



BNC RESEARCH

# Deep Dive: The Mystery/Detective Buyer

2016



BOOKNET  
CANADA

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# The Mystery/Detective 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 information that covers: 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 over 1,300 Mystery book purchases from 424 book buyers.

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

# Overview of the Mystery Buyer

When it comes to Mysteries there is no shortage of options available — you can find whodunits, cozies, hard-boiled and soft-boiled mysteries, police procedurals, amateur sleuths, romance, comedy, and courtroom dramas to name but a few. Accounting for approximately 2.2% of all book sales in the Canadian market, the Mystery genre is an important one with a lot of actively selling titles. In 2016 there were just under 16,000 individual ISBNs in this category with sales, the largest number of all the fiction categories, for a total volume of just under 900,000 units as tracked by BNC SalesData. For comparison, Romance has just under 13,000 active ISBNs and Science Fiction just under 6,000.

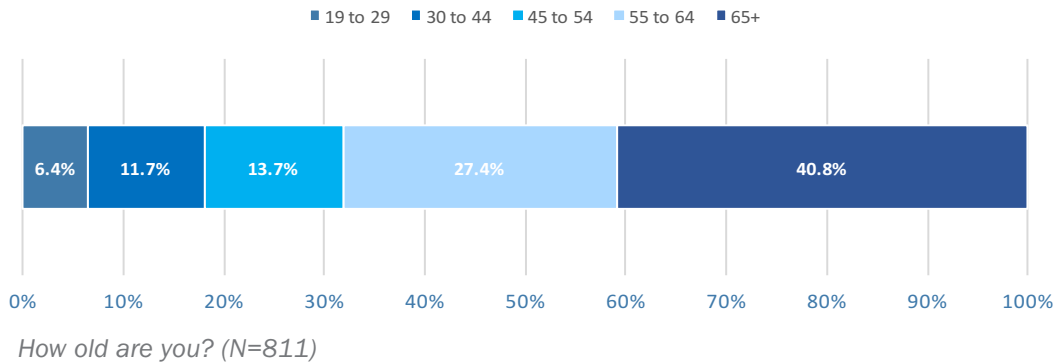
When we say “the Mystery buyer,” what do we mean? This study looks at those who have purchased books under the BISAC subject heading Fiction / Mystery & Detective. There are additional subject headings for “Crime” and “Thrillers,” making it potentially difficult for book buyers to clearly distinguish between these subjects, but this study looks as specifically as possible at “Mystery & Detective” only.

So, who buys Mystery books? The average Mystery buyer is:

- Female (63%)
- Over 55 years old
- Married
- Has a university degree
- Most likely to reside in the Maritimes (24%), though there is fairly equal distribution across Canada, with buyers least likely to reside in Western Canada (14%)

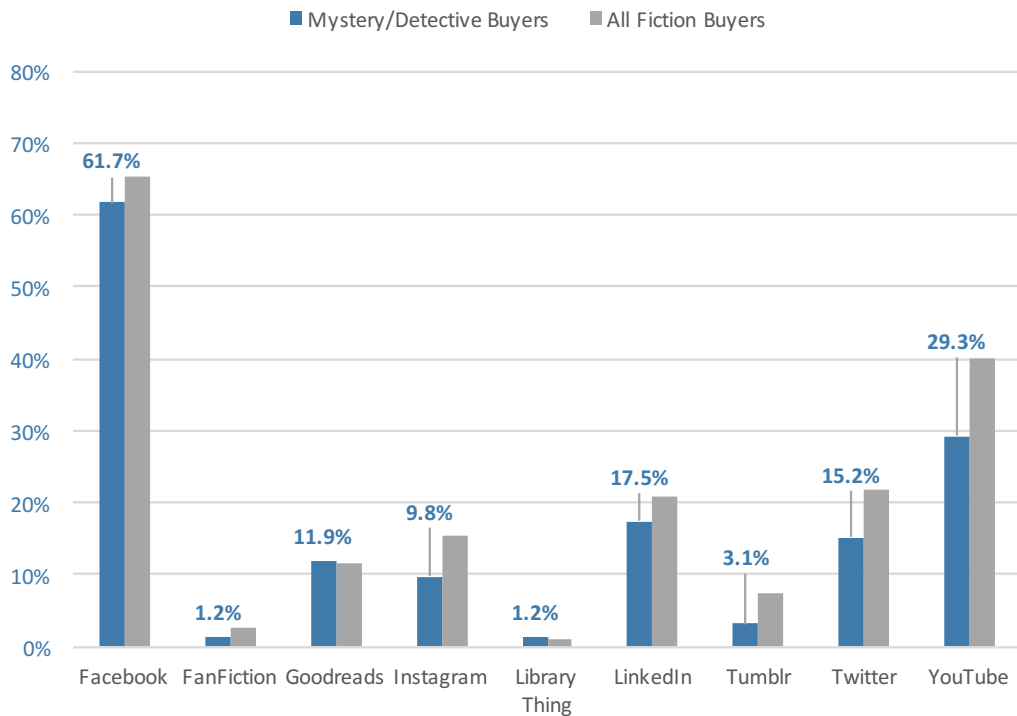
When we look at all tracked purchases from Mystery buyers we find that just over 68% of purchases were made by those 55 and older, with the average age at 58 years old. The graph below takes into account all 1,300 tracked purchases, so the age brackets that purchase in higher volume are more heavily represented.

## Mystery Buyers by Age



When it comes to social media, Mystery buyers are not very active. They have the lowest participation in Facebook (62%) compared to the other genre buyers in the Deep Dive series, which is also lower than the average Fiction buyer (65%). In general, the average Mystery buyer uses every social network we track less than the average Fiction buyer with the exception of Goodreads.

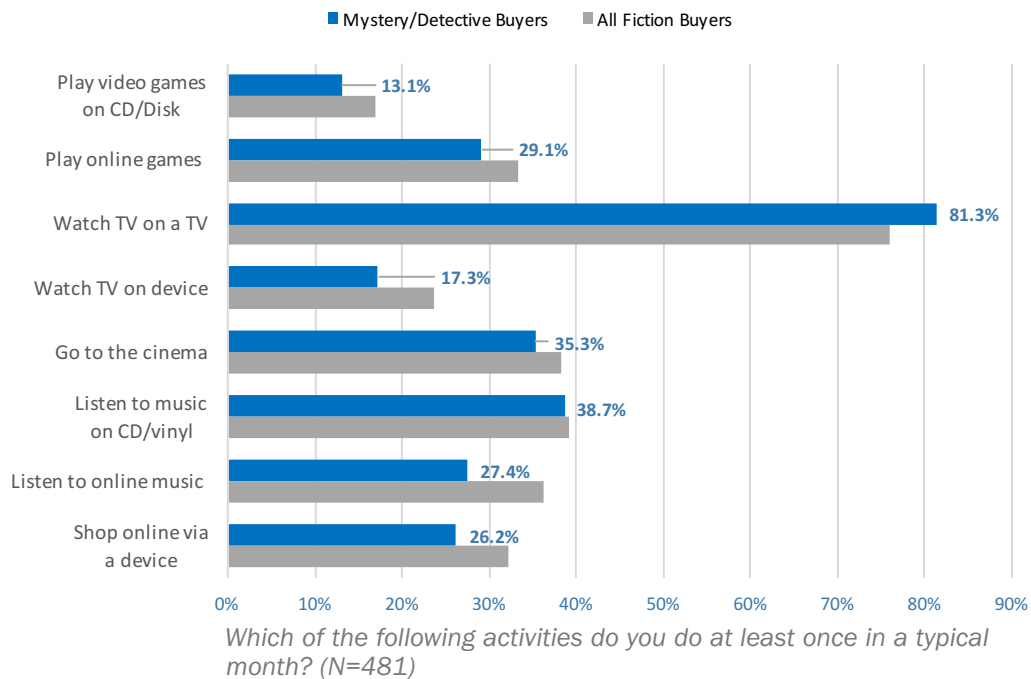
## Use of Social Networks



In which of the following social networks, communities, or sharing sites do you currently participate? (N=481, N=1,822)

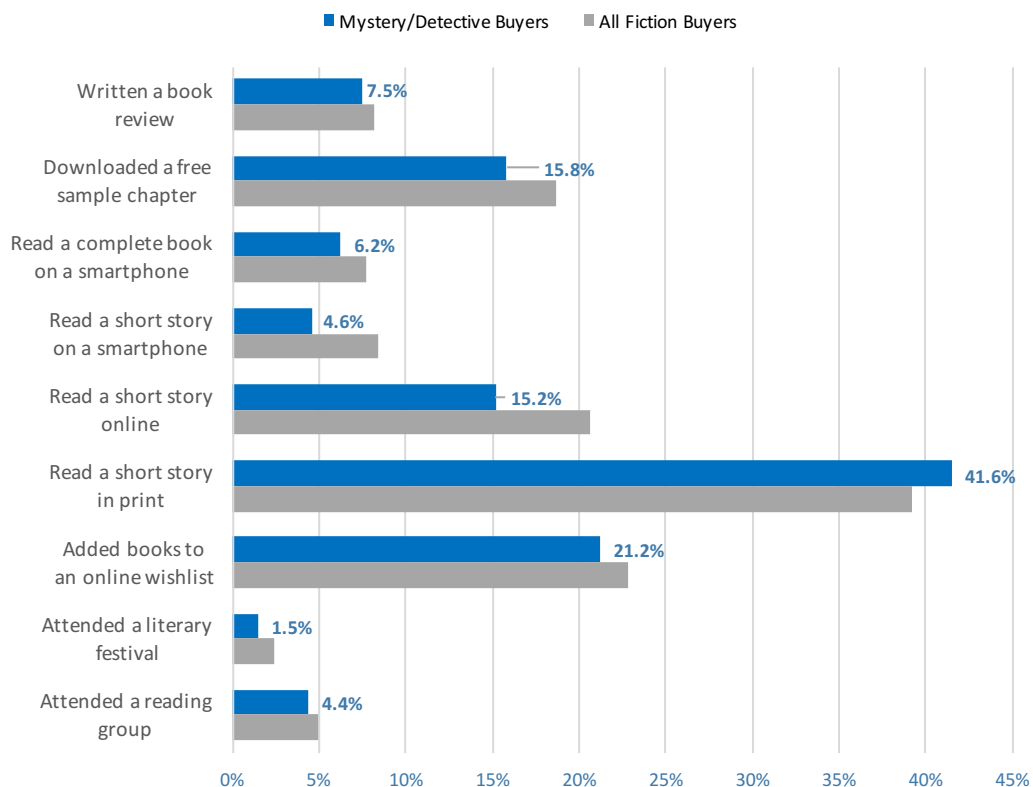
When we look at some overall activities that Mystery buyers partake in each month, we find that many are inclined to watch TV on an actual television whereas they are less likely than the average Fiction buyer to shop online, listen to music online, play video games, or watch TV on a device. Generally, we see an overall trend of being less technologically motivated than the average Fiction buyer.

## Activities Participated in Monthly



We also had a look at what book-related activities Mystery buyers have participated in over the last 12 months. Once again, Mystery buyers tend to be less involved in “book activities” than the average Fiction buyer. Activities such as writing book reviews, reading online, or adding books to wish lists all rank lower for Mystery buyers. The only category that was an exception was reading short stories in print.

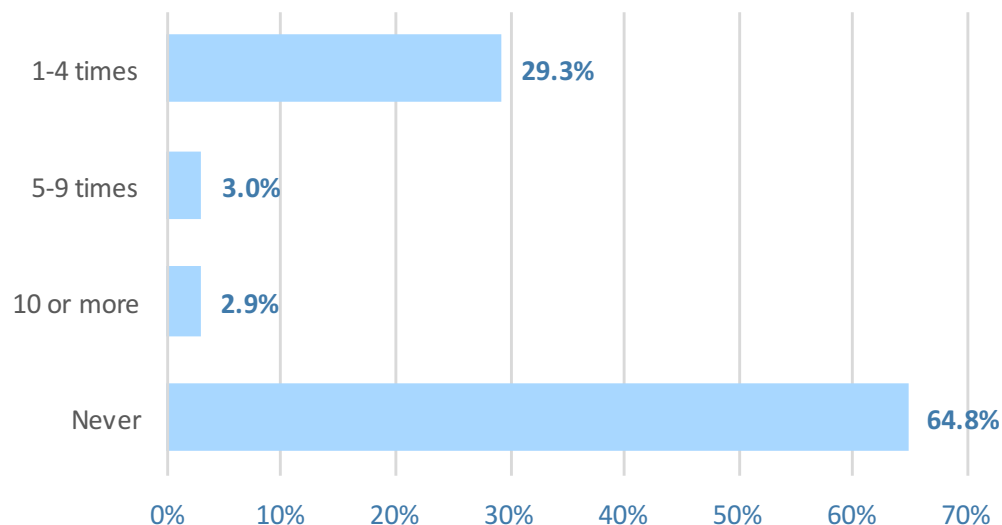
## Activities in Last 12 Months



Which of the following have you done in the last 12 months? (N=481, N=1822)

Mystery buyers are moderate to low library users with just under 30% using the public library 1-4 times in the last month (either online or in person). Perhaps surprisingly, Mystery buyers have the greatest percentage of those who have not used the public library in the last month (65%).

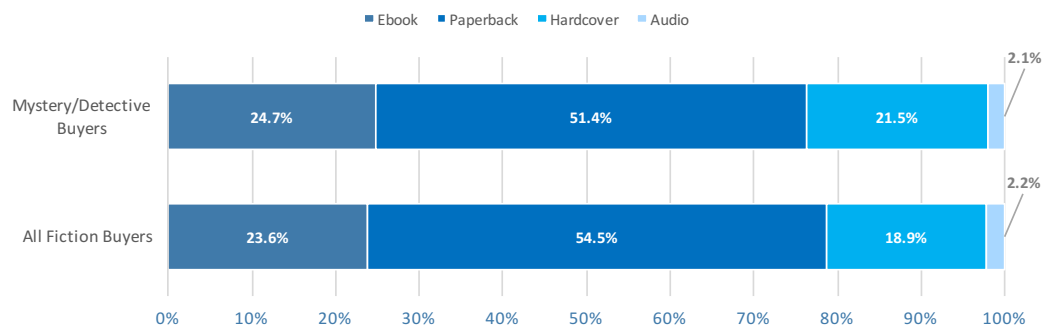
## Use of Public Library



*How many times have you visited the public library (online or in person) in the last month? (N=730)*

Just over 51% of all purchases of Mystery books are paperbacks, which includes both mass market and trade paper. Representation of ebook purchases is fairly moderate at just under 25%. Two percent of Mystery buyers indicated purchasing an audiobook, which may be accurate but there may also be some confusion when it comes to purchasing vs streaming or renting.

## Format Distribution

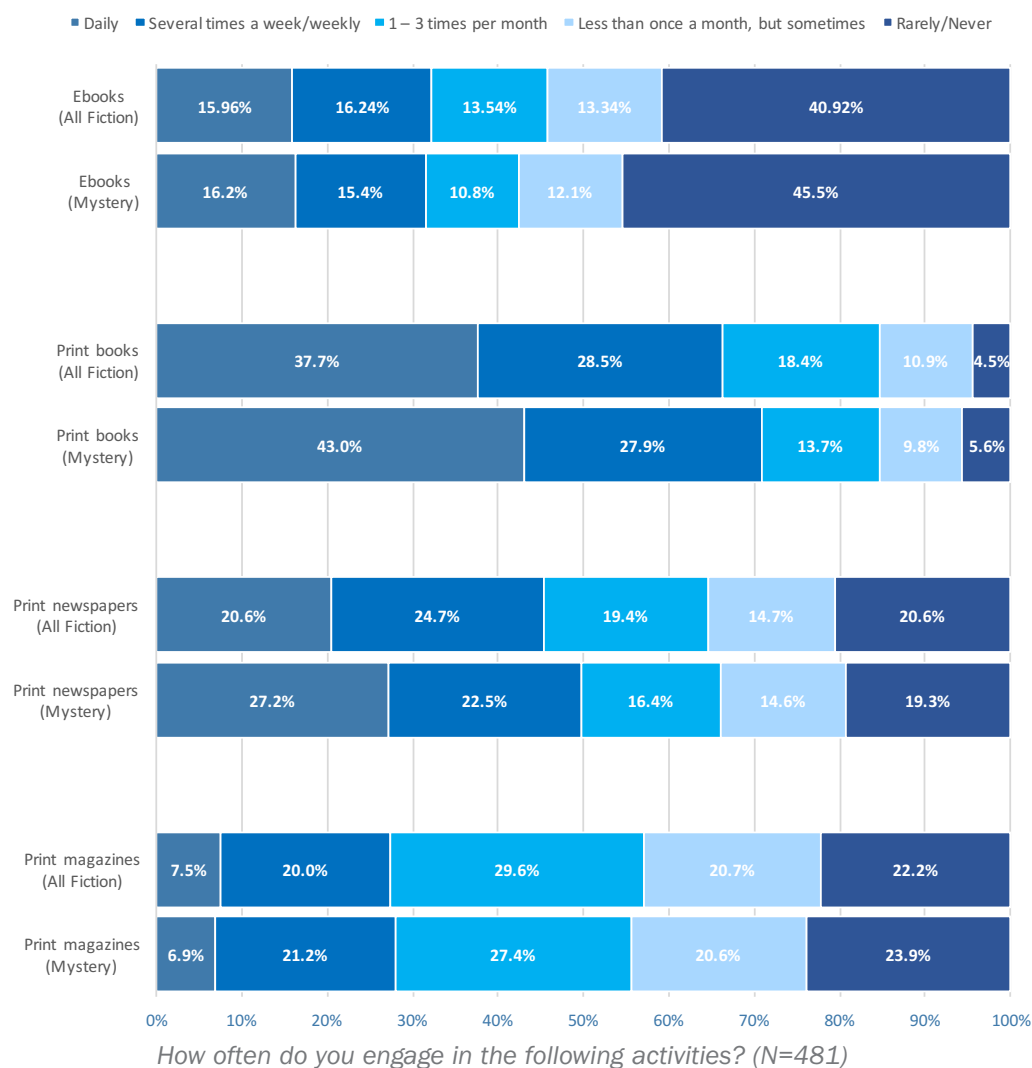


*What format is the book you purchased? (N=730, N=3519)*

The graph below looks not at whether Mystery buyers participate in specific activities but rather the frequency at which they participate. For example, of all Mystery ebook buyers, 16% of them read daily; of all Mystery print book buyers, 43% of them read daily. Note that reading ebooks and print books here does not necessarily refer to reading Mystery books, but just books generally.

This data shows us a predisposition towards print, as Mystery buyers read print books and print newspapers at a higher frequency than the average Fiction buyer.

## Reading Frequency

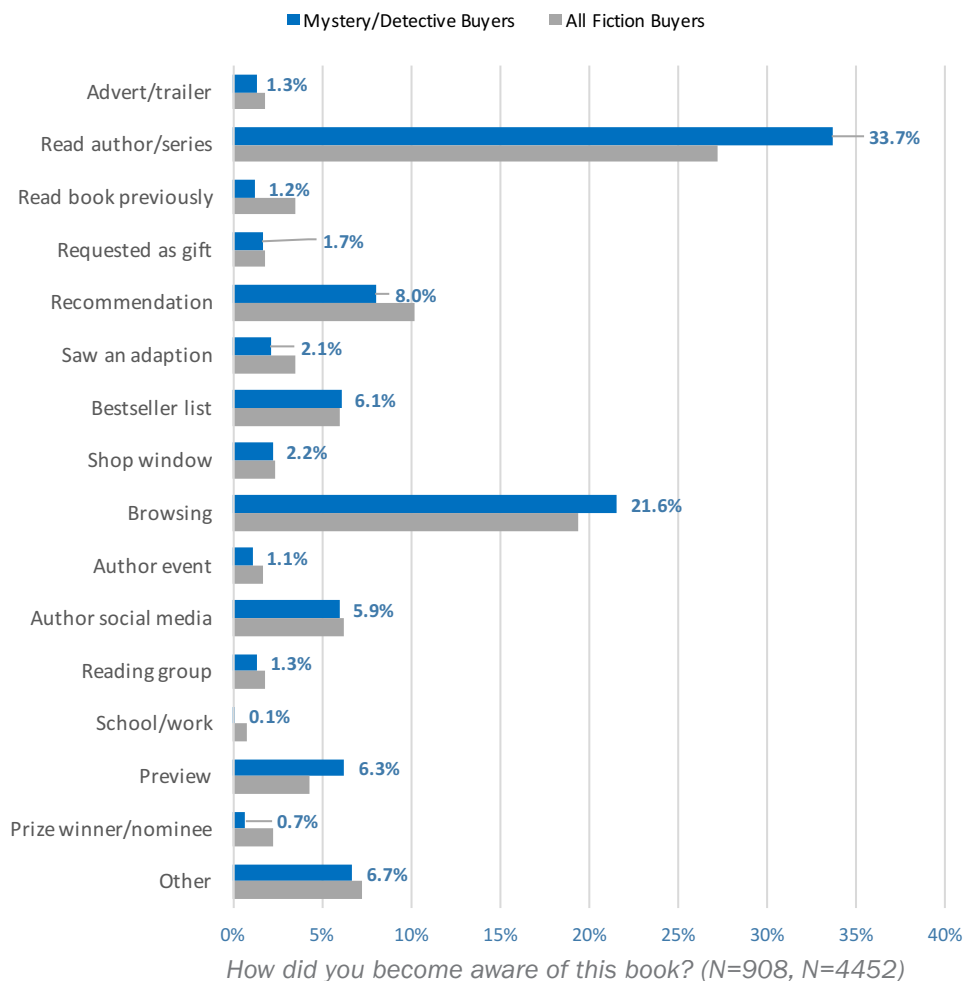


# Discoverability and Decision to Buy

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

Series and author loyalty are king with Mystery buyers. More than any other category reviewed in the Deep Dive series, 34% became aware of their book either because it was part of a series or because they were familiar with the author. More than half of the Mystery titles selling in 2016 were part of a series.

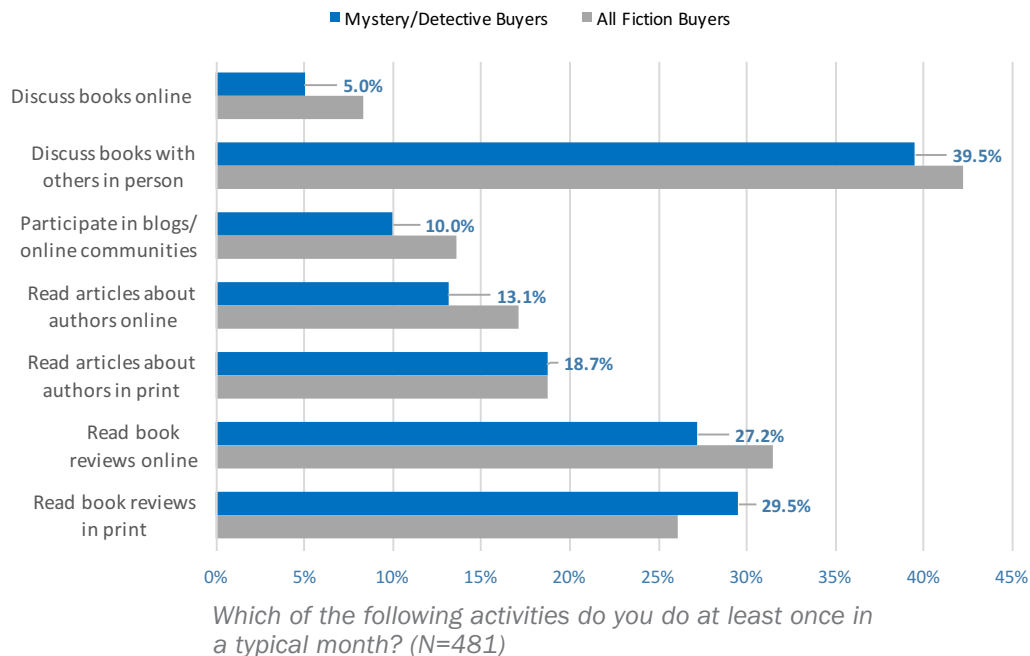
## Awareness



When we dive into some specific awareness factors in more detail, we find that certain factors that are more important than others in creating awareness for Mystery book buyers. While all the following activities are spread pretty equally between online and in-person, Mystery buyers tend to be online less than the average Fiction buyer, so the online factors play a slightly lesser role in creating awareness for them. Among those, however, reading online reviews (especially those on sites like Goodreads or other sites that allow user-submitted reviews) and browsing online bookseller websites are the most popular, while browsing in physical bookstores is the most common in-person activity.

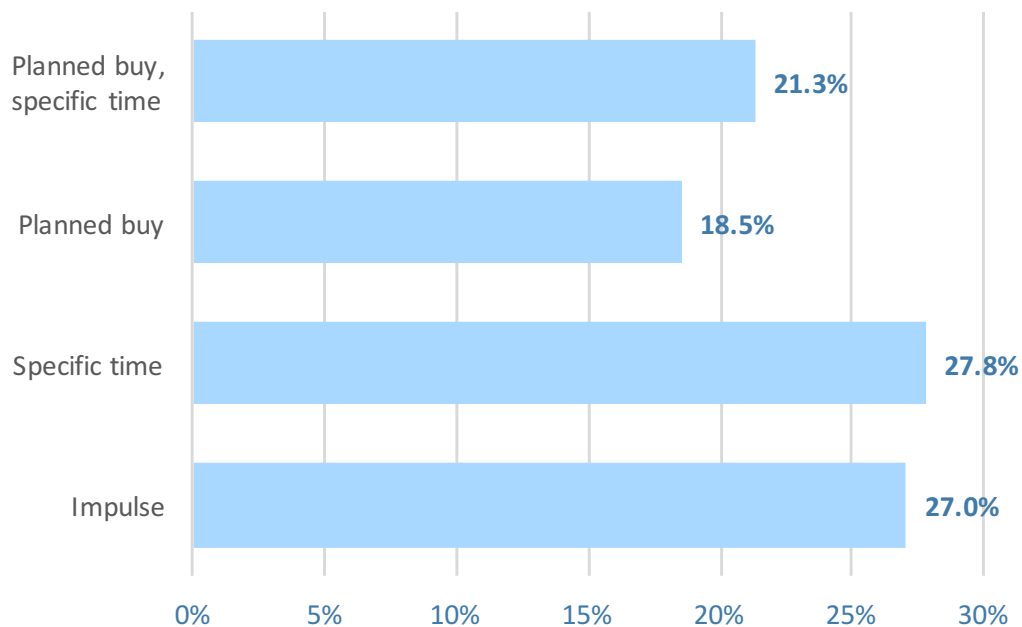
When it comes to reading reviews, 27% of Mystery buyers read online book reviews at least once in a typical month, and 30% read print reviews.

## Book-Related Activities in a Typical Month



Mystery buyers are slightly impulsive buyers, with 27% of purchases being fully impulsive, the highest of any of the Fiction genres we explored. A fully impulsive buy means that the purchaser did not plan to buy that specific book or any book at the time of purchase. On the other hand, 21% of Mystery buyers fully planned their purchase, i.e., planned to buy that particular book at that particular time, while 19% planned to buy that book at some point in time and 28% planned to buy a book at that time but not the specific book they purchased.

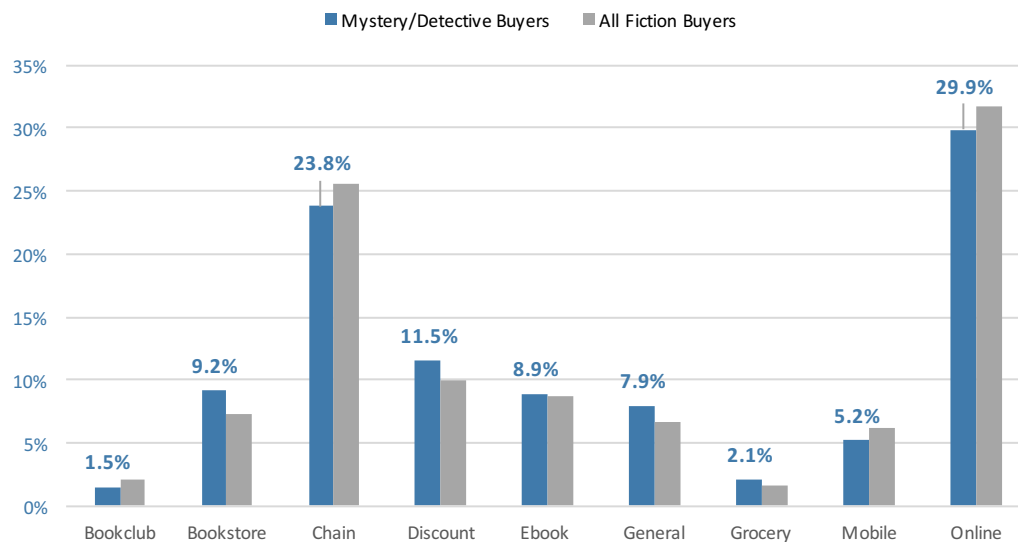
## Impulse vs. Planned Purchase



*Which of the following best describes your decision to buy this specific book at that time?*

At 30%, online is the single largest channel for purchasing Mystery books. And when online, mobile, and ebook purchases are combined, the online channel grows to an impressive 44% of all purchases. Mystery purchases in physical stores account for 47%, primarily at chain bookstores (24%).

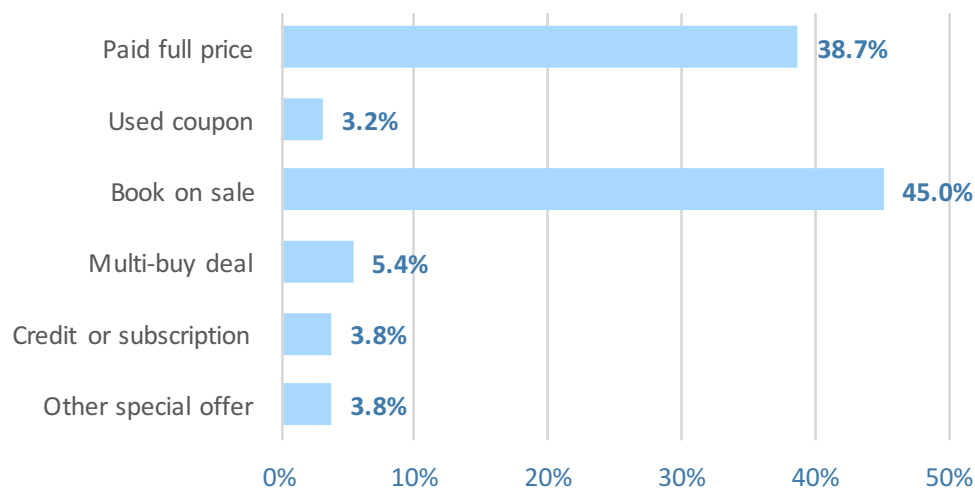
## Purchase by Channel



*How would you describe where you bought this book?*

Mystery buyers like a good deal. More than any other genre explored in this series, Mystery buyers are most likely to buy their book on sale (45%) or to use a coupon to make their purchase (7%). Additionally, 5% made their purchase through a multi-book-buying deal.

## Discounted Pricing



*Did you buy the book at full price or did you buy it at a special price or offer? (N=755)*

When asked if they thought the book they purchased was a good value, Mystery book buyers said 56% of their purchases were excellent value. This is slightly lower than an aggregate of comparable Fiction categories, which sees 57% of purchases reported as excellent value.

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

### List Price from BiblioShare

| Hardcover | Paperback | Ebook   | Audiobook |
|-----------|-----------|---------|-----------|
| \$32.89   | \$15.88   | \$10.99 | \$25.93   |

When we asked respondents what price they paid for their Mystery 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.

### Price Paid from Survey

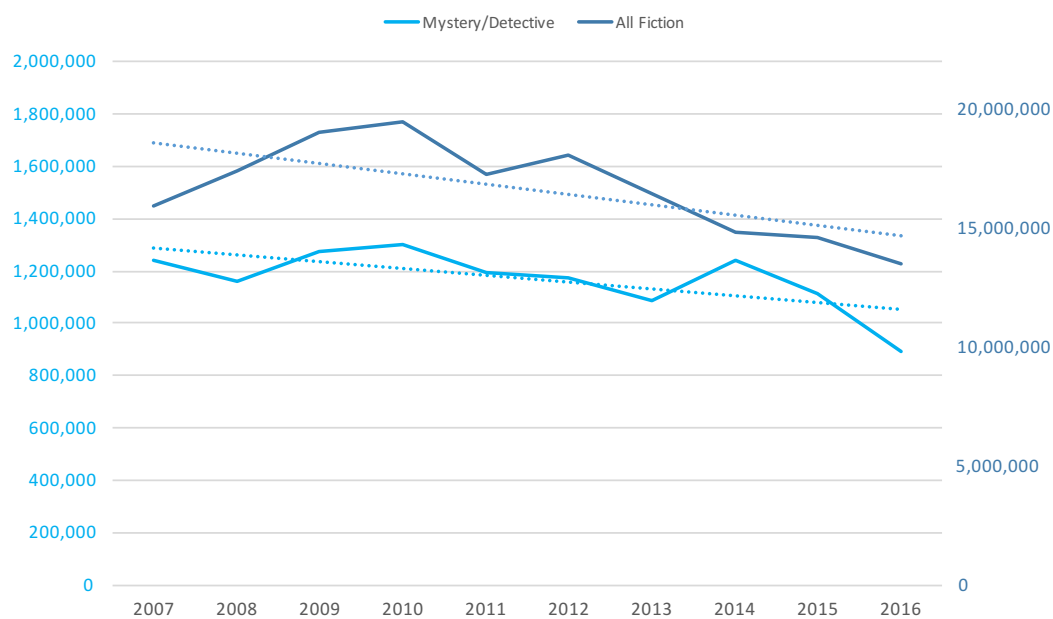
| Hardcover | Paperback | Ebook  | Audiobook |
|-----------|-----------|--------|-----------|
| \$16.64   | \$9.80    | \$7.39 | \$10.90   |

*How much did you pay for this book (before tax?) (N=773)*

## Sales Analysis of the Mystery Category

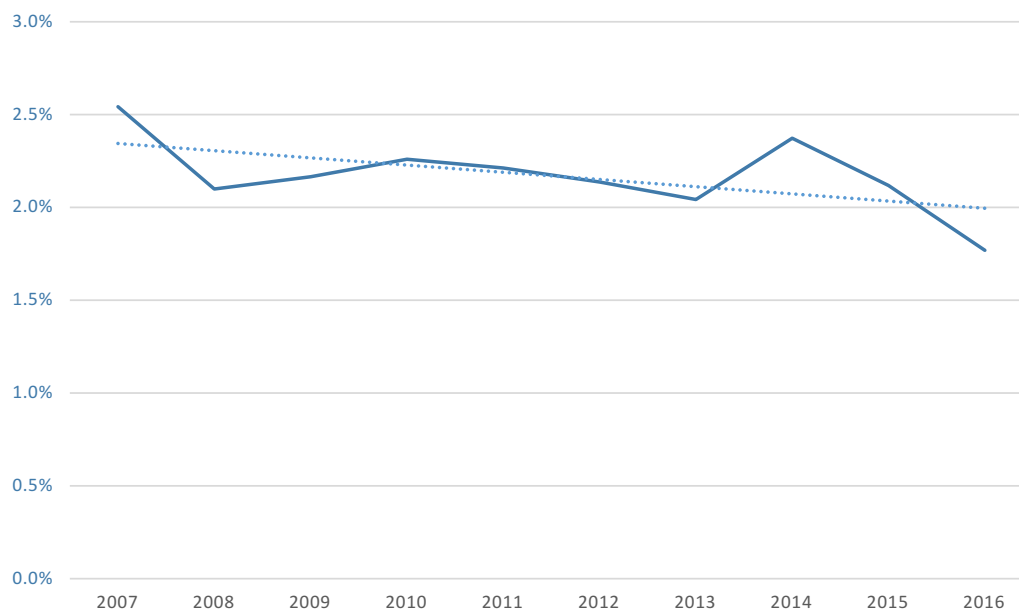
BNC SalesData has tracked the sale of print books in the trade market for more than 10 years. During this time, sales in the Mystery category have remained relatively flat — only seeing a very slight decline. They have not only remained relatively constant throughout the growth of the ebook market in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

## Total Volume Sold



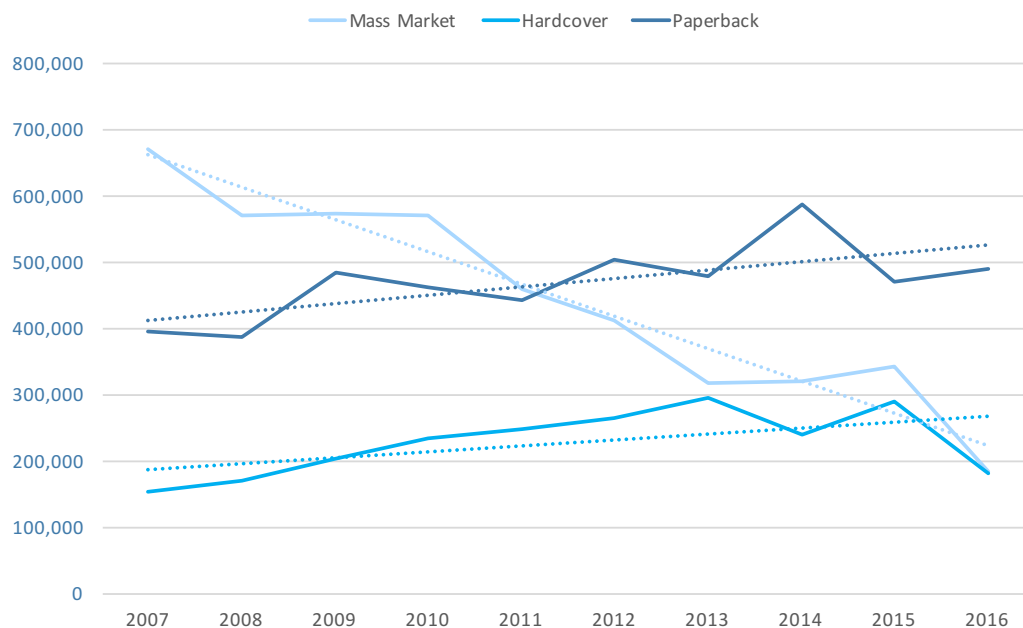
When we look at the Mystery category's share of the overall print book market, we do see a bit more of a decline.

## Market Share



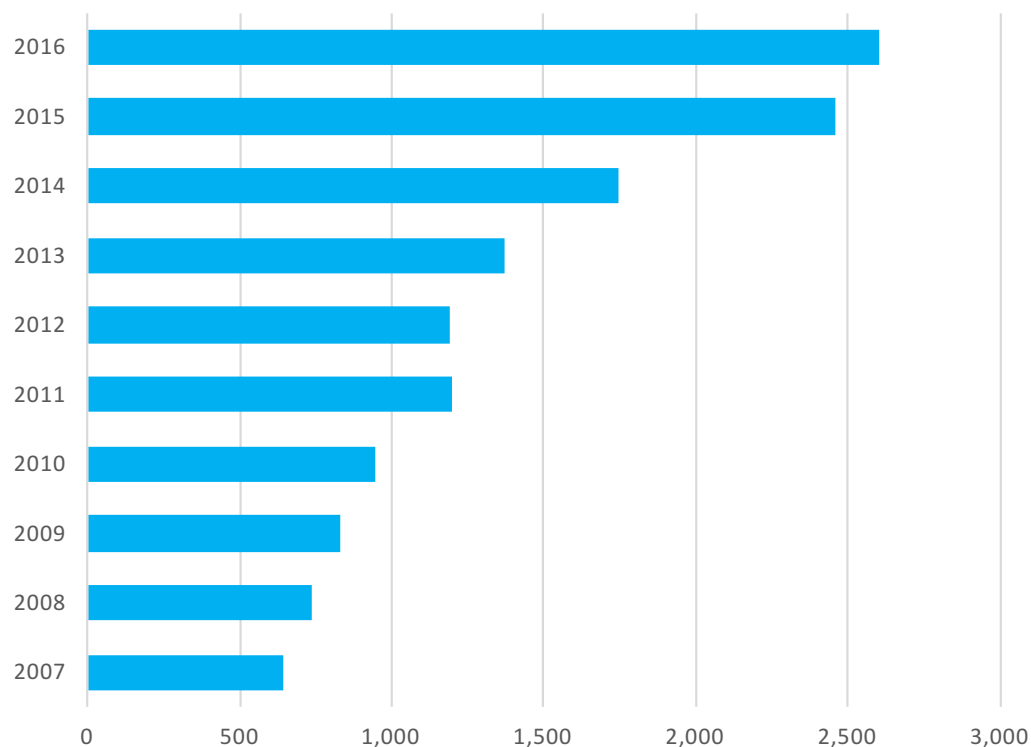
An examination of print sales over the last 10 years tells an interesting story. While Mass Market sales have declined substantially, sales of both Hardcover and Trade Paperback have increased. Though BNC SalesData does not track the sale of ebooks, we can make an educated guess from looking at consumer data and talking to publishers of Mystery 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 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 Mystery genre. When we review all the titles that sold in 2016, we find that the category is fairly backlist heavy, which shows that books have the potential to stay around for some time. The graph below shows the number of titles available by year of publication. Unsurprisingly, 2016 has the greatest number of available titles, but going back over a 10-year period we find that over 500 titles with a 2007 publication date are still selling. Additionally, if we look at books sold in 2016 with a publication date between 1980 and 1999, we find that over 3,000 titles are still actively selling in Canada.

## Volume of Titles Selling in 2016 by Publication Year



For the top-selling Mystery authors, we find a mix of newcomers like Gillian Flynn and some classics including Agatha Christie. The top 10 bestselling Mystery authors in Canada for 2015-2016 are:

1. Louise Penny
2. David Lagercrantz
3. Shari Lapeña
4. Ian Rankin
5. James Patterson
6. Robert Galbraith
7. Janet Evanovich
8. Gillian Flynn
9. Karin Slaughter
10. Agatha Christie

# Perennial Bestsellers

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 Mystery section in a bookstore, these are the tried and true titles from the last four years. To be included on this list, a Mystery title had to rank within the top 200 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   |
|------------------------------------------|----------------------------------|---------------|------------------------|--------|------------|------------|
| Joyland                                  | King, Stephen                    | 9781781162644 | Titan Books            | TP     | \$17.50    | 04-06-2013 |
| The Lost Years                           | Clark, Mary Higgins              | 9781451668926 | Pocket Books           | MM     | \$9.99     | 19-03-2013 |
| Notorious Nineteen                       | Evanovich, Janet                 | 9780345527769 | Random House           | MM     | \$10.99    | 19-11-2013 |
| The Beautiful Mystery                    | Penny, Louise                    | 9781250031129 | St. Martin's Press     | TP     | \$18.50    | 02-07-2013 |
| The Nightmare                            | Kepler, Lars; Wideburg, Laura A. | 9780771095887 | McClelland & Stewart   | TP     | \$19.95    | 29-01-2013 |
| Standing in Another Man's Grave          | Rankin, Ian                      | 9781409109402 | Orion Publishing       | TP     | \$15.99    | 16-07-2013 |
| Frozen Heat                              | Castle, Richard                  | 9780786891436 | Hyperion Press         | MM     | \$10.99    | 30-04-2013 |
| Still Life                               | Penny, Louise                    | 9780751547382 | Little, Brown Book     | TP     | \$14.99    | 07-06-2011 |
| Watching the Dark                        | Robinson, Peter                  | 9780771076497 | McClelland & Stewart   | TP     | \$19.95    | 11-06-2013 |
| V Is for Vengeance                       | Grafton, Sue                     | 9780425250563 | Penguin Publishing     | MM     | \$8.99     | 30-10-2012 |
| A Trick of the Light                     | Penny, Louise; Penny, Louise     | 9781250007346 | St. Martin's Press     | TP     | \$18.50    | 03-07-2012 |
| Forsaken                                 | Bowden, Oliver                   | 9780718193683 | Penguin Books          | TP     | \$16.00    | 06-11-2012 |
| Phantom                                  | Nesbø, Jo; Bartlett, Don         | 9780307361080 | Random House of Canada | TP     | \$19.95    | 02-10-2012 |
| The Cruellest Month                      | Penny, Louise                    | 9780751547481 | Little, Brown Book     | TP     | \$15.99    | 07-06-2011 |
| The Limpopo Academy of Private Detection | Mccall Smith, Alexander          | 9780307398291 | Knopf Canada           | TP     | \$19.95    | 05-03-2013 |

## Top 30 Perennial Bestsellers continued

| Title                     | Contributor              | ISBN          | Publisher                | Format | List Price | Pub Date   |
|---------------------------|--------------------------|---------------|--------------------------|--------|------------|------------|
| Dead Cold                 | Penny, Louise            | 9780751547436 | Little, Brown Book       | TP     | \$15.99    | 07-06-2011 |
| I Am Half-Sick of Shadows | Bradley, Alan            | 9780385668118 | Doubleday Canada         | TP     | \$19.95    | 30-10-2012 |
| Until the Night           | Blunt, Giles             | 9780679314363 | Random House of Canada   | TP     | \$19.95    | 30-04-2013 |
| The Absent One            | Adler-Olsen, Jussi       | 9780142196830 | Penguin Publishing       | TP     | \$22.00    | 07-05-2013 |
| Bury Your Dead            | Penny, Louise            | 9780751544442 | Little Brown & Company   | TP     | \$15.99    | 12-04-2011 |
| The Yard                  | Grecian, Alex            | 9780425261279 | Penguin Publishing       | TP     | \$17.00    | 02-04-2013 |
| Broken Harbour            | French, Tana             | 9780340977651 | Hodder & Stoughton       | TP     | \$15.99    | 07-05-2013 |
| 1st to Die                | Patterson, James         | 9780446610032 | Grand Central Publishing | MM     | \$10.50    | 01-02-2002 |
| Explosive Eighteen        | Evanovich, Janet         | 9780345527738 | Random House             | MM     | \$10.99    | 15-05-2012 |
| The Redbreast             | Nesbø, Jo; Bartlett, Don | 9780099546771 | Random House             | TP     | \$19.95    | 02-11-2009 |
| Two for the Dough         | Evanovich, Janet         | 9780312948962 | St. Martin's Press       | MM     | \$10.99    | 29-05-2007 |
| The Neighbor              | Gardner, Lisa            | 9780553591903 | Random House             | MM     | \$9.99     | 22-06-2010 |
| One for the Money         | Evanovich, Janet         | 9780312990459 | St. Martin's Press       | MM     | \$10.99    | 14-04-2003 |
| Heat Rises                | Castle, Richard          | 9780786891429 | Hyperion Press           | MM     | \$11.99    | 24-04-2012 |
| Smokin' Seventeen         | Evanovich, Janet         | 9780345527707 | Random House             | MM     | \$10.99    | 15-11-2011 |