quest Decks Ser.	37,324	14
National Geographic Little Kids First Big Bks.	35,793	21
First 100 Ser.	34,508	20
Dover Little Activity Bks.	27,527	180
Mad Libs Ser.	27,315	104
Klutz Junior Ser.	22,108	9
NGK Chapters Ser.	20,808	43
Build It Ser.	20,700	5
Step into Reading Ser.	19,425	110
Wipe Clean Learning Bks.	18,192	12
Baby Touch and Feel Ser.	18,007	39
National Geographic Kids Ser.	17,565	45
Alphaprints Ser.	15,548	7
Tell Me Bks.	15,231	2

Non-Fiction series, while more modest than Fiction, still represent 29.5% of all 2018 Juvenile Non-Fiction sales. Topping the list is the Klutz series. From making clay charms to learning to sew, Klutz comprises activity books and kits. With Klutz being such a large series, and the longevity of the content, many backlist titles are still selling well.



Publisher Challenge – Do an in-depth analysis of your series data. Consumers read series and the only way they can find this information online is if it is clearly searchable. This means that not only do the data fields need to be populated but the series names need to be consistent too.

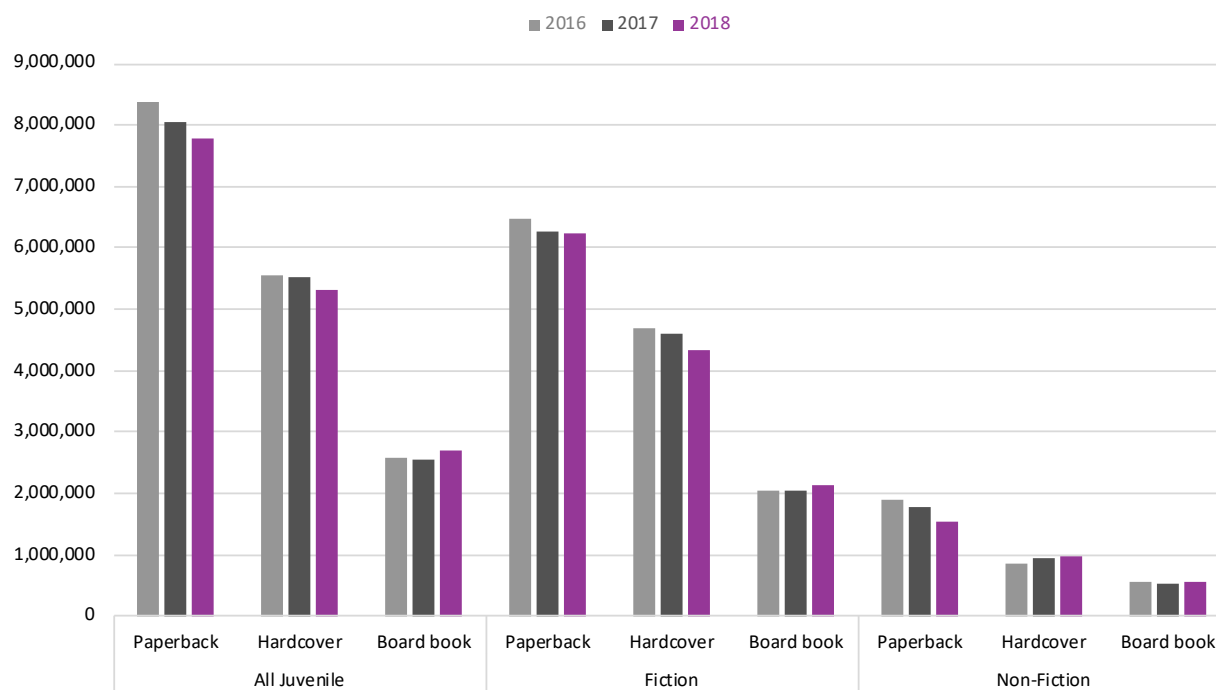
Format Analysis

As the market has shrunk slightly overall, there is a corresponding decline in some specific format sales, and this applies most consistently to paperbacks. But, once again using data from a set of comparable stores, we find that the sale of formats can be dependent upon the subject.

Looking at hardcover sales for the past several years, we find a notable decline in Juvenile Fiction but slight increases in Juvenile Non-Fiction. Paperbacks, while on the decline, have a slower rate of decline in Fiction than Non-Fiction with Fiction paperback sales being relatively flat between 2017 and 2018. It is only the board book format, which we will look at in more depth, that is seeing a consistent increase across both Fiction and Non-Fiction categories.

Overall, hardcover sales have remained relatively flat while paperback sales have seen a decline. Some of that decline may be shifting to other formats, with increased sales in categories such as mixed media and other book format.

Format Performance by Subject – Comparable Stores



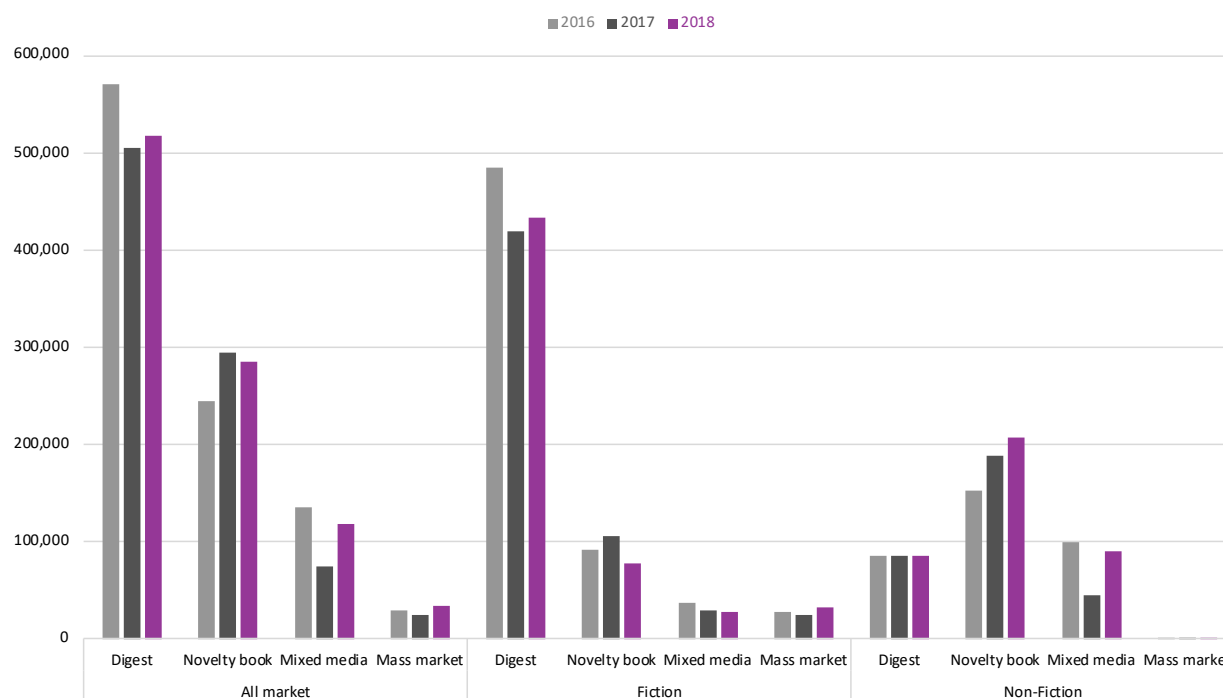
To drill down, we selected some of the more specific secondary formats and compared them across top-level subjects. While mass market may not generally be considered a format that is commonly used for Juvenile titles, we find that sales for this format are fairly flat over the past three years.

Digest paperbacks (think of a slightly larger version of a trade paperback used for books such as Captain Underpants and The Magic Treehouse series) have seen some recent growth in Fiction. Some of this might be due to the incredible sales of the Captain Underpants series.

Mixed media, in both Fiction and Non-Fiction, have seen slight increases in the market. Mixed media refers to books that are combined with a non-book product, such as a small LEGO® set sold with a character encyclopedia or a book that comes with cardboard cut-outs to assemble a paper version of the human body (cool stuff).

Novelty books are also selling well in both the Fiction and Non-Fiction categories. (Think *Pat the Bunny* or a screaming goat toy that comes with, yes, you guessed it, *The Screaming Goat* pocket guide).

Secondary Format Performance by Subject – Comparable Stores

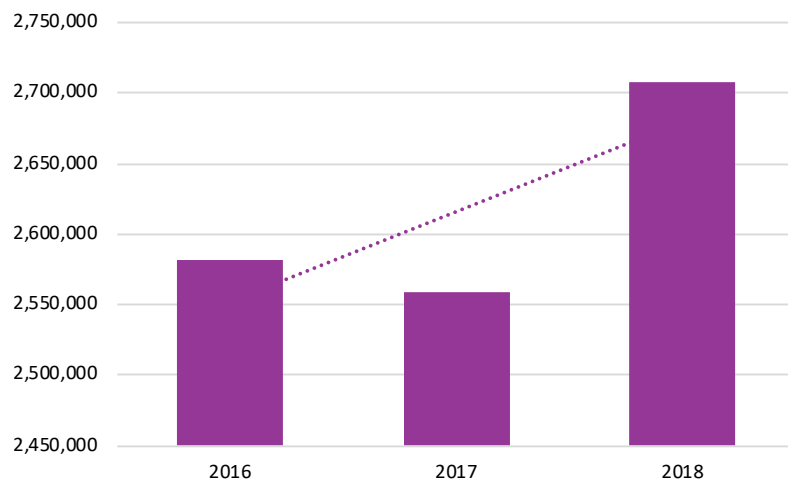


Board Books

A steady increase in the sale of board books has been reported in the US.² When we look at our comparable store data in Canada, we find there is fluctuation over the past three years with a big increase in 2018.

² Harbison, J. (2019). *Category Snapshot: The Benefits of the Board Book Boom*. [online] PublishersWeekly.com. Available at: <https://www.publishersweekly.com/pw/by-topic/childrens/childrens-industry-news/article/81736-category-snapshot-the-benefits-of-the-board-book-boom.html> [Accessed 10 Jan. 2020].

Annual Sales Performance – Board Books – Comparable Stores



Picture Books

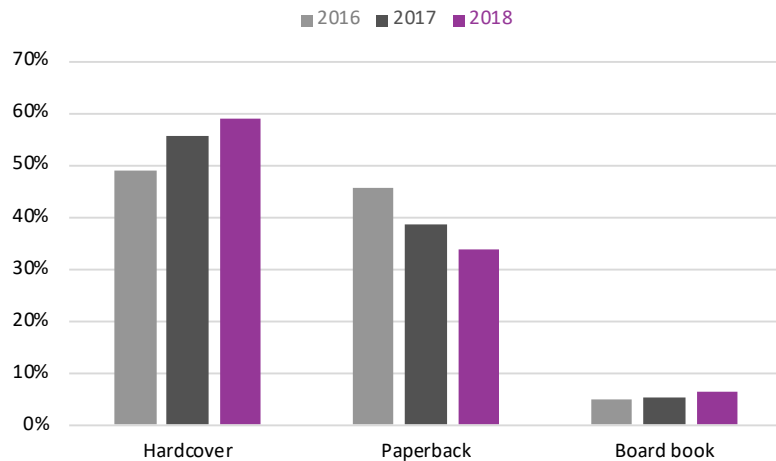
Often when we think of Juvenile books, we immediately think of picture books, those amazingly illustrated, glossy-paged works of art. Unfortunately, it can be difficult for us to research picture books because systems like BNC SalesData often carry only one format indicator — in a title’s bibliographic data, publishers can indicate more than one type of format, with picture books being just one of those options — and publishers tend to understandably prioritize format headings such as trade paperback and trade hardcover.

To get the data shared below, we extracted all ISBNs from [BiblioShare](#) (BookNet Canada’s bibliographic aggregation system) that were print format and had the “picture book” indicator listed among other possible formats. From this, we were able to extract more than 28,000 ISBNs, which we then analyzed in SalesData to gather their sales performance.

As a result, our data set may not include all picture books available in the Canadian print market, but it is a strong representative sample indicating sales performance.

Using this data sample, we have examined how picture books are selling and what the top-sellers are in this format. Interestingly, we find that sales of hardcover picture books are increasing year over year while paperback picture books are on a decline. While not as strong, we are also seeing increases in the sale of board books (further supporting what was illustrated above).

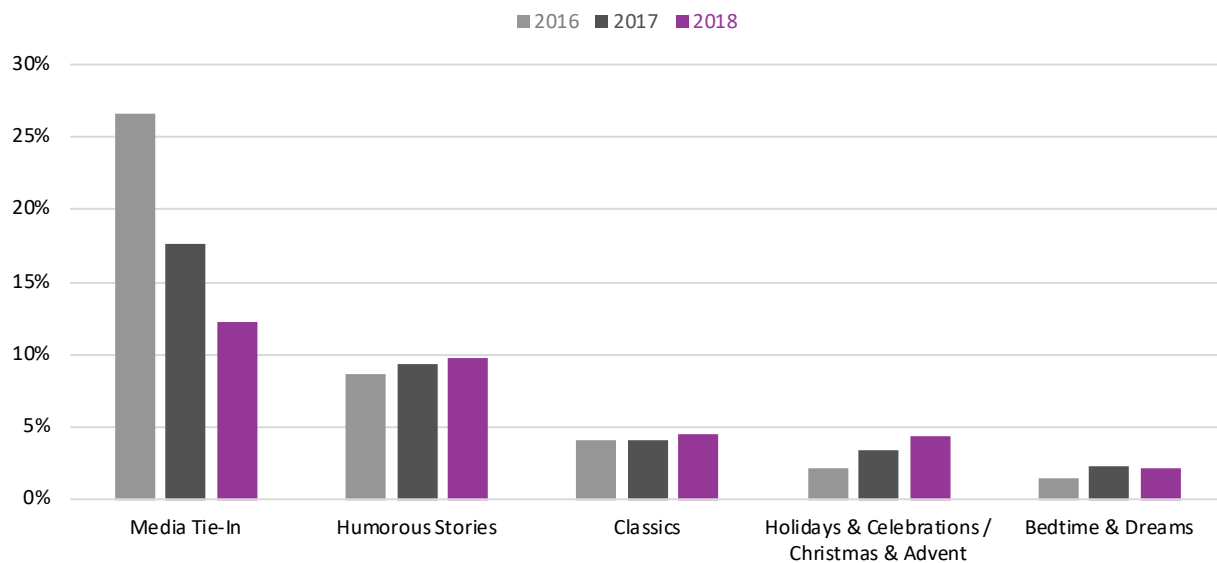
Annual Format Performance – Picture Books – Comparable Stores



To examine sales of picture books by subject, we have taken the format's top-selling genres in 2018 and compared them to the prior two years.

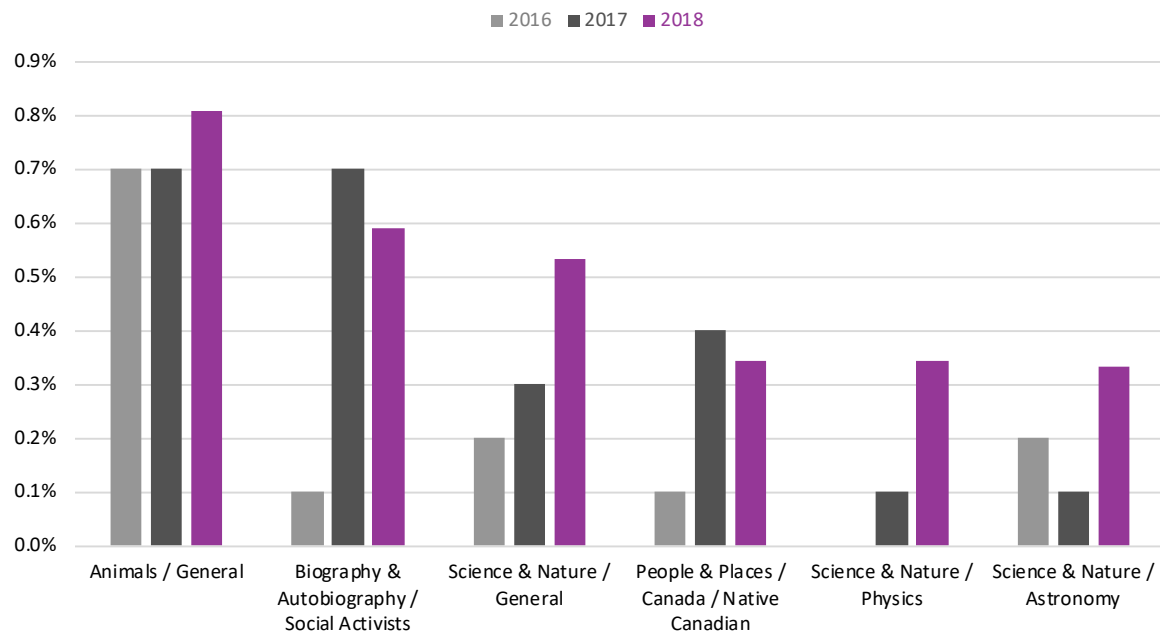
Media Tie-In is the largest selling genre in 2018 but it has seen a notable decline. It includes titles that connect to popular television or media characters such as Paw Patrol, Charlie Brown, and Franklin. We are seeing increases in the Humorous Stories category, as outlined previously, along with Holidays & Celebrations / Christmas & Advent.

Picture Books – Market Share of Fiction Genres



Non-Fiction picture books represent much smaller sales in the Juvenile category. Animals / General holds the lead, with Science & Nature / General seeing notable increases.

Picture Books – Market Share of Non-Fiction Genres



5-Minute Stories

One phenomenon publishers have asked us about is whether there is growth in sales for 5-Minute Stories. These books tend to focus on a younger market and span such topics as Disney books, nursery rhymes, superheroes, and Bible stories.



To determine sales performance for these types of books, we searched for any titles with “5-Minute Stories” as a title or series name (as there is no standardized category or data point), and limited data to our comparable stores to allow for a consistent year-over-year analysis.

We found that, over the past three years, the availability of these titles is growing in the market: While there were fewer than 100 titles selling in 2018, this was 16% more than in 2017. There was also a 46% increase of sales for these titles.