BNC RESEARCH

The Canadian Book Consumer 2013:

Digital Sales and Trends

January – December, 2013

06.2014

PREPARED BY BOOKNET CANADA STAFF

BOOKNET CANADA

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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.

All respondents were aged eighteen or older and had purchased a minimum of one book, regardless of format, in the prior month. MarketTools ensured that the panel was representative and included men and women and adequate representation from all regions across Canada.

Focus was placed on having a statistically valid panel. The panel was built by monthly recruiting of over 333 book buyers who completed surveys about their book-purchasing behaviour. Monthly data was then rolled into a quarterly panel with a minimum of one thousand respondents. This panel was queried from a period of January to December 2013.

Select representatives from a larger panel qualified 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. To ensure the highest quality sample, MarketTools used its patented TrueSample methodology to determine that the people who responded were who they said they were and that they were completing the survey 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 ±3.1% at a 95% confidence interval. In other words, if the same size sample was surveyed one hundred times, it would produce the same results 95% of the time. For these questions, we received a minimum of 333 responses per month for a total of at least 1,000 responses for the quarter.

INFORMATION COLLECTED

The questions in the survey for *The Canadian Book Consumer 2013* were based on work previously conducted by the BISG Research Committee in the United States, with input from BookNet Canada staff and in consultation with members of the Canadian publishing and retail communities.

The survey was comprised of five parts:

- **Part 1** focused on books that were purchased: how many, titles by ISBN, genre, format, and, if the book was an ebook, the primary device the book would be read on.
- **Part 2** focused on where the purchase was made, value for money, intentionality, and the reason a book was purchased from a particular store.
- **Part 3** was about awareness—how the respondent became aware of the book, the reason for purchase, and whether the book was a gift or purchased for a special occasion.
- **Part 4** looked at activities and how respondents spent their leisure time. The focus was a comparison of reading and other activities, both online and offline.
- Additionally, custom questions focusing on specific topics were asked each quarter. The topics covered include library use, behaviour around ebook reading, and the intent to purchase an e-reading device.

BookNet Canada is releasing a series of reports based on the data collected in 2013. This report focuses on ebook sales trends, e-reading devices, and mobile usage and apps.

Introduction

Ebooks and digital adoption remain a hot topic in the Canadian book industry. From publishers to retailers to libraries—not to mention readers—ebooks represent new challenges and opportunities. While research on ebook adoption in the US and UK is helpful, it's not necessarily directly applicable to the Canadian market. In fact, broader market research suggests that when it comes to e-commerce and digital content, Canadian consumer behaviour does not mirror that of American consumers. Canada's unique demographics necessitate dedicated consumer research on how Canadians are discovering, purchasing, and reading books, in all formats.

To aid the Canadian publishing industry in making accurate forecasts and shrewd business decisions, BookNet Canada took on this market research to provide this up-to-date data to its stakeholders. With a second full year of survey data, we're now able to release a series of reports covering annual trends in book-buying behaviour. For the first time, we are also able to provide a year-over-year analysis of the data collected.

The 2012 reports released from this study gave us insight into the market, and with the release of the 2013 reports, we build on that insight with the availability of annual data. In *Digital Sales and Trends*, we measure fluctuations over the year and detect market patterns and progressions. We use two full years of data to examine how ebook adoption and sales vary throughout the year, including the ever-important holiday season.

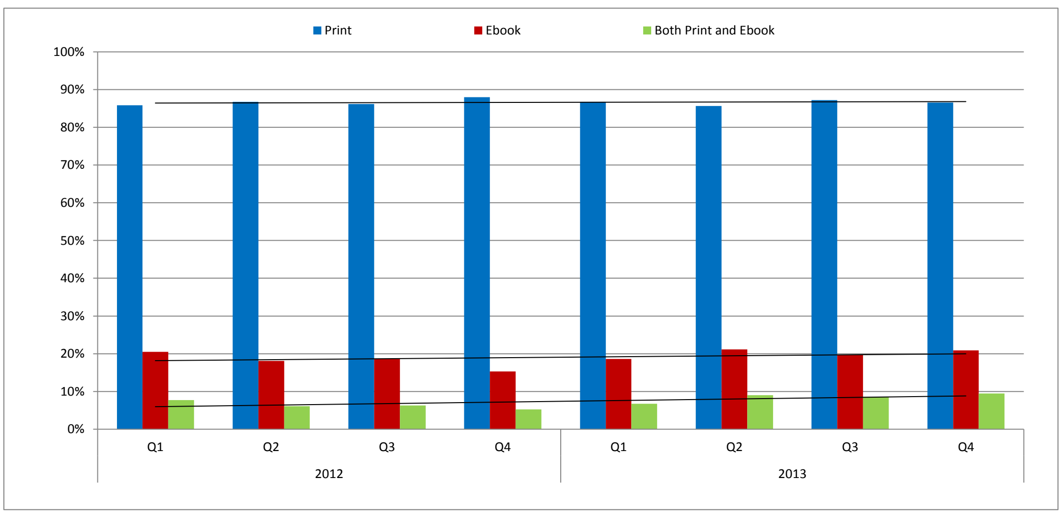
The trends in this report offer a starting point for publishing, marketing, and promoting books (both print and digital) to Canadians. By understanding how Canadians are adopting ebooks, how they choose to use mobile devices and apps, and how their habits are changing, the book industry can take advantage of new opportunities to reach and connect with their readers.

Ebook Sales

Ebook sales remained steady through 2013

In 2012, over the course of the year we saw a steady decline in the number of ebooks purchased. This pattern did not hold throughout the four quarters of 2013. The table below shows respondents who purchased an ebook, a print book, or both. (Note: this is not a review of the total number of books sold, but rather the percentage of book buyers who purchased in each format during each quarter.) While the rate of ebook purchases was on a small but steady decline in 2012, it seemed to pick up and then remain fairly stable through the course of 2013. A possible explanation for this could be that the economy was stronger in 2013 and therefore consumers felt more comfortable purchasing luxuries like ebooks and e-reading devices. In 2012, 18% of respondents said they were cutting down on book buying due to the state of the economy, but that number dropped to 16% in 2013. It may also be that consumers are willing to pay for hot frontlist titles, now that many publishers are publishing titles in both print and ebook format at the same time.

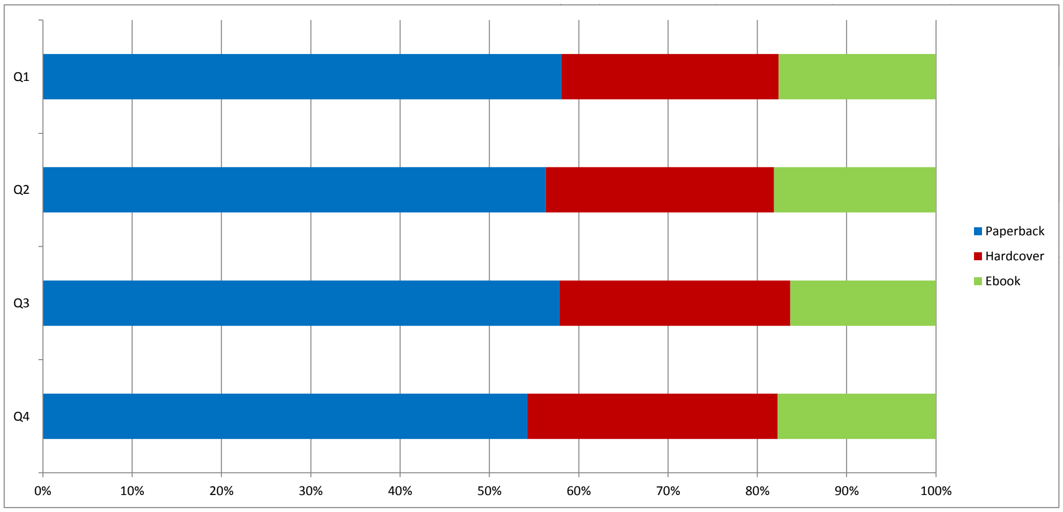
FORMAT PURCHASED BY QUARTER



Question: Please indicate the format of this book. Please select one.
(2012 Q1 N=1,050, Q2 N=1,095, Q3 N=1,005, Q4 N=1,005; 2013 Q1 N=1,050, Q2 N=1,018, Q3 N=1,005, Q4 N=1,005)

The market share of hardcover trade books remained steady throughout the year, hovering at 24–27% with the usual increase in Q4 during the holiday season. The market share of both paperback and ebook sales also remained fairly flat.

MARKET SHARE BY FORMAT



Question: Please indicate the format of this book. Please select one.
(Q1 N=2,938, Q2 N=3,041, Q3 N=3,034, Q4 N=2,970)

In looking at buying preferences, we find that 37% of respondents who had purchased an ebook exclusively purchased ebooks, which is down from the 44% that we saw in 2012. 59% purchased both ebooks and print books in 2013, which is an 8% increase over the 2012 figure. The remaining 4% had purchased an ebook but did not plan to do so in the future, which is down slightly from 5.5% in 2012.

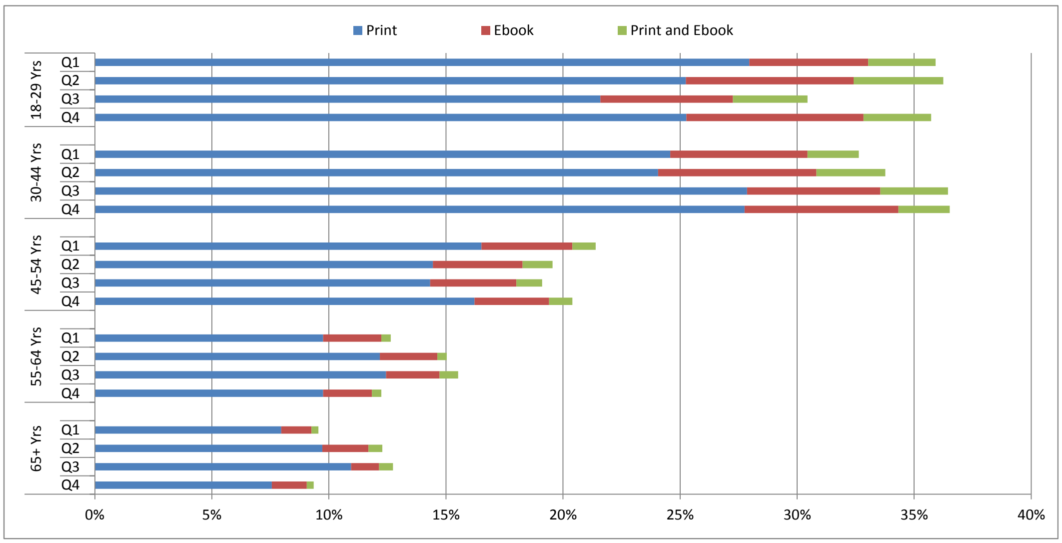
BOOK PURCHASING PATTERNS

	Q4 2012	Q4 2013
I exclusively or mostly purchase ebooks	43.6%	36.5%
I purchase ebooks interchangeably, or I prefer some genres in ebook form and others in print	50.9%	59.4%
I no longer buy ebooks, only print books	5.5%	4.1%

Question: Since you first began acquiring ebooks, which of the following is most true about your book purchasing patterns for personal use? Please select one.
(2012 N=163, 2013 N=197)

In the graph below, we examine print and ebook buyers by age. This doesn't indicate the actual number of books purchased, but rather how many survey respondents purchased print books, ebooks, or both—what format people are buying. While most respondents are predominantly buying print books, we see that respondents between the ages of 18 and 44 are purchasing the largest percentage of both print and ebooks. We found that in 2013, the purchasing by format done by the respondents between the ages of 18 to 29 was much closer to that of the 30–44-year-old respondents than it was in 2012. After the 30–44-year-old age bracket, the percentage of digital purchases decline by age.

FORMAT OF PURCHASES BY AGE

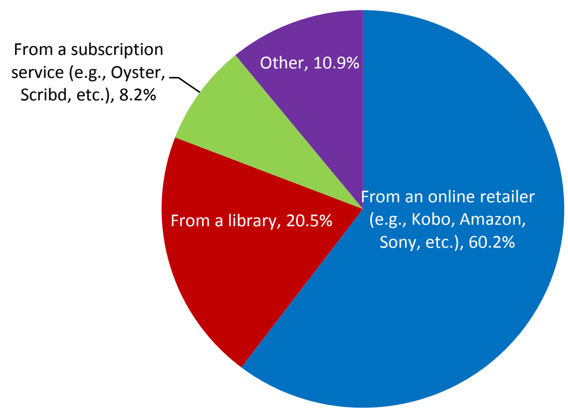


Question: Please indicate the format of this book. Please select one.
Crosstab question: Please indicate your age.
(Q1 N=1,127, Q2 N=1,179, Q3 N=1,160, Q4 N=1,175)

Acquiring Ebooks

The Omnibus survey is performed annually in Q1 and is designed to assess how Canadians spent their leisure time in the previous year. Respondents are asked to measure how much time they spend on a list of activities, including reading books and magazines in different formats. Unlike the consumer survey, respondents are not necessarily book buyers. However, in 2013, with the increase in outlets that offer ebooks, we also inquired about how consumers are acquiring their ebooks.

EBOOK ACQUISITION



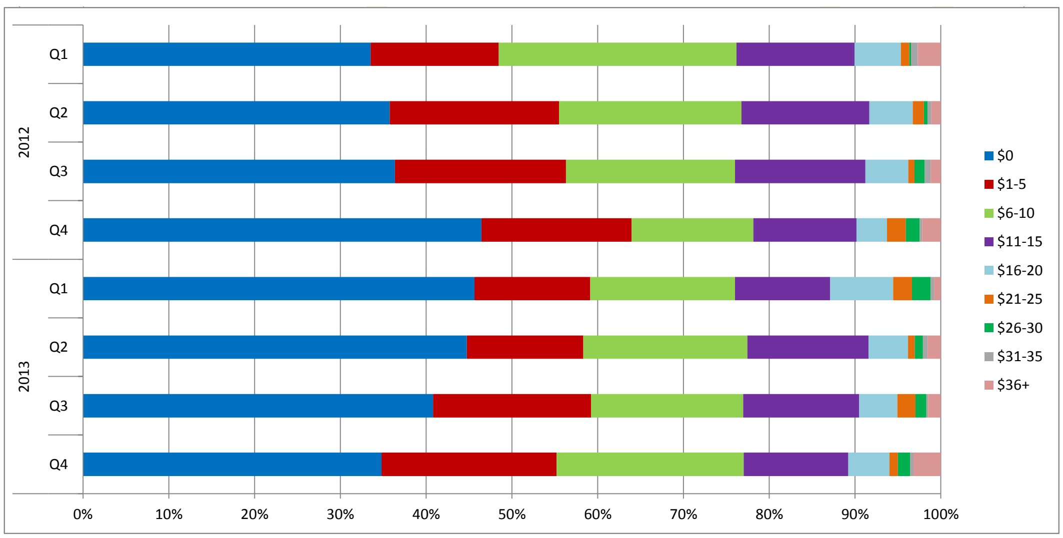
Question: How do you acquire most of your ebooks?
(N=73)

Ebook Pricing

In the fourth quarter of 2012 we saw a notable jump in the number of ebooks obtained for $0, which we thought might have been due to post-holiday downloads. Respondents did not specify whether these were legal downloads. The first half of the 2012 showed a large percentage of ebooks acquired for $0, and there was an increase of just over 10% in free downloads between Q3 and Q4.

In 2013 we saw the opposite trend, with a steady decline of 11% from Q1 to Q4. Perhaps many consumers have already exhausted the supply of free public domain ebooks and are now ready to start paying for them. They also paid the highest prices in the final quarter of 2013, which includes the holiday season—perhaps because people purchasing ebooks as gifts are less concerned about price point.

EBOOK PURCHASE PRICE DISTRIBUTION



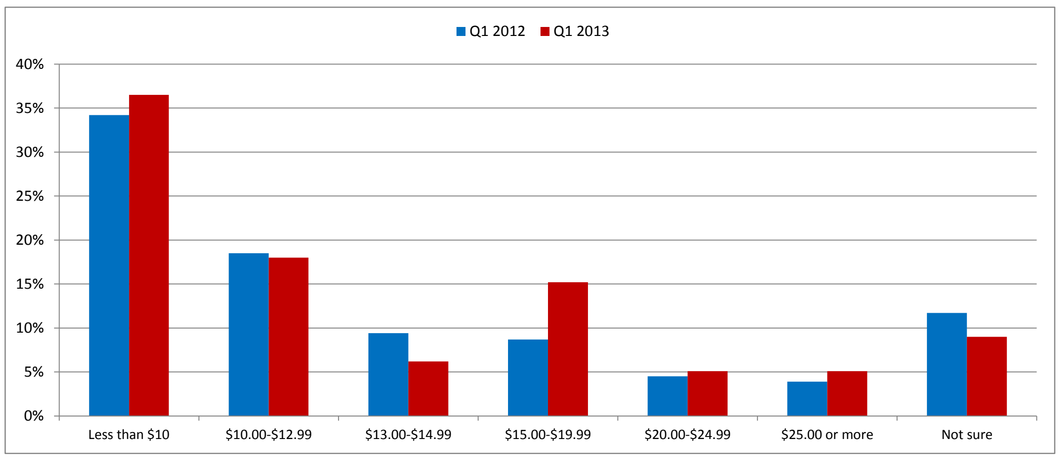
Question: Please indicate the format of this book. Please select one.
Crosstab question: How much did you pay for this book, excluding tax? Please enter the amount in dollars and cents.
(Q1 N=504, Q2 N=524, Q3 N=473, Q4 N=500)

When we asked respondents to comment on the price of ebooks in 2013, 59% said that they found them to be about the same as they were in 2012. 27% believed ebooks were more expensive and 14% thought they were less expensive compared to 2012 prices. According to Digital Book World figures, ebook prices in the US experienced a downward trend in 2013[1].

1 Jeremy Greenfield, “Tracking the Downward Trend on Ebook Prices,” Digital Book World, November 21, 2013, http://www.digitalbookworld.com/2013/tracking-the-downward-trend-on-ebook-prices/.

Whether the price of ebooks was perceived to increase, decrease, or remain the same, it seems that consumers are willing to spend more on them. We did see a slight increase in the number of respondents reporting that they were only willing to spend less than $10 on their ebooks. However, we saw an even greater jump in the number of respondents who would pay $15.00 to $19.99 (over a 6% increase from 2012 to 2013). This increase could have to do with the new trend of ebooks being released simultaneously with print. Ebook prices for brand new titles tend to be above average, yet they are often still less expensive than their print counterparts.

EBOOK PRICE TOLERANCE



Question: What is the maximum price you are willing to pay for ebooks? Please select one.
(2012 N=596, 2013 N=178)

Unfortunately for publishers and retailers, there is no set formula for success when it comes to navigating the world of ebook pricing and ebook price tolerance. To help gain a better understanding of how people shop for ebooks, we surveyed respondents on their shopping behaviour, asking whether they compare prices between formats and between stores. The table below is drawn from questions asked only of respondents who had purchased an ebook in the month prior to taking the survey.

Fewer respondents said they compared print and ebook prices for the same title in 2013 than in 2012. 60% of respondents said that they “often” or “sometimes” compare prices between ebooks and print books, while 40% of participants said that they “rarely” or “never” compare book formats, up from 36% in 2012.

PRICE COMPARISON BY FORMAT

	Q4 2012	Q4 2013
I often compare prices between ebooks and print books	36.4%	27.6%
I sometimes compare prices between ebooks and print books	27.3%	32.7%
I rarely compare prices between ebooks and print books	23.8%	26.3%
I never compare prices between ebooks and print books	12.6%	13.5%

Question: Do you compare prices between print books and ebooks before making a purchase? Please select one.
(2012 N=143, 2013 N=156)

51%
of digital buyers compare prices between e-retailers

It seems likely that a reader's choice of ebook store is influenced by the device or e-reading app they use. If a consumer is partial to a specific app or dedicated e-reading device, the convenience of using their preferred app or the device-specific store may outweigh pricing considerations. We do see an upward trend in readers comparing prices between e-retailers, with 51% "often" or "sometimes" doing so in 2013, up from 45% the year before.

PRICE COMPARISON BY STORE

	Q4 2012	Q4 2013
I often compare ebook prices between stores	18.4%	19.8%
I sometimes compare ebook prices between stores	27.0%	31.5%
I rarely compare ebook prices between stores	24.5%	24.4%
I never compare ebook prices between stores	30.1%	24.4%

Question: Do you compare ebook prices between stores (e-retailers)? Please select one.
(2012 N=163, 2013 N=197)

E-reading Devices

The market share of ebooks in Canada has remained relatively flat throughout 2012 and 2013. There has been widespread media speculation, both in Canada and in other markets, about possible causes for this flattening. Some of the theories centre around devices: if more people are using tablets and phones for reading, are they also more likely to be distracted from reading, since these devices also provide access to games, social media, email, and the Internet?

In 2012 and 2013, we asked respondents which device they would primarily use to read the ebook they had purchased. Reading on Kobo and Kindle devices remained fairly constant throughout 2013, but reading on iPads experienced a decline.

PREFERRED EBOOK READING DEVICE

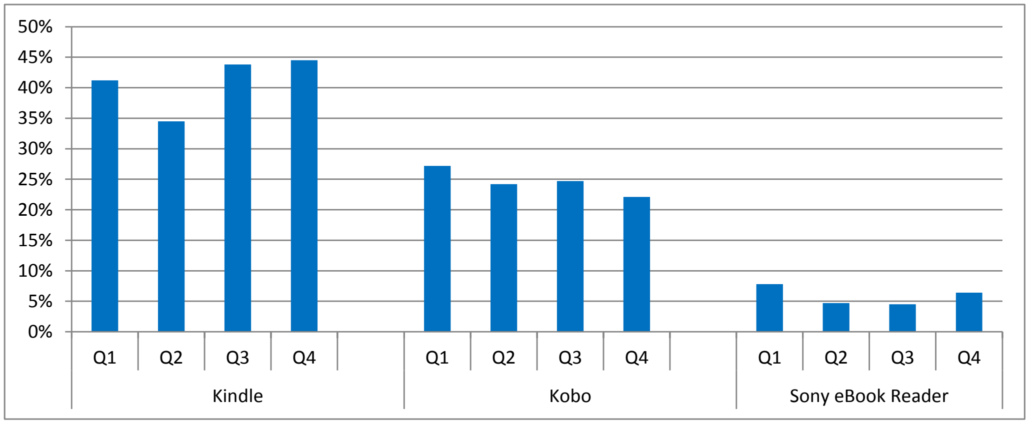
Device	Q1	Q2	Q3	Q4
Kindle	23.4%	27.8%	22.2%	27.1%
Kobo	22.9%	26.6%	33.1%	20.0%
iPad	17.6%	12.3%	9.7%	9.4%
Desktop/laptop computer only (including printing a paper copy)	13.8%	5.9%	8.3%	13.9%
Samsung Galaxy Tab	4.3%	1.0%	2.5%	1.8%
Android Tablet	3.6%	7.1%	4.1%	3.4%
Sony eBook Reader	2.3%	6.2%	2.9%	0.9%
iPhone	1.7%	3.3%	1.4%	4.6%
iPod or other mp3 device (including iPod Touch)	1.3%	0.7%	0.6%	0.5%
Nook	1.1%	0.5%	2.1%	0.5%
Other	4.7%	3.3%	4.4%	11.1%

Question: What one device(s) do you or will you primarily use to read this ebook? Please select one.

(Q1 N=529, Q2 N=579, Q3 N=517, Q4 N=561)

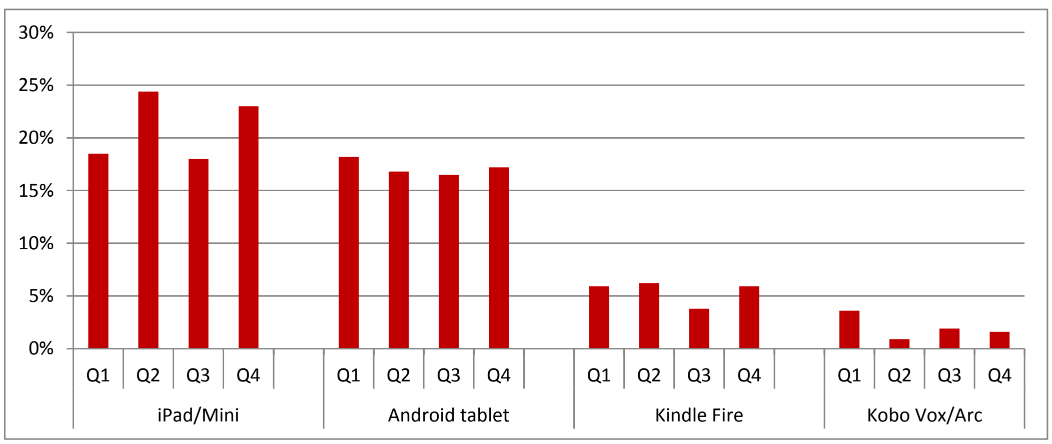
This decline in reading on iPads is not new: the number of readers who preferred an iPad as an e-reading device declined steadily over the course of 2012. Respondents who intended to purchase an iPad or Android tablet, however, showed a significant increase over the same time period. In 2013, the number of iPad readers continued to decline, while the intent to purchase a tablet remained stable. It is interesting to note that, in 2013, an average of 41% of respondents planning to purchase a tablet said that tablet would be a Kindle, while only 21% said their upcoming tablet purchase would be an iPad.

PLANNED PURCHASES OF E-READERS 2013



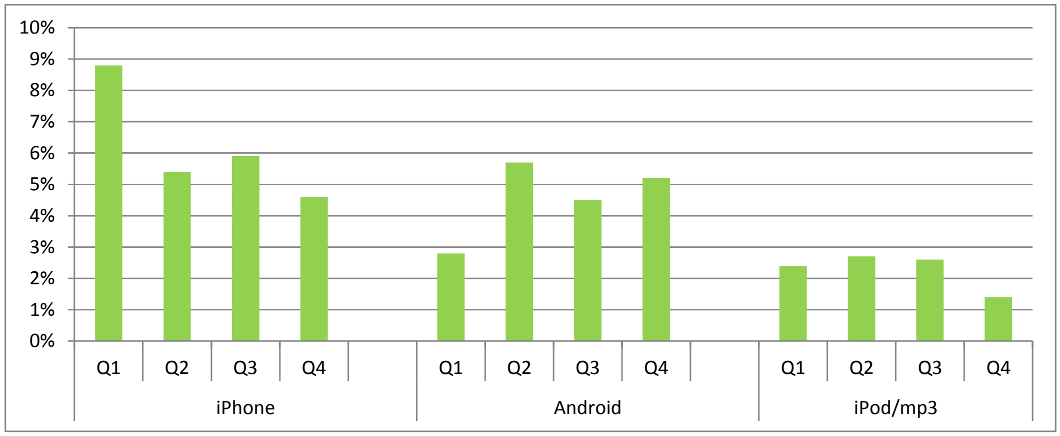
Question: Which of the following ebook readers are you most likely to buy in the next month? Select all that apply.
(Q1 N=422, Q2 N=405, Q3 N=422, Q4 N=439)

PLANNED PURCHASES OF TABLETS 2013



Question: Which of the following ebook readers are you most likely to buy in the next month? Select all that apply.
(Q1 N=422, Q2 N=405, Q3 N=422, Q4 N=439)

PLANNED PURCHASES OF MOBILE DEVICES 2013

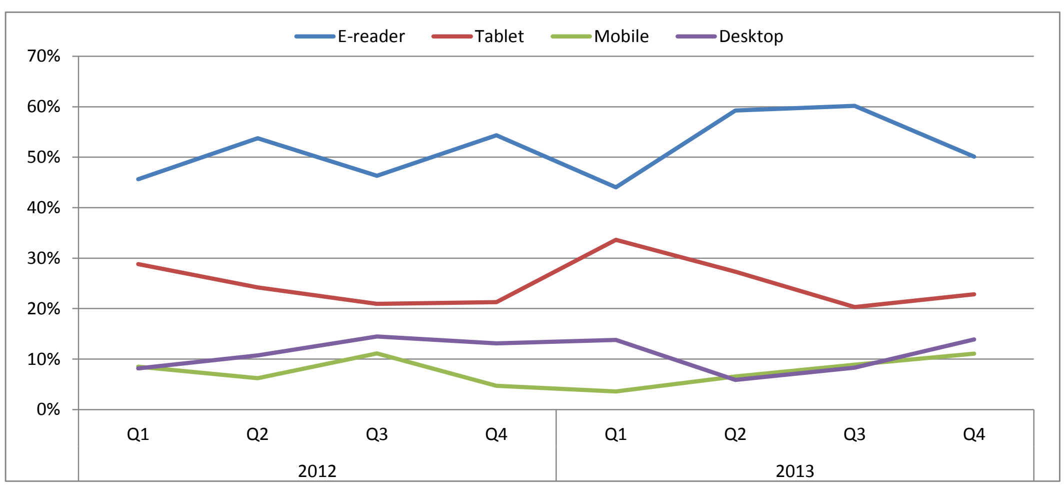


Question: Which of the following ebook readers are you most likely to buy in the next month? Select all that apply.
(Q1 N=422, Q2 N=405, Q3 N=422, Q4 N=439)

Dedicated ebook readers remain the preferred device to read on

When we categorize the results by device type, we find that dedicated ebook readers, as in 2012, remain the preferred device to read on. Tablet use saw a decrease from 34% in Q1 to 23% in Q4, explored later in this report. Mobile use increased steadily through 2013 to end at 11% in Q4. Although mobile devices still rank in last place out of the four types of e-reading devices surveyed, this steady growth over 2013 marks a significant increase.

PRIMARY DEVICE USED FOR READING EBOOKS

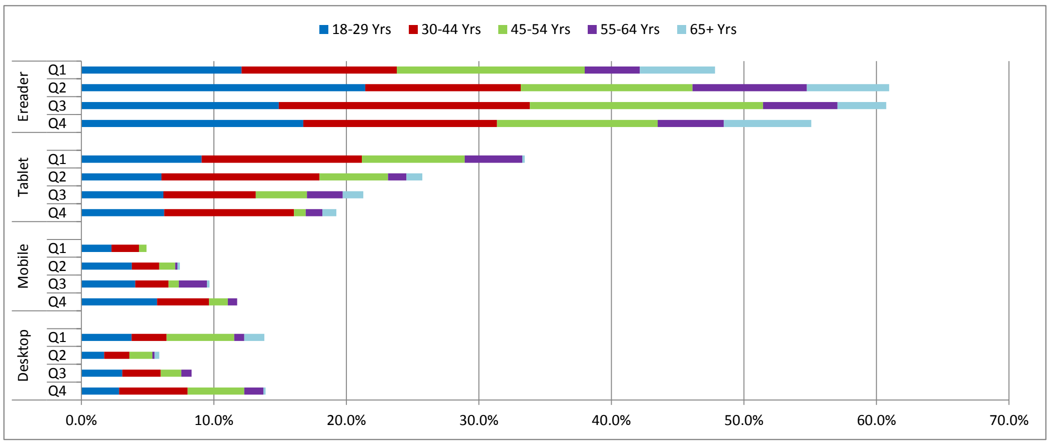


Question: What one device(s) do you or will you primarily use to read this ebook? Please select one.
(2012 Q1 N=541, Q2 N=467, Q3 N=449, Q4 N=381; 2013 Q1 N=529, Q2 N=579, Q3 N=517, Q4 N=561)

Adoption of mobile reading is increasing for most age brackets

In 2012, we found that the steadiest increase in mobile reading happened among respondents aged 30–44, and we found the same to be true in 2013. At the beginning of the year we see that respondents who report reading on their mobile phone are predominantly from the youngest demographic (18–29), but by the end of the year, there is a more even distribution among age groups. While all demographics show an increase over 2013, the mobile adoption of the 30–44 demographic approaches that of the 18–29 group.

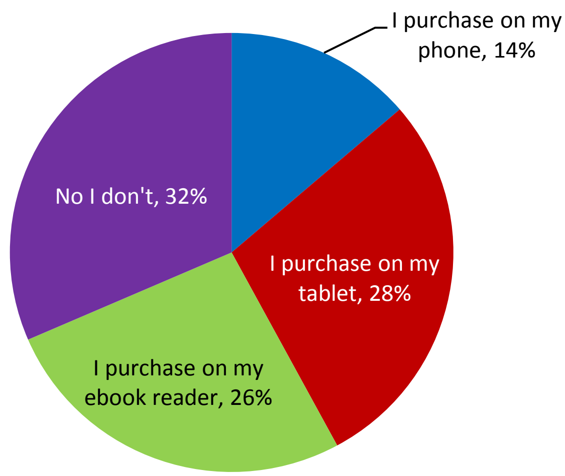
PRIMARY DEVICE USED FOR READING EBOOKS BY AGE BRACKET



Question: What one device(s) do you or will you primarily use to read this ebook? Please select one.
Crosstab question: Please enter your age.
(Q1 N=529, Q2 N=579, Q3 N=517, Q4 N=561)

In Q4 of 2013, we asked consumers a series of questions focused on ebook purchasing habits, including what device they use to buy ebooks. The majority purchase ebooks directly on the device that they will read them on. Presumably, this is largely due to the fact that users can connect wirelessly to the Internet from almost any device, and as we know, convenience is a huge factor in consumer buying habits.

DEVICE USED FOR PURCHASING EBOOKS

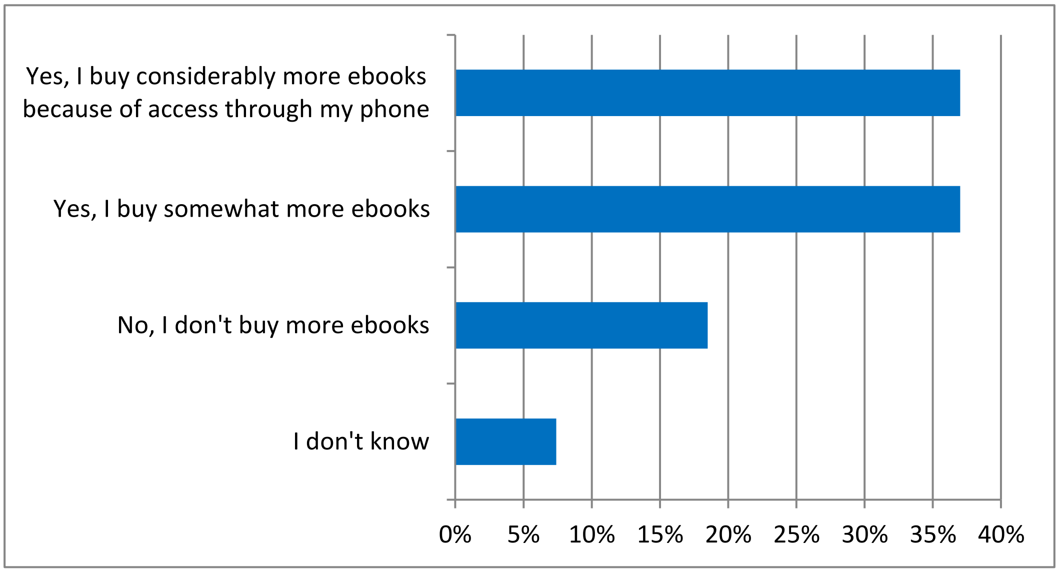


Question: Do you purchase ebooks on your device? Please select one.
(N=197)

74%
of readers who purchase ebooks on their phones believe that mobile purchasing increases the number of ebooks they buy

We have seen that consumers choose print book retailers based on price and convenience—the likelihood that the titles they are interested in will be in stock, or the fact that they can take care of other shopping at the same time. Convenience is also a big factor for e-retailers. We asked respondents in Q4 if they bought books more frequently when purchasing on their phone, and though the number of respondents was low, 74% of readers who purchase ebooks on their phones believed that mobile purchasing increased the number of ebooks they bought.

PURCHASING BOOKS ON A MOBILE PHONE



Question: As somebody who purchases ebooks on your phone do you feel that being able to buy at any time through your phone (always being connected) results in you buying more frequently? Please select one.
(Q4 N=27)

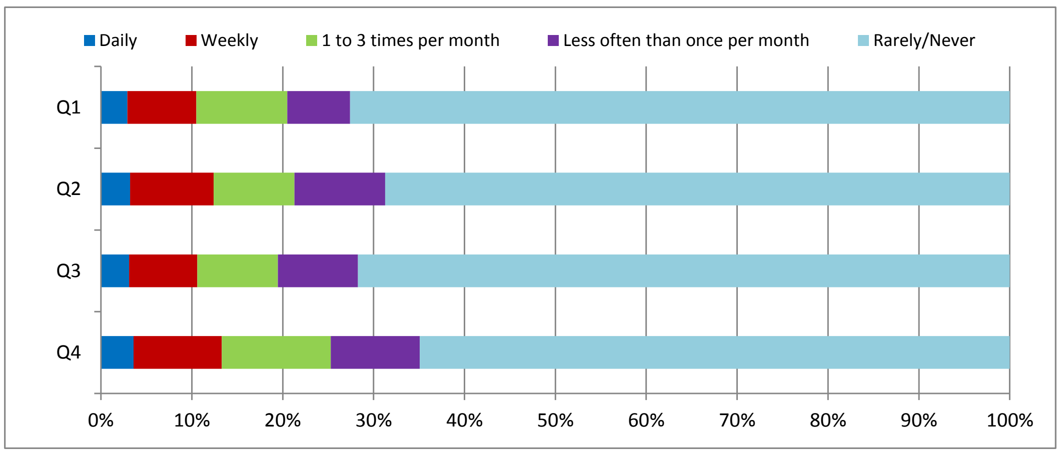
Mobile Usage

An average of
8%
of respondents report that they read their purchased book on a mobile phone

As the number of readers using mobile devices increases, one of the trends we are following with interest is whether the convenience and accessibility of these devices will lead to an increased amount of time spent reading per day among mobile readers.

In both 2012 and 2013, an average of 8% of respondents reported that they read their purchased book on a mobile phone. We asked respondents how often they read on their mobile phones, if at all.

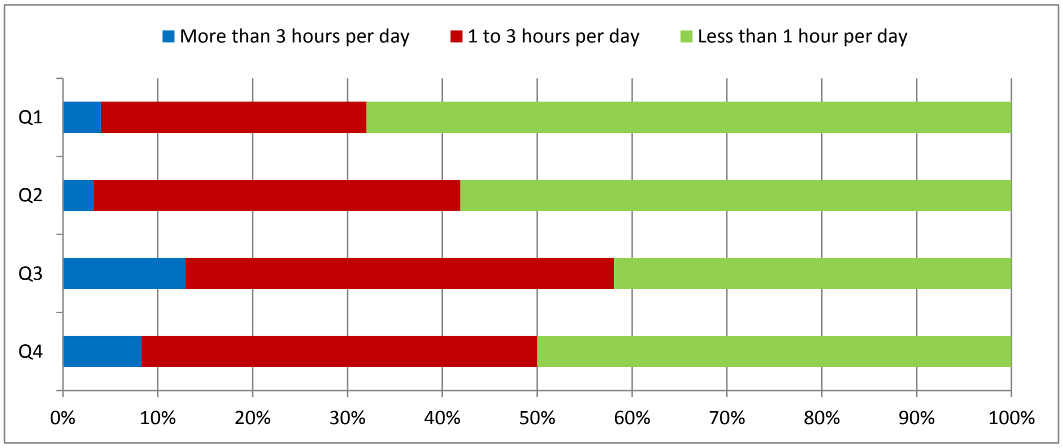
TIME SPENT READING ON A MOBILE PHONE



Question: How often do you engage in the following activities? Please select an answer for each activity. (Read a book on my mobile phone/PDA/smartphone)
(Q1 N=868, Q2 N=981, Q3 N=1,005, Q4 N=1,005)

Participants who reported that they read daily in any format were asked how many hours per day they spent reading specifically on their phones. Although this group represented a small number of respondents, the graph below compares how dedicated daily reading time has changed for these respondents.

TIME SPENT DAILY READING ON A MOBILE PHONE



Question: Approximately how many hours per day do you engage in the following activities?
(Q1 N=25, Q2 N=31, Q3 N=31, Q4 N=36)

While this is a small group, the change in their usage rates year over year is worth noting. In 2012, no participants reported reading on their phones for more than three hours per day, but in 2013, an average of 7% did. While people using their smartphone to read are still a small segment of the overall market, once they start reading on their mobile phones, their daily usage rates increase.

Conclusion

After experiencing a steady decline over 2012, ebook sales picked back up in 2013 and remained fairly flat over the course of the year. Interestingly, the number of respondents who purchase both print and ebooks has increased. This suggests that ebooks and print books may be able to live harmoniously, without one hindering the other. Also, while price is a highly motivating factor in choosing to make any purchase, it seems that consumers are willing to pay for the convenience that buying ebooks offers.

In terms of pricing, 77% of ebooks are purchased for less than $10 (89% under $15). This includes a significant amount of ebooks being acquired at $0. This content could be public domain content, self-published material, or ebooks acquired through other means. However, we are seeing a slight decline in $0 ebooks in 2013 and a slight increase in ebook sales with a price point between $1 and $10. Perhaps consumers are seeing the value in paying for ebook content rather than downloading it for free. Cost-conscious shopping is not unique to digital books, but perhaps we are coming closer to finding the sweet spot for ebook pricing.

The market for smartphones and tablets is getting increasingly competitive, which may be fragmenting the market and creating hesitation in consumers. Many e-reading platforms are beginning to allow the transferring of personal digital libraries to other platforms, but the jury is still out on which devices and platforms will provide the best reading experience. However, it seems like even with the mass adoption of new technology, there will always be a place for paper in certain situations.

But regardless of format, we're seeing a clear trend towards convenience. Whether they choose to visit an independent bookstore because of the titles they stock, or purchase books in digital format to get them immediately, consumers are looking to save not only money but time as well. It will be interesting to watch how the need for convenience will impact the means of discovery over time.

APPENDIX A – ANNUAL MARKET SNAPSHOT

In 2013, the Canadian trade market for print books experienced a rise and plateau. This is not unexpected, as ebooks continue to gain popularity among readers. According to BookNet Canada's market research, approximately 17% of books purchased in 2013 were ebooks.

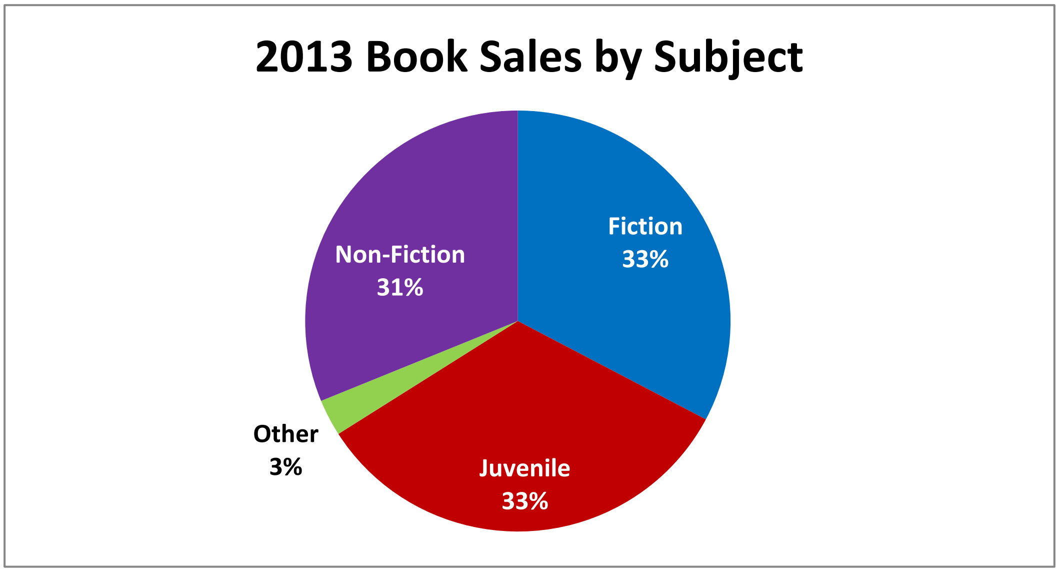
Below is the size of the Canadian book market in 2013, according to the tracking of print books done by BNC SalesData.

Volume (Units Sold)	Value (C$)
52,793,959	$950,452,722.03

According to our analysis of the control group of retail panelists, the trade print market saw similar dips in volume and value.

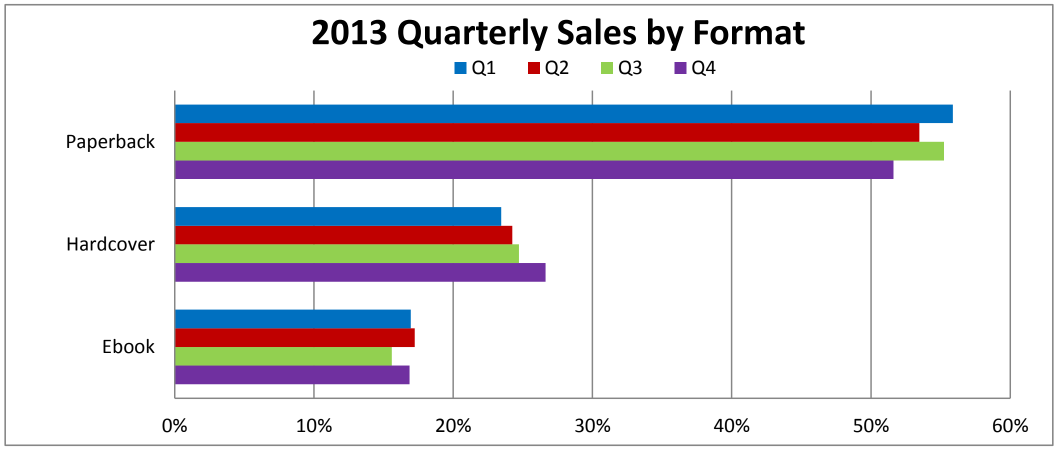
Volume	Value
39,439,606	$711,239,160.91

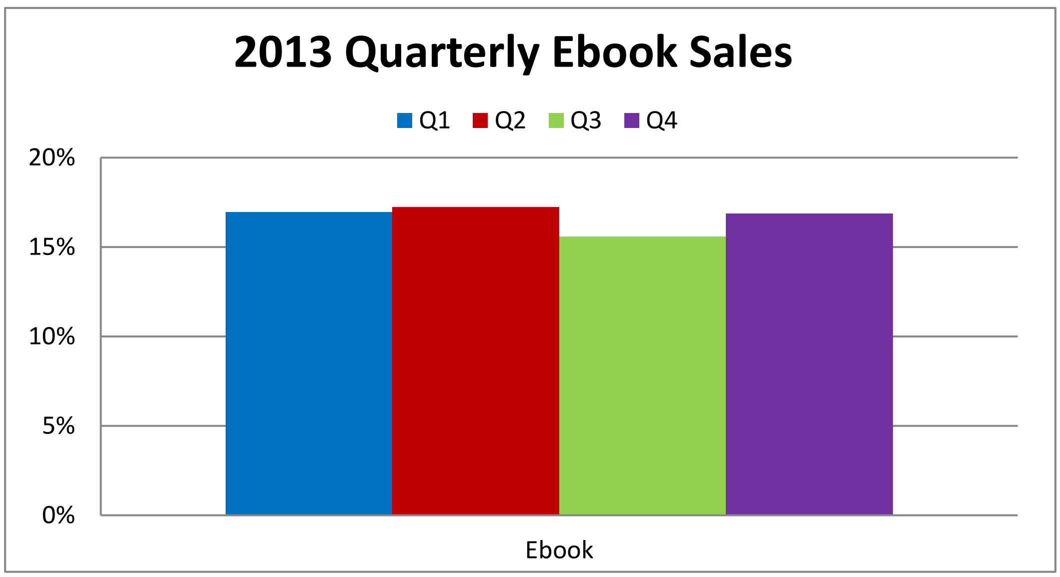
Here is how the Canadian market breaks down across major subject categories:



According to BookNet Canada's consumer research, ebook sales in 2013 were highest in Q2, but remained fairly flat over the course of the year.

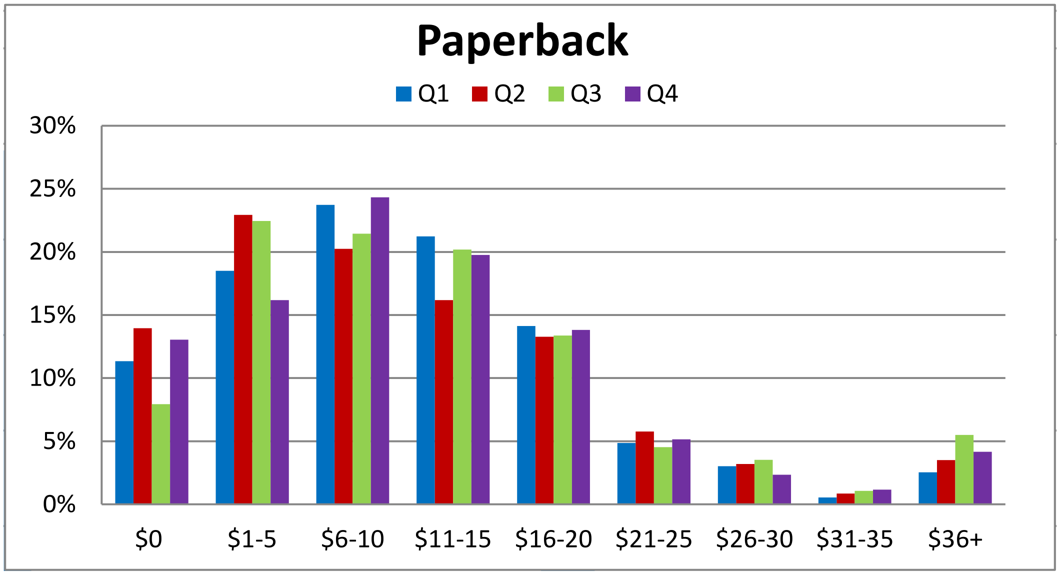
APPENDIX A – ANNUAL MARKET SNAPSHOT (CONTINUED)

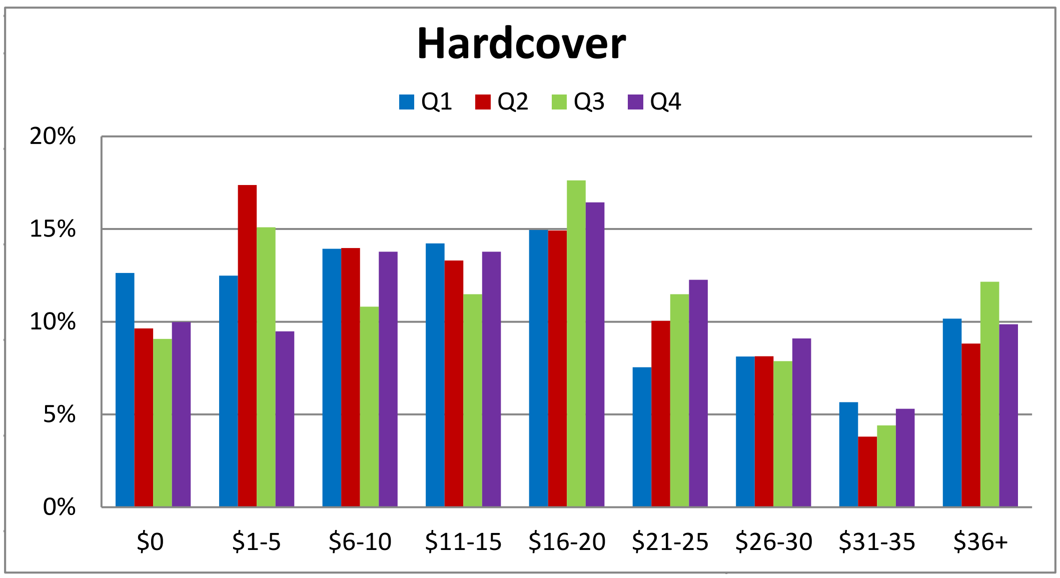




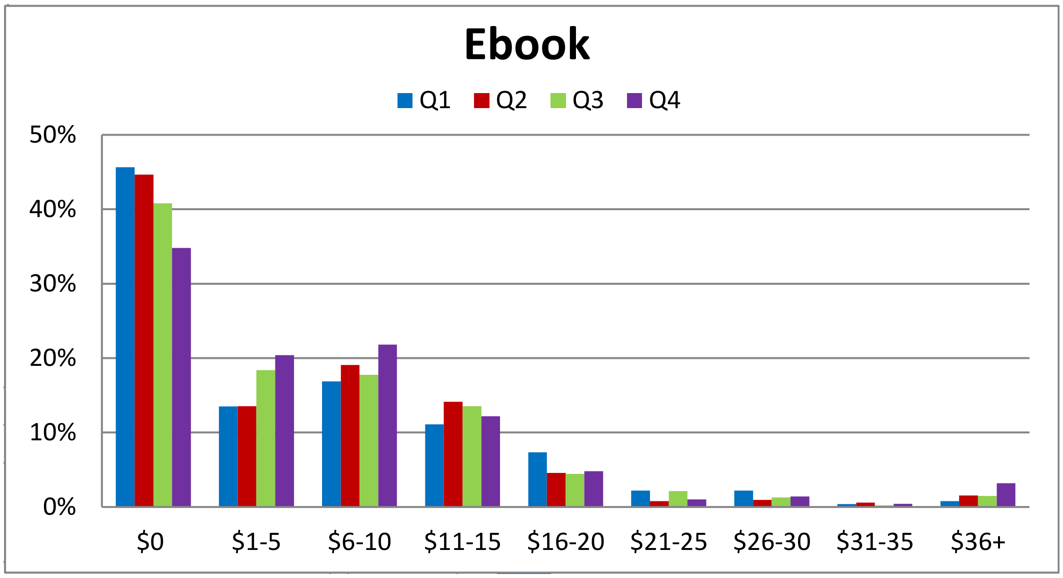
For more information on print market size and trends, purchase the most recent edition of *The Canadian Book Market*, a comprehensive guide to the Canadian print market. BookNet Canada produces this annual report as part of our commitment to informing and empowering members of the Canadian book industry supply chain to thrive, innovate, and compete. The report is compiled using data from BNC SalesData, BookNet's national sales tracking service that collects POS data from over 2,000 retail outlets across the country—an estimated print market coverage of 85%.

APPENDIX B – AVERAGE PRICE PAID BY FORMAT





APPENDIX B – AVERAGE PRICE PAID BY FORMAT (CONTINUED)



APPENDIX C – DEMOGRAPHICS

	Q1			Q2			Q3			Q4		
	Total	Print	Ebook	Total	Print	Ebook	Total	Print	Ebook	Total	Print	Ebook
Gender												
Male	36.8%	37.6%	32.6%	38.5%	38.7%	36.7%	46.0%	46.6%	45.0%	49.2%	48.2%	51.7%
Female	63.2%	62.4%	67.4%	61.5%	61.3%	63.3%	54.0%	53.4%	55.0%	50.8%	51.8%	48.3%
Age												
18-29 Yrs	30.5%	32.2%	27.3%	29.6%	28.3%	31.0%	25.0%	24.3%	25.7%	29.5%	28.5%	30.9%
30-44 Yrs	28.8%	28.3%	31.6%	27.2%	22.5%	26.6%	32.4%	26.4%	35.0%	31.6%	25.9%	31.5%
45-54 Yrs	19.6%	19.0%	20.9%	17.4%	14.2%	17.7%	17.0%	13.5%	22.1%	19.1%	15.7%	18.8%
55-64 Yrs	12.1%	11.2%	13.4%	14.3%	12.0%	13.9%	13.9%	11.9%	11.4%	11.2%	9.5%	10.7%
65+ Yrs	9.0%	9.2%	7.0%	11.5%	9.4%	10.8%	11.6%	10.5%	5.7%	8.6%	7.3%	8.1%
Population Density												
A city or urban area	54.4%	54.7%	55.1%	52.0%	49.5%	62.7%	56.7%	57.4%	55.7%	57.7%	58.2%	55.0%
Suburban area	22.6%	22.8%	22.5%	25.5%	27.0%	20.9%	22.3%	21.4%	25.0%	25.0%	25.5%	22.8%
Small town/rural area	23.0%	22.5%	22.5%	22.5%	23.5%	16.5%	21.0%	21.3%	19.3%	17.3%	16.3%	22.1%
Highest Level of Education Completed												
Less than high school	3.6%	3.9%	1.6%	2.1%	1.8%	2.5%	2.1%	1.8%	1.4%	2.3%	2.2%	2.7%
High school graduate or equivalent	16.3%	16.4%	13.9%	16.8%	17.8%	10.1%	17.5%	18.4%	13.6%	17.4%	17.2%	18.1%
Some college, no degree	18.3%	19.2%	13.4%	15.9%	16.2%	14.6%	17.8%	17.3%	17.1%	16.2%	16.5%	13.4%
College degree	45.6%	44.3%	52.4%	48.5%	47.7%	53.8%	46.5%	46.9%	48.6%	47.7%	47.8%	48.3%
Graduate or professional degree	14.6%	14.6%	17.6%	15.3%	15.0%	18.4%	15.2%	15.5%	15.7%	15.9%	15.9%	16.8%
Prefer not to answer	1.6%	1.7%	1.1%	1.4%	1.5%	0.6%	0.9%	0.2%	3.6%	0.5%	0.5%	0.7%
Employment Status												
Employed full time	41.2%	40.5%	50.3%	40.4%	40.1%	43.7%	41.4%	41.7%	41.4%	44.8%	45.2%	42.3%
Employed part time	10.0%	10.3%	7.5%	11.8%	11.6%	12.0%	10.2%	10.3%	10.0%	11.5%	11.5%	11.4%
Self-employed	6.7%	6.4%	5.3%	6.2%	6.4%	5.7%	8.1%	7.1%	12.9%	7.7%	7.2%	7.4%
Not employed, but looking for work	6.5%	6.7%	4.8%	5.5%	5.3%	6.3%	3.3%	3.3%	3.6%	6.0%	6.1%	5.4%
Not employed and not looking for work	2.6%	2.5%	2.1%	2.5%	2.4%	3.2%	2.2%	2.1%	1.4%	2.6%	2.7%	2.7%
Retired	13.6%	13.3%	15.0%	16.9%	17.3%	15.8%	17.0%	18.2%	12.1%	12.1%	12.3%	12.1%
Student, not employed	4.1%	4.6%	3.2%	3.3%	3.6%	1.9%	3.7%	3.7%	3.6%	3.7%	3.5%	5.4%
Student, employed part time	3.2%	3.3%	1.6%	2.6%	2.4%	2.5%	3.4%	3.4%	2.9%	2.9%	2.9%	2.7%
Student, employed full time	0.4%	0.5%	0.0%	1.0%	1.0%	0.6%	1.0%	0.8%	1.4%	0.7%	0.4%	2.7%
Homemaker	9.6%	9.5%	9.6%	7.9%	7.9%	6.3%	8.2%	8.1%	8.6%	6.8%	7.0%	6.7%
Prefer not to answer	2.3%	2.4%	0.5%	2.1%	1.9%	1.9%	1.6%	1.3%	2.1%	1.3%	1.2%	1.3%

APPENDIX C –DEMOGRAPHICS (CONTINUED)

	Q1			Q2			Q3			Q4		
	Total	Print	Ebook	Total	Print	Ebook	Total	Print	Ebook	Total	Print	Ebook
Primary Occupation												
Professional (doctor, lawyer, teacher, etc.)	18.3%	17.8%	24.0%	18.4%	18.1%	20.3%	17.5%	17.4%	19.0%	15.9%	16.1%	14.3%
Executive / official / company officer / administrator	9.8%	10.1%	9.6%	9.9%	9.4%	14.4%	10.3%	10.7%	8.6%	12.3%	12.7%	10.9%
Sales / Marketing	6.6%	6.7%	5.5%	8.2%	8.1%	10.2%	8.1%	7.7%	8.6%	9.2%	8.7%	12.6%
Secretarial / clerical / office worker	10.4%	10.5%	11.0%	10.6%	10.2%	13.6%	9.5%	9.8%	10.3%	8.2%	8.7%	6.7%
Military (active in any branch; officer or enlisted)	0.4%	0.4%	0.0%	0.1%	0.2%	0.0%	0.9%	0.8%	1.7%	0.4%	0.3%	0.8%
Skilled labor / craftsman / machinist	4.2%	4.1%	4.8%	5.8%	6.1%	3.4%	8.6%	9.2%	6.9%	7.9%	7.0%	9.2%
Unskilled labor	2.8%	2.7%	2.1%	4.1%	4.2%	3.4%	3.3%	2.8%	4.3%	4.9%	4.9%	4.2%
Farmer	1.4%	1.3%	1.4%	0.7%	0.8%	0.0%	0.6%	0.6%	0.9%	0.6%	0.8%	0.0%
Repairman / carpenter / electrician / plumber	0.9%	1.0%	0.7%	0.9%	0.8%	0.8%	0.8%	0.8%	0.9%	0.6%	0.3%	1.7%
Factory worker	0.5%	0.4%	0.7%	1.0%	1.1%	0.8%	1.0%	0.9%	0.9%	1.4%	1.1%	3.4%
Truck driver / delivery / bus driver	0.8%	0.6%	0.0%	1.3%	1.5%	0.8%	1.0%	0.9%	0.9%	1.1%	1.4%	0.0%
Service (police, fireman, waiter, sanitation worker)	3.0%	2.5%	4.8%	3.5%	3.2%	5.9%	1.4%	1.6%	0.0%	2.6%	2.5%	2.5%
Student	5.3%	5.9%	4.1%	4.4%	4.8%	2.5%	4.7%	4.9%	4.3%	4.6%	4.5%	6.7%
Homemaker	12.4%	12.3%	12.3%	10.5%	10.5%	8.5%	10.5%	10.6%	10.3%	8.5%	8.8%	8.4%
Other	18.4%	18.6%	17.1%	15.8%	16.0%	12.7%	17.2%	17.2%	18.1%	16.4%	17.2%	12.6%
Prefer not to answer	4.9%	5.0%	2.1%	4.7%	5.0%	2.5%	4.5%	3.9%	4.3%	5.3%	5.3%	5.9%
Marital Status												
Single, never married	28.8%	29.4%	27.8%	28.7%	27.6%	32.3%	28.0%	29.4%	24.3%	33.1%	32.3%	34.9%
Married	47.6%	46.3%	53.5%	45.7%	45.9%	42.4%	47.5%	46.3%	54.3%	45.1%	46.2%	44.3%
Living with partner	11.6%	12.0%	11.8%	12.9%	13.3%	13.3%	11.8%	12.0%	12.1%	10.7%	10.7%	11.4%
Separated	2.9%	3.0%	2.1%	2.3%	2.1%	3.2%	2.4%	3.0%	1.4%	2.8%	2.3%	2.7%
Divorced	5.2%	5.3%	2.7%	6.3%	6.7%	5.1%	6.8%	5.3%	5.0%	5.2%	5.2%	4.7%
Widowed	2.0%	1.8%	2.1%	2.8%	3.4%	0.6%	2.3%	1.8%	1.4%	1.9%	2.1%	0.7%
Prefer not to answer	2.0%	2.2%	0.0%	1.4%	1.1%	3.2%	1.3%	2.2%	1.4%	1.2%	1.1%	1.3%

APPENDIX C – DEMOGRAPHICS (CONTINUED)

	Q1			Q2			Q3			Q4		
	Total	Print	Ebook	Total	Print	Ebook	Total	Print	Ebook	Total	Print	Ebook
Total Yearly Household Income Before Taxes												
Under $15,000	5.8%	5.5%	6.4%	6.3%	6.7%	4.4%	5.5%	5.2%	5.7%	5.9%	6.0%	5.4%
$15,000-$24,999	10.2%	10.6%	8.0%	8.3%	8.2%	8.9%	9.3%	9.5%	5.0%	10.0%	9.8%	10.7%
$25,000-$34,999	8.8%	9.3%	5.3%	9.9%	10.3%	8.2%	10.1%	10.6%	6.4%	11.7%	11.7%	12.1%
$35,000-$49,999	13.5%	13.2%	13.9%	13.2%	13.8%	10.8%	15.1%	15.1%	16.4%	13.3%	13.9%	12.1%
$50,000-$74,999	19.3%	19.5%	18.7%	19.4%	19.2%	17.1%	22.7%	23.2%	19.3%	24.1%	23.4%	26.2%
$75,000-$99,999	14.5%	14.6%	15.5%	15.8%	15.7%	17.1%	15.7%	15.6%	19.3%	17.4%	17.8%	14.8%
$100,000-$149,999	10.9%	10.9%	11.2%	10.6%	10.9%	10.8%	12.8%	12.9%	13.6%	12.6%	12.6%	14.8%
$150,000 and over	5.6%	5.6%	8.0%	4.3%	3.9%	6.3%	4.8%	4.3%	7.9%	4.9%	4.9%	4.0%
Prefer not to answer	11.3%	10.9%	12.8%	12.1%	11.3%	16.5%	4.0%	3.5%	6.4%	0.0%	0.0%	0.0%
Born in Canada												
Yes	81.2%	81.1%	82.4%	82.2%	82.2%	82.3%	78.3%	78.4%	79.3%	79.2%	80.0%	75.8%
No	18.8%	18.9%	17.6%	17.8%	17.8%	17.7%	21.7%	21.6%	20.7%	20.8%	20.0%	24.2%

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."

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BookNet Canada
215 Spadina Ave.
Toronto, Ontario
M5T 2C7
www.booknetcanada.ca
research@booknetcanada.ca

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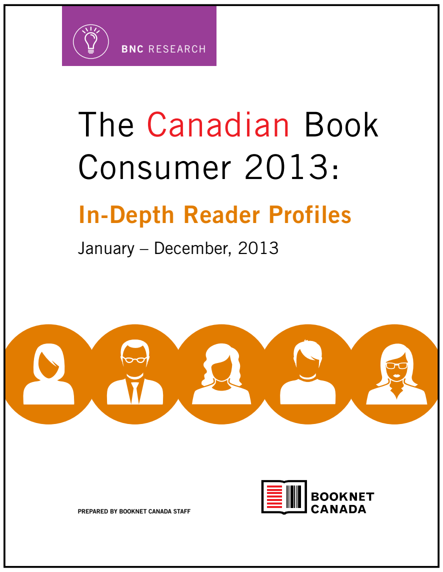
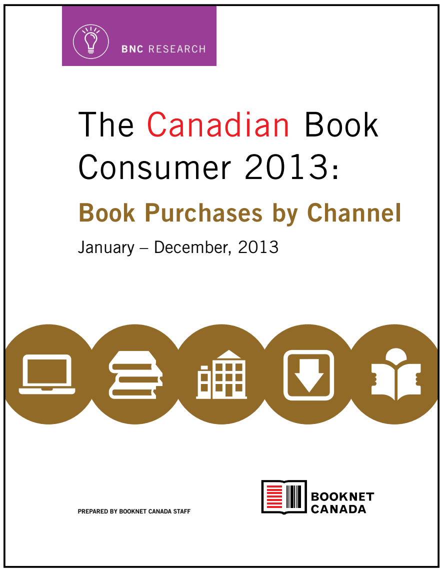
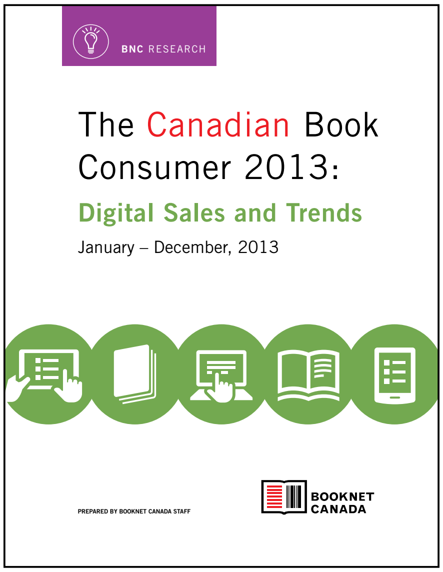
Meet the Canadian Book Buyer







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