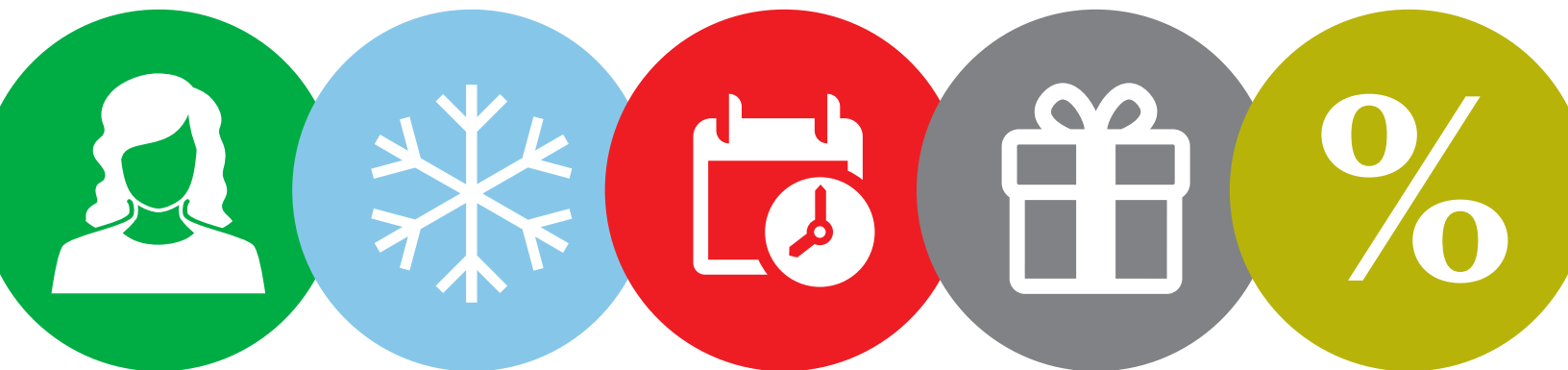




BNC RESEARCH

The Holiday Shift:

**Sales impact by category
during the holiday season
2013 – 2015**



11.2016

PREPARED BY BOOKNET CANADA STAFF



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CANADA**

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Summary

The holiday season produces larger spikes for book sales in Canada than any other factor. To help publishers and booksellers account for changing demands, we have created a detailed breakdown of market share shifts by category over the holiday season. This study is an update to *The Holiday Shift* study released in 2009.

Although the entire market undergoes a significant boom during the holiday season, not all subject categories are equally affected. Based on our 2009 study, some categories experienced a 190% increase in holiday market share compared to the baseline, while other categories experienced a decrease by more than 50%.

How have these shifts changed in the past six years? We cannot know precisely why these shifts occurred, but by analyzing data from the past three years, we can determine the holiday season's sales trends and gain a better understanding of what to expect for the seasons to come.

Based on statistics compiled using BNC SalesData and outlined in this study, we have determined that:

- Fiction, the category that occupies the largest chunk of baseline market share year-after-year, experiences a consistent holiday shift decrease every year. While this category sells the greatest volume of books during the year, in the past three years Juvenile Fiction titles (including YA Fiction) have sold more units than Fiction titles during the holiday season.
- In 2015, colouring books came and conquered. The Games category, which houses adult colouring books, already saw consistently positive holiday shifts in 2013 and 2014. The colouring book craze boosted this category to first place with the highest holiday shift increase in 2015.

- Holiday season trends can remain relatively consistent, despite unusual baseline market share. In the past three years, Non-Fiction categories such as Sports & Recreation and Humour displayed consistent positive holiday shifts, even when the first three quarters of the year were less consistent.
- Although the Biography & Autobiography category has experienced a positive holiday shift in the past three years, this shift is decreasing due to a combination of yearly increases in baseline market share and decreases in holiday market share.
- The Education, Language Arts & Disciplines, Mathematics, Medical, and Study Aids categories all have consistently negative market shares and experience some of the greatest holiday shift decreases year-over-year.
- Blockbuster titles can upset consistent trends by significantly increasing a category's holiday market share in a specific year.

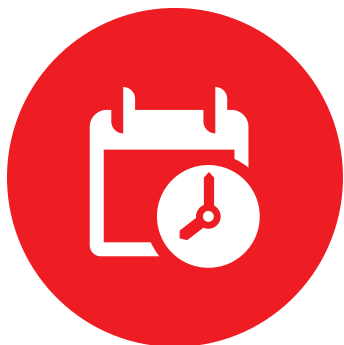


Introduction

Imagine: with the season of pumpkin finally behind you, you are now ready to open your pop-up bookstore for the holiday season. What would it look like? Which subject categories would make it to the shelves? How much shelf space would you allocate for each of these categories? Which of their titles would publishers want stocked?

The holiday season results in large sales increases across the board, but it is difficult to accurately predict the specific categories that will perform exceptionally well, or the categories that will perform less than ideally. This study seeks to identify trends in buying habits over the holiday season in comparison with the rest of the year, and so includes:

- **Baseline market share:** A look at the market during the first three quarters of the year.
- **Holiday season:** The six-week holiday season ending the last week of December.
- **Holiday shift:** By comparing a category's holiday market share against its baseline market share, we can determine how much a subject category shifts during the holiday season: which categories grow, which categories shrink, and by how much?
- **Subject categories:** A closer look at a few subject categories gives us a better idea of buyer behaviour.



Approach

As the holiday sales spike is enormous and analyzing sales volume would be overwhelming, we've elected to show increases in market share by subject. In other words, we've displayed each category's piece of the whole market and analyzed how these portions shift in size during the holidays.

To start, we created a baseline by calculating a subject's average market share, based on volume sold, for the first three quarters of 2013, 2014, and 2015. Then, we determined market share percentages for the holiday season, which we are defining as the six-week period ending the last week of December. Finally, we compared the category's market share for the holiday season to its baseline to determine the difference in performance during the shift compared to the rest of the year.

After looking at the market share changes for 2013, 2014, and 2015, we were able to see trends that occur year-over-year, as well as categories that have unusual years. Closer analysis of the Biography & Autobiography, Comics & Graphic Novels, Cooking, Fiction, Games, Humour, Juvenile Fiction, and Juvenile Non-Fiction categories allowed us to develop a greater understanding of market share shifts over the holiday season.

Caveats

- **BNC SalesData representation:** Based on publisher feedback, we estimate that BNC SalesData represents 85% of trade book industry sales. In the remaining 15% are some non-traditional retailers and retail categories that are not fully represented by BNC SalesData. Sales from these categories may not be as accurately represented in this study.
- **K-12 and higher education sales:** Our panel does not include direct institutional sales to schools or college/university textbook sales.
- **Non-book sales:** Some non-fiction categories that make up a substantial portion of the market during Christmas, such as Humour and Juvenile Non-Fiction, are augmented by sales of calendars, day planners, and children's activity books.

Data

The market share for each subject category shifts over the six weeks leading up to the end of December, a result of the substantial growth experienced during the holiday season. To compare this holiday shift to the rest of the year, we've created a baseline that represents the market share percentage for the first three quarters of 2013, 2014, and 2015.

The table below compares the baseline market share with the holiday season market share, and shows the market share percent change that represents the holiday shift.



Subject	2013			2014			2015		
	Baseline	Holiday Season	Percent Change	Baseline	Holiday Season	Percent Change	Baseline	Holiday Season	Percent Change
Antiques & Collectibles	0.04%	0.04%	-2.45%	0.04%	0.06%	42.24%	0.04%	0.05%	13.02%
Architecture	0.06%	0.06%	-0.95%	0.05%	0.10%	85.59%	0.05%	0.06%	22.32%
Art	0.39%	0.60%	55.93%	0.37%	0.52%	40.78%	0.49%	1.07%	120.99%
Bibles	0.12%	0.07%	-42.23%	0.10%	0.07%	-23.29%	0.12%	0.10%	-18.82%
Biography & Autobiography	2.74%	6.49%	137.11%	3.16%	5.42%	71.41%	3.49%	4.20%	20.40%
Body, Mind, & Spirit	0.75%	1.11%	46.75%	0.95%	1.09%	15.54%	1.09%	1.20%	10.09%
Business & Economics	1.88%	1.31%	-30.10%	1.95%	1.39%	-28.85%	1.80%	1.27%	-29.39%
Comics & Graphic Novels	1.46%	1.42%	-2.87%	1.64%	1.56%	-4.70%	1.81%	1.67%	-7.59%
Computers	0.55%	0.21%	-61.09%	0.48%	0.32%	-33.53%	0.33%	0.21%	-35.84%
Cooking	2.86%	3.16%	10.46%	2.48%	3.74%	50.87%	2.11%	3.16%	49.87%
Crafts & Hobbies	0.30%	0.43%	44.09%	0.37%	0.37%	-0.20%	0.29%	0.43%	51.97%
Design	0.13%	0.38%	201.31%	0.12%	0.26%	107.08%	0.15%	0.38%	151.43%
Drama	0.10%	0.04%	-64.76%	0.10%	0.04%	-64.17%	0.10%	0.04%	-62.30%
Education	0.38%	0.18%	-52.43%	0.54%	0.15%	-72.27%	0.56%	0.18%	-68.22%
Family & Relationships	0.91%	0.48%	-46.84%	0.84%	0.57%	-32.24%	0.77%	0.48%	-37.05%
Fiction	33.73%	24.74%	-26.64%	30.27%	23.19%	-23.40%	30.31%	22.63%	-25.34%
Foreign Language Study	0.54%	0.27%	-50.62%	0.47%	0.28%	-40.69%	0.45%	0.27%	-40.58%
Games	0.57%	1.01%	76.30%	0.61%	1.17%	90.51%	1.96%	5.48%	180.49%
Gardening	0.19%	0.10%	-48.63%	0.17%	0.09%	-49.48%	0.14%	0.09%	-39.26%
Health & Fitness	2.49%	1.27%	-49.06%	2.02%	1.11%	-44.92%	1.73%	0.99%	-42.76%
History	1.19%	1.93%	62.09%	1.27%	1.62%	28.19%	1.19%	1.49%	25.74%
House & Home	0.24%	0.15%	-36.20%	0.20%	0.12%	-38.58%	0.36%	0.33%	-8.40%
Humour	1.19%	2.95%	147.81%	0.98%	2.59%	165.23%	1.06%	2.27%	113.44%
Juvenile Fiction	26.60%	28.43%	6.87%	30.45%	30.22%	-0.75%	29.48%	29.61%	0.43%
Juvenile Nonfiction	6.55%	5.75%	-12.20%	7.03%	7.18%	2.16%	7.30%	7.63%	4.47%
Language Arts & Disciplines	0.14%	0.10%	-31.35%	0.13%	0.10%	-26.13%	0.14%	0.07%	-49.70%
Law	0.07%	0.03%	-56.64%	0.06%	0.03%	-44.24%	0.05%	0.03%	-41.54%

	2013			2014			2015		
Subject	Baseline	Holiday Season	Percent Change	Baseline	Holiday Season	Percent Change	Baseline	Holiday Season	Percent Change
Literary Collections	0.05%	0.05%	-3.22%	0.05%	0.07%	36.05%	0.07%	0.08%	11.36%
Literary Criticism	0.06%	0.06%	3.78%	0.06%	0.06%	-6.96%	0.06%	0.06%	-4.79%
Mathematics	0.10%	0.06%	-42.07%	0.12%	0.06%	-49.22%	0.11%	0.05%	-54.45%
Medical	0.25%	0.12%	-52.62%	0.23%	0.13%	-42.54%	0.33%	0.14%	-55.68%
Music	0.23%	0.35%	52.08%	0.22%	0.36%	65.49%	0.19%	0.30%	55.54%
Nature	0.44%	0.44%	1.18%	0.36%	0.50%	41.64%	0.31%	0.40%	28.51%
Performing Arts	0.17%	0.49%	189.47%	0.16%	0.50%	215.06%	0.16%	0.36%	123.00%
Pets	0.28%	0.44%	60.57%	0.21%	0.47%	120.42%	0.21%	0.30%	45.35%
Philosophy	0.22%	0.17%	-24.01%	0.23%	0.16%	-31.67%	0.20%	0.16%	-21.49%
Photography	0.24%	0.69%	182.18%	0.30%	0.47%	58.38%	0.27%	0.65%	144.87%
Poetry	0.17%	0.14%	-16.05%	0.17%	0.18%	6.64%	0.19%	0.20%	1.93%
Political Science	0.31%	0.31%	-1.83%	0.28%	0.35%	26.24%	0.33%	0.28%	-14.04%
Psychology	0.67%	0.88%	31.36%	0.64%	0.43%	-32.83%	0.67%	0.42%	-37.23%
Reference	0.73%	1.27%	72.26%	0.70%	1.33%	89.07%	0.65%	0.98%	50.46%
Religion	1.40%	0.96%	-31.43%	1.18%	0.89%	-24.28%	0.95%	0.81%	-14.91%
Science	0.50%	0.48%	-3.76%	0.51%	1.16%	129.14%	0.57%	0.68%	18.90%
Self-Help	2.00%	1.97%	-1.75%	2.01%	1.78%	-11.25%	2.06%	1.96%	-4.89%
Social Science	0.43%	0.43%	1.35%	0.44%	0.41%	-7.24%	0.49%	0.37%	-24.58%
Sports & Recreation	0.74%	1.85%	151.87%	0.78%	1.81%	131.45%	0.68%	1.71%	149.82%
Study Aids	0.20%	0.08%	-56.70%	0.21%	0.09%	-57.91%	0.21%	0.08%	-60.94%
Technology & Engineering	0.07%	0.05%	-27.15%	0.08%	0.07%	-11.55%	0.08%	0.07%	-17.83%
Transportation	0.09%	0.08%	-10.98%	0.07%	0.09%	25.91%	0.06%	0.09%	53.90%
Travel	1.59%	1.25%	-21.38%	1.43%	1.15%	-19.59%	1.41%	1.07%	-23.81%
True Crime	0.30%	0.21%	-28.99%	0.24%	0.31%	27.55%	0.26%	0.20%	-23.78%



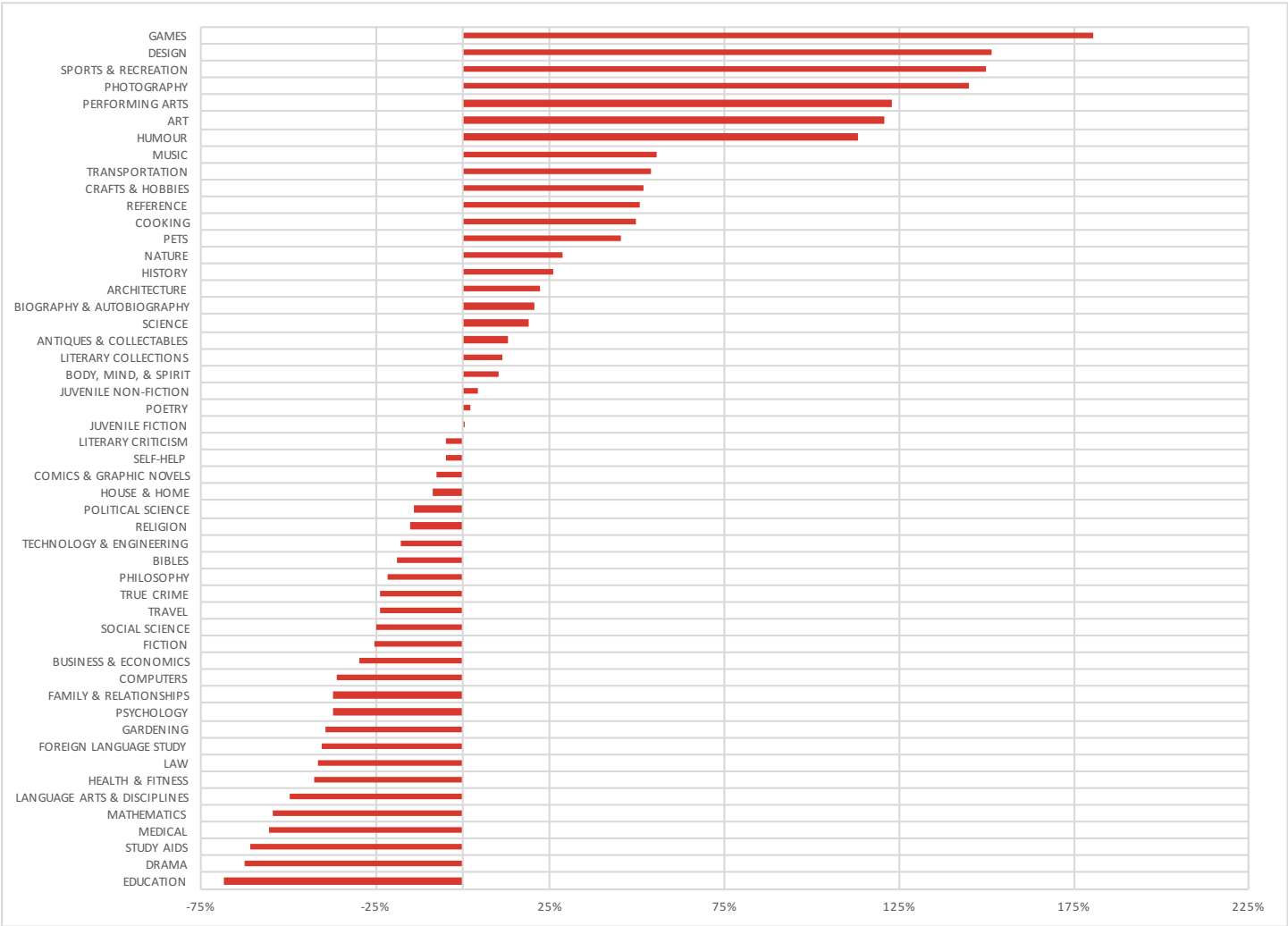
Market Share Percent Change

The graph on the following page illustrates the market share percent change for 2015, comparing the market share from the holiday season (six-week holiday season ending the last week of December) to the baseline.

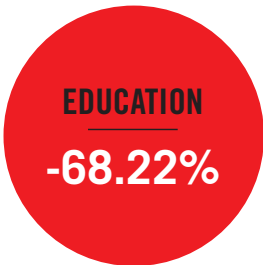
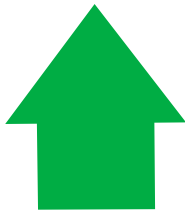
To increase our understanding of holiday season trends, we selected eight subject categories for closer analysis. Are these categories dominated by one title or are sales spread evenly? Is there a specific title we see each year? What effect can an unusual blockbuster have on market share? Each of the categories below will be analyzed in detail to help answer these questions.

- **Biography & Autobiography:** While this category has consistently experienced a positive holiday shift, this shift has declined in growth, from 137% in 2013 to 20% in 2015.
- **Comics & Graphic Novels:** In the last three years, this category has experienced an increasingly negative holiday shift.
- **Cooking:** In 2013 and 2014, this category saw an increase in market share over the holiday season.
- **Fiction:** Year-over-year, this category sees a consistently negative holiday shift.
- **Games:** In the past three years, this category has seen large increases in market share over the holiday season, with the largest of these increases observed in 2015.
- **Humour:** This category experiences consistently positive holiday shifts year-over-year.
- **Juvenile Fiction (includes YA Fiction):** This category has experienced fluctuating holiday shifts in the past three years.
- **Juvenile Non-Fiction (includes YA Non-Fiction):** After seeing a negative holiday shift in 2013, this category has experienced a positive holiday shift in the past two years.

MARKET SHARE PERCENT CHANGE FOR 2015



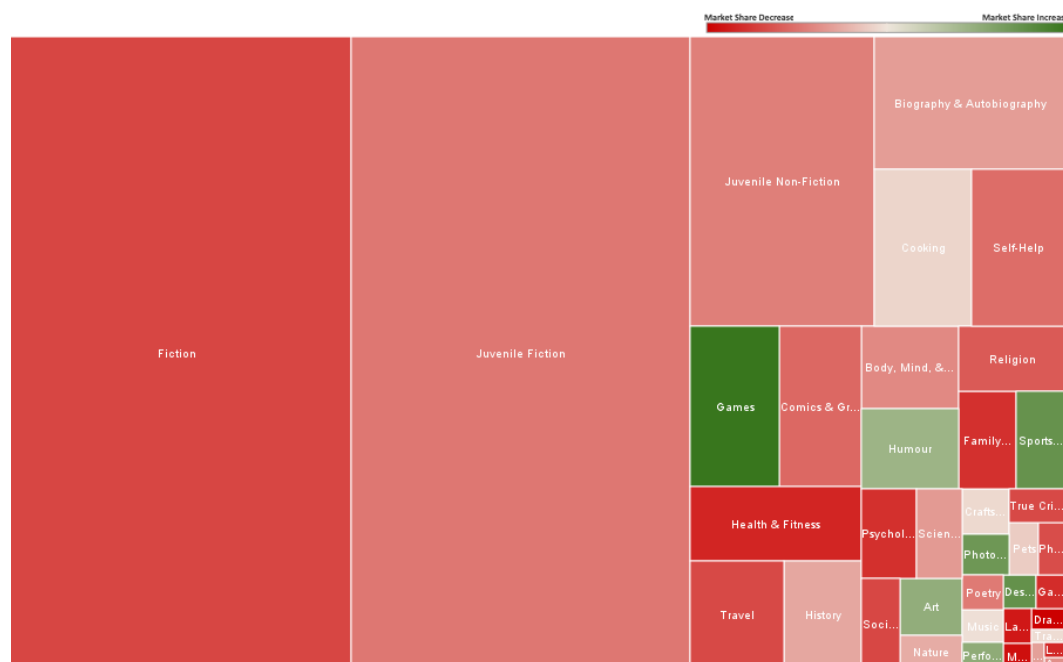
LARGEST
CATEGORY
INCREASES



LARGEST
CATEGORY
DECREASES

Market Share Representation – 2015

Although subject categories may undergo substantial increases or decreases in market share over the holiday season relative to their baselines, these changes may not impact the actual size of the overall market share of that category for the year. In the graph below, the size of each rectangle represents the market share percentage for each subject category, while the colour and saturation represent its holiday shift—red indicating a negative change, green for positive, and higher percentage shifts expressed by higher saturation.



As we observe from the same eight categories:

- Biography & Autobiography:** The baseline market share for this category has been gradually increasing year-over-year while its holiday market share has been decreasing, resulting in a positive yet decreasing holiday shift. In 2015, the baseline market share was 3.4%, increasing to 4.2% during the holiday season.

- **Comics & Graphic Novels:** While the Comics & Graphic Novels category has experienced a yearly increase of 0.2% in baseline market share, this category does not hold its market share during the holiday season. In 2015, it occupied a 1.8% baseline market share that decreased to 1.6% during the holiday season.
- **Cooking:** Like an evenly layered lasagna, the baseline market share for this category has been staying fairly consistent over the last three years. In both 2014 and 2015, this category experienced increases in market share during the holiday season; last year, it experienced a 49.8% increase from a baseline of 2.1% to a holiday market share of 3.1%.
- **Fiction:** Fiction consistently holds the largest portion of the baseline market share year-over-year, yet it also consistently decreases in market share over the holiday season. In 2015, the Fiction market share shifted from a baseline of 30.3% to 22.6% during the holiday season.
- **Games:** Move over Humour, because the Games category has come out on top. With the addition of colouring books to this category, Games saw the greatest increase in market share over the 2015 holiday season. Games represented 1.9% of the market during the first three quarters of 2015, increasing to an eye-opening 5.4% during the holiday season.
- **Humour:** In 2007 and 2008, Humour reigned as top dog, i.e., the category with the greatest increase in market share over the holiday season. This is no longer the case: in 2015, this category experienced an increase from a baseline market share of 1.0% to a holiday market share of 2.2%, but this 113.4% holiday shift was not enough to earn the top spot.
- **Juvenile Fiction (includes YA Fiction):** Juvenile Fiction consistently holds the second largest market share throughout the year, coming in behind Fiction. In 2015, this category experienced a miniscule increase, from 29.4% during the first three quarters of the year to 29.6% during the holiday season.
- **Juvenile Non-Fiction (includes YA Non-Fiction):** Compared to its fiction counterpart, Juvenile Non-Fiction holds a significantly smaller market share throughout the year. In 2015, this category experienced a 7.3% baseline market share, with an increase to 7.6% over the holiday season.



Holiday Shift – A Closer Look

To gain further understanding of the holiday shifts we have observed, the next pages will take a closer look at the following categories:

- Biography & Autobiography
- Comics & Graphic Novels
- Cooking
- Fiction
- Games
- Humour
- Juvenile Fiction
- Juvenile Non-Fiction

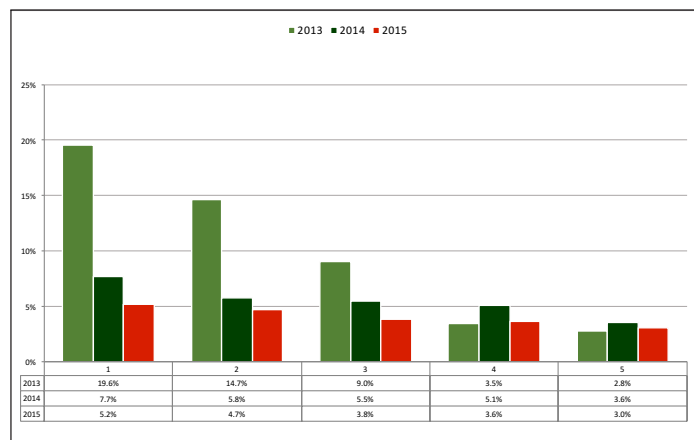
The top five titles in each category during the six-week holiday season will be examined to determine if there are trends that can be seen year-over-year, whether blockbusters play an impact in market share shift, and if consumer preference within categories has changed over the past three years.

Note: In the following tables and graphs, the category share figures represent the category share percentage that the associated title holds within its subject category.

Biography & Autobiography

Biography & Autobiography has experienced a gradually increasing baseline market share over the past three years. At the same time, the holiday market share has decreased year-over-year, resulting in a positive but declining holiday shift.

This category experienced its highest holiday shift of 137.1% in 2013, as the baseline market share of 2.7% increased to 6.4% during the holiday season. This upward shift may have been influenced by three blockbuster titles that reigned that year: *An Astronaut's Guide to Life on Earth*, *Orr*, and *I Am Malala*. These three titles saw category shares greater than the top-ranked titles in both 2014 and 2015. Chris Hadfield's memoir had such a lasting effect that its hardcover edition went on to make the top five list a full year later, in 2014.



2013 Holiday Shift – Biography & Autobiography

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	An Astronaut's Guide to Life on Earth	Hadfield, Chris	9780345812704	HT	29/10/2013	\$32.00	19.6%
2	Orr	Orr, Bobby	9780670066971	HT	15/10/2013	\$32.00	14.7%
3	I Am Malala	Yousafzai, Malala	9780316322409	HT	08/10/2013	\$29.00	9.0%
4	Si-Cology 1	Robertson, Si	9781476745374	HT	03/09/2013	\$26.99	3.5%
5	A House in the Sky	Lindhout, Amanda; Corbett, Sara	9781451651690	HT	03/09/2013	\$29.99	2.8%

2014 Holiday Shift – Biography & Autobiography

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	Mr. Hockey	Howe, Gordie	9780670068722	HT	14/10/2014	\$32.00	7.7%
2	Yes Please	Poehler, Amy	9781443424523	HT	28/10/2014	\$32.99	5.8%
3	Unbroken	Hillenbrand, Laura	9780812987119	TP	04/11/2014	\$19.00	5.5%
4	Wild	Strayed, Cheryl	9781101873441	TP	18/11/2014	\$18.95	5.1%
5	An Astronaut's Guide to Life on Earth	Hadfield, Chris	9780345812704	HT	29/10/2013	\$32.00	3.6%

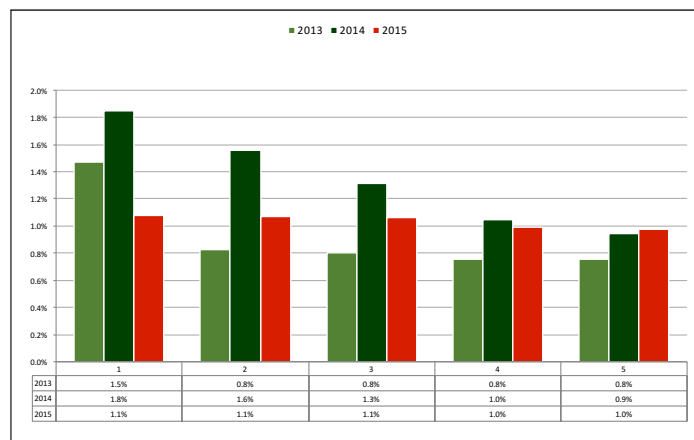
2015 Holiday Shift – Biography & Autobiography

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	Shift Work	Domi, Tie	9781476782508	HT	02/11/2015	\$32.00	5.2%
2	My Secret Sister	Smith, Jenny Lee; Edwards, Helen	9781447228875	TP	14/03/2013	\$15.99	4.7%
3	Quinn	Robson, Dan	9780670069910	HT	03/11/2015	\$32.00	3.8%
4	Furiously Happy	Lawson, Jenny	9781250077004	HT	22/09/2015	\$31.50	3.6%
5	Open Heart, Open Mind	Hughes, Clara	9781476756981	HT	08/09/2015	\$32.00	3.0%

Comics & Graphic Novels

Comics & Graphic Novels' baseline market share has experienced small increases over the past three years (1.4% in 2013, 1.6% in 2014, and 1.8% in 2015). The opposite has happened to this category's holiday shift, which has decreased in the past three years, from -2.8% in 2013, to -4.7% in 2014, and -7.5% in 2015.

This decrease in holiday shift can be partially attributed to the increasing baseline. While the shifts in baseline market share may appear to be small, their effects are strongly felt. This can be observed in 2014: although the top three titles that year occupied the highest amounts of category share compared to similarly ranked titles in 2013 and 2015, this category still experienced the greatest decrease in holiday shift due to simultaneously undergoing the greatest increase in baseline market share of 2014.



2013 Holiday Shift – Comics & Graphic Novels

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	Attack on Titan 1	Isayama, Hajime	9781612620244	TP	19/06/2012	\$11.99	1.5%
2	Attack on Titan 2	Isayama, Hajime	9781612620251	TP	11/09/2012	\$11.99	0.8%
3	Death of the Family	Snyder, Scott	9781401242343	HT	05/11/2013	\$27.99	0.8%
4	Attack on Titan 9	Isayama, Hajime	9781612625485	TP	26/11/2013	\$11.99	0.8%
5	The Joker	Snyder, Scott	9781401242350	HT	22/10/2013	\$35.00	0.8%

2014 Holiday Shift – Comics & Graphic Novels

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	A Visual History	Wallace, Daniel; Cowsill, Alan; Irvine, Alex	9781465433848	HT	29/09/2014	\$55.00	1.8%
2	Seconds	O'Malley, Bryan Lee	9780307363060	HT	15/07/2014	\$25.00	1.6%
3	Marvel Year by Year	Sanderson, Peter	9781465414434	HT	19/08/2013	\$50.00	1.3%
4	Death of the Family	Snyder, Scott	9781401249274	TP	30/09/2014	\$47.99	1.0%
5	Marvel Encyclopedia	Dorling Kindersley Publishing Staff	9781465415936	HT	18/03/2014	\$42.00	0.9%

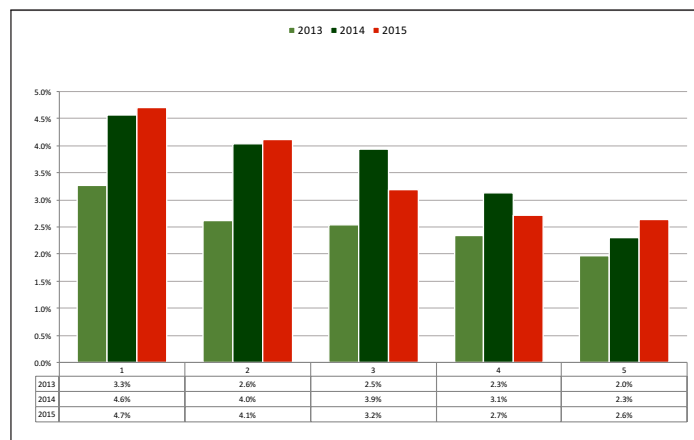
2015 Holiday Shift – Comics & Graphic Novels

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	Darth Vader	Gillen, Kieron	9780785192558	TP	20/10/2015	\$21.99	1.1%
2	Step Aside, Pops	Beaton, Kate	9781770462083	HT	15/09/2015	\$24.95	1.1%
3	Tokyo Ghoul, Vol. 1	Ishida, Sui	9781421580364	TP	16/06/2015	\$14.99	1.1%
4	Marvel Comics: 75 Years of Cover Art	Dorling Kindersley Publishing Staff	9781465420404	HT	18/08/2014	\$52.00	1.0%
5	Tokyo Ghoul, Vol. 4	Ishida, Sui	9781421580395	TP	15/12/2015	\$14.99	1.0%

Cooking

Cooking's baseline market share has been decreasing over the last three years, from 2.8% in 2013, to 2.4% in 2014, to 2.1% in 2015. Meanwhile, this category has experienced positive holiday shifts, with growths of 10.4% in 2013, 50.8% in 2014, and 49.8% in 2015.

Blockbuster titles, in conjunction with decreases in baseline market share, have contributed to the large holiday shift increases in 2014 and 2015. The top two titles in each of these years—*Make It Ahead*, *Thug Kitchen*, *Everyday Super Food*, and *The Oh She Glows Cookbook*—occupied at least a full percent more of category share than the top two titles in 2013. All of the top five titles in 2013 occupied the least amount of category share when compared to similarly ranked titles in 2014 and 2015.



2013 Holiday Shift – Cooking

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	The Looneyspoons Collection	Podleski, Janet; Podleski, Greta	9780968063156	TP	01/10/2011	\$34.95	3.3%
2	15 Minute Meals	Oliver, Jamie	9781443429252	HT	08/10/2013	\$37.99	2.6%
3	Back to Basics	Smith, Michael	9780143184102	TP	03/09/2013	\$32.00	2.5%
4	Miss Jay's Duck Commander Kitchen	Robertson, Kay	9781476745121	TP	05/11/2013	\$26.99	2.3%
5	Save with Jamie	Oliver, Jamie	9781443429238	HT	08/10/2013	\$37.99	2.0%

2014 Holiday Shift – Cooking

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	Make It Ahead	Garten, Ina	9780307464880	HT	28/10/2014	\$41.00	4.6%
2	Thug Kitchen	Thug Kitchen Staff	9781770894655	HT	07/10/2014	\$32.95	4.0%
3	The Oh She Glows Cookbook	Liddon, Angela	9780143187226	TP	04/03/2014	\$32.00	3.9%
4	Jamie's Comfort Food	Oliver, Jamie	9781443430432	HT	23/09/2014	\$37.99	3.1%
5	Plenty More	Ottolenghi, Yotam	9780449016343	HT	14/10/2014	\$39.95	2.3%

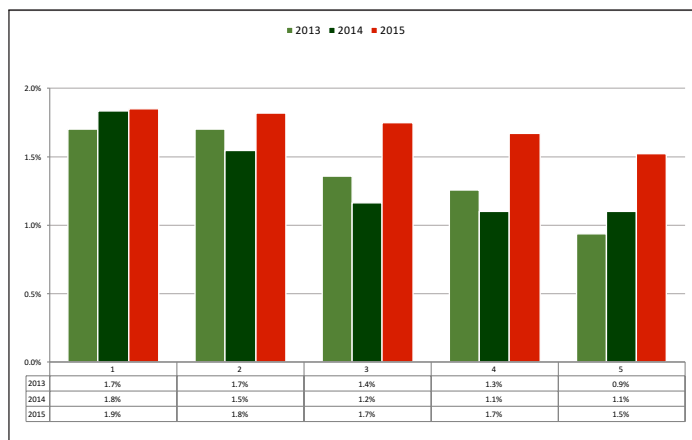
2015 Holiday Shift – Cooking

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	Everyday Super Food	Oliver, Jamie	9781443430456	HT	20/10/2015	\$37.99	4.7%
2	The Oh She Glows Cookbook	Liddon, Angela	9780143187226	TP	04/03/2014	\$32.00	4.1%
3	Thug Kitchen	Thug Kitchen Staff	9781770894655	HT	07/10/2014	\$32.95	3.2%
4	The Pioneer Woman Cooks - Dinnertime	Drummond, Ree	9780062225245	HT	20/10/2015	\$36.99	2.7%
5	Thug Kitchen Party Grub Guide	Thug Kitchen Staff; Davis, Michelle; Holloway, Matthew	9781443445634	HT	13/10/2015	\$29.99	2.6%

Fiction

Fiction maintains consistent market shares year-over-year. In the past three years, the baseline market share sat at an average of 31.5% (33.7% in 2013, 30.2% in 2014, and 30.3% in 2015) and then dropped to around 23% during the holiday season (24.7% in 2013, 23.1% in 2014, and 22.6% in 2015).

While the top title in 2015, *Rogue Lawyer*, held a similar category share as the top titles in 2013 and 2014, the other four titles in 2015 occupied higher amounts of category share than their similarly ranked counterparts in the previous two years. Although published in 2014, Anthony Doerr's *All the Light We Cannot See* moved up three spots from fifth position in 2014 to second position in 2015. Sales for this book may have been influenced by publicity from awards, as it won the 2015 Pulitzer Prize for Fiction and the 2015 Andrew Carnegie Medal for Excellence in Fiction.



2013 Holiday Shift – Fiction

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	The First Phone Call from Heaven	Albom, Mitch	9780062294371	HT	12/11/2013	\$27.99	1.7%
2	Sycamore Row	Grisham, John	9780385537131	HT	22/10/2013	\$32.00	1.7%
3	Doctor Sleep	King, Stephen	9781476727653	HT	24/09/2013	\$34.99	1.4%
4	Dark Witch	Roberts, Nora	9780425259856	TP	29/10/2013	\$18.00	1.3%
5	A Dance with Dragons	Martin, George R. R.	9780553582017	MM	29/10/2013	\$11.99	0.9%

2014 Holiday Shift – Fiction

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	Gray Mountain	Grisham, John	9780385537148	HT	21/10/2014	\$34.00	1.8%
2	Revival	King, Stephen	9781476770383	HT	11/11/2014	\$36.00	1.5%
3	Captivated by You	Day, Sylvia	9780425273869	TP	18/11/2014	\$18.00	1.2%
4	Gone Girl	Flynn, Gillian	9780553418361	TP	26/08/2014	\$18.00	1.1%
5	All the Light We Cannot See	Doerr, Anthony	9781501104565	TP	04/11/2014	\$19.99	1.1%

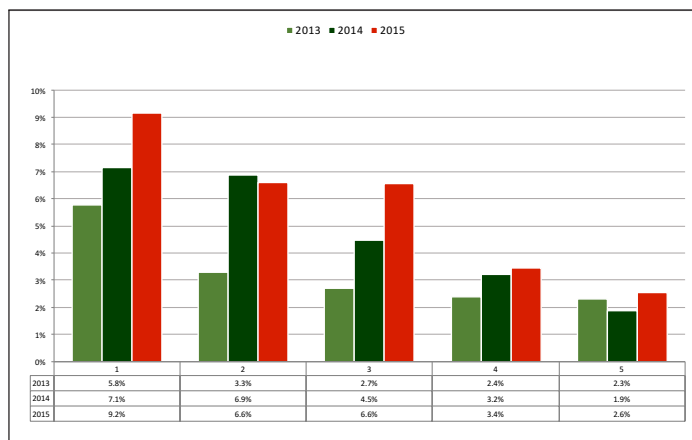
2015 Holiday Shift – Fiction

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	Rogue Lawyer	Grisham, John	9780385539432	HT	20/10/2015	\$35.99	1.9%
2	All the Light We Cannot See	Doerr, Anthony	9781501104565	TP	04/11/2014	\$19.99	1.8%
3	Fifteen Dogs	Alexis, André	9781552453056	TP	01/04/2015	\$17.95	1.7%
4	The Girl on the Train	Hawkins, Paula	9780385682312	TP	06/01/2015	\$24.95	1.7%
5	The Bazaar of Bad Dreams	King, Stephen	9781501111679	HT	03/11/2015	\$36.99	1.5%

Games

In the past three years, Games has seen large increases in both baseline market share and holiday shift. Baseline market share has increased from 0.5% in 2013, to 0.6% in 2014, to 1.9% in 2015, while holiday market share has increased from 1.0% in 2013, to 1.1% in 2014, to a whopping 5.4% in 2015. This huge jump in 2015 results in a 180.4% upward shift, the greatest holiday shift increase of any category in 2015.

The cause for this jump? The colouring book craze. While no colouring books make the top-five lists for 2013 or 2014, all five titles on the 2015 list are adult colouring books (or colouring postcards, in the case of Millie Marotta's *Animal Kingdom Postcard Book*). Except for Marotta's *Animal Kingdom*, 2015's colouring books occupied more category share than similarly ranked titles in 2013 and 2014.



2013 Holiday Shift – Games

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	The Legend of Zelda	Himekawa, Akira; Aonuma, Eiji	9781616550417	HT	29/01/2013	\$45.99	5.8%
2	Skylanders Swap Force	Activision Staff; BradyGames Staff	9780744015140	TP	13/10/2013	\$19.99	3.3%
3	Go!Games Absolutely Addictive Sudoku	Immanuel, Anthony; Stickels, Terry	9781936140893	TP	01/02/2013	\$8.95	2.7%
4	Christmas Crosswords	Puzzle Society Staff	9781449434007	TP	22/10/2013	\$9.99	2.4%
5	Christmas Word Roundup Vol. 3	Puzzle Society Staff	9781449434014	TP	22/10/2013	\$9.99	2.3%

2014 Holiday Shift – Games

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	Guinness World Records 2015 Gamer's Edition	Guinness World Records Editors	9781908843661	TP	11/11/2014	\$16.99	7.1%
2	The Big Book of Building	Triumph Books Staff	9781629370286	HT	01/11/2014	\$19.95	6.9%
3	Mastering Minecraft	Brady Games Staff	9780744015669	TP	08/08/2014	\$15.99	4.5%
4	Dungeon Master's Guide	Wizards RPG Team	9780786965625	HT	09/12/2014	\$58.00	3.2%
5	Call of Duty	BradyGames Staff	9780744015652	HT	03/11/2014	\$37.99	1.9%

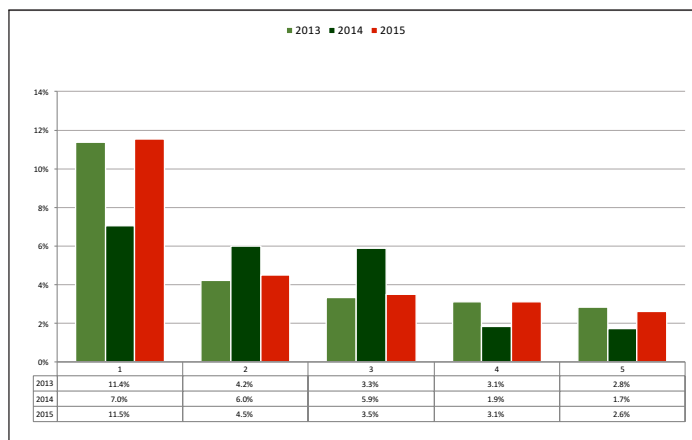
2015 Holiday Shift – Games

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	Enchanted Forest	Basford, Johanna	9781780674889	TP	17/02/2015	\$22.50	9.2%
2	Animal Kingdom	Marotta, Millie	9781454709107	TP	23/09/2014	\$16.95	6.6%
3	Tropical World	Marotta, Millie	9781454709138	TP	08/09/2015	\$16.95	6.6%
4	Animorphia	Rosanes, Kerby	9780147518361	TP	13/10/2015	\$19.00	3.4%
5	Millie Marotta's Animal Kingdom (Postcard Book)	Marotta, Millie	9781454709350	TP	20/10/2015	\$11.95	2.6%

Humour

Year-over-year, Humour experiences an upward shift in market share over the holiday season, resulting in holiday shifts of 147.8% in 2013, 165.2% in 2014, and 113.4% in 2015. A decrease in baseline market share in 2014 (from 1.1% in 2013 to 0.9% in 2014) resulted in the exceptionally large holiday shift increase that year.

While these holiday shifts are likely a result of gift purchases, in recent years the top spots for this category have been claimed by celebrity memoirs. Even the top title of 2013, Ron Burgundy's *Let Me Off at the Top!* is a parody of this genre. Unlike the previous two years, all five of the top 2015 titles are authored by celebrities (either actors or YouTube personalities). Interestingly, Mindy Kaling's *Is Everyone Hanging Out Without Me?* manages to retain the same second-place position two years in a row, although it occupies 1.5% less in category share in 2015.



2013 Holiday Shift – Humour

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	Let Me Off at the Top!	Burgundy, Ron	9780385682183	HT	19/11/2013	\$27.00	11.4%
2	Hyperbole and a Half	Brosh, Allie	9781451666175	TP	29/10/2013	\$23.99	4.2%
3	How to Tell if Your Cat is Plotting to Kill You	Oatmeal Staff; Inman, Matthew	9781449410247	TP	09/10/2012	\$16.99	3.3%
4	You Might Be From Nova Scotia If...	De Adder, Michael	9781927097397	TP	15/09/2013	\$16.95	3.1%
5	Uncle John's Bathroom Reader Weird Canada	Bathroom Readers' Institute Staff	9781607108917	TP	13/09/2013	\$27.95	2.8%

2014 Holiday Shift – Humour

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	Not That Kind of Girl	Dunham, Lena	9780385680677	HT	30/09/2014	\$32.00	7.0%
2	Is Everyone Hanging Out Without Me?	Kaling, Mindy	9780307886279	TP	18/09/2012	\$17.00	6.0%
3	What If?	Munroe, Randall	9780544272996	HT	02/09/2014	\$33.95	5.9%
4	You Have to F**king Eat	Mansbach, Adam	9781617753787	HT	12/11/2014	\$21.95	1.9%
5	The Complete Calvin and Hobbes	Watterson, Bill	9781449433253	TP	13/11/2012	\$100.00	1.7%

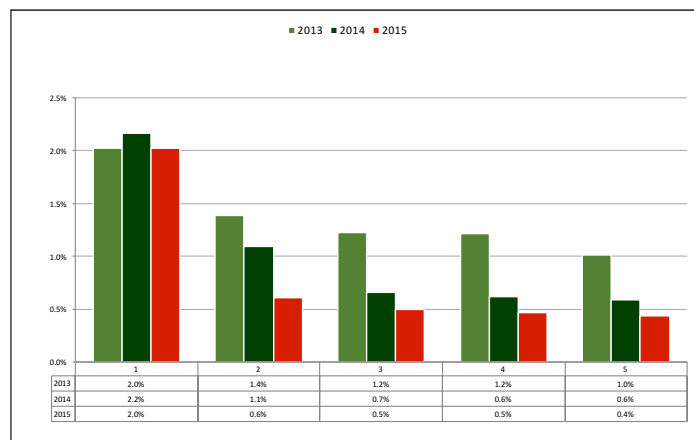
2015 Holiday Shift – Humour

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	Why Not Me?	Kaling, Mindy	9780804138147	HT	15/09/2015	\$32.00	11.5%
2	Is Everyone Hanging Out Without Me?	Kaling, Mindy	9780307886279	TP	18/09/2012	\$17.00	4.5%
3	Binge	Oakley, Tyler	9781501117695	HT	20/10/2015	\$32.00	3.5%
4	Modern Romance	Ansari, Aziz; Klinenberg, Eric	9781594206276	HT	16/06/2015	\$33.00	3.1%
5	Self-Help	Sings, Miranda	9781501117947	HT	21/07/2015	\$29.99	2.6%

Juvenile Fiction (includes YA)

Juvenile Fiction's market share during both the baseline and holiday season has had its ups and downs in the last three years. This category's baseline market share shifted from 26.6% in 2013, to 30.4% in 2014, to 29.4% in 2015. The holiday season market share changed from 28.4% in 2013, to 30.2% in 2014, to 29.6% in 2015.

One title consistently comes out on top in this category: Jeff Kinney's *Wimpy Kids* series, which occupied all of the top three spots from 2013 to 2015 with an average category share of 2.0%. Another constant in this category is *The Elf on the Shelf*, as more mixed-media products begin to populate these top-five lists, likely a result of gift purchases during the holiday season.



2013 Holiday Shift – Juvenile Fiction (YA Included)

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	Hard Luck	Kinney, Jeff	9781419711329	HT	05/11/2013	\$16.95	2.0%
2	The Elf on the Shelf - A Christmas Tradition	Bell, Chanda; Aebersold, Carol	9780976990703	MMP*	16/10/2009	\$39.28	1.4%
3	Allegiant	Roth, Veronica	9780062024060	HT	22/10/2013	\$21.99	1.2%
4	The Hunger Games Trilogy Boxed Set	Collins, Suzanne	9780545626385	POS materials	01/10/2013	\$40.00	1.2%
5	Divergent	Roth, Veronica	9780062024039	TP	30/01/2012	\$11.99	1.0%

2014 Holiday Shift – Juvenile Fiction (YA included)

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	The Long Haul	Kinney, Jeff	9781419711893	HT	04/11/2014	\$16.95	2.2%
2	The Elf on the Shelf - A Christmas Tradition	Bell, Chanda; Aebersold, Carol	9780976990703	MMP*	16/10/2009	\$39.28	1.1%
3	Hide and Hug Olaf	Lewis, Kevin	9781484721506	HT	28/10/2014	\$26.99	0.7%
4	The Elf on the Shelf - Girl	Bell, Chanda; Aebersold, Carol	9780976990734	Other book format	30/09/2012	\$39.99	0.6%
5	The Bane Chronicles	Clare, Cassandra	9781442495999	HT	11/11/2014	\$24.99	0.6%

2015 Holiday Shift – Juvenile Fiction (YA Included)

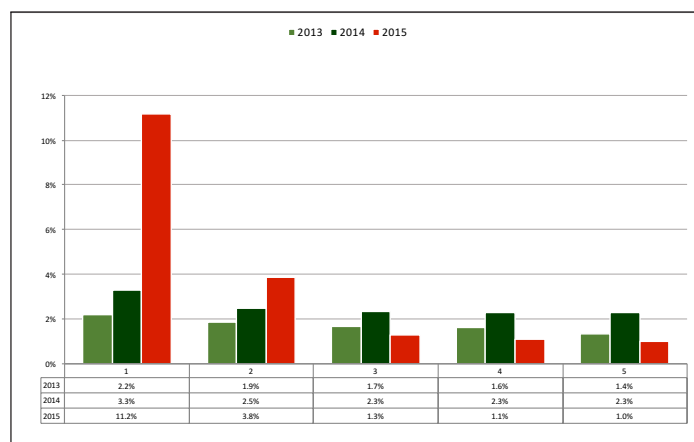
Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	Old School	Kinney, Jeff	9781419717017	HT	03/11/2015	\$16.95	2.0%
2	Tales from a Not-So-Perfect Pet Sitter	Russell, Rachel Renée	9781481457040	HT	20/10/2015	\$17.99	0.6%
3	The Elf on the Shelf - A Christmas Tradition	Bell Chanda; Aebersold, Carol	9780976990703	MMP*	16/10/2009	\$39.28	0.5%
4	How the Grinch Stole Christmas!	Seuss, Dr.	9780394800790	HT	12/10/1957	\$21.99	0.5%
5	How the Grinch Stole Christmas! Book and Grinch	Seuss, Dr.	9780553524451	MMP*	22/09/2015	\$34.99	0.4%

*Mixed media product

Juvenile Non-Fiction (includes YA)

Juvenile Non-Fiction's market share during the baseline period has increased slightly over the past three years (6.5% in 2013, 7.0% in 2014, and 7.3% in 2015). After experiencing a holiday shift decrease of 12.2% in 2013, upward shifts of 2.1% and 4.4% were experienced in 2014 and 2015.

The top-five list for 2014 was unusual, as it was dominated by Minecraft Handbooks, with the exception of one spot. Interestingly, *Minecraft Handbook 1* holds the same spot in 2013 and 2014, occupying more category share in the latter year despite the increase in holiday market share and positive holiday shift that year. The effects of the colouring book craze can also be observed in 2015, with *Lost Ocean* dominating in category share compared to all the other titles for this category in the past three years.



2013 Holiday Shift – Juvenile Non-Fiction (YA Included)

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	Make Clay Charms	Nichols, Kaitlyn	9780545498562	MMP*	01/02/2013	\$26.99	2.2%
2	Friendship Bracelets	SpiceBox Products Ltd.	9781894722490	MMP*	01/01/2013	\$24.99	1.9%
3	Lego Play Book	Lipkowitz, Daniel; Farshtey, Greg	9781465414120	HT	27/08/2013	\$24.99	1.7%
4	Pom-Pom Puppies	Chorba, April	9780545561648	MMP*	01/08/2013	\$22.99	1.6%
5	Minecraft Handbook 1: The Beginner's Handbook	Mojang	9781405268394	HT	21/10/2013	\$7.99	1.4%

2014 Holiday Shift – Juvenile Non-Fiction (YA Included)

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	Minecraft Handbook 4: The Construction Handbook	Mojang	9781405268424	HT	09/04/2014	\$7.99	3.3%
2	Minecraft Handbook 3: The Combat Handbook	Mojang	9781405268417	HT	10/04/2014	\$7.99	2.5%
3	Minecraft Handbook 2: The Redstone Handbook	Mojang	9781405268400	HT	18/12/2013	\$7.99	2.3%
4	Disney Frozen: The Essential Collection	Dorling Kindersley Publishing Staff	9781465434470	HT	03/11/2014	\$19.99	2.3%
5	Minecraft Handbook 1: The Beginner's Handbook	Mojang	9781405268394	HT	21/10/2013	\$7.99	2.3%

2015 Holiday Shift – Juvenile Non-Fiction (YA Included)

Rank	Title	Contributor	ISBN	Format	Publication Date	List Price	Category Share
1	Lost Ocean	Basford, Johanna	9780143108993	TP	27/10/2015	\$22.95	11.2%
2	Harry Potter - The Colouring Book	Scholastic, Inc. Staff	9781338029994	TP	10/11/2015	\$21.99	3.8%
3	The Amazing Book Is Not on Fire	Howell, Dan; Lester, Phil	9781101939840	HT	13/10/2015	\$24.99	1.3%
4	National Geographic Kids Almanac 2016, Canadian Edition	National Geographic Kids	9781426319235	TP	12/05/2015	\$17.99	1.1%
5	Make Glitter Clay Charms	Klutz Editors	9780545858465	Kit	01/09/2015	\$26.99	1.0%

*Mixed media product

Conclusions

- We cannot predict the success of particular titles or categories, but several subject categories, such as Humour and Sports & Recreation, have been shown to consistently perform exceptionally well during the holiday season compared to the first three quarters of the year. With the addition of adult colouring books, Games is at the top of this list, experiencing a holiday shift of 76.3% in 2013, 90.5% in 2014, and 180.4% in 2015.
- Clear trends spanning 2013, 2014, and 2015 have emerged to help illustrate the big picture of the holiday market. However, the potential for runaway bestsellers can upset these trends, as observed with Chris Hadfield's memoir *An Astronaut's Guide to Life on Earth* during the 2013 holiday season, and Johanna Basford's *Lost Ocean* in 2015.
- Consistent holiday performance of categories is not necessarily driven by the same types of books every year, as observed with the recent shift towards celebrity-authored titles in the Humour category. While annuals and bestselling backlist can contribute to market share increases during the holiday period, category content can change dramatically without drastically affecting holiday market share increase.
- Holiday-themed non-traditional book products, such as mixed-media products, have shown success in occupying holiday season market share in certain subject categories.

Acknowledgements

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