



BNC RESEARCH

Deep Dive:

The Fantasy Book Buyer

2016



BOOKNET
CANADA

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The Fantasy 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 print 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 496 Fantasy book buyers representing 761 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 Fantasy Buyer

With Kazuo Ishiguro recently winning the Nobel Prize for Literature, the debate as to what deems a work of fiction literary or genre has been (re-)ignited – specifically, is Ishiguro a Fantasy, Science Fiction, or Literary Fiction writer? The same can be asked about Margaret Atwood, Emily St. John Mandel, and many, many others.

The lines between Fantasy, Science Fiction, and what is sometimes called “speculative fiction” can be blurry. But for Fantasy, writers such as George R.R. Martin and the immense success of *Game of Thrones* are challenging the way that people think of the Fantasy genre. In 2009, *The Guardian* wrote that “most people still regard [Fantasy] as the preserve of lonely men who know a little bit too much about computers and not quite enough about personal hygiene.” The article goes on to talk about how Science Fiction readers have it easy in comparison to Fantasy readers – those who dwell in the world of trolls, dwarfs, and dragons.

There has been a lot of debate around the BookNet Canada office as to which other book buyer the Fantasy reader most closely resembles. Initial thoughts were that the profile would be very similar to the Science Fiction buyer while others thought they would be more similar to Romance buyers, who tend to be voracious readers and very focused on frontlist.

So, who buys Fantasy books? Demographically, the average Fantasy buyer is quite similar to the average Science Fiction buyer, except for the fact that Science Fiction is a stronger seller on the west coast as compared to Fantasy in the Prairies.

The average Fantasy buyer is:

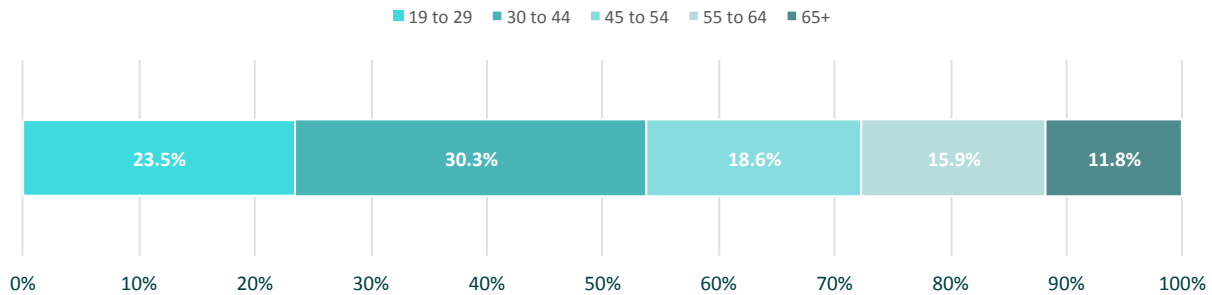
- male (58%);
- 46 years old;
- married;
- has a university degree; and,
- resides across Canada — fantasy readers are slightly more likely to live in the Prairies (15.4%) and least likely to live in the Maritimes (10.7%).

Fantasy generally appeals to buyers of all ages but there is a slightly higher following among those aged 30-44 (30.3%) with 53.8% of buyers falling between the ages of 19 and 44. The graph below takes into account all Fantasy book purchases reported by respondents, so the age brackets that purchase in higher volume are more heavily represented.

¹ Kobie, Nicole. “Who cares if Kazuo Ishiguro is a sci-fi genre writer or not?” <http://www.wired.co.uk/article/kazuo-ishiguro-nobel-prize-literature>. Oct. 6, 2017.

² Jordison, Sam. “Let’s stop sneering at fantasy readers.” <https://www.theguardian.com/books/booksblog/2009/jun/22/fantasy-readers-gemmell-award>. June 22, 2009.

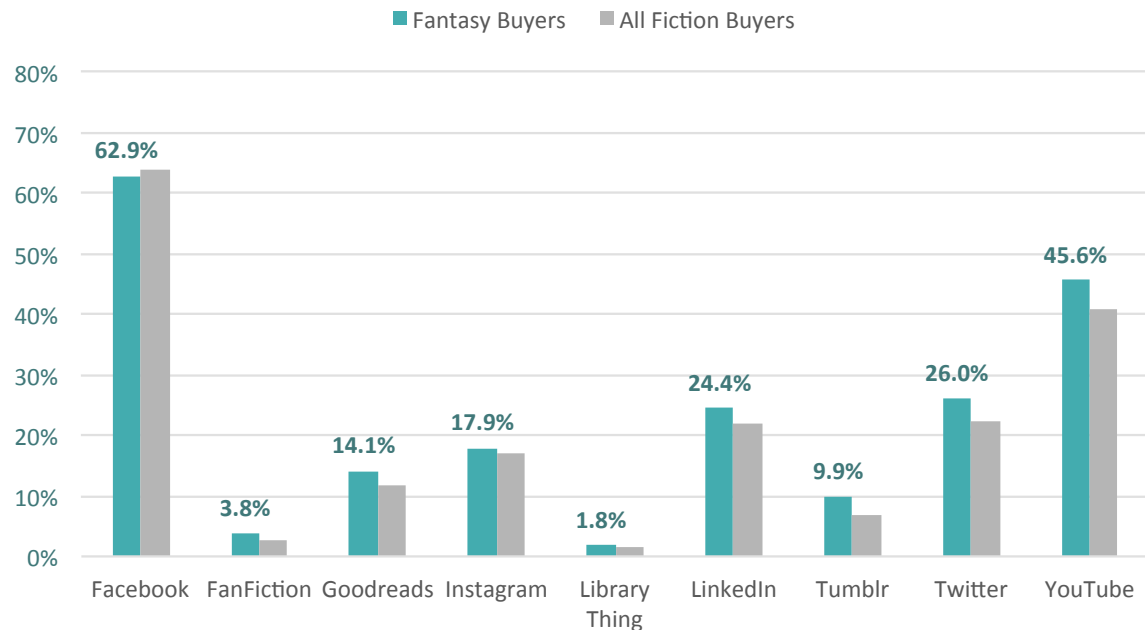
Fantasy Purchases by Buyer's Age



How old are you? (N=485 purchases)

Use of social networks indicates that Fantasy buyers are technologically engaged. While use of Facebook is generally on par with the average Fiction buyer (63%), use of platforms such as Goodreads, YouTube, Twitter, and Tumblr tend to trend higher.

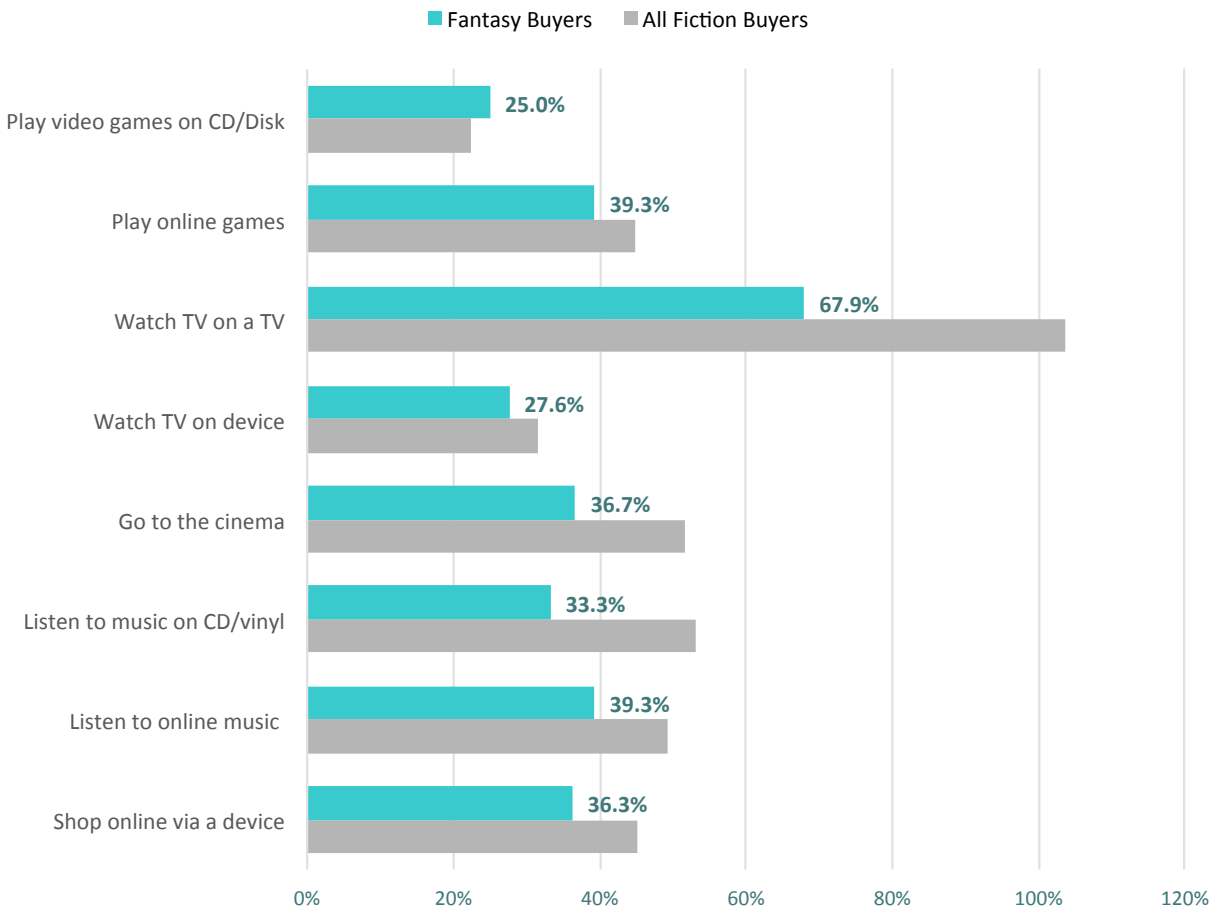
Use of Social Networks



In which of the following social networks, communities, or sharing sites do you currently participate? (Please select all that apply.) (N Fantasy=496 respondents, 1,024 responses; N All Fiction=2,769 respondents, 5,212 responses)

When asked about activities that were engaged in during the prior month, Fantasy buyers were less likely than average Fiction buyers to play video and online games, go to the movies, watch television (on a television), listen to music, and shop online. While they tend to be more engaged technologically in social media, they are less engaged when it comes to pursuing digital entertainment.

Activities Participated in Monthly

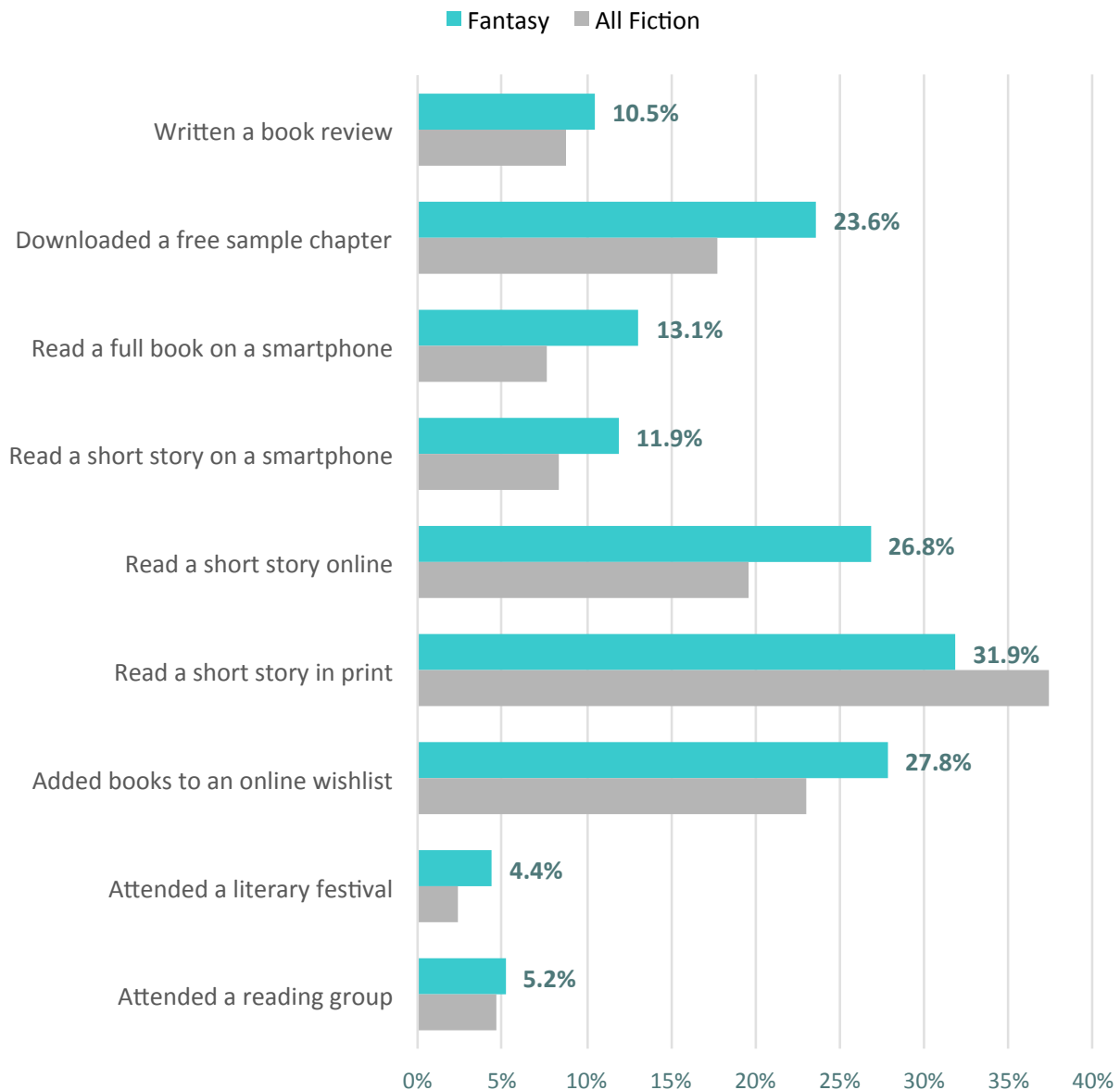


*Which of the following activities do you do at least once in a typical month?
(Please select all that apply.) (N Fantasy=496 respondents, 1,515 responses;
N All Fiction=2,769 respondents, 11,111 responses)*

For all of the time that Fantasy book buyers don't spend playing online games, they are diligent with their online book-related activities. Looking at activities in the past 12 months, Fantasy buyers are notably more likely than the average Fiction buyer to download a free sample chapter (24%), read a full book or short story on their smartphone, and add books to an online wishlist (28%).

When it comes to Fantasy buyers reading short stories, in the past year 27% read a short story online and 32% read one in print. Interestingly, a much higher share of Fantasy buyers read short stories online versus the average Fiction buyer, though they trend lower than the average Fiction buyer when it comes to reading short stories in print.

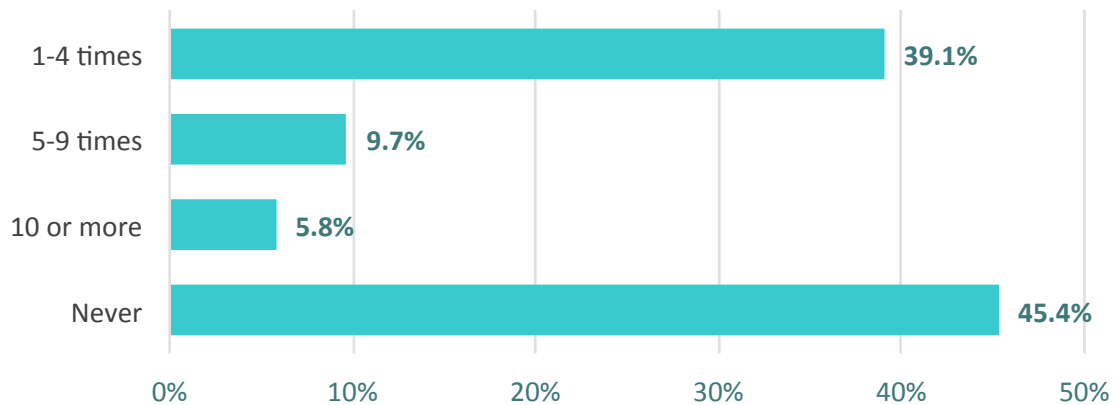
Activities in Last 12 Months



Which of the following have you done in the last 12 months? (Please select all that apply.) (N Fantasy=496 respondents, 859 responses; N All Fiction=2,769 respondents, 4,035 responses)

Fantasy buyers are fairly active library users with 55% of them using their public library. In the prior month, 39% used the library four or more times, either in person or online, and 16% used it five or more times during that time period.

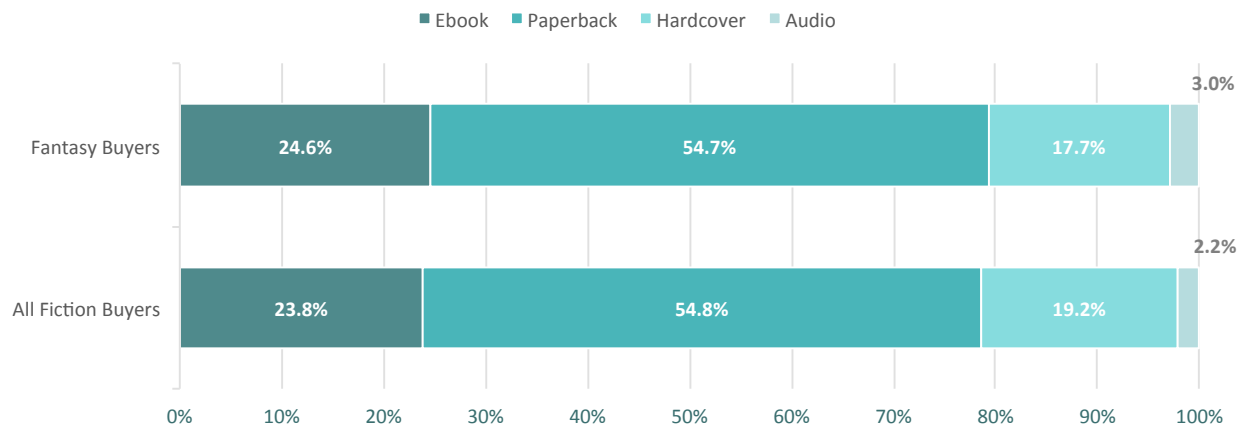
Use of Public Library



How many times have you visited the public library (online or in person) in the last month? (N=496 responses)

When it comes to the purchase of specific formats, Fantasy buyers are almost exactly on par with average Fiction book buyers. Science Fiction buyers, as a comparison, purchase fewer hardcover books (14% Science Fiction compared to 18% Fantasy) and more ebooks (32% Science Fiction compared to 25% Fantasy).

Format Distribution

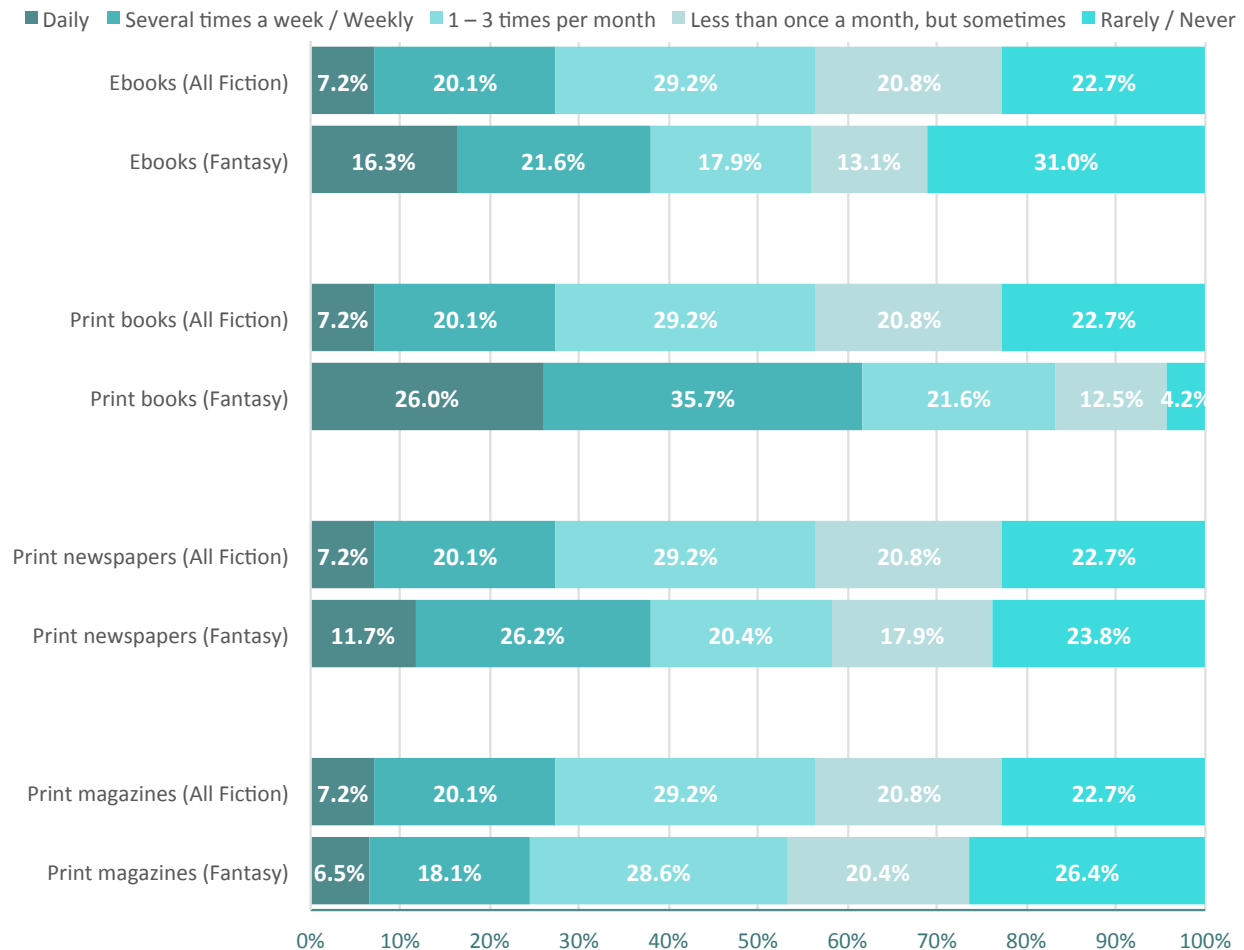


What format is the book you purchased? (N Fantasy=772 purchases; N All Fiction=5,807 purchases)

The graph below looks not at whether Fantasy buyers participate in specific activities but rather the frequency at which they participate. For example, of all Fantasy buyers who read ebooks, 16% of them read ebooks daily; of all Fantasy buyers who read print books, 26% of them read print books daily. Note that reading ebooks and print books here does not necessarily refer to reading Fantasy books, but just books generally.

This data demonstrates a predisposition towards print, as the Fantasy buyer reads print books at a higher frequency than the average Fiction buyer.

Reading Frequency

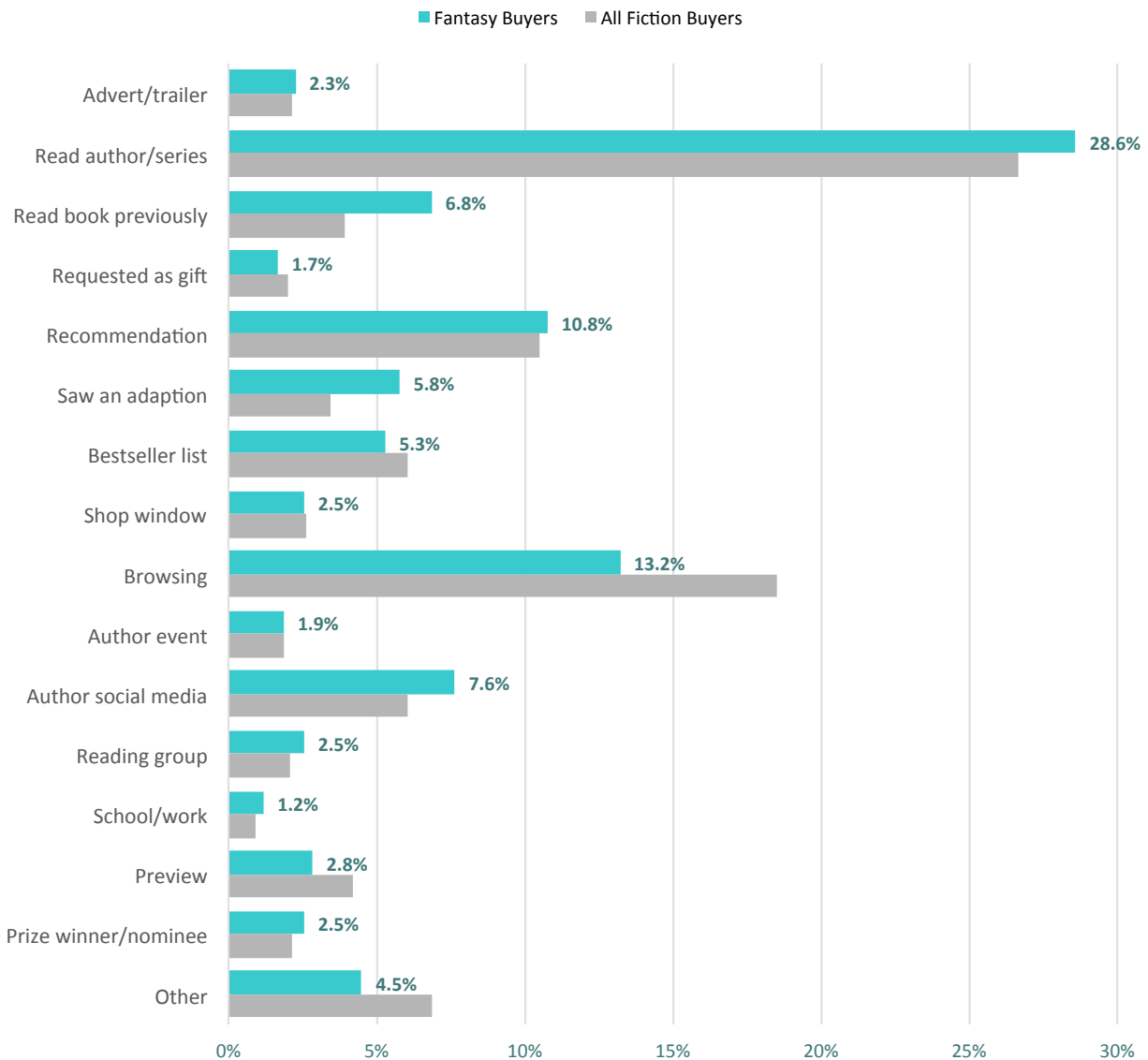


How often do you engage in the following activities? (N Fantasy=496 respondents;
N All Fiction=3,796 respondents)

How do Fantasy book buyers find out about books? While there are a few mechanisms of discoverability that are similar to the average Fiction buyer — recommendation at 10.8% and finding the book through an advertisement, trailer, or email alert at 2.3% — there are a few areas where Fantasy buyers differ from the average Fiction buyer:

- 29% of Fantasy buyers have previously read the author or series.
- Only 13.2% found their book through browsing compared to 19% of average Fiction buyers.
- 8% heard about the book through the author's social media, compared to 6% of average Fiction buyers.
- 6% saw the film or another adaptation of the book.

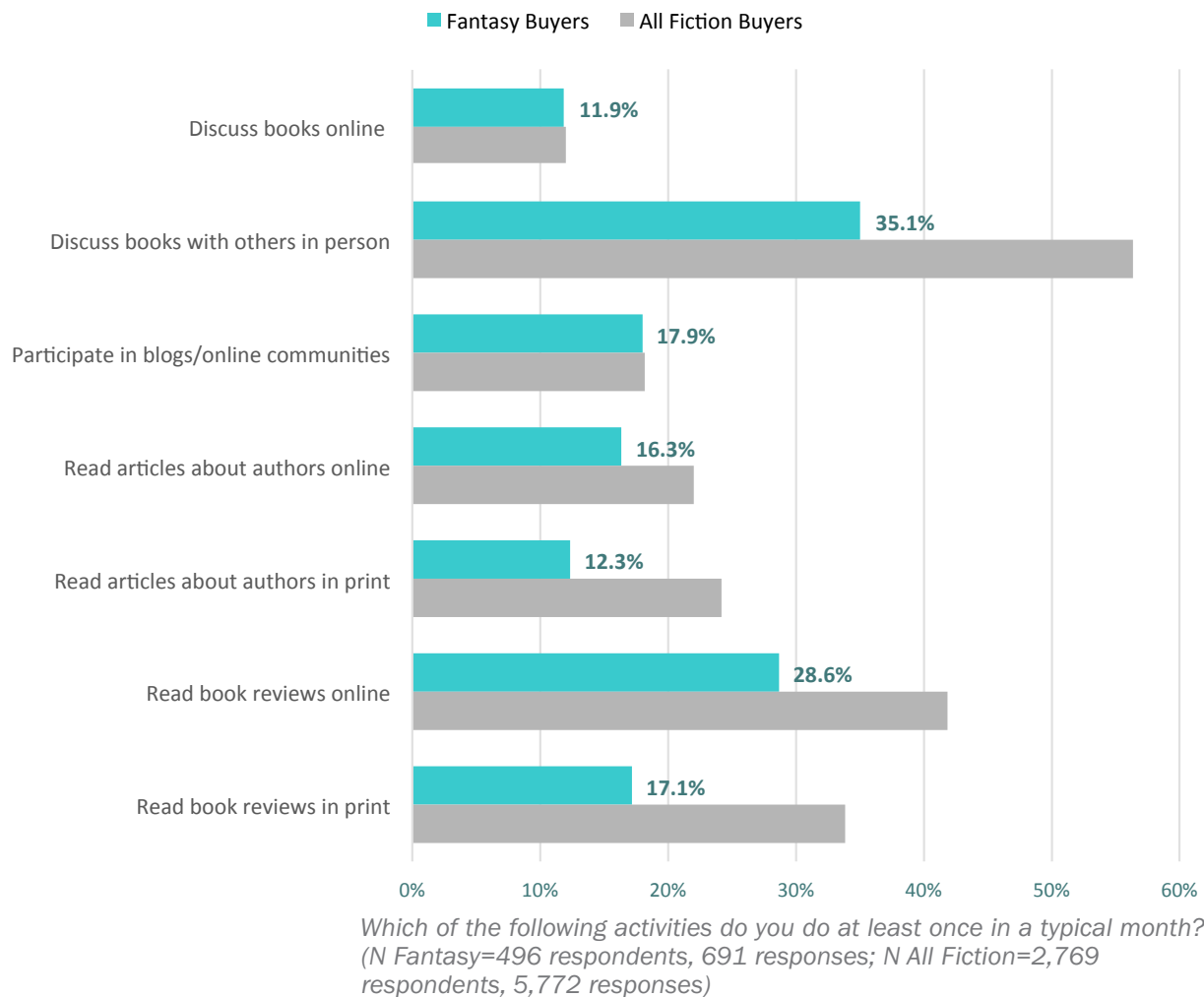
Awareness



How did you become aware of this book? (Please select all that apply.) (N Fantasy=1,022 purchases; N All Fiction=7,422 purchases)

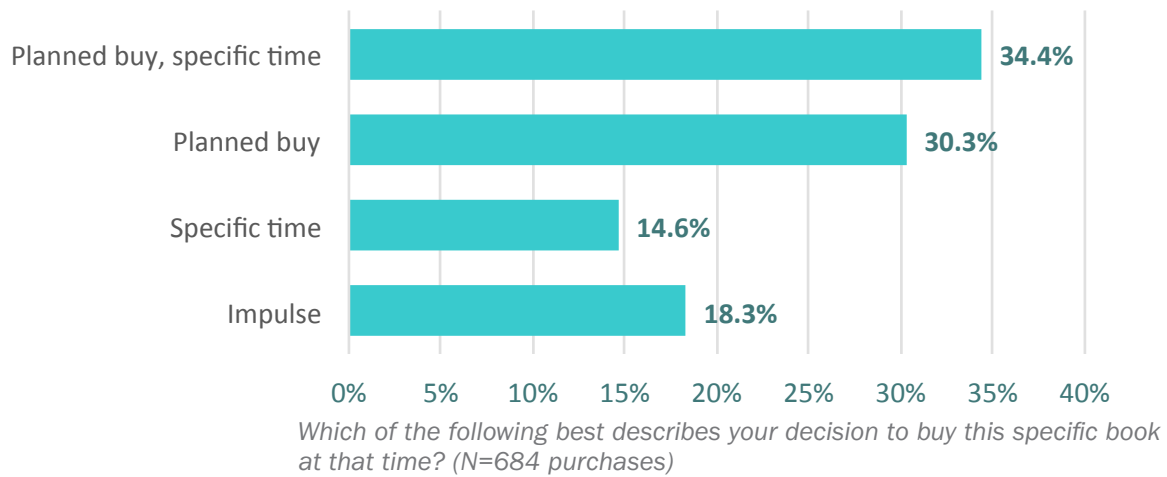
Reading is, perhaps, a solitary endeavor with Fantasy buyers; they are notably less inclined than average Fiction buyers to discuss books with others in person. They also tend to shy away from reading articles about authors in print (12%). While many do read book reviews online (29%), the share is notably lower than with the average Fiction buyer. They are also much less likely than the average Fiction buyer to read book reviews in print (17%).

Book-Related Activities Participated in During Prior Month



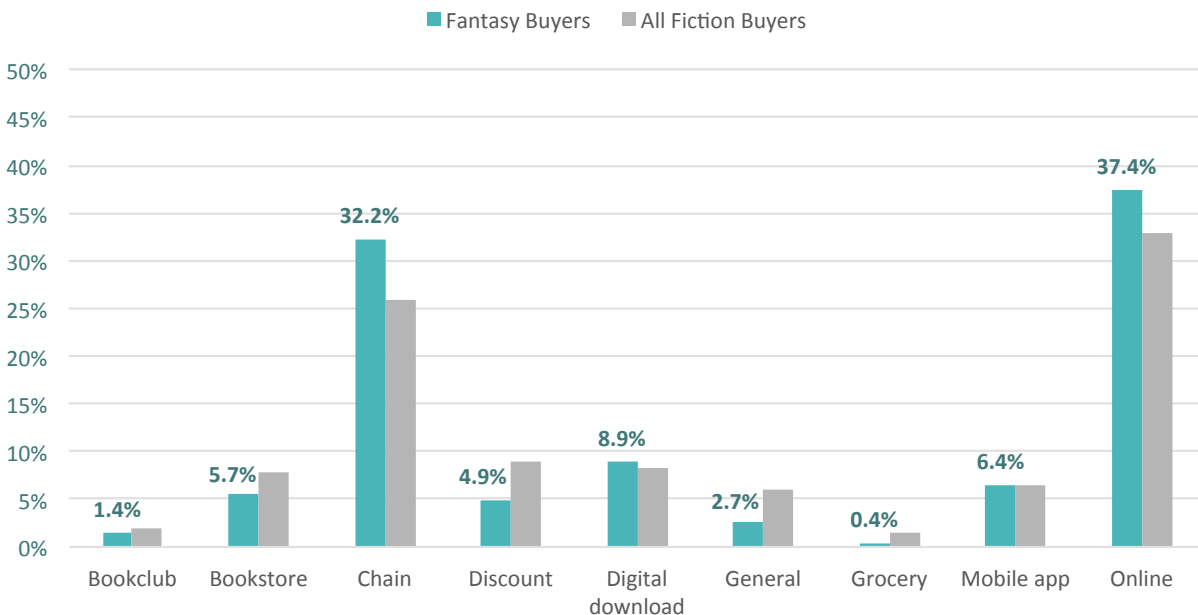
When it comes to making purchases, Fantasy buyers are planners, with 34% of purchases fully planned. This means that they not only plan to buy a specific book but they also plan to purchase that book at a specific time. Meanwhile, 30% planned to buy the book that they purchased but not at that specific time. Only 18% of purchases were completely impulsive, meaning that they were not planning to buy that book, or any book, at the time of purchase.

Impulse vs. Planned Purchase



When we combine digital download, online, and mobile app purchases, together they account for 53% of all Fantasy purchases. Fantasy book buyers, perhaps because of the wider selection of available titles, are much more likely to shop at large chain stores (32%) or online (37%) than average Fiction buyers.

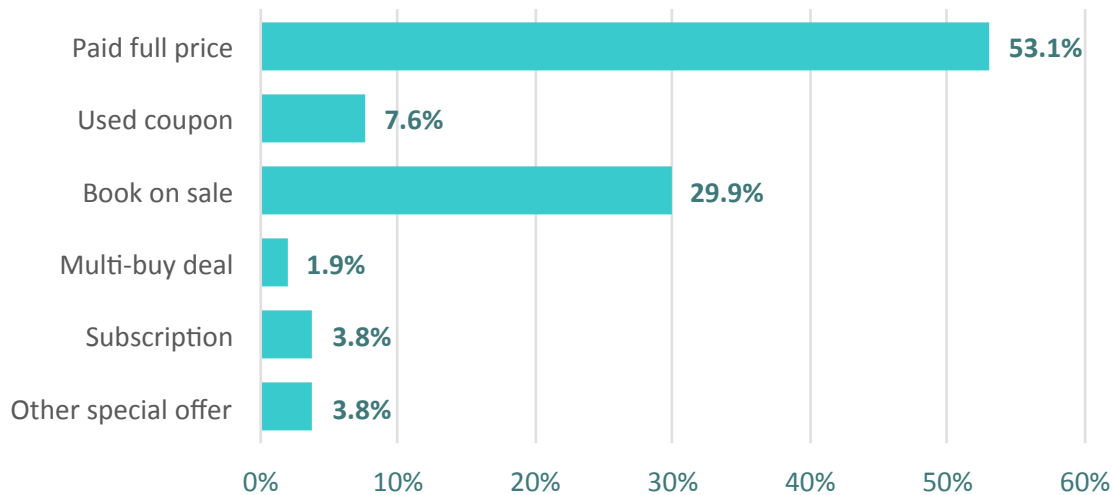
Purchase by Channel



How would you describe where you bought this book? (N Fantasy=776 purchases; N All Fiction=5,848 purchases)

The majority of Fantasy buyers are paying full price for their purchases (53%), while 4% are accessing their books via subscription, which is slightly lower than average Fiction buyers (5%).

Discounted Pricing



Did you buy the book at full price or did you buy it at a special price or offer? (N=793 purchases)

When asked if they thought the book they purchased was a good value, 53% said their purchase was of “excellent” value and 40% said it was of “good” value; both of these were about on par with all of the genres studied in the Deep Dive series.

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

List Price

Hardcover	Paperback	Ebook	Audiobook
\$35.42	\$18.22	\$10.22	\$25.68

When we asked respondents what price they paid for their Fantasy books, we found that most prices were notably reduced from the list prices above. One exception is ebooks, which was about on par with the list price. 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.

Selling Price

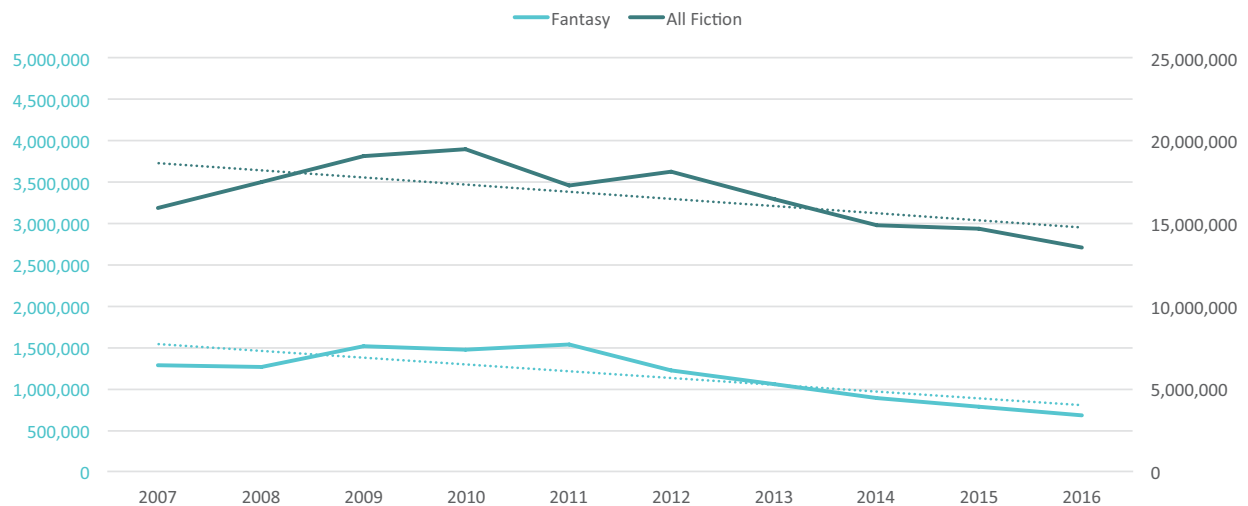
Hardcover	Paperback	Ebook	Audiobook
\$17.99	\$12.83	\$9.65	\$18.90

How much did you pay for this book (before tax)? (N=508 purchases)

Sales Analysis of the Fantasy Category

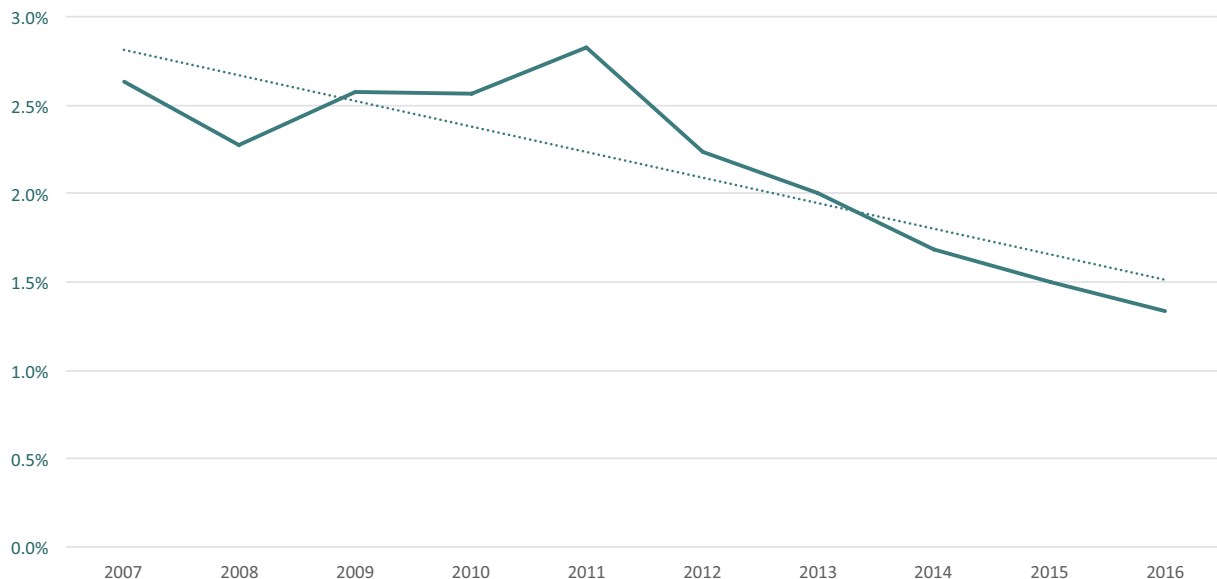
BNC SalesData has tracked the sale of print books in the Canadian trade market for more than 10 years. Looking at the sale of Fantasy books across this 10-year period, we see an annual decline in volume sold.

Volume Sold



Market share looks at what percentage of the market is “owned” by any particular category. Again, looking at the print market only, we find that market share for Fantasy has been declining over the past 10 years, landing at just over 1.5% of the market in 2016.

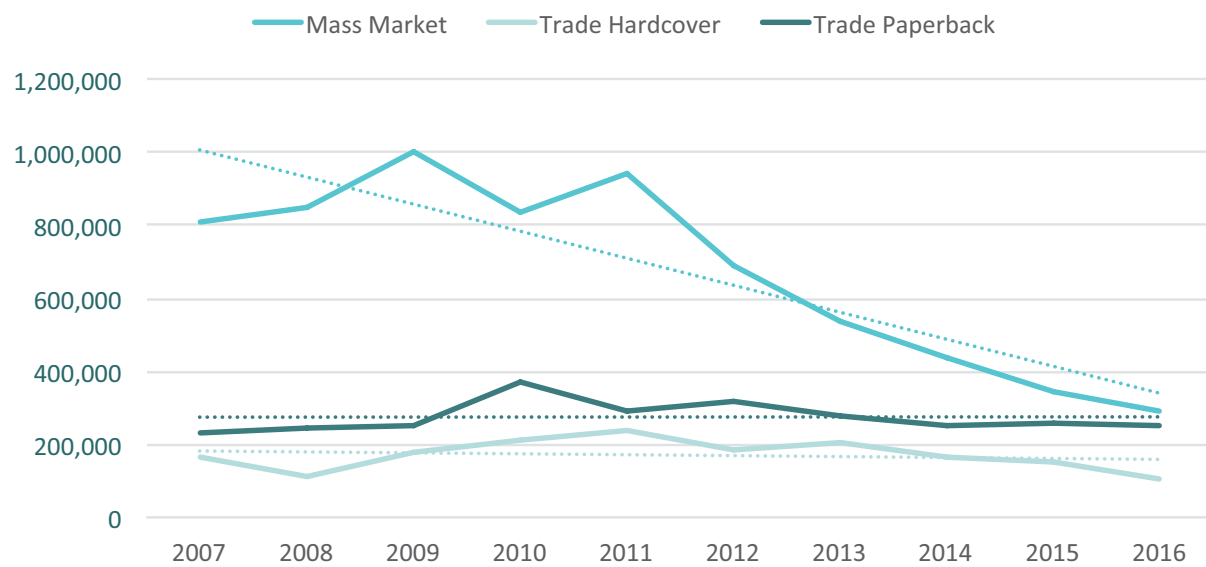
Market Share



When it comes to breaking down sales by format over the past 10 years, we find that most of the decline in units sold is due to a decline in mass market. Though BNC SalesData does not track the sale of ebooks, we can make an educated guess from looking at consumer data and talking to publishers of Fantasy books that much of the mass market format has shifted to digital (i.e., ebooks). Canadian consumers really began purchasing ebooks in 2009/2010, and much of this purchasing has been focused in the 'genre' fiction subjects: Mystery, Romance, Fantasy, and Science Fiction.

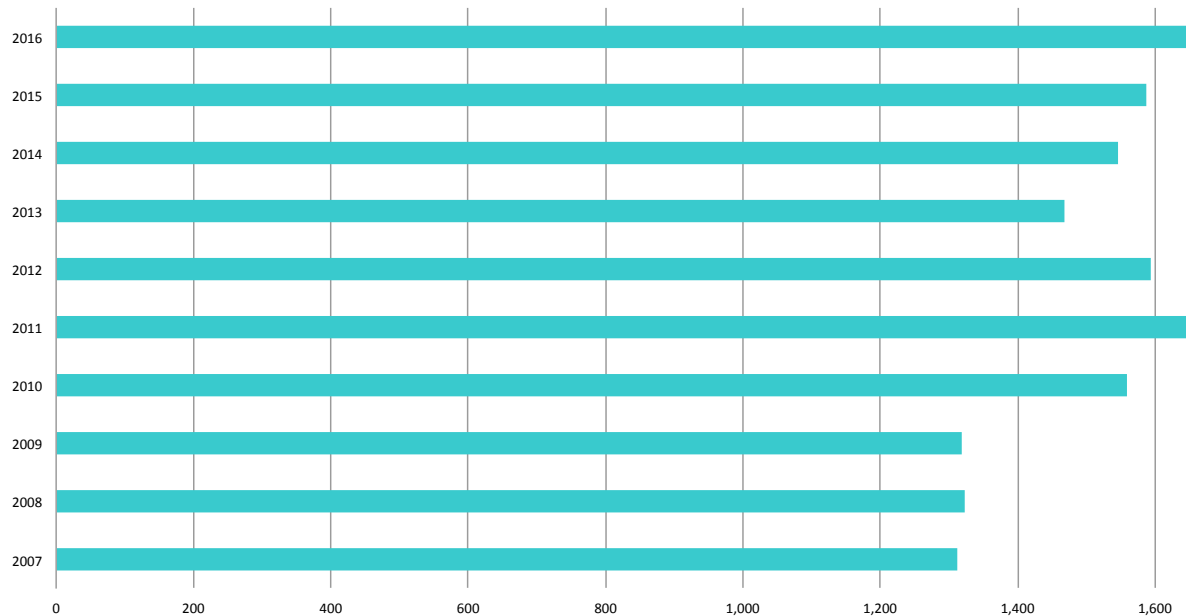
By comparison, sales of trade paperback and hardcover Fantasy books have remained fairly flat over this 10-year period.

Sales by Format



The graph below breaks out overall sales by year of publication. This allows us to take a look at how a category may be either frontlist or backlist heavy. In the case of Fantasy, sales of 2016 titles are slightly higher than sales of titles from previous years but tracked sales for titles dating back to 2007 were still selling well through 2016, which indicates a strong backlist.

Volume of Titles Selling in 2016 by Publication Year



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

1. George R.R. Martin
2. Patrick Rothfuss
3. R.A. Salvatore
4. Brandon Sanderson
5. Kelley Armstrong
6. Jim Butcher
7. Terry Brooks
8. Terry Goodkind
9. Terry Pratchett
10. Andrzej Sapkowski

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 Fantasy section in a bookstore, these are the tried and true titles from the last four years. To be included on this list, a Fantasy title had to rank within the top 300 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	Format	List Price	Pub Date
A Dance with Dragons	Martin, George R. R.	9780553582017	Random House	MM	\$11.99	29-10-2013
A Feast for Crows	Martin, George R. R.	9780553582024	Random House	MM	\$11.99	26-09-2006
Eve of Darkness	Day, Sylvia	9780765337481	Tom Doherty Associates, LLC	TP	\$18.50	08-01-2013
A Dance with Dragons	Martin, George R. R.	9780553385953	Random House	TP	\$21.00	29-10-2013
A Game of Thrones	Martin, George R. R.	9780553381689	Random House	TP	\$21.00	28-05-2002
The Wind Through the Keyhole	King, Stephen	9781451658095	Pocket Books	MM	\$12.99	26-02-2013
A Storm of Swords	Martin, George R. R.	9780345543981	Wizards of the Coast	HT	\$29.95	05-03-2013
A Feast for Crows	Martin, George R. R.	9780553582031	Random House	TP	\$21.00	28-05-2002
A Storm of Swords	Martin, George R. R.	9780553381702	Random House	TP	\$24.00	22-03-2011
The Long Earth	Baxter, Stephen; Pratchett, Terry	9780552167239	Tom Doherty Associates, LLC	MM	\$11.99	04-10-2011
Towers of Midnight	Jordan, Robert; Sanderson, Brandon	9780765364876	DAW	TP	\$25.00	06-03-2012
The Wise Man's Fear	Rothfuss, Patrick	9780756407124	Tom Doherty Associates, LLC	MM	\$11.99	26-11-2013
Wards of Faerie	Brooks, Terry	9780345523488	Penguin Publishing	HT	\$31.00	02-07-2013
The Warded Man	Brett, Peter V.	9780345518705	Random House	MM	\$10.99	23-03-2010
A Game of Thrones	Martin, George R. R.	9780553103540	Random House	HT	\$41.00	01-08-1996
Deadhouse Gates	Erikson, Steven	9780553813111	Transworld Publishers Ltd	MM	\$13.99	27-11-2001
Forge of Darkness	Erikson, Steven	9780857501356	HarperCollins Publishers	MM	\$9.99	01-11-1998
The Desert Spear	Brett, Peter V.	9780345524140	Penguin Publishing	MM	\$10.99	30-07-2013
The Dwarves	Heitz, Markus	9780316049443	Little, Brown & Co	MM	\$11.00	01-11-2008
Shadow's Edge	Weeks, Brent	9780316033657	Penguin Publishing	MM	\$8.99	27-03-2012
Beyond the Shadows	Weeks, Brent	9780316033664	ECW Press	HT	\$26.95	01-09-2012
Dragon Keeper	Hobb, Robin	9780061561658	Orion Publishing Group, Ltd	TP	\$14.99	08-03-2007
The Great Hunt	Jordan, Robert	9780812517729	Tom Doherty Associates, LLC	MM	\$11.99	28-09-2010
Memories of Ice	Erikson, Steven	9780553813128	Doubleday Canada	MM	\$11.99	21-08-2012
Stormdancer	Kristoff, Jay; Kristoff, Jay	9781250031280	Penguin Publishing	HT	\$37.00	15-10-2013
Furies of Calderon	Butcher, Jim	9780441012688	Random House	MM	\$9.99	30-04-2013
Chronicles of the Black Company	Cook, Glen; Cook, Glen	9780765319234	Transworld Publishers Ltd	TP	\$12.99	23-07-2012
The Wheel of Time Set	Jordan, Robert	9780812538366	Bloomsbury Publishing USA	TP	\$14.63	18-01-2011
The Dragon Reborn	Jordan, Robert; Jordan, Robert	9780812513714	Tom Doherty Associates, LLC	MM	\$9.99	30-07-2013