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## Press Release

# NIELSEN BOOKS & CONSUMER SURVEY RESULTS RELEASED – LOOKING AT CONSUMER PURCHASING BEHAVIOUR IN 2014

**London, Wednesday 25 February 2015**

Today, Nielsen Book hosted its annual conference, now re-named BookInsights, which presented the audience with a wide variety of consumer data, including the path to purchase, working with big data and measuring word of mouth. We also looked at how books fit into the entertainment market, YA fanship and the book and film crossover. There was a presentation of our findings on consumer response to book covers, and a panel discussion completed the day's formal presentations.

One of the key highlights of today's conference was the presentation of the results of the latest findings from the 2014 UK Books & Consumer Survey. Steve Bohme, Nielsen Book's UK Consumer Research Director, commented: *"In 2014, we saw an increasing number of readers engaging with digital reading and media, but the proportion of book buyers reading printed books, newspapers and magazines has stayed level over the last three years. While digital helped grow a number of key market sectors, there was lower spending in 2014 than 2013 on genres such as Crime, Romance, Historical Fiction, Annuals, Cookery, Health/Fitness and Travel."*

The Nielsen Books & Consumers™ UK survey monitors the consumer book market in detail, collecting information on consumer book purchasing of both print and e-books through all sources from 36,000 book buyers aged 13-84 in the UK.

Some of this year's highlights revealed are:

### **Devices and formats**

- Nielsen's UK Books & Consumers survey reveals the extent to which UK book buyers are increasingly 'digital', with 56% owning tablets by the end of 2014 (compared to 41% in Q4 2013), 25% owning e-readers and 84% (up from 76%) owning either tablet, e-reader or smartphone.
- The continuing resilience of printed formats is echoed by a shallower (1-2%) decrease in sales of printed books through Nielsen BookScan's UK TCM in 2014 than 2013. With

consumer purchases of digital formats continuing to rise, overall spending on 'p' and 'e' books by UK consumers rose by 4% in 2014, to £2.2bn.

- The overall rise in book spend in 2014 cancelled out the decrease recorded in 2013, following the exceptional impact of *Fifty Shades* in 2012. However, double digit decreases in the volume of printed books bought in 2013 means that, even with digital added, there were fewer books bought altogether in 2014 than 2012.
- With book buyers increasingly owning digital devices, and print sales continuing to fall (albeit to a lesser extent than in recent years), the share of book purchases taken by e-books continued to rise in 2014.

### **Categories & genres**

- Overall, e-books accounted for 30% of book units purchased in 2014, and while the e-book share continued to be higher in Adult Fiction than other sectors – at approaching half of all volume purchases – growth in e-books was faster in the Non-Fiction and Children's categories in 2014.
- Even so, migration to digital still remains relatively limited in books for 0-12s and in Non-Fiction genres such as art and travel. Meanwhile, there are some signs that the migration to e-books in some of the most digital genres, such as romance and fantasy, is slowing.
- Purchasing of e-books helped drive overall spending on Children's books up by 15% in 2014, although that sector also saw substantial (9%) growth in print sales through the UK TCM. Increased spending on e-books helped turn a 4% decrease in UK TCM print sales into a 4% rise in spending in adult Non-Fiction overall. However, spending on Adult Fiction remained flat, with growth in e-books balancing out the decrease for print.
- Purchases for those aged 13-34 drove the growth in book spend in 2014, with YA Fiction one of the strongest performing genres. 2014 also saw increases in combined 'e' and 'p' spending on General Adult Fiction, Science Fiction Fantasy, Graphic Novels, Biography, History, Arts, Science and Mind, Body & Spirit, as well as for Younger Children's Fiction, Children's Non-Fiction, Picture and Early Learning books.

### **Channels**

- The continuing migration to digital helped e-tailers gain share of book spending in all main categories in 2014, with online spending overtaking in-store spending on books for the first time.
- However, bookshops gained share in the printed market, and in-store remains ahead of e-tail in Children's books, the gift market, among lighter buyers, for impulse purchases and where the channel is chosen for the selection of books available and for a better shopping experience.

### **Discovery & purchase influences**

- While impulse purchasing remains a key part of in-store shopping for books, browsing/searching more generally continued to be the leading means of discovery in Adult Non-Fiction and for books for 0-12s in 2014, and was second only to previous readership of author/series as a source of awareness in Adult Fiction.
- In the YA market, TV/film adaptations gained in importance for discovery in 2014, and was the second most important driver of awareness in that sector.

## **Gifting**

- While spending on digital formats as gifts rose in 2014, this remains a small part of the gift market, and hasn't made up for a shortfall in gifting of print books since 2012.
- Overall, the proportion of books bought for gift occasions fell from a quarter to a fifth between 2012 and 2014, with decreases in both Adult and Children's markets, particularly in purchases for Christmas, and more generally in books as gifts for spouses, friend's children and more distant relatives.

## **Notes for Editors:**

### **Data sources:**

Nielsen Book's UK Books & Consumer Survey tracks consumer book and e-book purchasing monthly via online interviews from a nationally representative sample.

Nielsen BookScan is the world's largest book retail sales monitoring and analysis service, data is collected from 6,500 retailers weekly from EPOS systems and represents 90% of the UK market (Total Consumer Market).

Nielsen's *Understanding The UK Digital Book Consumer* is an annual online survey which monitors digital engagement among UK adults including their habits and attitudes and uses a nationally representative sample of 2000 adults.

### **For Further information:**

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### **About Nielsen Book**

Nielsen Book is a leading provider of search, discovery, commerce, consumer research and retail sales analysis services globally. Nielsen runs the Registration Agencies (ISBN and SAN Agencies for UK & Ireland, ISTC), provides search and discovery products through its Nielsen BookData product range, electronic trading via Nielsen BookNet and PubEasy services, retail sales analysis via Nielsen BookScan and consumer research through its Books and Consumers Survey and bespoke research services.

Nielsen acquired the business Intelligence and commerce solutions products: PubTrack™ Digital, PubTrack™ Christian, PubTrack™ Higher-Ed, and Books & Consumers, Global Ebook Monitor and custom research. Commerce Solutions products: PubEasy® and Pubnet® in 2013. This acquisition enhances Nielsen Book's solutions portfolio and brings deeper insights and improved efficiencies to the global book industry.

Nielsen Book employs 100 staff in the UK. The company is wholly owned by Nielsen. For more information, please visit: [www.nielsenbook.co.uk](http://www.nielsenbook.co.uk)

### **About Nielsen**

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