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Consumer Attitudes Toward E-Book Reading

Tools of Change, New York, NY - February 15, 2012

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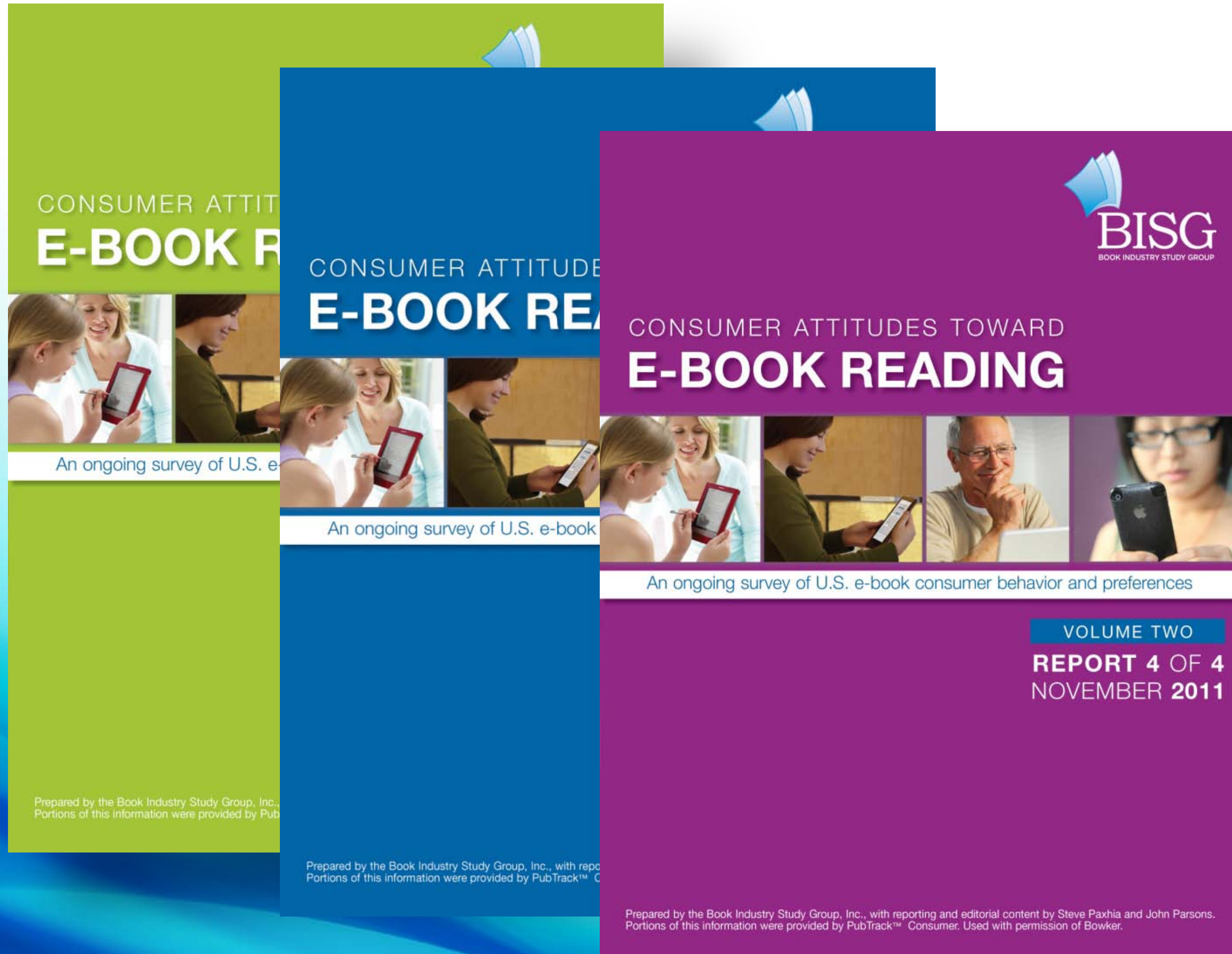
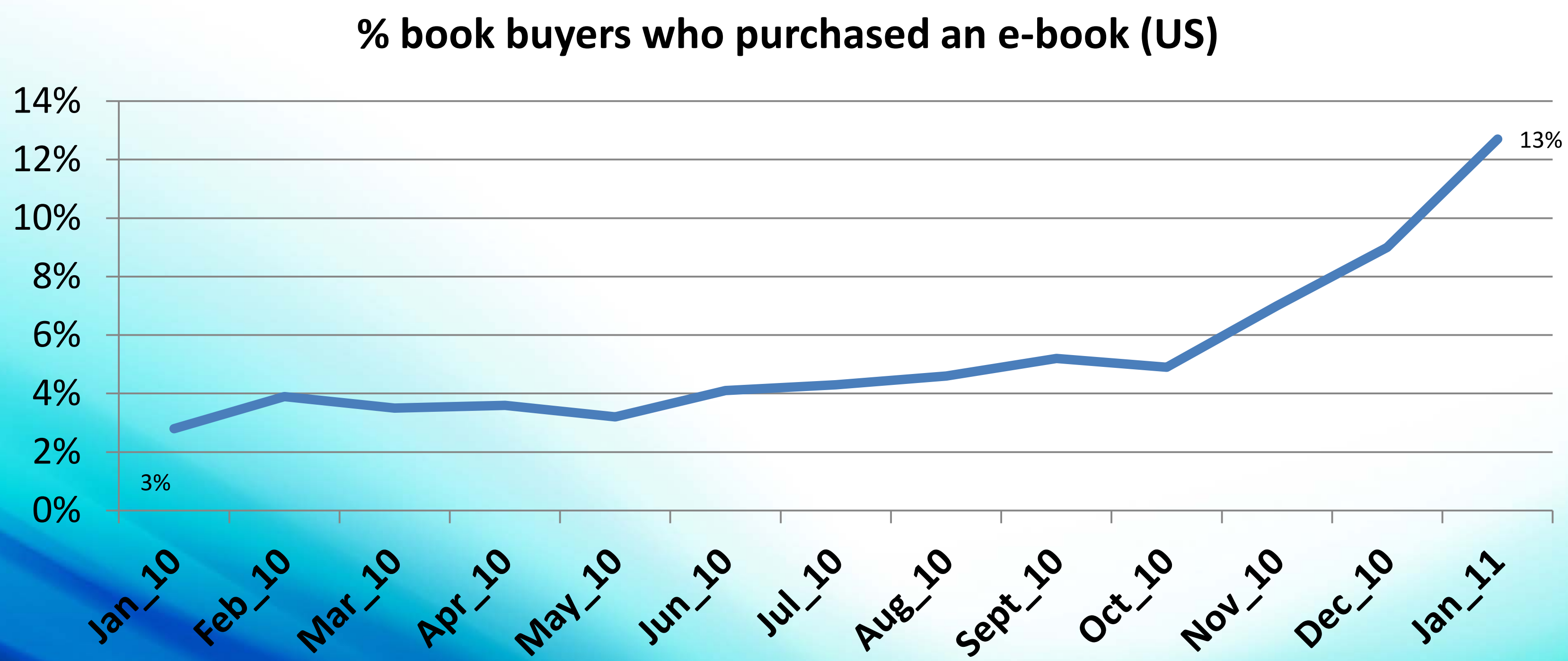


Rewind



% book buyers who purchased an e-book (US)
14%
12%
10%
8%
6%
4%
2%
0%
3%
13%
Jan_10
Feb_10
Mar_10
Apr_10
May_10
Jun_10
Jul_10
Aug_10
Sept_10
Oct_10
Nov_10
Dec_10
Jan_11

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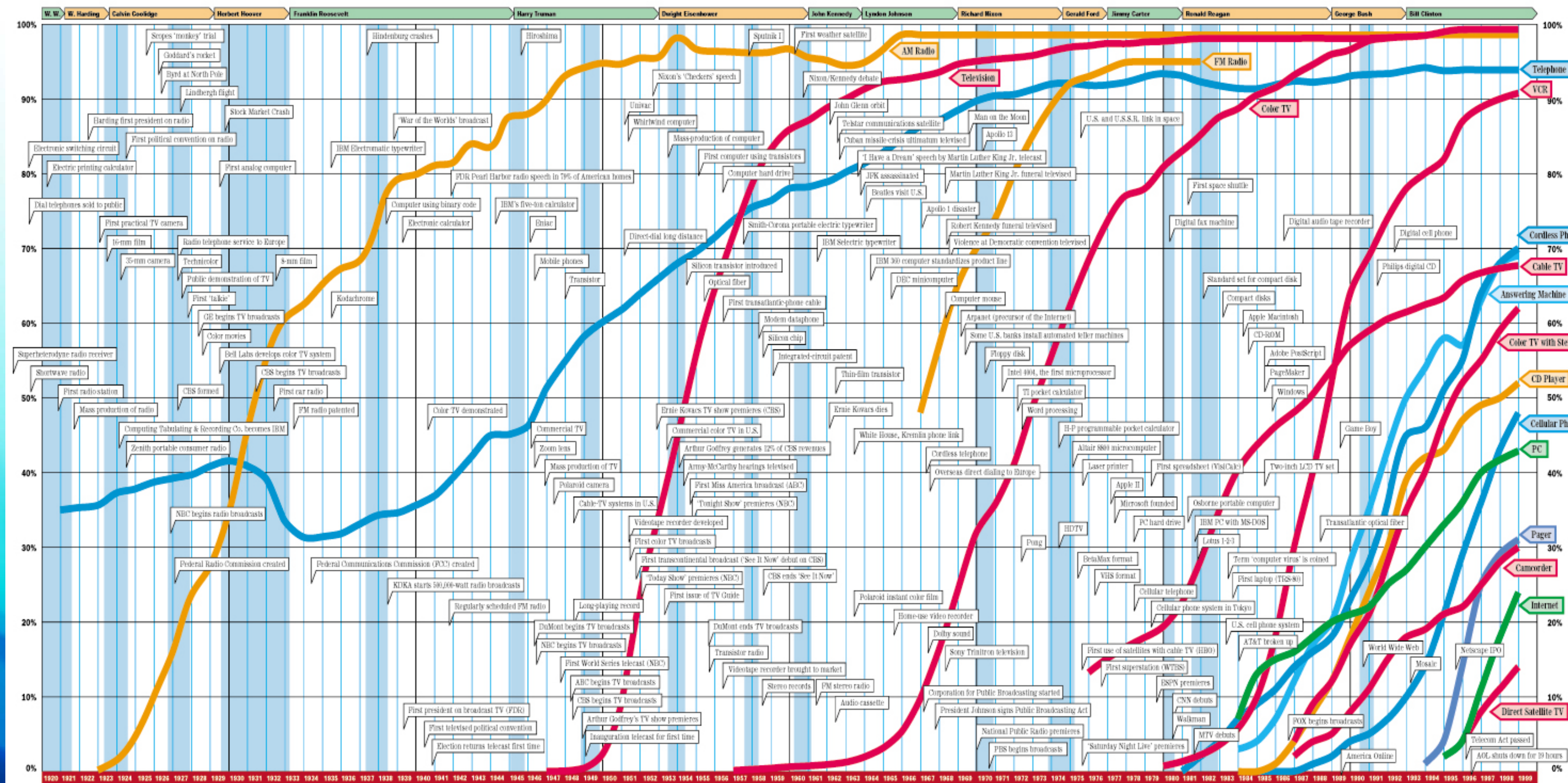
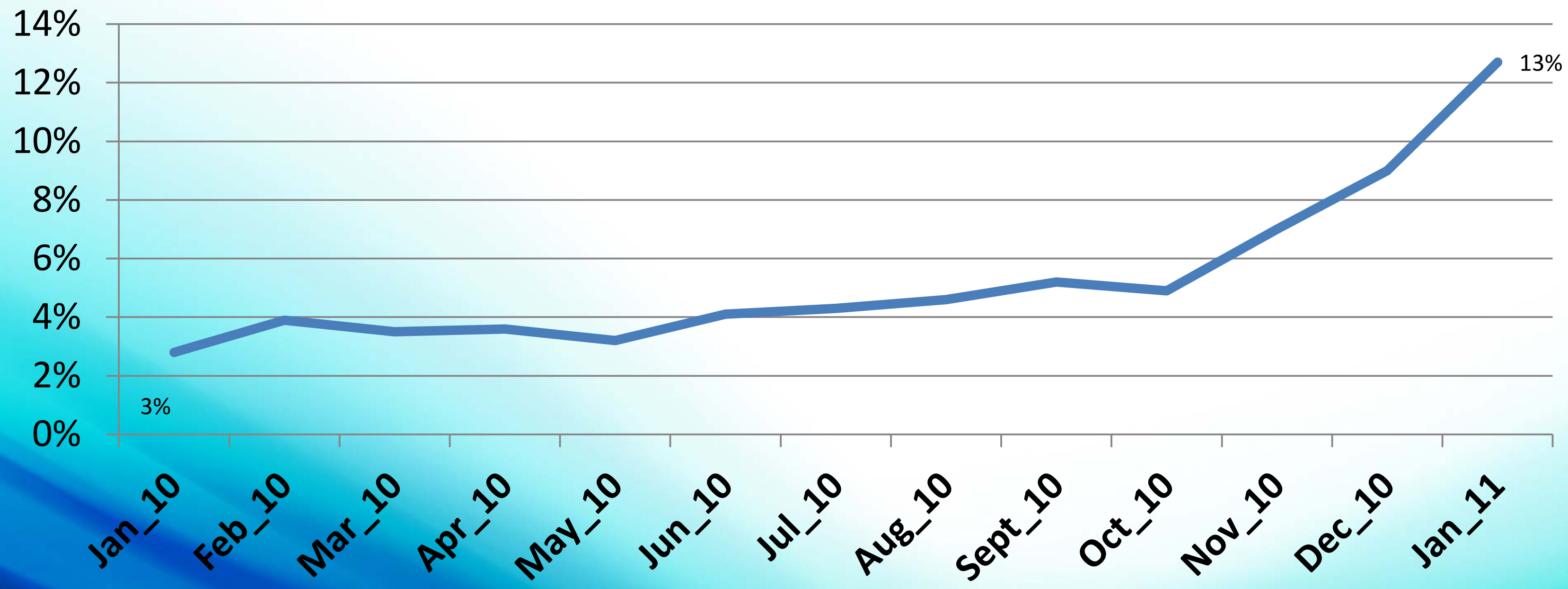


% book buyers who purchased an e-book (US)



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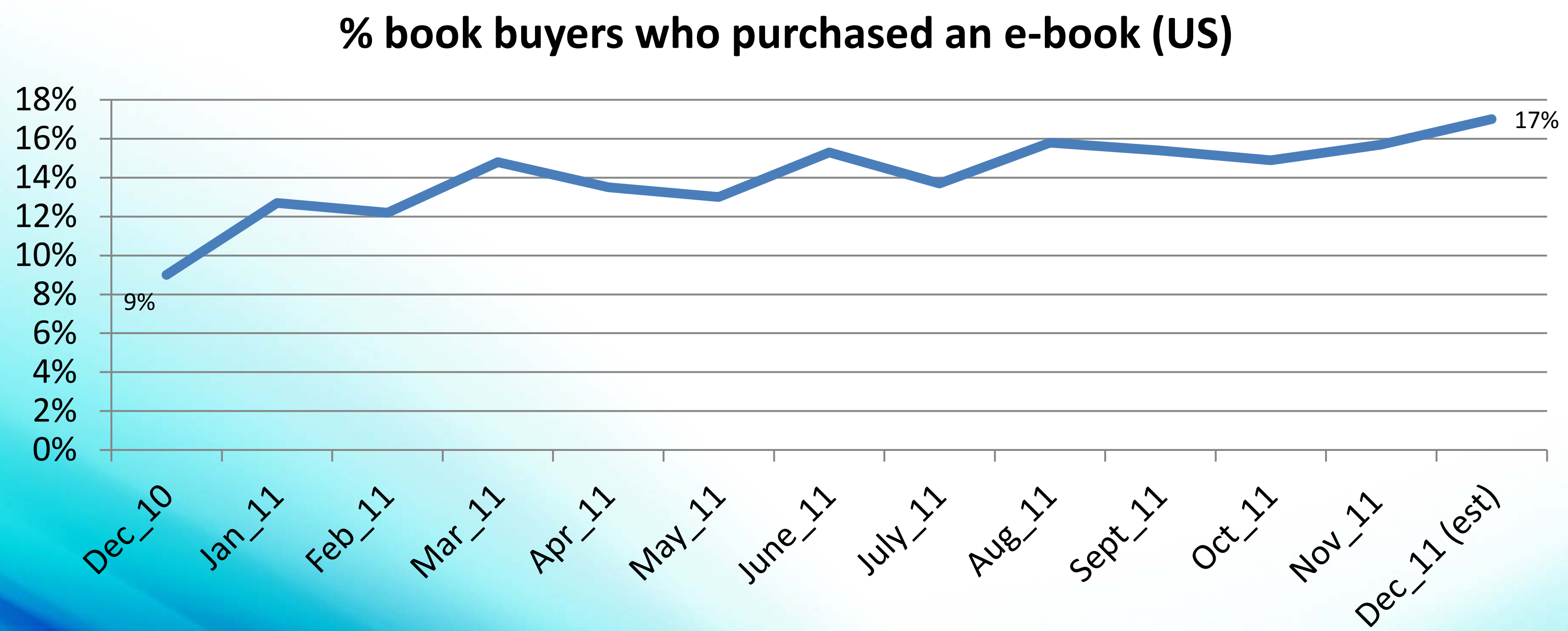

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Really?

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Yes, really. But...

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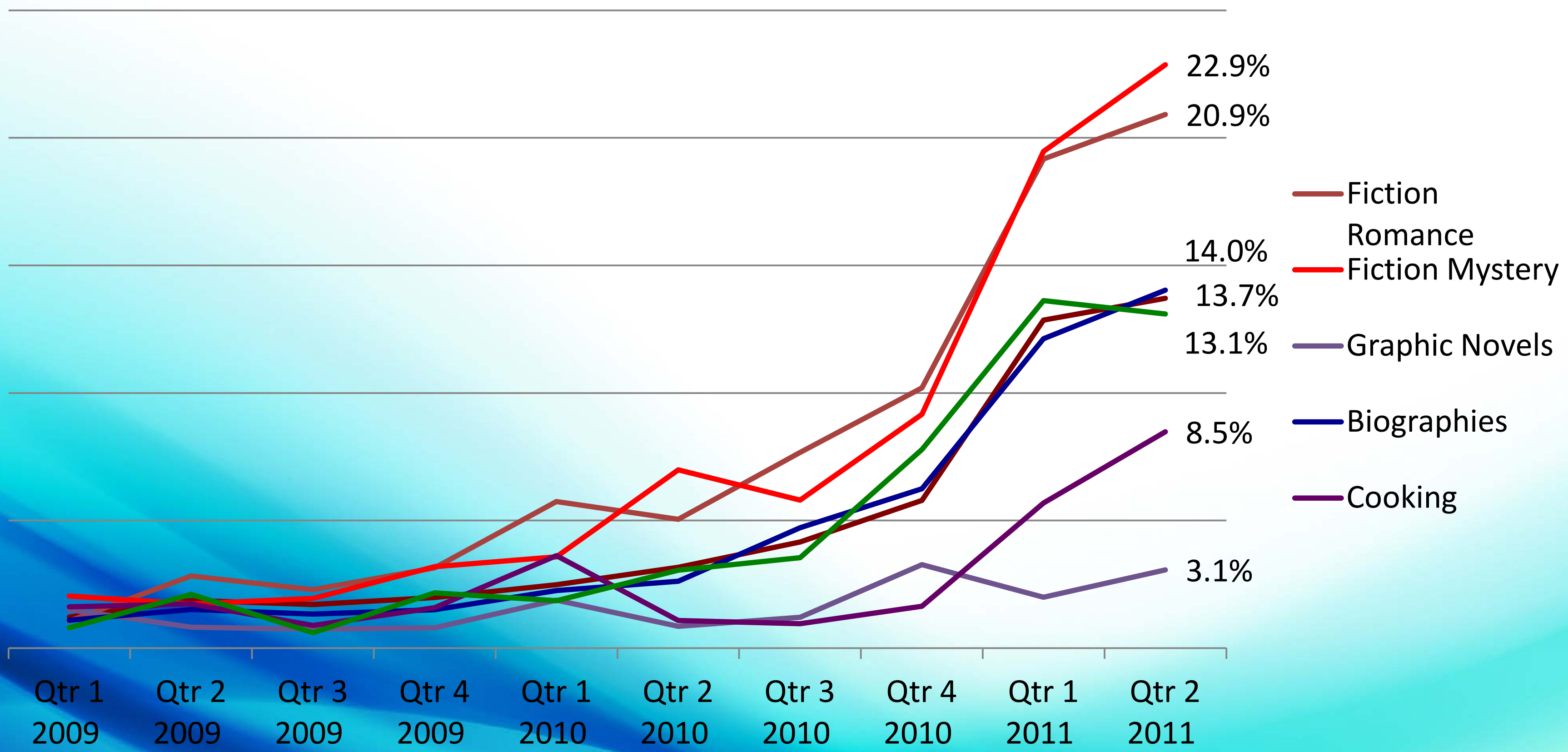
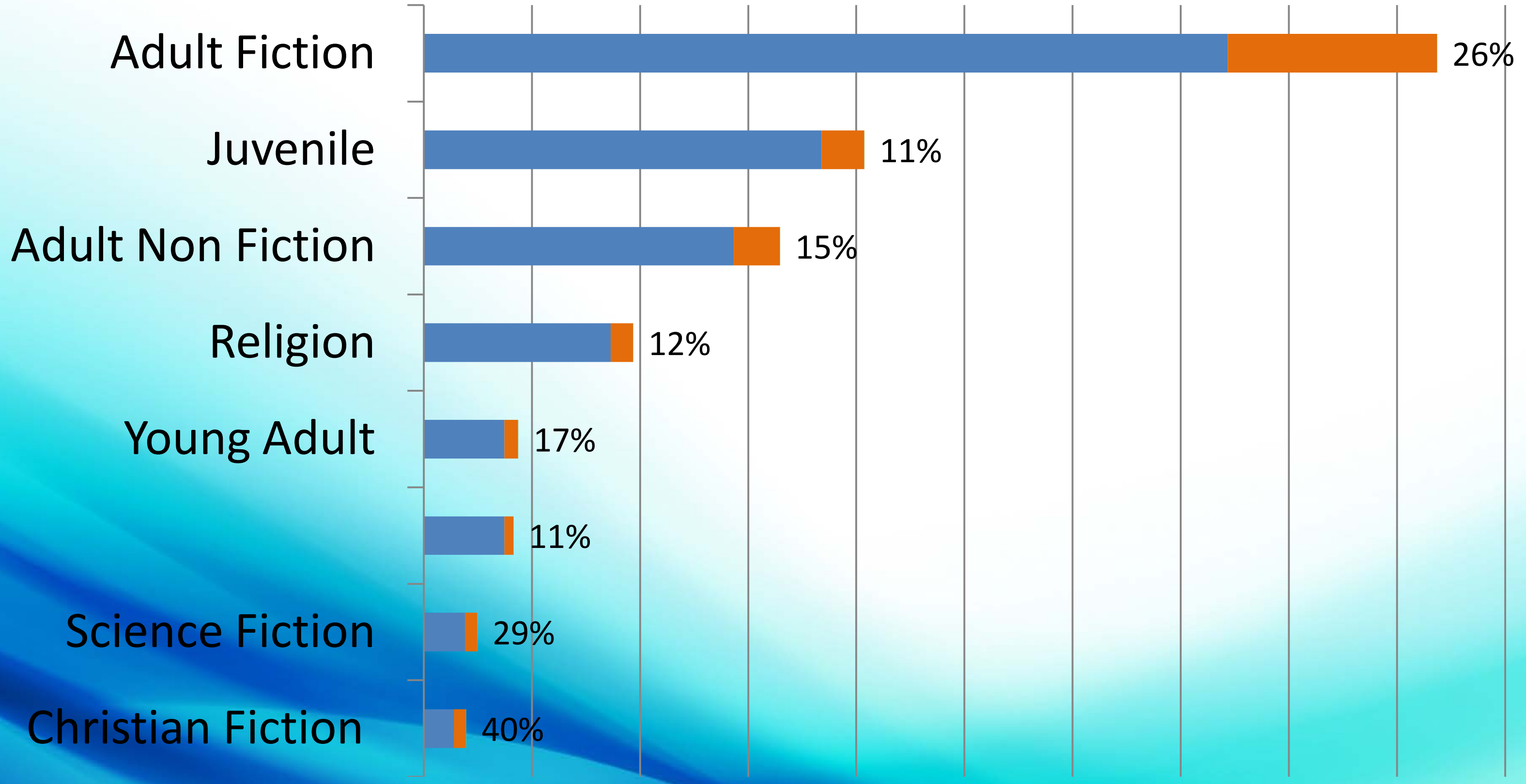
Fiction is Stranger than Truth



Q3 2011Genre Share and E-Book %



"e" Questions to Answer in 2012

- What is the continued growth capacity of Fiction?
- When will the other genres get moving?
- What roles does technology really play in adoption?

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Power Buyer = someone who purchases 4 or more books a month.

Cons r best

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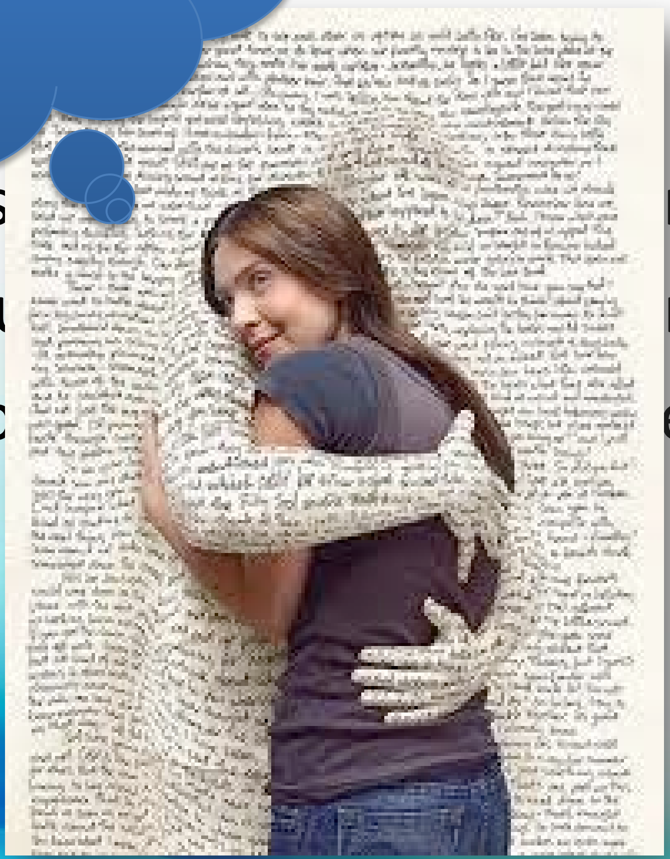
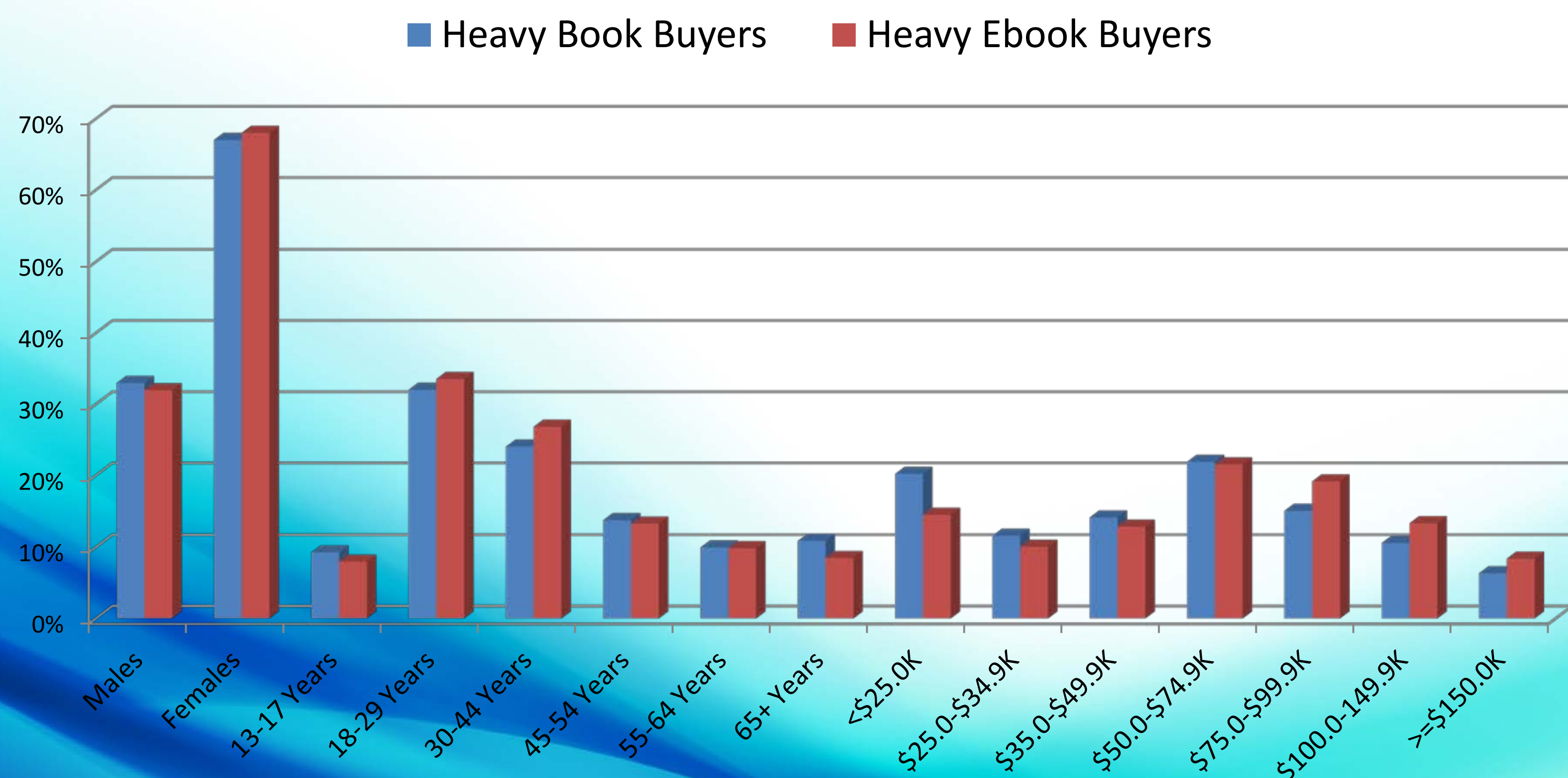
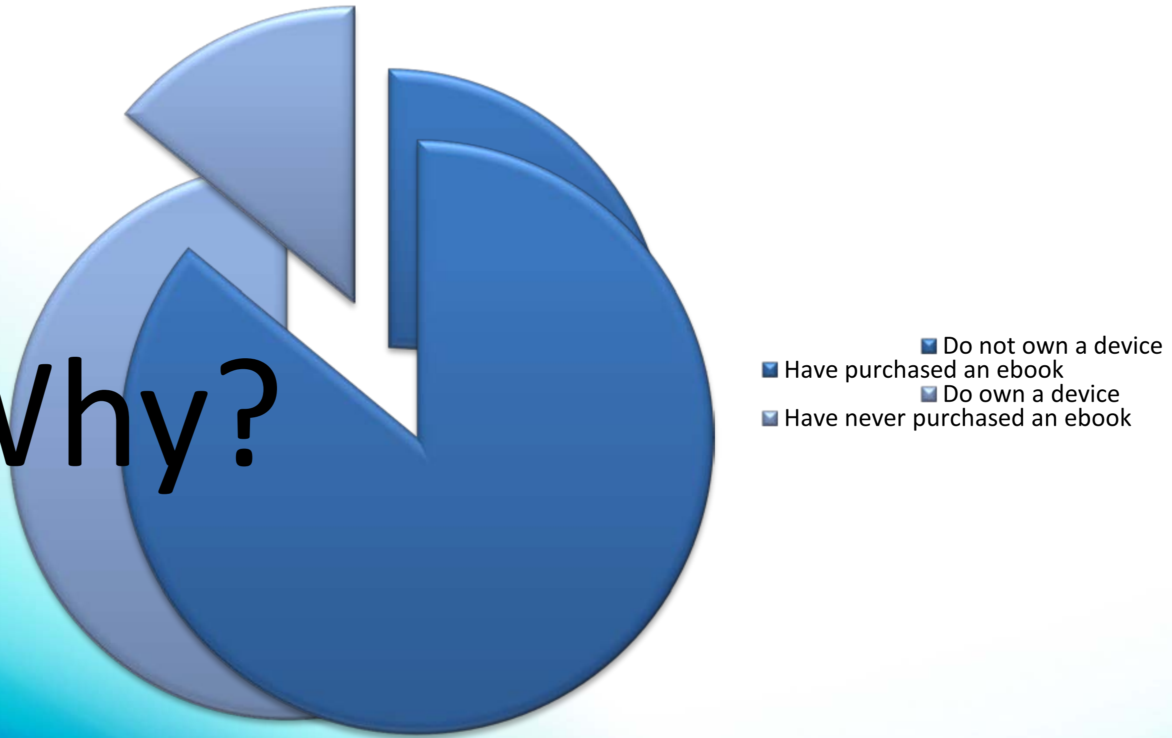
co ess



A Book Buyer by any Name… (or Format)



Why?


Do not own a device
Have purchased an ebook
Do own a device
Have never purchased an ebook

What keeps you from buying e-books?

	2:1	2:2	2:3	2:4	3:1
Prefer print	17.3%	15.6%	9.6%	8.7%	12.1%
Difficult to find/discover e-books	7.1%	6.5%	6.8%	6.0%	5.7%
Difficult to read on a screen	11.5%	9.5%	4.7%	3.7%	6.7%
Difficult to annotate	4.7%	4.0%	2.6%	2.0%	4.3%
Difficult to share with others	14.8%	13.6%	12.0%	10.0%	16.6%
Difficult to find titles available for my e-reading device	9.7%	7.3%	6.6%	4.8%	7.7%
Lack of a good e-reading device	10.3%	7.5%	5.2%	3.2%	4.9%
Difficult downloading process	4.9%	4.4%	1.7%	1.9%	2.2%
Not enough time	24.8%	26.8%	26.7%	32.3%	29.9%
Inability to legally re-sell or give away e-books after I'm done with them		15.1%	13.9%	11.9%	17.9%
Cost of the titles	27.1%	23.7%	28.4%	23.8%	30.3%
Nothing	17.6%	23.3%	27.1%	33.0%	21.9%

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Value of Power Buyers

Print

22% of Buyers

53% of Books Purchased

50% of $$$ Purchased

'e'

35% of Buyers

60% of eBooks Purchased

48% of $$$ Purchased

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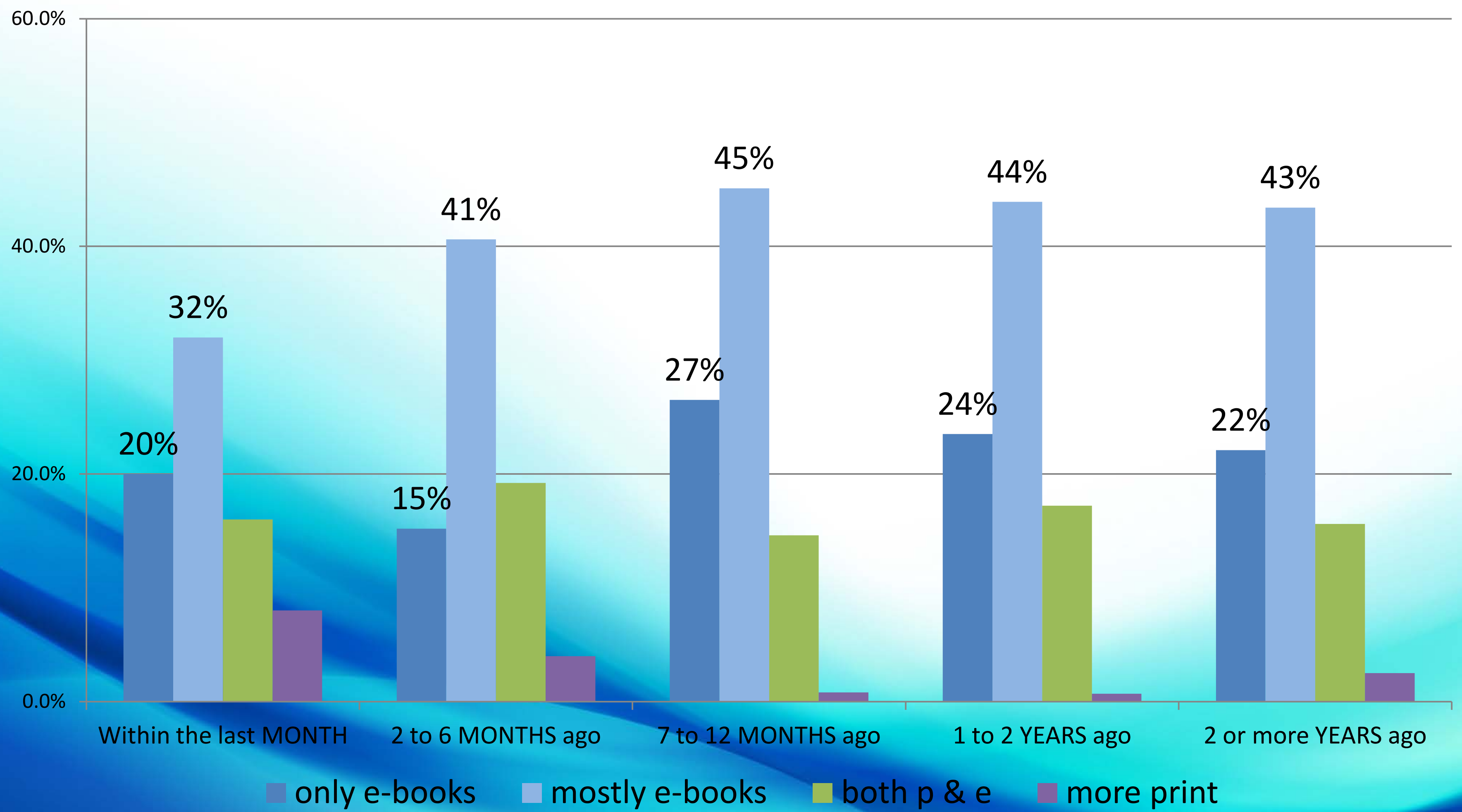
Power Buyers Demonstrate Loyalty



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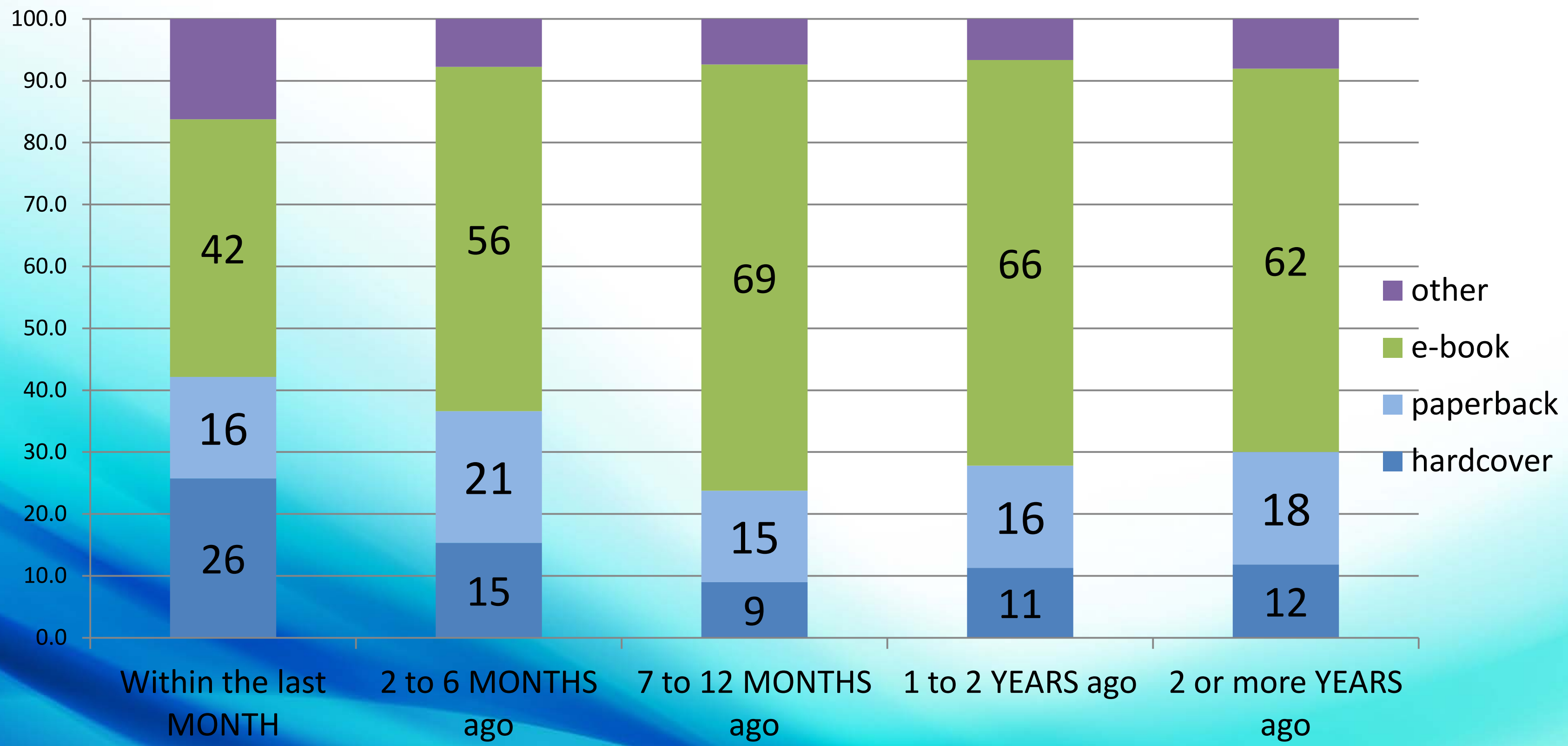
"E" at the Expense of "P"



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Scenario Planning

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Calm Before the Storm

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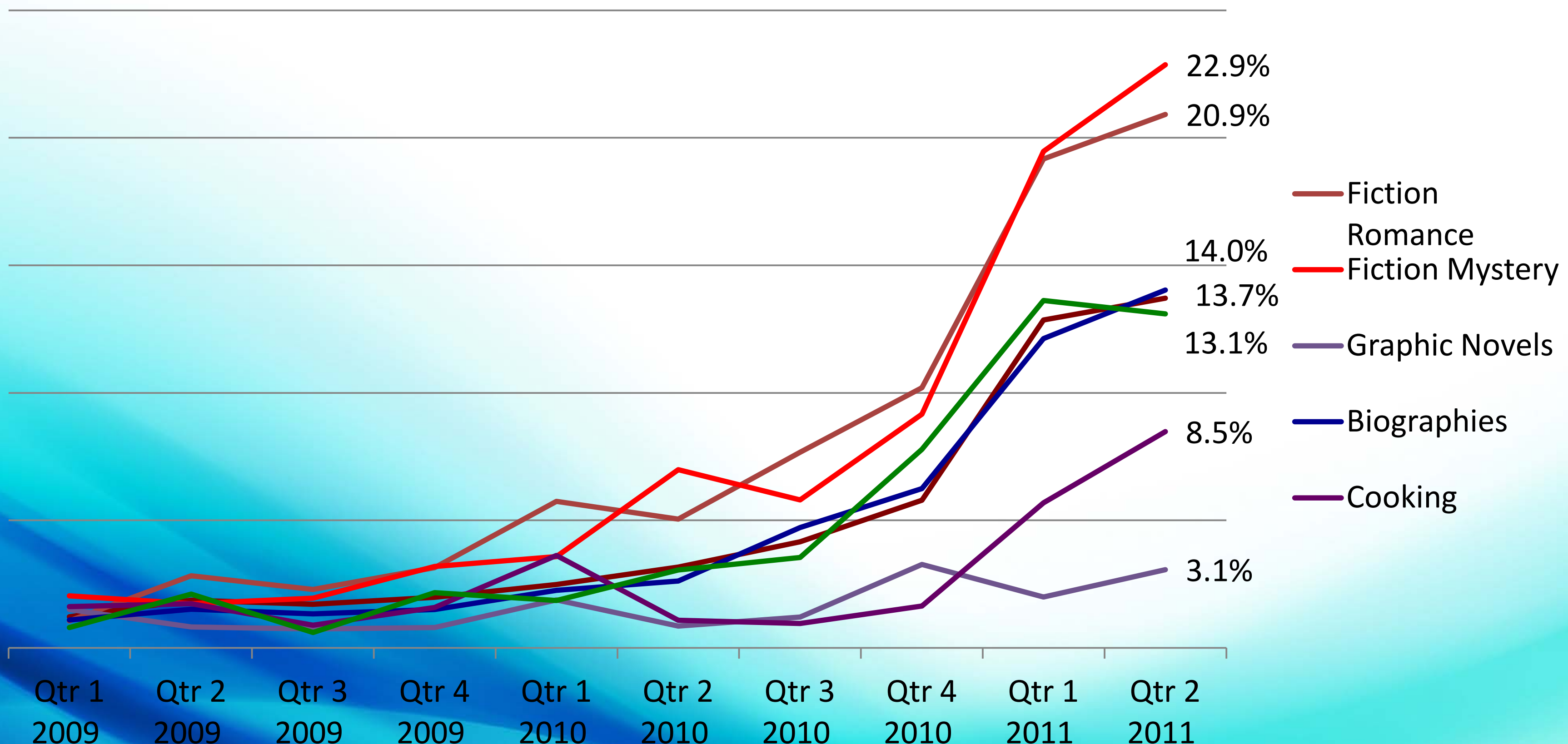
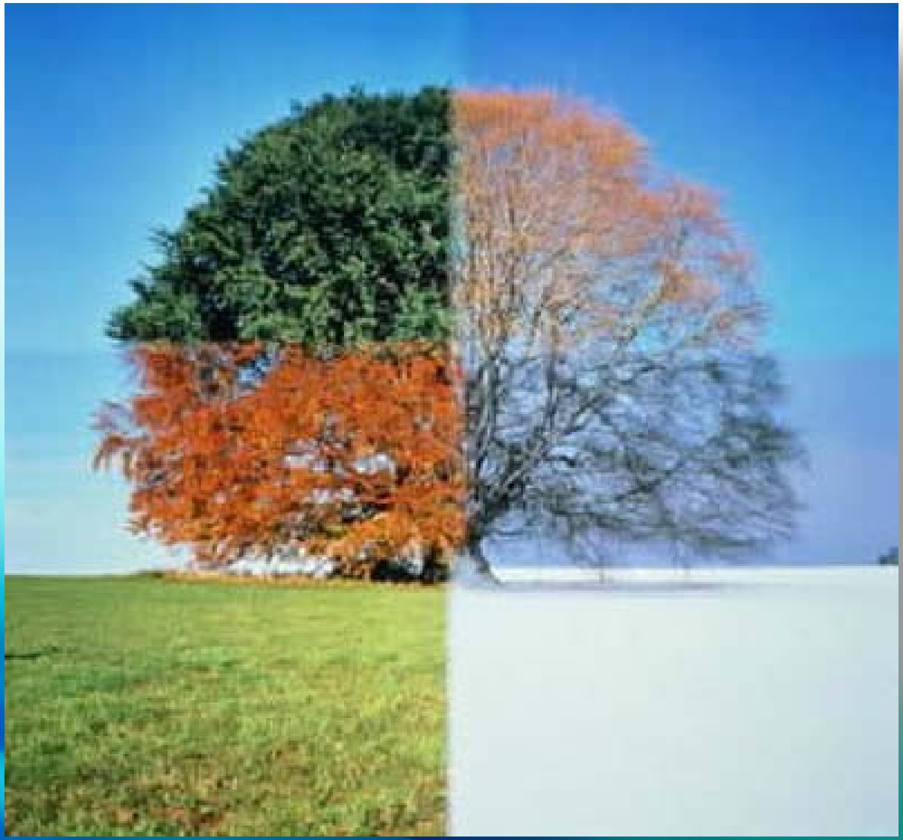
Fiction is Stranger than Truth



Seasonality



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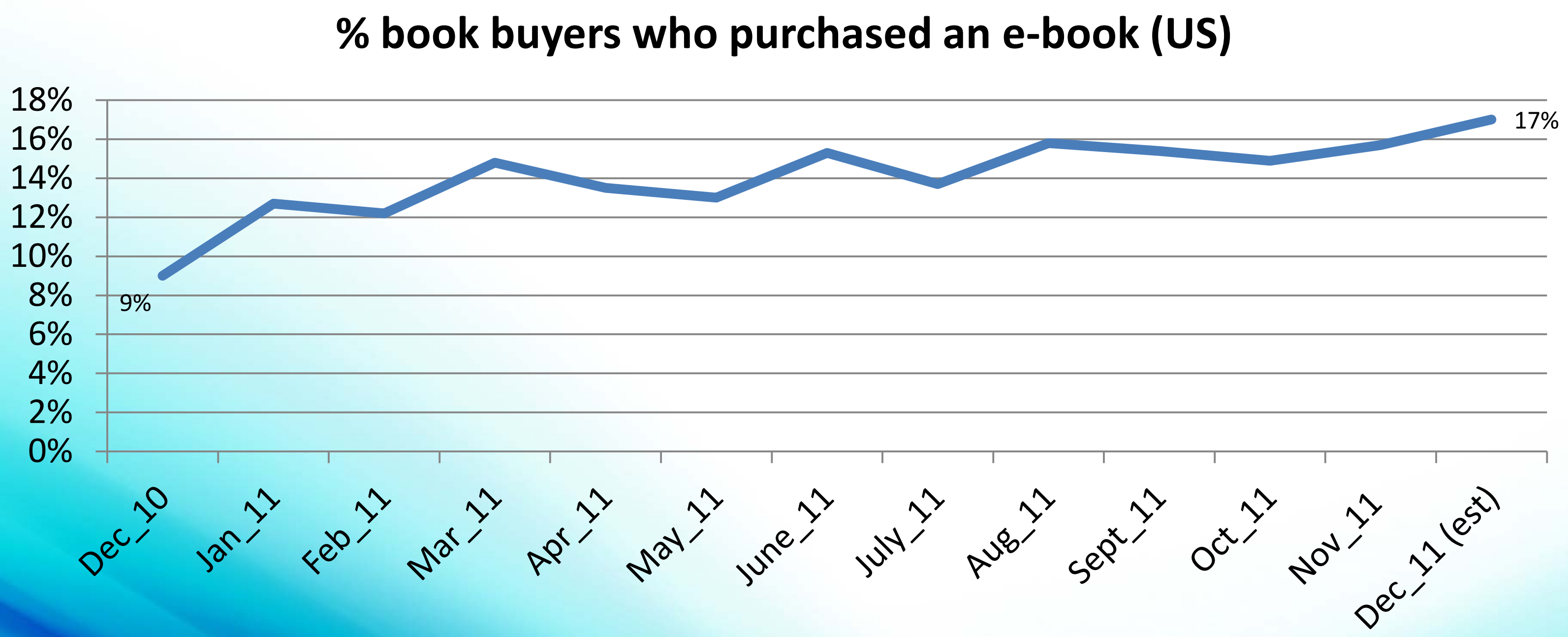
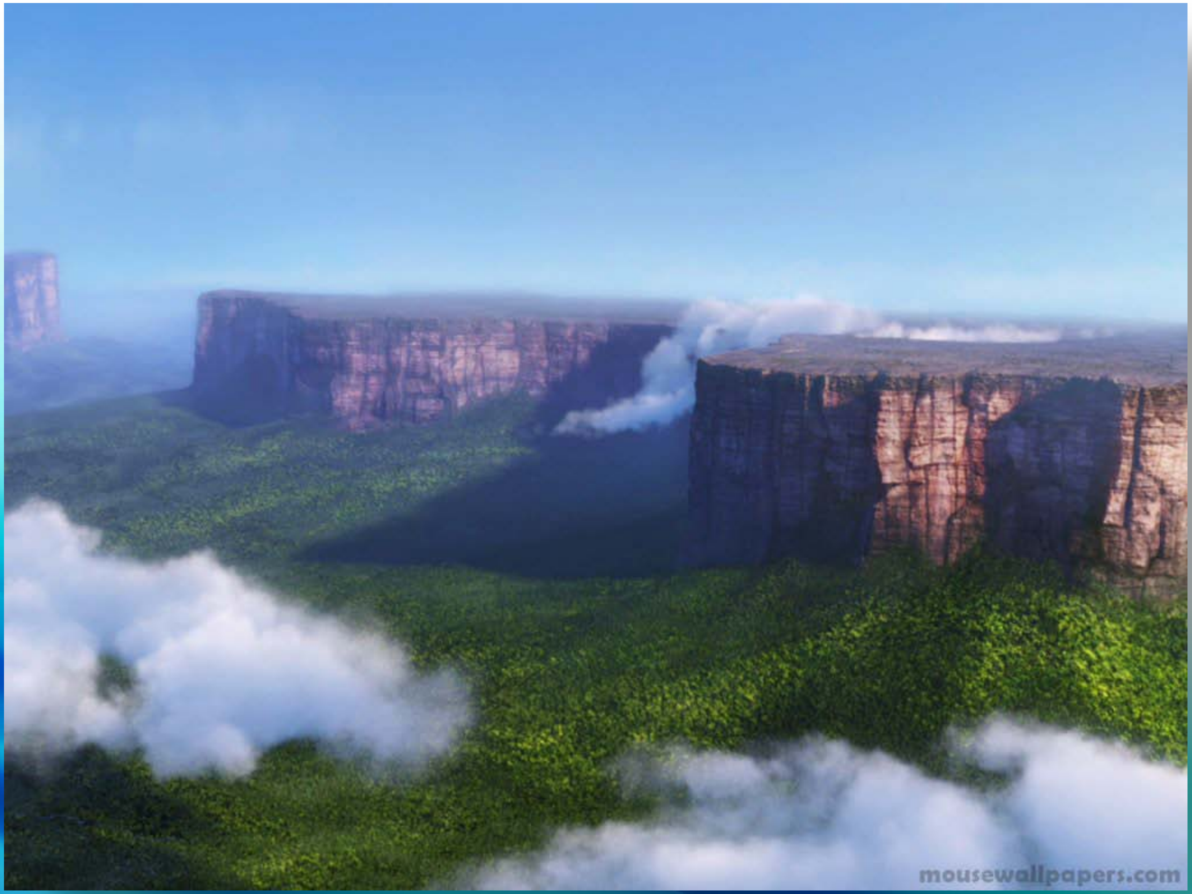


The Plateau



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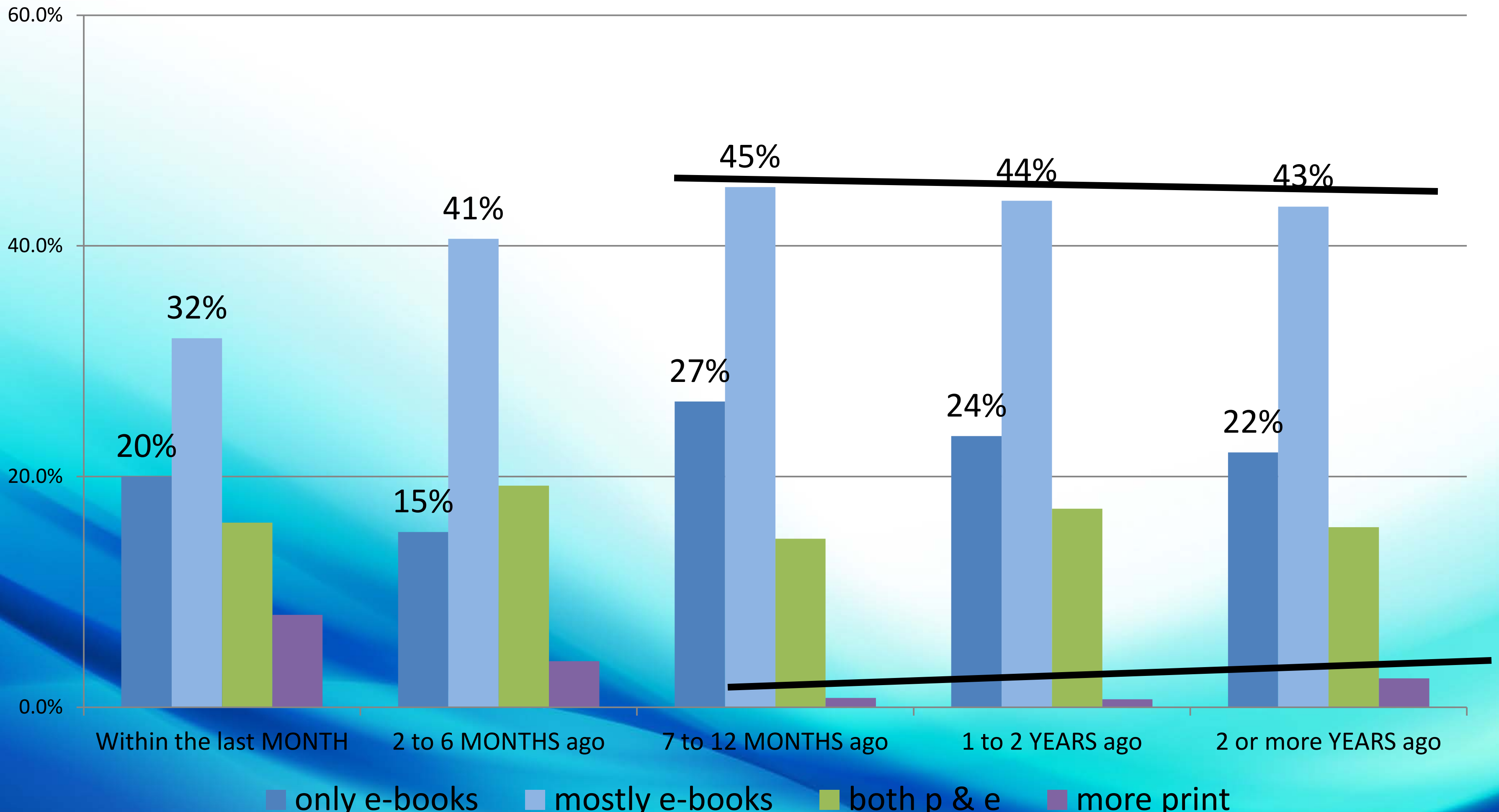
Power Buyers Demonstrate Loyalty



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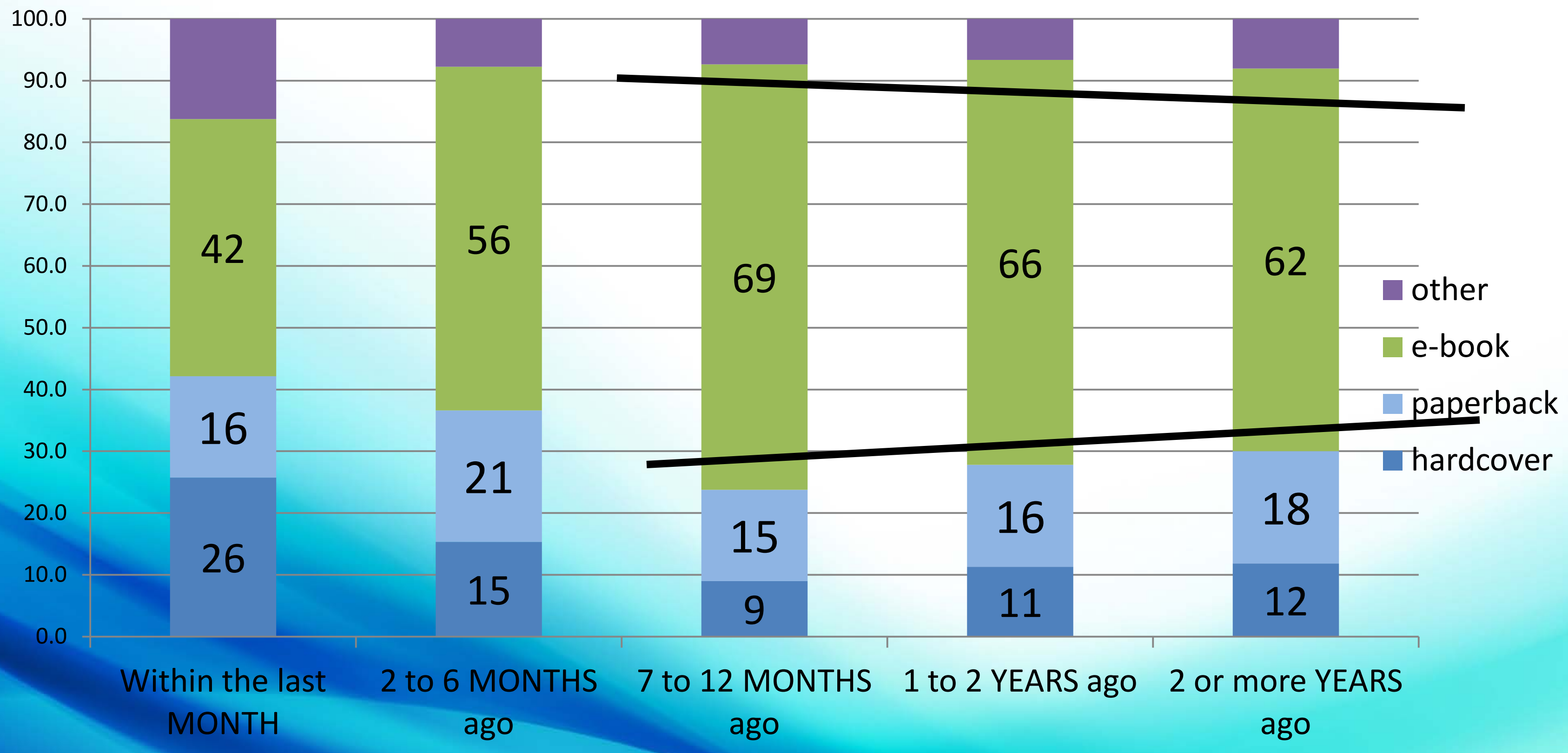
“E” at the Expense of “P”



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Saturated?

According to a Verso Digital study of consumer book buying habits, the number of consumers ***resistant*** to purchasing an e-reading device has ***increased*** from 40% in December 2009, to 52% in December 2011.

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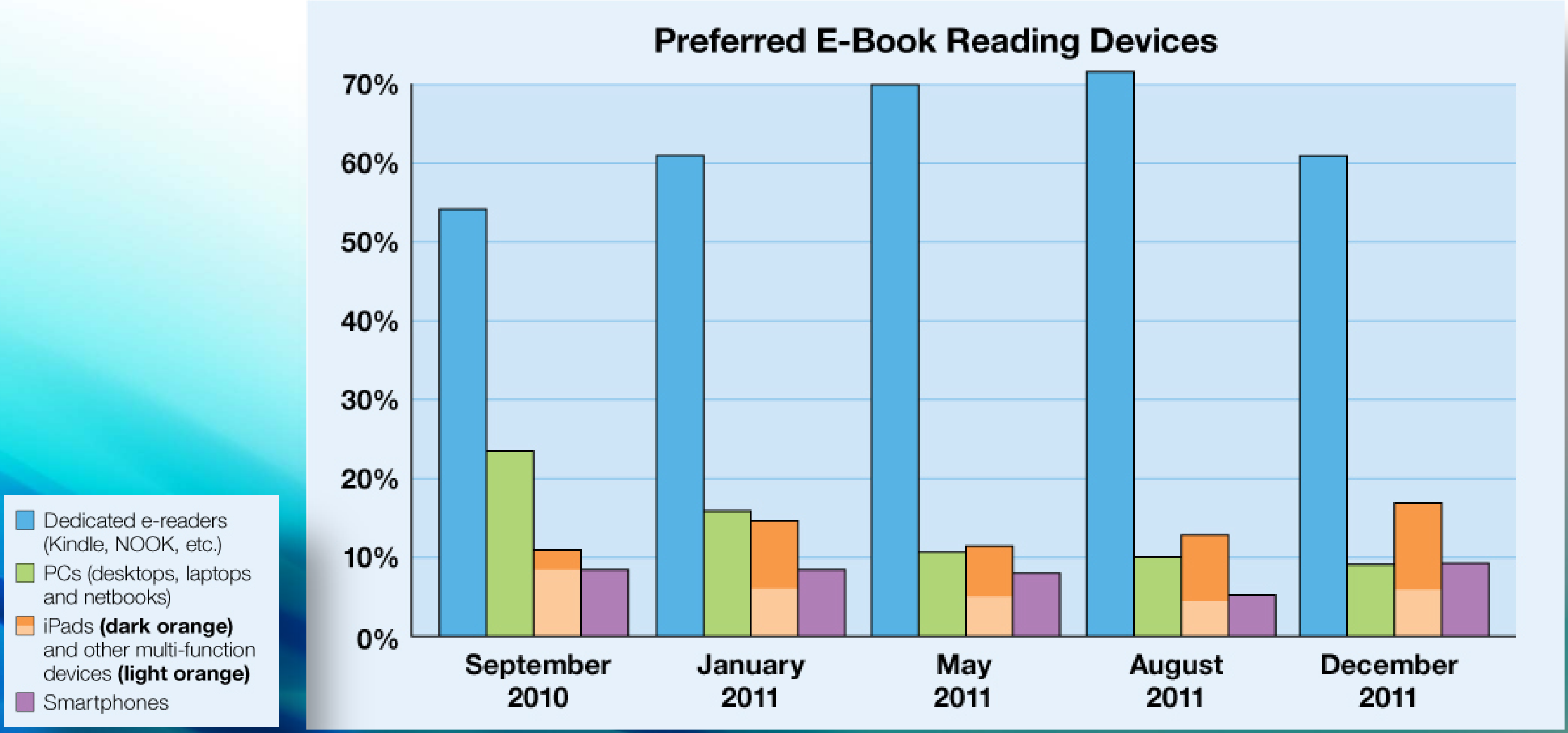
Multi-function Mayhem?



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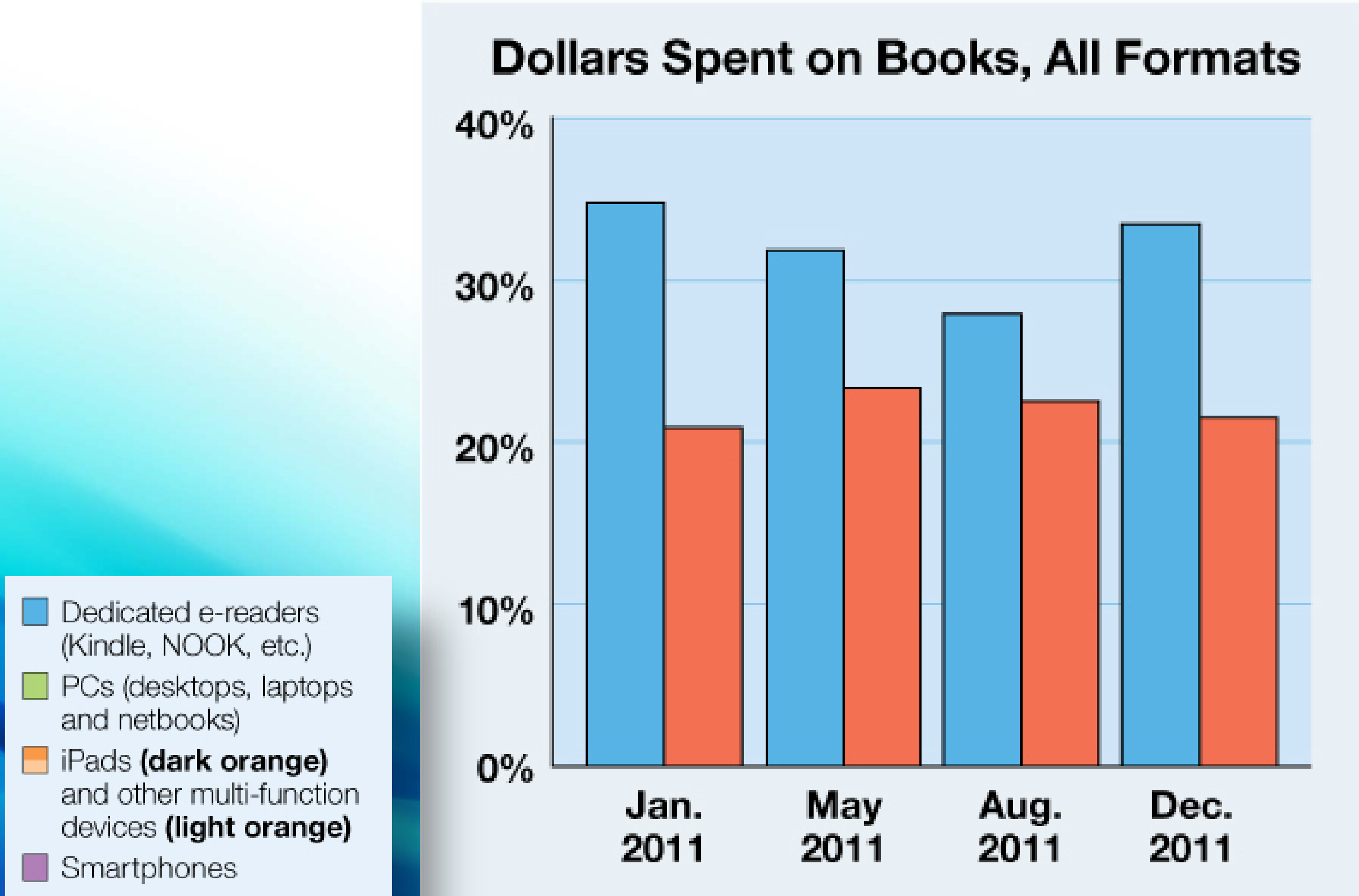

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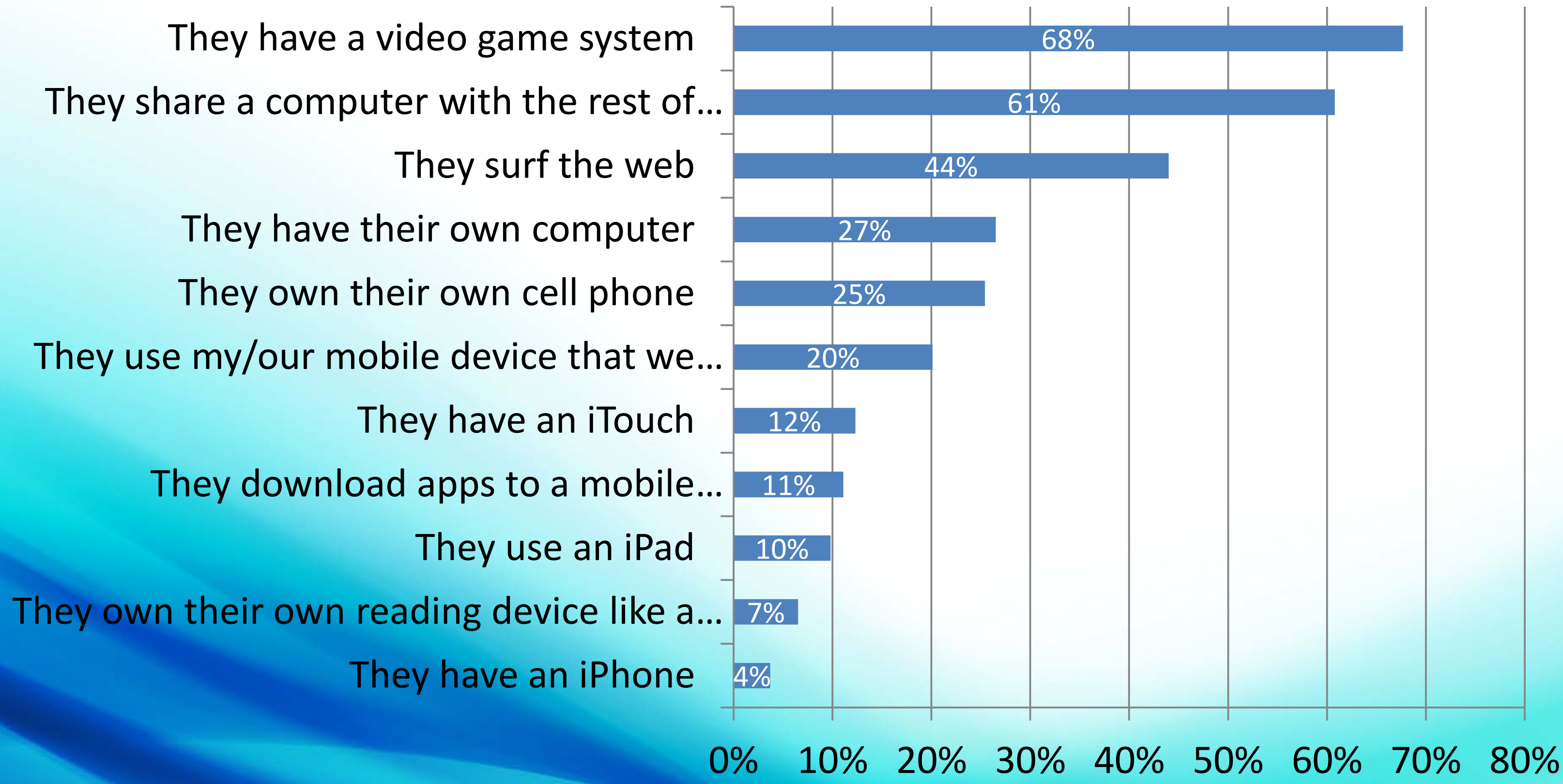
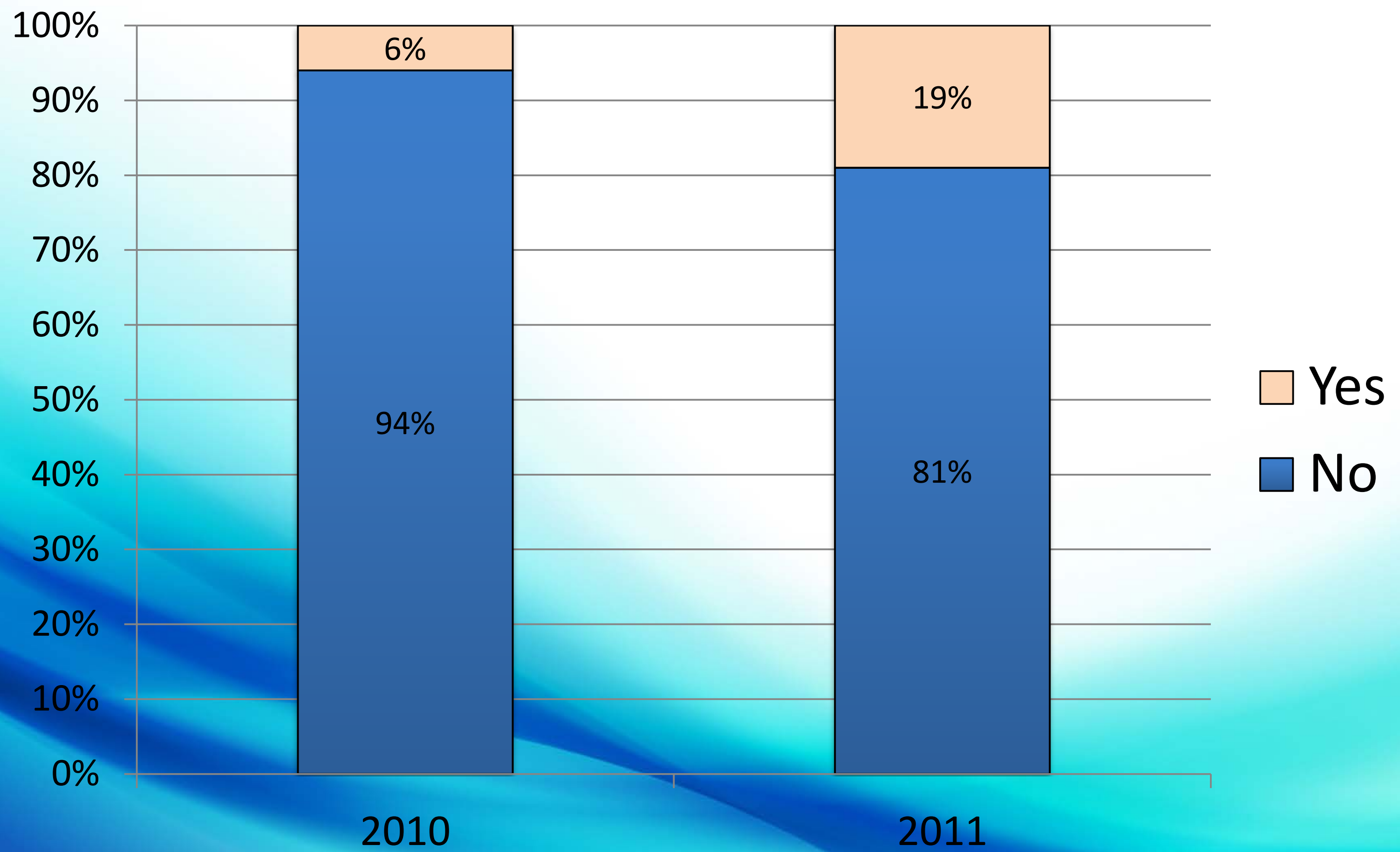
What about children and youth? Are they pathways to exponential growth?

Kids 7 – 12 Important Facts:



Teens Triple Rate of E-book Reading



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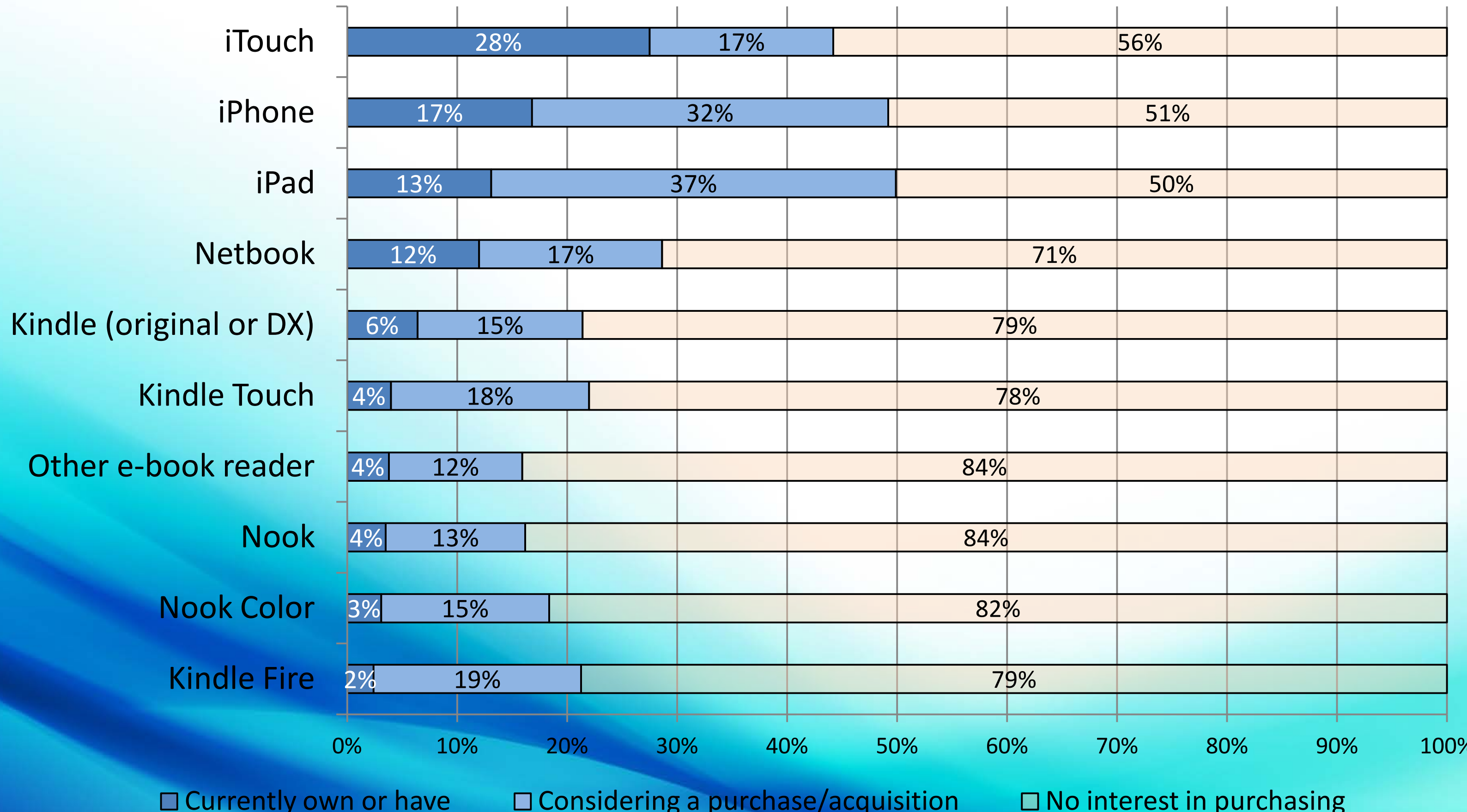
Apple is the Format of Choice



Bold Predictions for 2012?

25%

30%

40%

What's ultimately best for the industry?

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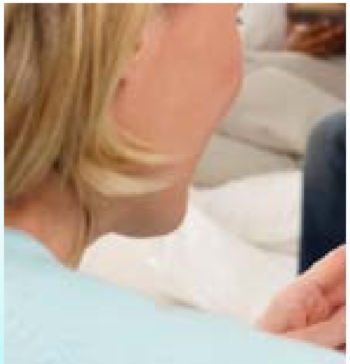


Global e-Book Monitor

Understanding e-book adoption around the world

Bowker Market Research/ToC 2012

Global e-Book Monitor – areas and partners

TATA

PEARSON

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ATKEARNEY

Methodology

- Initial coverage 10 markets where e-book adoption is at different stages
- USA, UK, France, Spain, Germany, Australia, Japan, South Korea, India, Brazil
- Minimum 1000 respondents in each market
- Minimum 250 current/potential downloaders in each market
- Fielded January 2012
- Standard set of questions about influences and activities:
  - Awareness and acquisition of digital content
  - Categories downloaded
  - Numbers of e-book purchased
  - Likelihood of acquiring digital content in the future
  - Types likely to be bought
  - Factors most likely to encourage e-book purchasing
  - Factors most likely to discourage e-book purchasing
  - Impact of digital material on book purchasing
  - Device access – current and potential

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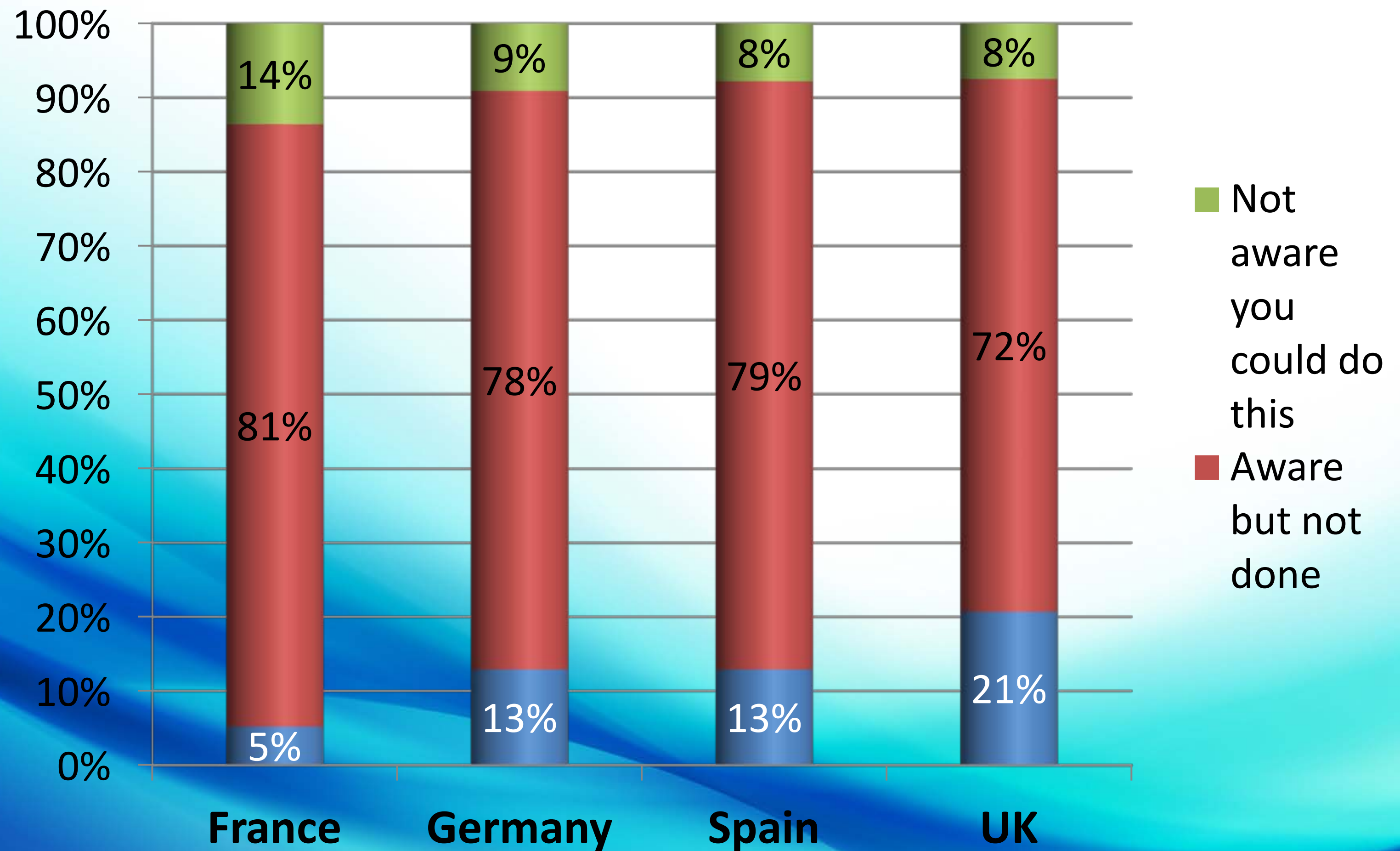
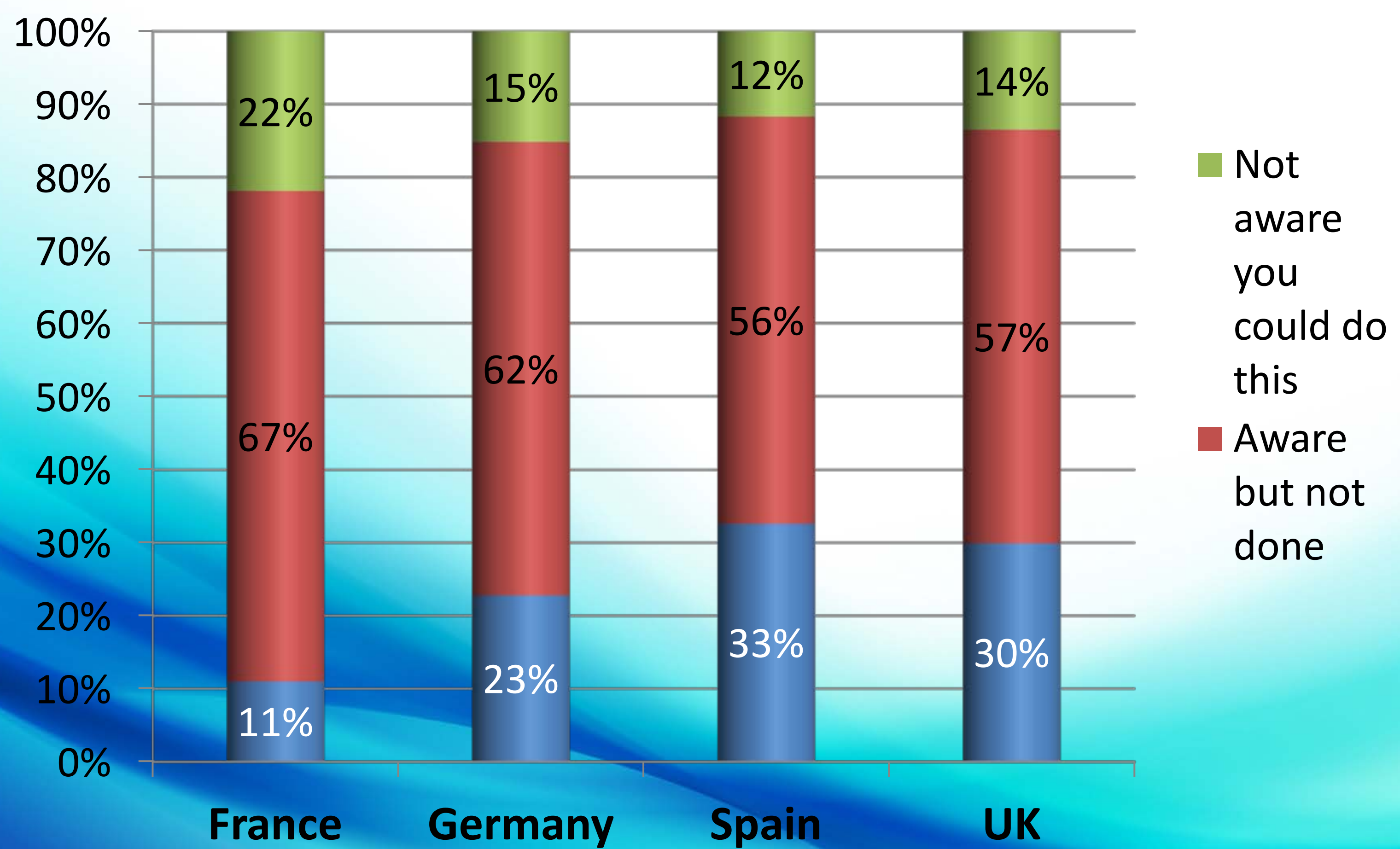
Some early key findings from first wave – Europe only

Awareness of and whether paid to download a complete e-book in past six months



Awareness of and whether downloaded a complete e-book for free in past six months



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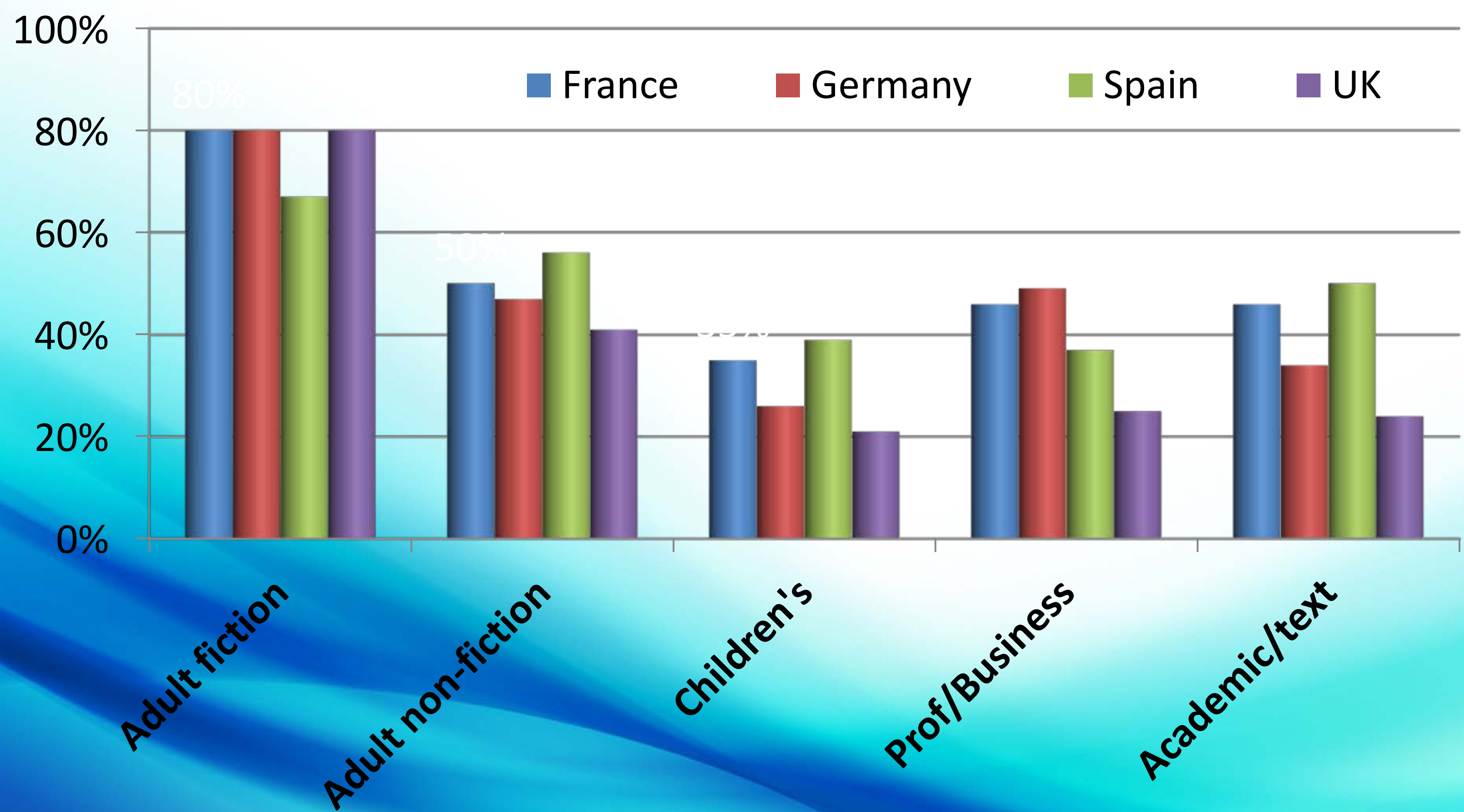
% of downloaders buying e-books in each category in last six months



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Key findings to be released via partners end March/early April –

Check BISG website for upcoming webinars

Thanks for Listening!

Kelly Gallagher
Vice President, Market Research
Bowker
Kelly.Gallagher@Bowker.com

Len Vlahos
Executive Director
Book Industry Study Group
len@bisg.org