



BNC RESEARCH

Deep Dive:

The Romance Book Buyer

2016



**BOOKNET
CANADA**

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The Romance 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 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 267 Romance book buyers representing 556 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 Romance Buyer

From Vikings to LGBT to Time Travel (to name but a few), Romance covers a great many subgenres. Romance readers are often referred to as “voraciously” consuming content, as illustrated by the fact that in 2015 Scribd had to reduce the volume of their Romance holdings in order to continue their subscription service. The conjecture is that “because Scribd has to pay the authors of the books they make available on their site, it is now shelling out more money than it can make back in subscriptions, thanks to the voracious appetites of romance and erotica readers.”¹

In 2016, there were more than 15,600 ISBNs reported in the Romance category, almost 13,000 of them with sales. The Romance category accounted for just over 4% of all print book sales in 2016, and just over 15% of all print Fiction sales.

So, who buys Romance books? The average Romance book buyer is:

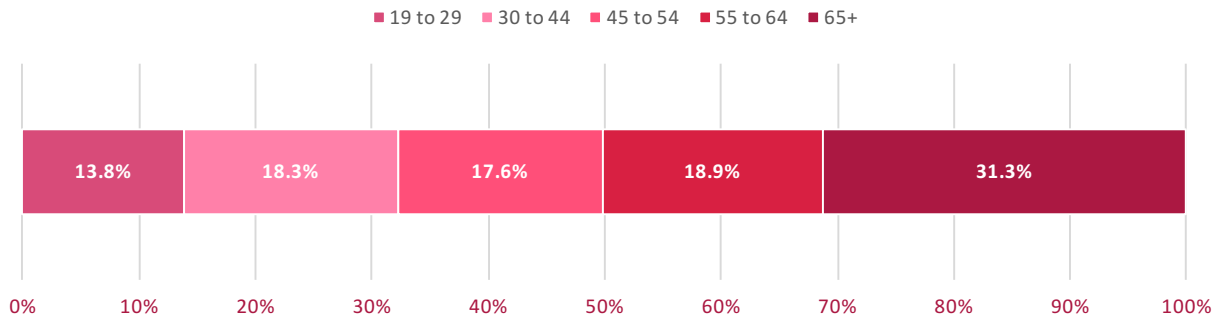
- female (81%);
- 52 years old;
- married;
- university-educated; and,
- resides all over Canada — though she’s most likely to reside in the Prairies (14%) and least likely to reside in Western Canada (10%).

It is often assumed that all Romance readers are female, but we find that 19% of the purchases reported for this study were made by male buyers. This is similar to the breakdown in the US, where a 2016 study estimated that 16% of Romance readers are male². The graph below takes into account all 556 tracked purchases, so the age brackets that purchase in higher volume are more heavily represented.

¹ Barnett, David. “Scribd Cuts Romance and Erotica Titles”. The Guardian. N.p., 2017. Web. 30 May 2017. <https://www.theguardian.com/books/2015/jul/01/scribd-cuts-romance-and-erotica-titles>

² “Romance Readers by The Numbers”. Nielsen.com. N.p., 2017. Web. 30 May 2017. <http://www.nielsen.com/us/en/insights/news/2016/romance-readers-by-the-numbers.html>

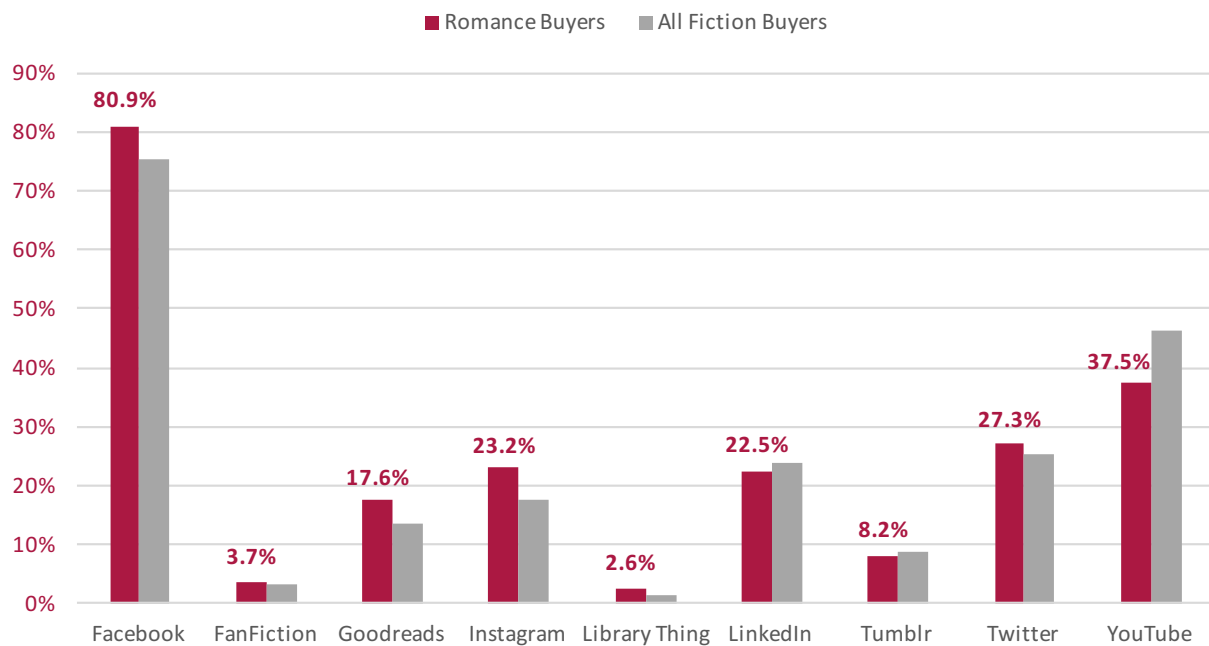
Romance Buyers by Age



How old are you? (N Romance=556 responses)

Romance buyers tend to be engaged social media users, with higher than average use of Facebook, Instagram, Goodreads, and Twitter. There tends to be slightly less use of LinkedIn, Tumblr, and YouTube.

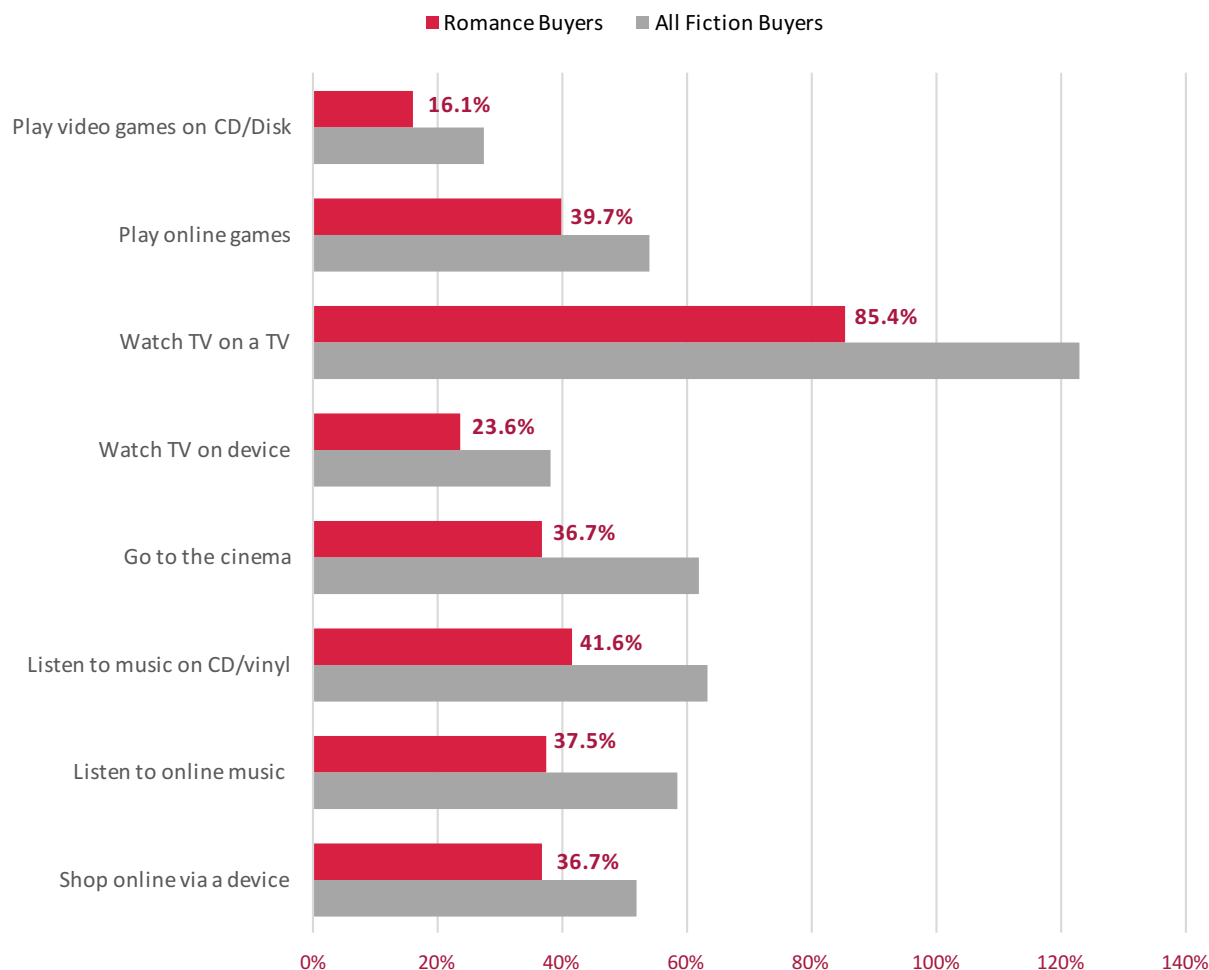
Use of Social Networks



In which of the following social networks, communities, or sharing sites do you currently participate? (Please select all that apply.) (N Romance= 267 respondents, 597 responses; N All Fiction= 1,580 respondents, 3,397 responses)

It may be that Romance buyers, as a dedicated group of voracious readers, spend all of their leisure time reading but in any case they are less likely to be involved with activities such as playing video games, watching TV, going to the movies, shopping online, or listening to music.

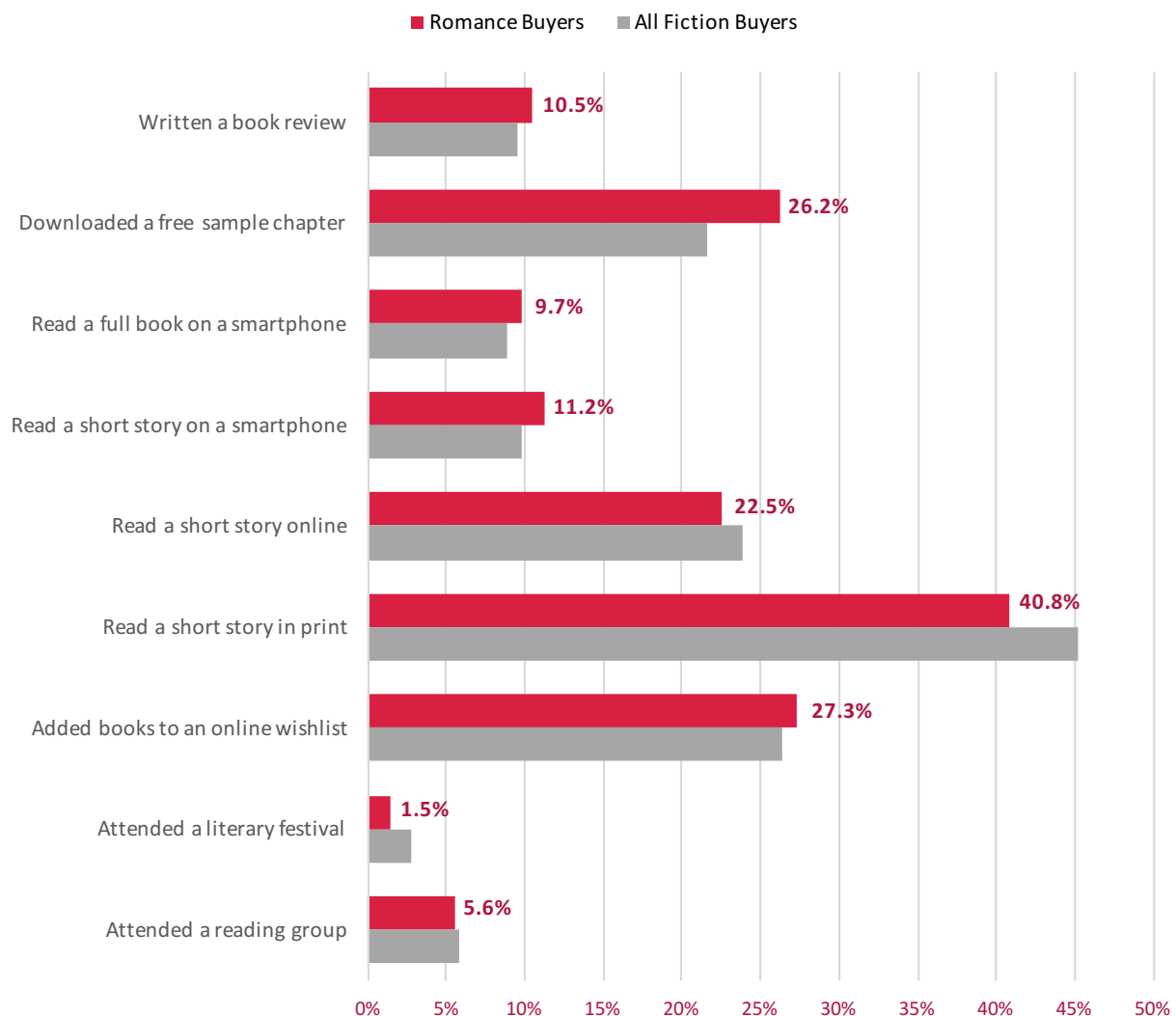
Activities Participated in Monthly



Which of the following activities do you do at least once in a typical month? (Please select all that apply.) (N Romance=267 respondents, 847 responses; N All Fiction=1,580 respondents, 7,557 responses)

Their dedication to books comes through when we see that Romance buyers are more inclined than the average Fiction buyer to write book reviews, read on their phones, and add books to online wishlists. Particularly of note, 26.2% of Romance buyers said they downloaded a sample chapter, which is considerably more than the average Fiction reader.

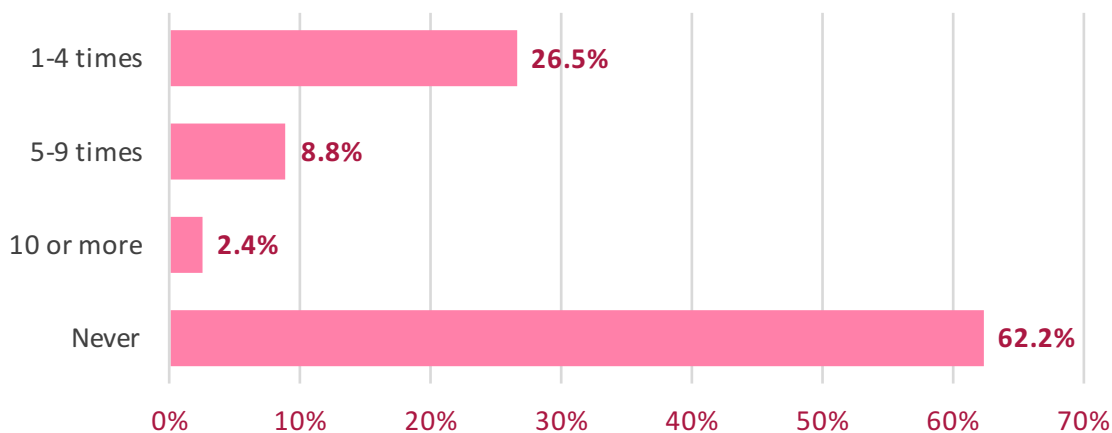
Activities in Last 12 Months



Which of the following have you done in the last 12 months? (Please select all that apply.) (N Romance=267 respondents, 526 responses; N All Fiction=1,580 respondents, 3,125 responses)

Given the amount that Romance buyers are known to read, it is perhaps surprising that only 37.8% of them use the public library, either online or in person, in a given month. This is one of the lower usages among all the Fiction categories that were reviewed for the Deep Dive series. This may be due to high demand for the category, which in turn contributes to longer wait times for borrowing new Romance books from the public library.

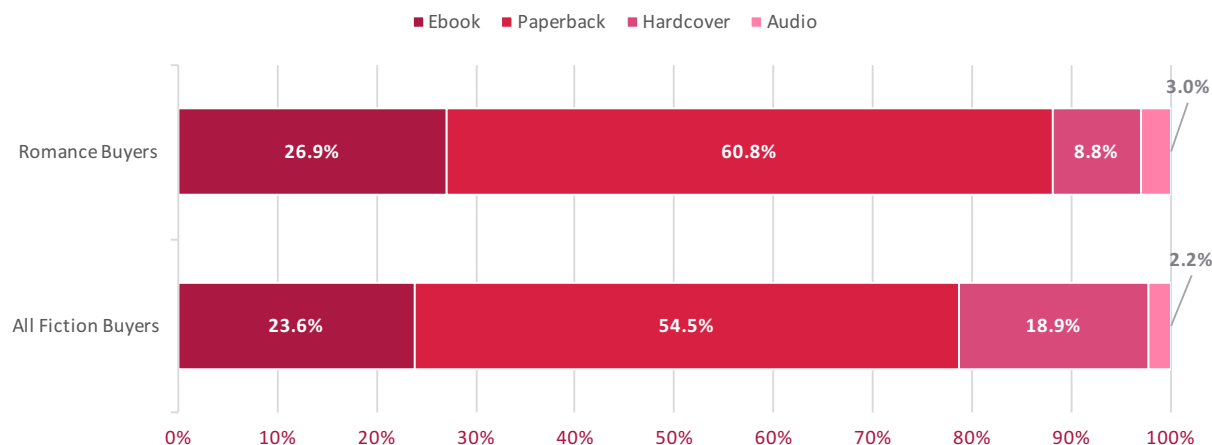
Use of Public Library



How many times have you visited the public library (online or in person) in the last month? (N Romance = 498 responses)

There is higher demand among Romance buyers for digital content; ebooks account for almost 27% of purchases, which is notably higher than for the average Fiction buyer. Similarly, hardcover purchases are lower, while paperback is the preferred format at 61%.

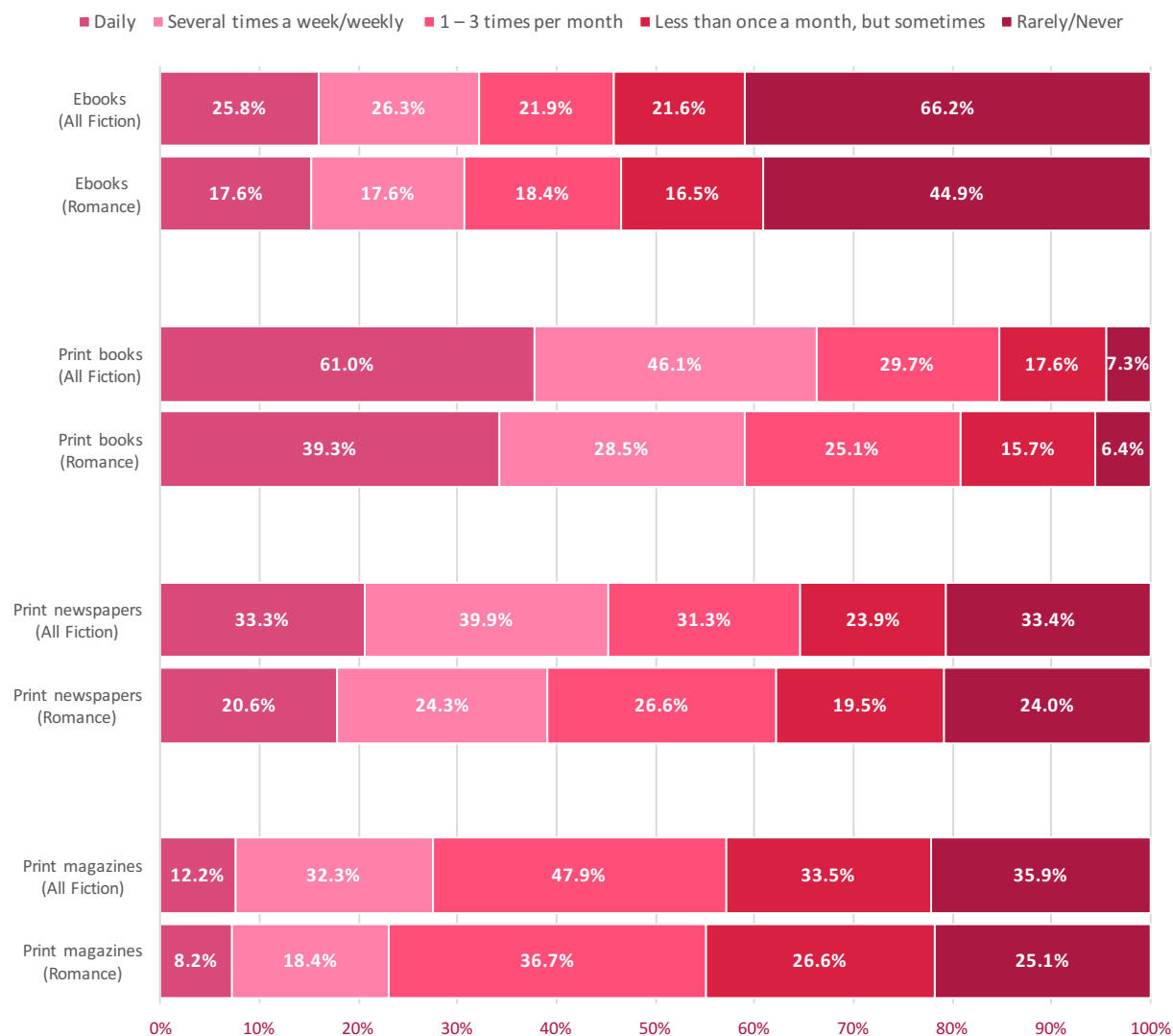
Format Distribution



What format is the book you purchased? (N Romance=498 responses, N All Fiction=3,519 responses)

The graph below looks not at whether Romance buyers participate in specific activities but rather the frequency at which they participate. For example, of all Fiction book buyers, 26% read ebooks daily, compared to 18% of Romance buyers. Note that reading ebooks and print books here does not necessarily refer to reading Romance books, but just books generally.

Reading Frequency



How often do you engage in the following activities? (N All Fiction=1,580 respondents, N Romance=267 respondents)

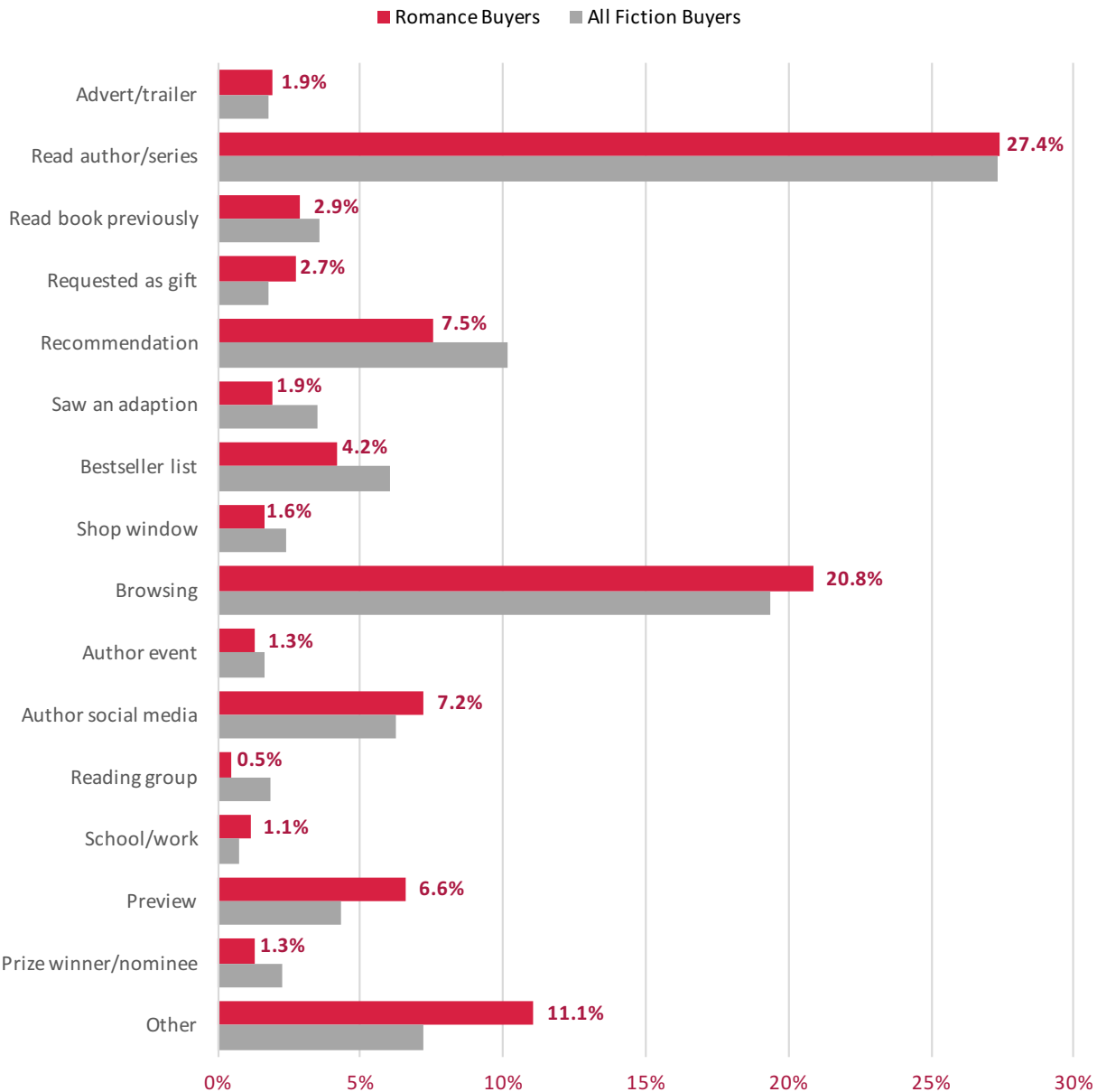
Discoverability and Decision to Buy

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 Romance buyers become aware of titles, where they make their purchases, and whether their purchases are planned or impulsive.

Romance buyers are much more likely than the average Fiction buyer to find their most recent purchase while browsing (20.8%) or through an author's social media (7.2%). Given that 6.6% of Romance buyers become aware of their purchases through previews, that would be one area of metadata to put some effort behind.

Interestingly, Romance buyers are less inclined to find out about books through personal channels such as recommendations (although this is still at 7.5%) and reading groups (0.5%), compared to the average Fiction buyer. They are also less motivated by bestseller lists.

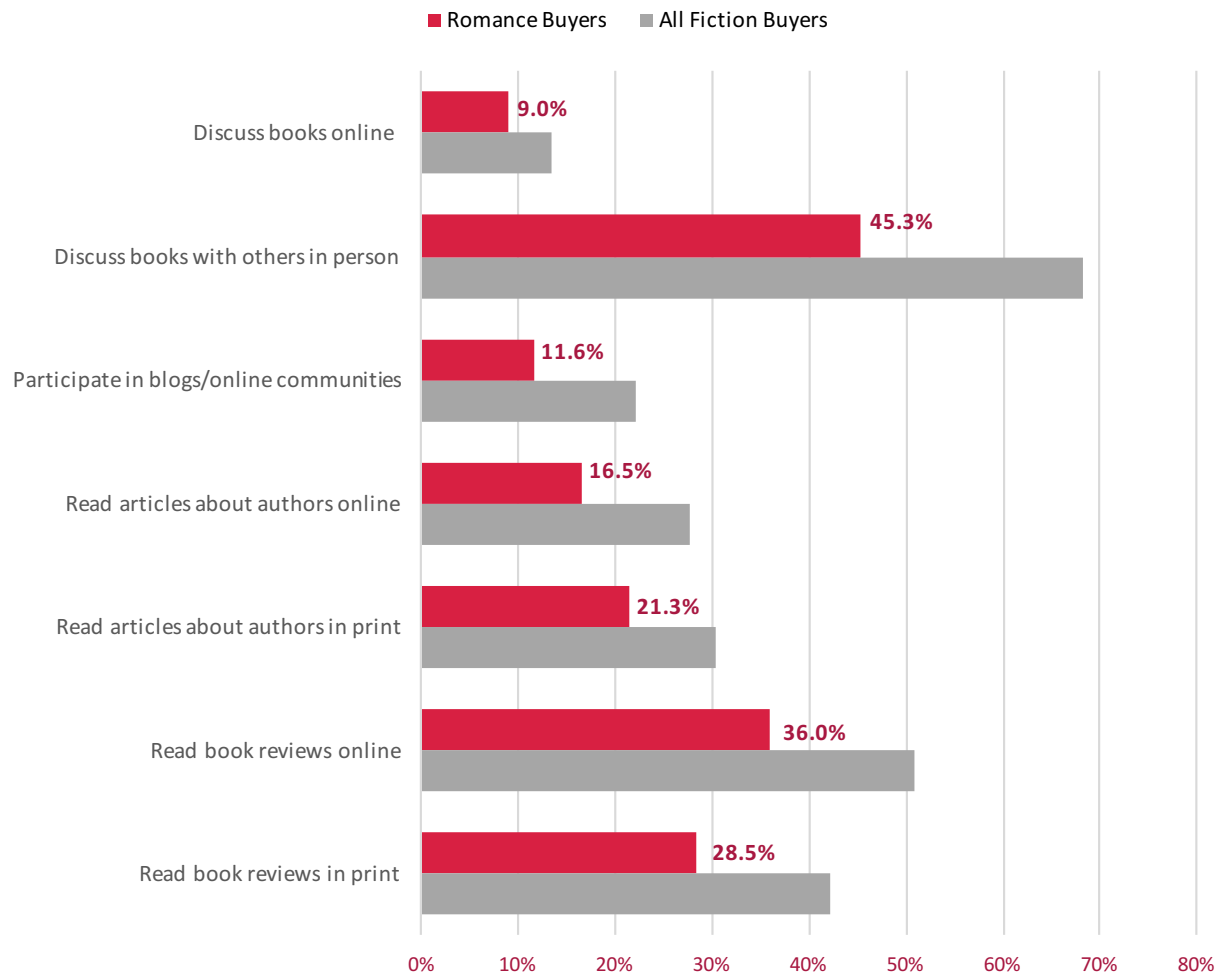
Awareness



How did you become aware of this book? (Please select all that apply.) (N Romance=267 respondents, 624 responses; N All Fiction=1,580 respondents, 4,452 responses)

It may be that Romance buyers spend more time actually reading than do other Fiction buyers, because they are less frequent participants of all of the following book-related activities, including discussing books in person or online, participating in blogs or online communities, and reading articles about authors. That being said, in a typical month, just over 45% of Romance buyers discuss books with others in person and 36% read book reviews online.

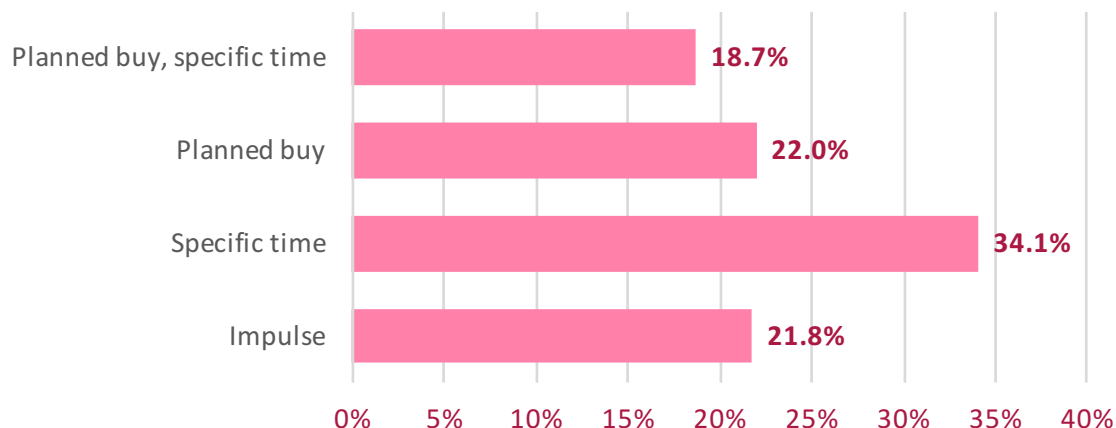
Book-Related Activities Participated in During Prior Month



Which of the following activities do you do at least once in a typical month? (Please select all that apply.) (N Romance=267 respondents, 449 responses; N All Fiction=1,580 respondents, 4,026 responses)

Of all the other Fiction categories reviewed for the Deep Dive series, Romance buyers are most likely to be somewhat impulsive buyers, with 34% planning to buy a book at a specific time but not planning to purchase a specific title.

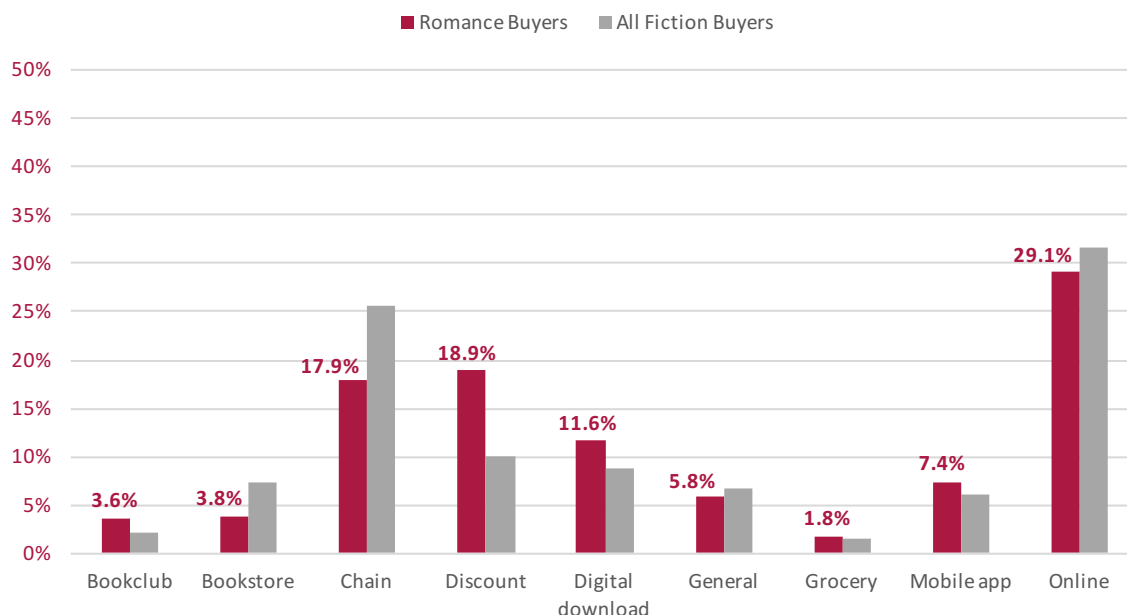
Impulse vs. Planned Purchase



Which of the following best describes your decision to buy this specific book at that time? (N Romance=455 responses)

When we combine purchases made online, through mobile apps, and by digital download, these comprise 48.1% of all Romance book purchases. When it comes to physical channels, Romance buyers are significantly more likely than the average Fiction buyer to make their purchase at a discount outlet such as Costco or Wal-Mart and less likely to purchase in a chain bookstore.

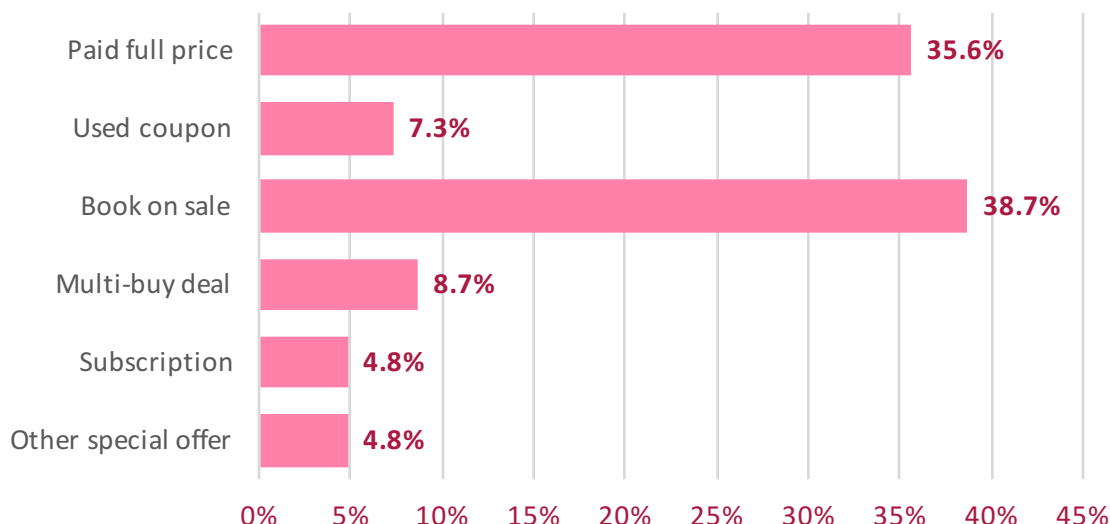
Purchase by Channel



How would you describe where you bought this book? (N Romance=498 responses, N All Fiction=4,356 responses)

Of all the Fiction buyers examined for the Deep Dive series, Romance buyers are least likely to pay full price for a book (35.6%). Conversely, they are most likely to buy a book through a multi-buy deal (8.7%).

Discounted Pricing



Did you buy the book at full price or did you buy it at a special price or offer? (N Romance=519 responses)

When asked if they thought the book they purchased was a good value, 60% of Romance book buyers said their purchases were of excellent value. This is slightly higher than the average Fiction buyer, which reports 57% of purchases as excellent value. An impressive 96% of Romance buyers thought the price they paid was either good or excellent.

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

List Price

Hardcover	Paperback	Ebook	Audiobook
\$31.98	\$11.60	\$6.41	\$21.22

When we asked respondents what price they paid for their Romance books, we found that prices were notably 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

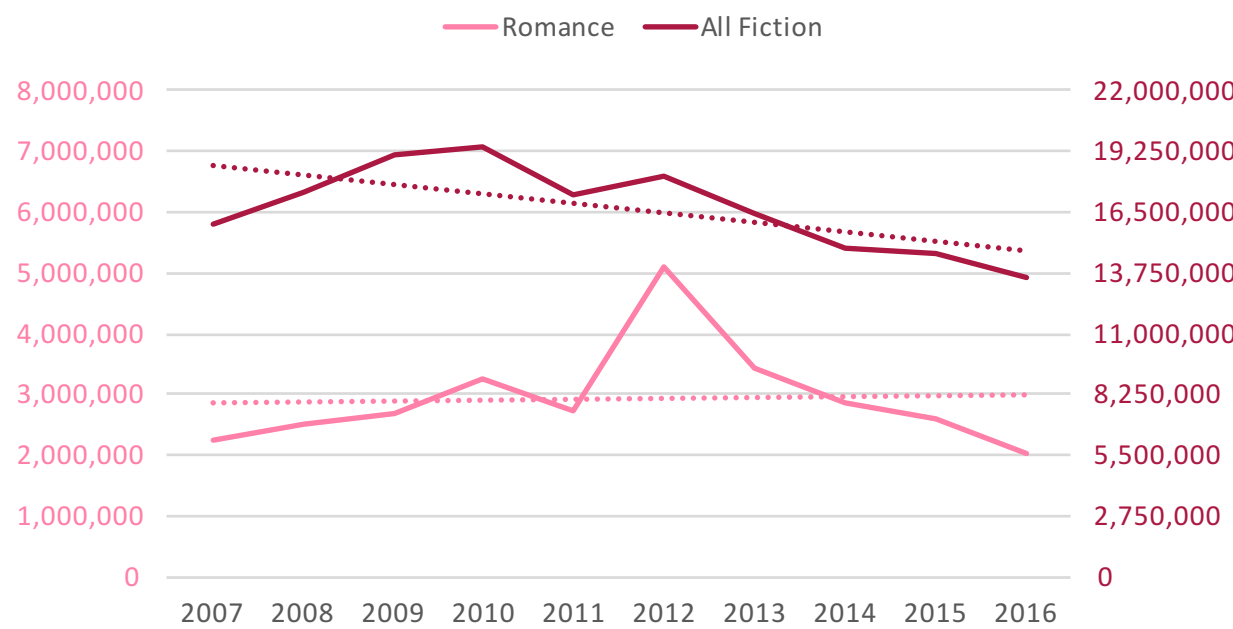
Hardcover	Paperback	Ebook	Audiobook
\$19.35	\$9.48	\$6.23	\$7.67

How much did you pay for this book (before tax?) (N Romance=497 responses)

Sales Analysis of the Romance Category

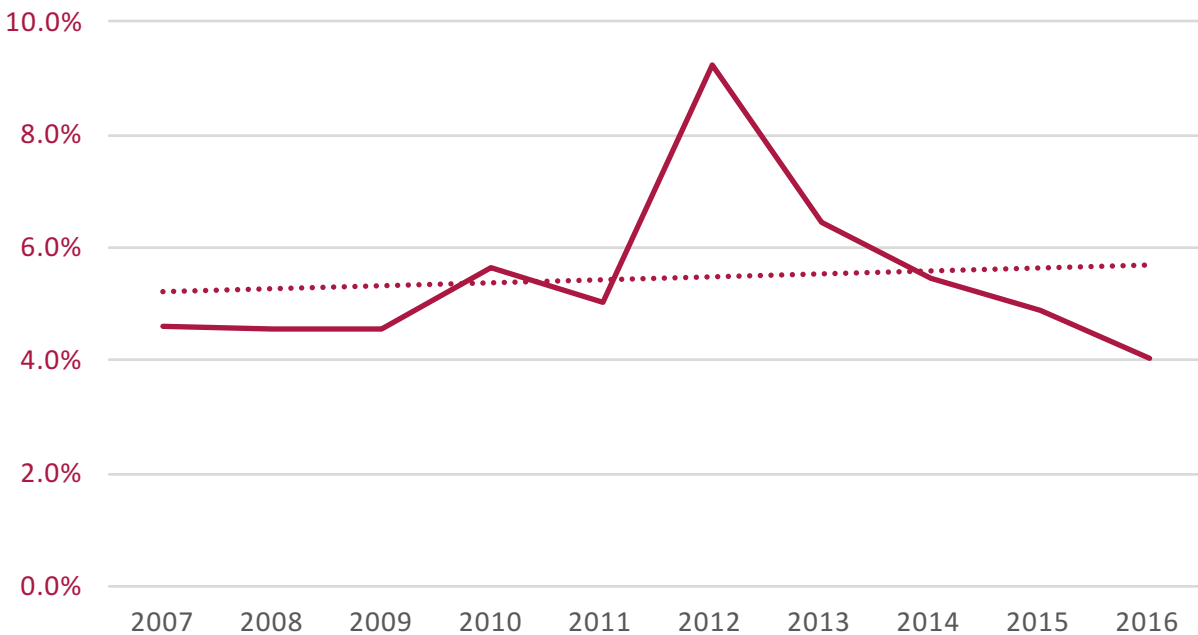
BNC SalesData has tracked the sale of print books in the trade market for more than 10 years. During this time, sales in the Romance category have remained almost completely flat with only a very slight increase. They have not only remained relatively constant throughout the growth of the ebook market in Canada, but also through an overall decline of the print book market.

Volume Sold



When we look at the Romance category's share of the overall print book market, we see a slight but notable increase.

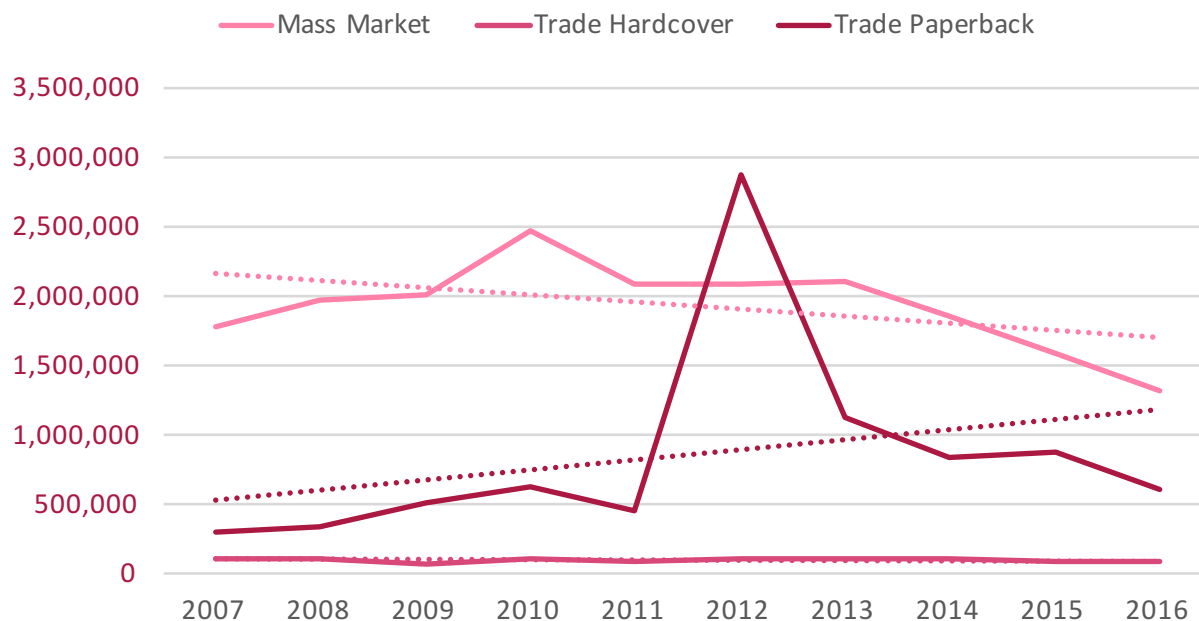
Market Share



Thanks to the popularity of certain titles (we are looking at you, *Fifty Shades*), sales in the Romance category have varied considerably over the past 10 years. When looking at the overall trendline, we are seeing an increase in paperback sales, a notable decline of mass market, and flat sales for hardcover.

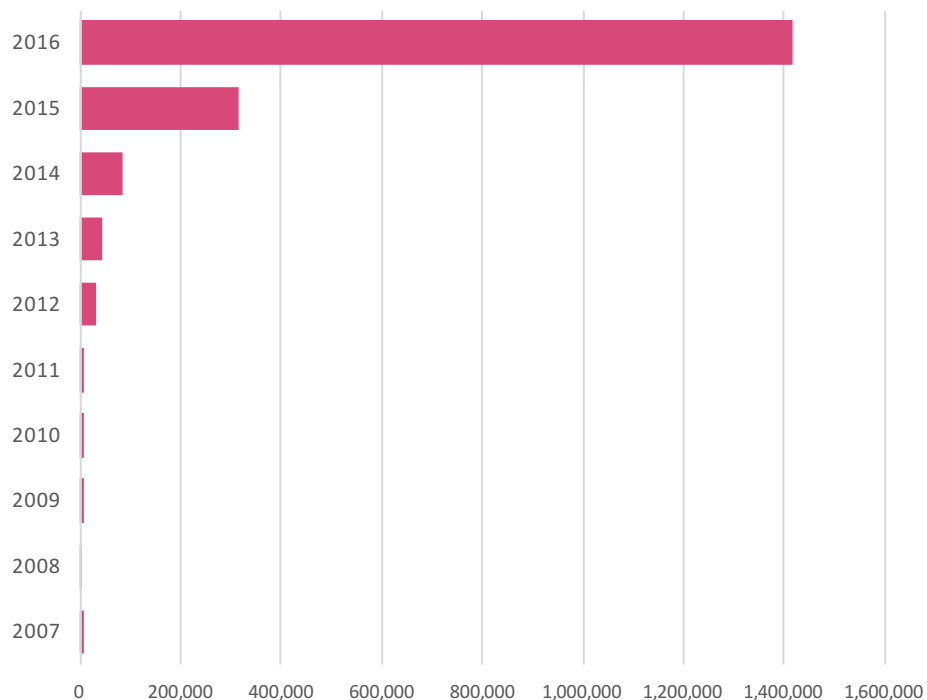
Though BNC SalesData does not track the sale of ebooks, we can make an educated guess from looking at consumer data and talking to publishers of Romance books that much of the mass-market readership has shifted to digital (i.e., ebooks). Canadian consumers really began purchasing ebooks in 2009/2010, and much of this purchasing is focused in the 'genre' fiction subjects: Mystery, Romance, Fantasy, and Science Fiction.

Sales by Format



As mentioned earlier, there is a wide selection of titles available in the Romance genre. When we review all the titles that sold copies in 2016, we find that the category is very frontlist heavy, possibly due to the volume at which Romance readers are purported to consume. The graph below shows the number of titles with units sold in 2016 by year of publication. By far, 2016 has the greatest number of selling titles.

Volume of Titles Selling in 2016 by Publication Year



The following are the top 10 bestselling Romance authors in Canada for 2015-2016:

1. Nora Roberts
2. E. L. James
3. Debbie Macomber
4. Nicholas Sparks
5. J. D. Robb
6. Sylvia Day
7. Robyn Carr
8. Sherryl Woods
9. Linda Lael Miller
10. Christine Feehan

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 Romance section in a bookstore, these are the tried and true titles from the last four years. To be included on this list, a Romance title had to rank within the top 400 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
Entwined with You	Day, Sylvia	9780425263921	Penguin Publishing	TP	\$16.00	04-06-2013
Dark Witch	Roberts, Nora	9780425259856	Penguin Publishing	TP	\$18.00	29-10-2013
Fifty Shades of Grey	James, E. L.	9780345803481	Knopf Doubleday	TP	\$17.95	03-04-2012
Fifty Shades Darker	James, E. L.	9780345803498	Knopf Doubleday	TP	\$17.95	17-04-2012
Fifty Shades Freed	James, E. L.	9780345803504	Knopf Doubleday	TP	\$17.95	17-04-2012
Reflected in You	Day, Sylvia	9780425263914	Penguin Publishing	TP	\$17.00	23-10-2012
At First Sight	Sparks, Nicholas	9781455545391	Grand Central Publishing	TP	\$16.00	04-06-2013
Walking Disaster	Mcguire, Jamie	9781476712987	Atria Books	TP	\$17.00	02-04-2013
Beautiful Disaster	Mcguire, Jamie	9781476712048	Atria Books	TP	\$22.00	14-08-2012
The Inn at Rose Harbor	Macomber, Debbie	9780345535252	Random House	MM	\$9.99	30-07-2013

Perennial Bestsellers continued

Title	Contributor	ISBN	Publisher	Binding	List Price	Pub Date
At First Sight	Sparks, Nicholas	9781455545384	Grand Central Publishing	MM	\$9.00	25-06-2013
Rush	Banks, Maya	9780425267042	Penguin Publishing	TP	\$16.00	05-02-2013
Beautiful Bastard	Lauren, Christina	9781476730097	Gallery Books	TP	\$17.00	12-02-2013
Born in Fire	Roberts, Nora	9780425266090	Penguin Publishing	TP	\$18.00	03-09-2013
The Hero	Carr, Robyn	9780778314592	Harlequin Enterprises, Ltd	MM	\$8.99	27-08-2013
Born in Ice	Roberts, Nora	9780425266106	Penguin Publishing	TP	\$18.00	01-10-2013
Fever	Banks, Maya	9780425267066	Penguin Publishing	TP	\$16.00	02-04-2013
Born in Shame	Roberts, Nora	9780425266113	Penguin Publishing	TP	\$18.00	03-12-2013
Burn	Banks, Maya	9780425267080	Penguin Publishing	TP	\$16.00	06-08-2013
The Rescue	Sparks, Nicholas	9780446610391	Grand Central Publishing	MM	\$10.50	01-08-2001
Wallbanger	Clayton, Alice	9781476741185	Gallery Books	TP	\$18.99	13-08-2013
The Guardian	Sparks, Nicholas	9780446613439	Grand Central Publishing	MM	\$10.50	01-03-2004
Beautiful Player	Lauren, Christina	9781476751405	Gallery Books	TP	\$17.00	29-10-2013
The Choice	Sparks, Nicholas	9780446618311	Grand Central Publishing	MM	\$9.49	01-04-2009
The Wedding	Sparks, Nicholas	9780446615860	Grand Central Publishing	MM	\$10.50	01-08-2005
Lover at Last	Ward, J. R.	9780451418807	Penguin Publishing	MM	\$8.99	01-10-2013
A Walk to Remember	Sparks, Nicholas	9780446608954	Grand Central Publishing	MM	\$9.50	01-09-2000
True Believer	Sparks, Nicholas	9780446618151	Grand Central Publishing	MM	\$10.50	01-03-2007
The Last Song	Sparks, Nicholas	9780446570961	Grand Central Publishing	MM	\$10.50	01-03-2010
Message in a Bottle	Sparks, Nicholas	9780446606813	Grand Central Publishing	MM	\$9.50	01-02-1999