

# Global Trends Guide

A Guide to the Global Trends Affecting  
Publishers Today & How to Successfully Respond



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## Introduction

Recent global market issues have been a pain point for just about every industry as we now go through another year of shortages, delays, and rising transportation costs. On top of that, businesses must predict their consumers' changing needs and habits as they tackle on and off restrictions due to COVID-19.

As a global book distribution and services company with operations and relationships as a wholesaler in addition to publisher services, we at Ingram have a unique perspective on supply chain challenges and consumer shopping as it pertains to the publishing industry.

This guide will use that perspective to analyze global market and consumer behavior trends while mapping out how publishers are successfully responding to both.



“Inflation has risen in many countries, but rarely as much as in the U.S.”

↑ **6.2%**  
Brazil

↑ **5.8%**  
Turkey

↑ **3.8%**  
U.S.

↓ **1.9%**  
China

↓ **2.2%**  
Argentina



# Global Trends Affecting Book Production & Distribution

Using our aggregate data across tens of millions of titles, varying geographies, and numerous publisher segments, we've compiled an in-depth analysis on the key global trends affecting book production and distribution.

## Supply Chain & Logistics Pressures

### Inflation

According to the [PEW Research Center](#), inflation is happening in almost every country, with the US being one of the top countries affected. There's not a part of the book industry that's immune to the pressures that we see across the supply chain. Like a virus, inflation in the labor market impacts all materials needed to manufacture books.

### Paper Shortages and Shipping Costs are Rising

To no surprise, the most significant impacts to the book industry supply chain are paper shortages and shipping prices.

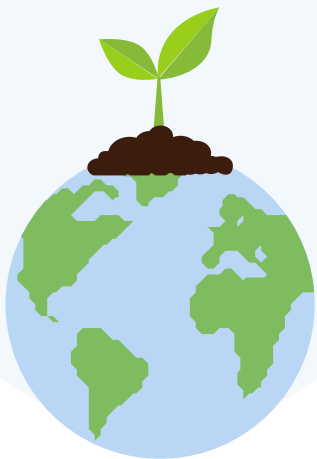
- The Wall Street Journal reports that the cost of a container ship shipping from Shanghai to LA is projected to reach a 50 to 75% increase.
- FedEx and UPS will have roughly a 6% increase for their transportation services in 2022.

In 2021 the [U.S.](#) and [UK](#) paper markets saw a 10% to 12% price increase. Due to staffing issues, shipping delays, and plant closures this continued into 2022.

Transportation delays and inflated costs are starting to drive new behaviors in our clients and publishers—forcing the market to find plausible solutions to this growing issue.

**Consider [printing titles on demand](#) to reduce print runs, keep up with shipping delays and expand your market.**





## Sustainability & Reducing Carbon Output

### Green House Gas Emissions

International freight [produces around 30%](#) of global greenhouse gas emissions. This has been a big issue for the publishing industry and the world over as new and new regulations have been put in place to help deal with the growing carbon problem. Outside of that, printers and distributors are doing their part to reduce greenhouse gases produced from international shipping as much as possible.

## How Publishers Are Responding and Finding Success

### Planning Ahead

As we've settled into 2022, we've seen some printers in the market not taking new orders through the first half of the year due to limited capacity.

Combine this with delayed shipping times, and now publishers are taking the initiative to go to press four to six months in advance of their book's publication date.

Supply chain and transportation delays are also impacting books getting from warehouses to retailers on time, resulting in slower retailer pickups. Planning ahead allows publishers to ensure their books are where they need to be on time, despite delays.



### Reducing Print Runs

We've also seen publishers printing to sales rather than printing to stock, which allows them to focus more resources toward evergreen titles and predictable selling titles. When publishers don't have a large amount of stock sitting in a warehouse, they're not incurring excess inventory fees, which allows for more flexible retail pricing on future printings.



### Catalog Review and Management

A growing number of publishers are looking at their entire catalog and asking, "Is my backlist more applicable for digital printing than it may have been in the past?" This sort of questioning is changing how publishers manage their inventory, allowing them to:

- Move their catalogs into a digital short-run or a pure print-on-demand model, which frees up capital to use toward frontlist titles.
- Have a conversation about the retail pricing of their titles catalog wide. As titles are moved into shorter run models, the likelihood of increasing the price of those titles is high. Of our clients releasing their frontlist, we're now seeing many at slightly higher price points than in the past.



**Combine your existing inventory with [short-run printing and print-on-demand](#) to help grow your business.**

## Diversifying Formats and Suppliers 🛒📁

In today's market, it's best to have numerous print vendor relationships. In tandem with diversified files like ebooks and audiobooks, titles can be used at offset press as well as digital or print-on-demand printers—giving you the option of short-run in case of delays in your schedule.

When publishers diversify formats, they're also giving consumers somewhere to go if the print book is not available.

**Streamline your distribution services to manage and sell print books, ebooks and audiobooks together.**

## Warehouses! And Lots of Them 🚚🌱

Another massive trend hoping to reduce the carbon output of shipping (while also alleviating shipping delays) is the use of warehouses. Since the mid-'80s, there's been a considerable shift to online bookselling, only to be exaggerated to new heights due to today's Covid crisis.

- Less cost
- Faster delivery
- Reduced carbon output

Notice Ingram's change in carbon emissions between printing in the UK and shipping to that location versus shipping it overseas or even via air.

The impact of that is the booming growth of warehouses in various countries, with online trade fueling many of them. This is a trend we see continuing into 2022.

**Manage your inventory through our network of bookstores, libraries, and warehouses all over the globe!**



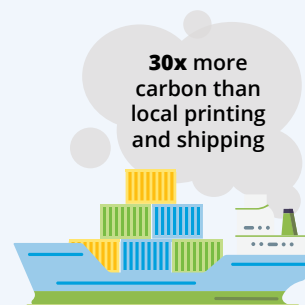
## Printing in Local Markets 🚚🌱

Smaller print runs give publishers the flexibility to print some titles in the US, some in the UK, some in Europe and Asia, etc. By taking advantage of printing in local markets rather than sending products over long distances, they can quickly get books to consumers and warehouses while mitigating transit issues. This also helps them print and distribute their titles in a more sustainable way, by lessening their carbon footprint.



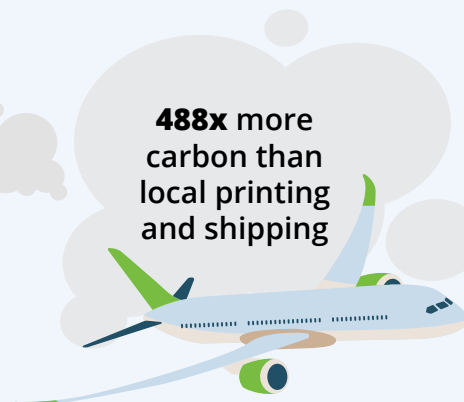
Local Shipping

Milton Keynes, GB to London, GB



Sea Shipping

Nashville, TN, USA to London, GB



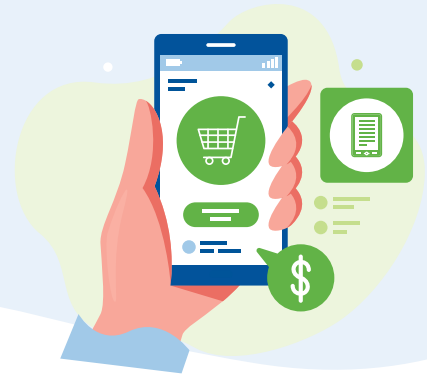
Air Shipping

Nashville, TN, USA to London, GB

**"International freight produces around 30% of global greenhouse gas emissions."**

[Source: DHL Carbon Calculator](#)

# Key Trends in Consumer Behavior

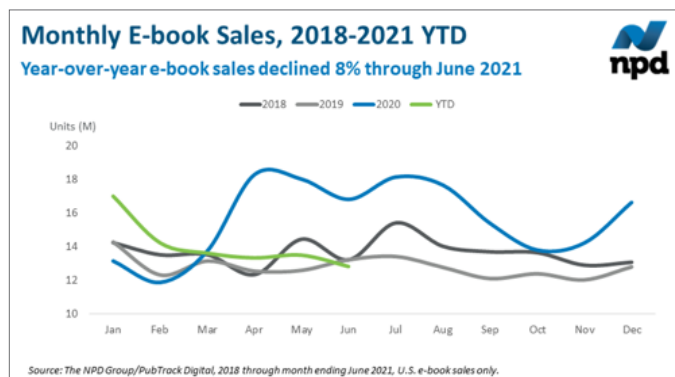


## Ecommerce & Streaming Have Changed the Game 🛒

Despite a dampening effect one year into the pandemic, ecommerce is way up and is continuing in that direction. A significant reason is consumers shifting to online shopping like never before. What started as a necessity or convenience soon became the preferred way for consumers to purchase specific products - including books.

### Are Ebooks Down?

According to NPD, during the first half of last year ebooks were down compared to 2020 by about 5% in unit sales. This may differ slightly from publisher to publisher and within genres, however it does beg the question of whether ebook readership is beginning to stagnate.



## Streaming Wave

NPD reporting also showed that ebook unit sales grew 6% over 2019. Seems counterintuitive right? A large reason for this growth has come from streaming

- OverDrive, which powers library, ebook and audiobook sales and downloads for consumers, had half a billion digital book downloads in 2021.

- Kindle unlimited announced in October 2021 they paid 40 million in royalties to publishers and authors of the top 100 most read titles in the U.S., and the top 25 most read titles in the UK. That's a significant amount in royalties when you consider it's based on pages viewed.
- Wattpad was acquired for 750 million dollars by the company behind WEBTOON. These websites and applications average 400 million monthly visits, with an average time spent on the sites or apps over 20 minutes.

You won't find this information reported by NPD, as the streaming platforms empower this data. These transactions are happening in a complicated space for most to truly analyze, but it's a consumer trend we think is significant.

## The New Omnivorous & Socially Conscious Shopper 🏠

### The Shift in Reader Habits

According to a Pew Research Center study, the number of U.S. adults reading has barely changed in the last ten years, moving from 78% to 75% - still a large addressable market! Of that market:

- 65% read a print book (down from 72%)
- 30% read an ebook (up from 17%)
- 23% listened to an audiobook (up from 11%)

From this data, it's clear that print remains the dominant format, however both ebooks and audiobooks essentially doubled in terms of their penetration into the market.

The study also goes on to dispel the myth that an ebook reader exclusively reads ebooks and no other formats,

with only 9% of readers report that as being the case. In reality, a third of U.S. adults were shown to have more omnivorous reading habits, reporting to have read both print and digital formats.

## Know who your readers are, where they're active, and how they talk about books that interest them with [Reader Insights Reports!](#)

### The OmniChannel Shopper 🏪

Building on this shift in reading, we've seen a new consumer emerge - the omnichannel shopper. They are comfortable buying online and in-store, ebook and print formats, indie bookstores or chain stores - they're multi-format, multi-channel, and multi-retailer within those channels.

According to a [McKinsey & Company study](#) done on U.S. shoppers over the summer of 2021, most consumers are shopping in an omnichannel way, doing a combination of online and in-store, which is good news for the book industry.

[See Figure 1.](#)

Breaking this down further by those who purchased books, magazines and newspapers, 61% reported purchasing goods online and offline, with only 13% who exclusively research and purchase in-store and 26% who exclusively research and purchase online.

### Value-Based Shopping 💰

A key trend that caught the eye of many companies in 2021 was value-based shopping. Between Shop Indie campaigns, Black Lives Matter campaigns, and everything in between, it became evident that consumers were more likely to do business with companies, brands, and authors that aligned with their values.

And we see that trend continuing, as shown by a [2022 Customer Loyalty Study](#) across brands (non-book specific). In the study U.S. consumers were asked what keeps them loyal to their favorite brands.

- 22% stated a "strong sense of community"
- 16% stated a "positive social impact".
- 17% stated "better prices"

Surprisingly enough, positive social impact lies just behind better prices when it comes to creating customer loyalty.

Just look at how values-based shopping played a role in the media growth of bookshop.org from July –December 2021.

[See Figure 2.](#)

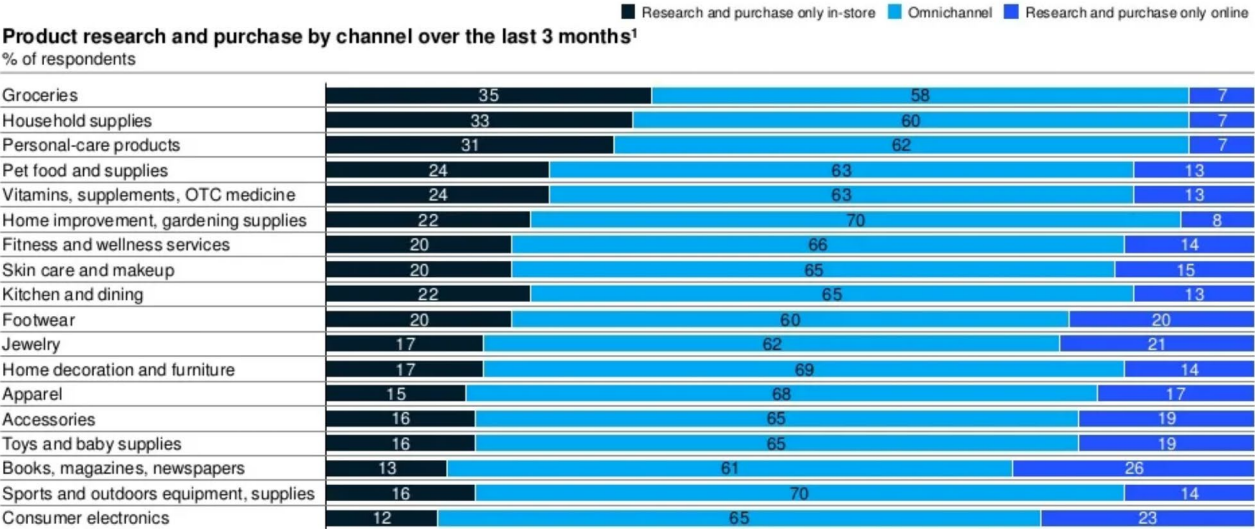
Their growth has been consistent and steady, with no sign of falling off like other indie fads over the past two years. We can attribute part of their staying power to their ability to be a part of the community, as a large value prop of bookshop is supporting local bookstores. Shoppers are willing to put money behind brands they respect and identify with.





Figure 1

# Six or seven in ten consumers shop across all categories in an omnichannel way



1. Q: Which best described how you have researched the following categories over the last 3 months?  
Source: McKinsey & Company COVID-19 US Consumer Pulse Survey, 10/9-10/15/2021, n = 2,095, sampled and weighted to match the US general population 18+ years  
McKinsey & Company 22

Figure 2

## Total Visits to bookshop.org ⓘ

Growth & total visits to bookshop.org over time

📱 On desktop & mobile web, in the last 6 months





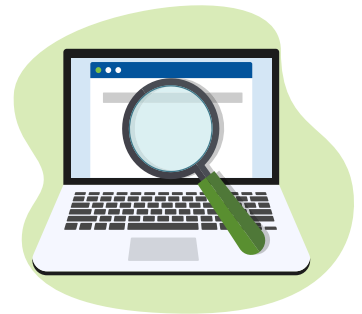
# How Publishers Are Responding and Finding Success

## Tactics to Drive Book Discovery, Interest, and Sales

### Enhance Search Engine Optimization 🛒 🏠 📖 💎

Given the growth of ecommerce, there are a lot of publishers looking to optimize their titles for search within online platforms. However, it's become increasingly difficult to get attention in these crowded spaces organically. To beat out the noise and the clutter of online competition, publishers are utilizing the following tactics:

- Search Engine Optimization – especially on Google and Amazon
- Social Media Marketing
- Email Marketing
- Paid Advertising – retail, social, search, etc.
- Merchandising & Promotions– both online and offline
- Brand Awareness
- Word-of-Mouth



### Good Book Descriptions 🛒 💎

To take advantage of the streaming craze and communicate clearly with your audience, your books need to grab the attention of a distracted consumer base. The best way to do this is to make sure your books are depicted accurately, with a great description.

Your book descriptions go out into a fractured landscape to be used and shared in many ways. The clearer your descriptions are, the less likely your message can be misconstrued. When consumers arrive, they understand what the book is and how it aligns with their interests.

An attractive book generates action - word of mouth, reviews, brand trust, and more sales.

### Data-Informed Sales & Marketing 🛒 🏠 📖 💎

Publishers are using reader data to work smarter and not harder, by optimizing their books for the consumer path to purchase. The more aggregated data on competitors, search engine result pages, market trends, and reading habits, the better you can understand consumer behavior and whether your sales strategy aligns with it.

Large data sets allow publishers to:

- Understand their audience better - speak their language to optimize descriptions.
- Reach readers directly - go where customers are and make sure their products are seen.
- Be authentic and add value - an excellent way of building consumer loyalty.



## Keeping Customer Loyalty 💖

Are you in touch with what really drives your customers? In today's market, community engagement, product quality, and price are the three main factors garnering customer loyalty. Good news for publishers and bookstores is that these are all things a brand can control.



For shoppers who believe an engaged community drives their loyalty to a specific brand, Publishers are focusing on their social media presence as well as other communal hubs for their customer base to learn, communicate, and stay up to date on the business.

Other important trends publishers are doing to engage customers are:

- Joining online groups
- Consuming brand related content
- Attending in-person event
- Receiving exclusive products or offers

Showing your customers that their dollars are going towards a business that has a positive impact on the communities they identify with is seen as a win-win in shoppers' eyes. That extra incentive creates loyalty, allowing publishers to grow their communities to a level that enables lower prices, discounted subscription models, and incentive-based programs for said community.

**Content sourced from [Publisher Insights with Ingram webinar "2021 Publishing Year in Review"](#).**



### Watch the Full Webinar

2021 Publishing Year in Review:  
Opportunities & Continuing Trends

[Watch on Demand](#)



Just as authors write the books you publish and sell, customers are writing the story of your brand, so it's imperative to engage with them on all fronts in order to control that narrative.

### Ingram's Global Supply Chain Solutions

Reducing print runs, printing as close to the customer as possible and reaching ebook and audiobook retail partners

[Learn More](#)



### Ingram's Consumer Marketing Services

Real-time marketing recommendations, Verified Reader insights and our Marketing Advantage program

[Learn More](#)

