QUANTA: THE GLOBAL BOOK MARKET

Jo Henry
VP Insight & Analytics
Nielsen Book
NIELSEN Q4 2015 CONSUMER CONFIDENCE INDEX

Source: Nielsen Global Survey of Consumer Confidence & Spending Intentions, Q4 2015
Q4 2015 vs. Q1 2015

REGIONAL CONSUMER CONFIDENCE INDEX SCORES

NORTH AMERICA: -6
LATIN AMERICA: -3
EUROPE: +4
MIDDLE EAST / AFRICA: -6
ASIA PACIFIC: NO CHANGE

Source: Nielsen Global Survey of Consumer Confidence & Spending Intentions, Q4 2015
NIELSEN BOOKSCAN INTERNATIONAL TERRITORIES

2014

Source: Nielsen BookScan, OpenBook

* China from OB – online and physical stores
**like-for-like
NIELSEN BOOKSCAN INTERNATIONAL TERRITORIES

2015

Source: Nielsen BookScan, OpenBook, GfK

* China from OB – online and physical stores
** like-for-like
INTERNATIONAL CATEGORY MARKET SHARE

Source: Nielsen BookScan, OpenBook, GfK; volume share, * Italy, SA, Spain markets without Academic and School Texts,
CATEGORY VOLUME GROWTH 2015 VS 2014

Source: Nielsen BookScan, GfK
TRENDS IN THE UK
### WHAT’S HAPPENED TO YA?

<table>
<thead>
<tr>
<th>#</th>
<th>Title</th>
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<th>Imprint</th>
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<th>2013 Sales</th>
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<td>RATH TOM</td>
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*Source: Nielsen BookScan US 2013*
## WHAT'S HAPPENED TO YA?

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<td>RANDOM HOUSE DISNEY</td>
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Source: Nielsen BookScan US 2013
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<th>#</th>
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<th>Imprint</th>
<th>Pub Date</th>
<th>2015 Sales</th>
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<td>1</td>
<td>GO SET A WATCHMAN</td>
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Source: Nielsen BookScan US 2013
# E-BOOK SHARE OF BOOK PURCHASES (VOLUME)

## Book Categories

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<th>Percentage</th>
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<td>SFF/Horror</td>
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<td>Crime/Thriller</td>
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<tr>
<td></td>
<td>General Fiction</td>
</tr>
<tr>
<td>20-25%</td>
<td>Fitness/Diet</td>
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<tr>
<td></td>
<td>Self Help</td>
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<tr>
<td></td>
<td>Business/IT</td>
</tr>
<tr>
<td></td>
<td>Biography</td>
</tr>
<tr>
<td>10-19%</td>
<td>Religion/MBS</td>
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<td>Reference</td>
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<tr>
<td></td>
<td>Humour</td>
</tr>
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<td>History</td>
</tr>
<tr>
<td></td>
<td>Graphic Novel</td>
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<td></td>
<td>Social Science</td>
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<td></td>
<td>Sport</td>
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<td></td>
<td>Cookery</td>
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<td>Science</td>
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<td>&lt;10%</td>
<td>The Arts</td>
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<td>Maps/Guides</td>
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<td>Art/Crafts</td>
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**E-Books Still Gaining**

**Print Book See Resurgence**

Source: Nielsen Books & Consumers UK 2015
EST. PURCHASES AMAZON/SELF-PUB E-BOOKS* (VOLUME)

2012: 64m  
2013: 85m  
2014: 91m  
2015: 95m

Average price paid - 1%  
2015 vs 2012

Source: Nielsen Books & Consumers UK 2015

*based on manual coding of authors/publishers by Nielsen
DEVICE OWNERSHIP AMONG BOOK BUYERS

Source: Nielsen Books & Consumers UK 2015
THE AUDIOBOOK MARKET

Source: Nielsen Books & Consumers UK 2015
CHANNEL SHARE PRINT BOOKS (VOLUME)

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<th>2015</th>
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<tr>
<td>Books</td>
<td>28%</td>
<td>31%</td>
</tr>
<tr>
<td>Online</td>
<td>42%</td>
<td>42%</td>
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<tr>
<td>Stores</td>
<td>14%</td>
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WHY BUY IN A BOOKSHOP?

Chain
- Convenience
- Selection
- Service
- Happenstance
- Atmosphere
- Price

Indie
- Selection
- Convenience
- Service
- Atmosphere
- Happenstance
- Support

Source: Nielsen Books & Consumers UK 2015
WHERE CAN BOOK BUYERS BE FOUND?

- Blogs/online forums: 27%
- Magazines: 39%
- Video sharing: 48%
- Newspapers: 60%
- Social media: 63%

Source: Nielsen Books & Consumers UK 2015
TRENDS IN BOOK DISCOVERY

- Browse/search: 48%
- Author/series b4: 37%
- Recomm/review: 12%
- Shop window: 44%
- Read book before: 13%
- Requested: 10%
- Bestseller list: Other online: 15%
- Follow on social: 11%
- Study/work need:
- Adaptation:

Source: Nielsen Books & Consumers UK 2015
BOOKS BOUGHT FOR OTHERS (VOLUME)

Source: Nielsen Books & Consumers UK

NB. Adjusted for younger children’s books genres claimed to be for adult
FORTHCOMING EVENTS & RESEARCH PROJECTS

Children’s Summit at the LBF – 9.30-12.30 14th April

Audiobooks Deep-Dive – April/May 2016
Gifting Report – May/June 2016
Children’s Book Market – June/July 2016
Digital consumers – TBC
The Market for Mindfulness – TBC

REPORTS AVAILABLE:
Students Information Sources 2016; Travel market 2015;
Children’s market 2015; Indian Book Market 2015;
Cookery consumers 2014; Italian Book Buyers 2014;
Digital Consumer 2014
THANK YOU

Sources:

- Nielsen BookScan – US, UK, Ireland, Italy, Spain, Republic of South Africa, Australia, New Zealand, India and Brazil
- Openbook China
- Nielsen Books & Consumers survey and consumer deep dives