



BNC RESEARCH

# Measuring Attitudes and Adoption of Digital Content for Kids and Teens



09.2013

PREPARED BY BOOKNET CANADA STAFF



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# Table of Contents

<b>4</b>	Methodology
<b>6</b>	Introduction
<b>8</b>	Use of Technology
<b>16</b>	Ebooks
<b>33</b>	Apps
<b>50</b>	Online Activity – Parents & Children
<b>53</b>	Online Activity – Teens
<b>61</b>	Reading Habits & Children
<b>65</b>	Giving A Child A Choice
<b>68</b>	Awarenesses & Influences – Parents
<b>71</b>	Awarenesses & Influences – Teens
<b>76</b>	Purchase Patterns
<b>81</b>	Library Use
<b>84</b>	Pricing & Tolerance
<b>90</b>	Conclusion
<b>93</b>	Appendix A – Next Steps for Industry Professionals
<b>95</b>	Appendix B – Demographics
<b>97</b>	Acknowledgements

# Methodology

BookNet Canada partnered with Bowker's PubTrack Consumer, a service of R.R. Bowker LLC, for data collection and processing. Bowker's PubTrack Consumer encompasses MarketTools Inc., an online market research firm, which was responsible for data collection from a representative English-speaking Canadian panel.

Data was collected from 1,044 parents and young adults. Respondents fell into one of two categories: parents of children aged 0–13, and young adults aged 14–17 who had received parental permission to respond to the survey. The panel was representative, with equal participation based on the children's age and gender, and adequate geographic representation from all regions across Canada.

To ensure the highest quality sample, MarketTools used its patented TrueSample methodology to determine that people responded thoughtfully and accurately. Respondents were given an incentive for completing the survey, in the form of ZoomPoints that they can redeem for various goods and services.

## **SAMPLING DETAILS**

For each fielding, the survey responses received yield a margin of error well within the commonly acceptable ranges prescribed for consumer-based surveying and analysis. For these fieldings, the margin of error is  $\pm 3.1\%$  at a 95% confidence interval.

### **INFORMATION COLLECTED**

The survey questions were based on work previously conducted by R.R. Bowker with input from BookNet Canada in consultation with members of the Canadian publishing and retail communities.

The fielding was comprised of two surveys:

- Parents of children aged 0–13 completed the first survey.
- The second survey was completed by young adults aged 14–17, who were required to obtain permission from their parents to complete the survey.

The survey examined attitudes around book buying and reading, with a focus on reading habits and attitudes and behaviour around the use of ebooks and apps.

# Introduction

Juvenile books have experienced a level of change and opportunity not seen in most other genres. Juvenile titles, both children's and young adult, are at a crossroads between print and technology; children's publishers have lengthy lists of print titles to maintain, and are simultaneously tackling the new challenges of ebooks and navigating the technological world of app development. Reading is still an important element of home life, but both parents and children are spending increasing amounts of time online, reading digitally and turning to apps for education and entertainment.

The objective of this study is to review parents' and teens' attitudes towards reading and technology, explore how they are spending their time, and examine how new behaviours and technologies are transforming the way families find, access and consume the written word.

Children's publishing enjoys access to unique sales and marketing channels compared to the general trade book market, including library and school book fairs and sales. On top of this, a new market has opened up with the unprecedented cross-over popularity of young adult books among adult readers.

It is problematic to compile all children's books under the same banner. Board books for a 1-year-old are drastically different from pop-ups for a 4-year-old or chapter books for a 9-year-old. To better differentiate the attitudes and behaviour of different age brackets, we have segmented respondents into three distinct groups:

- 0–8-year-olds: Children who are primarily reading with an adult
- 9–13-year-olds: Children who are reading chapter books with less interactivity
- 14–17-year-old young adults

Two similar but separate surveys were circulated. The first survey was completed by the parents of 0–13-year-olds, who were asked about their own behaviours and attitudes related to reading and technology, and then asked about family rules and behaviours: were their children allowed to read ebooks, use tablets or smartphones, or download apps. The second survey was completed by 14–17-year-olds with parental consent. With these young adults, the focus was on their own behaviours and attitudes, and how they see their behaviours evolving in the future.

# Use of Technology

In March 2013, Harvard University's Pew Research Center released a comprehensive U.S. study looking at teenagers' use of technology. One of the primary findings was that 95% of American teens are online, and "one in four teens are 'cell-mostly' internet users, who say they mostly go online using their phone and not using some other device such as a desktop or laptop computer."<sup>1</sup> In Canada we see comparable results, with 71% of teens reporting that they are regular smartphone users, and a continued trend among parents, teens and children towards multi-use devices.

## DEVICES

Parents have approximately 6.4 devices per household, while teens regularly use 4.8 devices

Earlier this year, Reuters released an article that predicted that by 2022 the average household with two teenagers living in it will have approximately fifty internet-connected devices.<sup>2</sup> With a statistic like this, a Jetsons-like future seems a lot closer than originally thought.

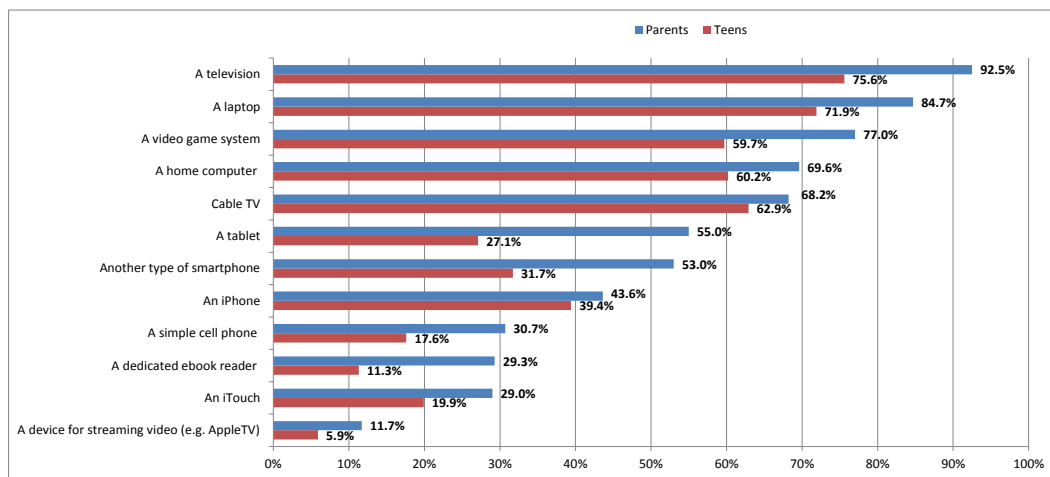
Respondents were given a multi-select list of devices to choose from. Parents were asked which devices they currently had in their household, while teens were asked which of the same devices they used on a regular basis.

On average, parents have approximately 6.4 devices per household, while teens are regularly using approximately 4.8 devices. 55% of parents currently own tablets, while only 29% own a dedicated e-reader. 27% of teens regularly use a tablet, though only 11% use a dedicated e-reader.

1 Pew Research Center, *Teens and Technology 2013*, March 13, 2013, p. 2.

2 Natasha Baker, "Home and health devices controlled by apps on the rise," Reuters, April 22, 2013, <http://www.reuters.com/article/2013/04/22/net-us-apps-home-remote-idUSBRE93LOBU20130422>.

WHAT DEVICES DO PARENTS AND TEENS HAVE?



Question (Parents): Which of the following devices are in your household?

Question (Teens): Which of the following devices do you use on a regular basis?

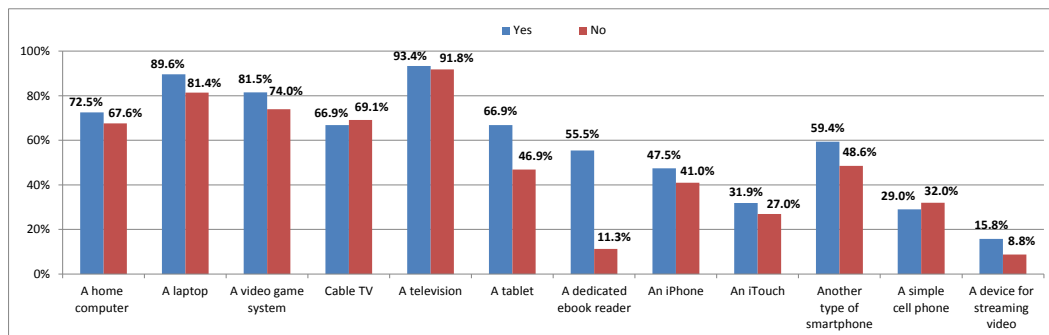
(Parents N= 823 respondents, 5,305 responses, Teens N= 221 respondents, 1,069 responses)

In order to assess how parents differ in their rates of technological adoption, we cross-tabulated the number of devices in a particular household by whether or not the respondent currently reads ebooks. We found that parents who currently read ebooks tend to be more significant users of technology, with an average of 7.1 devices per household versus 5.9 devices per household for parents who do not read ebooks.

Unsurprisingly, parents who read ebooks are significantly more likely to own a dedicated e-reader (56% vs. 11%). These parents are also more likely to own a tablet (67% vs. 47%), a laptop (90% vs. 81%), and ‘another type of smartphone’ (59% vs. 49%). Parents who do not read ebooks scored higher in only two categories: cable TV and simple cell phones.

**75%**  
of children ages 0–8 and  
**88%**  
of children ages 9–13  
use mobile devices

### DEVICES PER HOUSEHOLD BY ADOPTION OF EBOOKS



Question: Which of the following devices are in your household?  
Crosstab Question: Do you currently read ebooks (on any device or computer)?  
(N= 823)

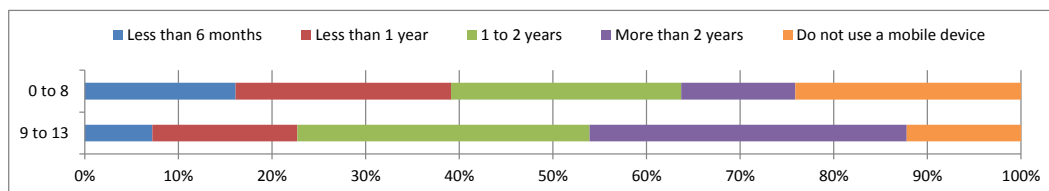
Earlier this year comScore released their 2013 Mobile Future in Focus whitepaper, which positioned Canada third overall for smartphone penetration (62%).<sup>3</sup> comScore research pointed to Android and iOS as the major market players in Canada, together accounting for 80% of the market (Android with a slight lead).

Parents who do not read ebooks are less likely to use an iPhone (41% vs. 48%) and even less likely to use ‘another type of smartphone’ (59% vs. 49%), which may point to the importance of brand awareness for late majority adopters of new technologies.

Given the rise in smartphone use, we asked parents how long their children had been using mobile devices. A quarter of children ages 0–8 (24%) do not currently use a mobile device; this number decreases significantly for children 9–13 (12%). For children 0–8 who currently use cell phones, many have only been users for less than one year (23%) or between 1 and 2 years (24%). The majority of children in the upper age bracket have been actively using cell phones for 1 to 2 years (31%) or more than 2 years (34%).

3 comScore, 2013 Mobile Future in Focus, February 22, 2013, p.17.

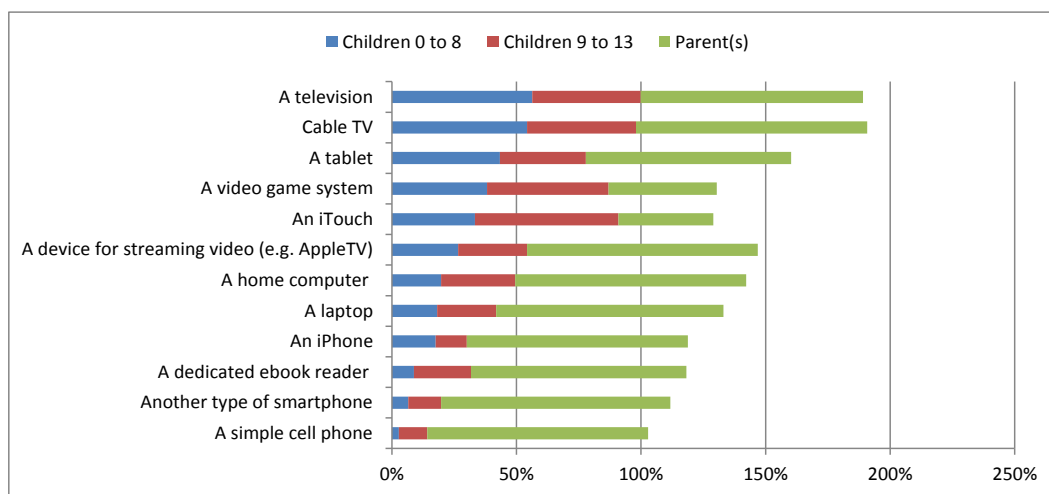
### HOW LONG HAVE CHILDREN BEEN USING MOBILE DEVICES?



Question: For how long have your children been using a mobile device?  
(0 to 8 N=614, 9 to 13 N= 401)

Generally, we found that parents are more likely to be regular device users than their children. On certain devices, children ages 0–8 seem to have higher usage rates than their 9–13 counterparts, particularly with shared devices such as televisions and tablets. Children ages 9–13 scored higher only on devices such as video gaming systems and the iTouch. A possible explanation for this is that children ages 9–13 are more likely to have the freedom to engage with technology on their own, without the same level of supervision that parents might feel is required for younger children, thus as parents are the primary users, younger children become the secondary users as they consume digital content together.

### FOR PARENTS WITH YOUNG CHILDREN, WHO REGULARLY USES EACH DEVICE?

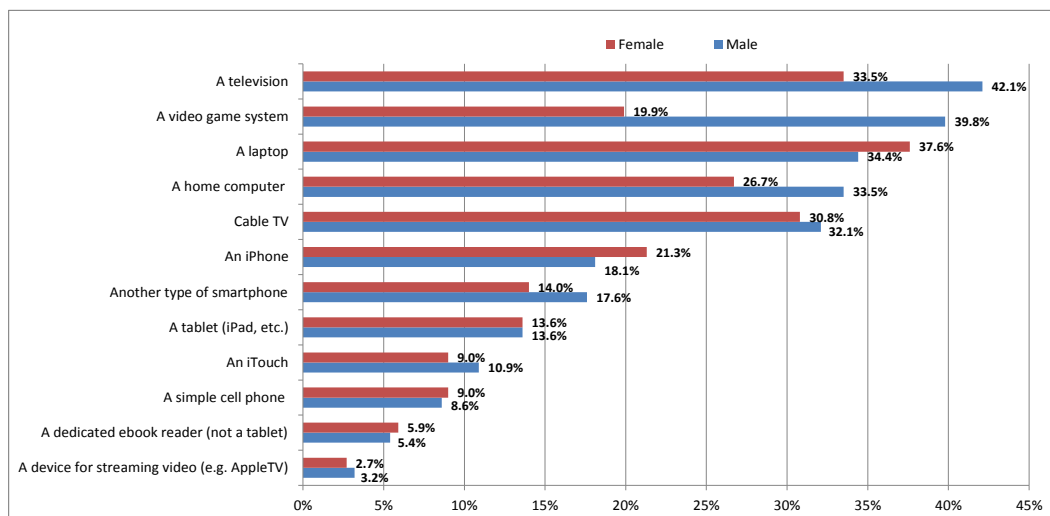


Question: Regarding these devices, who in your household is a regular user?  
(N= 94–752)

In the case of teens, there are a few interesting gender divides for those who regularly use each type of device. The most notable difference is seen in the use of video game systems: boys are significantly more likely than girls to be regular users (40% vs. 20%). Boys are also more likely to use regular televisions (42% vs. 34%) and home computers (34% vs. 27%), though girls are slightly more likely than boys to regularly use a laptop (34% vs. 27%), though girls are slightly more likely than boys to regularly use a laptop.

Girls are more likely to regularly use an iPhone (21% vs. 18%), while boys tend to make up the difference in being more likely to use ‘another type of smartphone’ (18% vs. 14%). This is in keeping with current research that has pointed to iOS as the preferred choice of adult women, whereas Android OS has gained significant ground with adult men.<sup>4</sup>

**DEVICE USE BY GENDER: TEENS**



Question: Which of the following devices do you use on a regular basis?

Crosstab Question: What is your gender?

(N= 221 respondents, N= 1,069 responses)

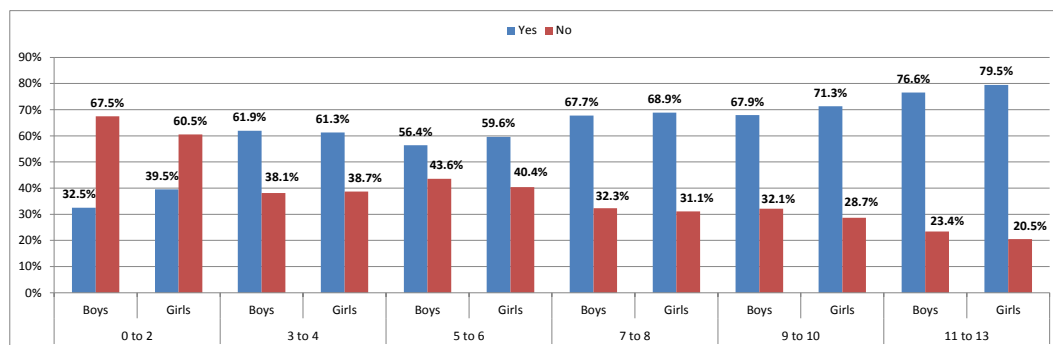
4 Katie Marsal, “Women want Apple’s iPhone, men prefer Google Android, Nielsen finds,” Apple Insider, December 01, 2012, [http://appleinsider.com/articles/10/12/01/women\\_want\\_apples\\_iphone\\_men\\_prefer\\_google\\_android\\_nielsen\\_finds](http://appleinsider.com/articles/10/12/01/women_want_apples_iphone_men_prefer_google_android_nielsen_finds).

## ACCESS & CONTROL

To better assess the point at which parents allow children increased access to devices, specifically the use of apps, we delved into more detailed age and gender brackets.

We can see from the graph below that there is a significant increase in children’s access to devices when they reach 3–4 years of age. Although differences according to gender in each age group are relatively small, it is interesting that girls are slightly more likely to have access to devices in every age bracket with the exception of 5–6 years, where boys hold a very slight (<1%) lead.

### CHILDREN’S ACCESS TO APPLE OR ANDROID DEVICES



Question: For your child or children, do they have access to Apple or Android devices, where apps can be downloaded?  
(N= 1,420)

## ACQUISITION AND FUTURE PURCHASES

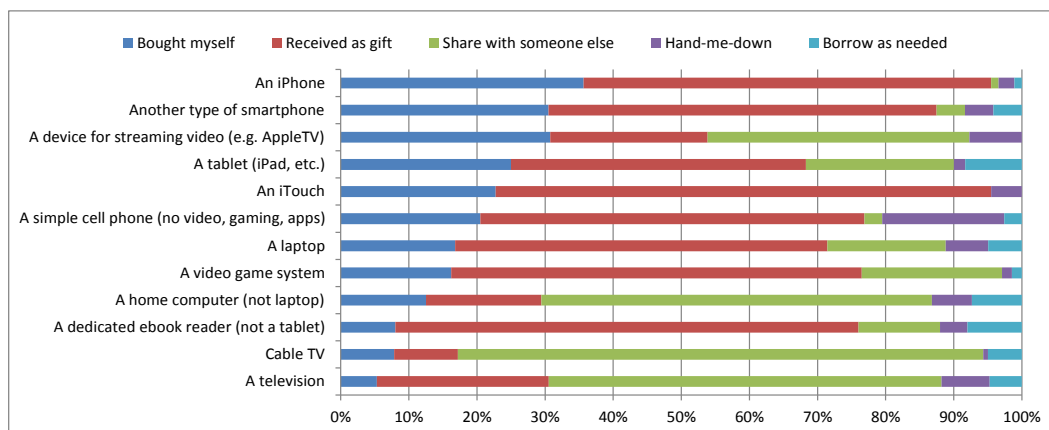
Dedicated e-readers are the second most gifted mobile device for teens

Whether teens purchase devices for themselves or receive them as gifts is a potential indicator of the importance of certain devices in their lives.

High-ticket items such as gaming systems, smartphones, tablets and laptops are the most likely ones for teens to receive as gifts—presumably because of the associated costs. The one exception to this is dedicated e-readers, which were the second most gifted item on the list.

When they’re spending their own money, the two items teens purchase most are iPhones and ‘other types of smartphones.’ It is interesting to note that while only 6% of teens currently own streaming video devices, these devices were the third most likely item for teens to purchase for themselves, which may be indicative of how new generations want to ingest content.

### HOW ARE TEENS ACQUIRING DEVICES?



Question: How did you get the device(s) you selected?  
(N= 13–167)

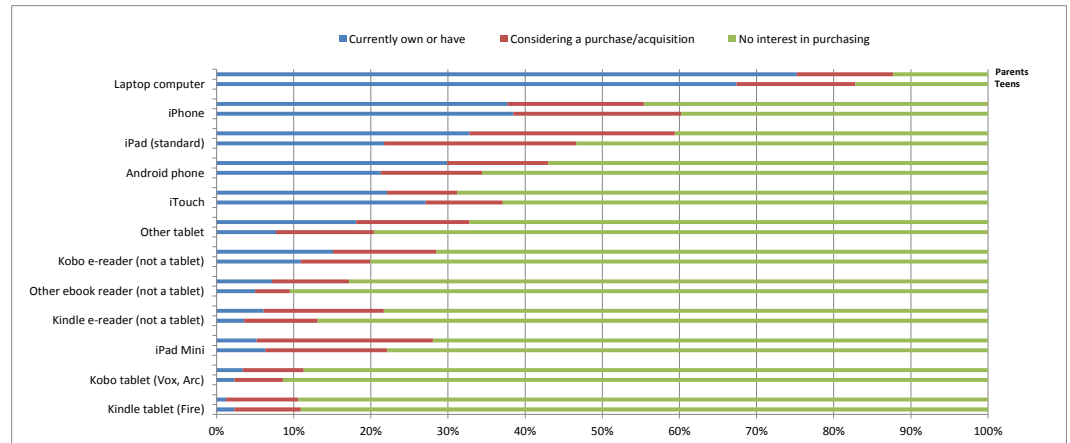
Parents and teens have little interest in purchasing dedicated e-readers in the future

Looking to the future, it is interesting to see which devices parents and teens are interested in buying and which may be entering the maturity or declining stages of their life cycles.

While parents generally own more devices than teens, the devices they are interested in purchasing in the future are remarkably similar. For both teens and parents, the top three devices considered for future purchase are the iPad, iPad Mini, and iPhone (though parents were more likely than teens to be interested in the iPad Mini—23% vs. 16%).

Parents are more likely to currently own dedicated e-readers, but their interest in purchasing them in the future parallels that of teens, who show little interest in purchasing dedicated e-readers, focusing instead on multifunctional devices such as tablets or smartphones. Kindle and Kobo as brands for tablets do not appear to carry much weight—teens seem to be focusing on Apple as the brand to acquire. With the pricing gap narrowing between tablets and dedicated e-readers, particularly for non-Apple products, many consumers are likely to lean towards a device that caters to multiple demands—something that seems particularly important for teens.

### WHAT ARE PARENTS AND TEENS INTERESTED IN PURCHASING IN THE FUTURE?



Question: Do you currently have, or are you planning on purchasing any of the following for any purpose, even if not for reading books? (Parents N= 823, Teens N= 221)

For publishers, this data could point to new potential marketing and merchandising strategies. To spend merchandising budgets most effectively, it is critical to know where consumers are finding and purchasing content. For electronic retailers whose business models depend on sales of devices and content, the pressure is on to create enough brand awareness to lure readers into purchasing from their retail front, regardless of the device they are using.

# Ebooks

As a primary part of this study, we wanted to review not only the rate of adoption of technology but also attitudes towards technology and, specifically, how parents' attitudes may impact their approach to their children's use of technology. If a parent is an active ebook reader, are they more predisposed to allow their children to read ebooks?

## WHO IS READING EBOOKS?

**41%**  
of parents and  
**27%**  
of teens read ebooks

41% of the parents surveyed stated that they currently read ebooks (on any device). This is a particularly interesting statistic in view of the fact that BookNet Canada's 2012 annual consumer study of adult book buyers found that only 18% of Canadian adults were actively purchasing ebooks.<sup>5</sup> One important distinction to note here is that we are comparing parents who read ebooks to general consumers who had purchased an ebook in the prior month. We address library use later in this study, but BookNet Canada's 2012 annual consumer study of adult book buyers found that respondents between the ages of 30 and 44 years are most likely to use the library. It may be that parents with young children undergo a notable increase in book consumption.

PEW research in 2012 found that 38% of parents in the U.S. were actively reading ebooks. What is really interesting about this finding is that they were significantly more likely to have adopted ebooks than their adult counterparts with no children (38% vs. 27%).<sup>6</sup>

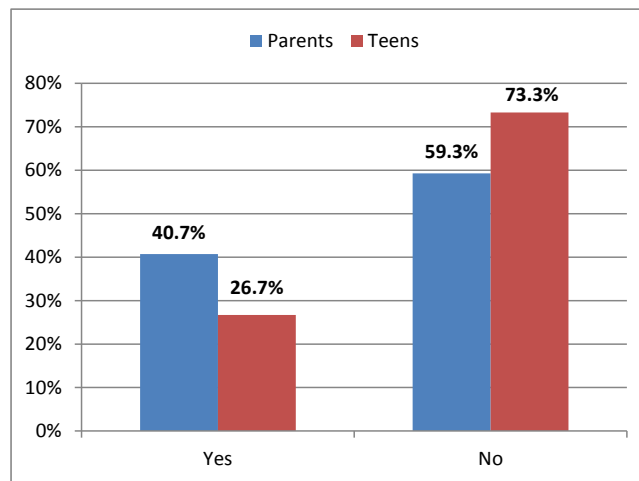
Only 27% of teens in the present survey stated that they currently read ebooks, which is less than has been seen in similar English-speaking countries. In 2012, Scholastic released U.S. data that pointed to significant increases in teens consuming ebooks: 48% of teens ages 12–14 and 43% of teens ages 15–17 had read an ebook in 2012, up from 27% and 25%, respectively, in 2010.<sup>7</sup>

5 BookNet Canada, *The Canadian Book Consumer 2012: Annual Report*, May 2013, p. 24.

6 Kathryn Zickuhr, "In a digital age, parents value printed books for their kids," Pew Research Center, May 28, 2013, <http://www.pewresearch.org/fact-tank/2013/05/28/in-a-digital-age-parents-value-printed-books-for-their-kids/>

7 Scholastic, *Kids & Family Reading Report 4th Edition*, January 11, 2013, p.6.

### PARENTS' AND TEENS' ADOPTION OF EBOOKS



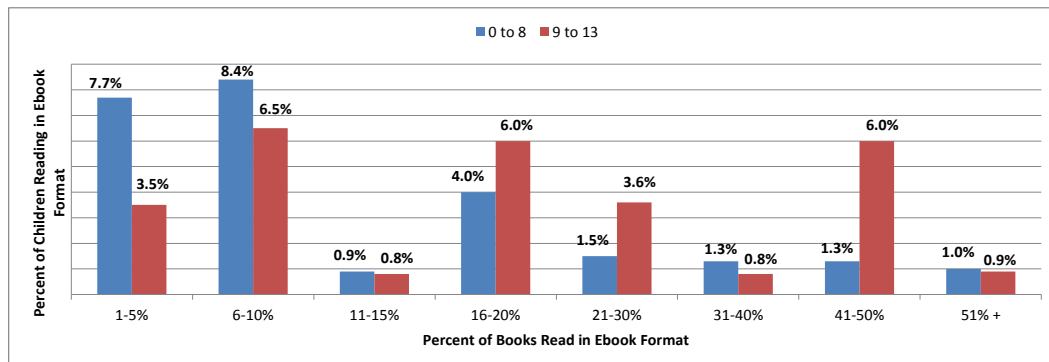
Question: Do you currently read ebooks (on any device or computer)?  
(Parents N= 823, Teens N= 221)

To assess how many books children were reading in ebook format, we asked parents to approximate the percentage of ebooks and print books that their children have read or have had read to them. For example, in the graph below, 8% of children ages 0–8 consumed 1–5% of their books in ebook format.

Print books remain the preferred format for children in both age groups: parents of both age brackets reported that 72–74% of their children have not read, or been read to, in ebook format.

There are slight increases in the percent of ebooks that children are reading by the time they are 9–13, though nothing significant enough to point to a dramatic increase related to age.

PERCENT OF BOOKS READ BY CHILDREN IN EBOOK FORMAT



Question: Approximately what percent of the books that your child has read (or that you have read to your child) are in ebook format? (0-8 N=454, 9-13 N= 369)

PARENTS: ATTITUDES TOWARDS THEIR CHILDREN READING EBOOKS

**63%**  
of parents prefer their children to read in print

The challenges that face parents today are leaps and bounds different from the ones their own parents faced just a generation earlier. Just how educational does a game or an app have to be to justify your child using it? Will learning to read on a device hinder the learning process? At what age is it appropriate for a child to have their own smartphone?

What we've found, and has been found in similar studies, is that while many parents are adopting new technologies, they are reluctant to have their children adopt these technologies at the same rate.

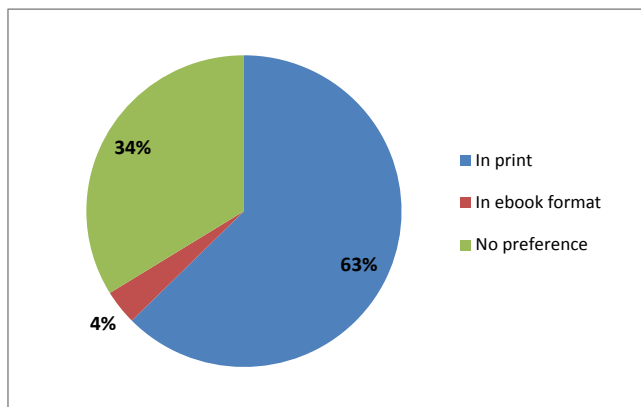
E-reading has increased significantly among adults in many English-speaking countries<sup>8</sup> — but that doesn't mean that these adults are ready to see their children reading digitally just yet. It seems that even the most technologically inclined parents are unsure how to navigate the integration of new technologies into concepts of good parenting. In April of this year, The Atlantic ran a series of articles titled *The Touch-Screen Generation*. What they found was that even parents who developed educational apps and ebooks for children preferred to monitor or limit the time their children spent consuming digital content.<sup>9</sup>

8 Bowker, "e-Reading Habits Drive Market Share Growth of e-Retailers, says New Study from Bowker," Bowker, March 18, 2013, [http://www.bowker.co.uk/en-UK/aboutus/press\\_room/2013/pr\\_03182013.shtml](http://www.bowker.co.uk/en-UK/aboutus/press_room/2013/pr_03182013.shtml)  
 9 Hanna Rosin, "The Touch-Screen Generation," *The Atlantic*, March 20, 2013, <http://www.theatlantic.com/magazine/archive/2013/04/the-touch-screen-generation/309250/>

Parents who read ebooks are more likely to be open to their children reading both electronically and in print

Although 41% of parents in the present study stated that they currently read ebooks, only 27% stated that they read ebooks with their children. In fact, when asked which format they preferred for their children aged 0–13 to do the majority of their reading in, 63% of parents stated that they ultimately preferred print.

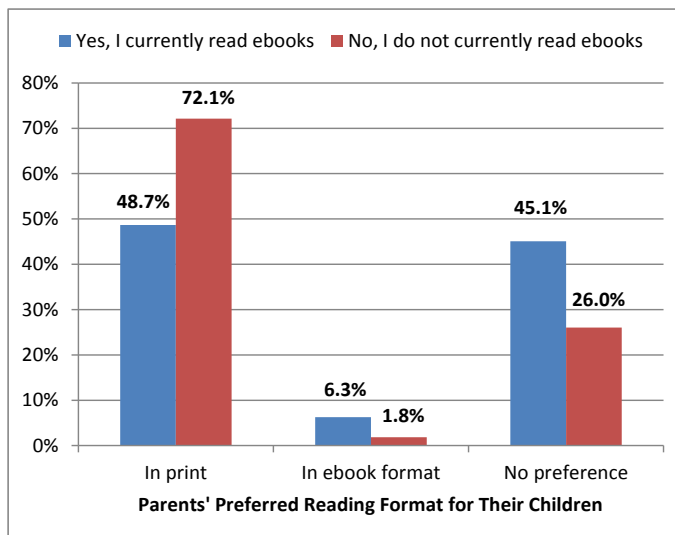
**WHICH FORMATS DO PARENTS PREFER THEIR CHILDREN TO READ IN?**



Question: How would you prefer that they do most of their reading?  
(N= 823)

We do see a difference, however, between parents who read digitally and those who do not. While, unsurprisingly, the consensus is unanimously against children reading primarily in ebook format, parents who read ebooks are significantly less likely to prefer only print (49% vs. 72%), while 45% stated that they had ‘no preference’ as to which format their children read in, compared to only 26% among parents who do not read digitally.

**PARENTS' PREFERENCE FOR CHILDREN'S READING – PARENTS WHO READ DIGITALLY VS. THOSE WHO DO NOT**



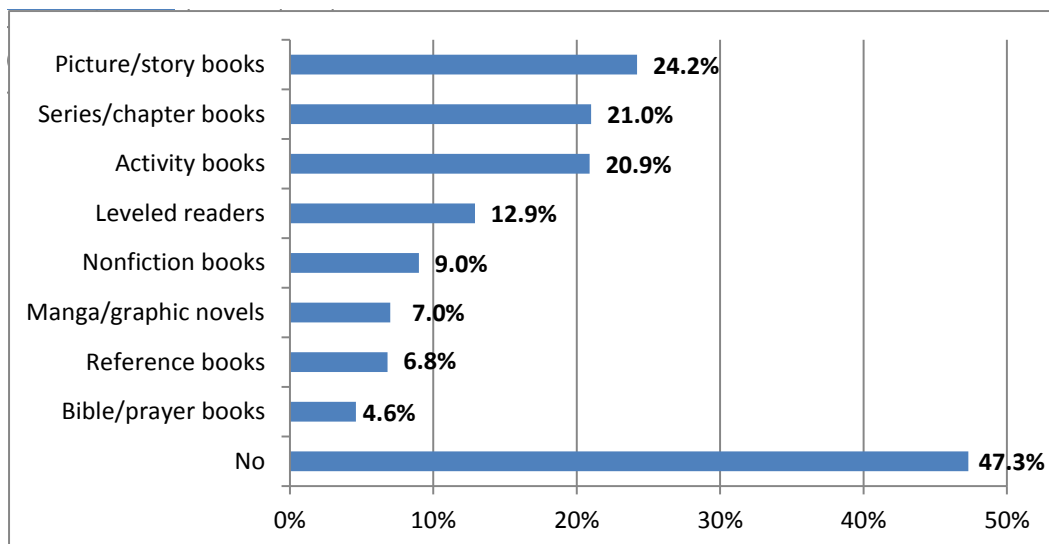
Question: How would you prefer that they do most of their reading?

Crosstab Question: Do you currently read ebooks?

(N= 823)

Parents were also asked if there were particular genres or types of books that they thought their children might prefer to read in ebook format. The top categories indicated were picture/story books (24%), series/chapter books (21%), and activity books (21%), though nearly half of parents (47%) felt that their children wouldn't prefer to read ebooks in any genre.

**SUBJECTS THAT PARENTS FEEL THEIR CHILDREN WOULD PREFER IN EBOOK FORMAT**



Question: Are there subjects that your child prefers to read as an ebook?

(N= 823 respondents, N=1,265 responses)

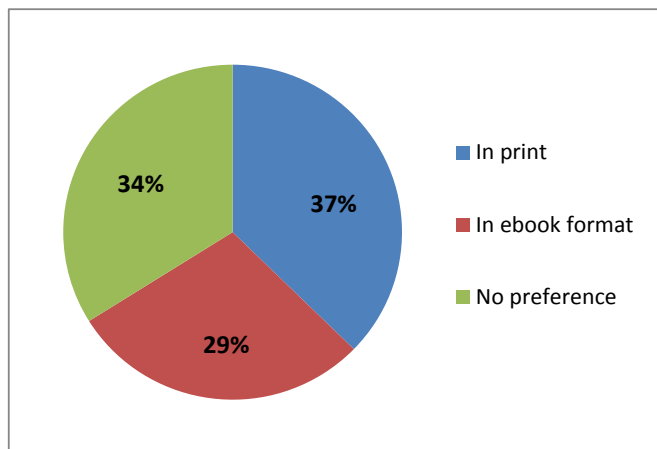
Of teens who read ebooks, **34%** don't have a format preference

## TEENS: ATTITUDES TOWARDS E-READING

We decided to isolate the 27% of teens who currently read ebooks to review their preferred reading format. Because fewer teens are reading digitally, the sample size for these questions is smaller, but there are still several distinct patterns that appear in the data.

Unlike we saw with parental responses, results are spread fairly evenly across the board. Print books are slightly preferred at 37%, compared to 29% of teens who prefer ebooks. 34% stated that they do not have a preference one way or the other.

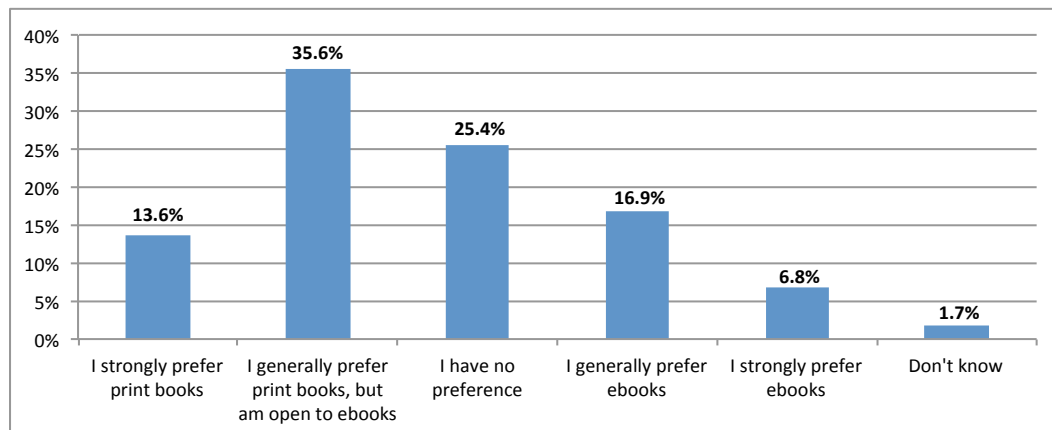
### FORMAT PREFERENCE AMONG TEENS WHO READ EBOOKS



How would you prefer to do most of your reading?  
(N= 59)

Delving a bit deeper into the data, we found that when it comes to strong preferences, 14% of teens who currently read ebooks feel that they 'strongly prefer' print, while 7% 'strongly prefer' ebooks.

### HOW DO TEENS WHO CURRENTLY READ EBOOKS FEEL THAT EBOOKS COMPARE TO PRINT?



To what extent do you like to read in one format versus another?  
(N= 59)

### PARENTS: BARRIERS / ADVANTAGES TO EBOOKS

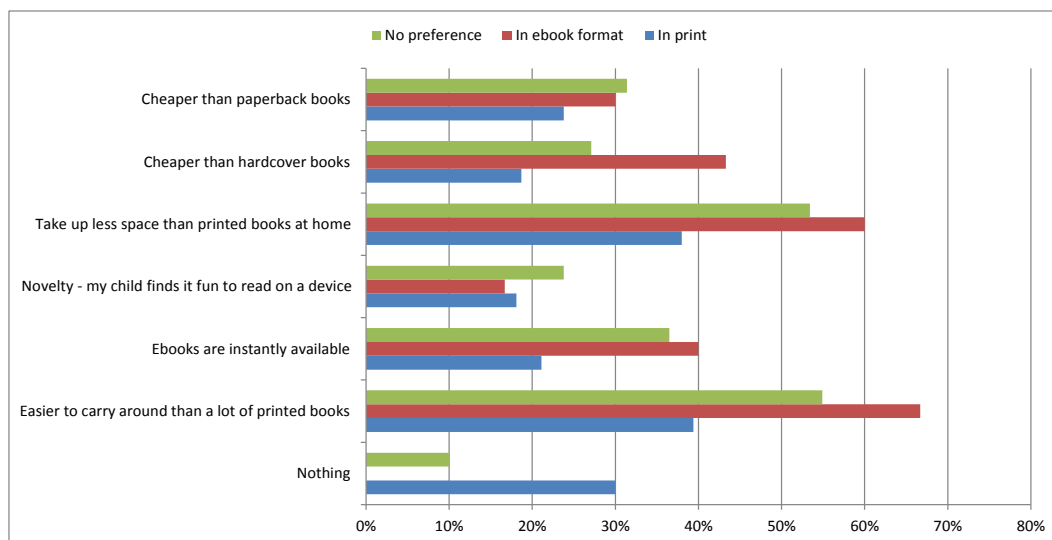
Regardless of their preference for format, parents were asked what features of ebooks they felt were advantages of the format over print books. Breaking these results down by format preference, we see that parents who prefer their children to read in print or ebook format view the advantages and disadvantages of ebooks differently from parents who don't express a preference for format. It should be noted that only a few parents (4%) preferred for their child to read exclusively in ebook format.

Most parents feel that portability is an important advantage ebooks hold over print, as is the fact that ebooks take up less space at home. To a lesser extent, but still significantly, parents agree that the novelty of ebooks (the fun of reading on a device) is a potential consideration for their child.

Price was cited as an advantage more often by parents who preferred ebooks or did not have a format preference for their children. Parents with no preference were more likely to identify price as an advantage over paperback books than hardcovers, though it is a significant factor for both.

Parents who prefer to have their children read in print were the least likely to identify price as an advantage of ebooks.

**ADVANTAGES TO EBOOKS AS COMPARED BY FORMAT PREFERENCE**



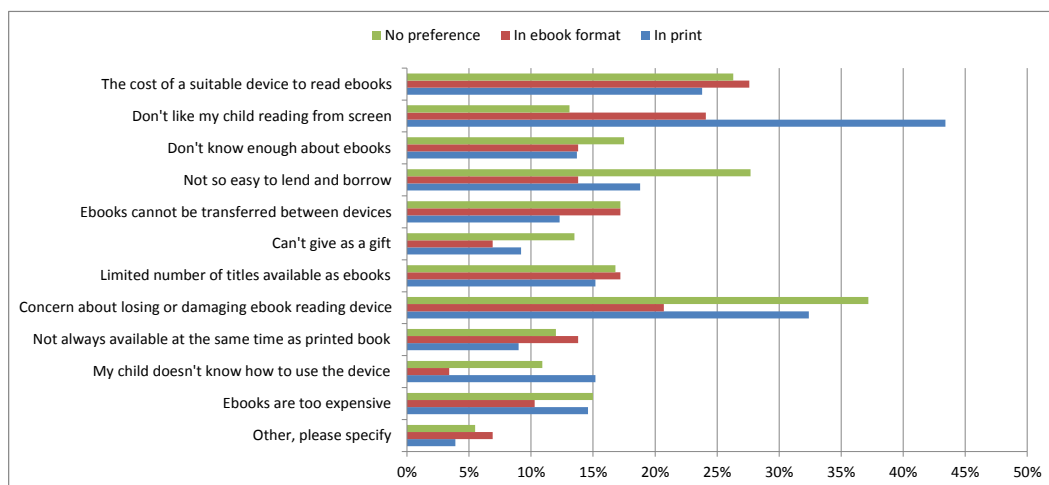
Question: What, if anything, do you think would make ebooks a better platform for children's reading, versus print? Select up to 3  
 Crosstab Question: How would you prefer that they do most of their reading?  
 (N= 820)

Opinions among parents about the major disadvantages of the ebook format also vary depending on their format preferences for their children's reading. Parents who did not express a preference were more likely to identify concerns with the expense of devices (more so than people who prefer print), a child's lack of experience or knowledge about device use, difficulty in lending and concern with their child damaging the device. They were also the least concerned (13%) about their child reading from a screen as compared to parents who prefer print (44%).

Parents who prefer their children to read ebooks were considerably less concerned about damage to ebook readers or whether their child would struggle with device usability. This group was the most concerned about the cost of devices.

Parents who prefer print felt very strongly that they did not want their child reading from a screen, and were concerned about device damage, device usability and cost.

### BARRIERS TO EBOOKS AS COMPARED BY FORMAT PREFERENCE



Question: What do you think are the barriers or obstacles to children doing more of their reading on ebooks, versus print?

Crosstab Question: How would you prefer that they do most of their reading?

(N= 815)

### TEENS: BARRIERS / ADVANTAGES TO EBOOKS

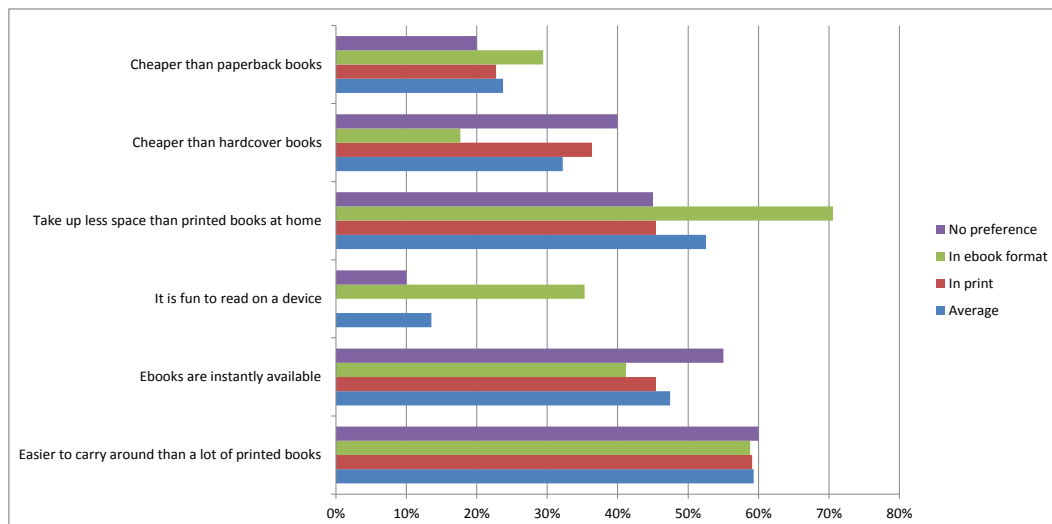
We isolated the 27% of teens who stated that they currently read ebooks and asked them to identify what they liked and disliked about ebooks, cross-tabulating format preference with assessment of advantages and barriers to reading ebooks. Again, we are dealing with a small sample size for this group, but the patterns that emerge are significant enough to be interesting.

Nearly a third of teens state that they have no preference as to which format they read from, which is an interesting group to take a closer look at. For those who claim they have no preference, what are the main points of interest that they feel are advantages and obstacles to reading more ebooks?

Format-agnostic teens are more likely than teens who prefer ebooks or print books to be concerned about price. They are also more likely to identify the fact that ebooks are instantly available as an advantage.

Teens who prefer to do most of their reading in ebook format are much less likely than the average to identify lower price points as an advantage to reading ebooks over print books. For this group, the biggest advantage to ebooks is that they take up less space at home (71%). They are also significantly more likely than the average to think that reading on a device is fun (35%).

**TEENS WITH DIFFERENT FORMAT PREFERENCES IDENTIFY ADVANTAGES TO EBOOKS**



Question: What, if anything, do you think would make ebooks a better platform for reading, versus print? (Select up to 3)  
 Crosstab Question: How would you prefer to do most of your reading?  
 (N= 59 respondents, N= 142 responses)

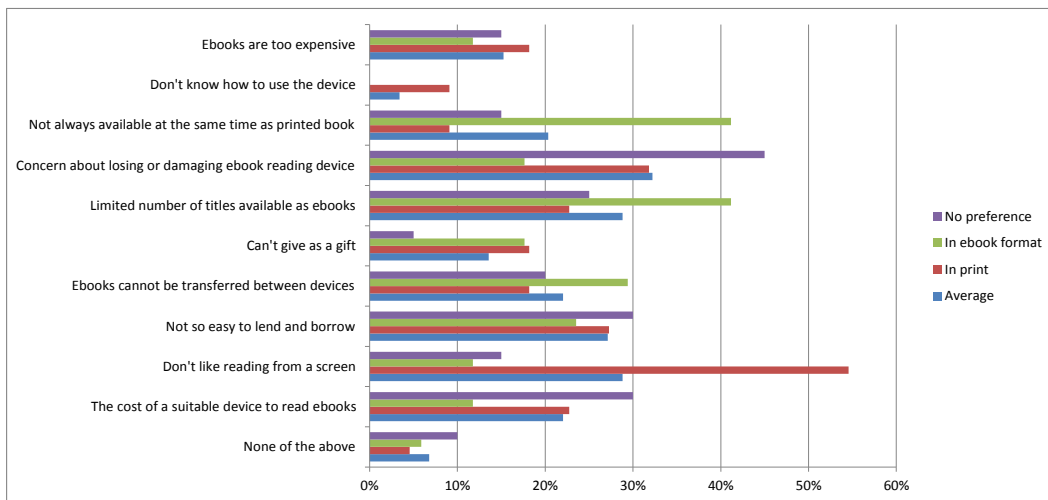
Teens are concerned that titles are often not available digitally at the same time they become available in print

When it comes to identifying barriers to reading ebooks, teens who have no preference or who prefer print are significantly more likely to be concerned with losing or damaging their device(s), and are more likely to be concerned about the cost of ebooks than teens who prefer to read ebooks. The biggest concerns of teens who prefer ebooks are that titles are not always available in ebook format at the same time that they become available in print (41%), and that limited numbers of titles are available as ebooks (41%).

In general, teens who currently read ebooks do not have a specific genre that they prefer to read as an ebook versus a print book. 43% stated that they had no preference whatsoever, while 30% said that they preferred to read fiction titles in ebook format.

While teens prefer to read on tablets, over **40%** think smartphones are good for reading ebooks

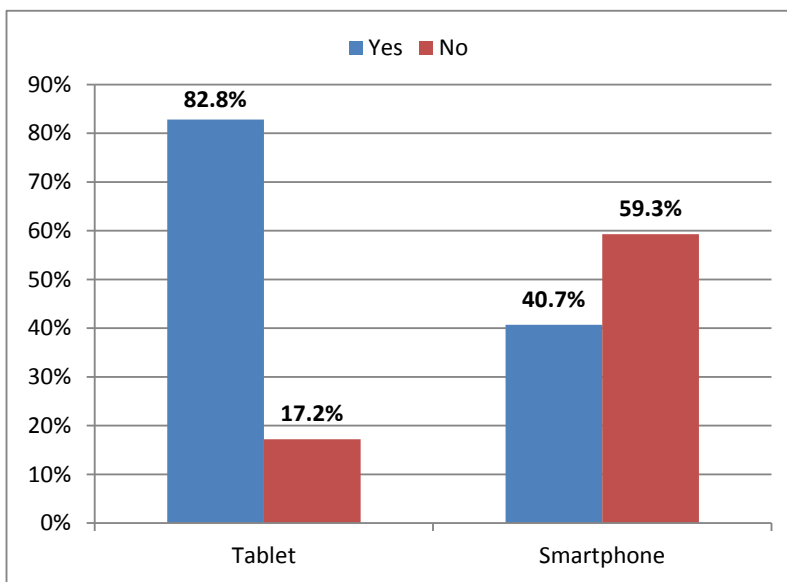
**TEENS WITH DIFFERENT FORMAT PREFERENCES IDENTIFY BARRIERS TO EBOOKS**



Question: What do you think are the barriers or obstacles to doing more of your reading on ebooks, versus print? (Select up to 3 options)  
 Crosstab Question: How would you prefer to do most of your reading?  
 (N= 59 respondents, N= 131 responses)

As we have seen, smartphone adoption among teens is increasing rapidly. With that in mind, we examined how teens felt that smartphones stood up next to tablets as reading devices. What we found was a definite preference among teens for reading on tablets, with 83% responding that tablets are good for reading on, compared to only 17% for smartphones.

**TEEN PREFERENCES FOR E-READING: TABLETS VS. SMARTPHONES**



Question: Do you think a tablet is a good tool for reading ebooks?  
 Question: Do you think a smartphone is a good tool for reading ebooks?  
 (N= 221)

That being said, when asked to identify barriers to reading on these devices, the same top three barriers were mentioned—albeit in a different order. Battery life was identified as a more significant barrier for reading on tablets, while screen size was significantly more of an issue with smartphones.

### TOP 3 BARRIERS TO READING ON A TABLET OR SMARTPHONE

	Tablet	Smartphone
I don't think there are any barriers	33.9%	13.1%
Battery life	30.3%	15.8%
Size of screen	11.8%	57.5%

Question: In your opinion, what do you think is the biggest barrier to reading and exploring ebooks on a tablet? On a smartphone?

(Please select one.)

(N= 221)

It will be interesting to see whether we continue to see an increase in the number of teens reading on their smartphones in the coming years. The U.S. has already seen an increase in e-reading via smartphone, and this phenomenon has taken over most of China.<sup>10</sup>

We know from our own survey that 71% of teens have access to a smartphone, and iPhones and other smartphones were the top two items that teens purchased for themselves. Current data from the Pew Research Center shows that people ages 16–29 are most likely to read ebooks on their cell phones (41%) or computers (55%), as opposed to e-readers (23%) or tablets (16%).<sup>11</sup>

While it would be a mistake to assume that teens in the future will choose to read exclusively on their phones, evidence points to a transition towards teens reading in multiple formats, with smartphones becoming an increasingly acceptable option.

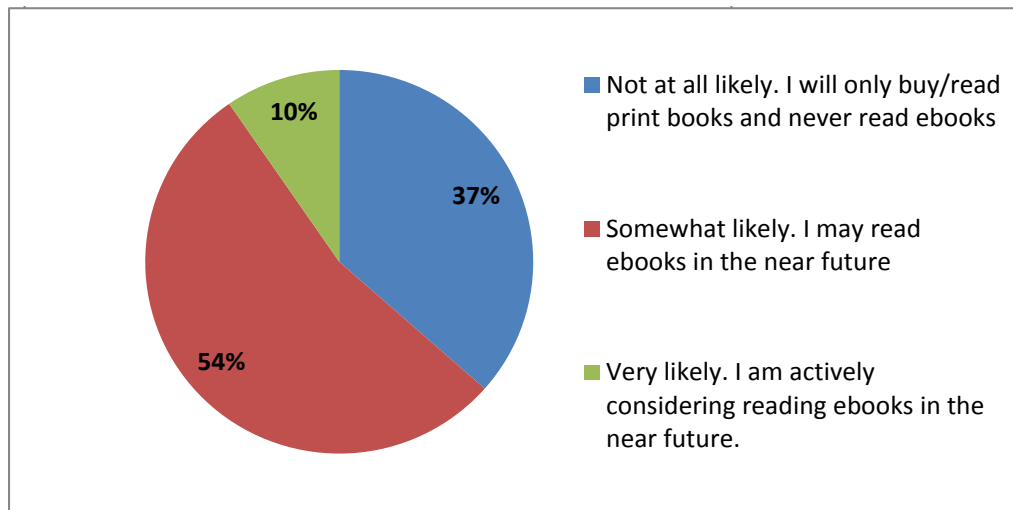
10 Peter Osnos, "In China, 25 Million People Use Only Their Cell Phones to Read Books," *The Atlantic*, November 27, 2012, <http://www.theatlantic.com/technology/archive/2012/11/in-china-25-million-people-use-only-their-cell-phones-to-read-books/265622/>.

11 Kathryn Zickuhr, "Younger Americans' Reading and Library Habits," Pew Research Center, October 23, 2013, <http://libraries.pewinternet.org/2012/10/23/younger-americans-reading-and-library-habits/>

## LOOKING TOWARDS THE FUTURE

We asked parents who do not currently read ebooks to predict their future reading behaviours. The results were fairly mixed, but there does appear to be openness to reading in multiple formats.

### WILL PARENTS WHO DO NOT READ EBOOKS NOW READ THEM IN THE FUTURE?

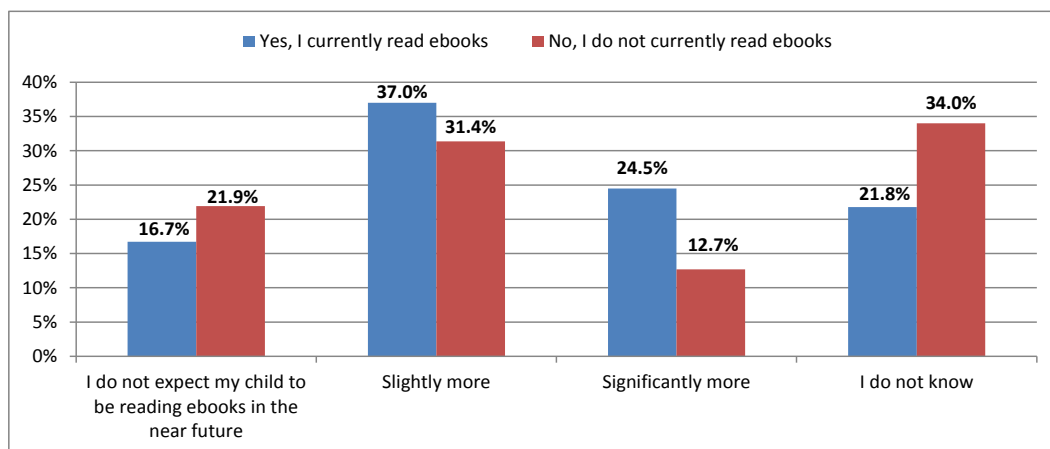


Question: If no, how likely are you to read ebooks in the future?  
(N= 488)

But do parents' predictions for their own future reading habits impact how they think their children will prefer to read in the future?

We found that 25% of parents who currently read ebooks predict that their children will be reading ebooks 'significantly more' in the near future, compared to only 13% of parents who do not read ebooks. Additionally, 37% of parents who read ebooks predict that their child will be reading ebooks 'slightly more' in the near future, which is only slightly higher than parents who don't read ebooks (31%). Parents who do not read ebooks expressed significant uncertainty (34%) over the future reading habits of their children.

PREDICTIONS FROM PARENTS



Question: Do you expect that your child will be reading ebooks more frequently in the near future?

Crosstab Question: Do you currently read ebooks?

(N= 823)

What does this mean for the burgeoning ebook market? Current research points to an increase in children’s ebook publishing: in November 2012, Digital Book World (DBW) reported that sales of children’s ebooks in July 2012 were up 89% from the same period in 2011.<sup>12</sup> The following month, DBW reported that children’s e-publishing was up 50% for the month of August, a decrease from the previous month but still showing healthy year-over-year growth.<sup>13</sup>

Earlier this spring, Kobo Inc. released a white paper study, *The Children’s Digital Book Market: The Future Looks Bright*, that pointed to their own increase in kid’s and children’s ebook sales and stated that they had grown this market by 10 times since 2010.<sup>14</sup>

From our own findings, we see that parents who currently read ebooks are more likely to expect that their children will read ebooks in the near future. We also know that of the 59% of parents who do not currently read ebooks, 10% are actively considering reading ebooks and an additional 54% stated that they ‘may read ebooks in the future.’

12 Jeremy Greenfield, “Children’s Ebooks up 89% in July, Adult up 48%,” Digital Book World, November 1, 2012, <http://www.digitalbookworld.com/2012/childrens-ebooks-up-89-in-july-adult-up-48/>

13 Jeremy Greenfield, “Ebook Growth Continues Slowdown Through August 2012, Children’s up ‘Only’ 50%, Adult 37%,” Digital Book World, December 3, 2012, <http://www.digitalbookworld.com/2012/ebook-growth-continues-slowdown-through-august-2012-childrens-up-only-50-adult-34/>

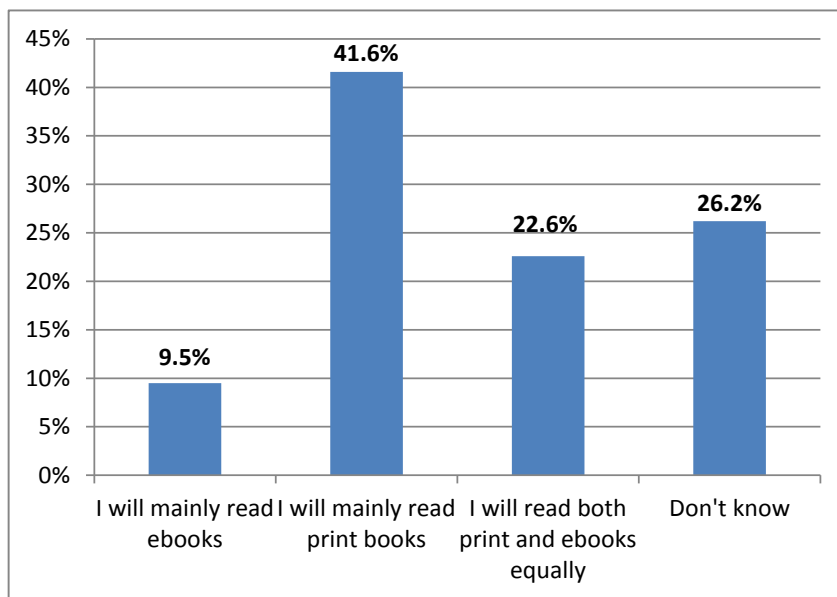
14 Kobo, *The Children’s Digital Book Market: The Future Looks Bright*, April 15, 2013, p. 5.

As more and more adults become accustomed to reading in multiple formats, it stands to reason that their openness to their children reading in multiple formats will likely increase as well.

Among teenagers, we found that print is still the most popular format, with 42% stating that they will still mainly be reading print books over the next year. However, 10% predict that they will mainly be reading ebooks, and another 23% expect to be reading print and ebooks equally.

A year from now,  
**42%**  
of teens think that they  
will still be primarily  
reading print books

**DO TEENS PREDICT THAT THEY WILL READ MORE OR FEWER EBOOKS IN THE FUTURE?**

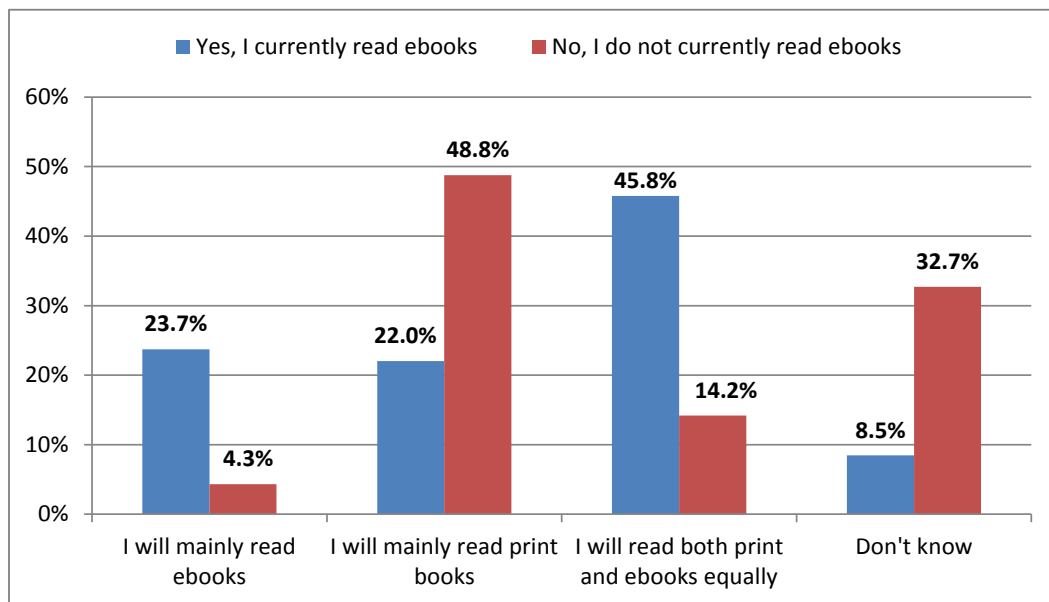


Question: In your opinion, which do you think is more likely in the next year or so?  
(N= 221)

As we saw with parents, when we break the results out further we find distinct differences in predictions between teens who currently read ebooks and those who do not.

46% of teens who read ebooks predict that they will be reading print and ebooks equally in the next year, compared to only 14% of teens who do not currently read ebooks. There is significantly more uncertainty among teens who do not read ebooks (33%) compared to those who do (9%).

**HOW DO TEENS WHO READ EBOOKS DIFFER FROM TEENS WHO DO NOT?**



Question: In your opinion, which do you think is more likely in the next year or so?  
 Crosstab Question: Do you currently read ebooks (on any device or computer)?  
 (N= 221)

Ebook consumption is on the rise, and it appears that parents with young children are taking to e-reading at a significantly higher rate than other adults. And although parents are still clearly reluctant to let their children read off of screens, there seems to be a fair bit of conversion happening here as well.

**51%**  
 of parents predict their children will be reading more ebooks in the near future

On average, for all parents surveyed, predictions leaned towards an increase in ebook consumption by children in the near future: 51% of all parents predict that their children will be reading slightly to significantly more ebooks in the near future. Parents who have already adopted ebooks were significantly more likely to predict increases in their children’s ebook consumption.

About 27% of the teenagers surveyed have read ebooks, and those that have are significantly more likely to state that they think they will read mainly electronically in the future than those who have not (24% vs. 4%). Teens who read ebooks are also more likely to predict that they will be reading both formats equally some time in the next year (46% vs. 14%).

Current market research shows that there has been significant growth in ebook publishing for children and young adults, and our own research leads us to conclude that this trend will continue in the future. But what is also apparent is the staying power of print books. Even parents and teens who currently read ebooks are reluctant to read ebooks exclusively, preferring instead to read both formats equally. And many respondents, particularly teens, have no overall preference for the format they read in.

All of this points to a growing population of hybrid readers who, based on our respondents' top-ranked barriers and advantages to reading in ebook format, will likely base their format choices on availability of titles, convenience and price.

# Apps

## APP AWARENESS

With the advent of ebooks, the very definition of a ‘book’ often comes into question, particularly in the area of children’s publishing. The waters get even muddier when you introduce apps into the discussion: What is the difference between an ebook and an app? Is a digital picture book with a small amount of interactivity an ebook or an app? These are the questions that publishers are asking themselves—but when you put these same questions to parents and teens, will their answers be the same?

In order to maintain consistency, a definition of ebooks and apps was included in the survey. The exact text was as follows:

“Some questions in this survey pertain to ebooks and apps. Ebooks are ‘electronic books’ or ‘digital books.’ They are usually text heavy and do not tend to be extensively interactive. It is very similar to a print book that it is readable on an electronic device and is usually read through e-reader software/devices (i.e., Kindle, Kobo, Sony, Adobe). Apps are an interactive experience, which may be a tool or a game.”

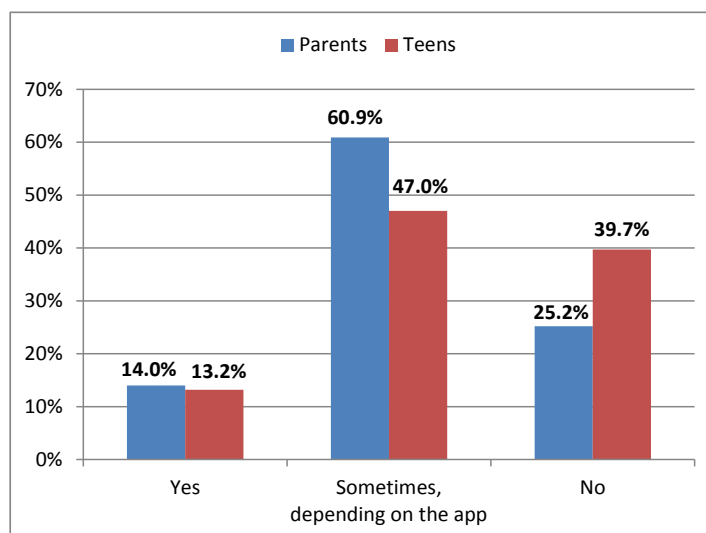
Only 14% of parents and 13% of teens view apps conclusively as a type of reading activity. The majority of parents (61%) and teens (47%) say that it depends on the app itself.

Nearly 40% of teens feel that apps are never a reading activity, compared to 25% of parents. This may have something to do with the types of apps teens are most likely to download, which is discussed in detail later in this section.

**25%**  
of parents and

**40%**  
of teens say apps are  
never a reading activity

### DO PARENTS AND TEENS THINK OF APPS AS A READING ACTIVITY?



Question: Do you think of apps as another kind of reading activity?

(Parents N= 823, Teens N= 151)

### ACCESS TO APPS

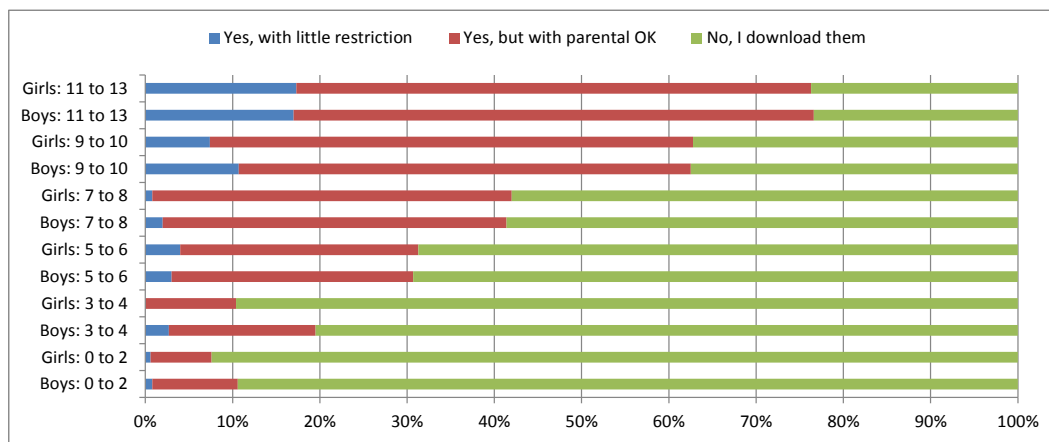
As we saw earlier in the study, children gain access to devices where apps can be downloaded at a very young age. By the age of 3–4, 62% of boys and 61% of girls have access to Apple or Android devices, and by the age of 11–13, 77% of boys and 80% of girls regularly come in contact with devices capable of downloading apps.

The frequency of teens reporting that they have access to Apple or Android devices (68%) is actually less than we see among children aged 11–13 (78%). One possible explanation to this may be one of ownership—teens perceive ‘access’ to mean use of devices they currently own or are able to access regularly, while parents who occasionally share a phone or device with their child may view this as sufficient to constitute access. So it is possible that more teens have certain devices in their household than are reported here, since they are not reporting devices they cannot use on a regular basis.

When children have access to devices, what level of freedom are they granted to download apps of their own accord?

We can see that from ages 0–4, parents are the only ones purchasing and downloading apps to their devices. Around age 5–6 there is a spike in leniency, in which children are allowed to download apps themselves but must ask permission from their parents first. This trend continues until the child is 9–10 years old. By the age of 11, 17% of children are able to download apps to devices with little to no restriction.

### ARE CHILDREN ALLOWED TO DOWNLOAD APPS TO DEVICES?



Question: Are they allowed to download apps to this device?  
(N= 1,420)

Earlier we found that girls had a slight edge over boys in their access to devices. Here it seems that just the opposite has occurred, with girls being slightly more likely than boys to be restricted in their ability to download apps freely or with a parental OK.

### HOW PARENTS FEEL ABOUT APPS

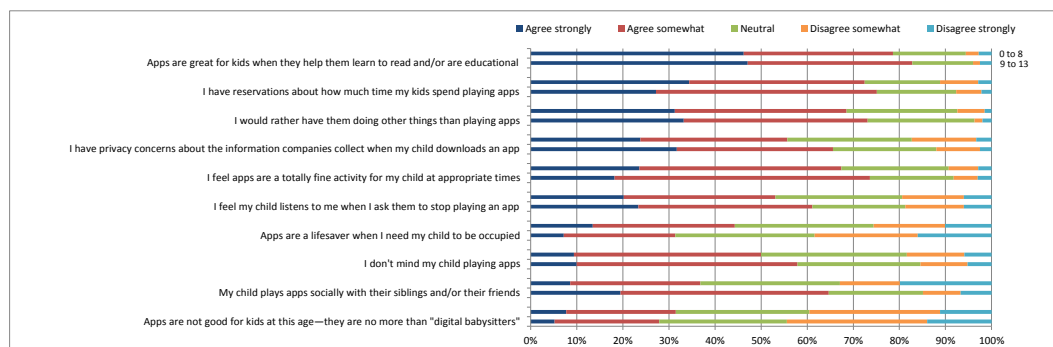
Nearly 50% of parents ‘agree strongly’ that apps have the potential to be beneficial educational tools. However, approximately 30% of parents feel concerned about the amount of time their children spend playing with apps, and would prefer to see them doing something else.

The term ‘digital babysitter’ is often used when parents use devices to distract their children. Yet a large portion of parents disagree with the idea that apps are nothing more than digital babysitters. 44% of parents with children ages 9–13 and 40% of parents with children ages 0–8 ‘somewhat’ to ‘strongly’ disagree with this statement. An additional 28%–29% of parents in each group remain neutral.

Almost  
**50%**  
of parents say apps  
have the potential to be  
educational tools

A notable segment of parents remain neutral to both positive and negative statements about app use, implying that the jury may still be out among parents as to the ultimate value of apps.

### GENERAL ATTITUDES TOWARDS APPS



Question: To what extent do you agree with each of the following regarding app use by kids at younger ages?  
(0 to 8 N= 614, 9 to 13 N= 401)

Earlier we noted that parents who read ebooks are more likely than those who don't to have positive or neutral feelings about their children reading ebooks. Along the same lines, we also found that parents who read ebooks are more likely to have positive feelings about their children playing with apps.

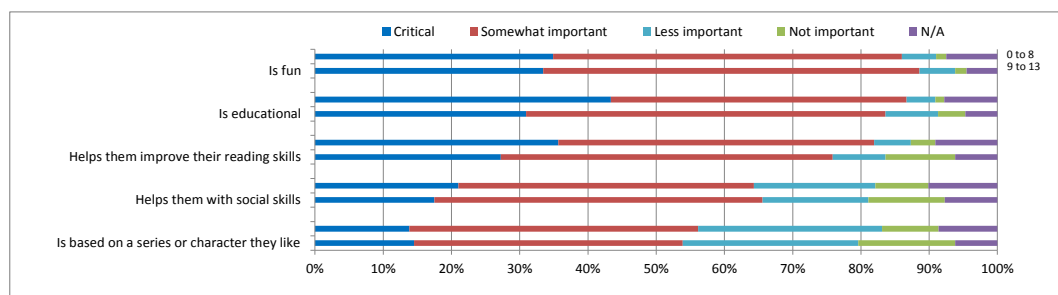
Parents who read ebooks perceive more educational value in apps, feel more strongly that their children are responsive when asked to stop playing with apps, and are more likely to respond that they do not mind their children using or playing with apps.

Parents who do not read ebooks are significantly more likely to feel that their children do not listen to them when they are playing with apps, and are significantly more likely to feel that apps are nothing more than 'digital babysitters' that are inappropriate for children ages 9–13 (33% vs. 21%).

For Children 0-8			
Statement	Level of Agreement	Parents who read Ebooks	Parents who do not read Ebooks
Apps are great for kids when they help them learn to read and/or are educational	somewhat to strongly	87%	73%
I feel apps are a totally fine activity for my child at appropriate times	somewhat to strongly	74%	62%
I feel my child listens to me when I ask them to stop playing an app	somewhat to strongly	62%	46%
For Children 9-13			
Apps are not good for kids at this age—they are no more than “digital babysitters”	somewhat to strongly	21%	33%
Apps are great for kids when they help them learn to read and/or are educational	strongly	53%	43%
I don't mind my child playing apps	somewhat to strongly	70%	50%
I feel my child listens to me when I ask them to stop playing an app	somewhat to strongly	70%	56%

Parents were also asked to identify elements that are important to them in the apps that their children use. Apps that are fun, educational and help to improve reading skills are at the top of the list for parents. Being ‘fun’ was ranked the most important element in an app, with 87% of all parents stating that this factor was ‘critical’ or ‘somewhat important.’ Being ‘educational’ was more important among parents with children in the younger age bracket, with 43% stating that it was a ‘critical’ element, as compared to parents of children in the older bracket (31%).

**CRITICAL ELEMENTS OF APPS – IMPORTANCE OF VARIOUS CRITERIA**

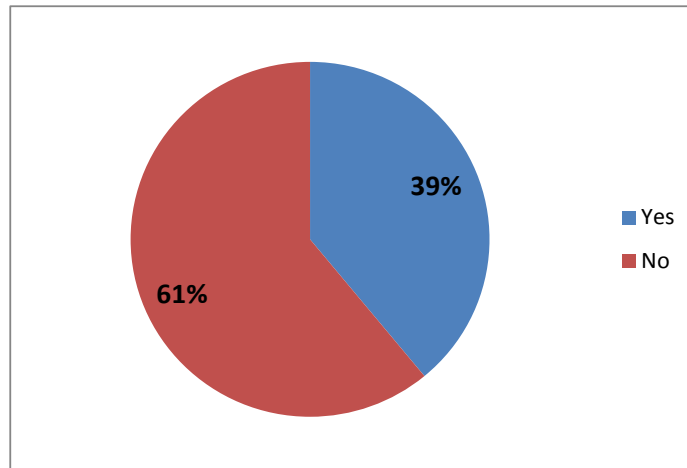


Question: How important is each of the following in an app for your child?  
 (0 to 8 N= 614, 9 to 13 N= 401)

Educational value is continually cited as being of critical importance to parents, particularly parents of younger children, and luckily 61% feel that they are able to locate quality educational apps for their children.

#### DO PARENTS STRUGGLE TO FIND QUALITY EDUCATIONAL APPS?

Most parents are willing to pay more for quality educational apps

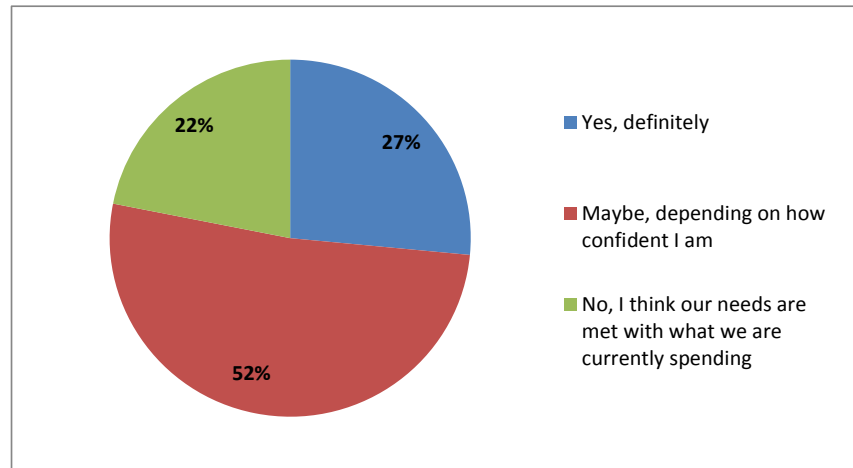


Question: Do you find it difficult to find good educational apps for your children?  
(N= 823)

Most parents are willing to pay more for educational apps—but first you have to prove to them that the app will help their children learn. 27% of all parents would ‘definitely’ pay more, while the majority (52%) need to be convinced of the quality first. Only 22% of parents responded that they would not spend more.

Interestingly, while parents of young children are more likely to flag educational value as a critical element in an app, they are less likely than parents of older children to pay for apps. These findings are discussed further in the study.

**WOULD PARENTS SPEND MORE MONEY ON APPS THAT HELP THEIR CHILDREN LEARN?**



Question: Would you spend more money on apps if you were confident that they were helping your children learn? (N= 823)

In January of 2012 the Joan Ganz Cooney Center published a comprehensive research study that analyzed content in the Education category of Apple’s iTunes App Store. What they found was an incredible surge in the number of apps that target children.<sup>15</sup> In 2011, over 80% of the top-selling paid education apps were geared towards children. Apps for toddlers and preschoolers showed the most growth from 2009, increasing significantly, and ultimately securing 58% of the entire Education category of iTunes.

This study was limited in that it only focused on paid apps sold through iTunes, missing the increasing number of free apps available, as well as the growing market share of Android apps.

15 The Joan Ganz Cooney Center, *iLearn II: An Analysis of the Education Category of Apple’s App Store*, January 2012, p. 13. <http://www.joanganzcooneycenter.org/wp-content/uploads/2012/01/ilearnii.pdf>

## WHERE ARE PARENTS AND TEENS FINDING APPS?

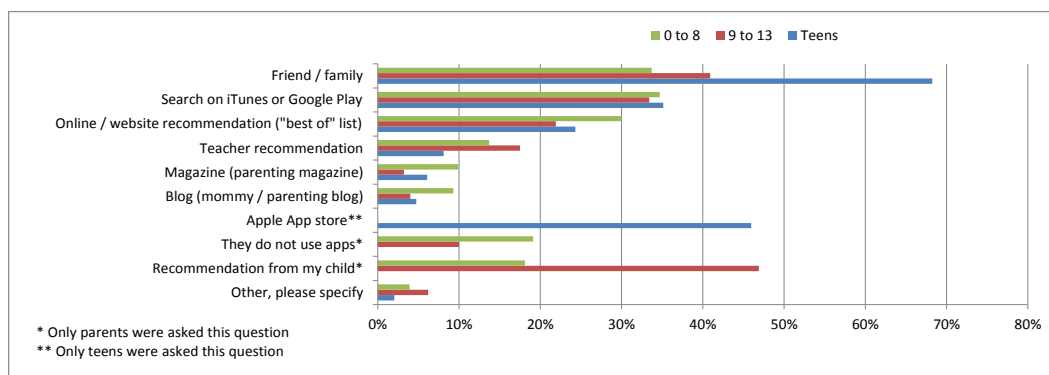
For parents with children younger than 8, the number one source for finding apps is browsing the app stores (35%); this is closely followed by recommendations from family members or friends.

A direct recommendation from their child is a crucial factor for parents with children ages 9–13 (47%), as compared to only 18% of parents with children 8 or younger. Many parents also rely on recommendations from friends and family (41%) and recommendations from teachers (18%).

For teens, app discovery takes a similar route to book discovery. 68% of teens find their next app through a recommendation from a friend or family member, and 46% find their apps by browsing the Apple App Store.

Parents of young children discover apps by browsing app stores

## WHERE PARENTS AND TEENS FIND APPS



Question (Parents): How do you find apps for your children?

Question (Teens): How do you find apps for yourself?

(0 to 8 N= 614, 9 to 13 N= 401, Teens N= 151)

## WHEN ARE APPS USED & WITH WHO?

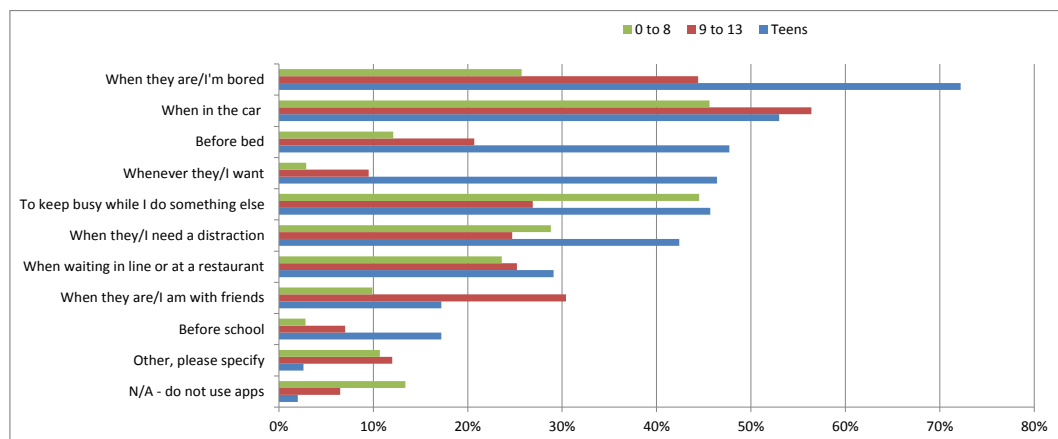
Parents may not admit to viewing apps as ‘digital babysitters,’ but based on when they allow their children to use apps, there may be some truth behind the term. Parents with younger children are most likely to allow their children to use apps when they’re travelling in the car (46%), when they are trying to keep their children busy so they can accomplish other tasks (45%), and when they feel that their child needs a distraction (29%).

For the following graph, parents were asked when they allowed their child to play with apps, and teens were asked in which situations they were most likely to use apps themselves.

Parents with older children tend to follow similar patterns as those with younger children, but in greater percentages. There is a significant increase among children ages 9–13 in using apps socially with friends.

Parents with children in this age group are still reluctant to give up complete control, though, with only 10% of parents stating that they let their children use apps whenever they want. In contrast, 46% of teens stated that they used apps without restriction. Boredom was by far the most likely cause to use apps for teens (72%), followed by ‘when in the car’ (53%), and ‘before bed’ (48%).

## IN WHAT SITUATIONS ARE APPS USED?



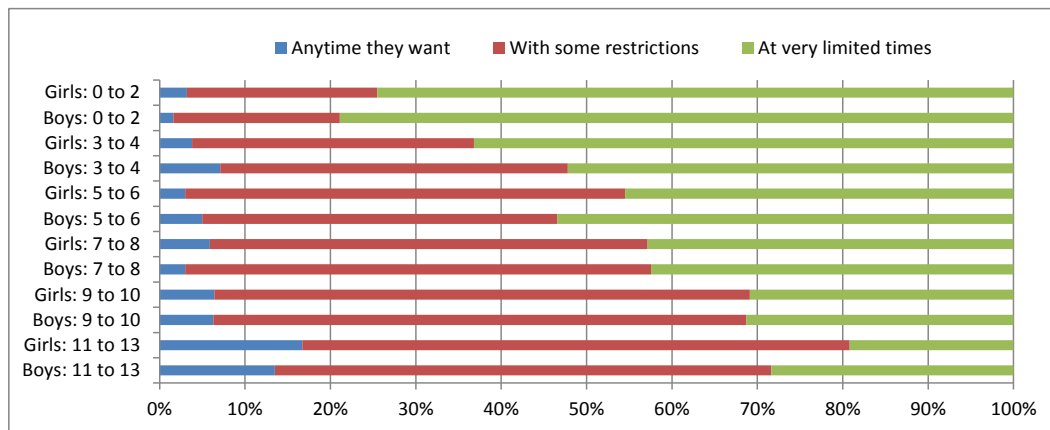
Question (Parents): In what situations do you let your children use apps?

Question (Teens): In what situations do you typically use apps?

(0 to 8 N= 614, 9 to 13 N= 401, Teens N= 151)

Generally, parents with children under the age of 6 are quite restrictive in the amount of time they are willing to let their children play with apps. This seems to shift slightly as children enter the 7–8 and 9–10 age brackets. By the time children enter their tweens (11–13), less than 25% of parents say that they only allow their children to play with apps ‘at very limited times.’

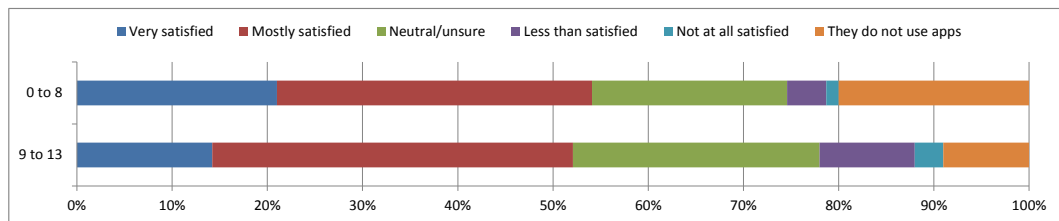
**HOW MUCH DO PARENTS LIMIT TIME SPENT ON APPS?**



Question: In general, when do you let your children play with the apps?  
(N= 1,420)

Overall, parents seem satisfied or neutral about the amount of time their children spend playing with apps. Levels of satisfaction decline slightly as the child becomes older, likely due to the increased amount of unsupervised time that children 9–13 spend playing apps.

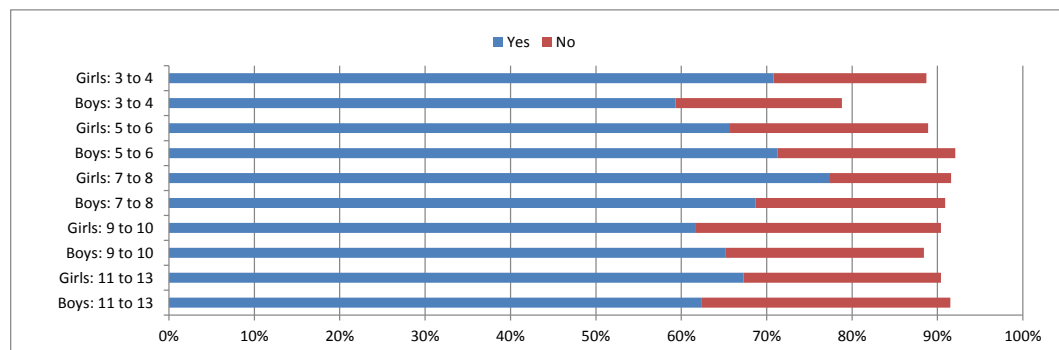
### HOW SATISFIED ARE PARENTS WITH THE AMOUNT OF TIME THEIR CHILDREN SPEND ON APPS?



Question: How satisfied do you feel about the time your children currently spend using apps?  
(0 to 8 N= 614, 9 to 13 N= 401)

Most of the parents surveyed stated that there are regular times during the day when their children read books (in any format) instead of playing with apps. Girls ages 7–8 (77%) are the most likely to have dedicated reading periods during the day, while boys 11–13 and girls 9–10 are least likely (29% each).

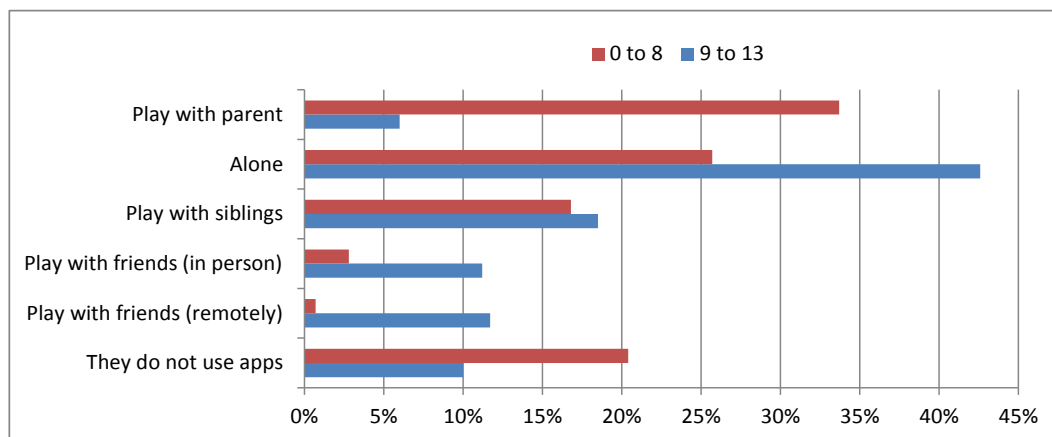
### DO CHILDREN REGULARLY READ INSTEAD OF PLAYING WITH APPS?



Question: Are there regular times in the day when your kids read books (in any format) instead of playing apps?  
(N= 1,420)

Less than 3% of children under the age of 8 play with apps with friends, either in person or remotely. This figure jumps to 11%–12% for children between 9 and 13. Children under the age of 8 spend more time playing apps with a parent than alone, while children 9–13 are significantly more likely to play apps by themselves (43%).

### DO CHILDREN PLAY WITH APPS SOCIALLY OR ALONE?



Question: Do your children most frequently use apps alone or with others?  
 (0 to 8 N= 614, 9 to 13 N= 401)

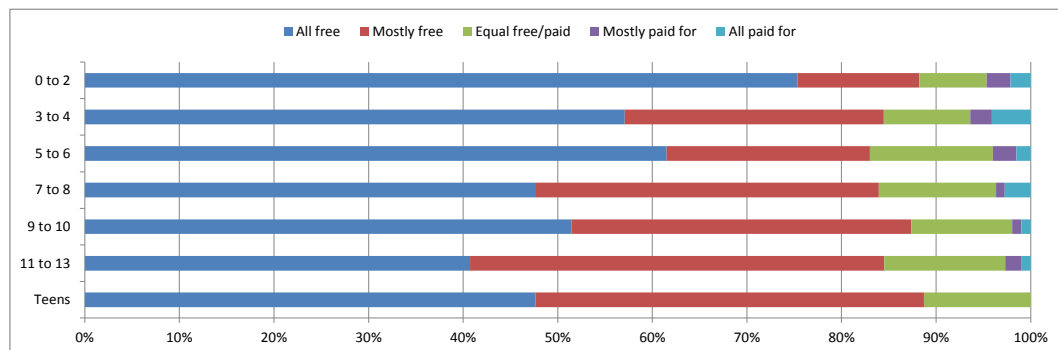
Teens were not asked this question, but we know that only 30% of teens identified ‘when I am with friends’ as a likely occasion to use apps — though this figure could include times when teens are with their friends as well as when they are connecting with friends remotely.

### APP PRICING

Regardless of age, children and teens have collections of downloaded apps that are entirely or mostly free. It appears that the younger a child is, the less likely their parents are to pay for apps, with parents becoming more willing to spend money on apps as their children grow older.

Teens seem especially wary of paying for apps, with 89% of teens claiming that all or most of their apps were downloaded at no cost.

### ARE PARENTS AND TEENS PAYING FOR THEIR DOWNLOADS?

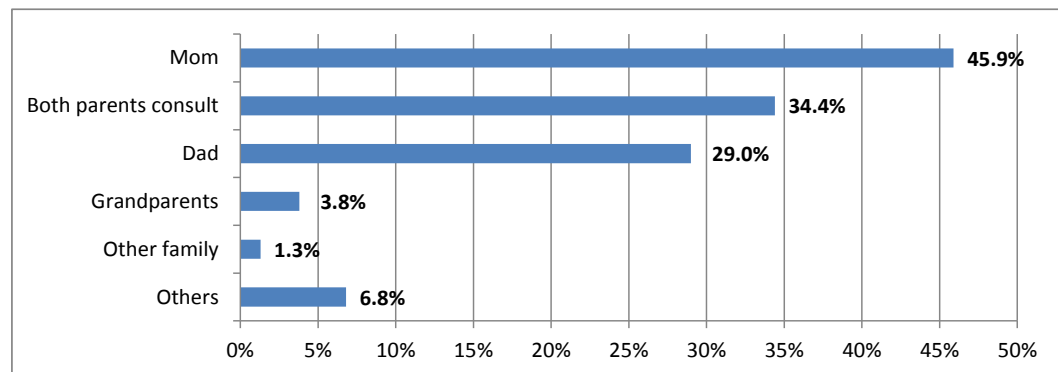


Question: Of these (apps), approximately what percentages were...  
(0 to 8 N= 917, 9 to 13 N= 503, Teens N= 151)

When apps are paid for, 46% of the time the child’s mother is the one making the purchase. Fathers kick in for 29% of purchases, while 34% of purchase decisions are made by both parents together.

### WHEN AN APP HAS A COST, WHO PAYS?

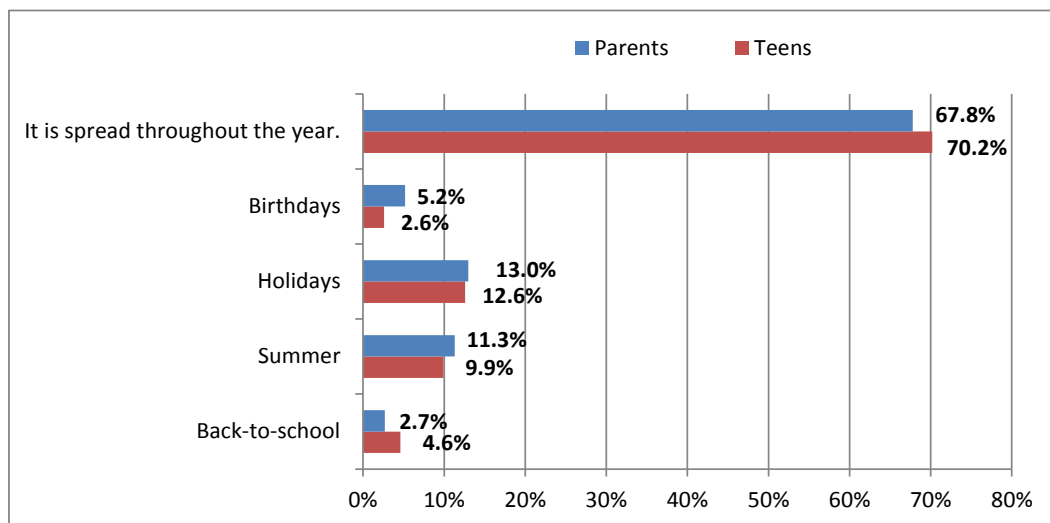
Both parents and teens are more likely to buy apps during holidays and summer months



Question: When an app for a child has a cost, who purchases the app?  
(N= 823)

Most parents and teens spread their app purchases over the course of the year, though around 10% of both groups reported being more likely to purchase apps during the holidays and summer months. Since, as we saw earlier, boredom and the need for distraction are powerful factors in app usage, it makes sense that school vacations would see higher rates of app purchases.

**ARE THERE CYCLES TO PURCHASING APPS?**



Question: Are there particular times of the year that you are more likely to purchase/download apps than others?  
 (Parents N= 823, Teens N= 151)

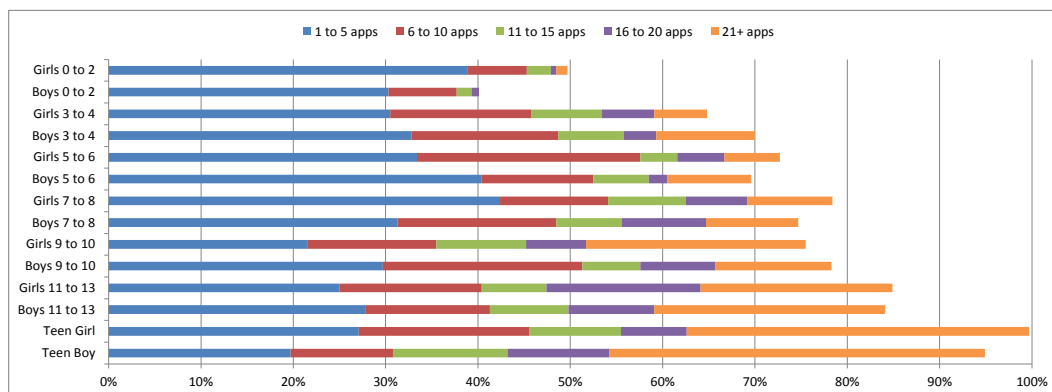
**NUMBER OF APPS ACQUIRED AND DELETED**

In 2012, Nielsen reported that the average adult in the U.S. had 41 apps downloaded to their smartphone, up from 32 in 2011.<sup>16</sup>

For the following analysis, parents were asked how many apps dedicated to their children were on their devices, and teens were asked how many apps they had on their devices. The trend that emerges is that the older a child is, the more apps they are likely to have.

16 Nielsen, "State of the Appnation – A Year of Change and Growth in U.S. Smartphones," May 16, 2012, <http://www.nielsen.com/us/en/newswire/2012/state-of-the-appnation-%C3%A2%C2%80%C2%93-a-year-of-change-and-growth-in-u-s-smartphones.html>

### HOW MANY APPS DO USERS CURRENTLY HAVE?



Question (Parents): How many apps does your child have on this device (even if downloaded by the parent)?

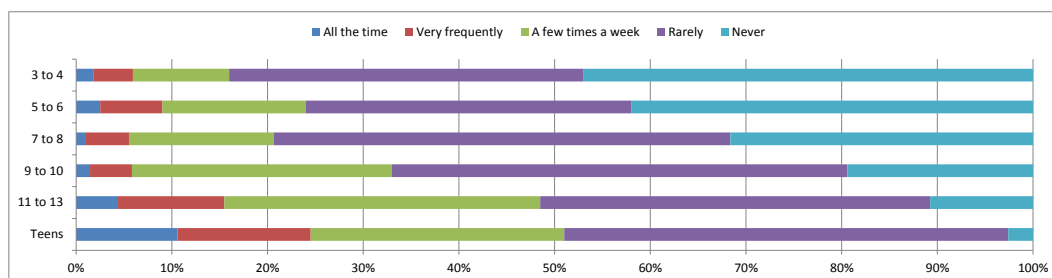
Question (Teens): How many apps do you have on this device?

Crosstab Question (Teens): What is your gender?

(0 to 8 N= 909, 9 to 13 N= 500, Teens N= 151)

25% of teens surveyed say they download apps ‘all the time’ to ‘very frequently,’ and another 27% said that they download apps ‘a few times a week.’ By the time children reach the age of 11–13, their downloading behaviours closely mimic those of teenagers, with 33% of parents responding that their children downloaded apps ‘a few times a week.’

### HOW OFTEN ARE APPS DOWNLOADED?



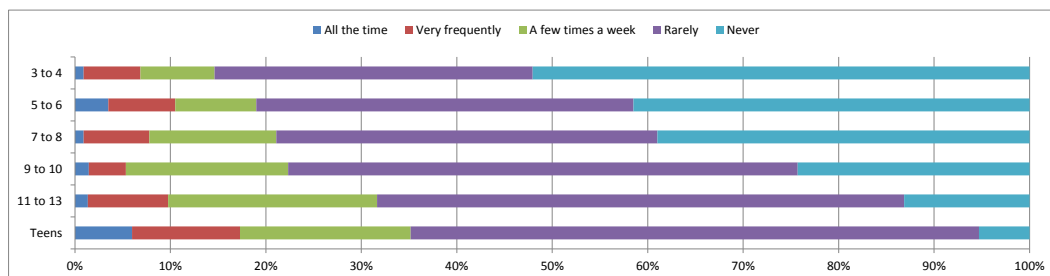
Question (Parents): How frequently do your children download apps?

Question (Teens): How frequently do you download apps?

(0 to 8 N= 917, 9 to 13 N= 503, Teens N= 151)

As children grow up and acquire apps at a faster rate, they also abandon or delete apps more quickly, though not nearly as often as they download them.

### HOW OFTEN ARE APPS DELETED?



Question (Parents): How frequently do your children delete/abandon apps?

Question (Teens): How frequently do you delete apps?

(0 to 8 N= 917, 9 to 13 N= 503, Teens N= 151)

### TYPES OF APPS

Usage of book-related apps steadily declines as age increases

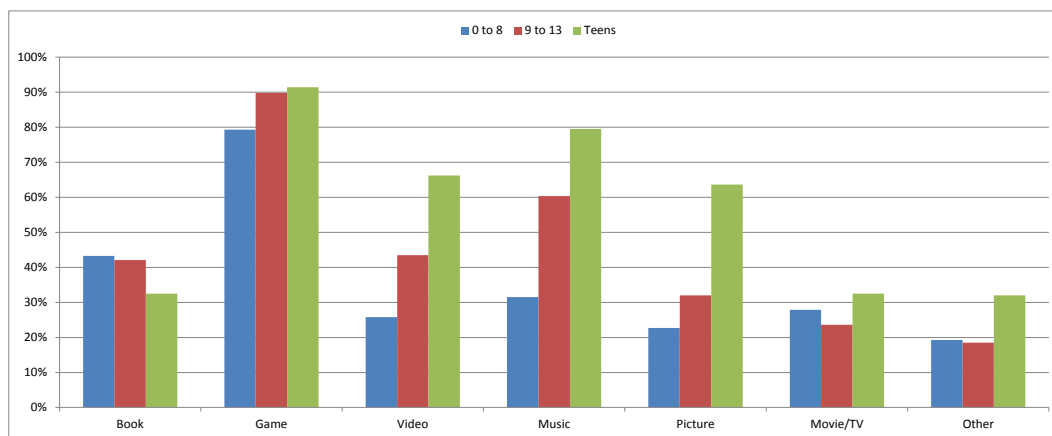
Apps tend to fall into a number of broad categories. To get a sense of which types of apps are most popular, we asked parents to categorize the apps their children use, and asked teens to categorize the apps they had downloaded to their devices.

For both children and teens, game apps are by far the most popular type, appearing on almost 80% of devices used by 0–8-year-olds and reaching over 90% for teens. In fact, almost every type of app appears on more devices as age increases, including video, music, and picture apps. Movie/TV apps experience a dip between ages 0–8 and 9–13, but their use picks up again for teens.

The one exception to this pattern is with book-related apps, whose usage steadily declines as age increases. 43% of children ages 0–8 and 42% of children ages 9–13 have book apps on devices that they have access to; this percentage drops to only 33% among the teens surveyed.

The following graph displays the percentage of respondents who answered that they had a specific type of app on their device. The question posed to respondents asked them to estimate the percentage of apps on their devices that corresponded with different types of apps. This graph is a bundled representation that reflects the percentage of respondents who answered that they had a specific type of app on their device.

**HOW POPULAR ARE DIFFERENT TYPES OF APPS WITH DIFFERENT AGE GROUPS?**



Question (Parents): What percent of the apps that your kids download are...?

Question (Teens): What percent of the apps that you have are...?

(0 to 8 N= 611, 9 to 13 N= 397, Teens N= 151)

As the worlds of ebooks and apps continue to overlap, lines are becoming blurred between the two types of content, and this is particularly true for children’s ebooks. Image-based ebooks, with limited text and interactive elements, could be defined as either an ebook or an app in the eyes of a parent.

This distinction becomes increasingly important for publishers as they navigate the world of app development for children and make merchandising decisions regarding ebooks, such as whether an ebook should be placed in the iBookstore or the App Store.

# Online Activity – Parents & Children

Parents anticipate they will engage online with publishers, authors and books more often in the future

Online marketing is quickly becoming a key component of how readers discover books. Before we delve into how children experience the online environment, we wanted to see if and how parents are using the internet to interact with publishers, authors and books.

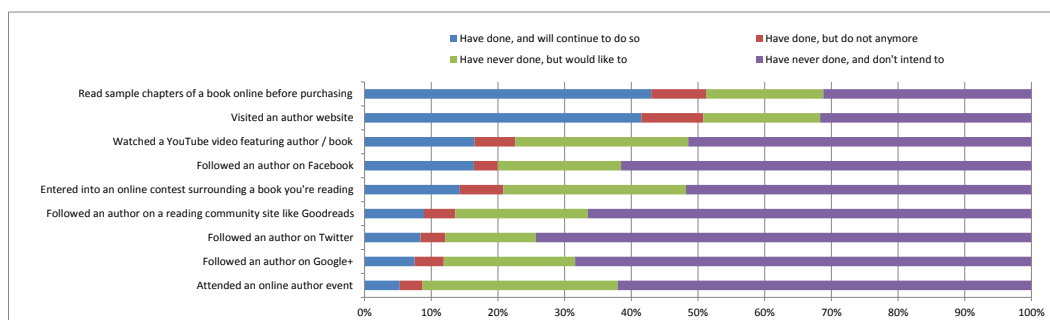
It turns out that parents are big fans of sample chapters! 43% of parents currently read sample chapters online prior to purchasing a book, and an additional 18% would like to do so in the future. This is notably higher than general book buyers for whom only 4% read an excerpt.<sup>17</sup> Parents are also active with authors online. 42% of parents have visited an author's website, 16% have followed an author on Facebook, and 16% have watched a YouTube video featuring an author or a book.

Though the majority of parents with young children have not yet participated in any of the activities listed below, many of them have expressed interest in doing so in the future. 29% of parents are interested in attending an online author event, 27% would like to enter a book-related contest, and 26% would like to watch YouTube videos featuring authors or books.

These results indicate, from a marketing perspective, that the issue isn't convincing people to interact with book-related content online; it's about getting the information in front of the right eyes.

<sup>17</sup> BookNet Canada, *The Canadian Book Consumer 2012: Annual Report*, May 2013, p.70

### HOW DO PARENTS INTERACT WITH AUTHORS AND BOOKS ONLINE?

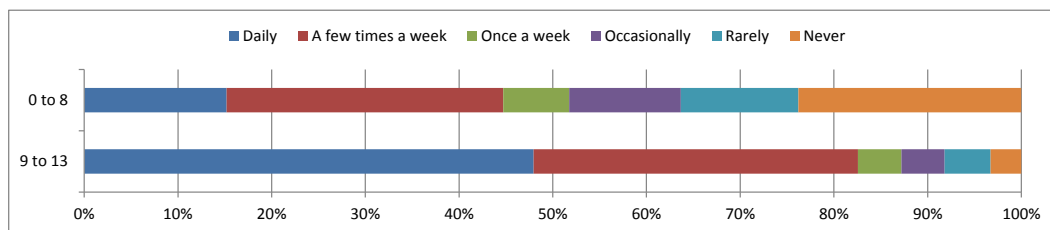


Question: Which of the following have you done or would like to do? (select one response per row).  
(N= 823)

Today's generation of Canadian children are growing up in a connected world. Last year, Ipsos reported that 95% of Canadians under the age of 55 have access to the internet, and 47% can access the internet via their phone.<sup>18</sup> That being said, our current research indicates that just because a child has access to technology does not necessarily mean they have permission from their parents to spend time on it.

We surveyed parents on how much time their children spent online, and broke the results out for children aged 0–8 and 9–13. What we found is that the transition between the two groups is dramatic. Only 15% of children ages 0–8 were identified as daily internet users, compared to 48% of children ages 9–13. By the time a child is 9–13, 83% will access the internet at least a few times each week.

### HOW FREQUENTLY ARE CHILDREN GOING ONLINE?

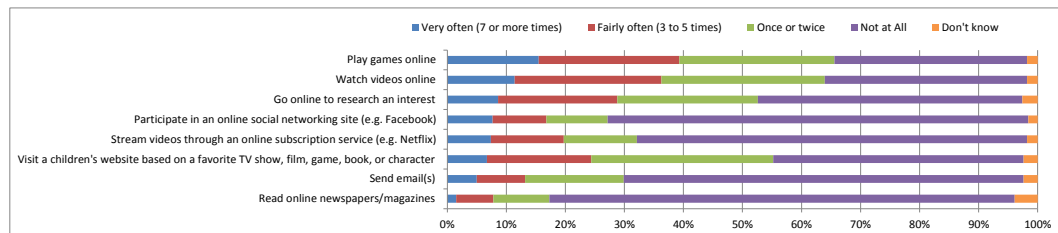


Question: How frequently do your children go online?  
(0 to 8 N=454, 9 to 13 N= 369)

18 Ipsos, *The Ipsos Canadian interactive Reid Report: 2012 Fact Guide, 2012*, p. 2.  
[http://www.ipsos.ca/common/dl/pdf/Ipsos\\_InteractiveReidReport\\_FactGuide\\_2012.pdf](http://www.ipsos.ca/common/dl/pdf/Ipsos_InteractiveReidReport_FactGuide_2012.pdf)

When it comes to participating in activities online, playing games and watching videos are the top choices for children under 13. A significant portion of these children (39%) play games online 3 or more times each week, and 36% watch videos online this often. 49% of children will visit websites based on favoured TV shows, games, or characters between 1 to 5 times per week.

### WHICH ONLINE ACTIVITIES ARE CHILDREN PARTICIPATING IN THE MOST?

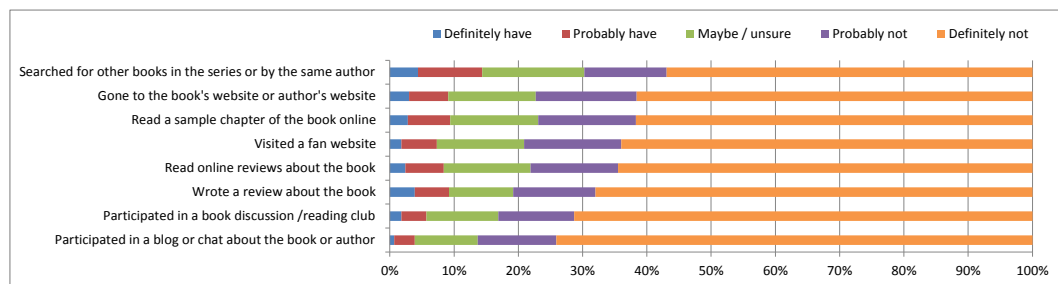


Question: To the best of your knowledge, in the last week, how frequently did your children do each of the following?  
(N= 821)

While it is clear that children are frequently online, it does not appear that they are using the internet to interact with authors or books that they enjoy. Parents were asked to think about the last book their child read and estimate the extent to which they thought their children had done certain related activities online.

For the most part parents felt strongly that their children were not using the internet as a way to interact with books or do book-related activities. Searching for books in the same series or by the same author was the only statement that garnered agreement in more than 10% of parents surveyed.

### DO CHILDREN INTERACT WITH AUTHORS AND BOOKS ONLINE?



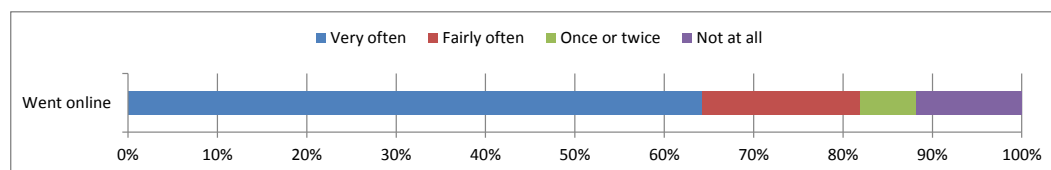
Question: Thinking about the last book your child/children have read, to what extent are you aware that your child/children have recently...?  
Select one response per row.  
(N= 823)

# Online Activity – Teens

## SOCIAL NETWORKS

In the month leading up to the survey, 64% of teens reported going online ‘very often,’ and another 18% accessed the internet ‘fairly often.’ These statistics are not surprising, considering that Canada is ranked the number one country in online engagement.<sup>19</sup>

### HOW OFTEN TEENS WENT ONLINE IN THE LAST MONTH



Question: In the last month, how frequently did you do the following? (Select one response per row)  
(N= 221)

A whopping 93% of teens identified Google as their primary search engine; Yahoo! and Bing each received 3% of the vote. While teens were not asked to identify their primary browser, recent research points to Google Chrome and Mozilla Firefox as likely candidates for teens. In May of 2012, StatCounter revealed that for the first time, Google Chrome had surpassed Internet Explorer as the most widely used internet browser.<sup>20</sup> Internet Explorer continues to be a dominant player in markets such as the U.S. and U.K., but research has shown that Chrome usage increases in the evening, leading experts to conclude that while adults are using Internet Explorer at work, they are switching to Chrome when they come home.<sup>21</sup>

79% of teens access Google on a daily basis, closely followed by Facebook (75%) and YouTube (75%), though Facebook users are more likely to use the network multiple times an hour (22%).

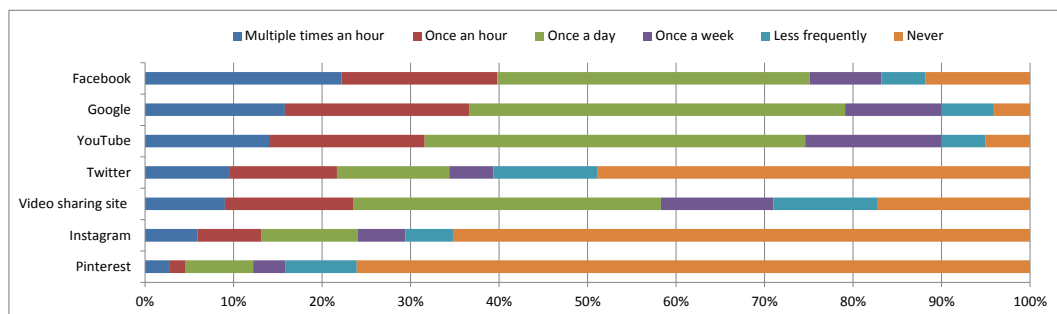
Other social networks mentioned by teens included SnapChat, Tumblr and Stumbleupon.

19 Rebecca Harris, “comScore Calls Canada #1 in Online Engagement,” *Marketing*, March 6, 2013, <http://www.marketingmag.ca/news/media-news/comscore-calls-canada-1-in-online-engagement-73542>

20 Daniel Ionescu, “Google Chrome Overtakes Internet Explorer,” *PC World*, May 21, 2012, [http://www.pcworld.com/article/255886/google\\_chrome\\_overtakes\\_internet\\_explorer.html](http://www.pcworld.com/article/255886/google_chrome_overtakes_internet_explorer.html)

21 Matthew Panzarino, “People in the U.S. and Canada use IE at work but swap to Chrome at home,” *The Next Web*, April 10, 2012, <http://thenextweb.com/microsoft/2012/04/10/people-in-the-u-s-and-canada-use-ie-at-work-but-swap-to-chrome-at-home/>

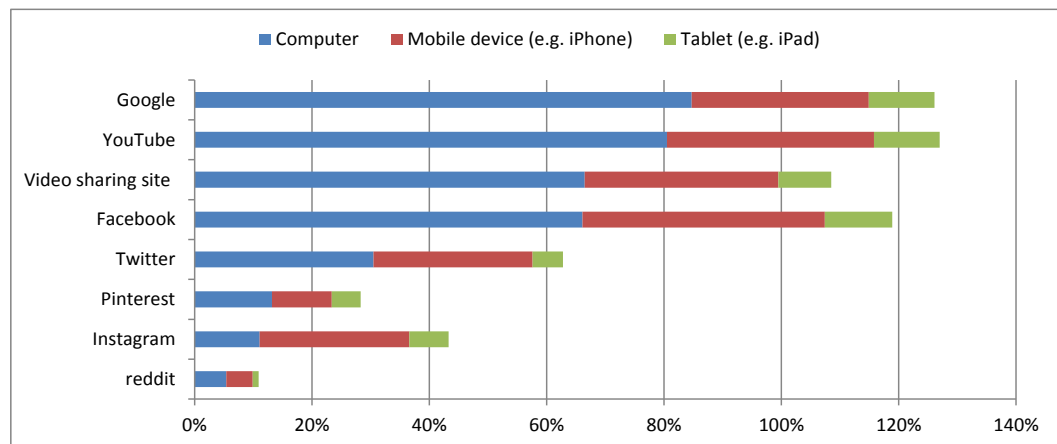
### HOW OFTEN DO TEENS ACCESS SOCIAL NETWORKS?



Question: In the last month, how frequently did you do the following? (Select one response per row)  
(N= 221)

Most teens access their social networks via a desktop or laptop computer, though a significant number use cell phones as their primary devices. 41% of teens who use Facebook are accessing it through their phones. Twitter had an interesting dynamic in that there was very little difference in the percent of teens that access it via their phone (27%) as opposed to their computer (31%).

### WHICH DEVICES DO TEENS USE TO ACCESS SOCIAL NETWORKS?



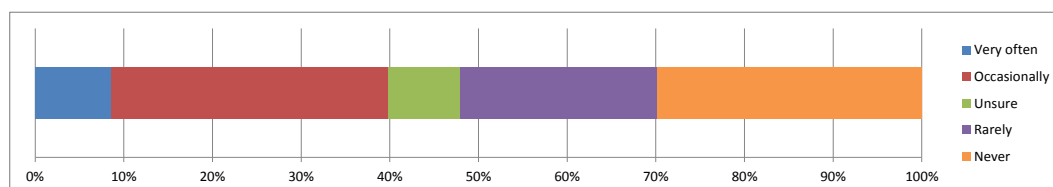
Question: What are the primary ways you access these networks? (Select no more than 2 responses per row)  
(N= 202-218)

## ENGAGEMENT

Facebook’s success is particularly strong amongst teenagers. According to PEW research, 81% of all teens in the U.S. utilize social media networks, and of those who do, 94% of them use Facebook.<sup>22</sup>

While many businesses have opted to create social media presences for themselves, are they able to connect and engage with teens? 40% of teens surveyed stated that they ‘liked’ brands and series on Facebook ‘occasionally’ or ‘very often.’

### HOW OFTEN DO TEENS ‘LIKE’ BRANDS OR SERIES ON FACEBOOK?



Question: How often do you ‘like’ or follow a particular brand or series on Facebook?  
(N= 221)

**12%**  
of teens follow authors,  
brands or series  
on Twitter

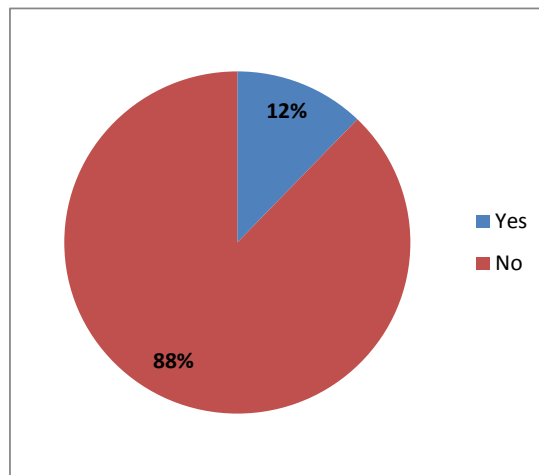
Unsurprisingly, only 12% of the teens surveyed said they followed authors, brands or series on Twitter. The very nature of Twitter promotes conversation between people, making it difficult for companies and brands to gain the same kind of traction that a person or celebrity might receive.

Very few authors seem to have broken through the Twitter ceiling. J.K. Rowling has over 2.3 million followers, but has only tweeted 21 times since 2009. Even E.L. James, whose books have sold over 65 million copies world wide<sup>23</sup>, only has around 325,000 followers as of this writing, even though she engages far more on the platform than Rowling does.

22 Greg Sterling, “Pew: 94% of Teenagers Use Facebook, Have 425 Facebook Friends, But Twitter & Instagram Adoption Way Up,” Marketing Land, May 21, 2013, <http://marketingland.com/pew-the-average-teenager-has-425-4-facebook-friends-44847>

23 Laura Hazard Owen, “With release in hardcover, *50 Shades* completely flips traditional publishing cycle,” January 10, 2013, <http://paidcontent.org/2013/01/10/with-release-in-hardcover-50-shades-completely-flips-traditional-publishing-cycle/>

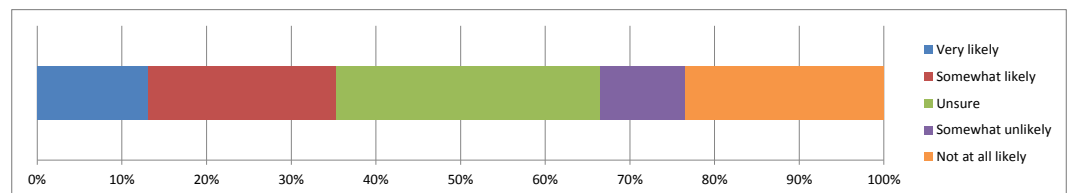
### DO TEENS FOLLOW AUTHORS, BRANDS OR SERIES ON TWITTER?



Question: Have you ever followed an author, brand or series on Twitter?  
(N= 221)

35% of teens said they were ‘somewhat’ or ‘very’ likely to extend their engagement with brands from one social networking platform to another, while 34% stated they were ‘somewhat unlikely’ to ‘not at all likely’ to do so and 31% were unsure. This points to the importance of maintaining a consistent voice and brand image across platforms, while at the same time identifying your primary social network and focusing on building your brand there, as opposed to spreading resources too thin across multiple platforms.

### DO SOCIAL NETWORK INTERACTIONS EXTEND ACROSS PLATFORMS?

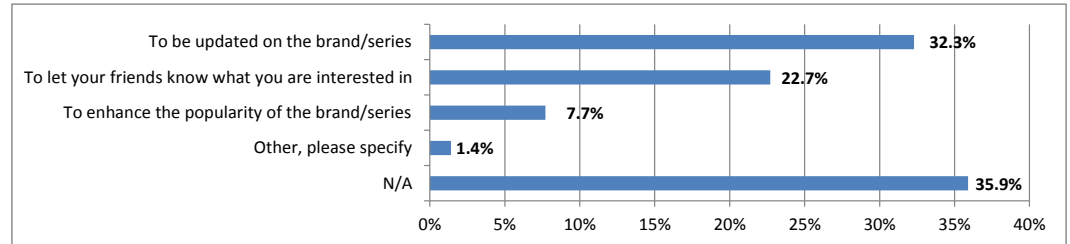


Question: If you like a brand, series, or author, how inclined are you to follow it across different platforms?  
(I.e. Facebook, Twitter, YouTube, RSS feed, etc.)  
(N= 221)

**32%**  
of teens “like” or follow brands/series because they want to see updates

A huge plus for brands and series is that 32% of teens stated that their primary motivation for ‘liking’ or following is because they wish to be updated with current news for the brand/series. An additional 23% actively engage with brands to let their friends know what they’re interested in. In open-ended responses, many teens cited contests as a motivating factor in social engagement.

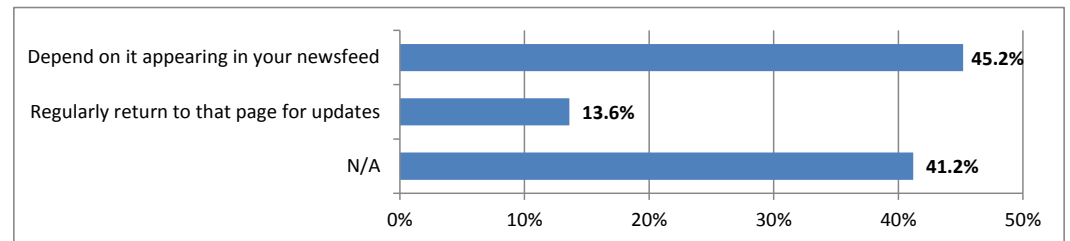
**WHAT MOTIVATES TEENS TO ‘LIKE’ OR FOLLOW BRANDS AND SERIES?**



Question: When you do ‘like’ or follow a particular brand or series, what is your primary motive for doing so?  
(N= 220)

‘Likes’ and follows are only the beginning of a social media relationship. The key to maintaining the relationship is communication; but how often do teens continue to engage with brands after initial contact? According to our research, only 14% of teens regularly return to branded pages for updates, while 45% said they relied on items appearing in their newsfeed.

**AFTER TEENS ‘LIKE’ OR FOLLOW, DO THEY CONTINUE TO ENGAGE?**

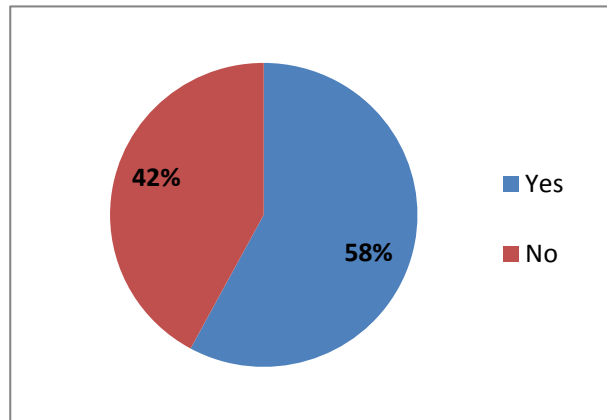


Question: Once you ‘like’ or begin to follow a particular brand or series on Facebook, do you...?  
(N= 221)

A post in a newsfeed increases the odds that a teen will try to find out more about a book

Seeing a post in their newsfeed showing that a family member or friend has ‘liked’ or recommended a book seems to significantly increase the odds that a teen will try to find out more about it. Knowing this, it is important for book marketers to identify who the ‘influencers’ are in their audiences and find ways to effectively engage with them in an effort to increase sharing.

#### DO RECOMMENDATIONS FROM FAMILY & FRIENDS HELP?



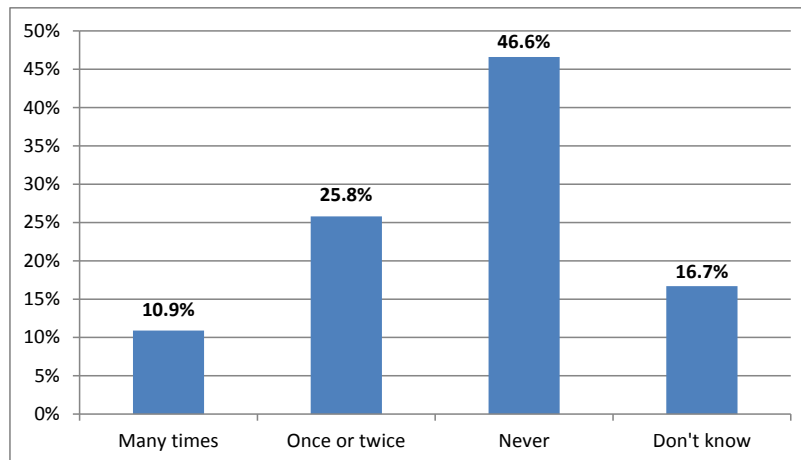
Question: If you see that a close friend or family member has ‘liked’ or recommended a book on your newsfeed, are you more likely to check it out?  
(N= 221)

#### TEENS & ONLINE ADVERTISEMENTS

Facebook advertisements provide useful tools to narrow down potential audiences so that marketing efforts are targeted and effective. But even if teens are being targeted with suitable ads through Facebook, are they likely to click through and explore the link?

When asked how often they click through advertisements on Facebook, 47% of teens said ‘never.’ 26% said they had done so ‘once or twice,’ and even fewer stated they had done so ‘many times’ (11%).

### DO TEENS RESPOND TO FACEBOOK ADVERTISEMENTS?



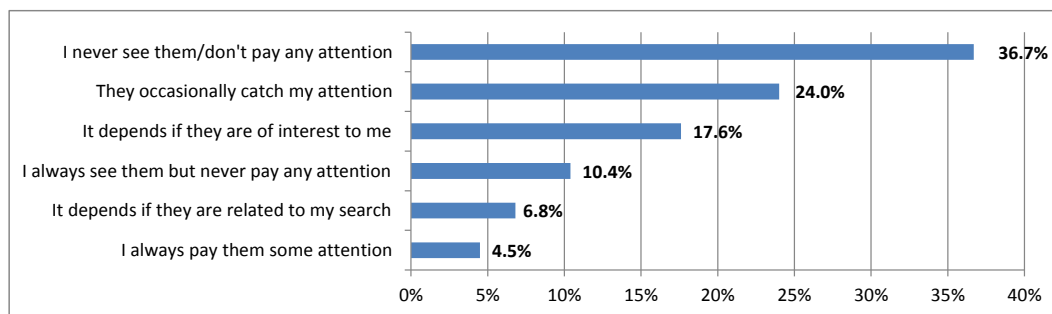
Question: How often have you clicked through an "Ad" on Facebook?  
(N= 221)

These results for Facebook might be due to the fact that teens are mainly engaging in social activities when they are using this site. Are they more likely, then, to respond to targeted advertisements that appear when they are searching the internet?

37% of teens claim to never see advertisements or pay them any attention; additionally, 52% of teens say they are 'not at all likely' to click through a sponsored advertisement. There is some hope for internet advertisers, though: 24% of teens 'occasionally' notice sponsored advertisements on search pages, and 5% say that they 'always' do.

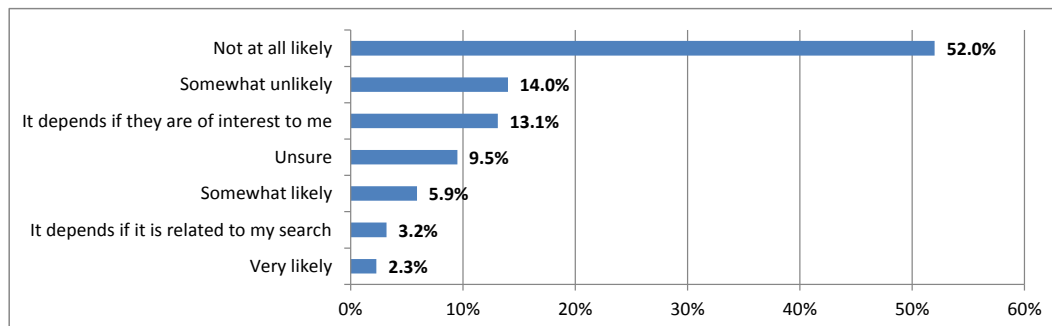
Interestingly, only 3% of teens stated relativity to search as a trigger to click on an ad, while 13% said that it depends on whether they are interested in the ad itself. Generally, the consensus (76%) is that teens are only 'somewhat' to 'not at all' likely to check out a sponsored ad.

### DO TEENS PAY ATTENTION TO SPONSORED ADVERTISEMENTS ON SEARCH PAGES?



Question: How much attention do you pay to sponsored advertisements on a search page?  
(N= 221)

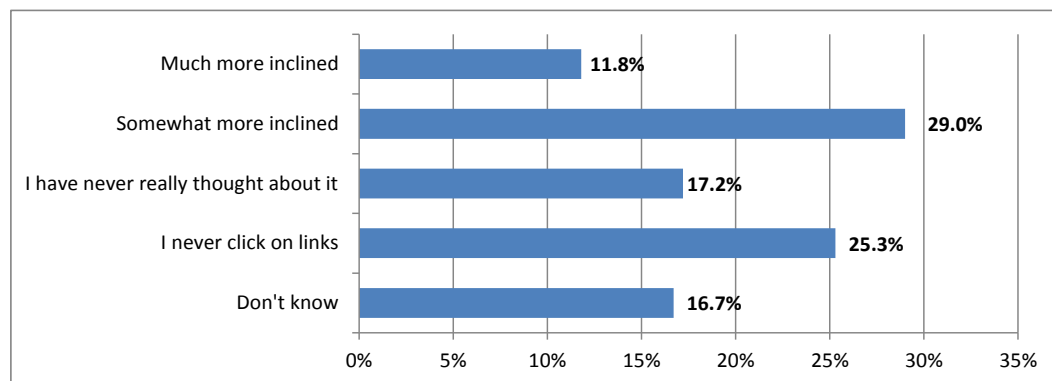
### WILL THEY CLICK THROUGH A SPONSORED ADVERTISEMENT?



Question: How likely are you to click on a sponsored advertisement?  
(N= 221)

Teens expressed slightly more enthusiasm for ads tailored to their personal tastes: 29% said they are 'somewhat' more inclined to click through these ads, and an additional 12% are significantly more inclined to do so.

### WHEN ADVERTISEMENTS ARE PERSONALIZED, ARE TEENS MORE LIKELY TO CLICK THROUGH?



Question: How inclined are you to explore a link/advertisement if it claims to be based on your own personal taste?  
(N= 221)

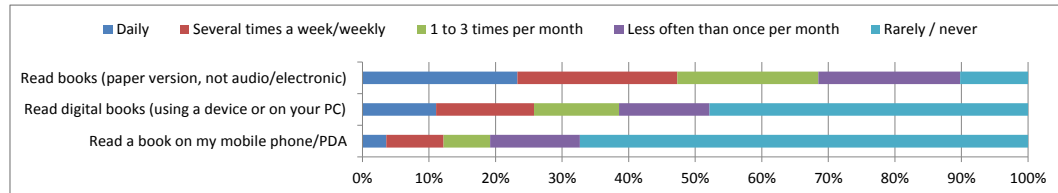
# Reading Habits & Attitudes

Many research studies argue that providing a proper home environment is integral in encouraging children to become readers. Providing access to books, creating an encouraging atmosphere, and having children see their parents reading are significant factors.<sup>24</sup>

To assess how much parents are reading at home, we asked them to rate their reading habits over a variety of formats. Reading in print was by far the most popular, with 47% of parents stating that they read daily or several times a week, while 26% of parents responded that they read digitally on a daily to weekly basis.

## HOW MUCH DO PARENTS READ

### HOW OFTEN DO PARENTS READ BOOKS?



Question: How often do you engage in the following activities? Select one for each.  
(N= 810 – 821)

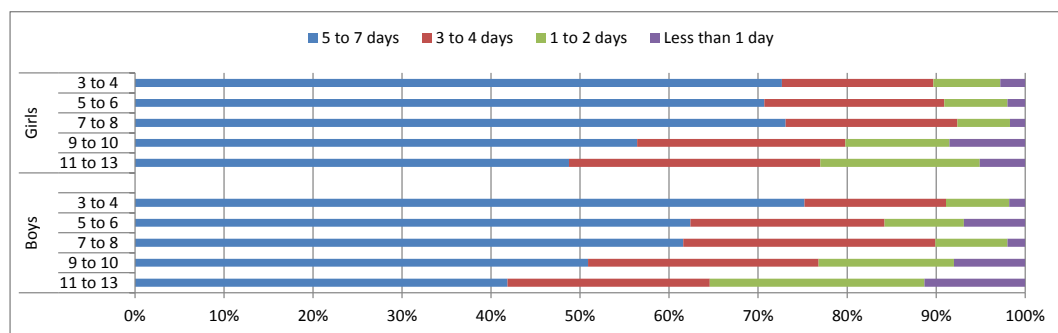
For the most part, it seems that children still spend quite a bit of time reading for fun. Differences in gender are apparent from the start, as girls tend to maintain a steady reading level of 5 to 7 days per week until this drops off sharply around 8 years of age. Time spent reading decreases again for girls aged 11–13, though this drop is less significant.

24 Sharon Murphy, *Towards Sustaining and Encouraging Reading in Canadian Society*, April 2013, p. 34. <http://nationalreadingcampaign.ca/test/wp-content/uploads/2012/10/TowardsSustainingAndEncouragingReading.pdf>.

Boys' reading levels, in contrast, drop off dramatically for the first time after ages 3–4, then remain level until 9–10 years of age, at which point they decline rapidly all the way to their teen years.

## HOW MUCH DO CHILDREN READ

### HOW MANY DAYS PER WEEK DO CHILDREN READ BOOKS FOR FUN?



Question: For your child in each category, please indicate HOW MANY DAYS A WEEK he or she reads books for fun (or you read for your child). If you don't know for sure, please estimate. (If you have more than one child in this category, please answer for just one). (N= 94–156)

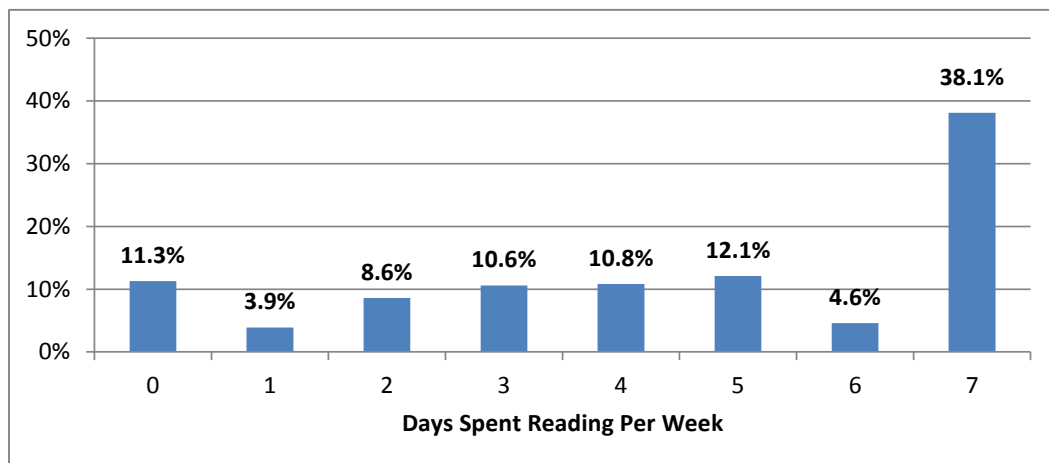
**38%**  
of parents read with their children ages 0–8 every day

Up until children are able to read on their own, they are read to or read with. To get a sense of how often these activities occur at home, we surveyed parents with children ages 8 years or younger and asked them how many days in a week their child is read to or read with for fun.

38% of parents responded that they read with their child every day; apart from this concentration, the remaining parents are spread quite evenly, though a higher than expected percentage of parents responded that they did not read with their children at all (11%).

## DO PARENTS READ TO THEIR CHILDREN? IF SO, HOW FREQUENTLY

### HOW FREQUENTLY DO ADULTS READ TO THEIR CHILDREN AGES 0–8?



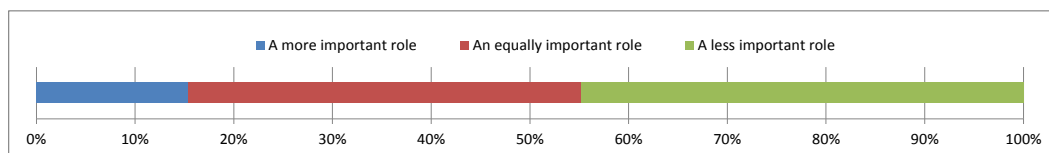
Question: In the last 7 days how many of these days did somebody in your household spend time reading for pleasure to your child who is 8 or younger?  
(N= 538)

**45%**  
of teens say reading books for pleasure is less important than other media activities

Today’s teens have more variety in entertainment available to them than ever before. Between movies, music, apps, and games, book publishers aren’t competing on a title by title basis—they’re competing on a media basis as well.

We asked teens to rate the importance of books in their life against other forms of media, and 45% of teens stated that reading books for pleasure played a less important role in their life than activities such as music, games or movies. Only 15% of teens felt that books were more important than other media activities.

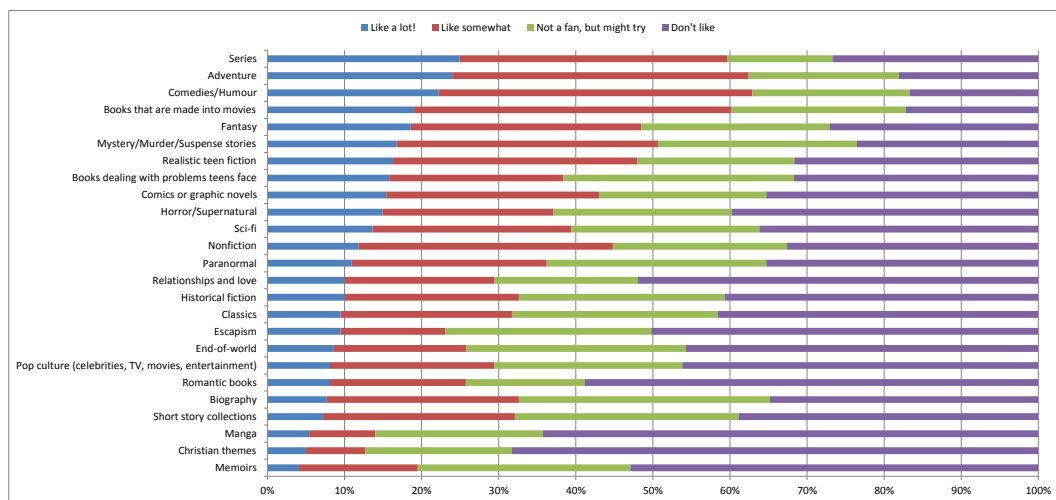
### HOW BOOKS COMPARE TO OTHER MEDIA IN TEENS’ LIVES



Question: Compared to other media you use for fun/pleasure (TV, movies, games, etc.), what role do books play in your life?  
(N= 221)

Given the success of blockbuster series such as Twilight or The Hunger Games, it is not surprising that teens chose ‘series’ as their most favoured type of reading material. Adventure and comedy books followed closely behind, along with movie tie-in and mystery/suspense novels.

**WHAT DO TEENS ENJOY READING?**



Question: How much do you like to read each of the following types of books? (Select one response per row)  
(N= 221)

It is clear from our research that books play an active role in the lives of children; many parents engage in reading activities with their children on a daily basis, and the majority of children are reading for fun several days a week, if not daily.

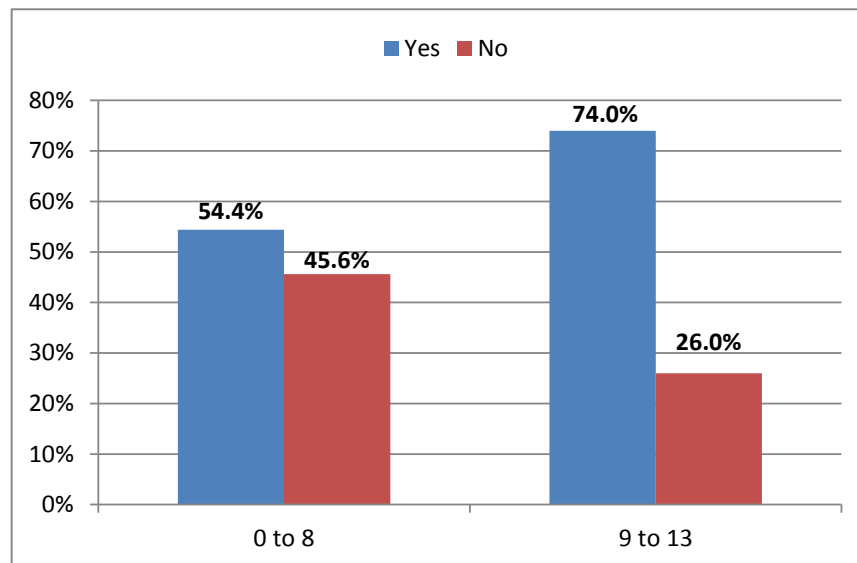
The challenge for publishers, it seems, is in reaching adolescents. Teens read less than children do, and have more forms of media competing for their leisure time. While the majority of teens (55%) believe that books play an equally or more important role in their lives as other forms of entertainment, the margin for the win is small. Encouraging teens to read, and then getting them to recommend titles they enjoy to others, seem to be the issues that publishers will continue to face going forward.

# Giving A Child A Choice

We know from extensive research that giving a child the option to choose what they read contributes to the development of lifelong reading habits.<sup>25</sup> When it comes to developing original content and bringing books into the marketplace, though, the question for publishers and retailers is whether parents actually allow their children to choose their reading materials in practice, and how much influence they have in steering their child's choices.

## DO PARENTS CONSULT THEIR CHILDREN BEFORE MAKING A PURCHASE?

Most parents seek their children's input on book purchases



Question: Was your child involved in the selection of this book?  
(0 to 8 N= 454, 9 to 13 N= 369)

It appears that most parents seek their children's input on book purchases regardless of age, but that the practice becomes more common as children grow older, with 74% for children 9 to 13, up from 54% for children up to age 8.

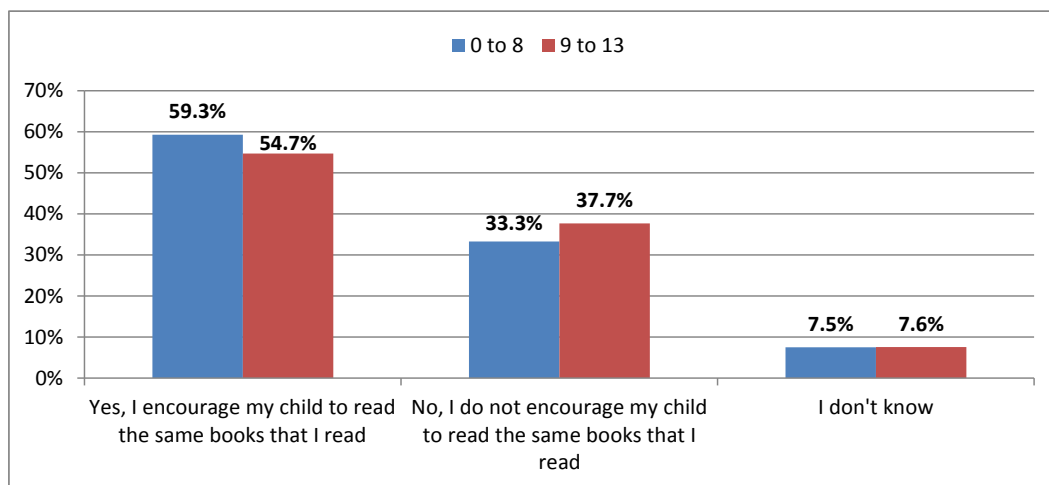
Parents' involvement and encouragement in children's reading is often argued to be key. We asked parents whether they recommend reading materials to their children that they themselves enjoyed as a child, and it turns out that nostalgia plays a fairly central role in children's publishing.

25 Sharon Murphy, *Towards Sustaining and Encouraging Reading in Canadian Society*, April 2013, p. 38 <http://nationalreadingcampaign.ca/test/wp-content/uploads/2012/10/TowardsSustainingAndEncouragingReading.pdf>.

Over half of all parents surveyed say that they encourage their children to read the same books that they read. Where we might have expected a drop in influence as children transition to the older age group, the difference between the two groups was small (33% for younger children vs. 38% for the older group). It seems that parents who want to share their favourite titles with their children will do so over a wider timespan of the child's youth.

**DO PARENTS WANT THEIR CHILDREN TO READ THE SAME BOOKS THAT THEY HAVE READ?**

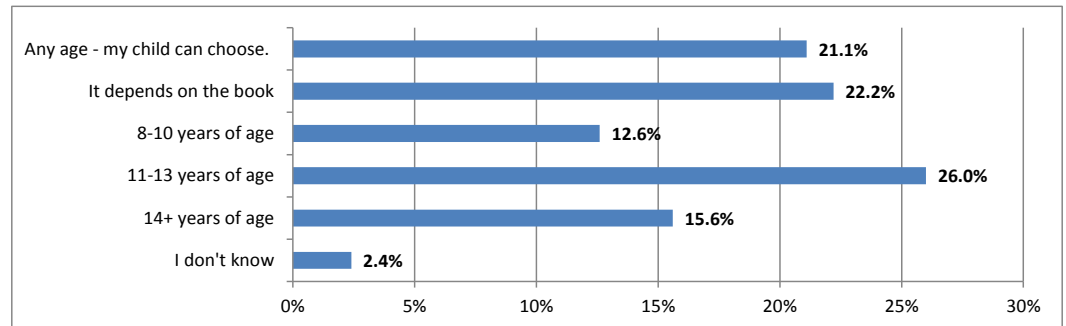
Over half of parents encourage their children to read the same books they read



Question: Do you like to encourage your child to read the same books that you read as a child?  
 (0 to 8 N= 454, 9 to 13 N= 369)

Young adult novels continue their rise to the top of the charts as more and more adults feel comfortable with reading down, especially with runaway hit series like The Hunger Games and Divergent. But at what age do parents feel that it is ok for their children to read young adult books? We asked parents with children ages 0 to 8 to identify when they felt it was appropriate for children to transition from children's books to young adult books.

### WHEN DO PARENTS FEEL THAT IT IS APPROPRIATE FOR CHILDREN TO READ YOUNG ADULT BOOKS?



Question: At what age do you feel it is appropriate for your child to read young adult books?

(N= 454)

The results are fairly spread out. The largest group of parents (26%) felt that 11–13 years of age is an appropriate age to start reading young adult books, while 22% said it depends on the title, and 21% believe that their child can decide when they feel ready.

# Awareness & Influences: Parents

Parents rely primarily on recommendations from friends and family when choosing books to buy for their children

In April 2013, the National Reading Campaign released a study that discussed the importance of encouraging children's motivation to read and the ability to recommend relevant books to children.<sup>26</sup> Finding the right author, format, and subject is integral in creating that spark of interest—what will resonate most: fantasy, graphic novels, nonfiction, or stories about radioactive kids who save the world?

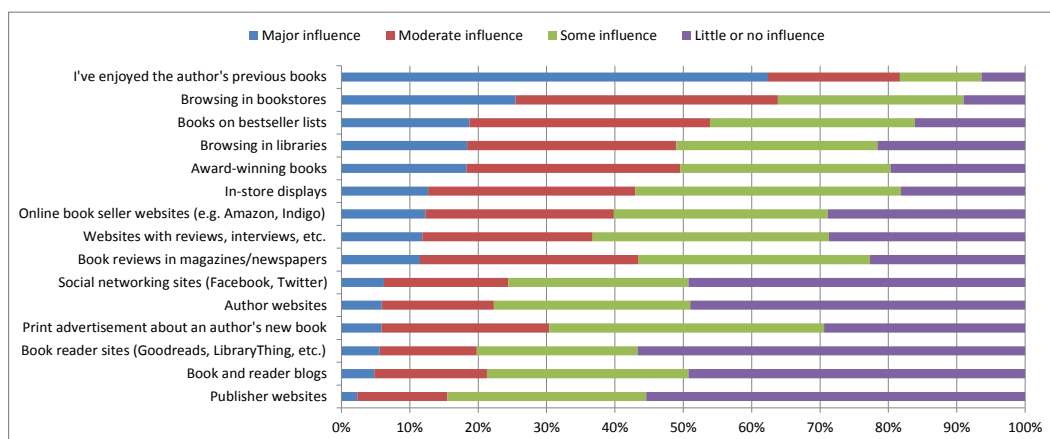
While we have already discussed the degree to which parents let their children choose the books they read, we also felt it was important to ask parents what influences the recommendations they make to their children as well as the factors that influence them when they purchase a book for their child.

When parents are buying books for themselves, their motivations are in line with what we found to be the case for Canadian adults in general.<sup>27</sup> Popular influences included enjoying an author's previous work, browsing in a bookstore, and seeing a book on a bestseller list. When they are choosing titles for their children, parents consider multiple factors that may encourage their children to read, including reading level, subject matter and format.

26 Sharon Murphy, *Towards Sustaining and Encouraging Reading in Canadian Society*, April 2013, p. 34, <http://nationalreadingcampaign.ca/test/wp-content/uploads/2012/10/TowardsSustainingAndEncouragingReading.pdf>.

27 BookNet Canada, *The Canadian Book Consumer 2012: Annual Report*, May 2013, p.70

### WHAT INFLUENCES PARENTS TO BUY BOOKS?



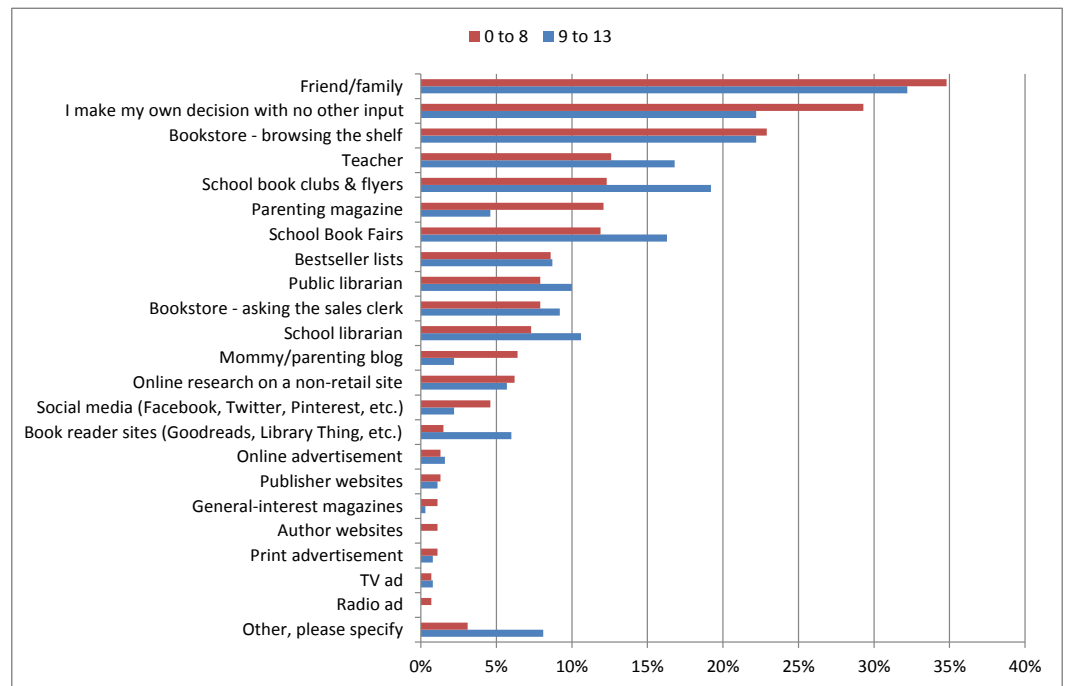
Question: How influential are these in book selections? (Select one response per row)  
(N= 823)

For 9–13 year olds, parents increasingly discover books through teachers, school book clubs and flyers

When it comes to seeking out recommendations, parents rely primarily on recommendations from friends and family for both the 0–8 (35%) and 9–13 (32%) age brackets. There is a distinct shift as we move into the 9–13-year-olds for parents to rely increasingly on school sources such as teachers (17%), school book clubs and flyers (19%), school book sales (16%), and school librarians (11%). In this age bracket, school librarians were consulted with a similar frequency to public librarians (10%).

For both age groups, parents often prefer to go solo and rely on their own research to find books for their children. For 0–8 years of age 29% of parents say they make their own decisions with no outside input, and for 9–13-year-olds 22% of parents make their own decisions. It is likely that awareness factors such as publicity and store location are playing an increasingly important role among parents who don't rely on recommendations.

WHERE DO PARENTS GO FOR RECOMMENDATIONS?



Question: When you buy a book for a child, where do you go for recommendations? (Please select your top 3 sources.)  
 (0 to 8 N= 454 respondents, N= 893 responses; 9 to 13 N= 369 respondents, N= 741 responses)

# Awareness & Influences: Teens

For teens, most  
in-person discoveries  
were made through  
in-store experiences

Many factors influence how teens become aware of the books they read. Often, multiple factors come into play in influencing a teen to read a single book. Teens came into contact with a book an average of 2.3 times before deciding to read it. Most often (45%), this contact comes in the form of in-person interactions, usually a recommendation from a friend or relative (26%). Other ways teens find out about books they read are through school (33%), the library (15%), and receiving them as gifts (13%).

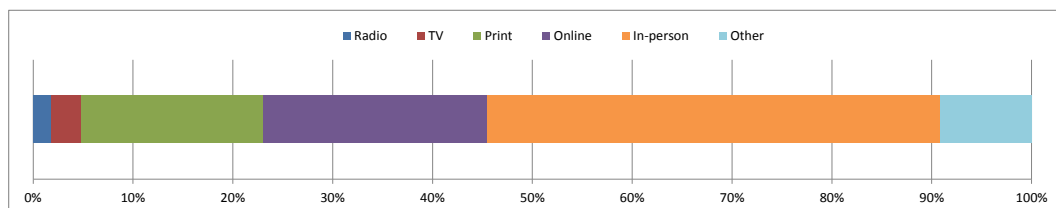
It is interesting to note that these results for teens deviate from what we found in an earlier consumer research study. In that study, which was conducted regarding adult readers' last book purchases, we found that most in-person discoveries were made through in-store experiences, such as seeing a book on a shelf/display (22%) or interacting with a sales clerk (18%). Recommendations from friends and relatives only came into play 12% of the time among adults.<sup>28</sup> Teens in this study were asked about the book they most recently read, which would account for some of the difference.

Online and print media also play a part in how teenagers find their next book. Awareness through online means is achieved in a number of ways, with reading an excerpt (9%), receiving a recommendation on through a social network (8%), and seeing a banner ad on a website (6%) rounding out the top online points of contact. For print media, 11% of teens saw their book on a bestseller list, while 10% read a teaser chapter from a forthcoming book and 6% saw an ad in a magazine.

Radio (2%) and television (3%) play an extremely small part in influencing awareness.

28 BookNet Canada, *The Canadian Book Consumer 2012: Annual Report*, May 2013, p.70

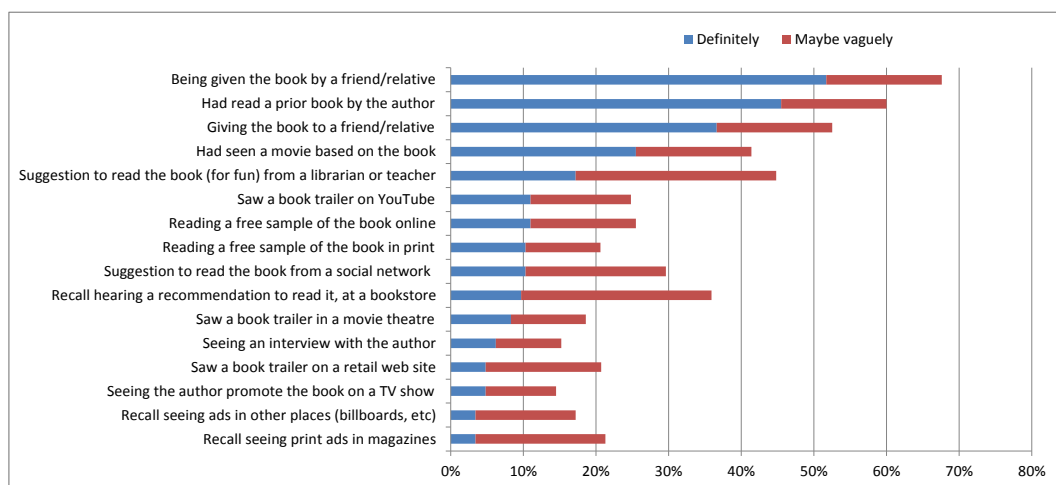
### HOW ARE TEENS FINDING OUT ABOUT THEIR BOOKS?



For the last book that you read, how do you recall finding out about that book? Please select all that apply. (N= 221 respondents, N= 503 responses)

To get a little more in-depth on how specific awareness factors rank with teens, we asked them to think about a book they had read recently and try to remember how they heard about it. As we saw above, personal recommendations rank high among teens—almost 70% said they had ‘definitely’ or ‘possibly’ gotten a recommendation from a friend or relative. The second most popular discovery factor was having read another book by the same author.

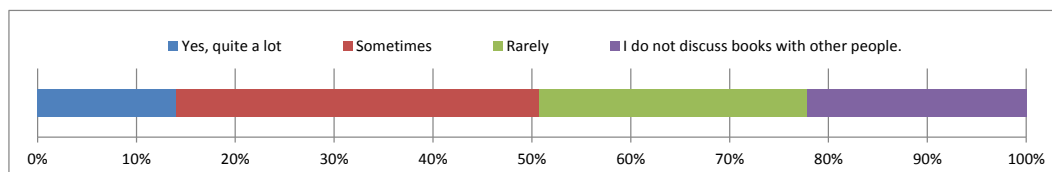
### HOW AWARENESS FACTORS RANK WITH TEENS – BASED ON RECENT TITLE READ



Question: For a recent book that you have read, do you recall any of the following? (Select one response per row) (N= 145)

Just over 50% of teens surveyed responded that they ‘often’ or ‘sometimes’ recommend books to their friends. 22% of respondents claimed that they do not discuss books with other people.

### HOW FREQUENTLY DO TEENS RECOMMEND BOOKS TO EACH OTHER?

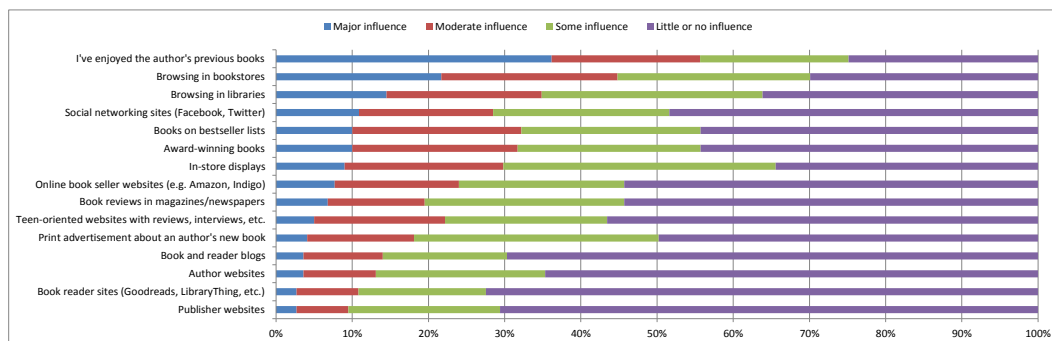


Question: Do you and your friends recommend books to each other?  
(N= 221)

When asked more generally about what influences them to make a book purchase, having enjoyed an author’s previous books (36%) was identified as the most important influence among teens. Other major influences are bookstores, libraries and social networking sites such as Twitter and Facebook. Online sources that ranked low with teens include publisher websites, reading sites such as Goodreads, author websites and blogs.

### WHAT INFLUENCES TEENS TO PURCHASE A BOOK?

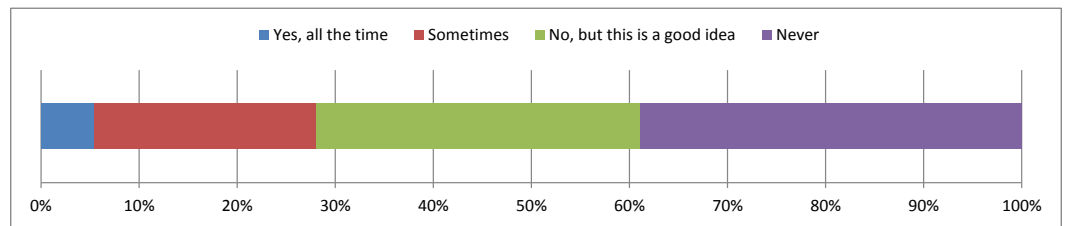
**28%**  
of teens visit  
authors’ websites



Question: How influential are these in your book selection? (Select one response per row)  
(N= 221)

While teens do tend to seek out additional works from their favourite authors, only about a quarter of them (28%) spend time visiting authors’ websites on a regular or occasional basis. Interestingly, though, 33% of respondents say they have not visited a website of their favourite author but think they would like to do so in the future.

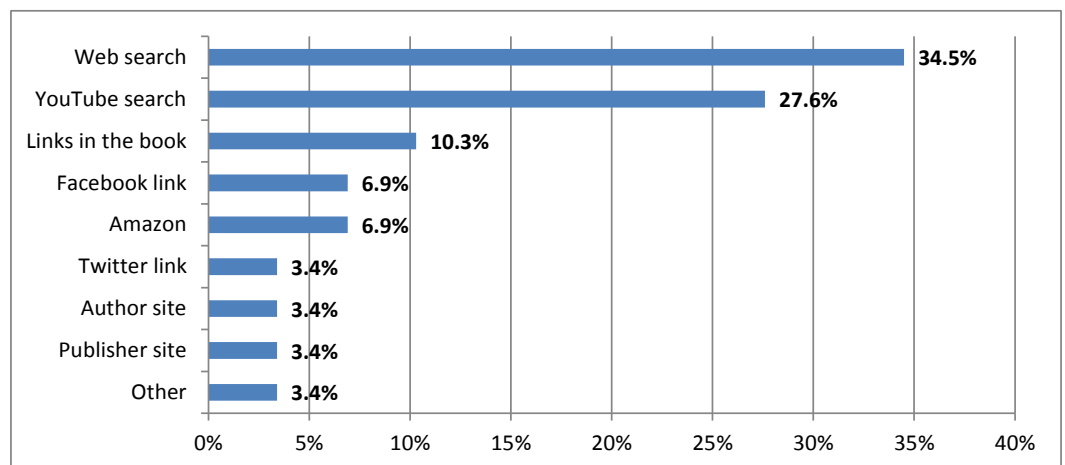
### DO TEENS UTILIZE AUTHOR WEBSITES?



Question: Do you visit the websites of your favourite authors for further information?  
(N=221)

Only 13% of teens surveyed had ever seen a book trailer. Of those who had, 35% had found the trailer through a basic web search, and 28% found it on YouTube. Though in smaller percentages, links found within a book (10%), shared links on Facebook (7%), and Amazon (7%) also played a role in book trailer discovery.

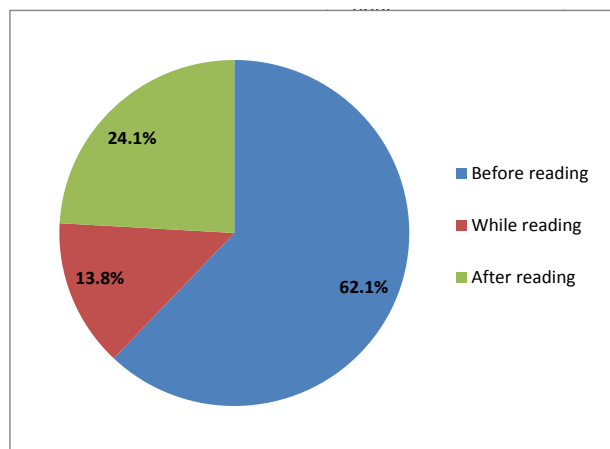
### WHERE DO TEENS FIND BOOK TRAILERS?



Question: How did you find the trailer?  
(N= 29)

The good news for publishers and book marketers is that the majority of teens (62%) viewed the book trailer before they read the book.

**ARE TEENS FINDING TRAILERS BEFORE THEY READ THE BOOK?**



Question: Did you see it before, during, or after reading the book?  
(N= 29)

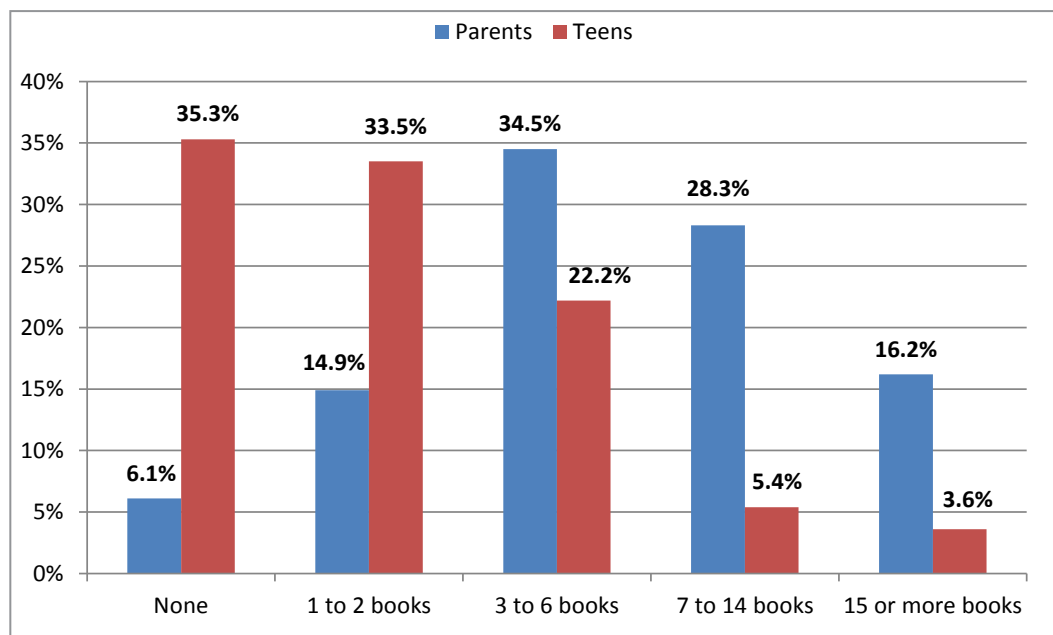
# Purchase Patterns

To get an overview of book-buying behaviour among parents and teens, we asked both groups some general questions about how many books they purchased in the last six months, and when and where they made their most recent purchase.

The majority of parents (35%) had purchased 3–6 books for their children over the past six months. An additional 28% had purchased 7–14 books. Perhaps unsurprisingly, 35% of teens had not purchased any books over the previous six months. 34% had purchased 1–2 books, and 22% had purchased 3–6 books.

## NUMBER OF BOOKS PURCHASED IN THE PAST 6 MONTHS

**70%**  
of parents have purchased a children's book in the last month



Question (Parents): How many children's books (in any format) have you purchased within the past 6 months?

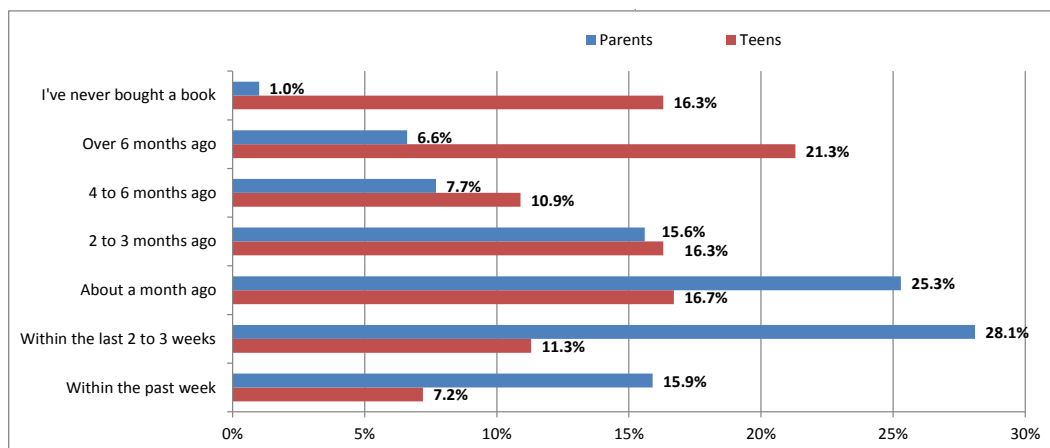
Question (Teens): How many books (in any format) have you purchased within the past 6 months?

(Parents N= 823, Teens N= 221)

The majority of parents had most recently purchased a children's book within the last month (70%). This survey was fielded in May 2013, which would have captured any sales occurring prior to the end of the school year.

Teens purchased books less frequently, and 16% of teens reported that they have never purchased a book.

**WHEN DID THEY LAST PURCHASE A BOOK OR CHILDREN'S BOOK?**



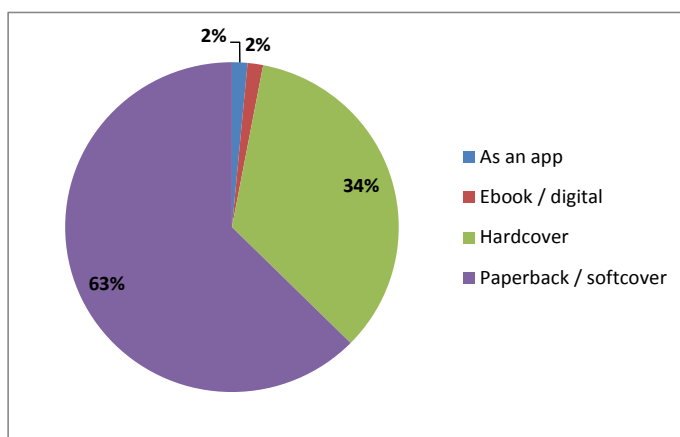
Question (Parents): When did you make your last children's book purchase?

Question (Teens): When did you make your last book purchase?

(Parents N= 823, Teens N=221)

When it comes to format, parents with children ages 0–8 are more likely than parents of children ages 9–13 to have purchased a hardcover book in the last 6 months (34% vs. 34%). 71% of parents purchased paperback books for their children 9–13, and were slightly more likely to have purchased an ebook (5%).

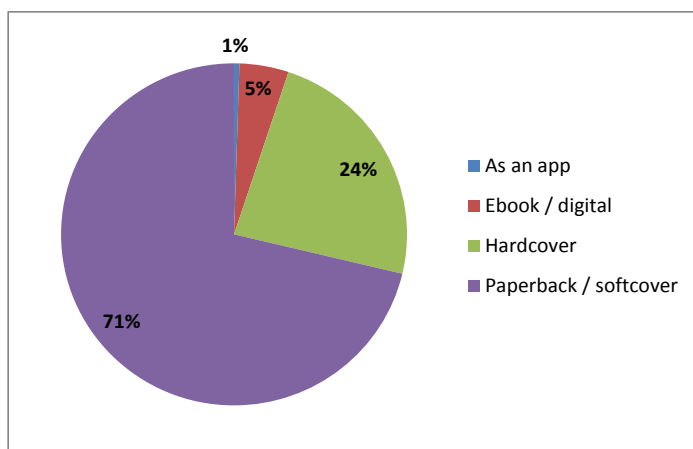
**CHILDREN 0 TO 8**



In what format did you purchase this book?

(0 to 8 N= 45)

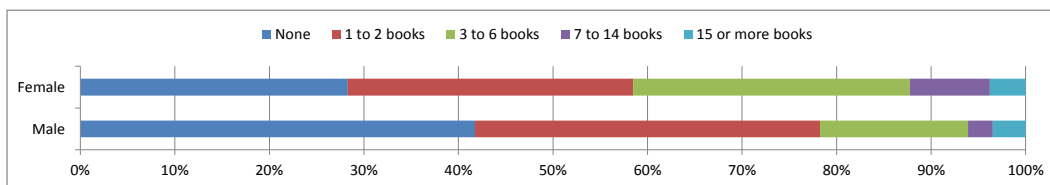
**CHILDREN 9 TO 13**



In what format did you purchase this book?  
(9 to 13 N= 369)

To look a little more closely at teen book buying behaviour, we drilled down to review purchases broken out by gender, and found that female teens tend to purchase more books than males. Males were more likely than females to have purchased 1–2 books in the last six months (37% vs. 30%), whereas more females than males had purchased 3–6 books in the same period (29% vs. 16%).

**HOW MANY BOOKS HAVE YOU PURCHASED IN THE LAST SIX MONTHS? TEENS BY GENDER.**

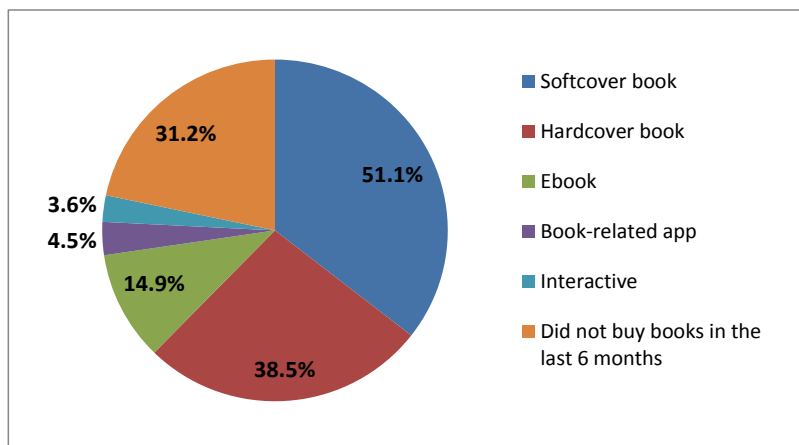


Question: How many books (in any format) have you purchased in the last six months?  
Crosstab question: What is your gender?  
(N= 221)

The majority of books purchased by teens in the last six months were paperback books (51%), followed by hardcover (39%). Ebooks comprised 15% of purchases, which is comparable to the average number of ebooks being purchased by adult book buyers in Canada for the same period.<sup>29</sup>

<sup>29</sup> BookNet Canada, *The Canadian Book Consumer 2012: Annual Report*, May 2013, p.10

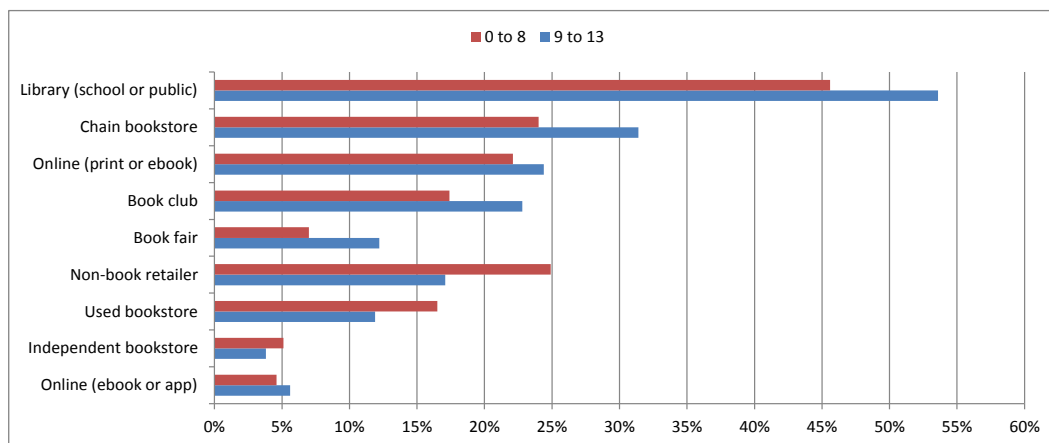
**WHICH FORMATS WERE PURCHASED BY TEENS IN THE LAST 6 MONTHS?**



Question: What formats of books have you purchased in the last 6 months for yourself?  
(N= 221 respondents, N= 318 responses)

When it comes to obtaining books for their children, parents are active users of their public libraries. 30% of books for children 0–8, and 37% of books for children ages 9–13, are obtained at a public library. 9–13-year-olds obtain over half (54%) of their books through school or public libraries.

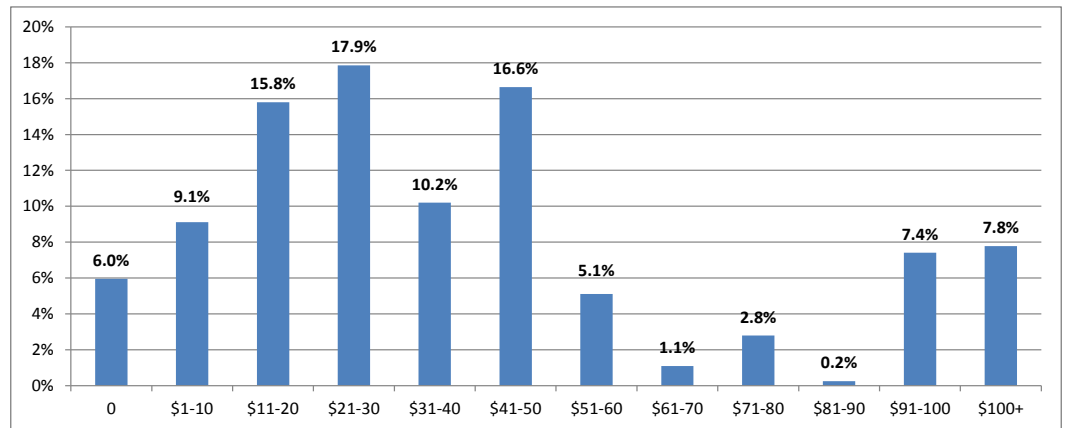
**WHERE DO PARENTS OBTAIN BOOKS FOR THEIR CHILDREN?**



Question: Of these, where do you most often get books for your children? Select up to 3.  
(0 to 8 N= 454 respondents, N= 771 responses; 9 to 13 N= 369 respondents, N= 677 responses)

Nearly 70% of parents had spent between \$1 and \$50 on children’s books over the past 6 months, and over 24% spent over \$50.

**IN THE PAST 3 MONTHS HOW MUCH DID PARENTS SPEND ON CHILDREN'S BOOKS?**



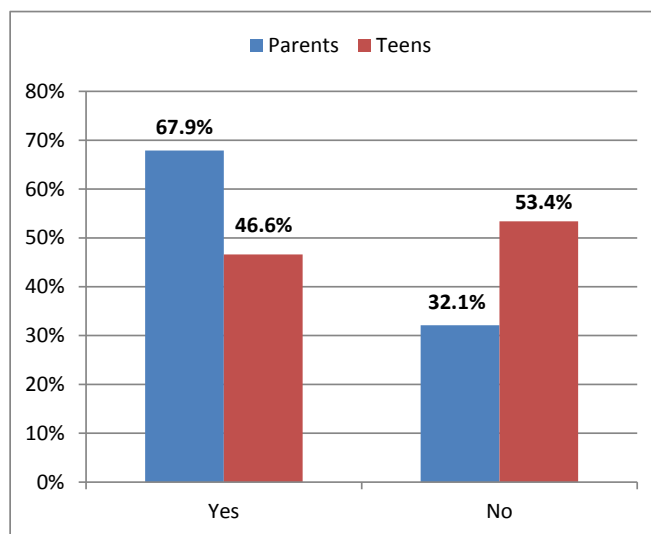
Question: In the past 3 months, about how much have you spent in total buying children's books? Please enter a whole number.  
If you don't know for sure, please estimate.  
(N= 823)

# Library Use

BookNet Canada’s 2012 annual consumer study of adult book buyers found that respondents between the ages of 30 and 44 years are most likely to be using the library.<sup>30</sup> A significant contributor to this midlife surge in library use is likely parents using the library for or with their children. Scholastic’s *Kids and Family Reading Report* found that kids rely more on the library to find books to read for entertainment (60%) than school book fairs (40%) or bookstores (35%).<sup>31</sup>

In the first quarter of 2012, BookNet Canada found that 59% of book buyers surveyed had visited a library within the previous 12 months. Of those respondents, 19% visited the library, either in-person or online, 2 to 3 times a month, and 16% visited once a month.<sup>32</sup>

## ARE PARENTS AND TEENS USING THEIR LOCAL LIBRARIES?



Question: Have you visited your local library in the last six months?  
(Parents N= 823, Teens N=221)

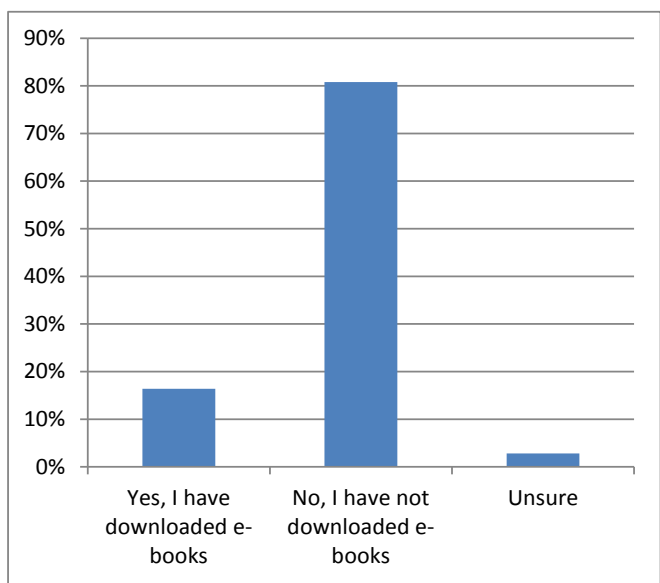
30 BookNet Canada, *The Canadian Book Consumer 2012: Book Buying Behaviour in Canada January to June 2012*, September 2012, p. 49.  
31 Scholastic, *Kids & Family Reading Report 4th Edition*, January 11, 2013, p. 45.  
32 BookNet Canada, *The Canadian Book Consumer 2012: Book Buying Behaviour in Canada January to June 2012*, September 2012, p. 49.

**68%**  
of parents and  
**47%**  
of teens have visited  
the library in the last  
six months

When comparing book purchasing to library use we found that both groups of respondents, parents and young adults, were active book buyers and users of the library: 94% of parents and 65% of teens bought books in the last six months as compared to parents at 68% and teens at 47% who visited the library in the prior six months.

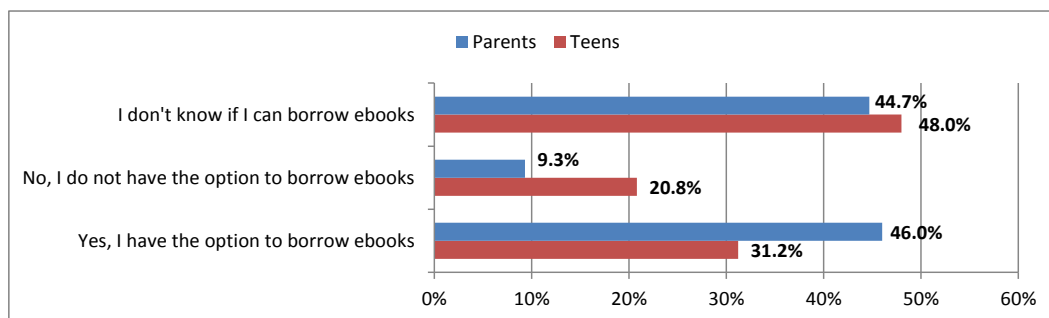
Looking specifically at the borrowing of ebooks from libraries, we asked parents about their own awareness and behaviour around library ebooks. 46% of parents are aware that they are able to borrow ebooks from their public library, but despite this only 16% of parents have actually taken advantage of this service. Teens were significantly less aware than parents with only 31% of teens stating that they were aware that they could borrow ebooks from their library.

### ARE PARENTS BORROWING EBOOKS?



Question: Have you previously downloaded ebooks from the library?  
(Parents N= 819)

### DO THEY KNOW THAT THEY CAN BORROW EBOOKS?

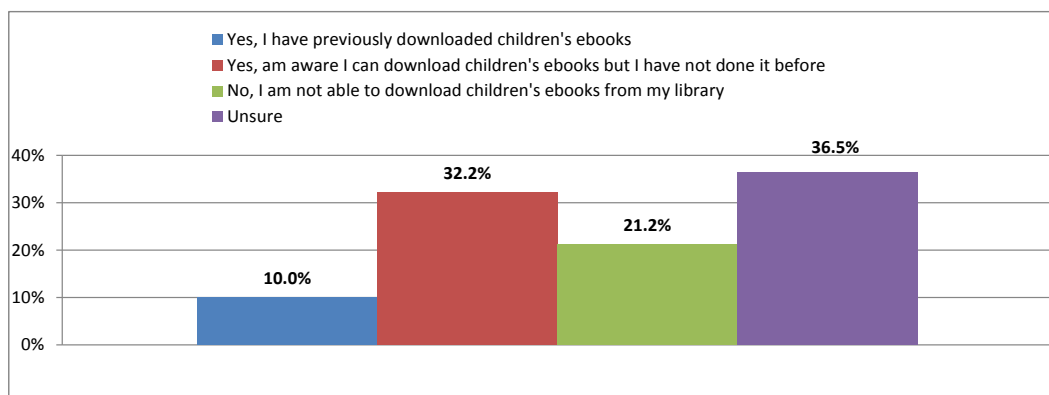


Question: Do you know whether you are able to borrow an ebook from your local public library?  
(Parents N= 819, Teens N=221)

**10%**  
of parents have borrowed children's ebooks from the library

We also asked parents if they were able to borrow children's books in ebook format from the library. Only 10% of parents said they have actually used this service, while 32% said they were aware of the service but had never made use of it. 37% weren't sure if their library provided this service.

### DO PARENTS KNOW THAT THEY CAN BORROW CHILDREN'S EBOOKS?



Question: Are you aware that you can download children's ebooks from the library?  
(N= 819)

We know that parents are more likely than adults without children to make use of library services, and since nearly half of the parents we surveyed say they currently read ebooks (41%), it stands to reason that more parents would borrow ebooks from libraries if they were aware the service existed. The issue of parents failing to utilize ebook services from libraries seems to stem from a lack of awareness and not necessarily a lack of interest.

# Pricing & Price Tolerance

There is a lot of conjecture around how much buyers are willing to spend on books. How much are consumers buying discounted books as compared to full price? What are they paying? Are they willing to spend more on a bestselling author?

We spent some time looking at what parents and teens paid for their last book purchase, and found that behaviour differs depending on whether a parent is making the purchase or a teen is buying for their own use. As children age, parents become more willing to pay a slightly higher price. But with higher price tags come higher expectations: parents are starting to expect (and are willing to pay for) bundled ebooks and access to additional digital content.

## CHILDREN

Parents spend an average of \$15 for hardcover books and \$10 for paperbacks for their children

On average, parents are spending \$15.04 for a hardcover book for their children ages 0–13. Looking at only children 0–8 years old the figure is considerably lower (\$10.67), likely because many of these are board books or hardcovers of shorter length.

Similarly, the price point for paperbacks was also lower for 0–8-year-olds (\$7.36) than pre-teens (\$12.41), with an average of just under \$10.00 paid for paperbacks overall.

For ebooks, when we divided up data by price points the sample size was too small for the data to be statistically representative. On average, however, when we excluded books sold at a \$0 price point, we saw an average price of \$8.79 for all ebooks purchased for children from 0–13 years of age.

40% of parents expect to pay more if a bestselling author or celebrity wrote the book.

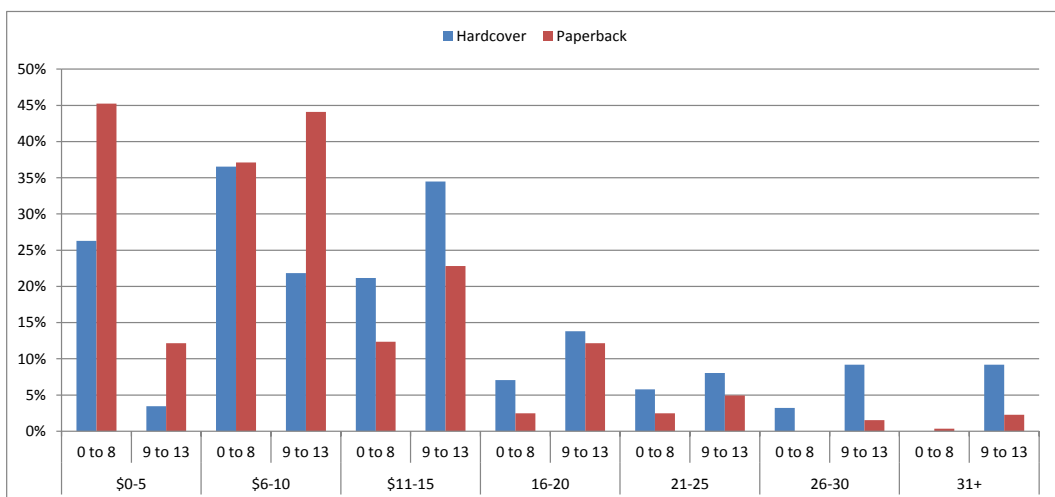
**AVERAGE PRICE PAID FOR LAST BOOK PURCHASE**

	0-8	9-13	Average
Hardcover	\$10.67	\$19.41	\$15.04
Paperback	\$7.36	\$12.41	\$9.89

A lower price point and greater discount purchasing is much more evident for 0–8-year-olds. For print books, the majority of softcover purchases are priced from \$0–5 for 0–8-year-olds (45%), while for 9–13-year-olds most (44%) are in the \$6–10 range. In hardcover, parents are primarily paying \$6–10 for books for 0–8-year-olds (37%) and \$11–15 for 9–13-year-olds (35%). Some of this is likely due to the length of the book and may also be attributed to the higher number of purchases made for children in the younger age bracket.

**PRICE PAID FOR MOST RECENT BOOK PURCHASE**

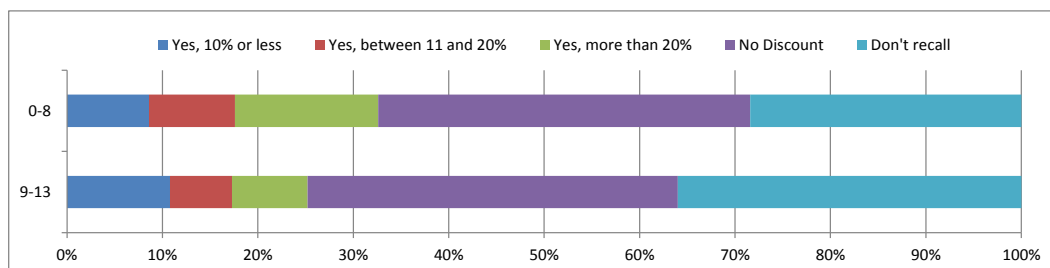
Discount shopping is more of a factor for 0–8-year-olds



Question: Please indicate the approximate price you recall paying for this book? Type in exact dollars and cents. (0–8 N= 454, 9–13 N= 369)

Discount shopping is more of a factor for 0–8-year-olds, with discounted purchases of greater than 20% making up 15% of sales. For 9–13-year-olds, we see the majority of purchases (11%) being made at a discount of less than 10%. Both age groups saw 39% of purchases taking place with no discount.

### ARE PARENTS PAYING FULL PRICE?



Question: Do you recall if this was a discount off of the suggested retail price for this book?

Crosstab Question: What is your gender?

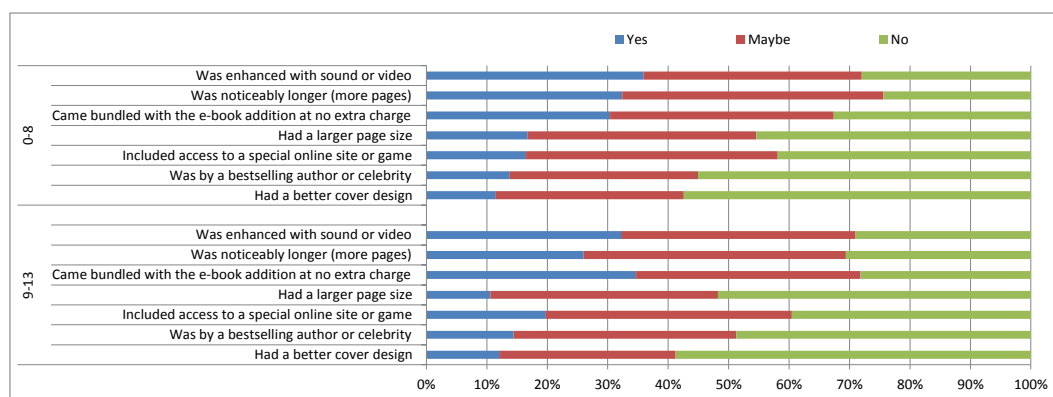
(0-8 N= 454, 9-13 N= 369)

**67%**  
of parents of  
0-8-year-olds  
would consider  
paying more  
for a print book  
bundled  
with an ebook

We asked parents what features or factors they consider when paying a higher price for a book. For parents of 0-8-year-olds, the primary expectation was the book being enhanced with sound or video, followed by a higher page count. 67% of parents of 0-8-year-olds said they would or might pay more for a print book bundled with an ebook.

As children transitioned to the 9-13 age bracket there is an increased emphasis on digital, and we see more willingness to pay an increased price point if that means gaining access to online games or print books bundled with ebooks.

### BUYERS WOULD HAVE EXPECTED TO PAY MORE FOR THEIR BOOK IF...



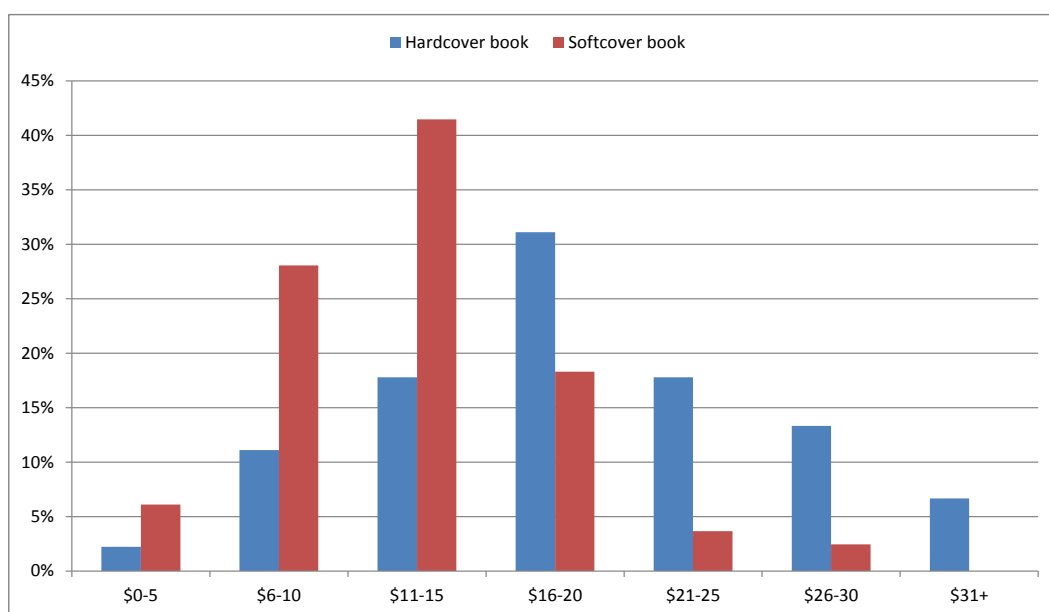
Question: At the time you considered this book/app for purchase, might you have expected to pay more if the book...

(0-8 N= 454, 9-13 N= 369)

## TEENS

Teen buying patterns seem to follow a natural arc extended from 9–13-year-olds. Teens are willing to pay slightly more for books—in the \$16-20 range for hardcovers (31%) and the \$11-15 range for paperbacks (42%). These ranges are in line with what was seen in BookNet Canada’s 2012 consumer research, which found that the average price paid by adults was \$19.49 for hardcovers and \$12.59 for paperbacks.<sup>33</sup>

### PRICE PAID FOR MOST RECENT BOOK PURCHASE

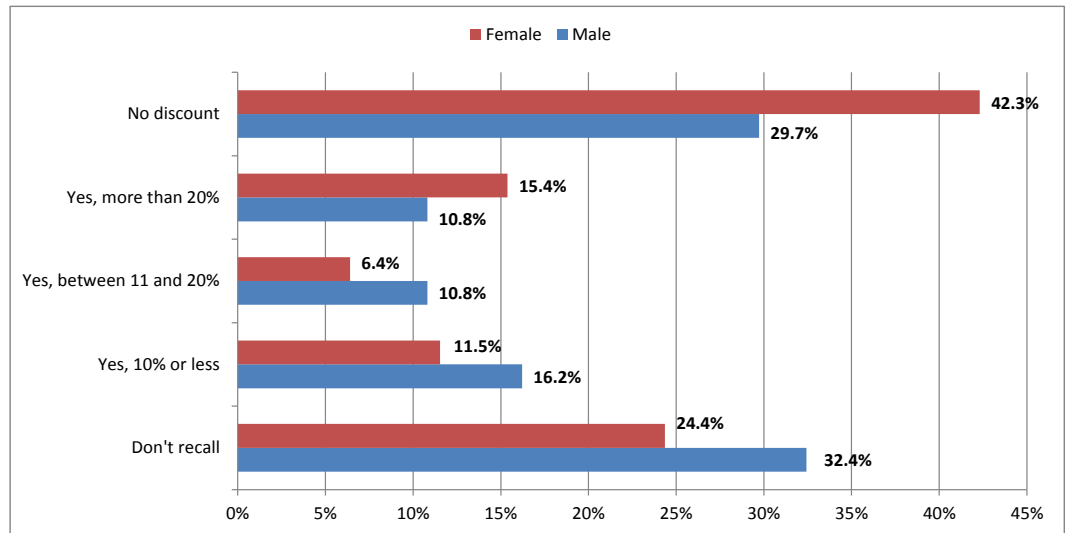


Question: Please indicate the approximate price you recall paying for this book: Type in exact dollars and cents.  
(N=152)

Female teens are the bargain hunters, with 42% of purchases by females being discounted as compared to only 30% of purchases by males. The majority of discounted purchases (14%) were less than 10%, while 13% were discounted more than 20%.

33 BookNet Canada, *The Canadian Book Consumer 2012: Annual Report*, May 2013, p. 18.

**ARE TEENS PAYING FULL PRICE?**

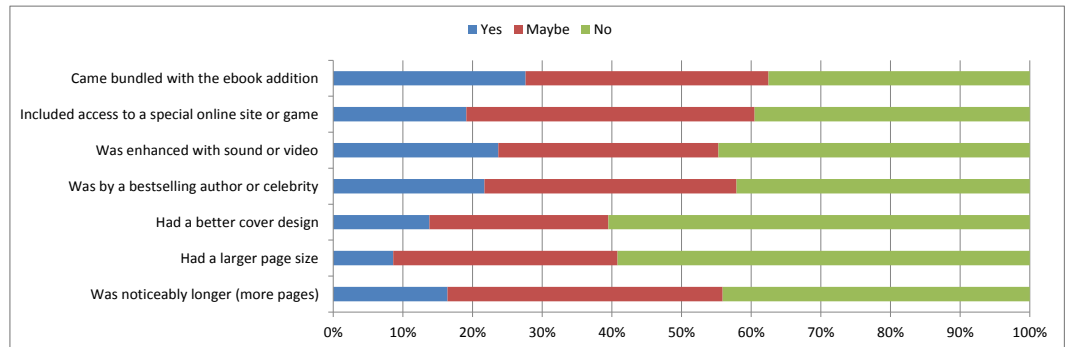


Question: Do you recall if this was a discount off of the suggested retail price for this book?  
 Crosstab Question: What is your gender?  
 (N= 152)

As we saw with the 9–13 age group, teens appear to be willing to pay more for print books bundled with ebooks, with 63% saying that they are willing or may be willing to pay a higher price for this feature. Again, like the pre-teen group, young adults are focused on digital, with 55% willing to pay more for sound or video, and 60% willing to pay more for books that give them access to special online website or games.

49% of teens expect to pay more for a book if a bestselling author or a celebrity writes it.

TEENS WOULD HAVE EXPECTED TO PAY MORE FOR THEIR BOOK IF...



Question: At the time you considered this book/app for purchase, might you have expected to pay more if the book...  
(N= 152)

# Conclusion

## CHILDREN'S UPTAKE ON EBOOKS EXPECTED TO INCREASE

Ebook readership in families is already fairly high—41% of parents and 27% of teens have already adopted digital reading, and based on how parents and teens see themselves reading in the future, we predict that there will be another surge in e-reading coming soon.

Parents who read ebooks are significantly more likely than those who do not to predict that their children will be reading 'slightly' to 'significantly' more ebooks in the near future. And given that we know that a significant majority of parents who don't currently read ebooks themselves have predicted that they will be e-reading in the future, this trend is likely to pick up steam.

Teens also see themselves reading digitally in the future, but when asked to pick a preferred format, they chose print books, ebooks, and no preference in virtually equal numbers. It appears that teens are not committed to one format versus another, and will likely make their choices based on convenience and price.

Access to devices and concerns about damaging or losing devices ranked high among teens as barriers to reading digitally, particularly for teens who didn't prefer one format over the other. It stands to reason that as the prices of suitable devices go down, or the discretionary income of teens increases as they grow older, that they may very well further adopt ebooks.

When it comes to genre preference in digital format, parents feel their children will gravitate to ebooks in some subjects more than others; the top categories of interest were picture/story books (24%), series/chapter books (21%), activity books (21%), and leveled readers (13%).

## APP USE

Not many parents view apps as a reading activity, but nearly 50% of parents 'agree strongly' that apps have the potential to be beneficial educational tools. With children as young as 3 years of age having regular access to apps, apps that are fun, educational and help to improve reading skills are at the top of the list for parents.

App usage steadily increases with age. The one exception to this pattern is seen with book-related apps, whose usage steadily declines as age increases. The percentage of parents with book-related apps downloaded to their devices remains fairly even between the two age groups we looked at (0–8 and 9–13), but there is a significant decrease in book apps in the teens surveyed.

As the distinction between ebooks and apps can often be blurry, it is important for publishers to be able to promote quality educational content. The issue seems to tie both to discoverability and the quality of the product. 40% of parents say they struggle with finding quality apps and, while most parents are willing to pay for quality apps, they need to be convinced of that quality.

## TABLET ADOPTION TO INCREASE AS E-READER OWNERSHIP LEVELS OFF

In BookNet Canada's report *The Canadian Book Consumer 2012: Annual Report*, we found that book buyers ultimately preferred to read their ebooks on dedicated e-readers rather than on multi-use tablets. That being said, since entering the marketplace the cost of tablets has dropped and adoption rates have increased — and our findings show that this point rings particularly true for families.

When asked about which devices they currently had in their households, parents were significantly more likely to own a tablet versus a dedicated e-reader; this pattern also held for teens, though they were less likely than parents to own either device.

This has implications for both publishers and e-tailers, as e-reading via a tablet does not limit the reader to the store associated with a dedicated device. For e-tailers, branding will become particularly important as readers can download books from a variety of applications. For publishers, this will impact where marketing and merchandising budgets are ultimately directed, as readers experience the freedom to buy where they please.

## INCREASE IN ONLINE DISCOVERABILITY

While word of mouth is still the most common factor in discoverability, both parents and teens are active in online engagement when it comes to seeking out information on books and authors. 43% of parents currently read sample chapters online prior to purchasing a book, and an additional 18% are interested in doing so in the future.

This trend seems likely to continue, since parents report that they are very interested in participating in more book-related online activities to find books for their children in the future.

Book trailers ranked low among teens as a tool for discovery, and only a small group (13%) stated that they had ever seen a book trailer. Among those who had seen one, the majority had sought out the trailer before reading the book, and many had discovered it through a basic web search.

However, teens *do* engage in other book-related activities online: just over a quarter of teens reported spending time on authors' websites on a regular or occasional basis. Of teens who don't currently visit author sites, almost half expressed an interest in doing so in the future.

Teens continue to engage heavily with Facebook, with 40% stating that they 'liked' brands and series on Facebook 'occasionally' or 'very often.' There was significantly less engagement with series and brands on Twitter, though just over a third of teens stated that they were 'somewhat' or 'very' likely to extend their engagement with brands from one social networking platform to another. This points to the importance of maintaining a consistent voice and brand image across platforms.

The jury is still out as to the dominant factors that determine success in the world of e-reading and technology. Ebook sales have remained relatively stable in Canada for over a year, but the dust has yet to settle. Whether we're talking about online engagement, device adoption, or consumption of ebooks, it's clear that parents and teens are keen adopters with an appetite for more.

## APPENDIX A

# Next Steps for Industry Professionals

The data in this study has a variety of applications for publishers, librarians, and others involved in the Canadian book industry. We've put together the following summary of major findings, along with suggestions for translating these points into action. This list is by no means exhaustive, but it's a good place to start.

**43% of parents currently read sample chapters online prior to purchasing a book, and an additional 18% are interested in doing so in the future.**

Provide sample chapters online, on your website, on authors' websites, and on retail sites where possible. Promote these sample chapters in your marketing materials.

**Over a quarter of teens reported spending time on an author's website, and of those who didn't, close to half reported an interest in doing so.**

Stress to your authors the importance of maintaining a website, and be sure to cross-promote author websites (on the book page and author page of the publisher's website, on the copyright page of the book/ebook, in ads for the book, in promotional material such as bookmarks, posters, etc.).

**Both parents and teens are most likely to buy a book if they've enjoyed a previous book by the same author. Parents hear about books most often through friends and family, or while browsing in bookstores.**

Leverage cross-promotional possibilities in your print and ebooks: link to other books from the same author or series, or recommend similar books.

**Over half of all parents surveyed encourage their kids (0–13) to read the same books they did.**

Tap into nostalgia in marketing and advertising. Regularly promote the classic titles in your list, and consider offering discounted bundles for parents who wish to stock their child's library with their own favourite childhood books.

**Most families own several multi-use devices; tablet adoption is increasing and e-readers are levelling off. Teens see themselves reading digitally in the future, but when asked to pick a preferred format, they chose print books, ebooks, and no preference in virtually equal numbers.**

Promote the book rather than the format; stress its widespread availability in your marketing, merchandising, and advertising.

**App usage steadily increases with age, with the exception of book-related apps, whose usage declines with age. Apps that are fun, educational, and help to improve reading skills are at the top of the list for parents. Over 80% of the top-selling paid education apps are aimed at children; apps for toddlers and preschoolers showed the most growth from 2009–2011 and account for 58% of the Education category of iTunes.**

Book apps for younger readers have a greater chance at success than book apps for older readers. Promote the educational qualities of your ebooks, and consider developing educational apps to supplement certain books. In some cases, an educational app might actually serve your market better than a book.

**Categories parents thought their children may prefer as ebooks: picture/story books (24%), series/chapter books (21%), activity books (21%), and leveled readers (13%).**

These categories may be the ones parents are most willing to purchase in digital formats. Consider making ebooks available in these categories, or prioritizing these categories as you digitize backlist.

**The genres least preferred in digital format for children are nonfiction (9%), manga/graphic novels (7%), reference books (7%), and religious books (5%).**

Consider actively promoting these print books in store.

**63% of teens will pay more for print books bundled with ebooks, 55% will pay more for sound or video, and 60% will pay more for books that give them access to special online website/games. Parents of kids 0–8 will pay more for print/ebook bundles (67%). There is more emphasis on digital among parents of kids ages 9-13.**

Bundling print and ebook editions is taking off with consumers, so if you haven't yet explored this possibility, now is a good time to consider doing so. When producing digital content for older kids and teens, consider developing enhanced editions with sound or video, or related online content.

**89% of teens reported that all or most of their apps were downloaded for free. Parents are more likely to choose free apps for young kids.**

It may not be worth investing in costly apps for young children or teens without developing an alternative revenue stream.

**Only 10% of parents surveyed had borrowed a kid's ebook from their library. 32% were aware of the service but hadn't used it, and 37% weren't sure if their libraries offered the service.**

Raise awareness about checking out ebooks. You could create how-tos, add information to the publisher's website, add information in ads, etc.

## APPENDIX B

### DEMOGRAPHICS – PARENTS

Total	823	100%
<b>Parent's Age</b>		
18-25	11	1.3%
26-30	43	5.2%
31-35	149	18.1%
36-40	230	27.9%
41-45	222	27.0%
46-50	99	12.0%
51-55	44	5.3%
56-60	16	1.9%
61+	9	1.1%
<b>Gender</b>		
Male	269	32.7%
Female	554	67.3%
<b>Marital Status</b>		
Single parent	90	10.9%
Married parents (part of couple)	729	88.6%
Empty Nester	0	0.0%
Legal Guardian	4	0.5%
<b>Income</b>		
Under \$15,000	6	0.7%
\$15,000-\$24,999	20	2.4%
\$25,000-\$34,999	33	4.0%
\$35,000-\$49,999	64	7.8%
\$50,000-\$74,999	152	18.5%
\$75,000-\$99,999	193	23.5%
\$100,000-\$149,999	169	20.5%
\$150,000 and over	92	11.2%
Prefer not to answer	94	11.4%
<b>Province</b>		
Alberta	103	12.5%
British Columbia	111	13.5%
Manitoba	58	7.0%
New Brunswick	29	3.5%
Newfoundland and Labrador	27	3.3%
Northwest Territories - Nunavut - Yukon	3	0.4%
Nova Scotia	55	6.7%
Ontario	343	41.7%

### DEMOGRAPHICS – PARENTS (CONTINUED)

<b>Province (continued)</b>		
Prince Edward Island	10	1.2%
Quebec	58	7.0%
Saskatchewan	26	3.2%
<b>Population Density</b>		
City or urban area	392	47.6%
Suburban area	239	29.0%
Small town / rural area	192	23.3%

### CHILDREN BY AGE & GENDER

Total	791	100.0%
<b>Boys:</b>		
Boys: 0 to 2	95	12.0%
Boys: 3 to 4	63	8.0%
Boys: 5 to 6	55	7.0%
Boys: 7 to 8	58	7.3%
Boys: 9 to 10	55	7.0%
Boys: 11 to 13	81	10.2%
<b>Girls:</b>		
Girls: 0 to 2	92	11.6%
Girls: 3 to 4	60	7.6%
Girls: 5 to 6	52	6.6%
Girls: 7 to 8	52	6.6%
Girls: 9 to 10	52	6.6%
Girls: 11 to 13	76	9.6%

### DEMOGRAPHICS – TEENS

Total	221	100.0%
<b>Age</b>		
14	35	15.8%
15	59	26.7%
16	62	28.1%
17	65	29.4%
<b>Gender</b>		
Male	115	52.0%
Female	106	48.0%
<b>Population Density</b>		
City or urban area	112	50.7%
Suburban area	67	30.3%
Small town/rural area	42	19.0%

Also available from BookNet Canada



BNC RESEARCH

# The Canadian Book Consumer 2012

## Annual Report



05.2013

PREPARED BY BOOKNET CANADA STAFF



**BOOKNET  
CANADA**

# Acknowledgements

## ABOUT BOOKNET CANADA

BookNet Canada is the not-for-profit agency created by the Canadian book industry and the Department of Canadian Heritage to facilitate improvements in the book industry supply chain. It provides services and develops standards and certification in areas including electronic commerce via EDI (Electronic Document Interchange), bibliographic data, and analysis of point-of-sales and other supply chain data.

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