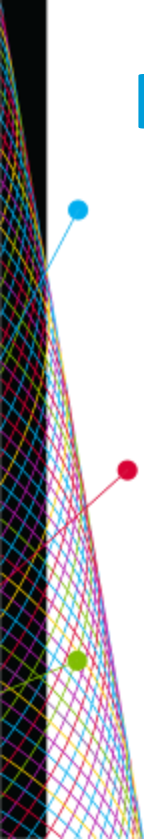




# CONSUMER BOOK BUYING , IN DIGITAL AND PRINT

April 2015

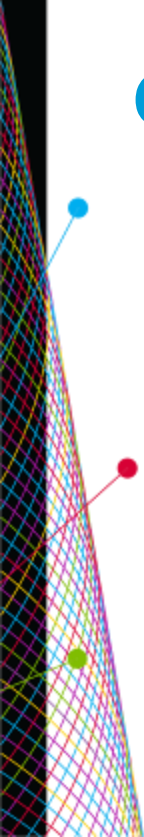
# INTRODUCTION



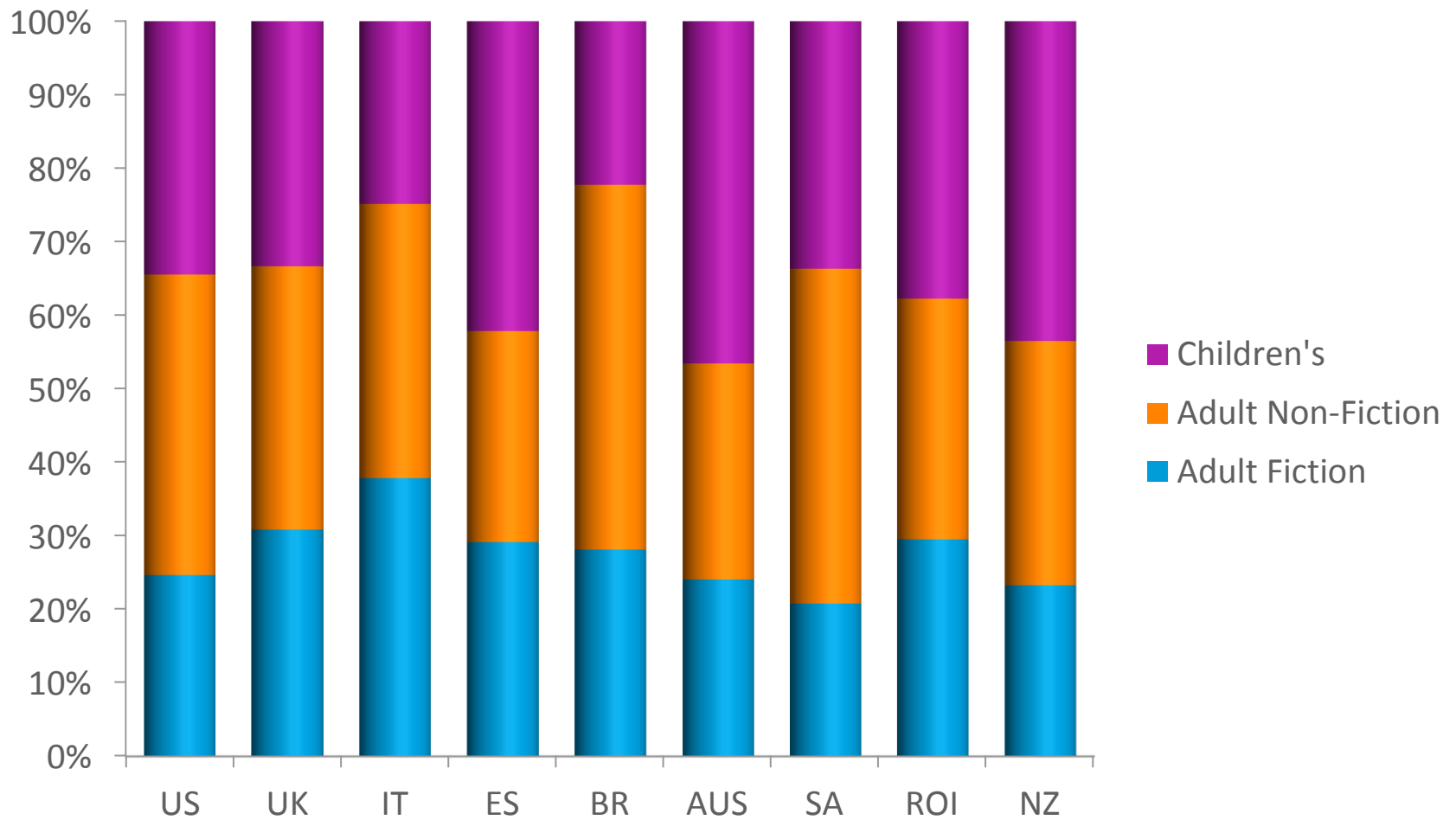
# Introduction & methodology

- Nielsen Book Research measures the global book market through its Bookscan sales tracking, and through ongoing and ad hoc consumer research.
- Nielsen has measured sales of books in Italy via Bookscan since 2007, and in 2014, for the first time, undertook The Italian Book Buyer Survey a consumer research study to benchmark the book buying habits and attitudes among Italian consumers.
- The Italian research was undertaken using an online survey with 2000 Online Italian consumers aged 18-64, using a sample that was nationally representative of this age group by sex, age band and broad region.
- Fieldwork was undertaken in November-December 2014. The questionnaire used is provided in a separate document.

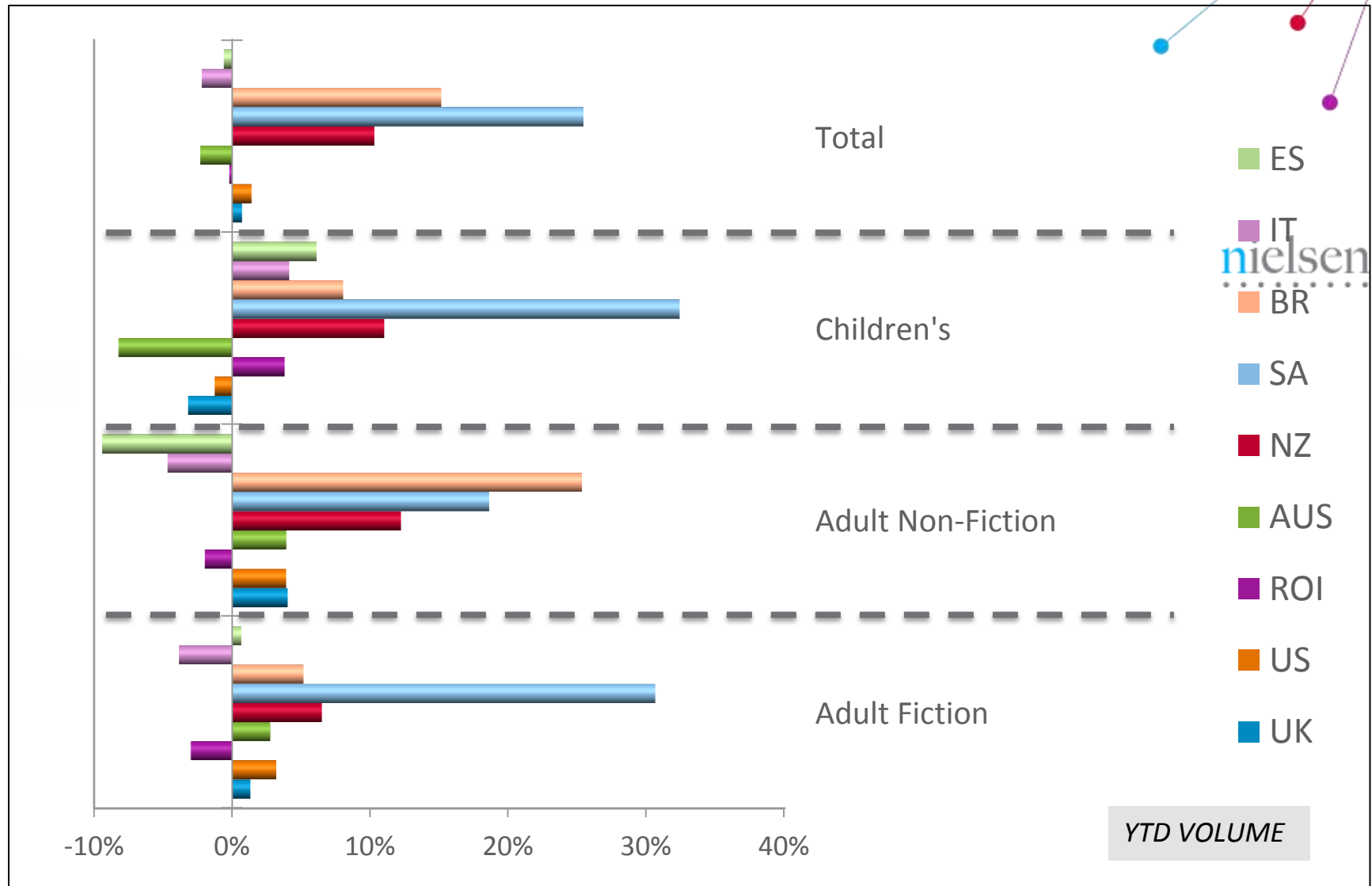
# Global Markets



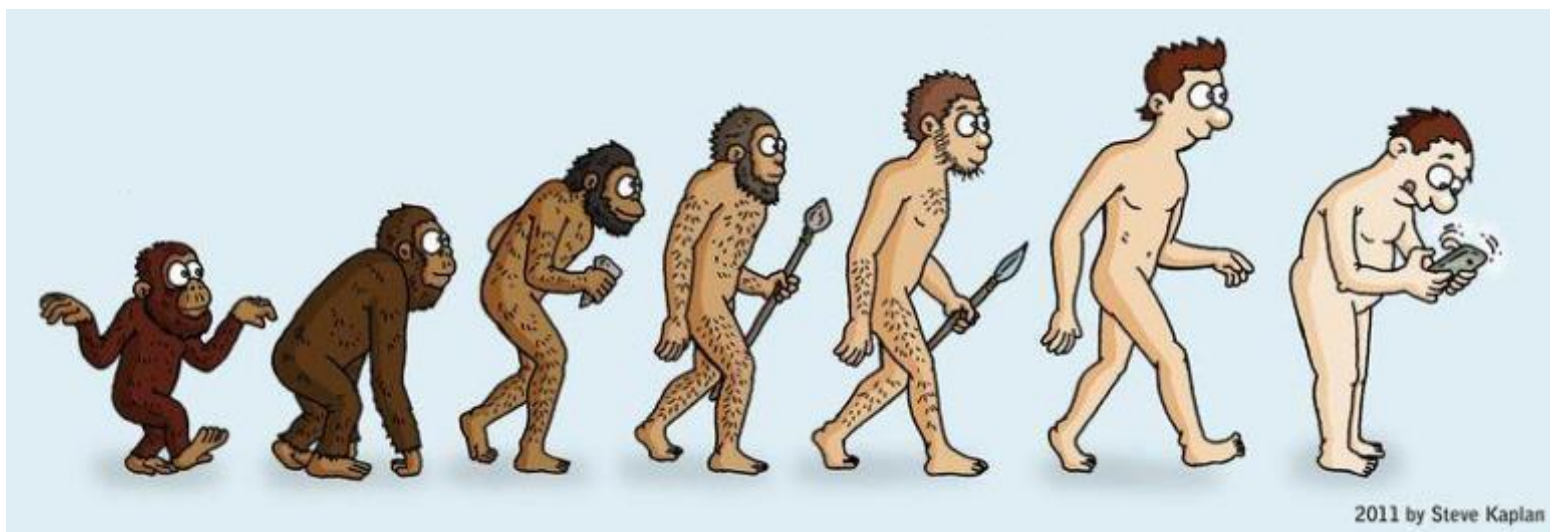
# Markets by Genre



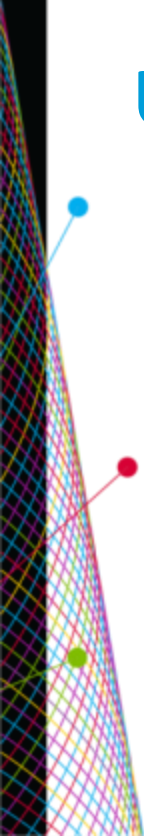
# International Genre Performance



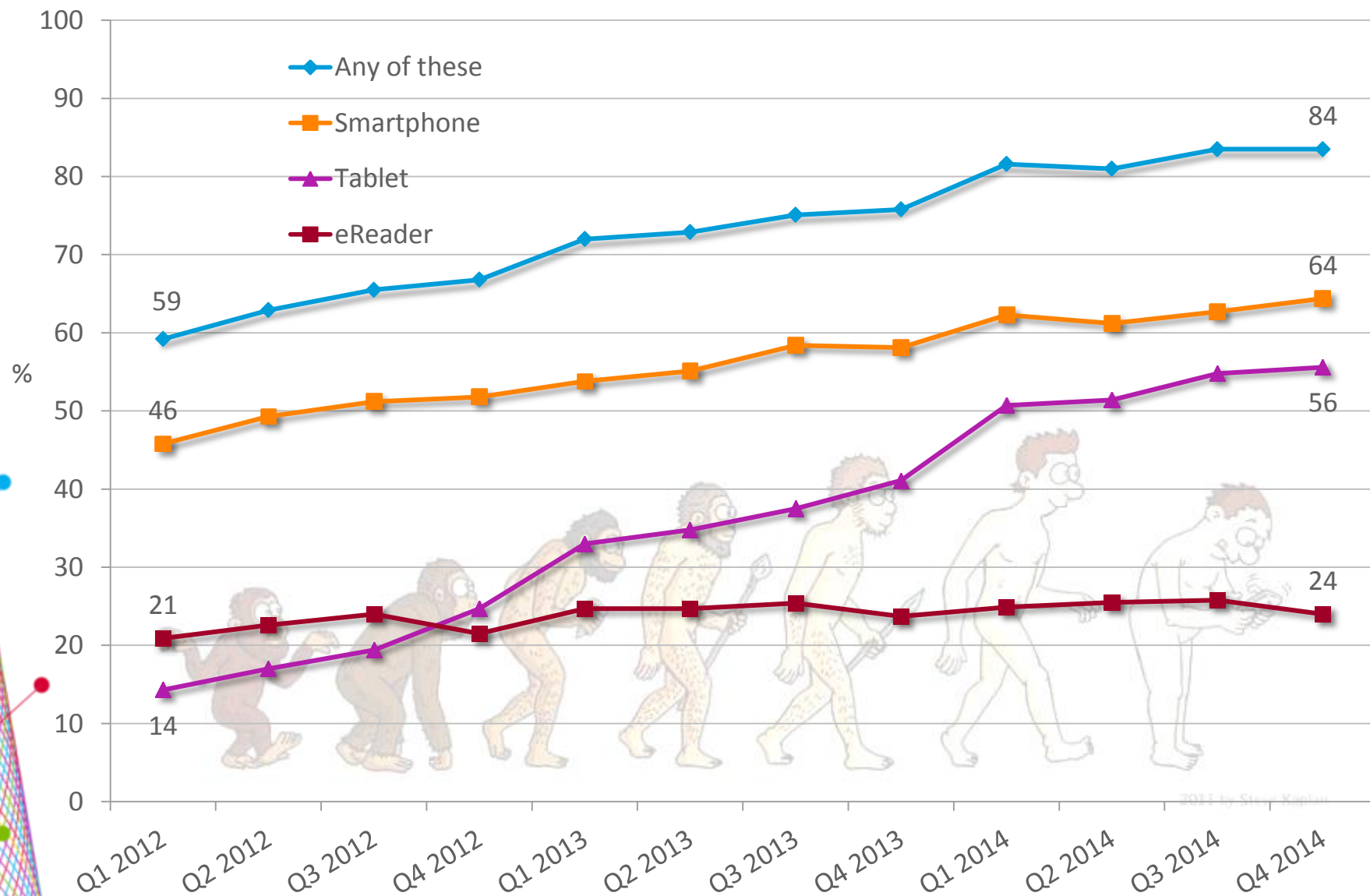
# E-VOLUTION



# United Kingdom



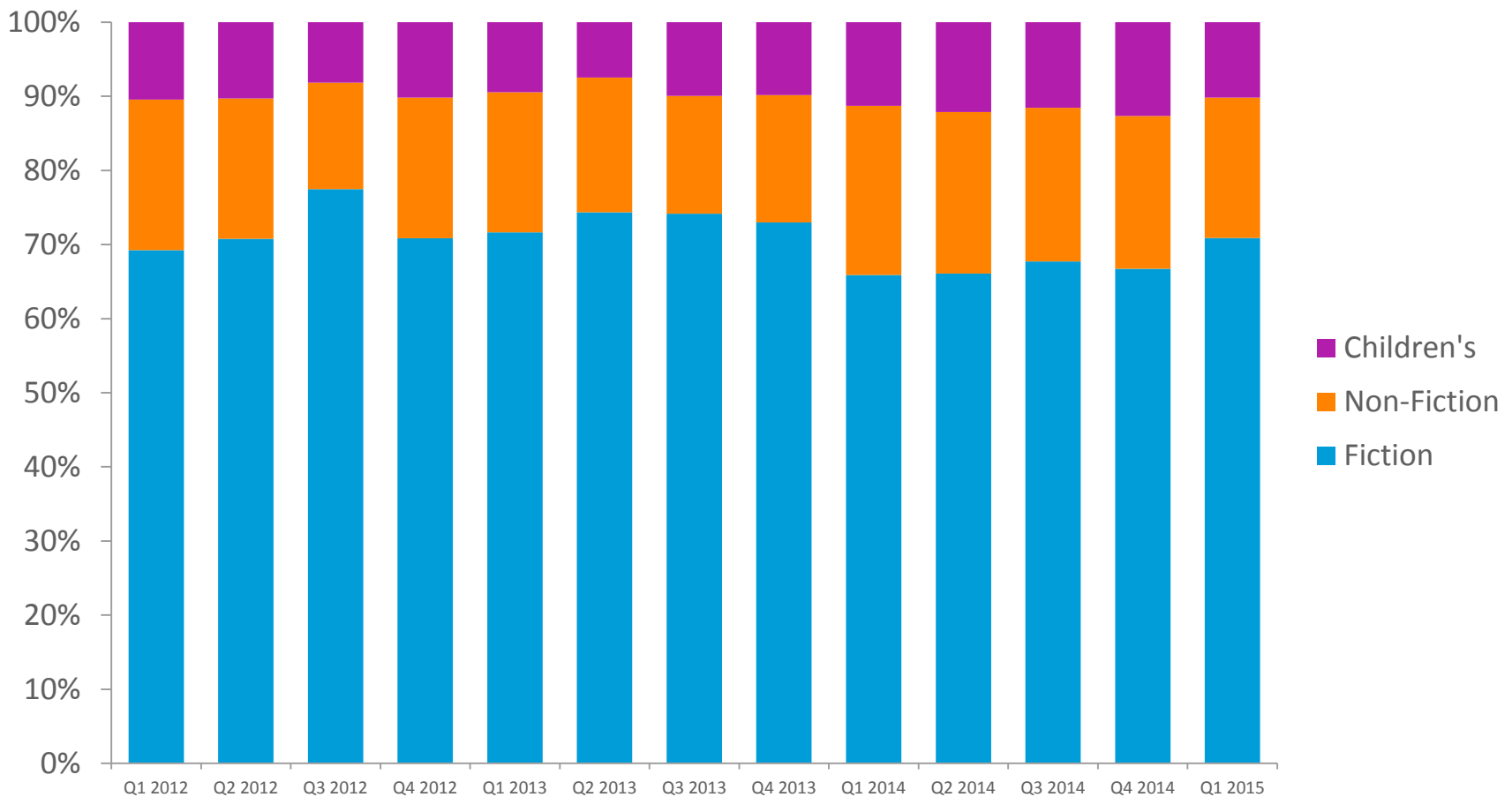
# E-volution of device ownership (% of book buyers)



# THE LATEST ON DIGITAL IN THE UK

70% of e-books bought in Q1 were Fiction.

Quarterly category breakdown of e-book sales

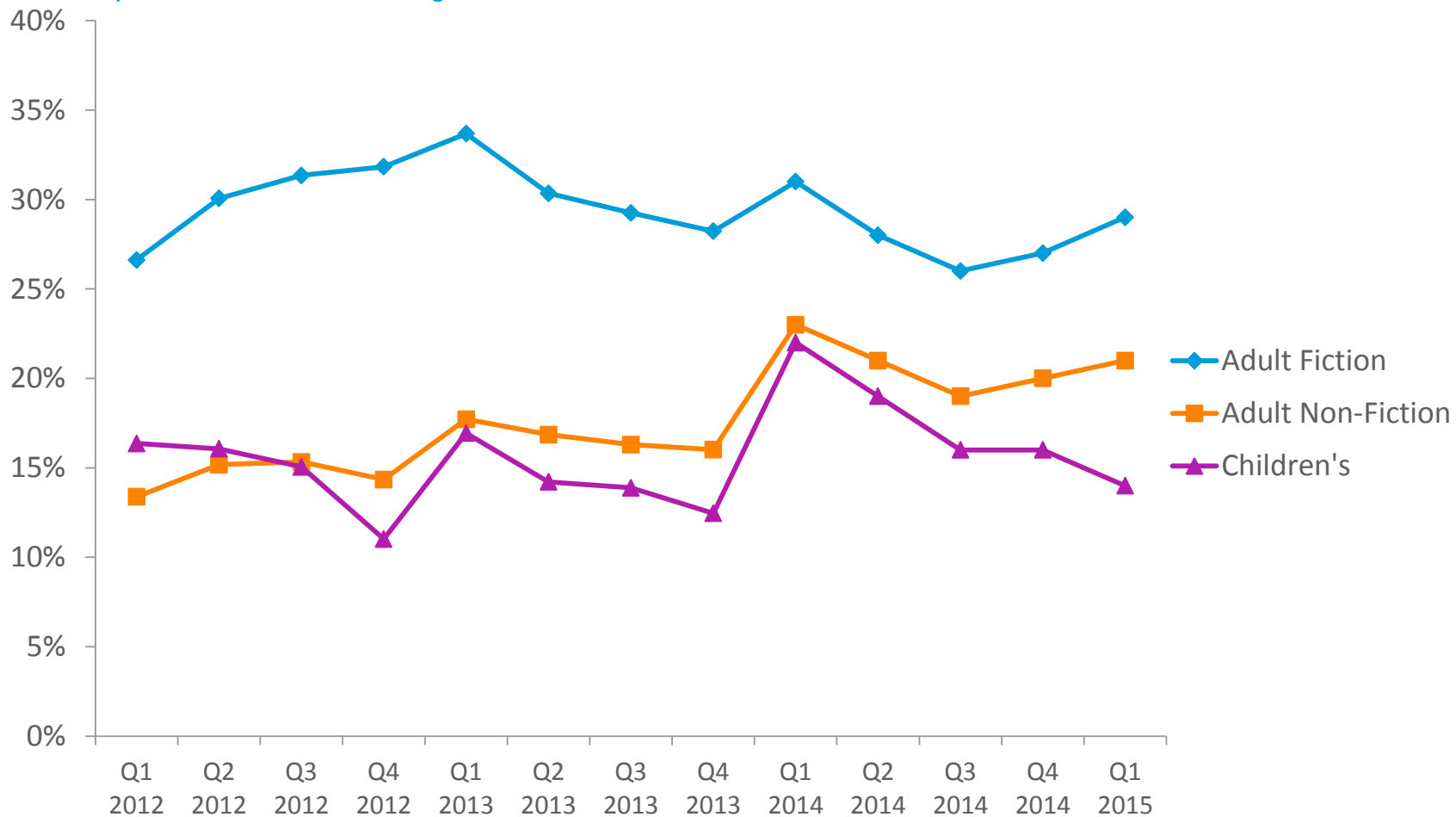


# United States

# THE LATEST ON DIGITAL IN THE US

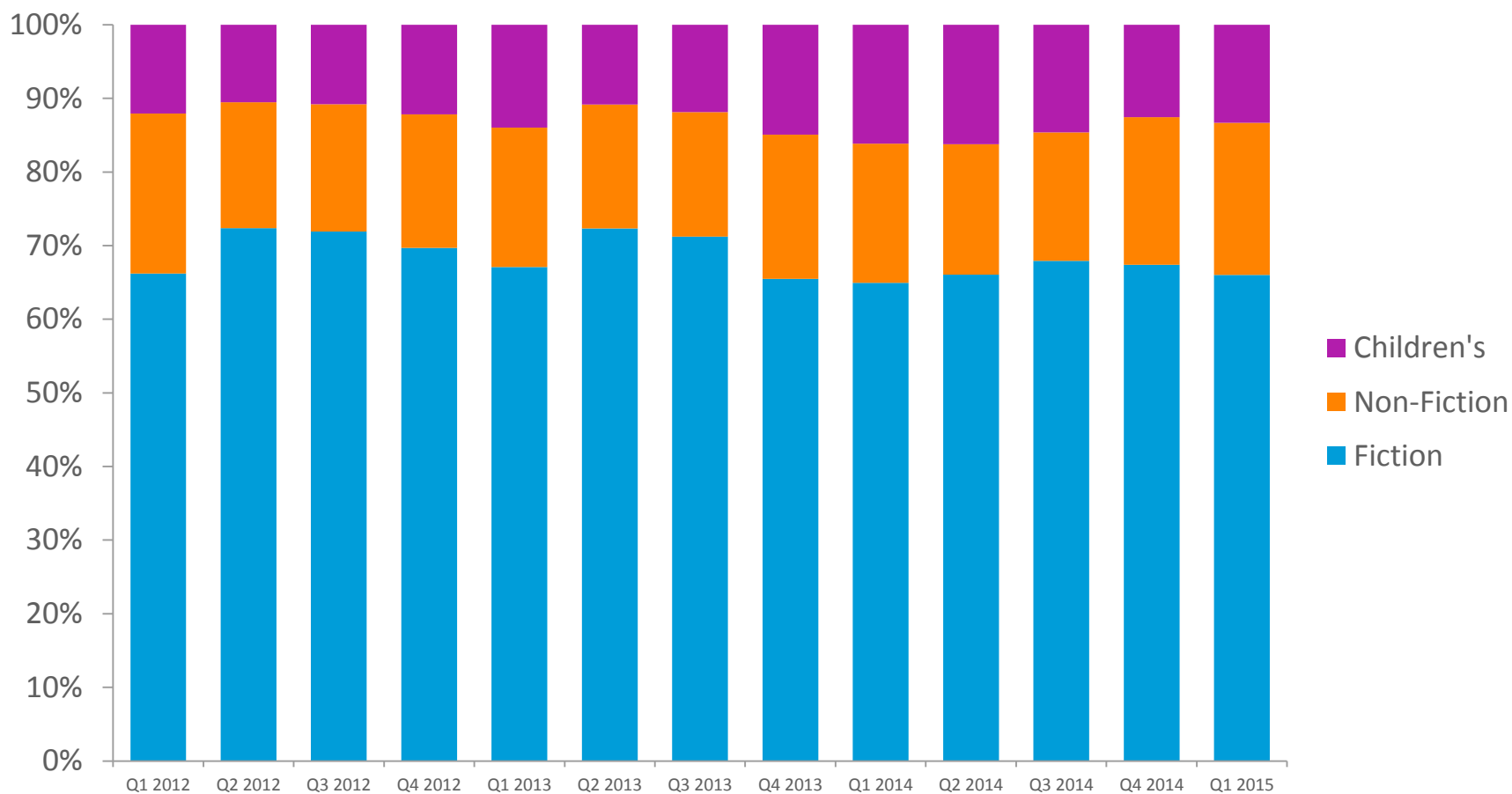
Overall, in Q1 2015 20% of books were bought as e-books.

Quarterly e-book share of broad categories

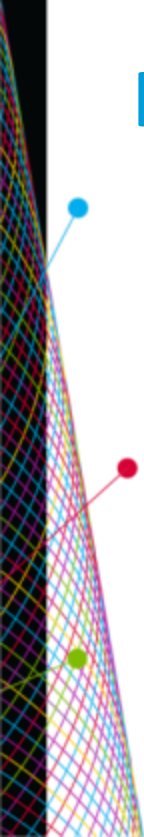


# E-BOOKS IN THE US

Quarterly category breakdown of e-book sales

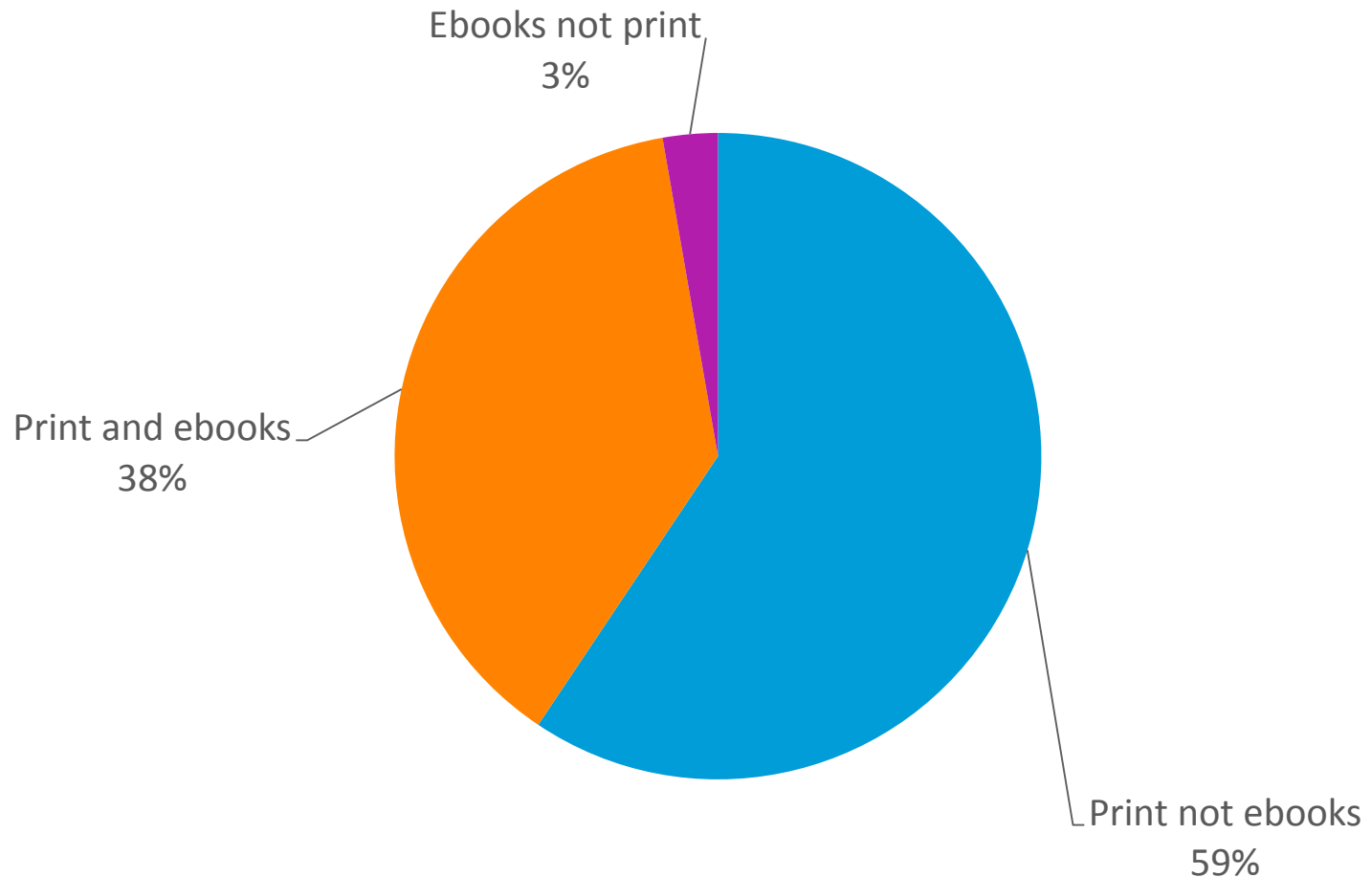


Italy



97% of Italians who bought books in 2014 claim to buy printed formats and 41% buy ebooks

Book formats bought new in last 12 months, for self or others

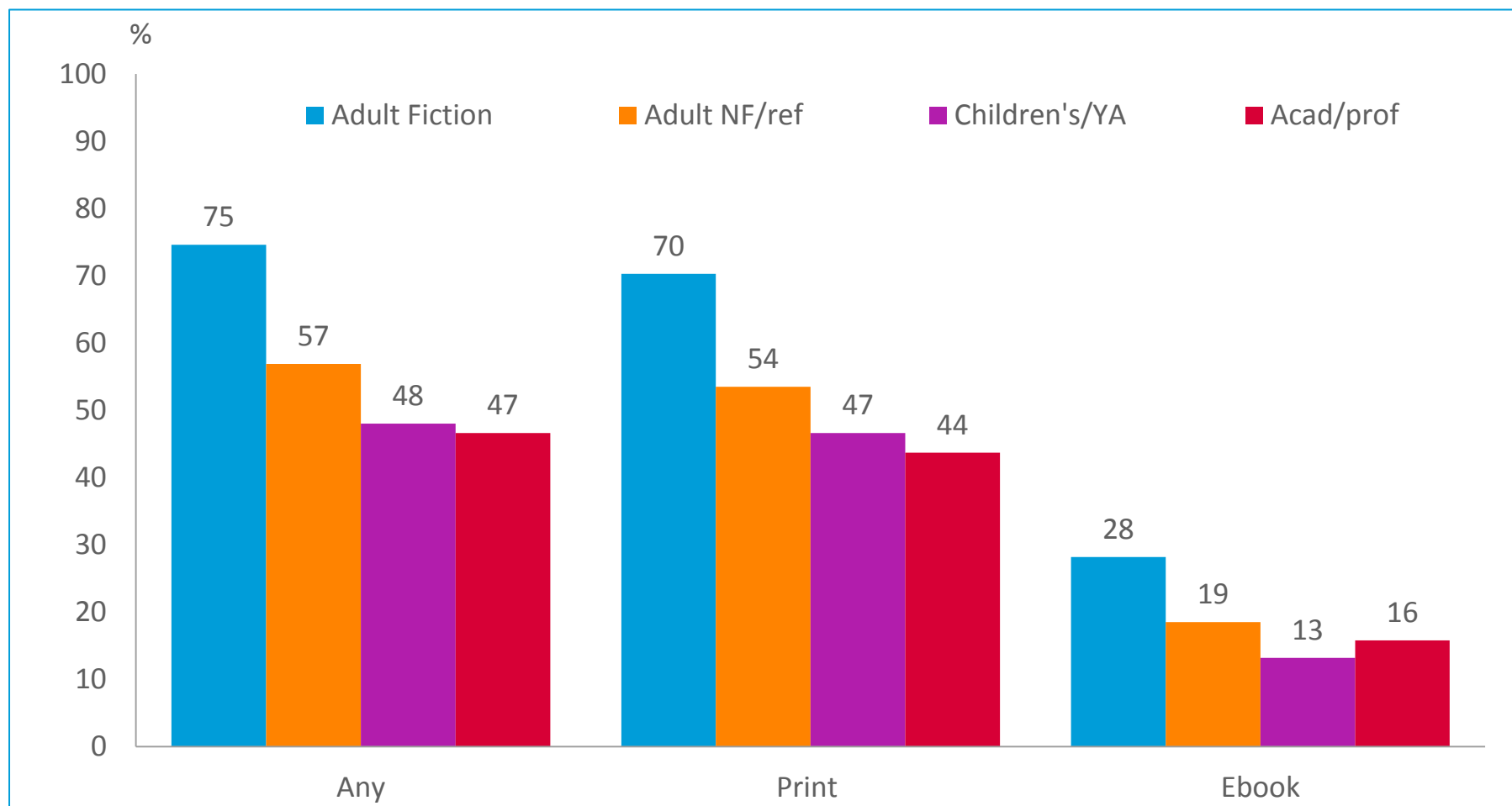


Base: Online Italian consumers aged 18-64 who bought books

Source: Italian Book Buyer Survey 2014 © Nielsen 2015

Three quarters of Italians aged 18-64 had bought adult fiction books in the previous 12 months, while 57% had bought non-fiction/reference, and just under half had bought children's/young adult (YA) books and academic/professional titles. Most had bought these categories in print, while over a quarter had bought ebook fiction and a fifth ebook non-fiction

### Book types bought in last 12 months, by format

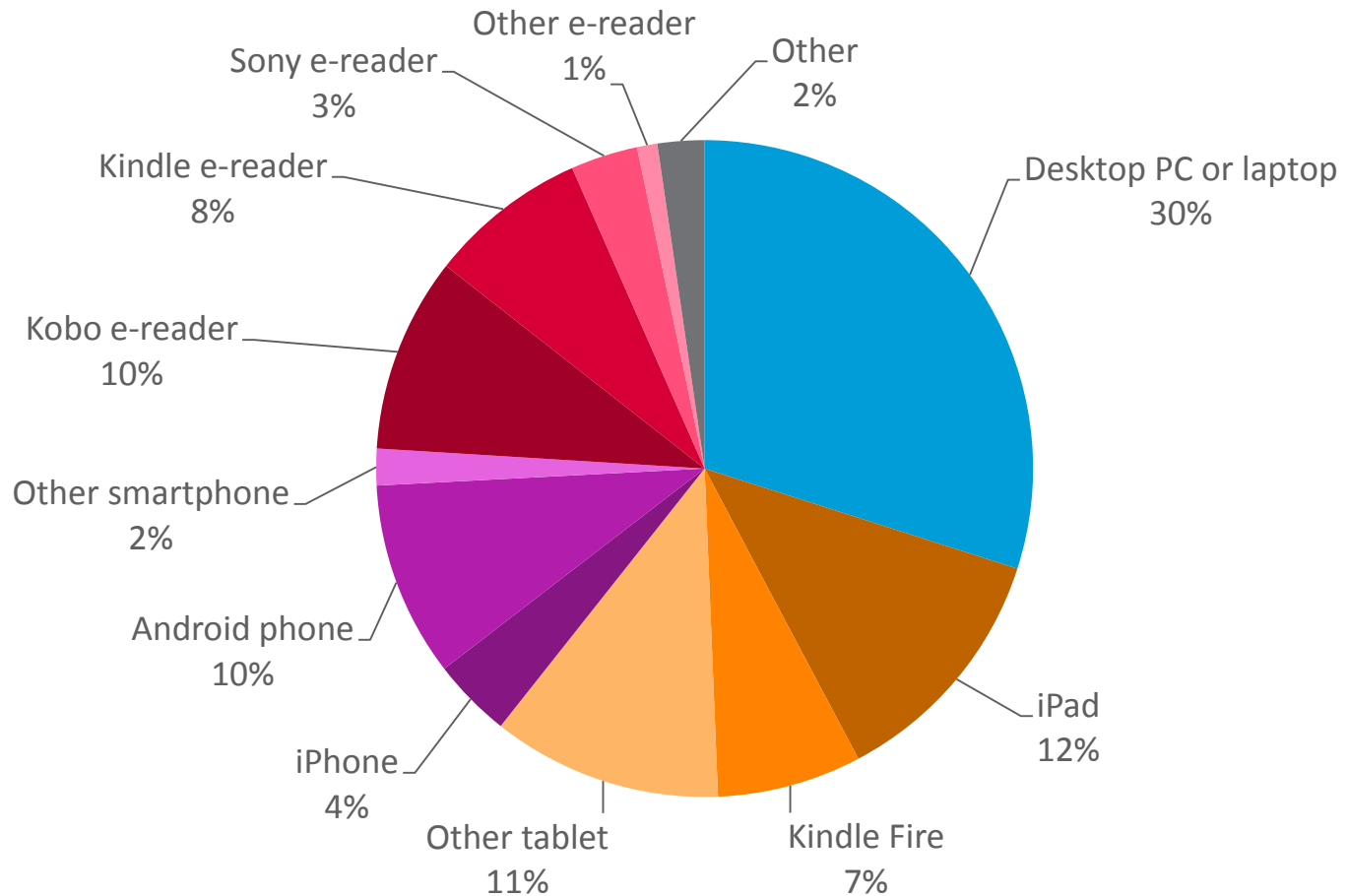


Base: Online Italian consumers aged 18-64 who bought books

Source: Italian Book Buyer Survey 2014 © Nielsen 2015

30% of downloaders most commonly read ebooks on a PC/laptop, with the same proportion tending to use a tablet (most commonly an iPad). A fifth used a dedicated e-reader most for e-reading (with Kobo just ahead of Kindle), while one in six read most on a phone

### Device used most often for reading ebooks

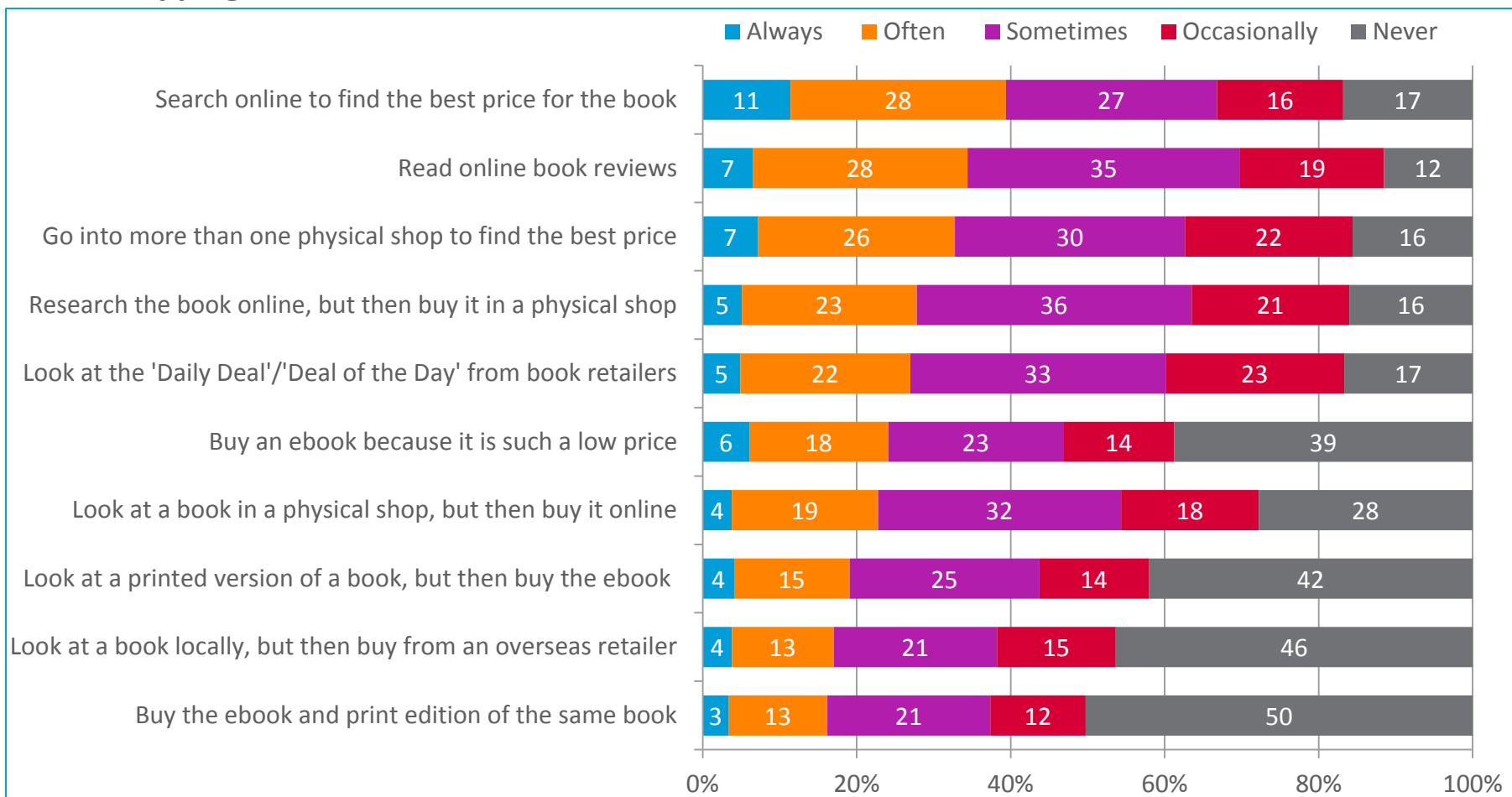




# BOOK SHOPPING HABITS

Two-in-five Italian book buyers always/often search online for the best book prices when buying books, with a third shopping often around in-store. A third always/often read online book reviews when buying books, while a quarter often buy ebooks because they are such a low price. A sixth often buy both print and ebook editions of the same book. More often research online and buy in-store (28%) than look in-store before buying online (23%)

## Book shopping habits



Base: Online Italian consumers aged 18-64 who bought books

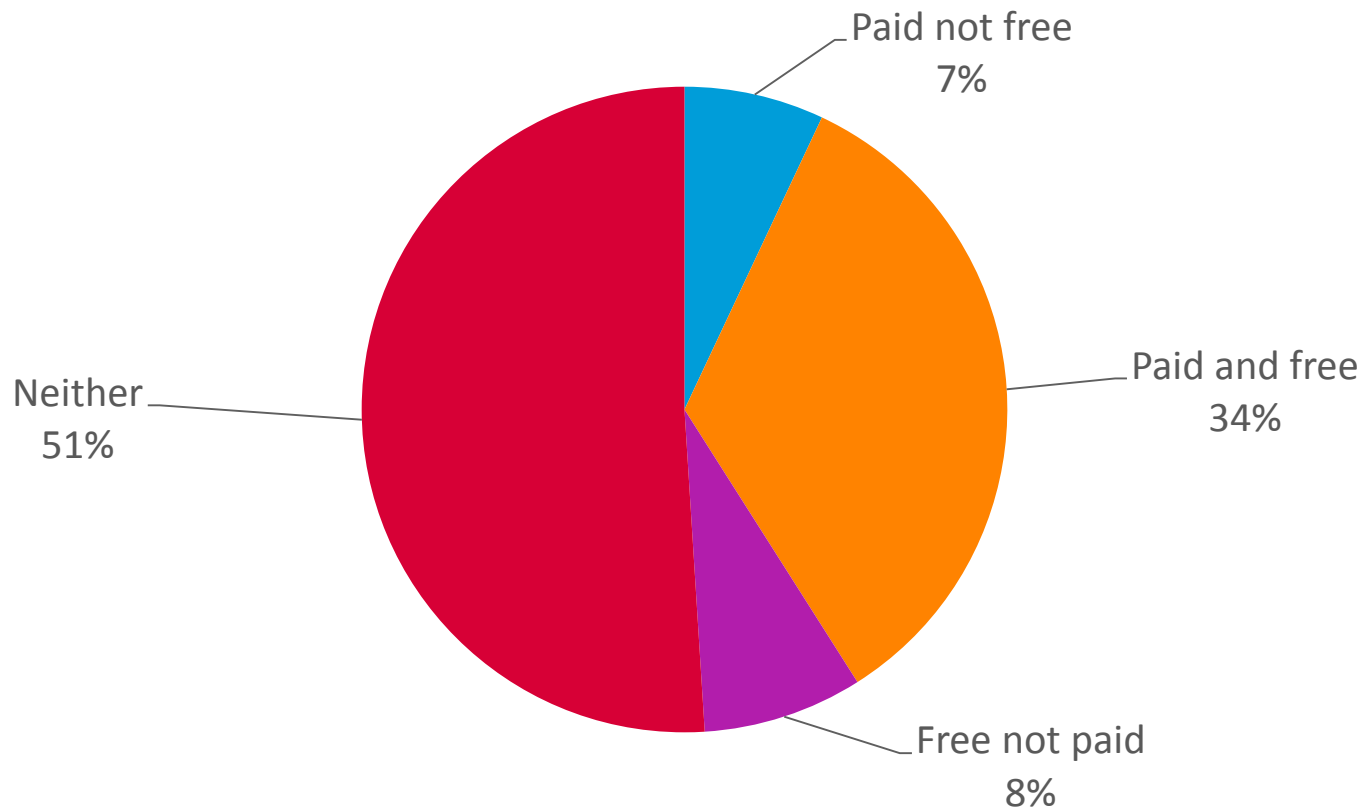
Source: Italian Book Buyer Survey 2014 © Nielsen 2015

# EBOOK DOWNLOADING: PAID FOR & FREE



While just over a third of Italians had bought ebooks in the previous 12 months, an additional 8% had downloaded them for free, so that 49% had downloaded ebooks altogether – mostly obtaining a mixture of free and paid-for titles

### Ebook downloading in last 12 months: paid vs free

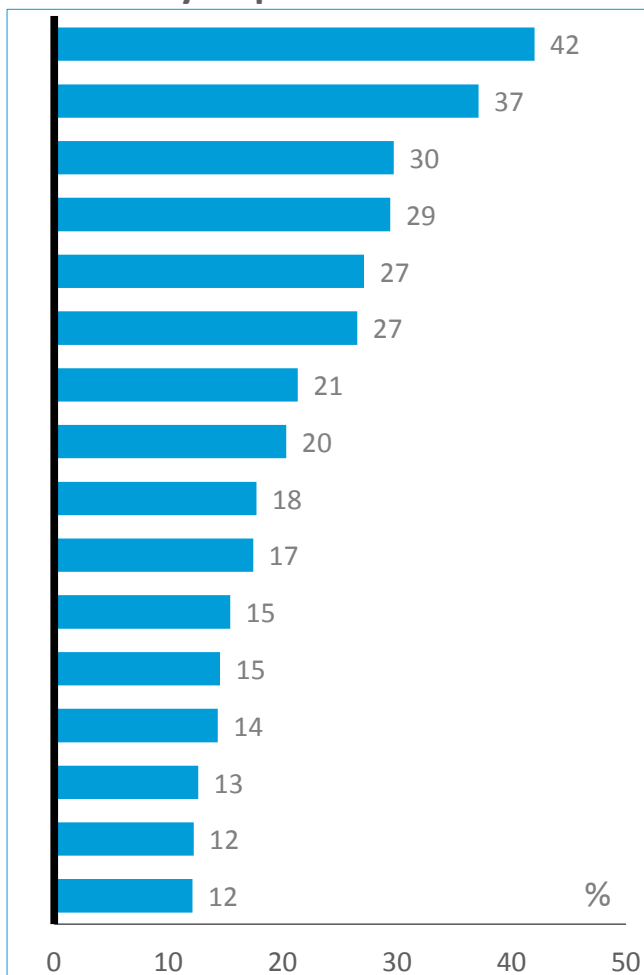




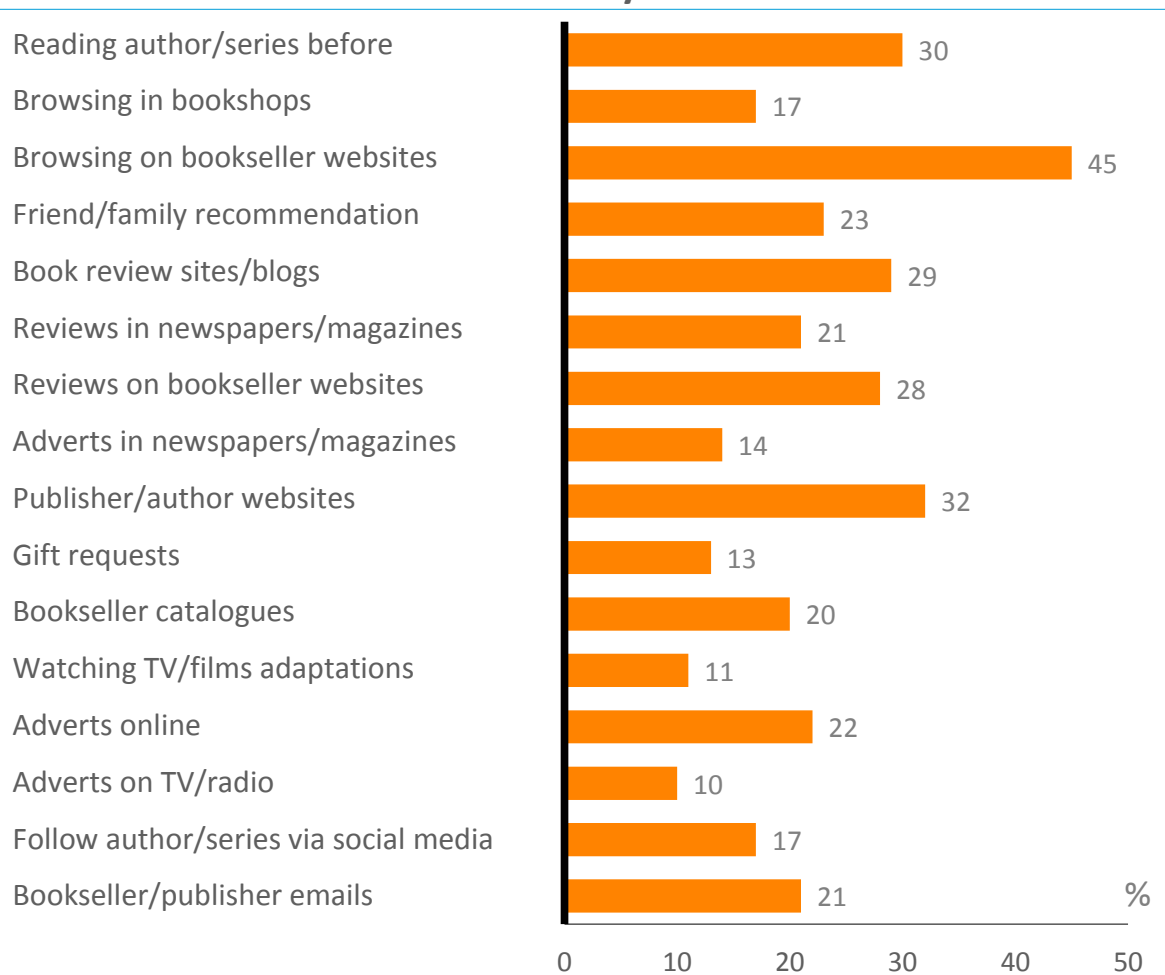
## BOOK DISCOVERY

Previous readership of author/series and browsing in-store were the most widespread methods of discovery for print books, while browsing on bookseller and publisher/author websites were the leading methods of ebook discovery. Personal recommendations and newspapers/magazines were more important sources of discovery for print than ebooks; online reviews and adverts, and bookseller/publisher emails, were more important for ebooks than print

### Discovery of print



### Discovery of ebooks



Base: Online Italian consumers aged 18-64 buying that format

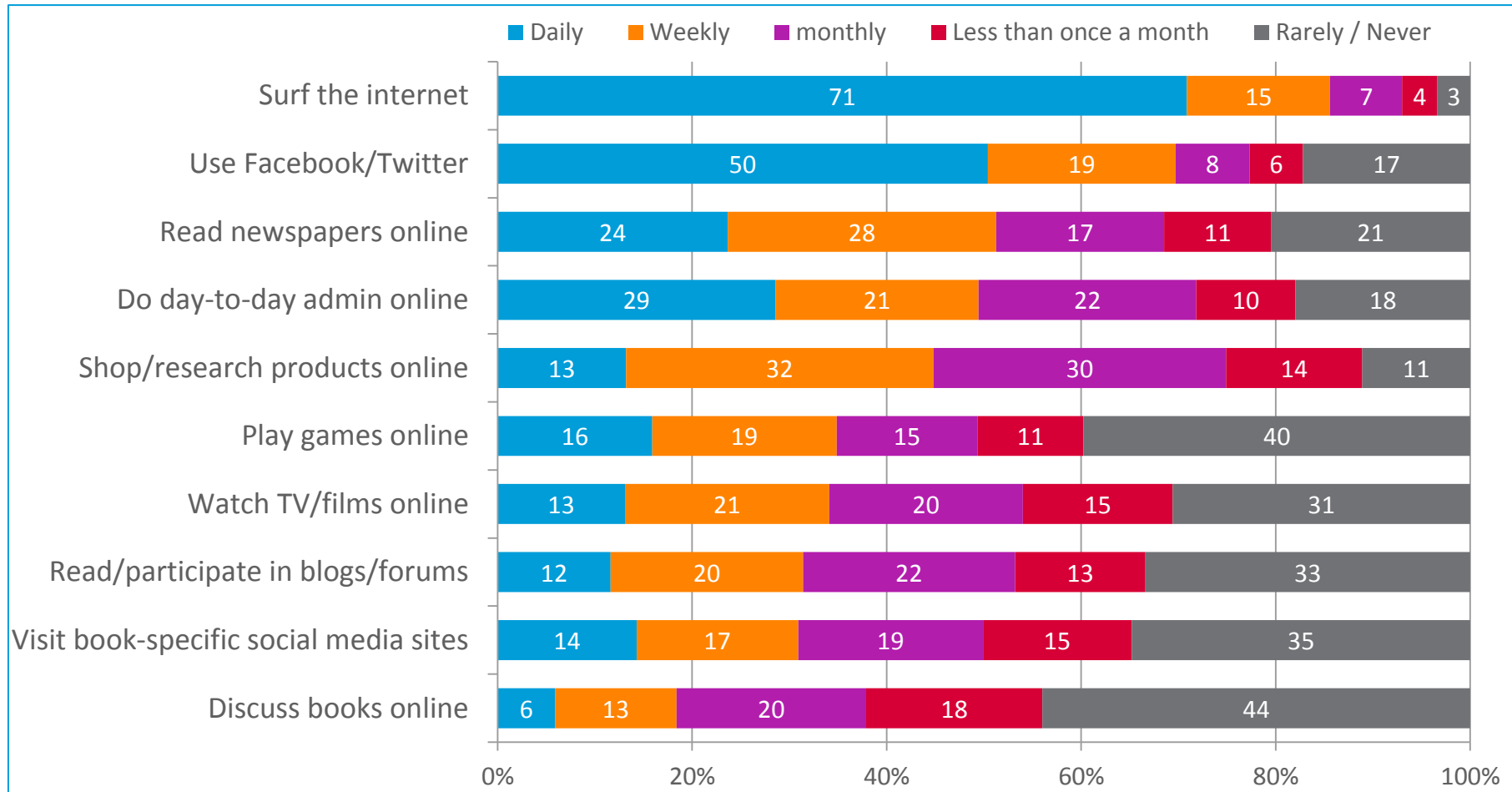
Source: Italian Book Buyer Survey 2014 © Nielsen 2015



## 14. ONLINE HABITS

Seven out of ten Italians aged 18-64 surf the internet every day, and most do this at least sometimes. Two thirds use Facebook or Twitter every week, while half are weekly readers of newspapers online and shop/research for products online. A third are weekly users of online games, online TV/films and book-specific social media sites

### Frequency of online activities

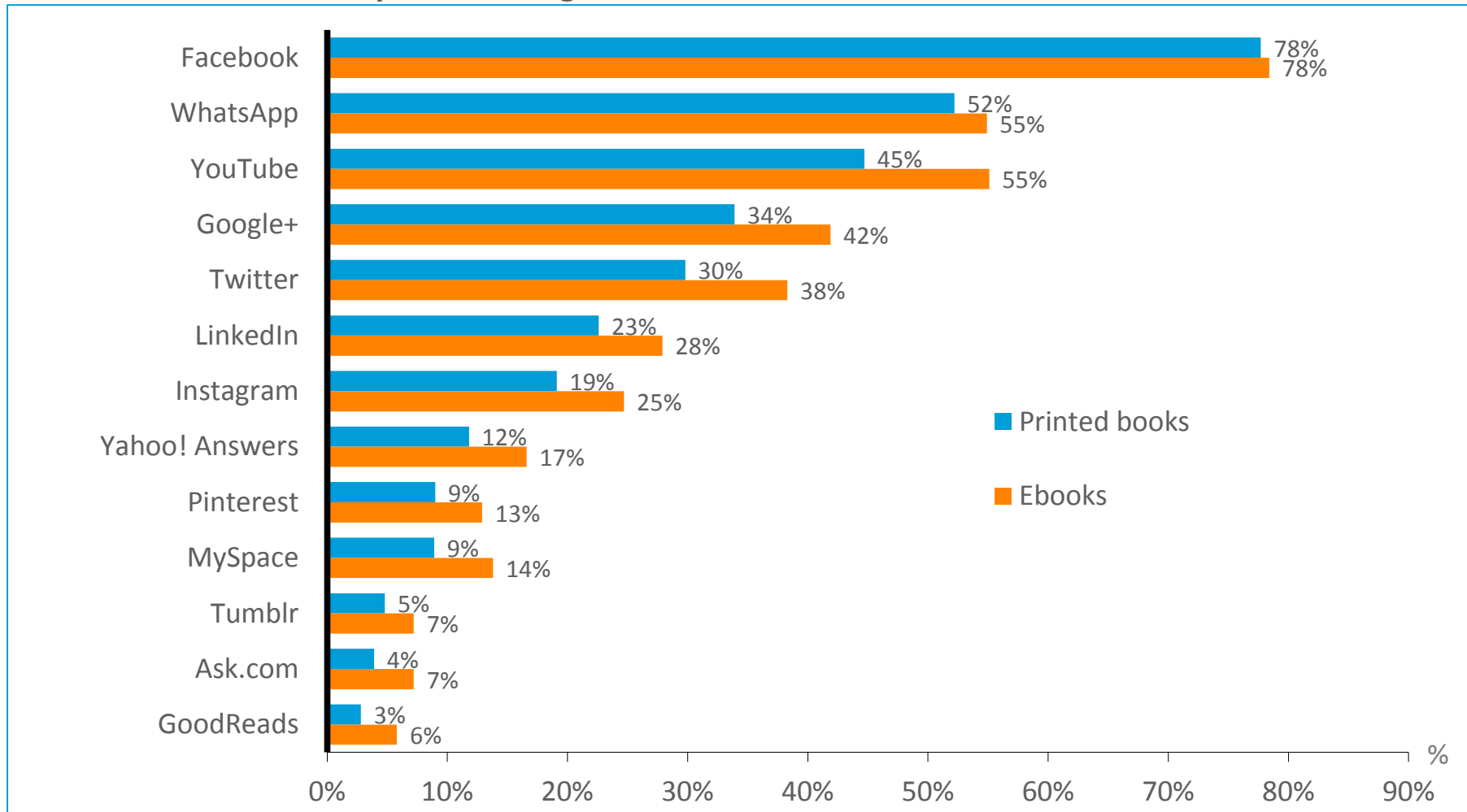


Base: Online Italian consumers aged 18-64

Source: Italian Book Buyer Survey 2014 © Nielsen 2015

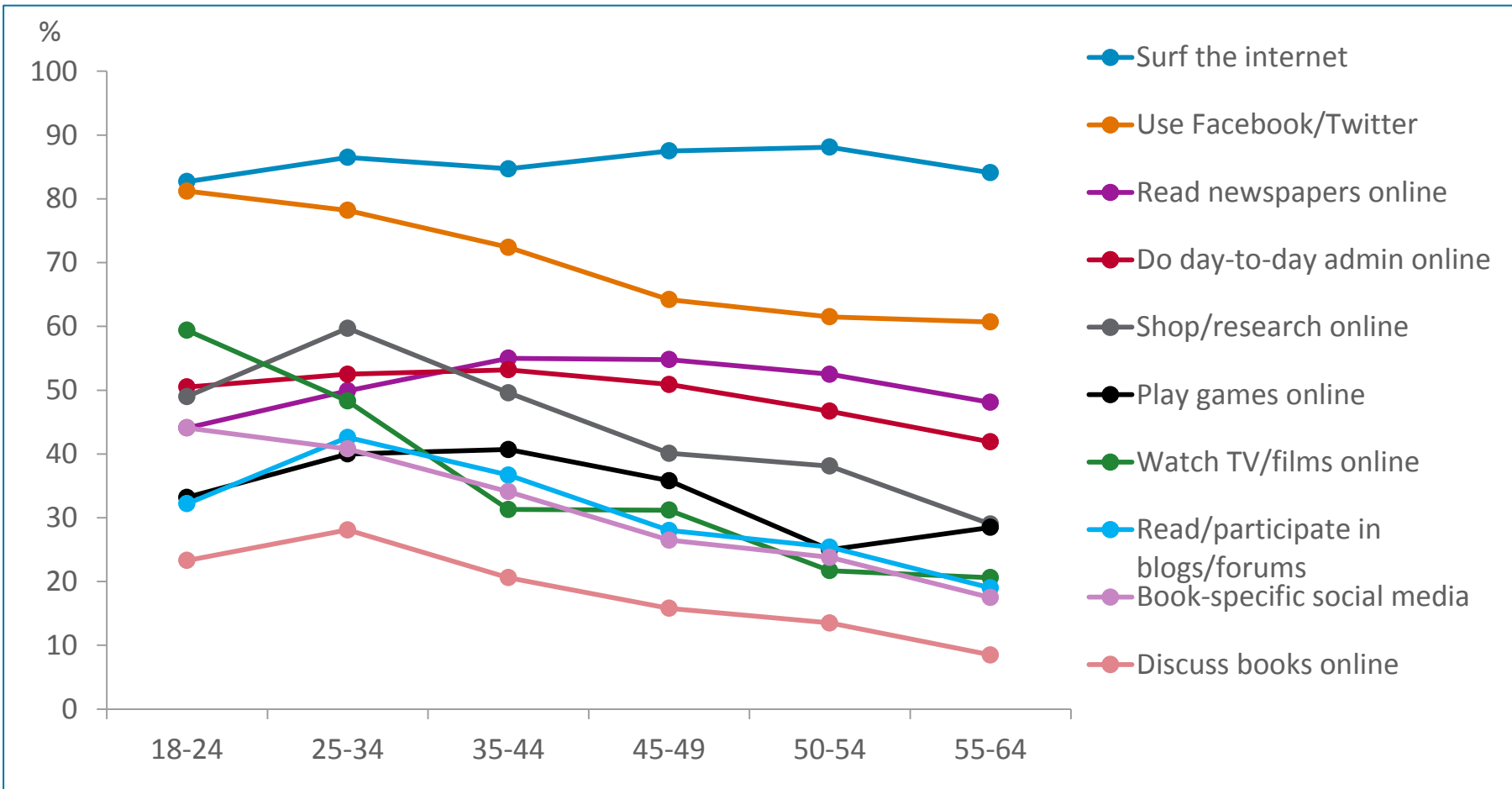
Ebook buyers were more likely to use most social media sites compared to printed book buyers, with the gap widest for YouTube, Google+ and Twitter, and narrowest for Facebook and WhatsApp

### Social networks used: by format bought



Weekly engagement in most online activities decreases with age, and particularly so for using social media, and watching TV/films. In contrast, surfing the internet and reading newspapers/magazines online rise slightly with age

### Weekly online activities: by age



Base: Online Italian consumers aged 18-64

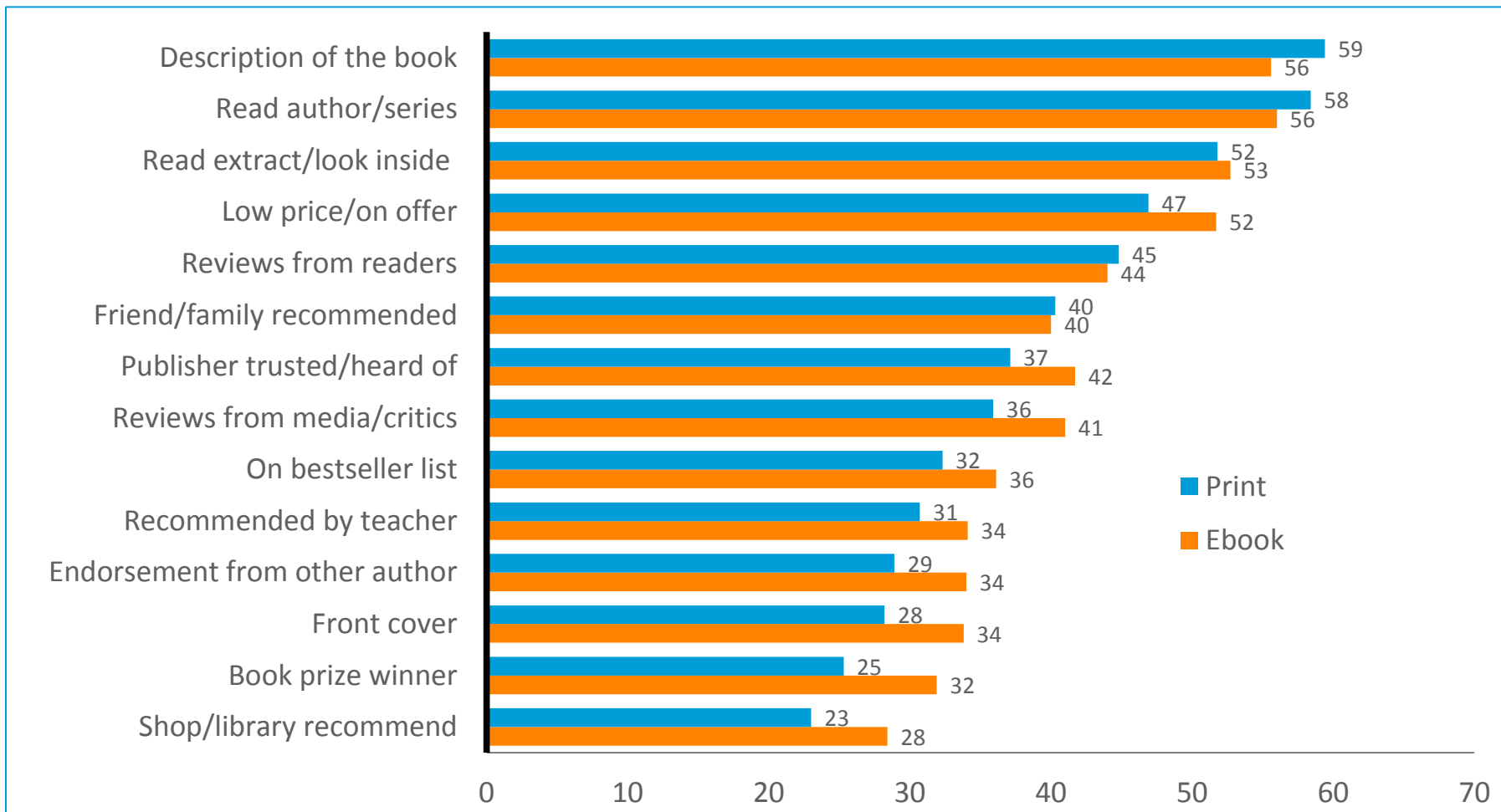
Source: Italian Book Buyer Survey 2014 © Nielsen 2015



## BOOK PURCHASE INFLUENCES

The main influences to purchase were similar for print and ebooks, with blurb, author/series, reading extracts, price and reader reviews the top 5 in each case. Price was a little more important for ebooks, as were a range of other influences (e.g. publisher, media review, book prize, cover) - suggesting that buyers are open to more influences/seek more confirmation when choosing ebooks than print books

### Factors always/often influencing/encouraging purchase of print and ebooks



Base: Online Italian consumers aged 18-64 buying that format

Source: Italian Book Buyer Survey 2014 © Nielsen 2015



# Consumer insight



# BOOK GIFTS FOR SPOUSE/PARTNER: VOLUME, 2014 UK



**When she buys for him**

Xmas

Birthday

Planned

Requested/suitable

Adventure

Humour

For pleasure



**When he buys for her**

Other occasion

No occasion

Impulse

Cover, bestseller

Cookery

Sex

For self improvement

# Thank you

nielsen  
.....

AN UNCOMMON SENSE  
OF THE CONSUMER™

