



BNC RESEARCH

Deep Dive: The Cookbook Buyer

2016



BOOKNET
CANADA

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The Cookbook Buyer

About BookNet Canada's Deep Dive Series

BookNet Canada's Deep Dive Series takes an in-depth look at some of the biggest genres selling in Canada. The goal is for readers of these reports to have both an overview of sales patterns within the genre and a better understanding of the genre buyers themselves.

Data for these reports have been obtained through two primary sources:

- BookNet Canada's SalesData – representing approximately 85% of the trade market in Canada, SalesData tracks the weekly sale of print books across the country.
- BookNet Canada's Consumer Research – adult book-buying Canadians participate in online surveys about their book purchases from the prior month. Book buyers report on such information as what they purchased, where they made the purchase, what influenced their purchase, and other quantitative data. Buyers were surveyed from the beginning of 2015 to the fall of 2016. The data represents 95 buyers of Cookbooks and 109 book purchases.

Data for this survey focuses on both books purchased by adults and, when reviewing sales trends, the sale of adult titles.

Overview of the Cookbook Buyer

Arguably, more so than with any other genre, sales of Cookbooks could be seen through the lens of “a prevailing sense of doom.”¹ With so many recipes available online, at-home cooks have more options than ever before to access copious amounts of content for free.

In January 2017, *The Huffington Post* argued that, “just like TV didn’t kill the radio, online recipes have not rendered cookbooks obsolete. In fact, they have made them better.”² They made the case that Cookbooks are not just a collection of recipes; instead, they — like all books — are something that people want to read and learn from.

So, who buys Cookbooks? We find that it is men as much as women who are buying them, with 50.5% of buyers identifying as male.

The average Cookbook buyer is:

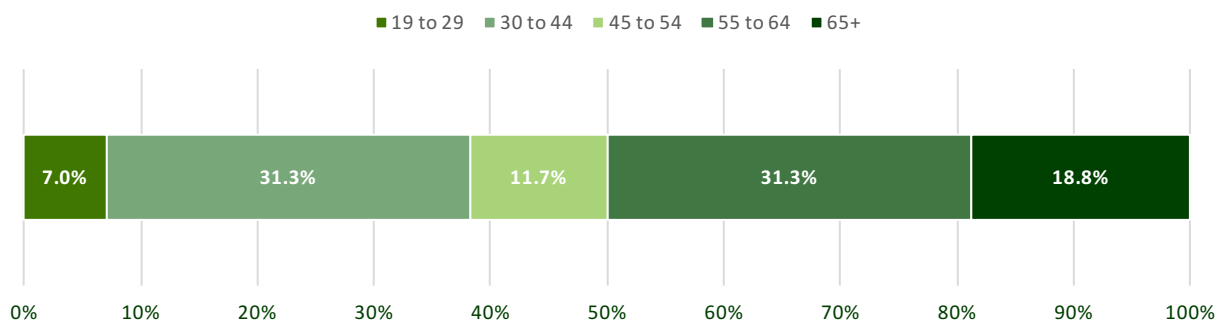
- just as likely to be male (50.5%) as female (49.5%);
- 51 years old;
- married;
- university-educated; and,
- more likely to reside in the Prairies (15%) than in Western Canada (10%).

¹ Rochlin, Margy. “What’s Up With The Cookbook Industry These Days”. *latimes.com*. Web. 4 November 2016. <http://www.latimes.com/food/dailydish/la-fo-cookbooks-20161026-story.html>

² “Cookbooks Are More Relevant Than Ever. Here’s Why.”. *The Huffington Post*. Web. January 19, 2017. http://www.huffingtonpost.com/entry/best-new-cookbooks_us_587f768ee4b0c147f0bbff8b

As the majority of Cookbook purchases are made by people between the ages 19 and 29 or 55 and 64, there seems to be an appeal for both older and younger markets. The graph below takes into account all 109 tracked purchases, so the age brackets that purchase in higher volume are more heavily represented.

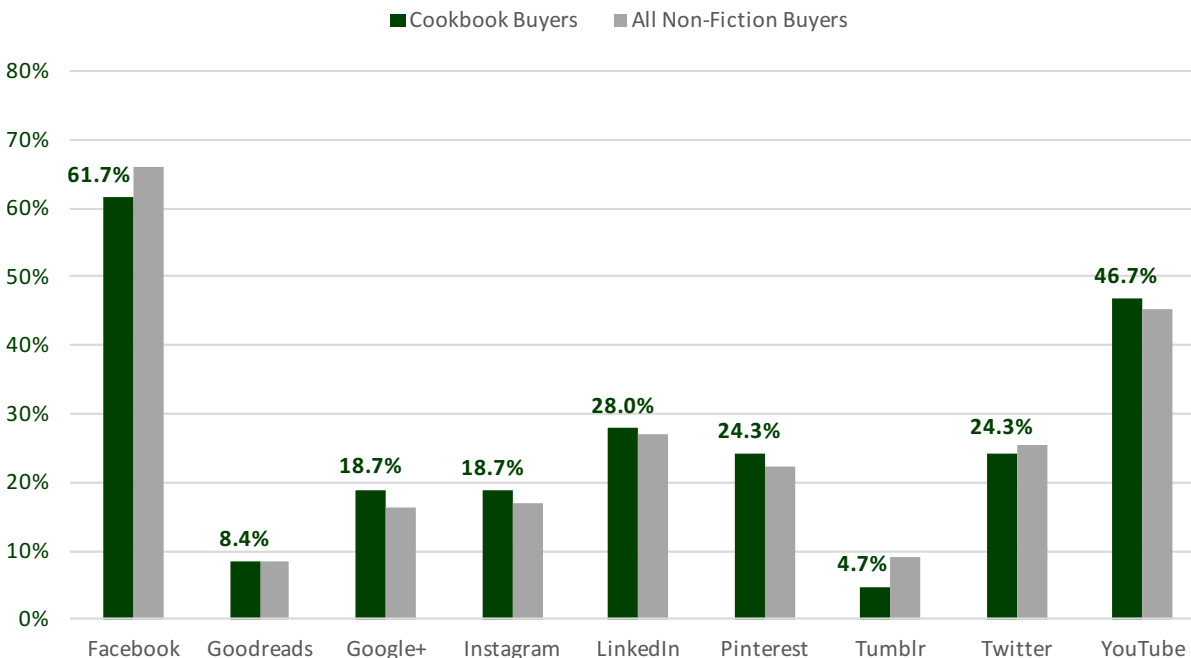
Cookbook Buyers by Age



How old are you? (N=128)

Cookbook buyers' use of social media is generally on par with the average Non-Fiction book buyer, with some minor exceptions. Comparatively, engagement is slightly lower with Facebook, Twitter, and Tumblr and higher with LinkedIn, Instagram, and Pinterest.

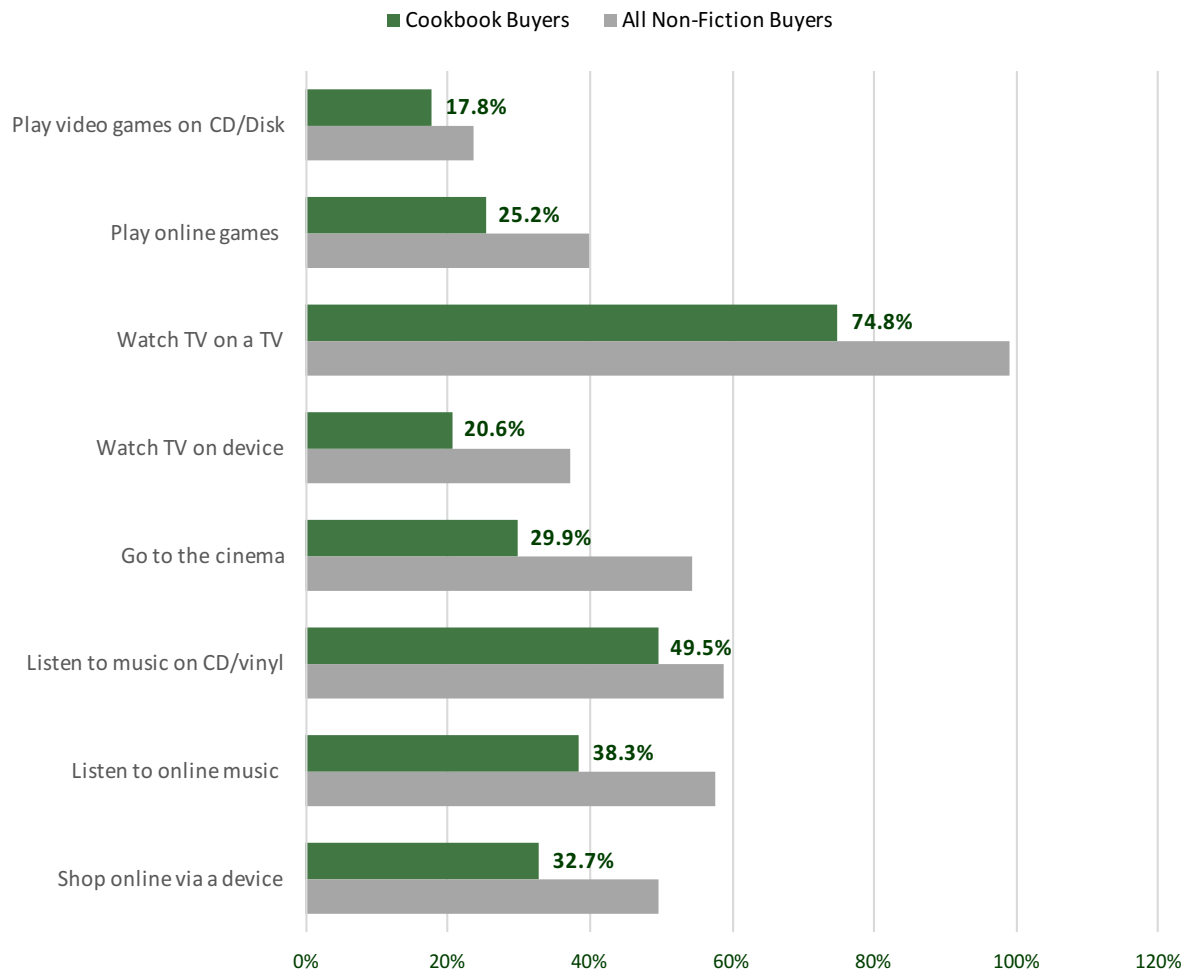
Use of Social Networks



In which of the following social networks, communities, or sharing sites do you currently participate?
(N=107, N=1,434)

Maybe Cookbook buyers spend more time in the kitchen (we are not sure about this one) but we do know that they spend considerably less time online, watching TV, listening to music, and going to the movies. Rankings are considerably lower than with the average Non-Fiction book buyer.

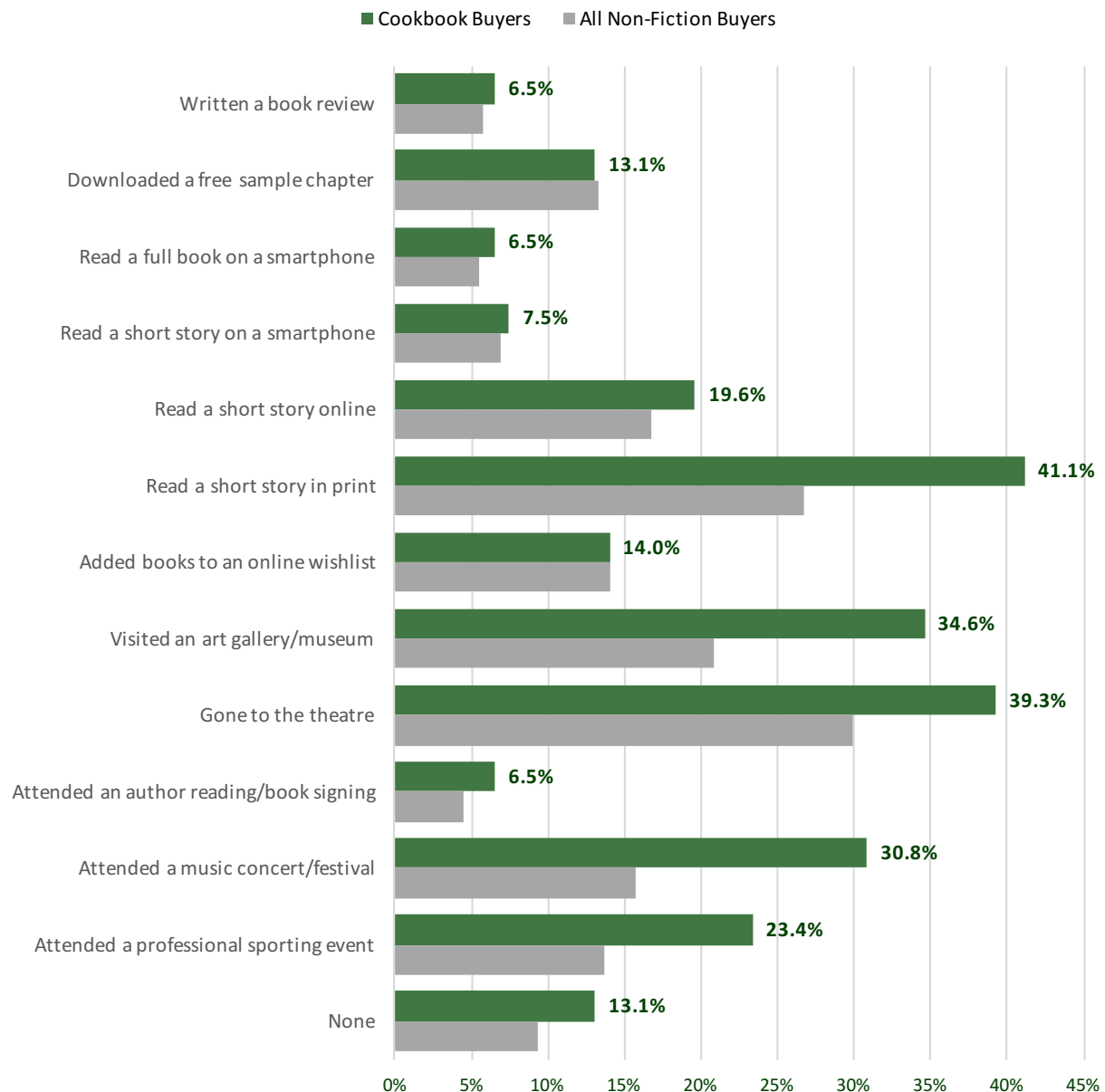
Activities Participated in Monthly



Which of the following activities do you do at least once in a typical month? (N=107, N=1,434)

Activities in Last 12 Months

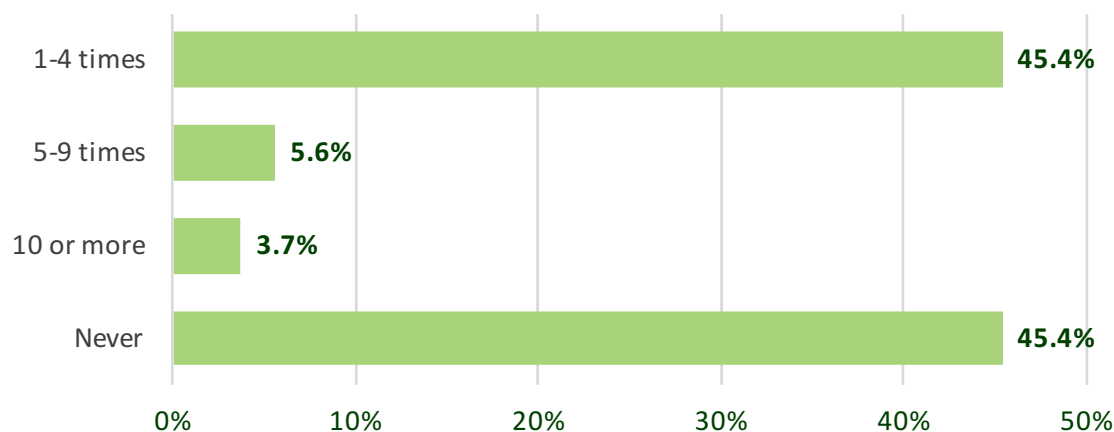
It turns out that Cookbook buyers predominately lean towards doing things in person. They spend notably more time attending book signings and other in-person events, such as going to the theatre, visiting art galleries and museums, and attending sporting events and music concerts. They are also more likely to read short stories, either in print or online.



Which of the following have you done in the last 12 months? (N=107, N=2,067)

More so than with any other group of book buyers in the Deep Dive series, Cookbook buyers are frequent library users with 55% using the library (either online or in person) in the last month.

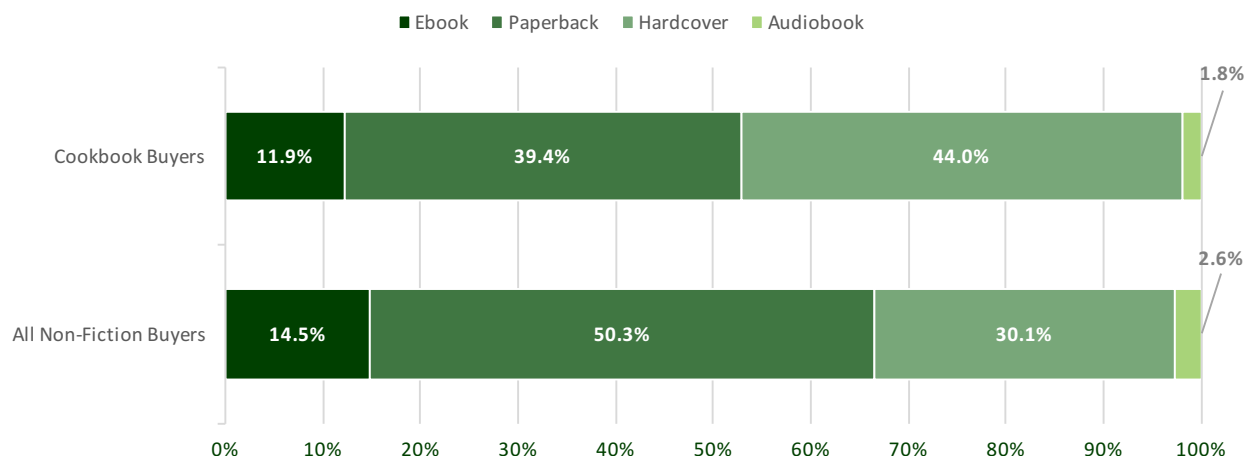
Use of Public Library



How many times have you visited the public library (online or in person) in the last month? (N=108)

Sales of Cookbooks are predominantly hardcover (44%), followed closely by paperback (40%). While preference for hardcover is notably higher than with the average Non-Fiction buyer — 44% versus 30% — it is interesting to see that the purchase of ebooks (12%) is not much lower than for the average Non-Fiction buyer (15%).

Format Distribution



What format is the book you purchased? (N=109, N=2,330)

The graph below looks not at whether Cookbook buyers participate in specific activities but rather the frequency at which they participate. For example, of all Cookbook buyers, 9.3% of them read ebooks daily and 20.6% of them read print books daily, both of which are less than the daily rates for general Non-Fiction buyers. Note that reading ebooks and print books here does not necessarily refer to reading Cookbooks, but just books generally.

Reading Frequency



How often do you engage in the following activities? (N=352, N=2,067)

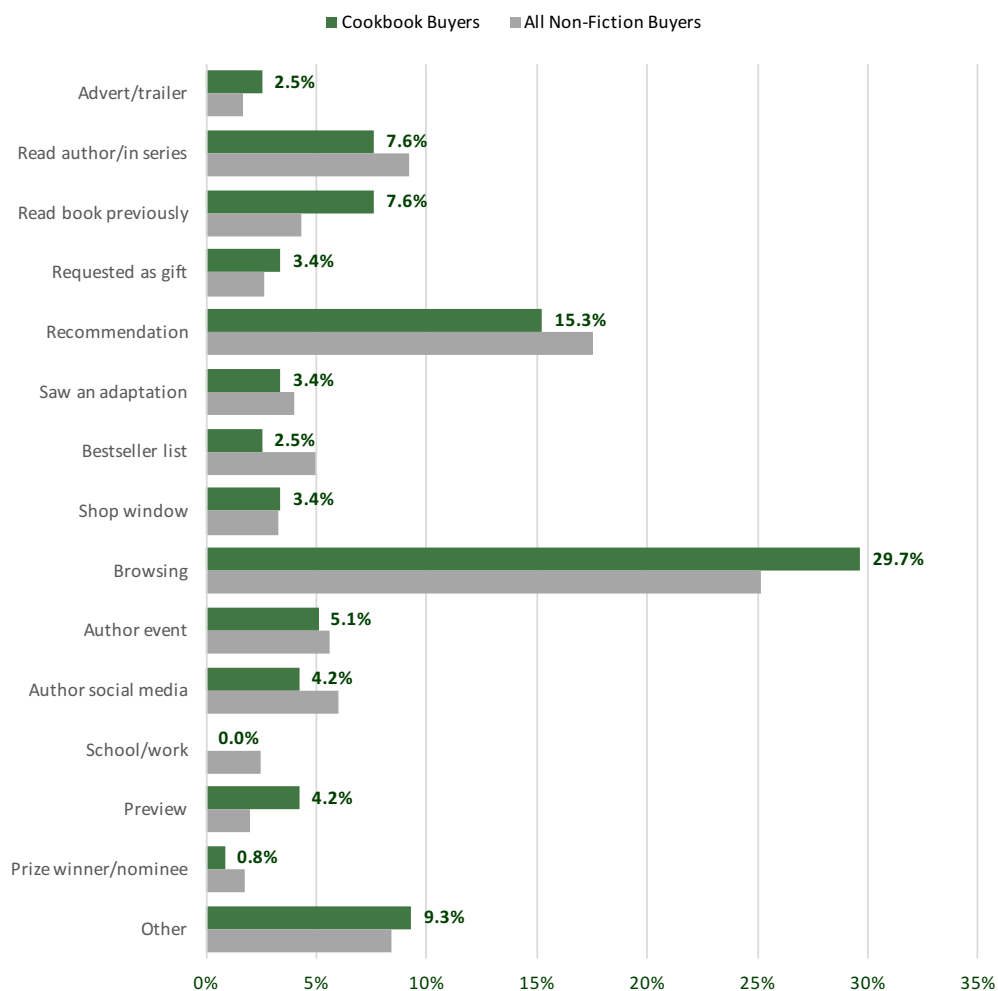
Discoverability and Decision to Buy

Book buyers must often choose amongst thousands of titles (or more), so how do they come to a decision? Below we take a look at some of the primary ways Cookbook buyers become aware of titles, where they make their purchases, and whether their purchases were planned or impulsive.

More so than with any other Non-Fiction subject reviewed for the Deep Dive series, Cookbook buyers find their books while browsing (29.7%). They are also more likely to find a book through the preview at the back of another book and much more likely to have read the book before.

Interestingly, while in-person recommendations still account for 15.3% of Cookbook purchases, this is less than for the average Non-Fiction buyer.

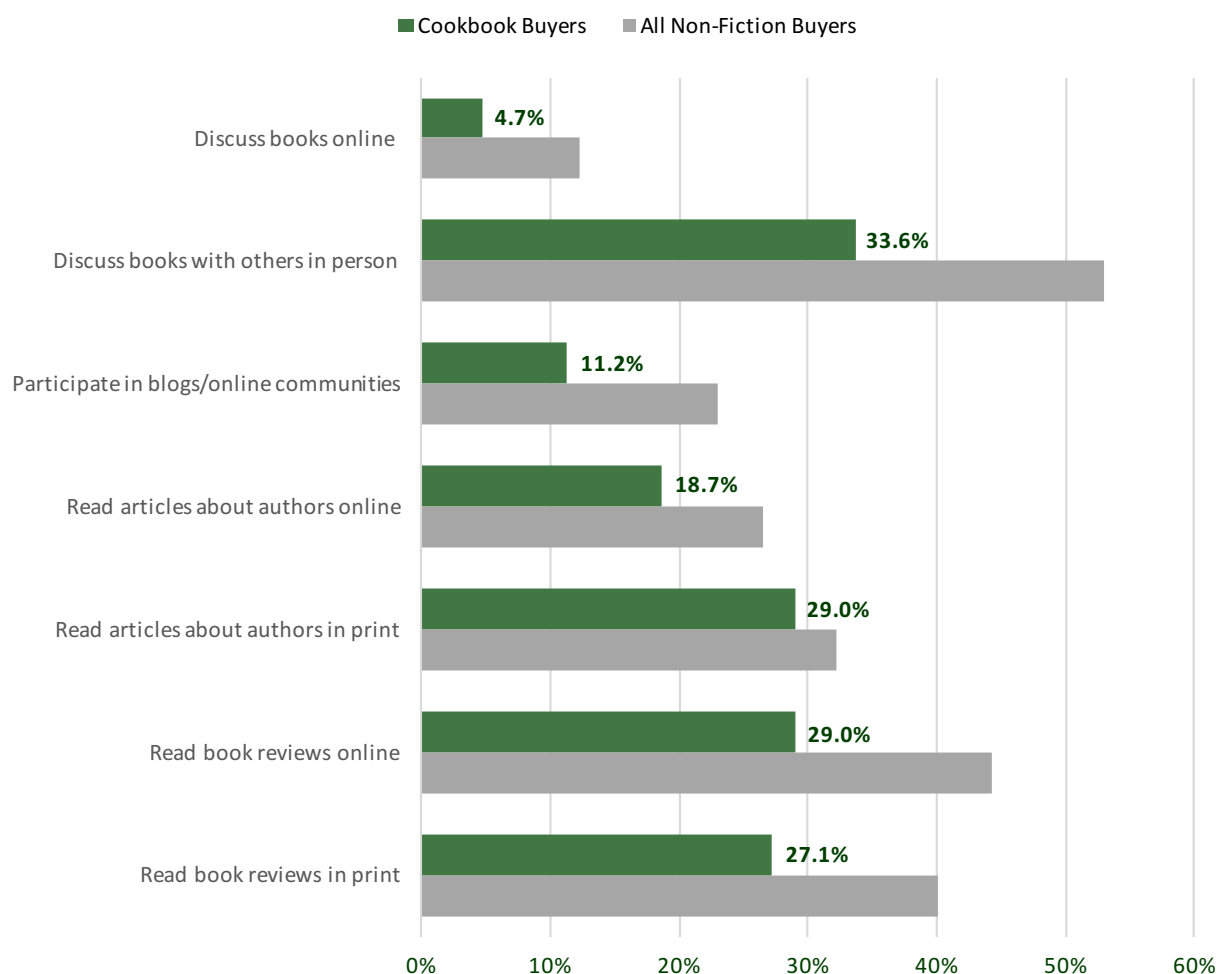
Awareness



How did you become aware of this book? (N=118, N=1,034)

Gauging awareness can be difficult because there are often multiple factors that cause a person to arrive at the decision to buy a particular book. A big part of that influence is determined by whether the book buyer participates in book-related activities — for example, do they discuss books online, read book reviews, or participate in online communities? For Cookbook buyers, we find that they are one of the least likely groups of Non-Fiction buyers to discuss books online (4.7%). Generally, online activities seem to rate lower than their print counterparts.

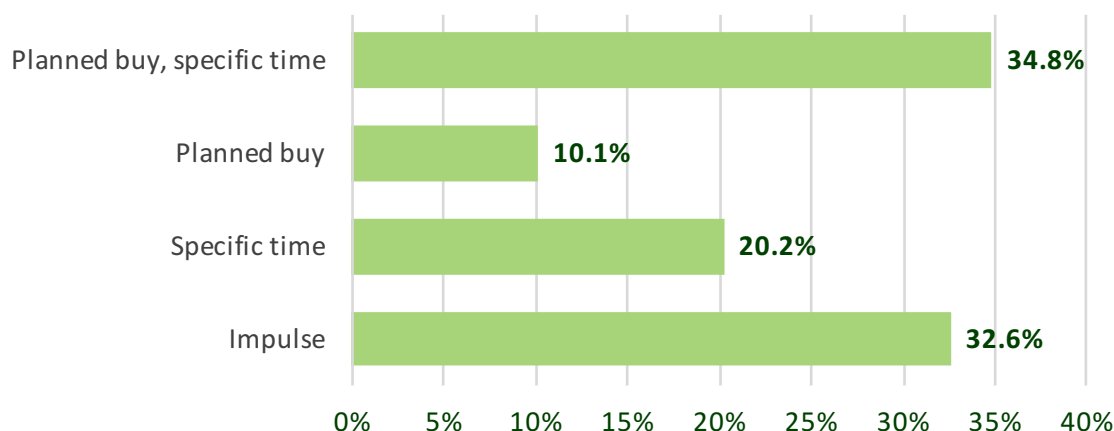
Book-Related Activities in a Typical Month



Which of the following activities do you do at least once in a typical month? (N=107, N=1,434)

When it comes to whether Cookbook buyers plan their purchases or are more impulsive in their buying habits, we find that while the majority (34.8%) of purchases were completely planned (i.e., the buyer planned to buy a specific book at a specific time), almost as many (32.6%) were completely impulsive (i.e., they did not plan to buy that specific or any book at that particular time). This impulsive behaviour is higher than for any other Non-Fiction category.

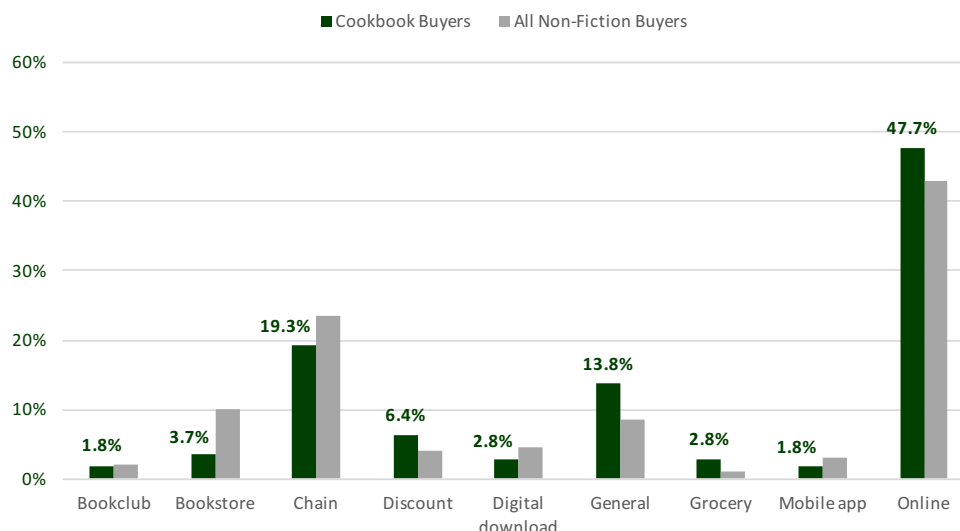
Impulse vs. Planned Purchase



Which of the following best describes your decision to buy this specific book at that time? (N=89)

When online, mobile app, and digital download purchases are combined, more than half of Cookbooks (52.3%) are purchased via a computer or device. Cookbook buyers are also much more likely than the average Non-Fiction buyer to shop in general retail outlets such as hardware stores, drug stores, or other non-book retail outlets.

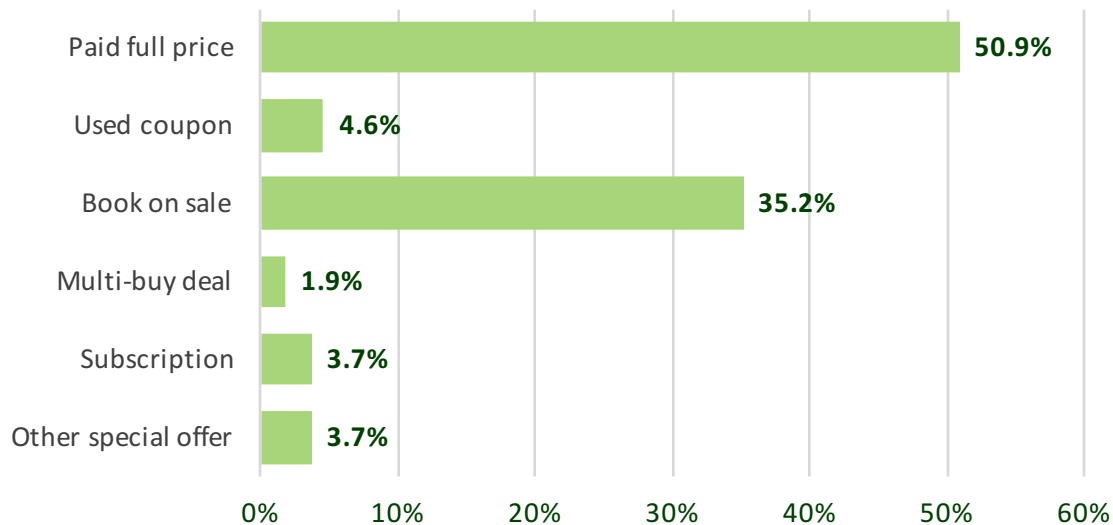
Purchase by Channel



How would you describe where you bought this book? (N=109, N=2,330)

Of all the subject categories that we reviewed for the Deep Dive series, Cookbook buyers are the least inclined to pay full price. While percentages don't fluctuate wildly between subjects, 62% of Self-Help buyers pay full price (the highest of all the subjects) compared to 51% of Cookbook buyers. It is likely due to the higher list prices for Cookbooks that buyers look for a deal.

Discounted Pricing



Did you buy the book at full price or did you buy it at a special price or offer? (N=108)

When asked if they thought the book they purchased was a good value, Cookbook buyers said 51% of their purchases were excellent value. This is very similar to the average Non-Fiction buyer at 53%.

When looking at how Cookbook sales translate from list price to selling price, broken out by format, we find a notable reduction in selling prices for print books. As outlined above, purchases of Cookbook ebooks (11.9%) and audiobooks (1.8%) are relatively low. Two things to keep in mind are: 1) these numbers are based on buyers' potentially unreliable recollections of what they paid, and 2) retailers often offer consumers discounts off the full retail/list price.

Using BiblioShare, BookNet Canada's bibliographic database, the average list prices for Cookbooks published in 2016, broken out by format, are as follows:

List Price

Hardcover	Paperback	Ebook	Audiobook
\$35.26	\$24.89	\$16.96	\$43.33

Selling Price

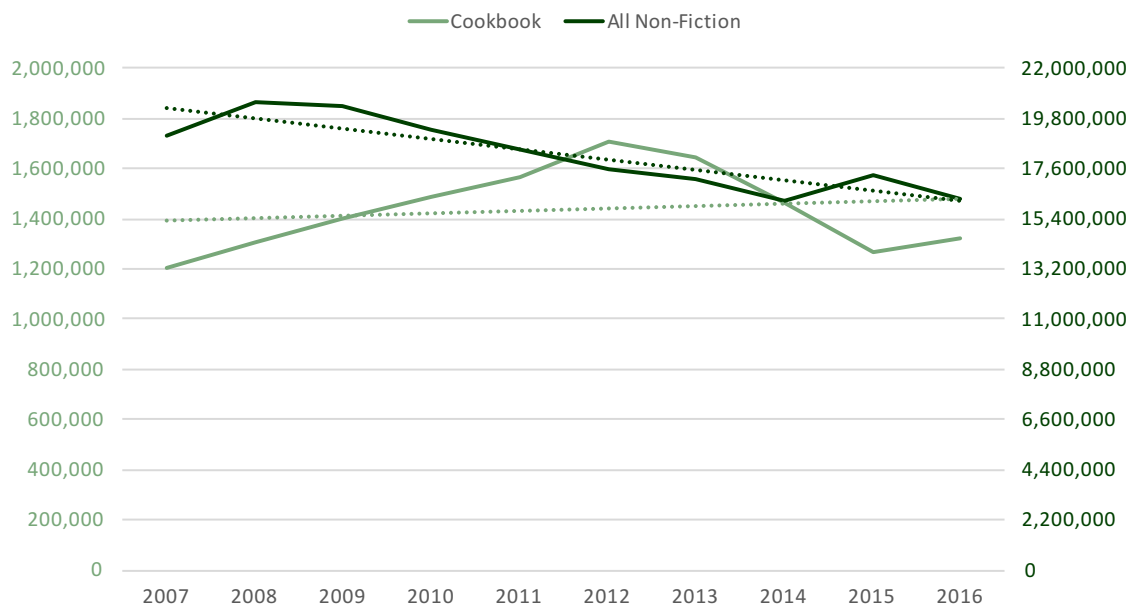
Hardcover	Paperback	Ebook	Audiobook
\$21.19	\$18.82	\$14.16	\$22.50

How much did you pay for this book (before tax)? (N=123)

Sales Analysis of the Cookbook Category

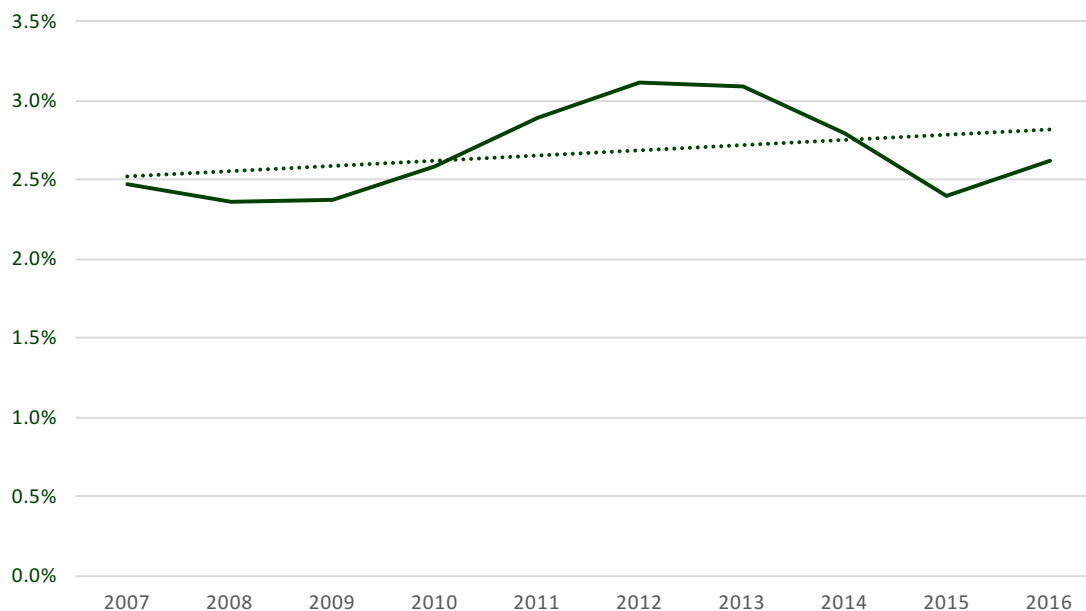
BNC SalesData has tracked the sale of print books in the trade market for more than 10 years. While the Non-Fiction print market has seen some decline over this time, the print Cookbook market, aside from a few fluctuations, has remained relatively flat. 2015 in particular saw a considerable decline but this rebounded somewhat in 2016.

Volume Sold



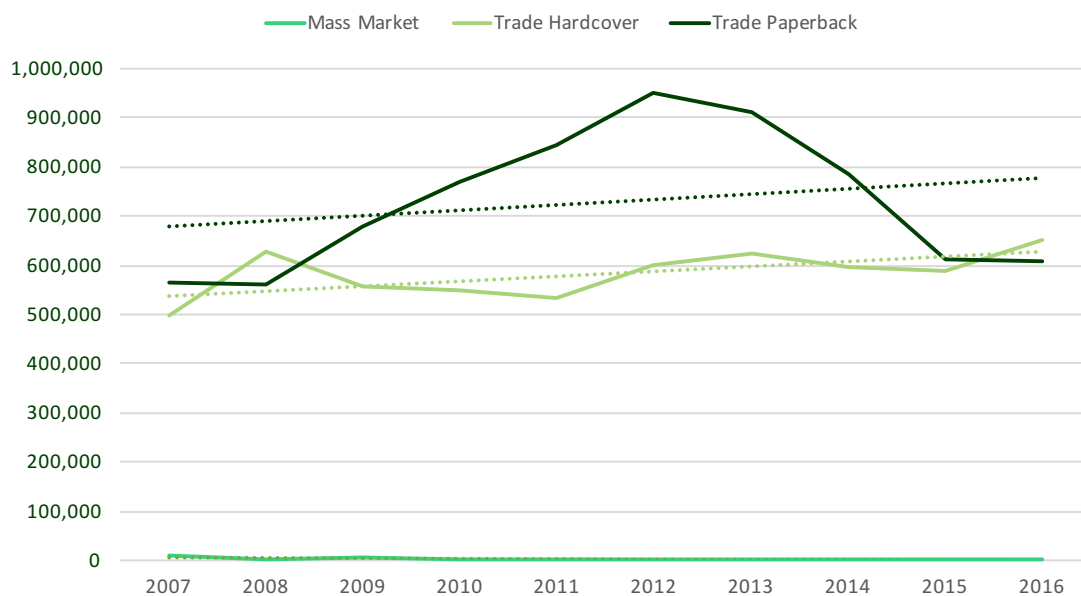
When we look at the Cookbook category's share of the overall print market, we see that it has increased slightly over the past 10 years.

Market Share



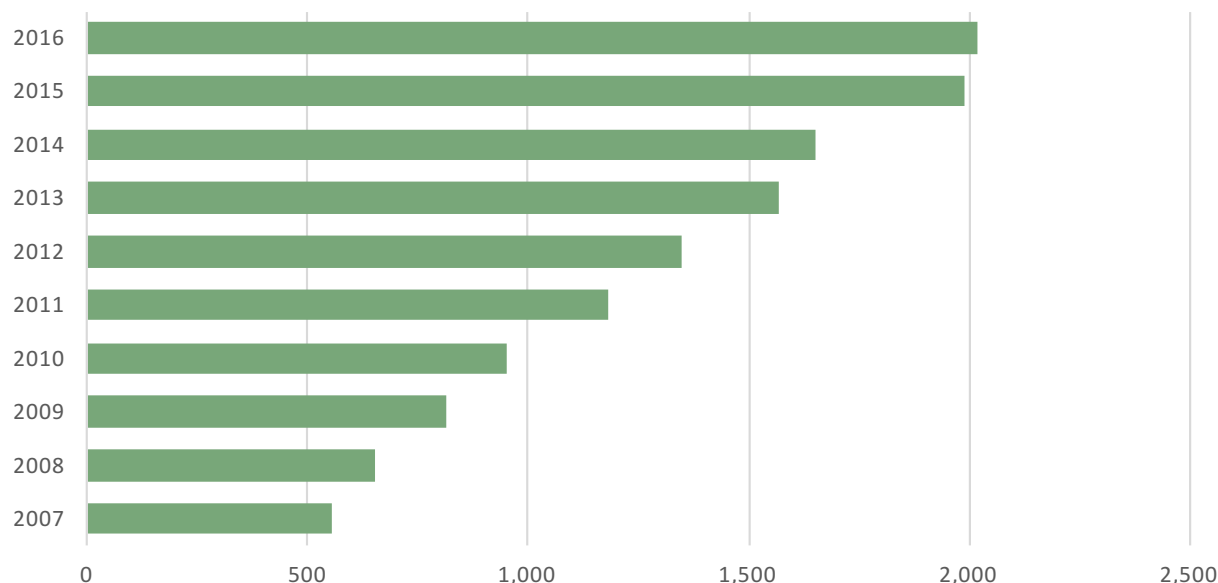
When we look at the sale of print Cookbooks by format over time, we find quite an interesting story: while Mass Market sales are unsurprisingly non-existent, we see a large increase of Trade Paperback sales through 2012, which is likely due to large sales of *The Looneyspoons Collection*, and a more recent increase of Hardcover sales.

Sales by Format



Sales of Cookbooks, which can range from practical manuals to coffee-table books, tend to be focused on the frontlist. The graph below shows the number of ISBNs that saw sales in 2016, according to their years of publication. Titles selling in 2016 predominantly have a 2016 or 2015 publication date with few books published prior to 2007 seeing sales.

Number of Titles Selling in 2016 by Publication Year



There are countless sites that will tell you which are the “essential” Cookbooks, the only ones you will ever need. Well, we decided to let the data speak for itself by taking a look at both the bestselling authors for the past two years and the most consistently selling Cookbooks for the past four years.

The top 10 bestselling Cookbook authors in Canada for 2015-2016 are:

1. Angela Liddon
2. Jamie Oliver
3. Thug Kitchen Staff
4. Michael Smith
5. Ina Garten
6. Ree Drummond
7. Jean Paré
8. Chrissy Teigen
9. Anthony Bourdain and Laurie Woolever
10. America's Test Kitchen Editors

Perennial bestsellers refer not to the top-selling books (i.e., books that have sold the most) but rather the most consistent bestsellers, year over year. The perennial bestsellers listed here were identified by searching for titles that ranked well every year from 2013 to 2016. If you are building a Cookbook section in a bookstore, these are the tried and true titles from the last four years. To be included on this list, a Cookbook title had to rank within the top 600 for each of the four years—a rank threshold that was determined by how widely we had to search to compile a list of 30 titles.

Top 30 Perennial Bestsellers

Title	Contributor	ISBN	Publisher	Binding	List Price	Pub Date
Wheat Belly Cookbook	Davis, William	9781443416337	HarperCollins	TP	\$24.99	18-12-2012
The Looneyspoos Collection	Podleski, Janet; Martin, Ted; Podleski, Greta	9780968063156	Granet Publishing	TP	\$34.95	01-10-2011
Back to Basics	Smith, Michael	9780143184102	Penguin Canada	TP	\$32.00	03-09-2013
15 Minute Meals	Oliver, Jamie	9781443429252	HarperCollins	HT	\$37.99	08-10-2013
The Juicing Bible	Crocker, Pat	9780778801818	Robert Rose Inc	TP	\$27.95	14-03-2008
Best of Bridge Slow Cooker Cookbook	Vaughan-Johnston, Sally	9780778804130	Robert Rose Inc	OB*	\$29.95	26-07-2012
Jerusalem	Ottolenghi, Yotam; Tamimi, Sami	9780449015674	Appetite by Random House	HT	\$39.95	16-10-2012
Gordon Ramsay's Home Cooking	Ramsay, Gordon	9781455525256	Grand Central Publishing	HT	\$42.00	09-04-2013
Ottolenghi	Ottolenghi, Yotam; Tamimi, Sami	9780449015773	Appetite by Random House	HT	\$35.00	03-09-2013
Butter Baked Goods	Daykin, Rosie	9780449015834	Appetite by Random House	HT	\$35.00	15-10-2013

Top 30 Perennial Bestsellers continued

Title	Contributor	ISBN	Publisher	Binding	List Price	Pub Date
The Soup Sisters Cookbook	Hapton, Sharon; Lamielle, Pierre A.	9780449015599	Appetite by Random House	TP	\$22.95	02-10-2012
Ricardo	Larivee, Ricardo	9781443424059	HarperCollins	HT	\$34.99	22-10-2013
The Smitten Kitchen Cookbook	Perelman, Deb	9780449015797	Appetite by Random House	HT	\$35.00	30-10-2012
At Home with Lynn Crawford	Crawford, Lynne	9780143187066	Penguin Canada	TP	\$32.95	17-09-2013
Betty Crocker Cookbook	Betty Crocker Editors	9781118072240	Houghton Mifflin Harcourt	OB*	\$30.99	02-04-2013
Fifty Shades of Chicken	Reage, Pouline; Fowler, F. L.	9780385345224	Potter/TenSpeed/Harmony	HT	\$22.99	13-11-2012
The Ultimate Student Cookbook	Goodall, Tiffany	9781554076024	Firefly Books	TP	\$14.95	22-01-2010
Jamie's Food Revolution	Oliver, Jamie	9781401310479	Hyperion Press	TP	\$29.99	05-04-2011
The China Study Cookbook	Campbell, LeAnne	9781937856755	BenBella Books	TP	\$23.00	07-05-2013
Canadian Living - The Vegetarian Collection	Canadian Living Test Kitchen Staff; Kent, Alison	9780981393803	Transcontinental Books	TP	\$22.95	14-09-2010
Mastering the Art of French Cooking	Child, Julia; Bertholle, Louise; Beck, Simone	9780375413407	Knopf Doubleday Publishing	HT	\$45.00	16-10-2001
The Smoothies Bible	Crocker, Pat	9780778802419	Robert Rose Inc	TP	\$27.95	04-02-2010
Canada's Diabetes Meals for Good Health	Graham, Karen	9780778804024	Robert Rose Inc	TP	\$29.95	15-03-2012
Whitewater Cooks with Friends	Adams, Shelley	9780981142418	Shelley Adams	TP	\$39.58	01-01-2011
Smoking Meat	Phillips, Jeff	9781770500389	Whitecap Books	TP	\$29.95	27-04-2012
La Mijoteuse	Ricardo	9782897050528	Edition La Presse	HT	\$39.95	01-10-2012
Veganomicon	Moskowitz, Isa Chandra; Romero, Terry Hope	9781569242643	Da Capo Press	HT	\$32.50	02-11-2007
The World Atlas of Wine	Robinson, Jancis	9781845336899	Octopus Publishing	HT	\$65.00	08-10-2013
Better Homes and Gardens Year-Round Slow Cooker Recipes	Better Homes and Gardens Books Staff	9781118217788	Houghton Mifflin Harcourt	HT	\$41.99	24-01-2013
Slow Cooker Recipes	Pare, Jean	9781895455373	Company's Coming Publishing	OB*	\$16.99	09-01-1998

*Other Book Formats