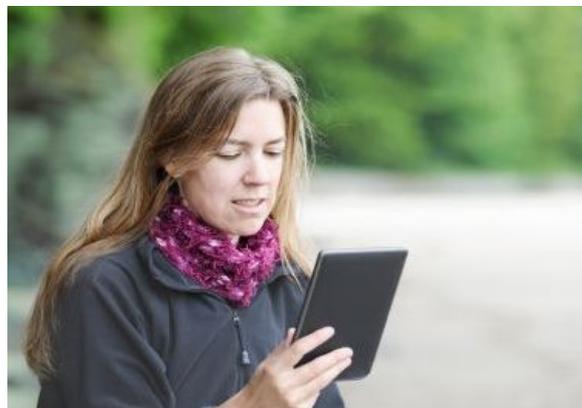


## Books and e-books - UK - September 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“In order to solve the problem of men’s lower reading rates a cultural shift is necessary, with books specifically highlighted as a worthy pastime for young boys starting from primary school and continuing onwards into secondary education.”

– Samuel Gee, Senior Technology and Media Analyst

### This report looks at the following areas:

- Men read less than women
- It’s becoming difficult to navigate existing book catalogues

The upheaval caused by the introduction of digital books and e-readers into the UK began, arguably, with Amazon’s release of the Kindle in 2009. Alongside the contemporaneous financial crisis the industry has been stricken with problems in the years since, with a number of mainstay retailers going into administration or forced to close numerous high street branches.

However, there are signs that the digital migration is substantially slowing down. E-reader growth has trickled to a standstill in the UK and US, and the proportion of market revenue taken by e-books is stabilising rather than increasing. Publishers find themselves in a market where budding authors using digital tools are more empowered to move ahead without them, but where novel crowd-sourcing solutions and distribution models are well placed to support their growth in the years to come.

This report examines the current state of the book and e-book market, looking at books that consumers buy, how they read them, the retailers used to buy books and consumers’ attitudes towards buying books. It also discusses attitudes towards spending on e-books, and the motivations of consumers who have removed themselves from the market altogether.

BUY THIS  
REPORT NOW

VISIT:  
[store.mintel.com](http://store.mintel.com)

CALL:  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

APAC  
+61 (0) 2 8284 8100

EMAIL:  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

## Books and e-books - UK - September 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Table of Contents

#### Introduction

Definitions

Exchange rates

Abbreviations

#### Executive Summary

The market

Figure 1: Value of the consumer books and e-books market, 2009 - 2019

Market factors

e-reader purchases are tailing off as Kindle competitors shut down

e-book price dispute between Amazon and publishers may boost self-published author rates

UK and US retailers focus on delivery and indie feel

Companies and products

Figure 2: Publisher revenue from sale of consumer print books, 2013

The consumer

Book formats consumers buy

Figure 3: Book formats consumers buy, April 2014

How consumers read books

Figure 4: How consumers read books, April 2014

Retailers used to buy books

Figure 5: Retailers used to purchase print books, April 2014

Figure 6: Retailers used to purchase e-books, April 2014

Attitudes towards buying books

Figure 7: How consumers choose which format to buy, April 2014

Figure 8: Attitudes towards buying books and e-books, April 2014

Attitudes towards spending money on e-books

Figure 9: Attitudes towards spending money on e-books, April 2014

Reasons consumers have not purchased books

Figure 10: Reasons for not having purchased books or e-books, April 2014

What we think

#### Issues and Insights

Men read less than women

The facts

The implications

It's becoming difficult to navigate existing book catalogues

The facts

The implications

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Books and e-books - UK - September 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Trend Application

Trend: FSTR HYPR

Trend: Attention Economy

## Market Drivers

### Key points

Kindle is the last e-reader standing as tablets increase in popularity

Figure 11: Household and personal ownership of computing technology, November 2009-July 2014

e-book price dispute between Amazon and publishers may boost self-published author rates

Figure 12: Amazon US genre bestsellers by format, February 2014

Figure 13: Estimated Amazon US e-book genre bestseller metric breakdown by publisher type, February 2014

Kindle Unlimited promotes "Netflix-for-books"

UK and US retailers focus on delivery and indie feel

Crowdfunded books gain pace

Figure 14: Kickstarter total launched projects per category, and category project success rate, July 2014

## Who's Innovating?

### Key points

Kindle Unlimited brings all-you-can-eat model to e-readers.

Google's same day delivery bests Amazon Prime

Zoobean provides personalised book recommendations for parents

Poptropica app modernises adventurous narrative discovery site

## Market Size, Forecast and Channels

### Key points

Total consumer market hovering before growth

Figure 15: Value of total consumer market book sales, 2009-19

Figure 16: Value of total consumer market print book sales, 2009-19

Figure 17: Value of total consumer market e-book sales, 2009-19

### Forecasts

Figure 18: Forecast value of books and e-books sales, 2009-19

Figure 19: Forecast value of books and e-books sales, 2009-19

Figure 20: Forecast value of books and e-books sales, 2009-19

## Market Share and Segmentation

### Key points

Penguin Random House retains market control

Figure 21: Publisher revenue from sale of consumer print books, 2011 - 2013

e-book sales increase slowly

Figure 22: Big Five\* volume digital sales, 2011 - 2013

Figure 23: Total publisher UK volume sales by physical and digital, 2013

Fifty Shades of Grey continues to distort 2012's figures

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Books and e-books - UK - September 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 24: Total domestic and export publisher sales of physical and digital books, by net invoiced value, by segment, 2009 - 2013

Figure 25: Total domestic and export publisher sales of physical books, by net invoiced value, by segment, 2009 - 2013

Figure 26: Total domestic and export publisher sales of digital books, by net invoiced value, by segment, 2009 - 2013

Figure 27: Total domestic and export net invoiced digital value as a proportion of net invoiced total value, by segment, 2009 - 2013

### Companies and Products

#### Penguin Random House

##### Background

##### Company financials and strategy

Figure 28: Penguin Random House revenue, 2012-13

#### Hachette

##### Background

##### Financials and strategy

Figure 29: Hachette Livre financial data (€), 2012-13

Figure 30: e-book share of Hachette Livre's total sales, 2008-13

Figure 31: Hachette revenue breakdown by territory, 2011-13

#### HarperCollins

##### Background

##### Financials and strategy

Figure 32: HarperCollins UK financial data, 2012-13

#### Macmillan Publishers

##### Background

##### Financials and strategy

Figure 33: Macmillan publishers UK financial data, 2011-12

Figure 34: Macmillan global revenue breakdown, 2011-12

#### Simon & Schuster

##### Background

##### Financials and strategy

Figure 35: Simon & Schuster UK financial data, 2011-12

Figure 36: Simon & Schuster UK geographical revenue, 2011 - 2012

### Brand Communication and Promotion

#### Key points

##### Sainsbury's Bumper Book of Summer promotion pushes it to second spot

Figure 37: Top 10 advertisers of print books, by 2013 adspend, 2010-13

Figure 38: Print book adspend by media type, 2013

### The Consumer – Book Formats Consumers Buy

#### Key points

##### Almost seven in ten buy print books

Figure 39: Consumer book purchases, April 2014

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
 EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Books and e-books - UK - September 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 40: Consumer book purchases, (Nets), April 2014

Figure 41: Consumer book purchases, by age, April 2014

### Quarter of e-reader owners have not bought e-books

Figure 42: Purchase of paperbacks and e-books in the last 12 months, by device ownership, April 2014

### Over half of e-book buyers also bought paperback book

Figure 43: Book purchases by book purchases, April 2013

## The Consumer – How Consumers Read Books

### Key points:

#### More people have read than bought a print book

Figure 44: How consumers read books, April 2014

#### Under half of consumers read print books exclusively

Figure 45: Consumers who read in exclusive formats, by all consumers and all book buyers, April 2014

#### e-readers reflect greater female interest in reading

Figure 46: Book purchases in the last 12 months, by gender, April 2014

Figure 47: How consumers read books, by gender, April 2014

#### Reasonably high computer reading suggests potential success for subscription services

#### Desktop readers the most likely to have bought many book formats

Figure 48: Purchase of books in the last 12 months, by how consumers read books, April 2014

#### e-book readers still likely to read paperbacks

Figure 49: Cross-format reading, April 2014

## The Consumer – Retailers Used to Buy Books

### Key points

#### Consumers stay single-channel to buy print books

Figure 50: Retailers used to purchase print books, April 2014

Figure 51: Retailers used to purchase print books either in-store or online, April 2014

#### Little brand exclusivity as buyers shop around

#### e-books dominated by Amazon

Figure 52: Retailers used to purchase e-books, April 2014

Figure 53: Purchase of e-books from digital-only and bricks and mortar stores, by age, April 2014

## The Consumer – Attitudes towards Buying Books and e-Books

### Key points

#### Four in ten choose format based on price alone

Figure 54: How consumers choose which format to buy, April 2014

#### High format crossover explained by circumstance

Figure 55: Attitudes towards buying books and e-books, April 2014

#### Book quality influences purchases for a fifth

## The Consumer – Attitudes towards Spending Money on e-Books

### Key points

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Books and e-books - UK - September 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### A third of e-book buyers prefer print books

Figure 56: Attitudes towards spending money on e-books, April 2014

### Boost in reading does not spill over to print books

Figure 57: Purchases made in the last 12 months, by attitudes towards spending money on e-books, April 2014

Figure 58: Book formats read in the last 12 months, by attitudes towards spending money on e-books, April 2014

### A fifth buy e-books to maximise e-reader value

## The Consumer – Reasons Consumers Have Not Bought Books

### Key points:

#### One third of consumers not interested in reading

Figure 59: Reasons consumers give for not having purchased books or e-books in the last 12 months, April 2014

Figure 60: Reasons consumers have not bought books in the last 12 months, by gender, April 2014

Figure 61: Reasons consumers have not bought books in the last 12 months, by gender, April 2014

#### Low library usage among non-buyers

#### Consumers indicate they have too many books

## Appendix – Market Size and Forecast

Figure 62: Total books and e-books market best and worst case forecast, 2014 - 2019

Figure 63: Print books best and worst case forecast, 2014 - 2019

Figure 64: E-books best and worst case forecast, 2014 - 2019

## Appendix – The Consumer – Book Formats Consumers Buy

Figure 65: Consumer book purchases, April 2014

Figure 66: Most popular consumer book purchases, by demographics, April 2014

Figure 67: Next most popular consumer book purchases, by demographics, April 2014

Figure 68: Least popular consumer book purchases, by demographics, April 2014

Figure 69: How consumers choose which format to buy, April 2014

Figure 70: Consumer book purchases, April 2014

Figure 71: Consumer reading habits, by consumer book purchases, April 2014

Figure 72: Retailers used to purchase e-books, by consumer book purchases – In-store, April 2014

## Appendix - The Consumer – How Consumers Read Books

Figure 73: Consumer reading habits, April 2014

Figure 74: Consumer reading habits, by demographics, April 2014

Figure 75: Consumer book purchases, by consumer reading habits, April 2014

Figure 76: Consumer reading habits, by consumer reading habits, April 2014

Figure 77: Retailers used to purchase e-books, by consumer reading habits, April 2014

Figure 78: Consumer book purchases, by most popular retailers used to purchase e-books, April 2014

Figure 79: Consumer book purchases, by least popular retailers used to purchase e-books, April 2014

## Appendix – The Consumer – Retailers Used to Buy Books

Figure 80: Retailers used to buy print books, April 2014

Figure 81: Most popular retailers used to buy print books – Online or in store, by demographics, April 2014

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Books and e-books - UK - September 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 82: Next most popular retailers used to buy print books – Online or instore, by demographics, April 2014

Figure 83: Most popular retailers used to buy print books – In-store, by demographics, April 2014

Figure 84: Next most popular retailers used to buy print books – In-store, by demographics, April 2014

Figure 85: Most popular retailers used to buy print books – Online, by demographics, April 2014

Figure 86: Next most popular retailers used to buy print books – Online, by demographics, April 2014

Figure 87: Retailers used to purchase e-books, April 2014

Figure 88: Most popular retailers used to purchase e-books, by demographics, April 2014

Figure 89: Next most popular retailers used to purchase e-books, by demographics, April 2014

Figure 90: Least popular retailers used to purchase e-books, by demographics, April 2014

Figure 91: Retailers used to buy audiobooks, April 2014

### Appendix – The Consumer – Attitudes towards Buying Books and e-Books

Figure 92: Attitude towards and print books and e-books, April 2014

Figure 93: Most popular attitude towards and print books and e-books, by demographics, April 2014

Figure 94: Next most popular attitude towards and print books and e-books, by demographics, April 2014

Figure 95: Consumer book purchases, by attitudes towards spending money on books and e-books, April 2014

Figure 96: Consumer reading habits, by other attitudes towards spending money on books and e-books, April 2014

### Appendix – The Consumer – Attitudes towards Spending Money on e-books

Figure 97: Attitudes towards spending money on books and e-books, April 2014

Figure 98: Attitudes towards spending money on books and e-books, by demographics, April 2014

### Appendix – The Consumer – Reasons Consumers Have Not Bought Books

Figure 99: Attitudes of non-book buyers, April 2014

Figure 100: Most popular attitudes of non-book buyers, by demographics, April 2014

Figure 101: Next most popular attitudes of non-book buyers, by demographics, April 2014

Figure 102: Consumer reading habits, by attitudes of non-book buyers, April 2014

Figure 103: Attitudes of non-book buyers, by attitudes of non-books buyers April 2014

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)