



BNC RESEARCH

The Canadian Book Buyer 2015



10.2015

PREPARED BY BOOKNET CANADA STAFF



**BOOKNET
CANADA**

Introduction

In many respects, the publishing industry has been in a prolonged state of change. New processes for both print and digital releases, a continued shift towards consumers buying online, and the potential for new sales channels, like subscription models, are only a few of the arenas where the industry remains undecided over what constitutes the new normal.

To get a better sense of where there are on-going changes and where trends have plateaued, BookNet Canada surveyed book buyers in early 2015 about their habits and preferences. With those results, we have created an overview of today's book buyers: who they are, where and how they're making their purchases, and what they're buying.

To qualify for the survey, 4,277 individuals were asked if they had bought a book in the prior month, regardless of whether it was a print book, ebook, or audiobook. From these, 784 answered yes, indicating that 19% were book buyers. This group made up our survey respondents, who were then asked to supply data for all book purchases made in the prior month. This data was then compared to survey data from early 2012 and 2013.

It's worth noting here that book buyers are showing strong representation: of the 784 people surveyed, there was a reported total of 2,170 purchases—an average of 2.8 purchases per book buyer, per month.

Methodology

In March and July of 2015, BookNet Canada circulated an online survey to individuals who had purchased a minimum of one new book, regardless of format, in the prior month (purchases therefore took place in February and June 2015). All respondents were aged 18 or older. The panel was representative and included women and men along with adequate representation from all regions across Canada.

Focus was placed on having a statistically valid panel. This included the recruitment of 784 book buyers, selected from a larger panel to receive a fielding of the survey because they indicated they had purchased or downloaded a book in the prior month. Those who met the criteria were asked to complete the online survey and were given an incentive for doing so.

Respondents were asked to report on all books they purchased in the prior month, whether it was for them or as a gift. Results totalled 2,170 book purchases.

BookNet Canada partnered with Nielsen Book for data collection and processing.

SAMPLING DETAILS

For each fielding of the survey, the margin of error is +/- 4% at a 95% confidence interval. Specific segments, or questions, may have a smaller sample size and a different margin of error. For these questions, we received approximately 400 responses per month for a total of 784 survey responses.

It is important to note that BookNet Canada contracted a different survey company between the 2013 and 2015 data sets. This change may lend itself to some slight demographic or statistical differences between the two data sets. Both survey processes were statistically representative samples and we are confident that such differences are minimal.

Who is buying books?

The average Canadian book buyer has held true since our first consumer research study in 2011. The average Canadian book buyer is:

- female
- 46 years of age
- employed full-time
- college or university graduate
- resides in a city or urban area
- married

Where are consumers shopping?

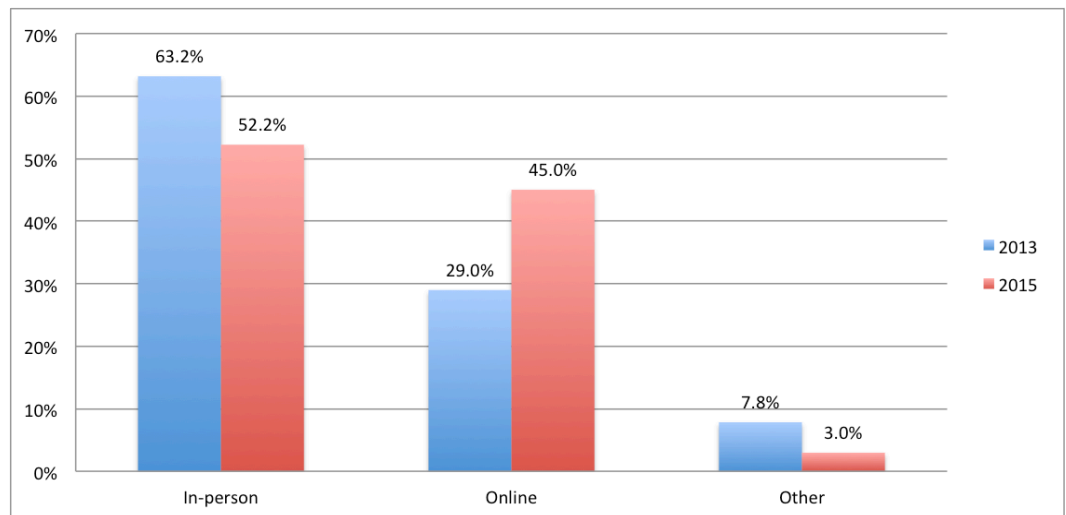
Online purchases of books of any format have increased from

29% in 2013 to
45% in 2015

In both the US¹ and UK², it is reported that online sales have surpassed in-store sales. In Canada, purchasing in-person still remains the most popular way to buy a book, but online purchases have increased drastically since 2013. Online purchases of books of any format have increased from 29% in 2013 to 45% in 2015. The graph below outlines the relative increase of the online channel.

According to CIRA, the Canadian Internet Registration Authority, books were one of the top six goods or services purchased by Canadians in 2015³, with 36% of Canadians who shop online making a book purchase.

HOW BOOKS OF ANY FORMAT ARE PURCHASED – COMPARISON OF 2013 AND 2015



Question: Where did you buy this book? (Q1 and Q2 data included)

N=2,170

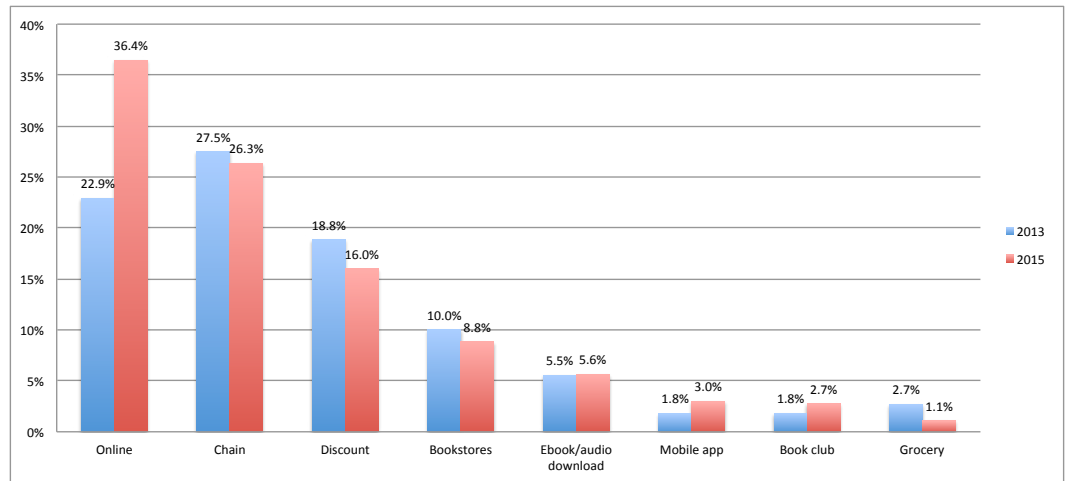
1 Greenfield, Jeremy. 'E-Retailers Now Accounting For Nearly Half Of Book Purchases By Volume, Overtake Physical Retail.' | Digital Book World'. *Digitalbookworld.com*. N.p., 2013. Web. 21 Sept. 2015.

2 Thebookseller.com. 'Online Book Shopping Overtakes In-Store For First Time'. N.p., 2015. Web. 21 Sept. 2015.

3 Cira.ca., 'CIRA | Canadian Internet Registration Authority - FACTBOOK 2015 | The Canadian Internet'. N.p., 2015. Web. 23 Sept. 2015.

The growth in online purchases is primarily happening to the detriment of most physical outlets, such as chains, discount stores, and independent booksellers, with these channels all seeing a slight decline in market share.

SALES BY CHANNEL – COMPARISON OF 2013 AND 2015



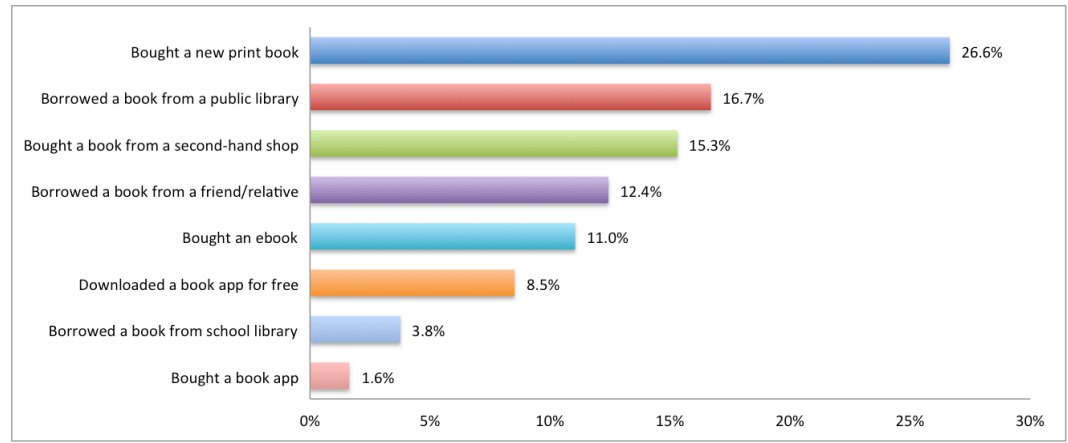
Question: Where did you buy this book?
N=2,170

17% of book buyers borrowed from the public library, and just over **15%** bought used books

As a more general question, we asked book buyers about the various ways they have been obtaining books over the past year. Just over a quarter said they bought books, 17% borrowed from the public library, and just over 15% bought used books.

Meanwhile, 11% said they bought an ebook, while 9% said they downloaded a free ebook.

HOW ARE PEOPLE GETTING BOOKS?

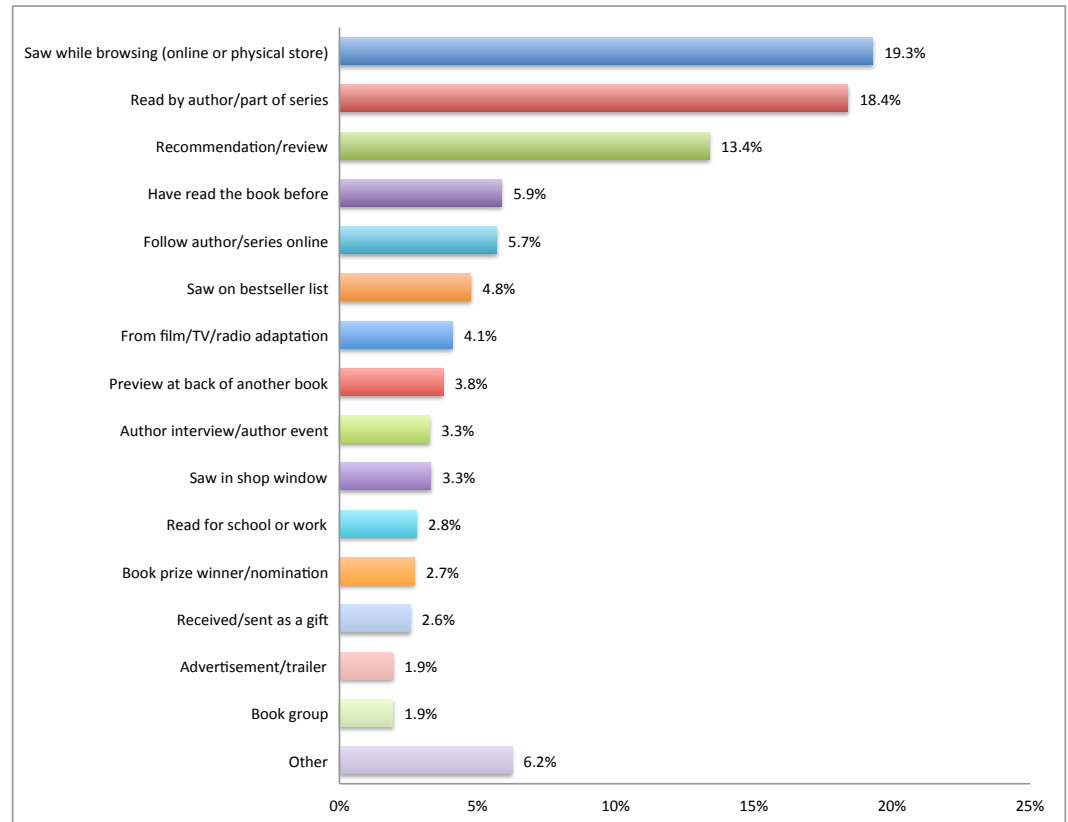


Question: In which of the following ways have you obtained books in the last 12 months, either for yourself or for someone else?
N=2,019

In 2015, only 1.4% of respondents claimed to be using a subscription service. Of those, the majority are getting subscriptions through Amazon Prime, Safari Online, or directly from the publisher.

Knowing where your audience is discovering books should be of utmost importance to any publisher. BookNet Canada will be releasing a research reporting looking at discoverability, which will provide detailed information on where book buyers have found their most recent purchases.

HOW ARE PEOPLE DISCOVERING BOOKS?



Question: How did you become aware of this book?

N=2,690

What are consumers buying?

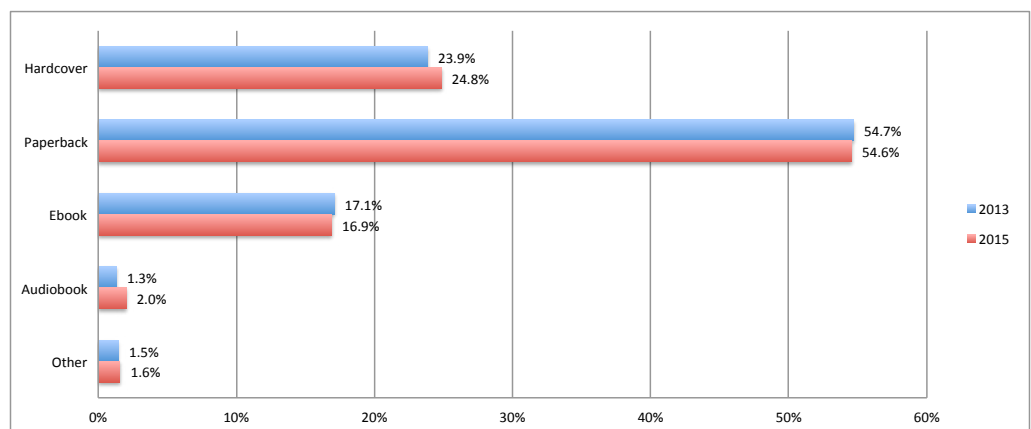
On average, ebook buyers purchase one more book per month than those who don't buy ebooks

Looking specifically at purchases by format, we find that book buyers who read ebooks generally purchase more books, in any format, than their print and audiobook buyer counterparts:

- 176 ebook buyers bought 621 books (in any format), for an average of 3.5 books per month.
- 608 non-ebook book buyers bought 1,549 books (in any format), for an average of 2.5 books a month.
- On average, ebook buyers purchase one more book per month than those who don't buy ebooks.

When we compare 2013 to 2015, we find that ebook purchases have remained exceptionally steady at 17% of all book purchases. In fact, with the exception of audiobooks, which have seen a slight increase, sales of all formats are very similar.

WHAT FORMATS ARE PEOPLE BUYING?

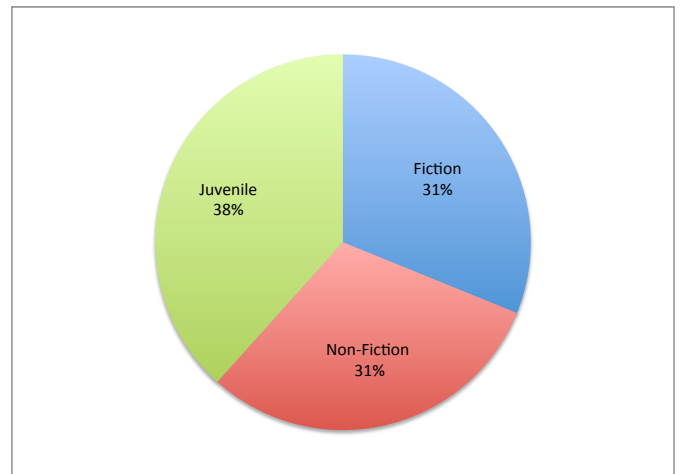
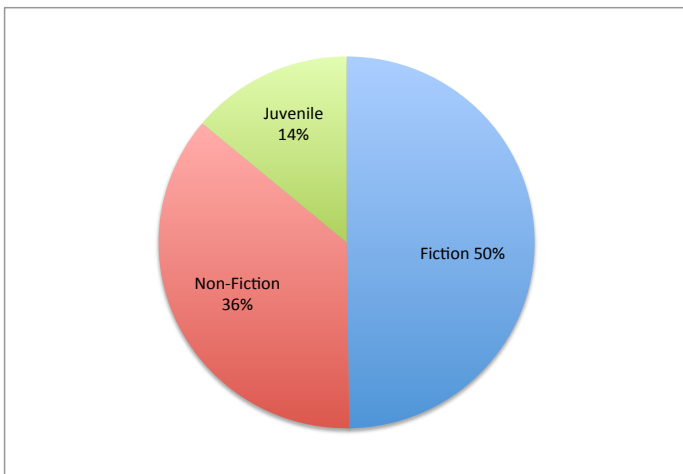


Question: Please indicate the format of this book.
 N 2013=6,004 , N2015=2,170

When we surveyed book buyers about their purchases, we asked them to input ISBNs if they were available. We also asked users to manually input the audience for the book (juvenile or adult) and the subject. When we compare what book buyers said they are reading against purchasing trends throughout 2014, we find what seems to be a trend of consumers purchasing juvenile books but identifying them as adult titles. While there will be a bit of variation due to seasonality, we assume that a fair number of adult consumers are buying YA titles and indicating that these are adult.

SUBJECTS CONSUMERS THINK THEY ARE BUYING

SUBJECTS CONSUMERS ARE ACTUALLY BUYING⁴

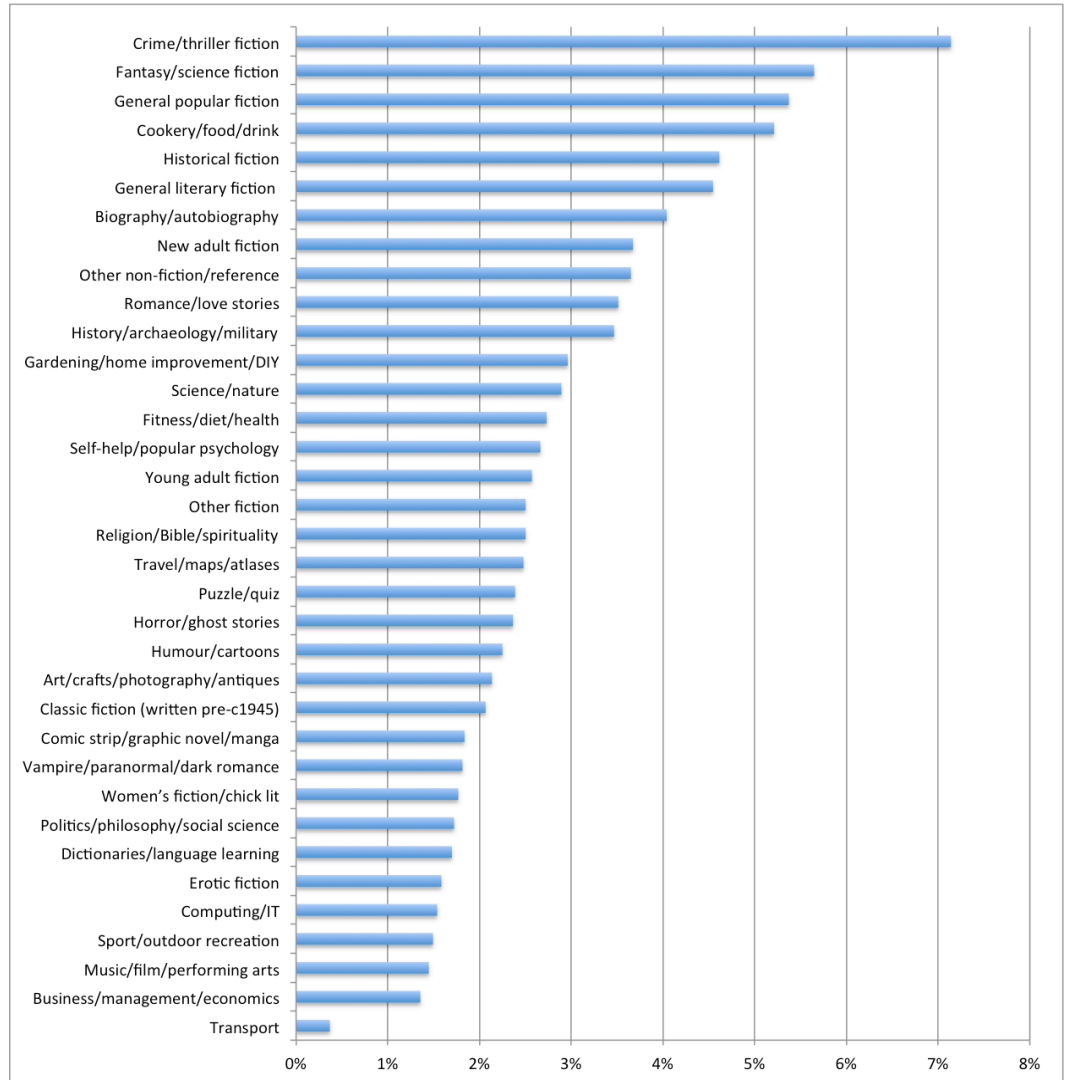


Question: Which one of the following categories best describes this book?
N=2,177

According to how book buyers are categorizing their purchases, we find that Crime/Thriller titles top the list, followed by Fantasy/Science Fiction. While the subject that respondents entered may not be completely accurate, it is interesting to see the types of subjects and categories identified by consumers.

⁴ BookNet Canada. *Canadian Book Market 2014*. www.booknetcanada.ca, March 2015.

WHAT TYPES OF BOOKS PEOPLE ARE READING



Question: Which of the following types of books have you read/used in the last 12 months, either printed books, ebooks, book apps, or audiobooks? Select all that apply.

N=784

Library use

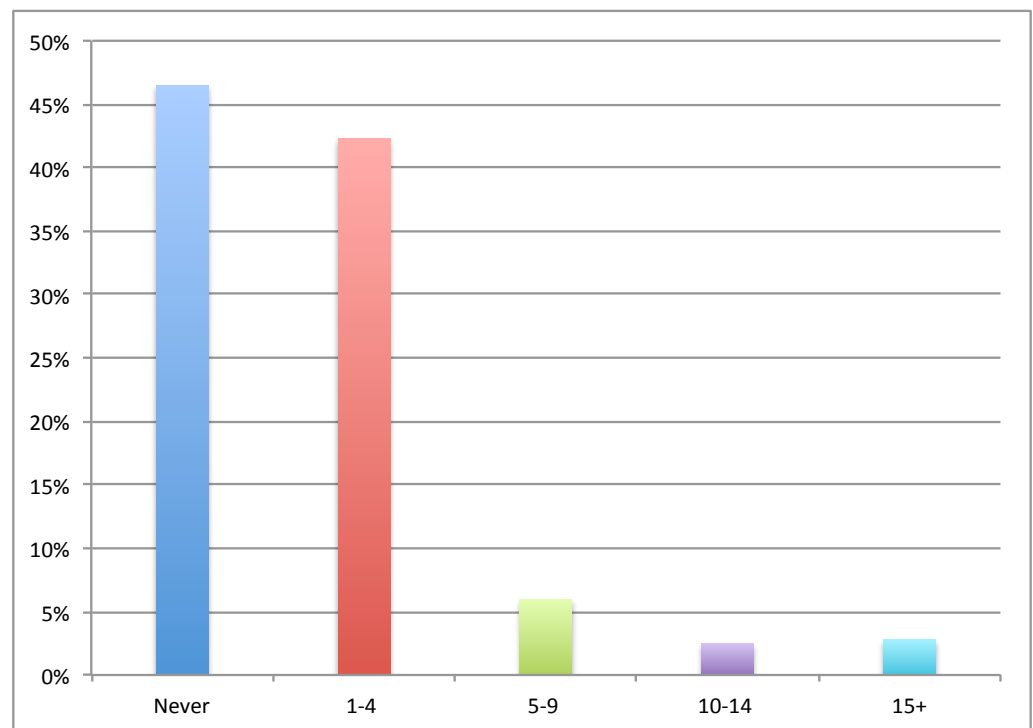
54%
of book buyers visited the library within the prior month

The Canadian Urban Library Council (CULC) reported that the circulation of library items increased 16% between 2000 and 2009⁵. When it comes to book buyers, 54% said they have visited the library, either in person or online, within the prior month.

54% of book buyers said they have visited their public library, either in person or online, in the prior month.

43% visited their local library between 1 and 4 times in the prior month, and an additional 6% visited between 5 and 9 times.

NUMBER OF LIBRARY VISITS IN LAST MONTH



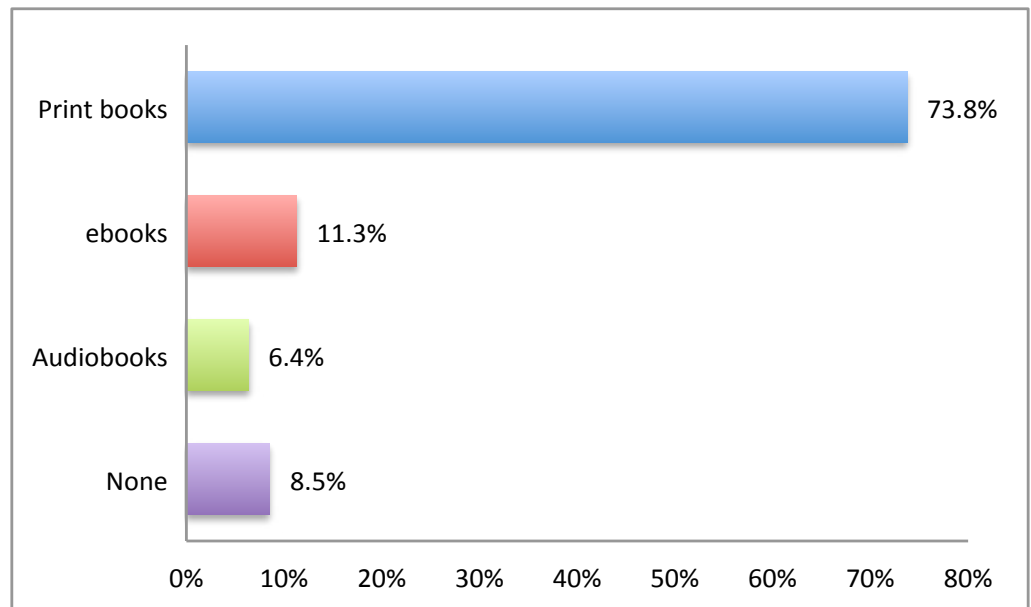
Question: How many times have you visited the public library (in person or online) in the last month?

N=784

⁵ Publications, ReVue. 'CULC/CBUC: Trend Report - Canadian Urban Libraries Council/Conseil Des Bibliothèques Urbaines Du Canada'. *Culc.ca*. N.p., 2015. Web. 22 Sept. 2015.

Ebook borrowing remains relatively constant for book buyers. In 2012, 12% of respondents said they had borrowed an ebook from the library in the prior month as compared to 11% in 2015. The majority of respondents (74%) borrowed a print book.

FORMATS BORROWED FROM THE LIBRARY



Question: How many of each did you check out in the last month?
N=433

Conclusion

The biggest shift we have seen over the past two years is the movement to online book buying. While Canada still lags behind the U.S. and the U.K., the 16% increase between 2013 and 2015 is notable. Regardless of where book buyers are making purchases, we find that the average number of purchases per buyer is remaining relatively constant over the past several years (2.8 units per month) with those who buy both digitally and in print purchasing the largest average number of books (3.5 units per month).

Next BookNet Canada will be releasing a study focusing on discoverability – how do book buyers find out about their next purchase. Make sure you are signed up for our free eNews to get more information on this and our other research endeavours.

You can subscribe to eNews at booknetcanada.ca/newsletter-sign-up.

APPENDIX A – (DEMOGRAPHICS CHANNEL RESPONDENT)

Gender	
Male	48.1%
Female	51.9%
Location	
City	48.9%
Suburban	29.1%
Rural	22.1%
Education	
Less high school	0.5%
High school	16.3%
Some post-secondary	14.8%
College or university	49.0%
Graduate degree	18.0%
Prefer not to answer	0.8%
Other	0.6%
Employment	
Employed full-time	39.0%
Employed part-time	10.6%
Self employed	8.4%
Not employed	4.6%
Retired	24.6%
Student	5.0%
Homemaker	4.8%
Prefer not to answer	1.3%
Other	1.7%
Status	
Married	45.2%
Single (never married)	27.0%
Living with partner	12.8%
Separated	2.8%
Divorced	7.9%
Widowed	3.8%
Other	0.3%
Prefer not to say	0.3%

Acknowledgements

ABOUT BOOKNET CANADA

BookNet Canada is a non-profit organization that develops technology, standards, and education to serve the Canadian book industry. Founded in 2002 to address systemic challenges in the industry, BookNet Canada supports publishing companies, booksellers, wholesalers, distributors, sales agents, and libraries across the country.

BookNet Canada's services and research help companies promote and sell books, streamline workflows, and analyze and adapt to a rapidly changing market. BookNet Canada sets technology standards and educates organizations about how to apply them, performs market research, and tracks 85% of all Canadian English-language print book sales through BNC SalesData.

Industry-led and partially funded by the Department of Canadian Heritage, BookNet Canada has become, as *The Globe and Mail* puts it, "the book industry's supply-chain nerve centre."

We acknowledge the financial support of the Government of Canada through the Canada Book Fund (CBF) for this project / *Nous reconnaissons l'appui financier du gouvernement du Canada par l'entremise du Fonds du livre du Canada (FLC) pour ce projet*



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A NEW STUDY COMING SOON

WHERE CANADIANS BUY BOOKS: TRENDS IN DISCOVERABILITY AND BUYING HABITS

BookNet Canada will soon be releasing a new study focusing on discoverability.

- How do book buyers find out about their next purchase?
- What kind of discoverability trends can we see?
- Who are book buyers? What do their differing profiles look like?
- Which subject areas are being purchased through which channels?

Keep up to date on new releases, sign up for eNews:

booknetcanada.ca/newsletter-sign-up