



BNC RESEARCH

Deep Dive: The Historical Fiction Book Buyer



**BOOKNET
CANADA**

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The Historical Fiction Book 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 summer of 2017. The data represents 406 Historical Fiction book buyers representing 421 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 Historical Fiction Book Buyer

In a 2016 article for *Publishers Weekly*, “Why Historical Fiction Will Never Go Away,” Justin O’Donnell writes that “the genre isn’t vanishing—it’s changing.” He argues that in order make Historical Fiction seem a bit sexier, it is being published under other genres. With there also being much debate on the accuracy of Historical Fiction and whether it actually does need to be historically accurate (emphasis on fiction), there may be something to calling at least some Historical Fiction by a different name.

But the numbers we are seeing in the Canadian print market paint a different picture. We are finding that the size of the print Historical Fiction category, while declining slightly in volume and in market share, is actually declining less than the overall Fiction category as a whole. In 2017, we even saw a notable increase in Historical Fiction sales, partially due to the sales of blockbuster titles such as Kate Quinn’s *The Alice Network*.

With successful television tie-ins for properties such as Diana Gabaldon’s *Outlander* series, Bernard Cornwell’s *The Last Kingdom* series on Netflix, and Hilary Mantel’s *Wolf Hall*, it may be that television adaptations of Historical Fiction are serving the category’s market well. Movies have seen a similar uptake with titles such as *The Other Boleyn Girl* based on Philippa Gregory’s *White Queen* series and Shrabani Basu’s *Victoria & Abdul*.

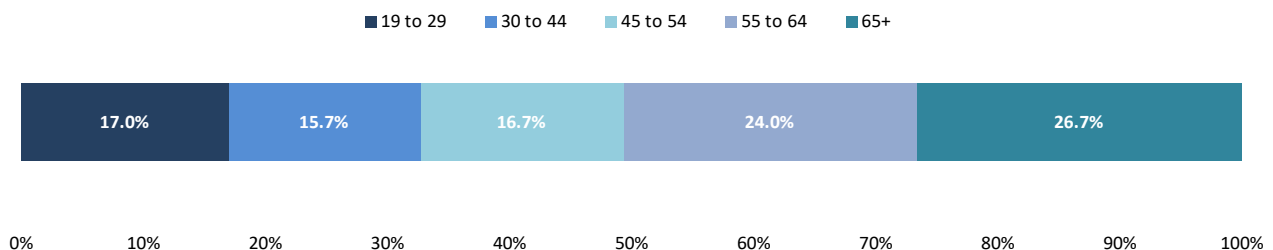
¹ O’Donnell, Justin. *Publishers Weekly*. “Why Historical Fiction Will Never Go Away.” <https://www.publishersweekly.com/pw/by-topic/columns-and-blogs/soapbox/article/71440-why-historical-fiction-will-never-go-away.html>. March, 26 2018.

So, who buys Historical Fiction books? The average Historical Fiction buyer is:

- more likely to identify as female (57.8%) than male (42.2%);
- 53 years old;
- married;
- more likely to live in the city (50.5%) than in the suburbs (30.4%);
- university educated; and,
- more likely to reside in Central Canada (54.5%) than in the Prairies (18.8%).

Historical Fiction appeals fairly equally to buyers of all ages, but there is slightly higher representation among those aged 55 and up (50.7%) with more than a quarter (26.7%) of all purchases reported by buyers 65 and older. The graph below takes into account all Historical Fiction book purchases reported by respondents, so the age brackets that purchase in higher volume are more heavily represented.

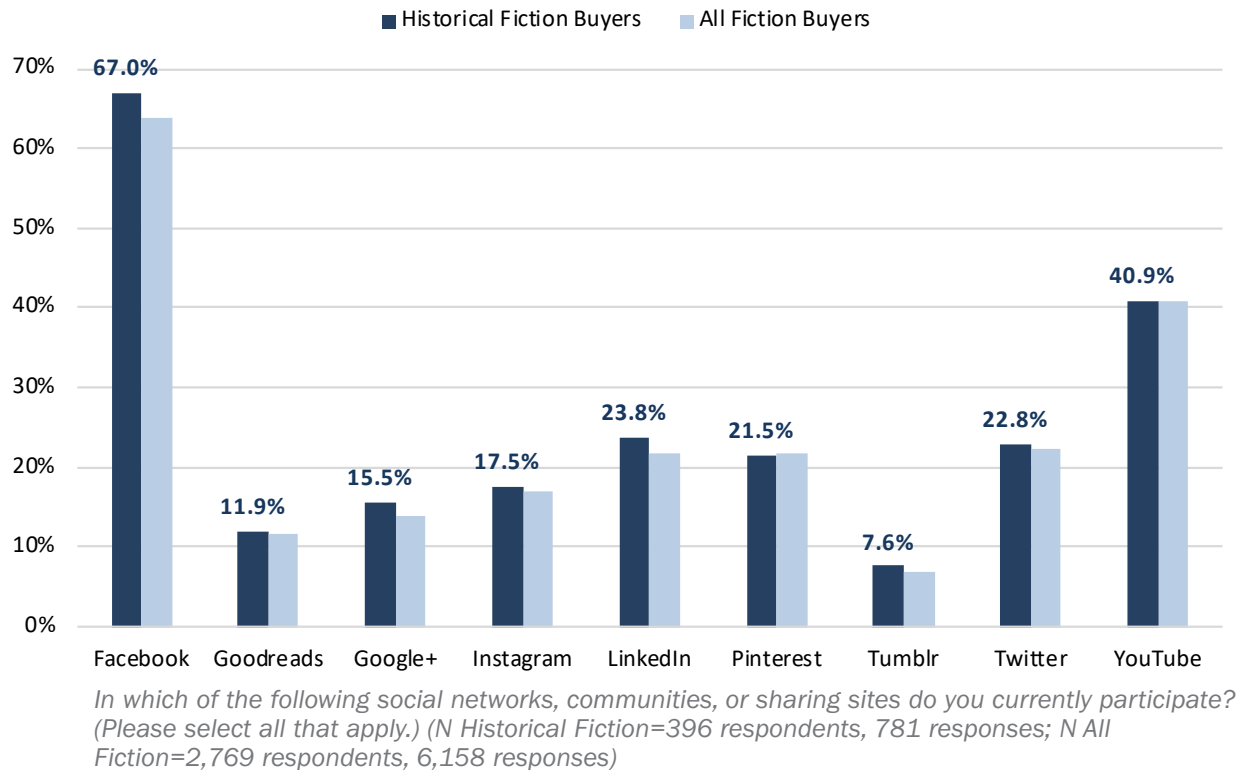
Historical Fiction Purchases by Buyer's Age



How old are you? (N=421)

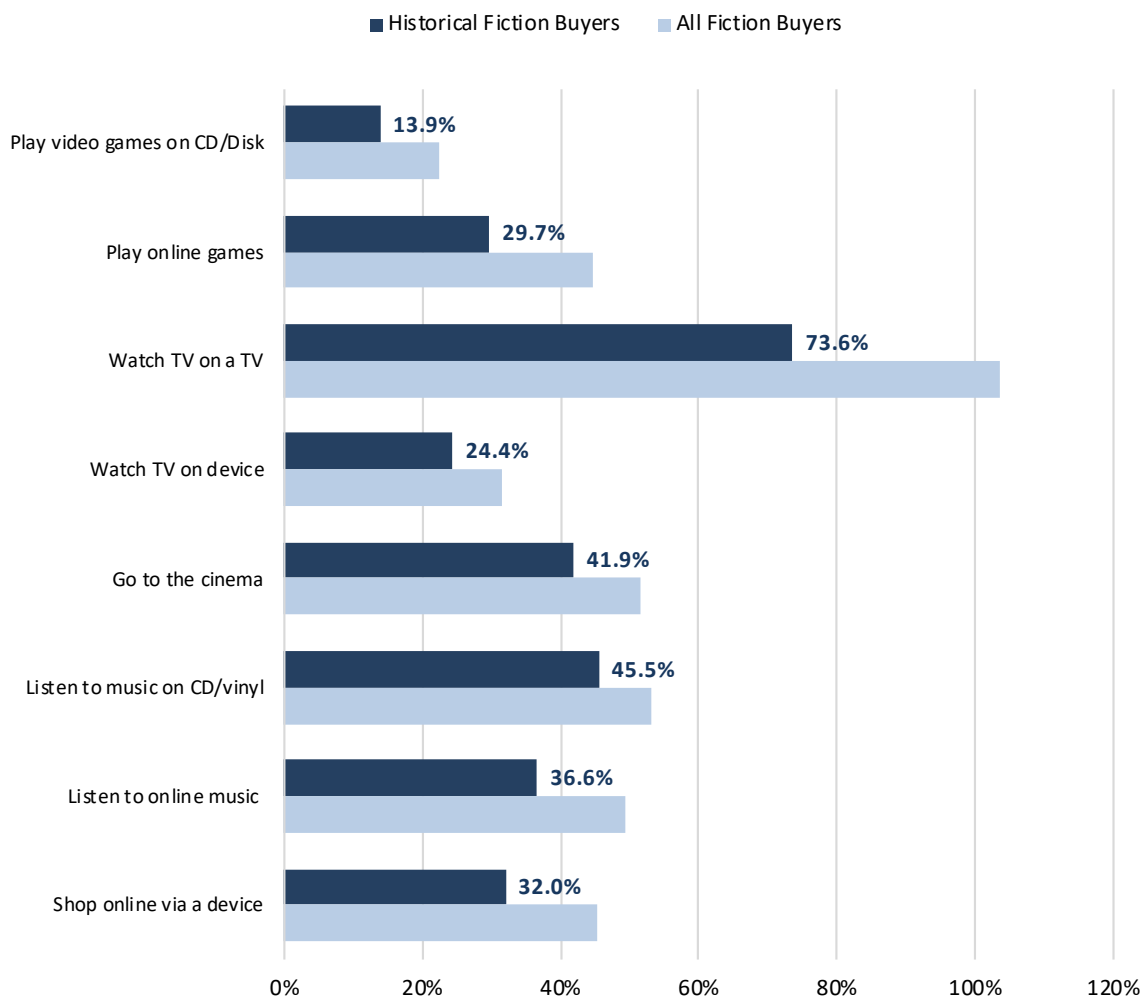
Use of social media is fairly similar if not slightly above that of the average Fiction buyer. In particular, their use of Facebook (67%), LinkedIn (23.8%), and Google+ (15.5%) tends to be a bit higher as well. Overall, the use of social media implies a fairly technologically engaged group of buyers.

Use of Social Networks



Historical Fiction buyers are much less likely to engage in the tech-friendly pastimes that are of interest to the average Fiction buyer, such as playing video/online games or shopping online. They are also less likely to listen to music, whether on CD, vinyl, or online, or to watch television on a TV or on a device.

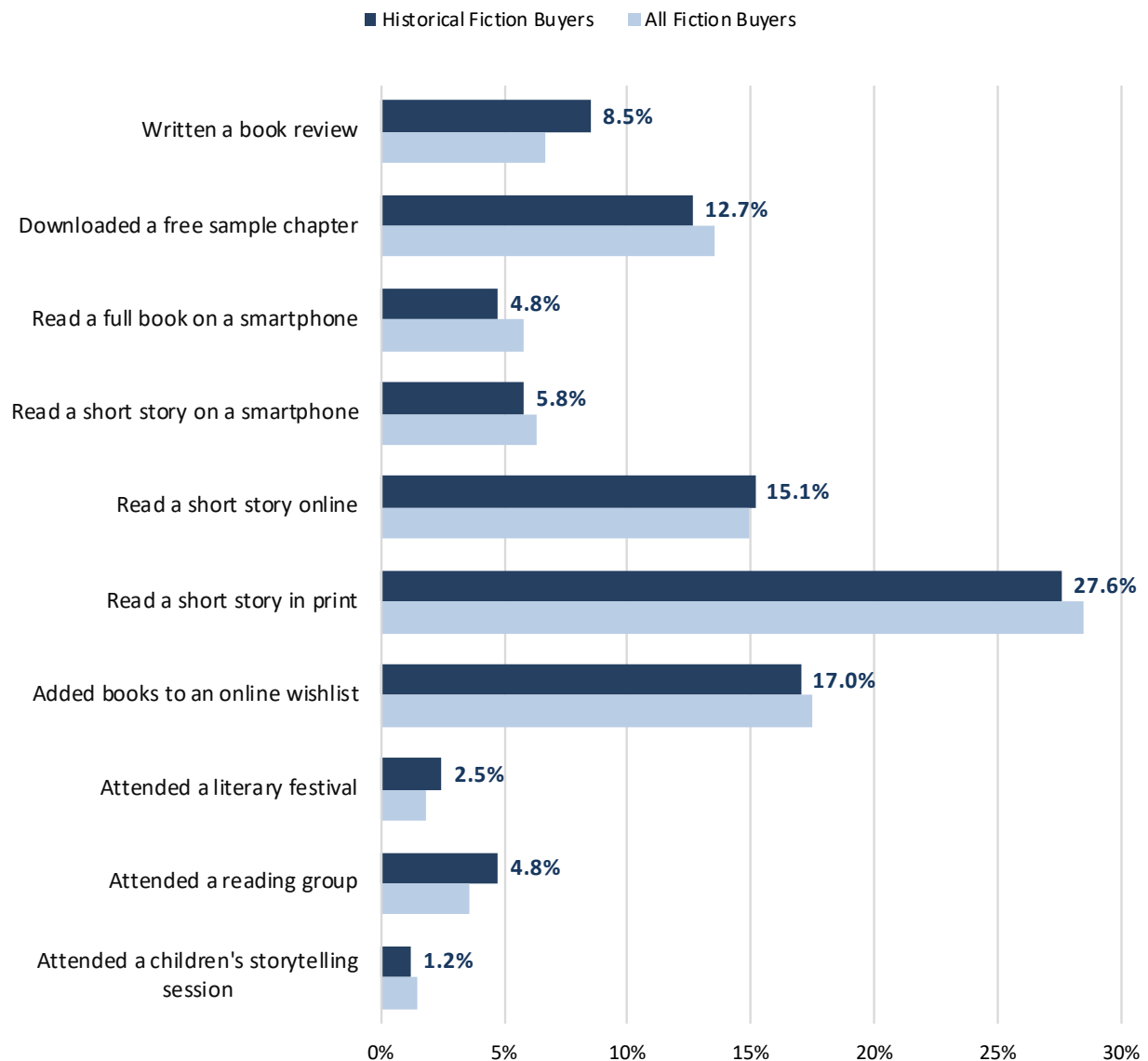
Activities Participated in Monthly



*Which of the following activities do you do at least once in a typical month?
(Please select all that apply.) (N Historical Fiction=902 responses; N All
Fiction=11,111 responses)*

While they may not spend a lot of time partaking in the activities listed above, they are more likely than the average Fiction buyer to attend a reading group (4.8%) or a literary festival (2.5%). Historical Fiction buyers are fairly at par with overall Fiction buyers when it comes to reading on their smartphones (5.6%) and downloading a free sample chapter (12.7%).

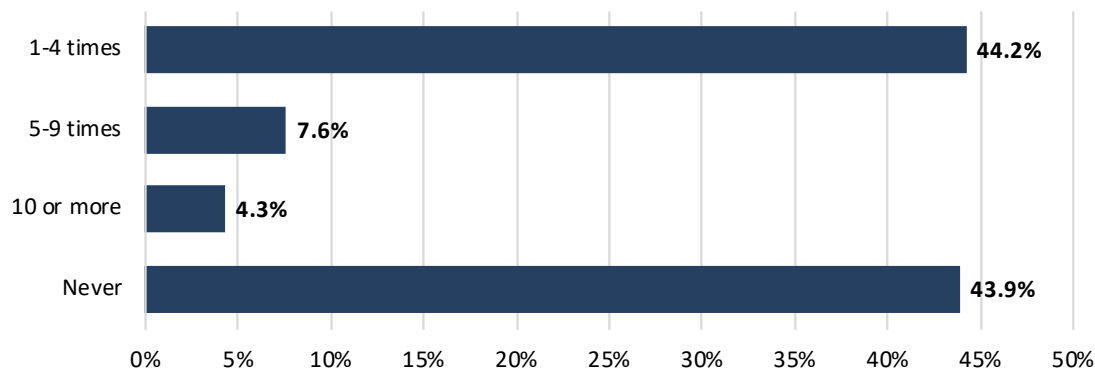
Activities in Last 12 Months



*Which of the following have you done in the last 12 months?
(Please select all that apply.) (N Historical Fiction=482 responses;
N All Fiction=3,639 responses)*

Public library use is high among Historical Fiction book buyers, with 56.1% having used their public library, either in person or online, in the last month. Of those users, most used the library between 1 and 4 times during that time period.

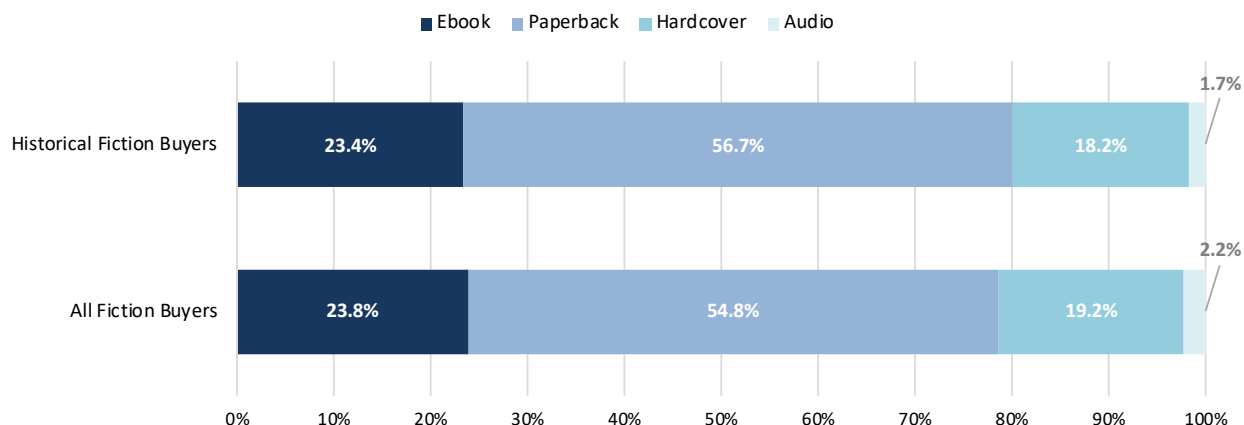
Use of Public Library



*How many times have you visited the public library (online or in person) in the last month?
(N=406)*

When it comes to format preference, we find that Historical Fiction buyers are very similar to the average Fiction buyer, with 23.4% of purchases made in ebook format, 56.7% in paperback, and 18.2% in hardcover. Audiobooks only make up 1.7% of Historical Fiction purchases but, keeping in mind that consumers are being surveyed on their purchases, buyers may not consider a streamed book (e.g., a title obtained from Audible) to be a purchase, per se.

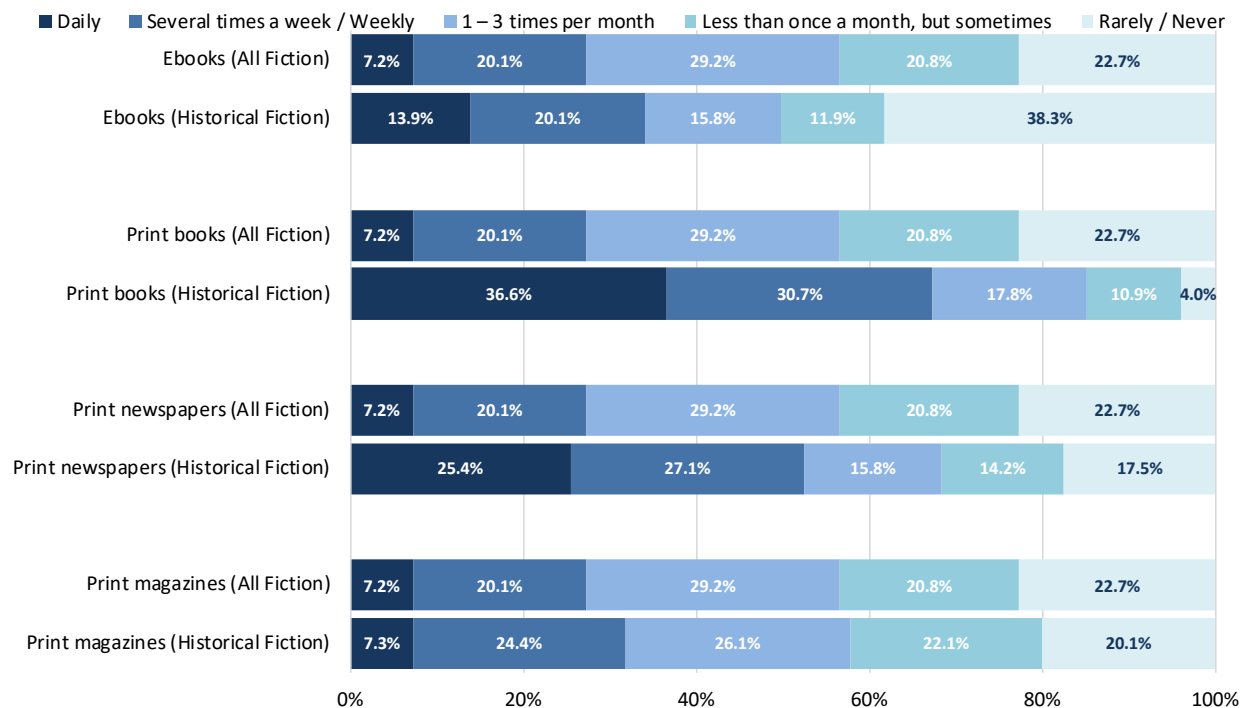
Format Distribution



What format is the book you purchased? (N Historical Fiction=406 purchases; N All Fiction=5,807 purchases)

The graph below looks not at whether Historical Fiction buyers participate in specific activities but rather the frequency at which they participate. For example, of all Historical Fiction buyers who read print books, 36.6% of them read print books daily, which is significantly higher than the average Fiction buyer at 7.2%. Note that reading ebooks and print books here does not necessarily refer to reading Historical Fiction books, but just reading books generally.

Reading Frequency



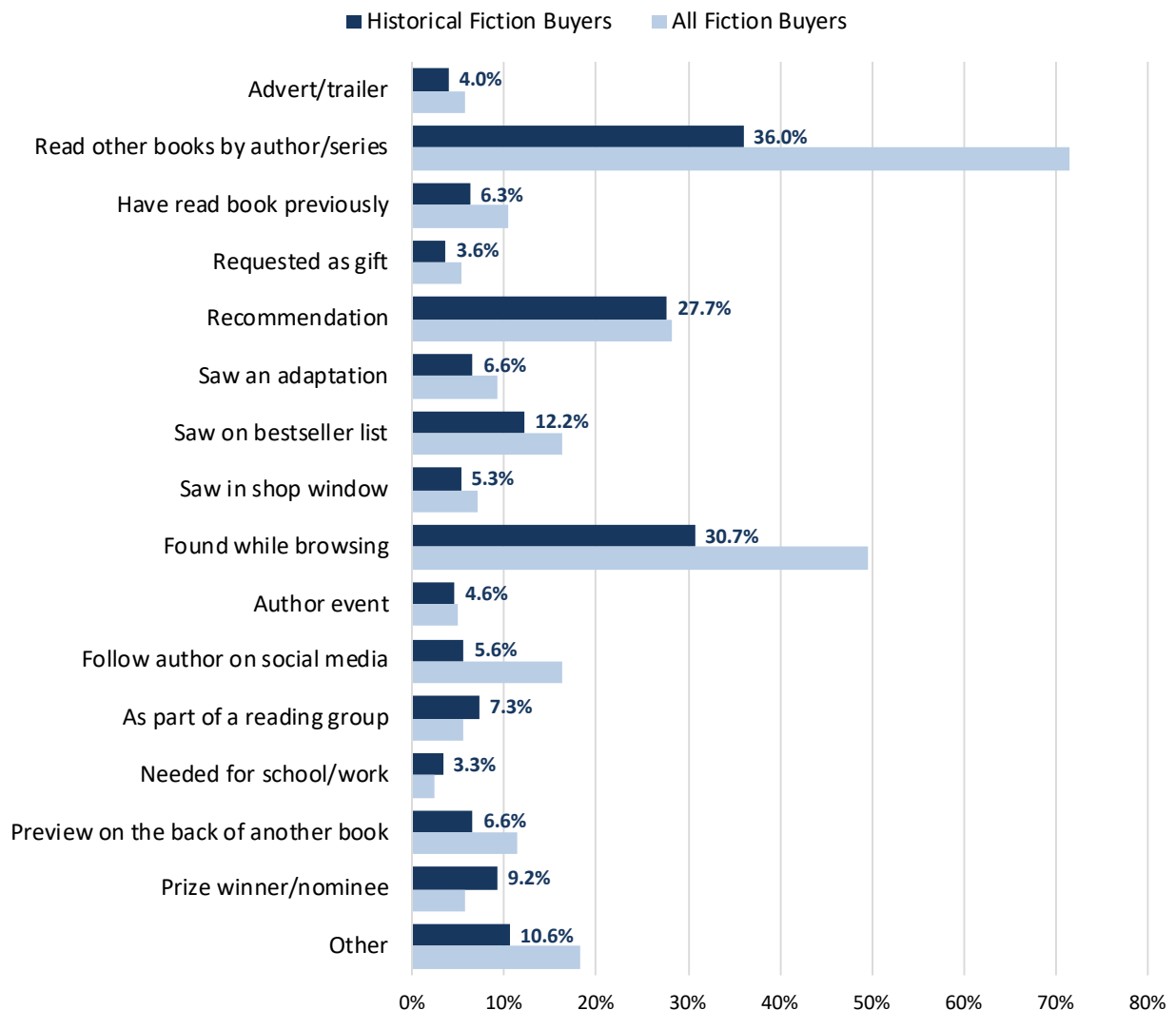
How often do you engage in the following activities? (N Historical Fiction=406 respondents; N All Fiction=3,796 respondents)

How do Historical Fiction buyers find out about books? Discoverability trends for these buyers tend to differ slightly from average Fiction buyers, being slightly more likely to purchase a prize winner/nominee and to find a book through a reading group, and slightly less likely to discover a book by following an author on social media.

The top three ways Historical Fiction buyers discover books are the same as for overall Fiction buyers, which include:

- Reading other books by the same author or within the same series (36%)
- Through a recommendation or a review (27.7%)
- Found while browsing either in person or online (30.7%).

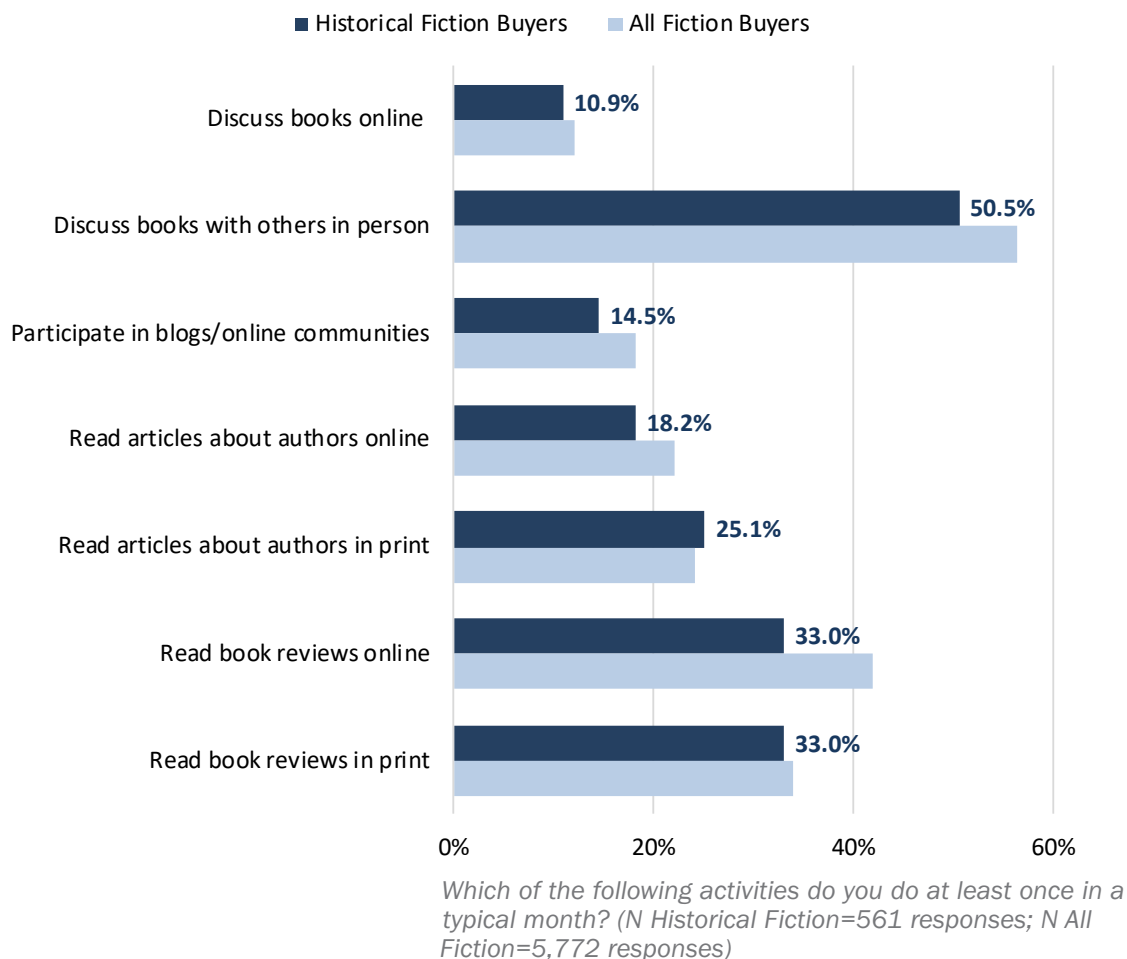
Awareness



*How did you become aware of this book? (Please select all that apply.)
(N Historical Fiction=406 respondents, 544 responses; N All Fiction=3,796 respondents, 7,422 responses)*

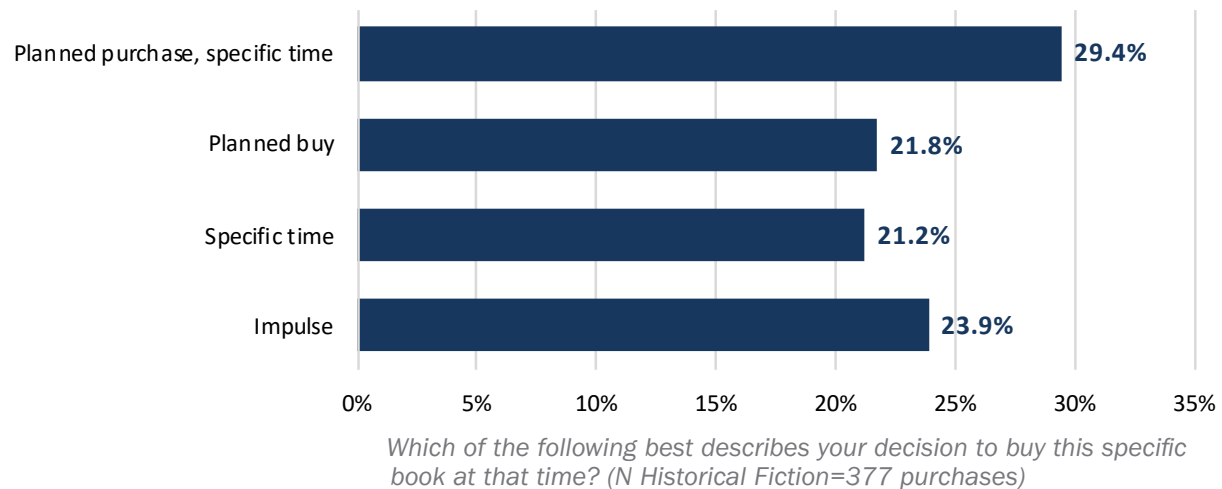
Historical Fiction buyers are slightly less likely than overall Fiction buyers to engage in book-related activities such as discussing books online (10.9%), participating in blogs or online communities (14.5%), or reading book reviews online or in print (33%). Although discussing books with others in person is slightly less than the average Fiction buyer, the majority of responses (50.5%) indicates that Historical Fiction buyers are likely to do so.

Book-Related Activities Participated in During Prior Month



Historical Fiction buyers tend to be planners with almost a third (29.4%) fully planning which book they want to buy and when they buy it. That being said, almost a quarter of buyers also indicated their last purchase was completely impulsive (23.9%), meaning that they did not plan to buy the book they purchased, or any book, prior to the time the purchase was made.

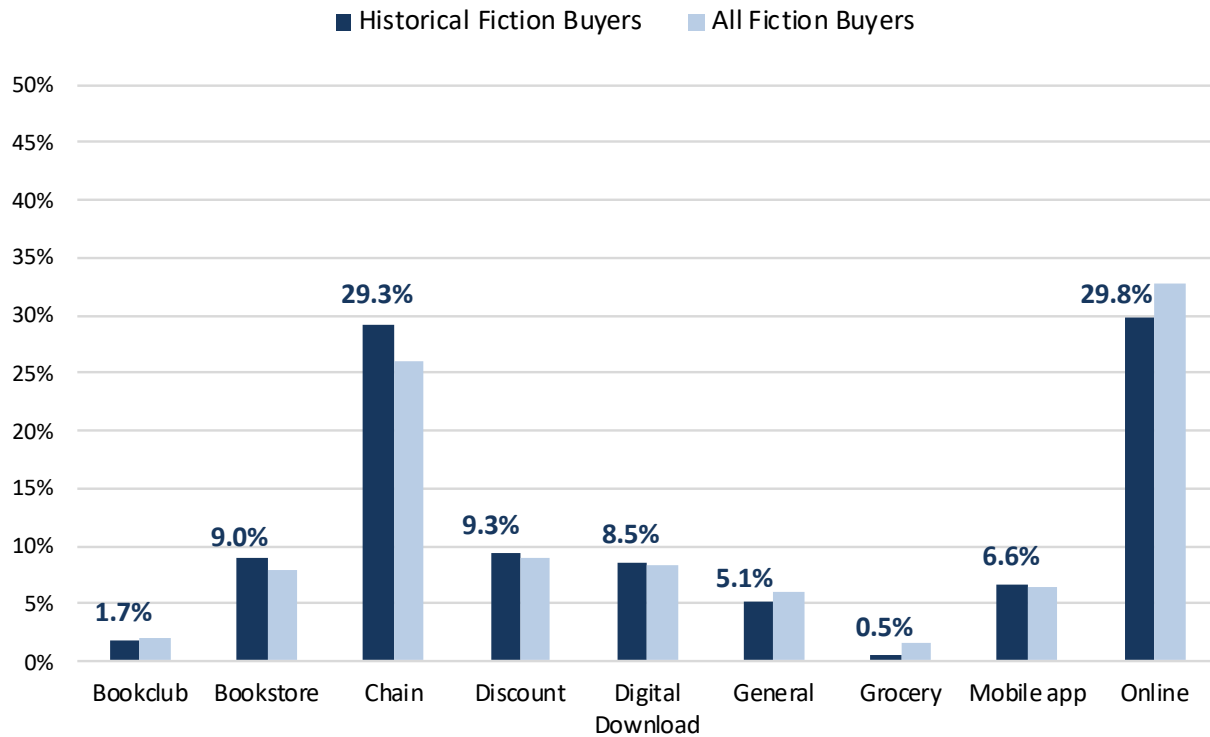
Impulse vs. Planned Purchase



The next graph looks at the channels where Historical Fiction buyers made their most recent purchases. When we combine digital download, online, and mobile app purchases, together they account for 44.9% of all Historical Fiction purchases. We find that both mobile and digital download purchases are on par with the average Fiction buyer, but online purchases come in slightly lower (29.8%).

Both chain bookstores (29.3%) and independent bookstores (9%) represent a slightly higher portion of Historical Fiction purchases.

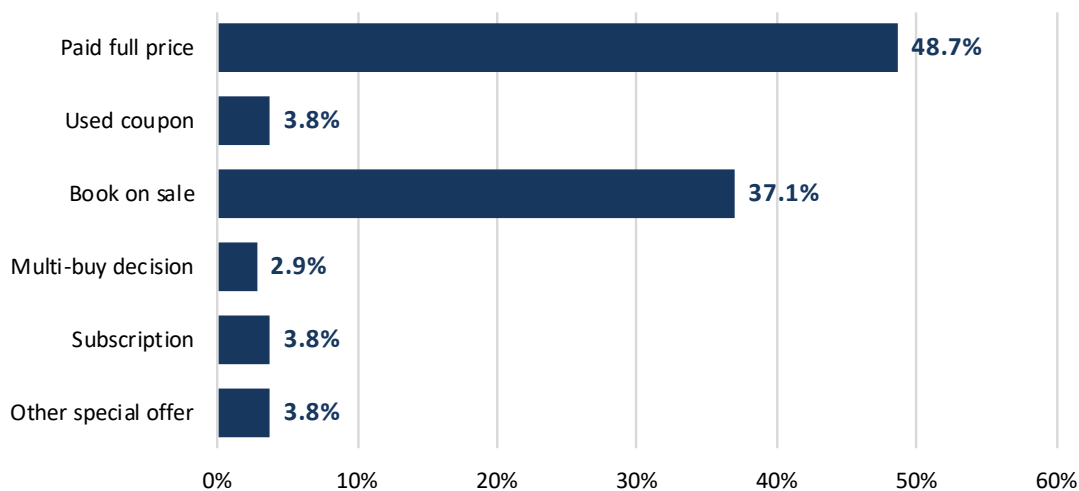
Purchase by Channel



How would you describe where you bought this book? (N Historical Fiction=410 purchases; N All Fiction=5,848 purchases)

When it comes to pricing, approximately half of Historical Fiction book purchases were paid at full price (48.7%) while 37.1% were purchased on sale.

Discounted Pricing



Did you buy the book at full price or did you buy it at a special price or offer? (N Historical Fiction=421 responses)

When asked if they thought the book they purchased was a good value, 65.1% said their purchase was of “excellent” value and 31.7% said it was of “good” value.

Using BiblioShare, BookNet Canada’s bibliographic database, the average list prices for Historical Fiction books published in 2017, broken out by format, are as follows:

List Price

Hardcover	Paperback	Ebook	Audiobook
\$32.84	\$17.94	\$9.93	\$26.01

When we asked Historical Fiction buyers what price they paid for their books, we found that most prices were reduced from the list prices above. 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

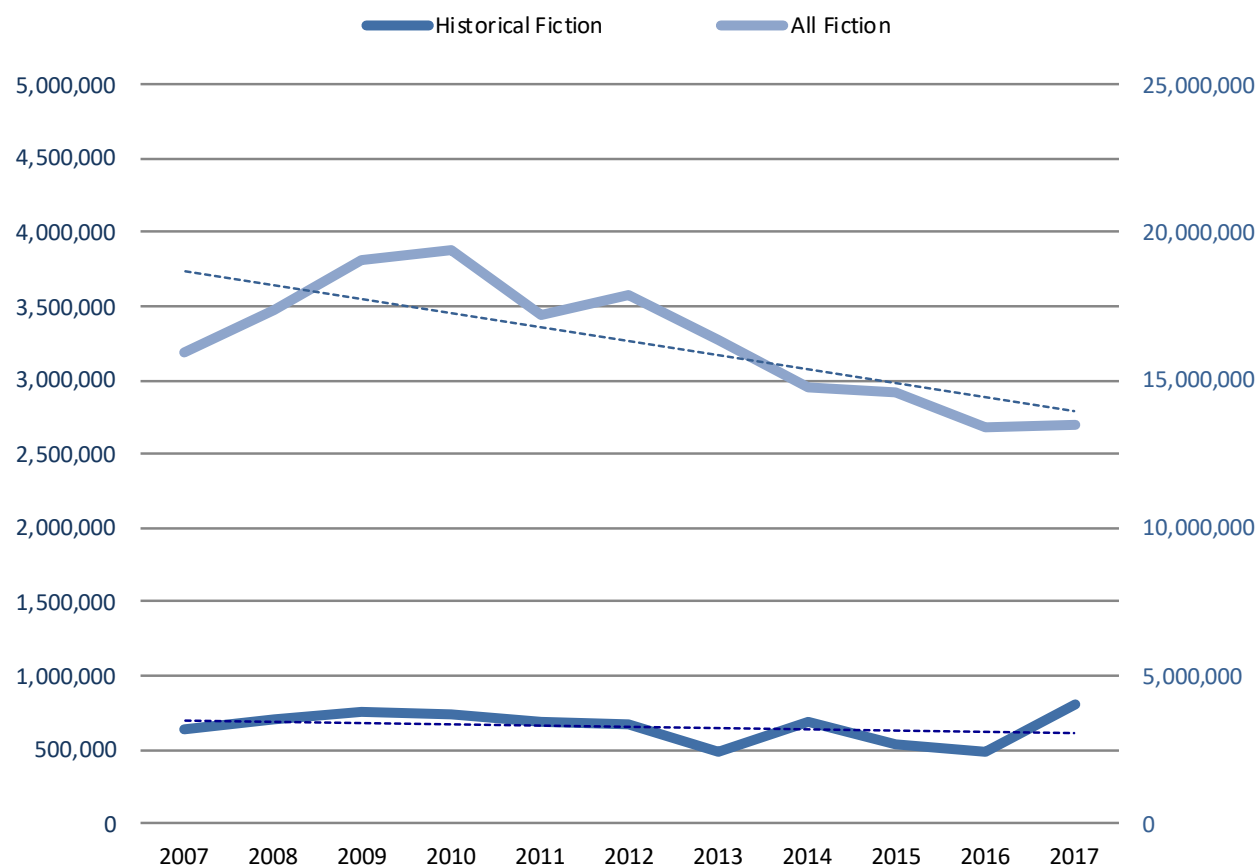
Hardcover	Paperback	Ebook	Audiobook
\$20.46	\$12.83	\$8.04	N/A

How much did you pay for this book (before tax)? (N Historical Fiction=421)

Sales Analysis of the Historical Fiction Category

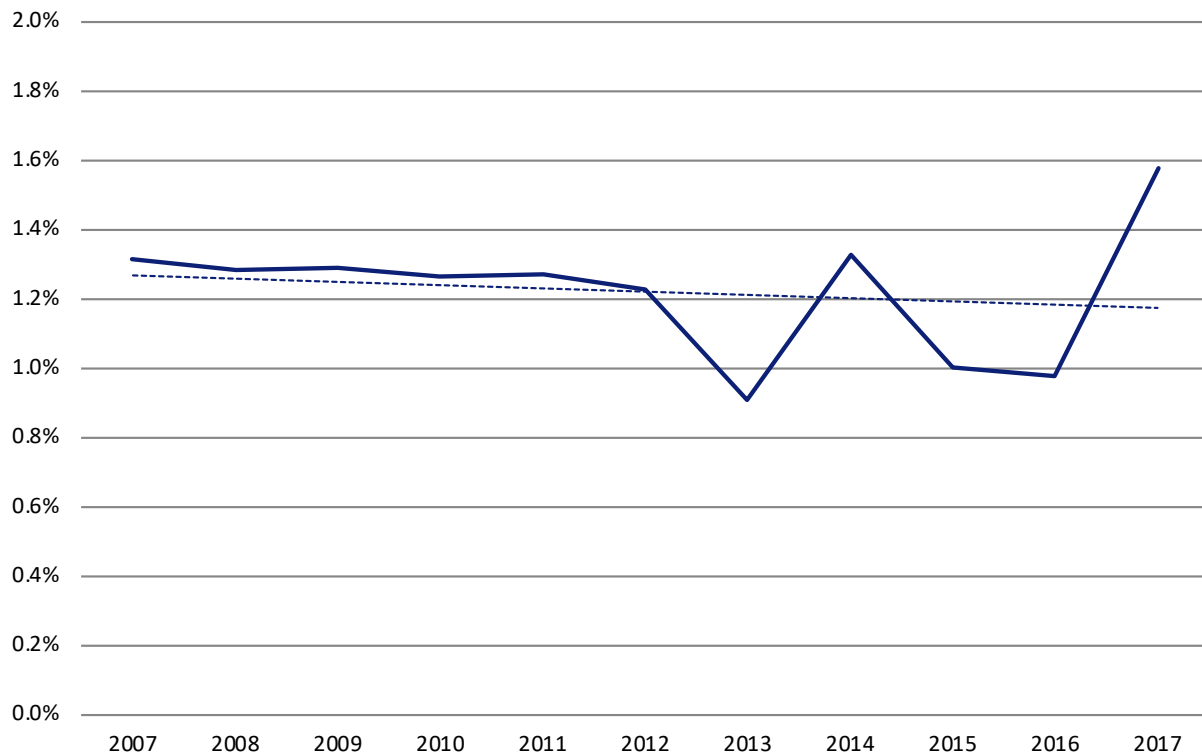
BNC SalesData has tracked the sale of print books in the Canadian trade market for more than 10 years. Looking at the sale of Historical Fiction books across this 10-year period, we see a slight but notable annual decline in the volume of print Historical Fiction books sold. That being said, 2017 saw an upturn that can be partially attributed to sales of Kate Quinn's *The Alice Network* and Ken Follett's *A Column of Fire*.

Volume Sold



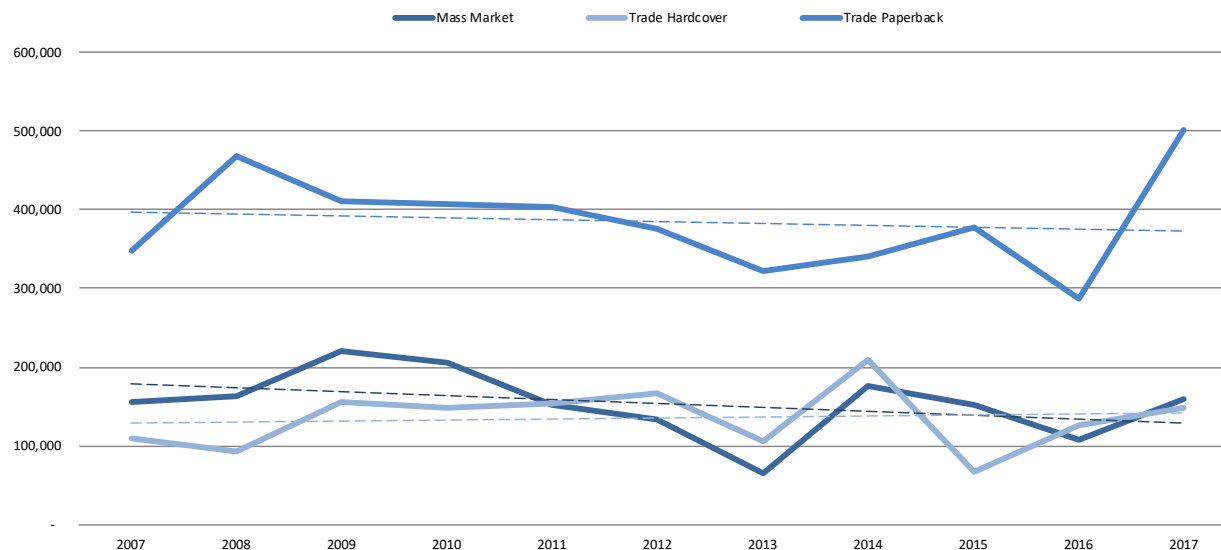
Market share looks at what percentage of the market is “owned” by a particular category. Again, looking at the print market only, we find that market share for Historical Fiction has increased notably over the past two years.

Market Share



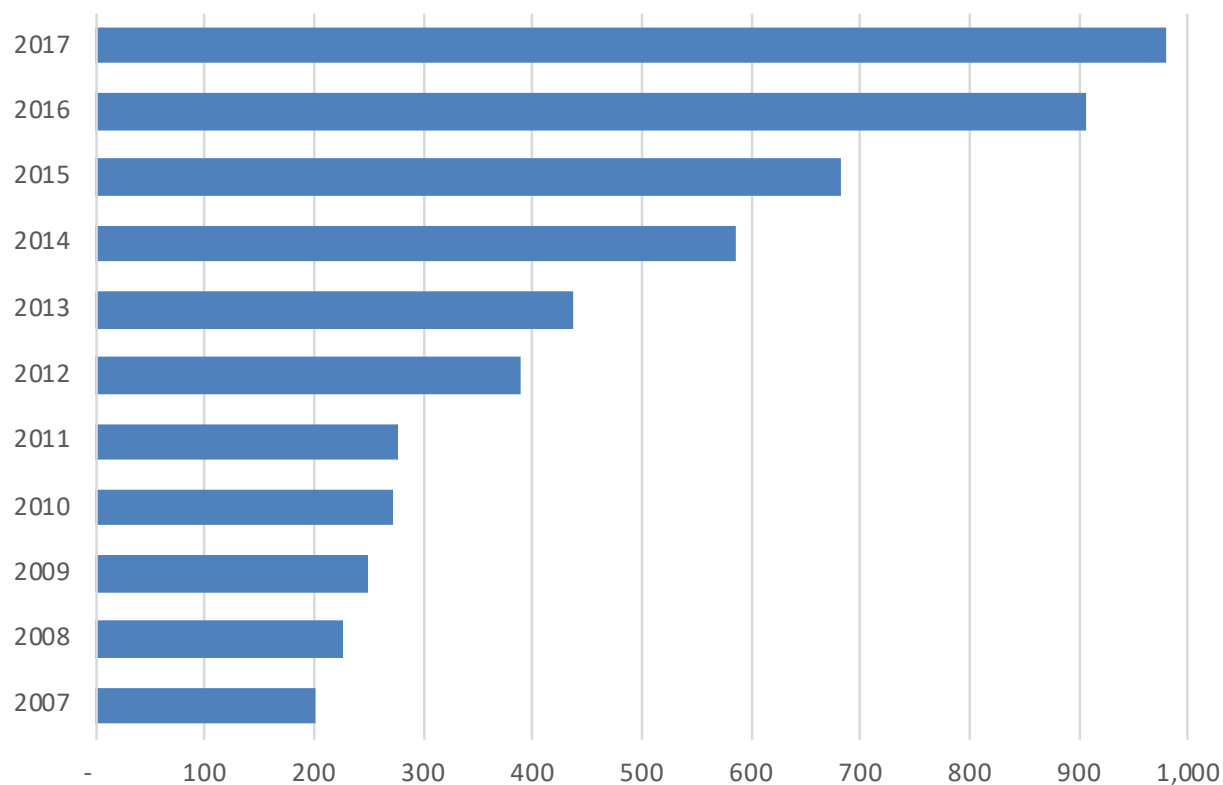
When looking at sales by format, trade paperback sales top the list. Perhaps more interestingly, mass market and hardcover sales are relatively similar but with a gradual decline in mass market sales over the past several years. Potentially due to big titles such as Kate Quinn's *The Alice Network* and/or Ken Follett's *A Column of Fire* (both in paperback editions), we are finding that trade paperback sales are notably up in 2017.

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. Historical Fiction is a fairly frontlist heavy category as the majority of titles selling have a publication date of 2016 or 2017.

Number of Titles Selling in 2017 by Publication Year



While some of the bestselling Historical Fiction authors are mainstays who have topped the list for consecutive years — namely Diana Gabaldon at the top, as well as Philippa Gregory, Danielle Steel, and Ken Follett — a number of new authors are making an appearance, such as Kate Quinn and Pam Jenoff.

The top 10 bestselling Historical Fiction authors in Canada for 2017 are:

1. Diana Gabaldon
2. Kate Quinn
3. Ken Follett
4. Danielle Steel
5. Pam Jenoff
6. Jennifer Robson
7. Gill Paul
8. Bernard Cornwell
9. Philippa Gregory
10. Ami McKay

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 2015 to 2017. If you are building a Historical Fiction section in a bookstore, these are the tried and true titles from the last three years. To be included on this list, a Historical Fiction title had to rank within the top 300 for each of the three 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
Winter of the World	Follett, Ken	9780451419248	Penguin Publishing Group	TP	\$26.50	2013-08-27
Fall of Giants	Follett, Ken	9780451232854	Penguin Publishing Group	MM	\$11.99	2012-09-04
The Kitchen House	Grissom, Kathleen	9781439153666	Touchstone	TP	\$22.99	2010-02-02
The Dovekeepers	Hoffman, Alice	9781451617481	Scribner	TP	\$25.00	2012-04-03
The Pillars of the Earth	Follett, Ken	9780451166890	Penguin Publishing Group	MM	\$13.99	1990-07-09
The Iron King	Druon, Maurice	9780007491261	HarperCollins Publishers	TP	\$15.99	2013-04-11
The Guernsey Literary and Potato Peel Pie Society	Shaffer, Mary Ann; Barrows, Annie	9780385341004	Random House Publishing Group	TP	\$23.00	2009-05-05
World Without End	Follett, Ken	9780451228376	Penguin Publishing Group	MM	\$13.99	2010-07-27
Fall of Giants	Follett, Ken	9780451232571	Penguin Publishing Group	TP	\$29.00	2011-08-30
The Land of Painted Caves	Auel, Jean M.	9780553289435	Random House Publishing Group	MM	\$10.99	2011-11-22
The Lady of the Rivers	Gregory, Philippa	9781416563716	Touchstone	TP	\$19.99	2012-04-03
The Witch's Daughter	Brackston, Paula	9781250004086	St. Martin's Press	TP	\$23.99	2012-01-31
World Without End	Follett, Ken	9780451418449	Penguin Publishing Group	MM	\$14.99	2012-10-02
London	Rutherfurd, Edward	9780449002636	Random House Publishing Group	MM	\$10.99	1998-03-28
The Man from St. Petersburg	Follett, Ken	9780451163516	Penguin Publishing Group	MM	\$13.50	1983-05-01
Jackdaws	Follett, Ken	9780451207524	Penguin Publishing Group	MM	\$13.50	2002-11-26
The Other Boleyn Girl	Gregory, Philippa	9780743227445	Touchstone	TP	\$19.99	2002-06-04
The Shelters of Stone	Auel, Jean M.	9780553289428	Random House Publishing Group	MM	\$9.99	2003-07-01
The Key to Rebecca	Follett, Ken	9780451163493	Penguin Publishing Group	MM	\$13.50	1981-09-01
The Valley of Horses	Auel, Jean M.	9780553250534	Random House Publishing Group	MM	\$9.99	1984-11-01
The Rose Garden	Kearsley, Susanna	9780749010478	Allison & Busby, Limited	TP	\$17.99	2012-09-27
The Virgin's Lover	Gregory, Philippa	9780743269261	Touchstone	TP	\$19.99	2005-09-07
The Mammoth Hunters	Auel, Jean M.	9780553280944	Random House Publishing Group	MM	\$9.99	1986-11-01
The Plains of Passage	Auel, Jean M.	9780553289411	Random House Publishing Group	MM	\$9.99	1991-10-01
The Trial	Patterson, James; DiLallo, Richard	9780446557788	Grand Central Publishing	MM	\$13.00	2010-12-01
Wideacre	Gregory, Philippa	9780743249294	Touchstone	TP	\$22.99	2003-07-02
The Queen's Fool	Gregory, Philippa	9780743246071	Touchstone	TP	\$19.99	2004-02-04
The Historian	Kostova, Elizabeth	9780316070638	Little Brown & Company	TP	\$21.00	2009-09-01
The Wise Woman	Gregory, Philippa	9781416590880	Touchstone	TP	\$19.99	2008-05-27
Lie down with Lions	Follett, Ken	9780451163509	Penguin Publishing Group	MM	\$13.50	1986-12-01