

YEAR IN BOOKS REVIEW

2015

nielsen
.....

AN UNCOMMON SENSE
OF THE CONSUMER™



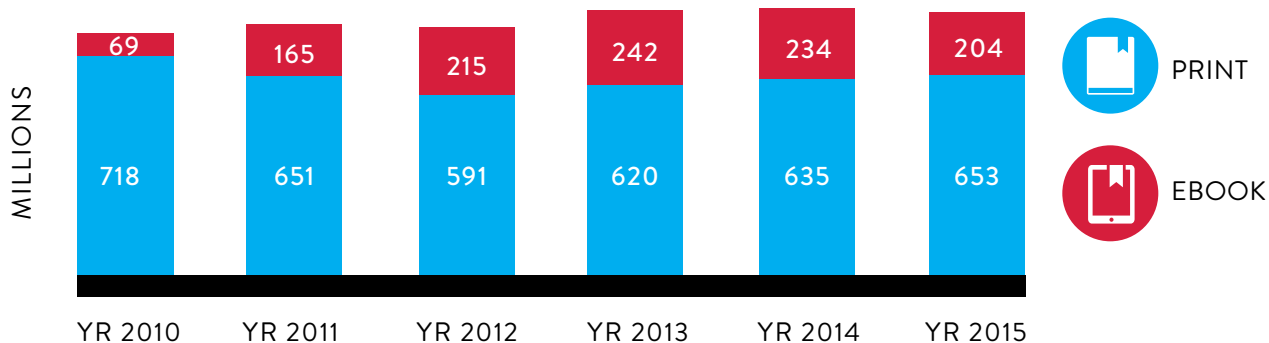
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January	Paula Hawkins' debut psychological thriller <i>The Girl on the Train</i> is published January 13 th and goes on to sell a combined 3.7m print + eBook units in 2015. The film adaptation will be released in October 2016.
April	Sales increase 16% in the week leading up to Easter with children's up 31% on the prior week, an additional 1.3m kids' books sold than the week prior.
June	E.L. James' new <i>Fifty Shades</i> title <i>Grey</i> is published June 18 th and sells 1.4m combined print + eBook units in the month alone.
June	Penguin Random House signs a deal with Amazon, becoming the last of the Big 5 publishers to sell eBooks in a version of agency pricing.
July	Harper Lee's <i>Go Set a Watchman</i> is released on July 14 th and sells 747,000 print copies in its first week. <i>Watchman</i> is the #1 bestseller of the year.
September	Perseus Books announces plans to sell. Hachette will eventually buy Perseus in Q1 2016.
September	Best-selling women's fiction author Jackie Collins dies. Her print book sales jump 300% in the week following her death.
September	Oyster, once called the "Netflix" of book subscriptions, shuts down. As a result, subscriptions fall from 10% of eBooks purchased in 2014 to 5% in 2015.
September	Nielsen Book hosts its second Children's Book Summit at Convene in NYC.
October	Sales of Johanna Basford's third book, <i>Lost Ocean</i> , released this month, shows adult coloring books have arrived as an important new genre. Basford's three coloring books combined sold 2m copies in 2015.
October	Nielsen Book hosts its first Christian Book Summit in Nashville, where we unveiled 4 key segments of American Christians to help publishers better target their marketing and sales efforts.
November	Abrams releases the 10 th book in Jeff Kinney's <i>Diary of a Wimpy Kid</i> Series which sells 315,000 print copies in release week. <i>Old School</i> becomes the #2 bestseller in 2015 with only 2 months of sales.
November	Ta-Nehisi Coates wins the non-fiction National Book Award for his moving memoir on race, <i>Between the World and Me</i> .
November	Book sales are up 12% the week of Black Friday - November 27 - on the prior week, with mass merch sales up 31%.
December	Holiday book purchasing resulted in 115m units sold in December alone, accounting for 18% of total 2015 sales.

2 CONSUMPTION CHARTS

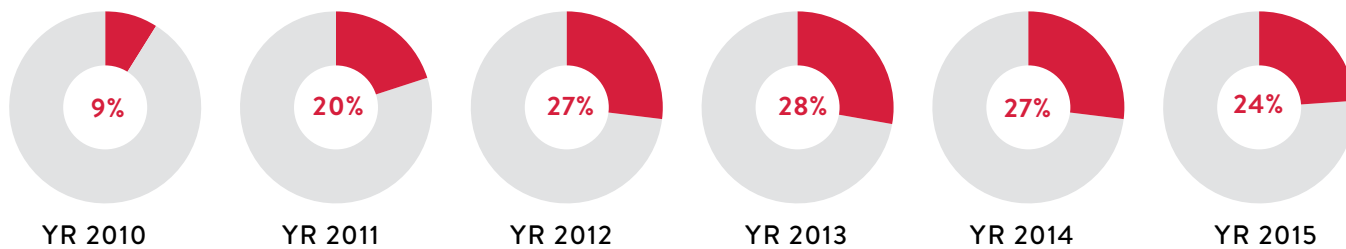
BookScan's total print book sales of 653 million units were up 2.8% in units from 2014. On the flip side, traditionally published eBooks were down 13% in units according to PubTrack Digital - which tracks POS data through publishers for approximately 85% of the traditionally published eBook market.



Source: BookScan/PubTrack Digital

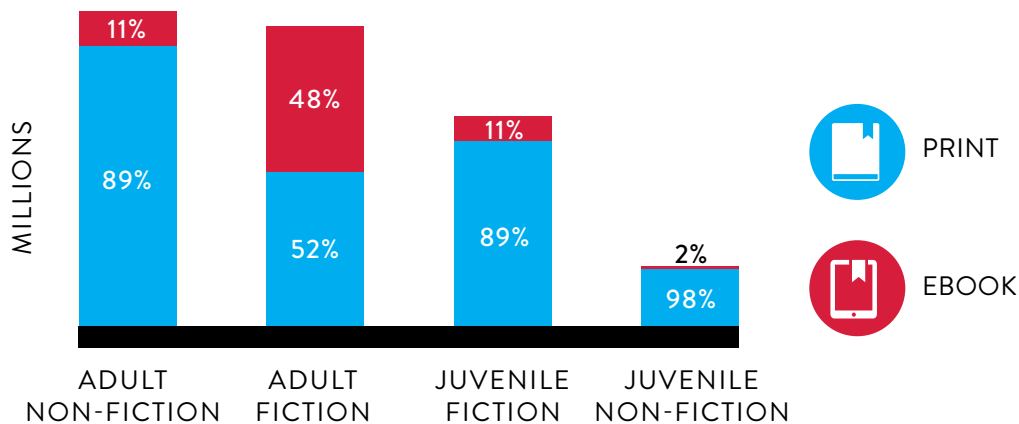
EBOOK SHARE

EBook sales tracked by Nielsen PubTrack Digital were down from 27% of the total market in 2014 to 24% of the total market in 2015. Of course, certain categories had a larger representation in digital, such as Romance with 60% eBooks and Thrillers with 51% eBooks in 2015.



Source: BookScan/PubTrack Digital

*2015 PT-Digital figures are weighted to reflect panel changes.

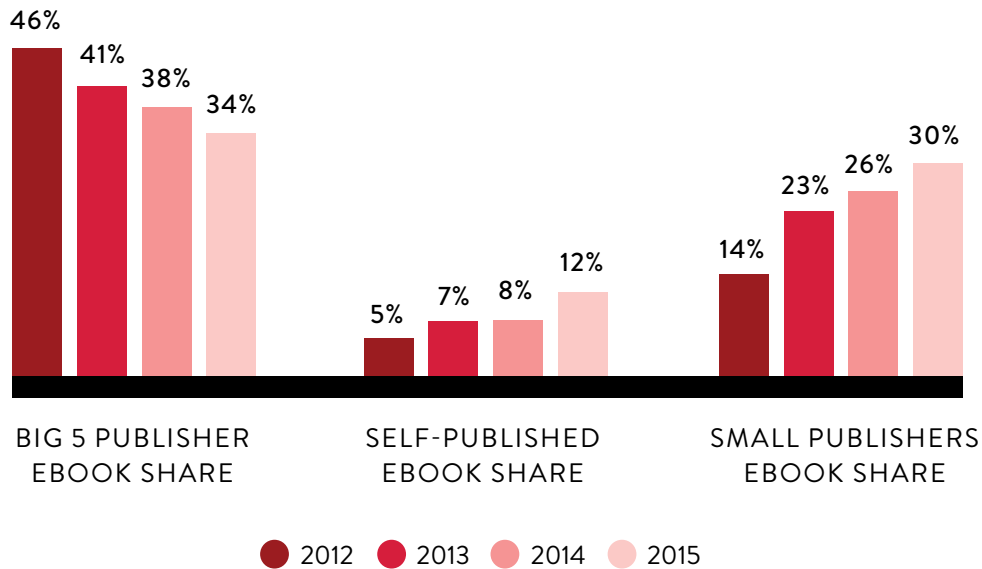


Source: BookScan/PubTrack Digital

SELF PUBLISHER SHARE

According to Books & Consumers, self-published eBooks accounted for 12% of eBook purchases in 2015.

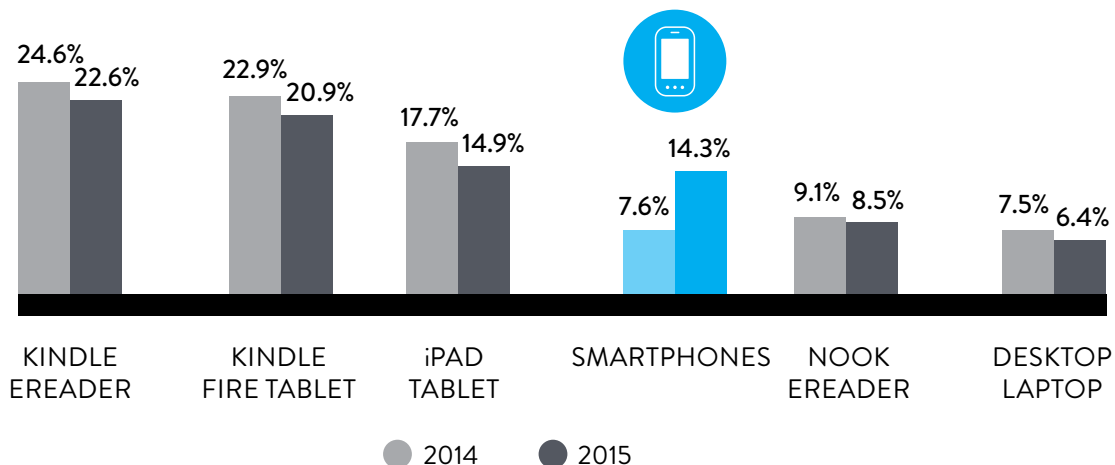
The growth in self-publisher and small publisher eBook share came at the expense of the Big 5 publishers.



Source: Books & Consumers
Based on manual coding of authors/publishers by Nielsen

EREADING DEVICES

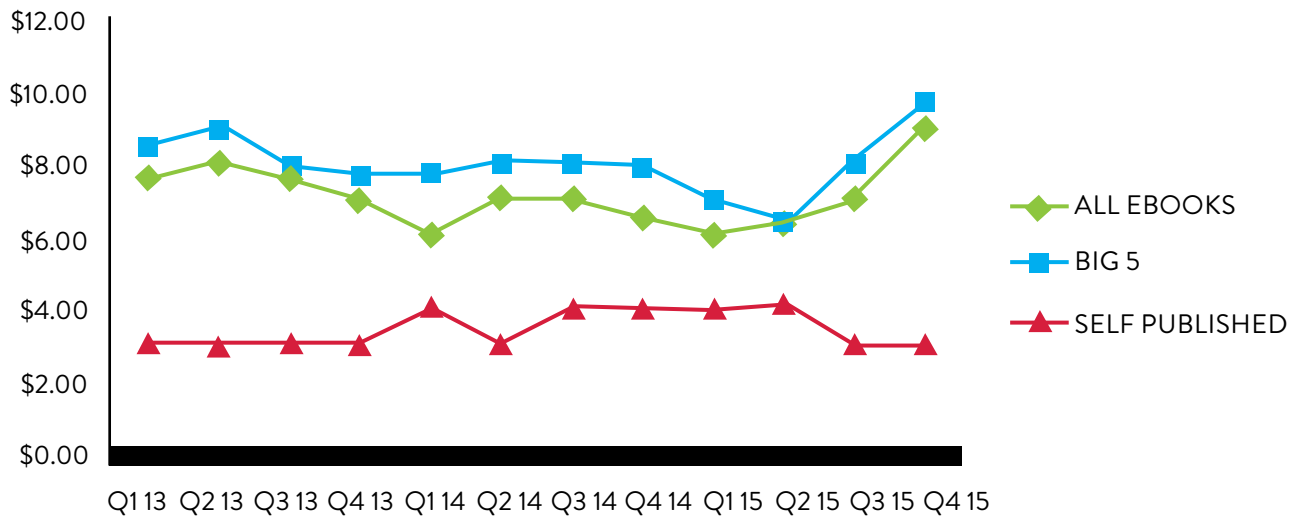
Books & Consumers also shows a notable shift in eBook downloads to smartphones, at the expense of eReaders and Tablets:



Source: Books & Consumers

MEDIAN EBOOK PRICES

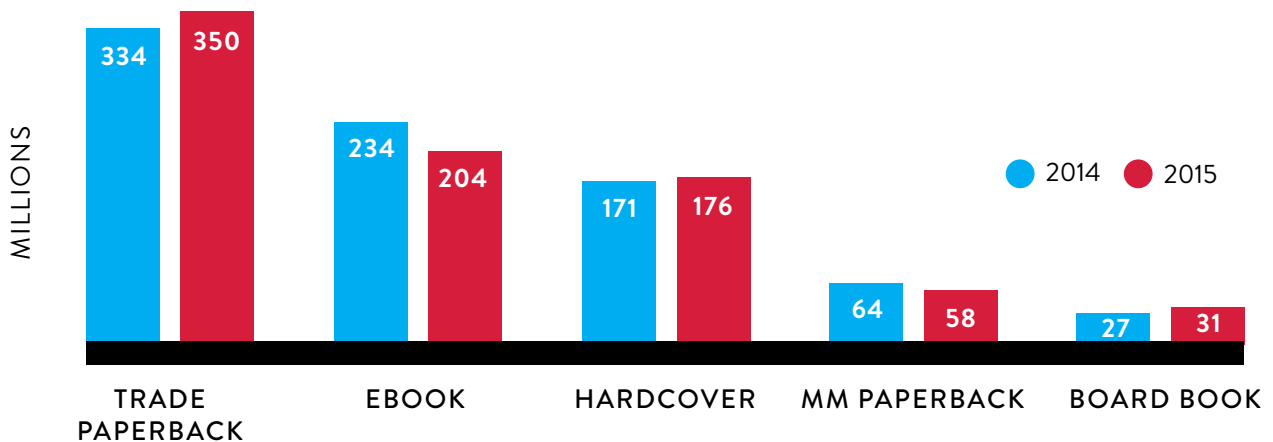
The chart below shows that the median price paid for an eBook, as reported by Books & Consumers' respondents, has increased to nearly \$10 during 2015 as the "Big 5" regained more control over their market pricing. Meanwhile, the price paid for self-published eBooks dropped in recent quarters to a median price of around \$2.50. The rise in prices for traditionally published eBooks has likely propelled the shift toward purchasing self-published eBooks.



Source: Books & Consumers

FORMAT BREAKDOWN

Trade paperback, hardcover, and board books all saw growth in 2015. Board books saw 19% growth in 2015 on 2014.



Source: BookScan/PubTrack Digital

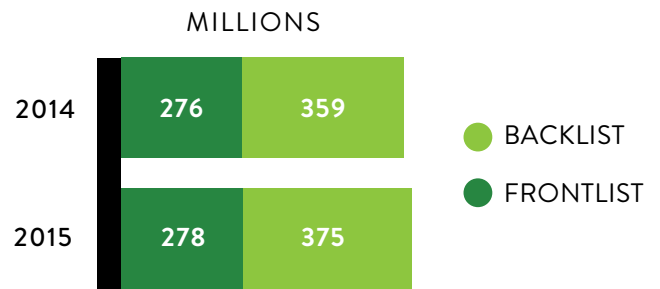
*2015 PT-Digital figures are weighted to reflect panel changes

BACKLIST VS. FRONTLIST

Backlist titles (defined as published more than 12 months in the past) represented 57% of all print book sales in 2015.

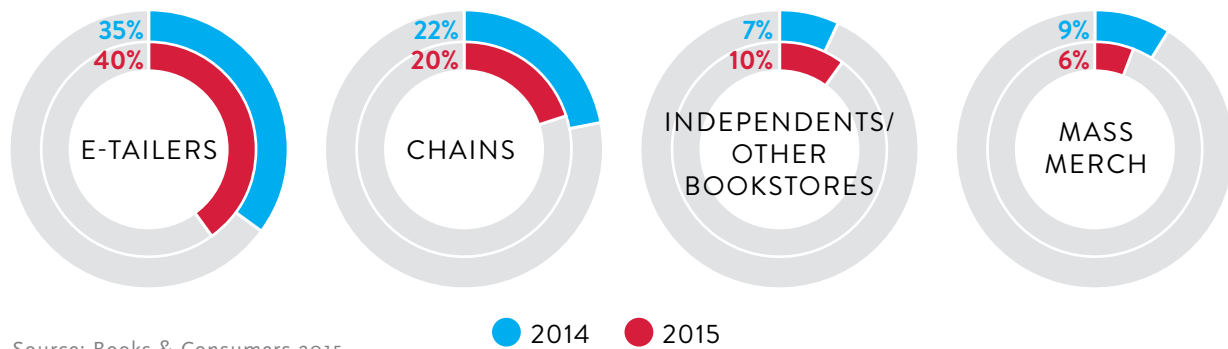
Backlist sales in 2015 grew 4.3% over 2014, compared to flat frontlist sales.

Source: BookScan



CHANNEL BREAKDOWN

Continuing a trend seen in previous years there was a further decline in the unit market share of chains and mass merchandisers while independents and e-tailers grew theirs.

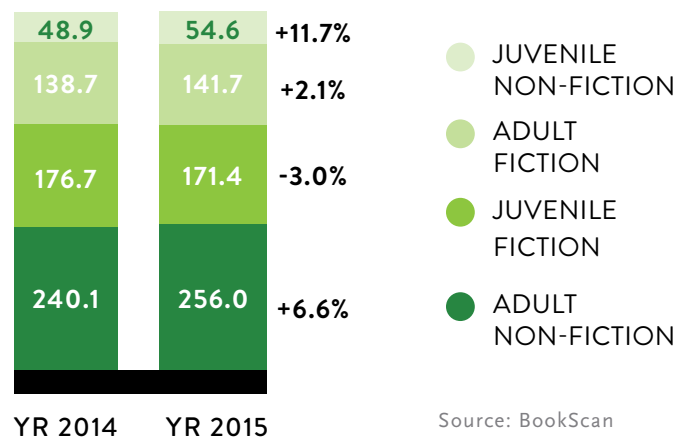


Source: Books & Consumers 2015

CATEGORY TRENDS

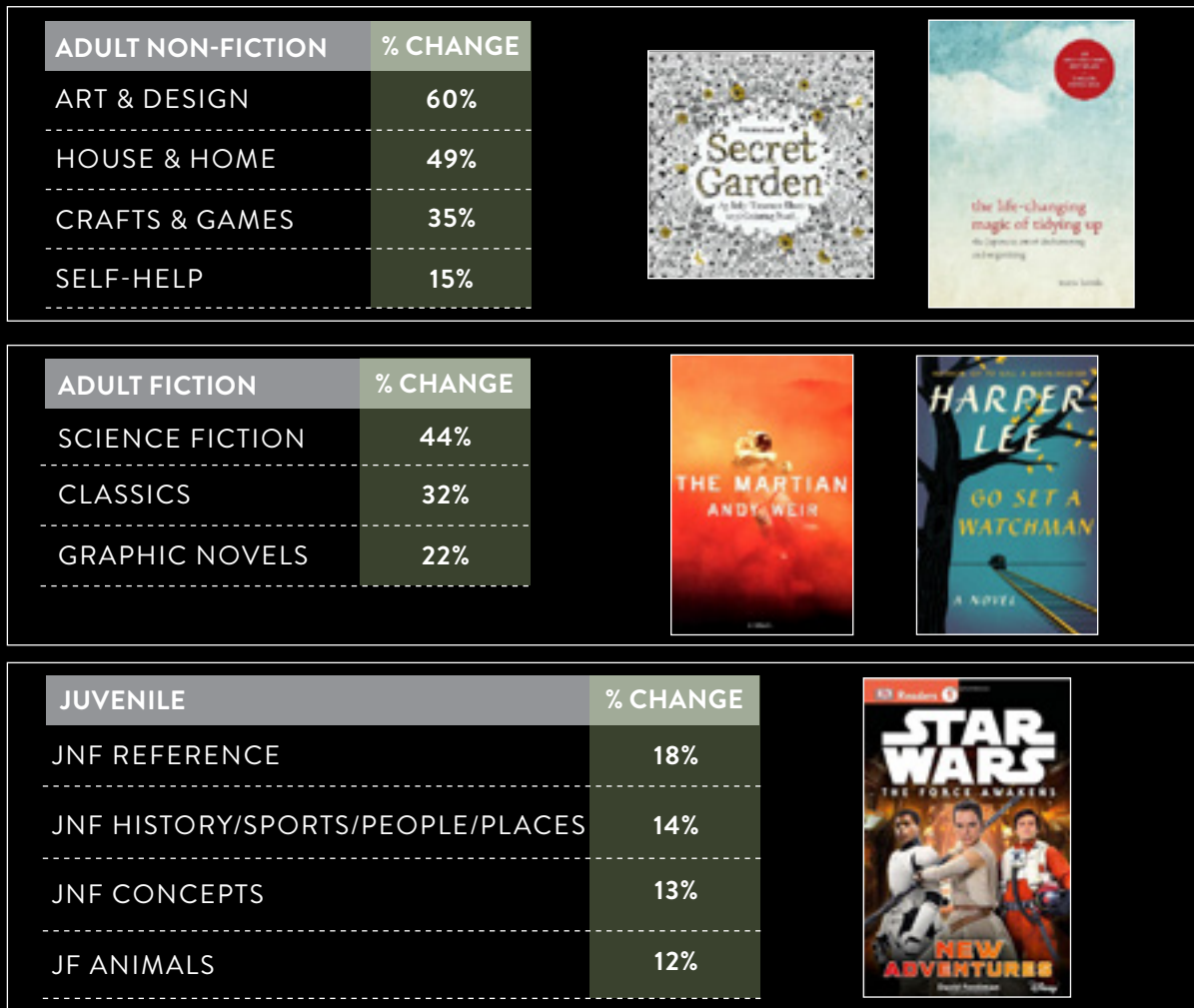
Non-fiction was the highlight of 2015 with 12% growth in children's non-fiction and 7% growth in adult non-fiction.

Juvenile Fiction overall, including Young Adult titles, declined 3% in 2015 due to a wildly successful previous year with brands like John Green, *Divergent* series, and *Frozen* to name a few.



Source: BookScan

GROWING GENRES



Source: BookScan

2015 was the year of Adult Coloring Books:

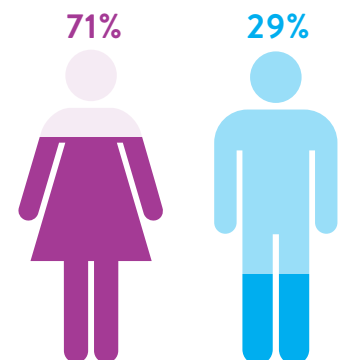
Nielsen BookScan estimates that 12 million copies of coloring books sold in the US in 2015 compared to 1 million in 2014 – and that over 2,000 coloring books were published in 2015 compared to 300 in the previous year. The phenomenon is apparent in the bestseller lists. Two adult coloring books land spots on Nielsen’s 2015 Top 20 bestseller list: Johanna Basford’s *Secret Garden* and *Enchanted Forest* (Chronicle), selling 765,000 copies and 675,000 copies respectively.

Some facts about Adult Coloring book buyers:

According to Books and Consumers, 20% of book buyers in December 2015 had purchased an adult coloring book before.

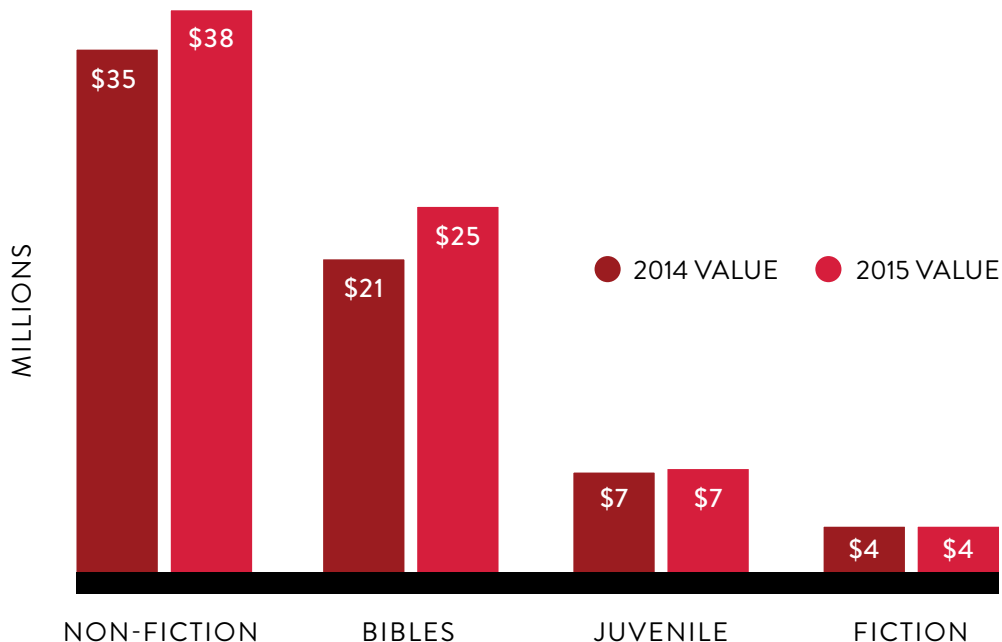
71% of the buyers were women, with the largest representation in the 18-29 age band. Millennials were 29% more likely to buy an adult coloring books as compared to all buyers.

71% OF ADULT COLORING BOOK BUYERS ARE WOMEN



BOOK SALES IN THE CHRISTIAN MARKET

PubTrack Christian – which tracks book sales in Christian retailers exclusively – shows that in that market Christian book sales grew by 9% in value and 10% in volume 2015 from 2014. All categories were up, with the largest value growth in Bibles (+16%) and Non-Fiction (+8%), driven not by a single title but by organic growth across many genres.



Source: PubTrack Christian Retail POS Activity



TOP 20 PRINT BESTSELLERS: OVERALL

#	TITLE	AUTHOR	IMPRINT	PUB DATE	2015 SALES
1	GO SET A WATCHMAN	LEE HARPER	HARPER	7/1/2015	1,599,000
2	DIARY OF A WIMPY KID: OLD SCHOOL	KINNEY JEFF	HARRY N. ABRAMS	11/1/2015	1,484,000
3	GREY	JAMES E. L.	VINTAGE	6/1/2015	1,407,000
4	THE GIRL ON THE TRAIN	HAWKINS PAULA	RIVERHEAD BOOKS	1/1/2015	1,346,000
5	THE LIFE-CHANGING MAGIC OF TIDYING UP	KONDO MARIE	TEN SPEED PRESS	10/1/2014	1,143,000
6	ALL THE LIGHT WE CANNOT SEE	DOERR ANTHONY	SCRIBNER BOOK COMPANY	5/1/2014	1,014,000
7	PAPER TOWNS	GREEN JOHN	SPEAK	9/1/2009	919,000
8	KILLING REAGAN	O'REILLY BILL	HENRY HOLT & COMPANY	9/1/2015	852,000
9	AMERICAN SNIPER	KYLE CHRIS	WILLIAM MORROW & COMPANY	11/1/2014	851,000
10	SECRET GARDEN: AN INKY TREASURE	BASFORD JOHANNA	LAURENCE KING	3/1/2013	765,000
11	FIRST 100 WORDS	PRIDY BOOKS	PRIDY BOOKS	5/1/2011	685,000
12	ENCHANTED FOREST: AN INKY QUEST	BASFORD JOHANNA	LAURENCE KING	2/1/2015	675,000
13	THE MARTIAN	WEIR ANDY	BROADWAY BOOKS	10/1/2014	673,000
14	ROGUE LAWYER	GRISHAM JOHN	DOUBLEDAY BOOKS	10/1/2015	576,000
15	THE PIONEER WOMAN COOKS	DRUMMOND REE	WILLIAM MORROW & COMPANY	10/1/2015	570,000
16	TO KILL A MOCKINGBIRD	LEE HARPER	GRAND CENTRAL PUBLISHING	10/1/1988	563,000
17	THE LONG HAUL	KINNEY JEFF	AMULET BOOKS	11/1/2014	554,000
18	JESUS CALLING	YOUNG SARAH	THOMAS NELSON PUBLISHERS	10/1/2004	545,000
19	THE BOYS IN THE BOAT	BROWN DANIEL JAMES	PENGUIN BOOKS	5/1/2014	532,000
20	STRENGTHS FINDER 2.0	RATH TOM	GALLUP PRESS	2/1/2007	529,000

Source: BookScan

TOP 20 PRINT BESTSELLERS: JUVENILE

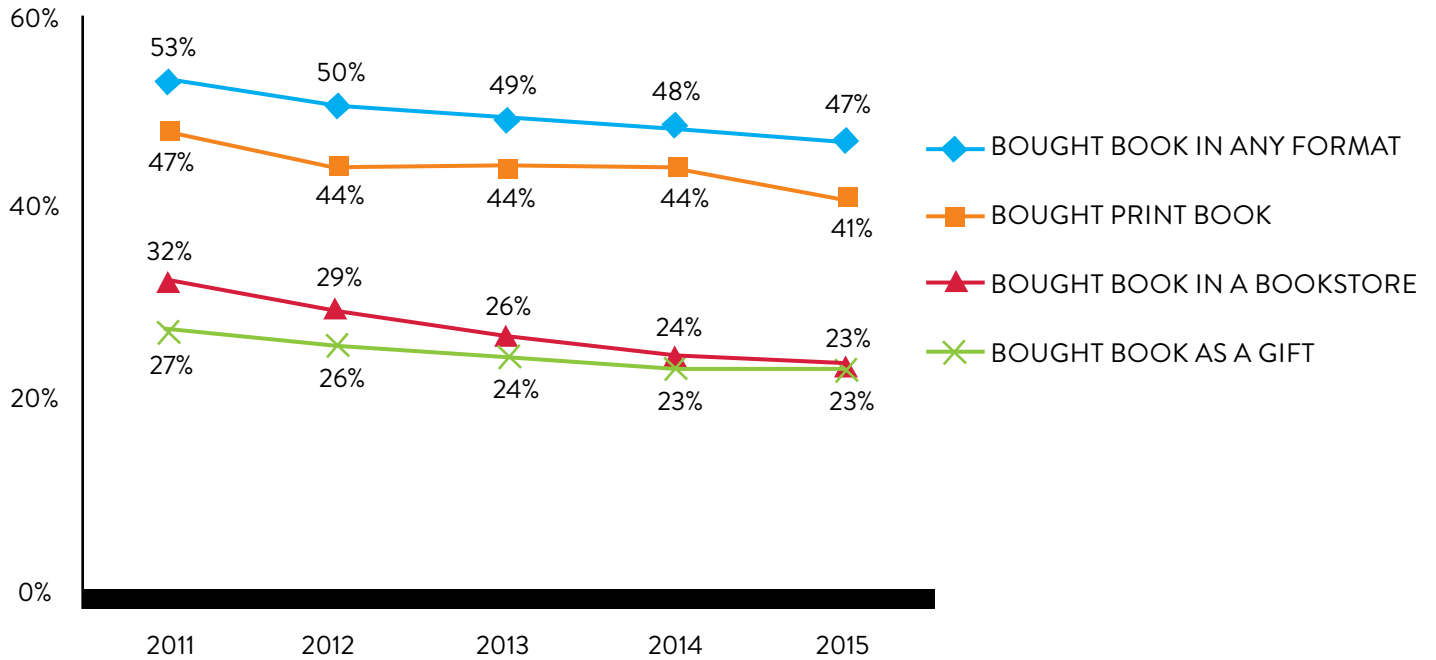
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2	PAPER TOWNS	GREEN JOHN	SPEAK	9/1/2009	919,000
3	SECRET GARDEN: AN INKY TREASURE	BASFORD JOHANNA	LAURENCE KING	3/1/2013	765,000
4	FIRST 100 WORDS	PRIDDY BOOKS	PRIDDY BOOKS	5/1/2011	685,000
5	ENCHANTED FOREST: AN INKY QUEST	BASFORD JOHANNA	LAURENCE KING	2/1/2015	675,000
6	THE LONG HAUL	KINNEY JEFF	AMULET BOOKS	11/1/2014	554,000
7	OH, THE PLACES YOU'LL GO!	DR SEUSS	RANDOM HOUSE CHILDREN'S BOOKS	1/1/1990	521,000
8	THE ISLE OF THE LOST	DE LA CRUZ MELISSA	DISNEY-HYPERION	5/1/2015	493,000
9	LAUGH-OUT-LOUD JOKES FOR KIDS	ELLIOTT ROB	FLEMING H. REVELL COMPANY	8/1/2010	483,000
10	WHAT PET SHOULD I GET?	DR SEUSS	RANDOM HOUSE BOOKS FOR YOUNG READERS	7/1/2015	464,000
11	GREEN EGGS AND HAM	DR SEUSS	RANDOM HOUSE CHILDREN'S BOOKS	8/1/1960	442,000
12	THE VERY HUNGRY CATERPILLAR	CARLE ERIC	PHILOMEL BOOKS	3/1/1994	407,000
13	ONE FISH TWO FISH RED FISH BLUE FISH	DR SEUSS	RANDOM HOUSE CHILDREN'S BOOKS	3/1/1960	401,000
14	GOODNIGHT MOON	BROWN MARGARETWISE	HARPERFESTIVAL	10/1/1991	398,000
15	BROWN BEAR, BROWN BEAR	MARTIN BILL JR.	HENRY HOLT & COMPANY	9/1/1996	392,000
16	LOVE YOU FOREVER	MUNSCH ROBERT N.	FIREFLY BOOKS	9/1/1995	387,000
17	WONDER	PALACIO R. J.	ALFRED A. KNOPF BOOKS FOR YOUNG	2/1/2012	385,000
18	MISS PEREGRINE'S HOME FOR PECULIAR CHILDREN	RIGGS RANSOM	QUIRK BOOKS	6/1/2013	369,000
19	THE DAY THE CRAYONS QUIT	DAYWALT DREW	PHILOMEL BOOKS	6/1/2013	369,000
20	LOOKING FOR ALASKA	GREEN JOHN	SPEAK	1/1/2007	357,000

Source: BookScan

4 READER INSIGHTS

% of Americans buying books

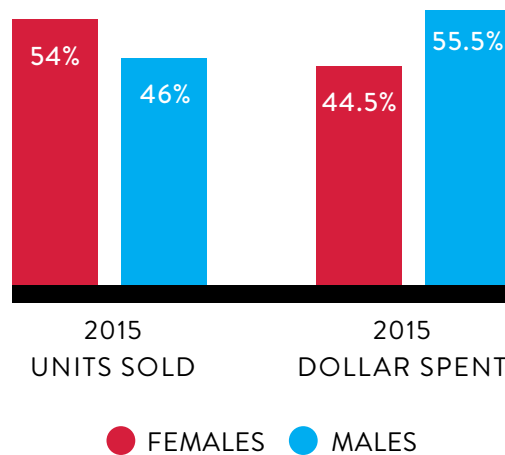
The proportion of Americans who buy books has declined by 6 percentage points since 2011.



Source: Books & Consumers

Gender split of books purchased

While females accounted for a larger percentage of units sold in 2015 (54%), they accounted for a lesser percentage of dollars spent (44.5%). This indicates that men are buying fewer books - but paying more for them.



Source: Books & Consumers

ETHNICITY BREAKOUTS



AFRICAN AMERICANS

102% MORE LIKELY TO BUY CHILDREN'S BIBLE/PRAYER BOOKS

65% MORE LIKELY TO BUY BOOKS AT A SUPERMARKET/DRUG STORE

47% MORE LIKELY TO BUY SOCIAL SCIENCE/SOCIAL ISSUES BOOKS



HISPANIC/LATINO

52% MORE LIKELY TO USE A BOOK SUBSCRIPTION SERVICE

36% MORE LIKELY TO BUY COMICS & GRAPHIC NOVELS

23% MORE LIKELY TO BUY YOUNG ADULT BOOKS



ASIAN-AMERICAN

97% MORE LIKELY TO BUY STM BOOKS (SCIENTIFIC, TECHNICAL, MEDICAL)

49% MORE LIKELY TO USE A BOOK SUBSCRIPTION SERVICE

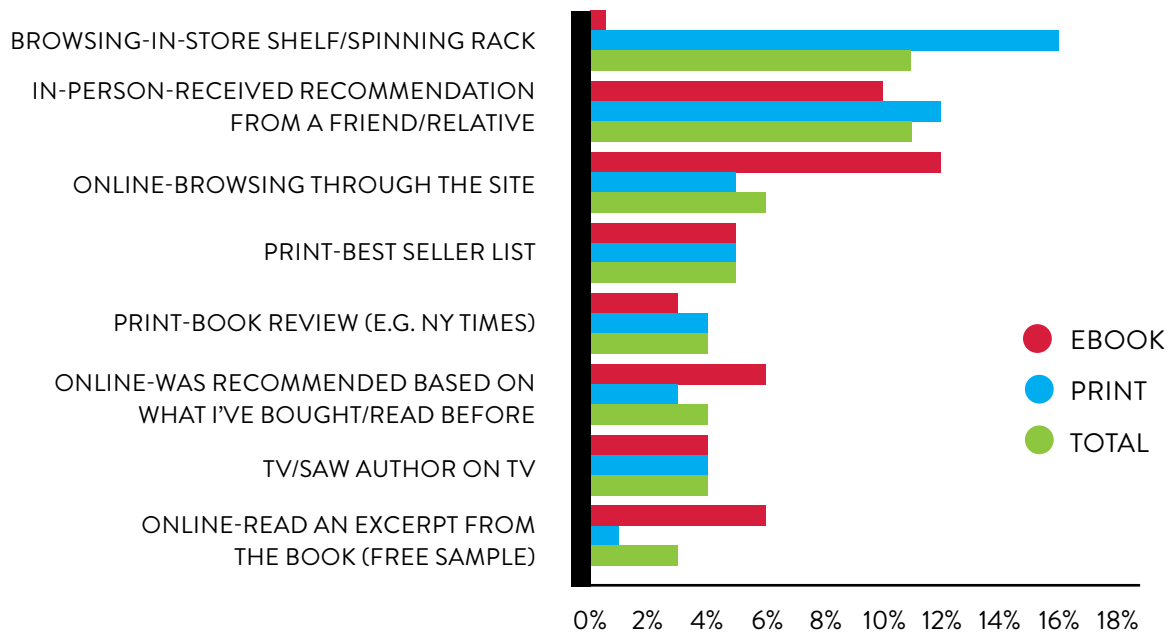
45% MORE LIKELY TO BUY BUSINESS & ECONOMICS BOOKS

Source: Books & Consumers



Book discovery

Browsing in a physical store is the top discovery method for print books and online browsing is the top for eBooks. An in-person recommendation from a friend or relative is the second most influential for both print and eBooks.



Source: Books & Consumers

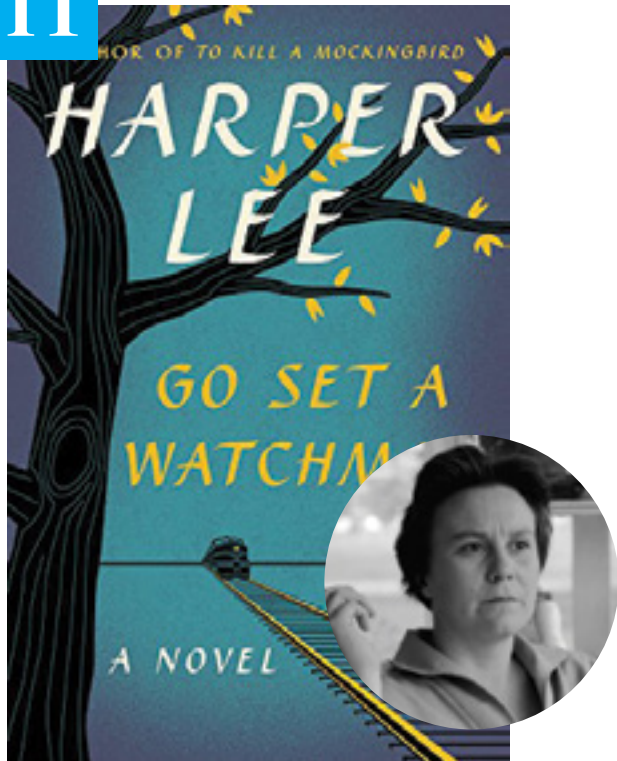
A NOTE ABOUT OUR SOURCES:

BOOKSCAN IS THE BOOK INDUSTRY'S GO-TO SOURCE OF POINT-OF-SALE DATA ON BOOKS PURCHASED. It is the world's first and largest continuous print book sales monitoring service covering 10 markets around the world, including the US and the UK.

PUBTRACK DIGITAL IS THE BOOK INDUSTRY'S COMPANION TO BOOKSCAN FOR THE EBOOK MARKET. It is the book industry's only aggregated eBook analytic tool offering comprehensive, POS data from the top 30 (and growing) digital publishers.

PUBTRACK CHRISTIAN PROVIDES ACCESS TO A COMPLETE VIEW OF THE CHRISTIAN MARKET. It is the leading data warehouse, aggregation and analysis tool set created exclusively for today's Christian publishers and retailers.

BOOKS & CONSUMERS IS THE WORLD'S LARGEST TRACKER OF WHAT BOOK CONSUMERS ARE BUYING AND WHY. It is the premier resource for understanding consumer book buying behavior and gaining actionable insights into how books are discovered and purchased. Further, it provides a vast source of sample for clients to run cutting edge primary research.



TWO AUTHORS:

HARPER LEE'S GO SET A WATCHMAN

Propelled to the best seller list in 2015, this *To Kill a Mockingbird* semi-sequel, is a “home-coming” of sorts for Scout, now grown, who confronts a racist Atticus Finch. This is a book that surprised many readers who grew up on a more noble portrayal of Atticus. Controversy continues to swirl as to whether Harper Lee truly intended this to be published.

PUBLISHED: **July 14, 2015**

24 weeks on the Bestseller List in 2015

1.6 million print unit sales in 2015 (Source: BookScan)

54% of her buyers highly recommend her book

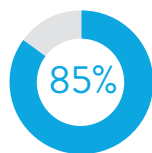


38% Male
62% Female

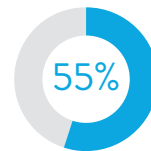


\$64.8K

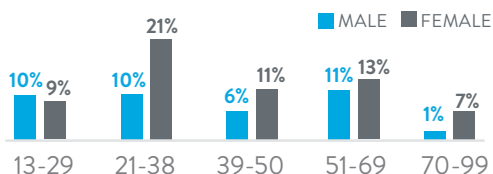
Est Mean HH Income
(7% above average for book buyers)



Planned to buy this book
(15% impulse)

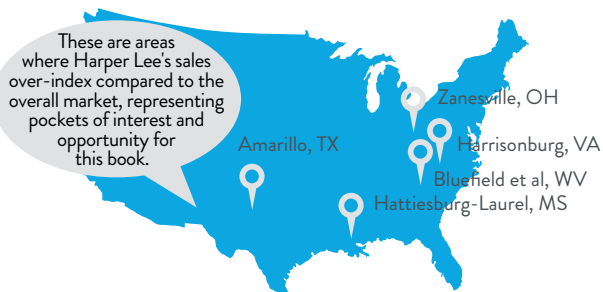


Bought it in a physical store



WHERE ARE HARPER LEE BOOK BUYERS CONCENTRATED?

TOP 5 PERFORMING DMAS



N-SCORE

Nielsen's proprietary measure of “marketability” based on attributes such as awareness, likeability, and influence.

HARPER LEE

Awareness **49**

Likeability **71**

Influence **72**

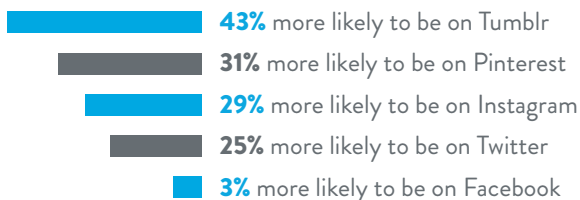
TOTAL (N-SCORE) **74**



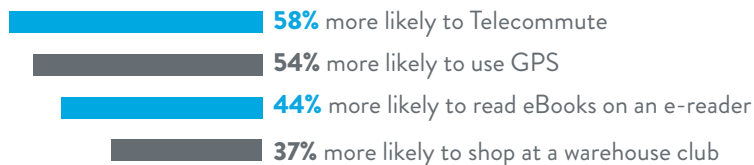
TOP DISCOVERY REASONS

- Book reviews (mainly print)
- Heard about on TV
- Social Network recommendation
- Bestseller

SOCIAL INDICES: COMPARED TO ALL BOOK BUYERS



INDICES: COMPARED TO ALL BOOK BUYERS



A CLOSER LOOK

PAULA HAWKINS' THE GIRL ON THE TRAIN

A mystery/thriller from Britain, this debut novel has taken American readers by storm. The narrator, a London-bound commuter prone to alcoholic blackouts, gets caught up in a murder investigation involving people she had been observing on her journey. The book delivers a plot line with many twists and turns that leaves the reader guessing till the very end.

PUBLISHED: **January 13, 2015**

50 weeks on the Bestseller List in 2015

(Source: BookScan) **1.3 million** print unit sales in 2015

51% of her buyers highly recommend her book



Planned to buy this book
(43% impulse)



Bought it in a physical store



34% Male
66% Female

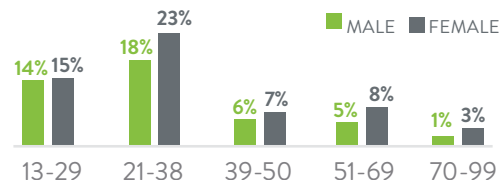


Est Mean HH Income
(17% above average for book buyers)



TOP DISCOVERY REASONS

- Book reviews
- Browsing on online/etailer site
- Bestseller lists
- Retailer recommendation

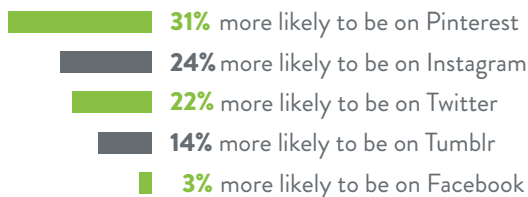


WHERE ARE PAULA HAWKINS BOOK BUYERS CONCENTRATED?

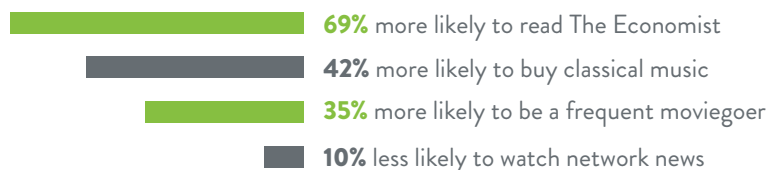
TOP 5 PERFORMING DMAS



SOCIAL INDICES: COMPARED TO ALL BOOK BUYERS



INDICES: COMPARED TO ALL BOOK BUYERS



N-SCORE

Nielsen's proprietary measure of "marketability" based on attributes such as awareness, likeability, and influence.

PAULA HAWKINS

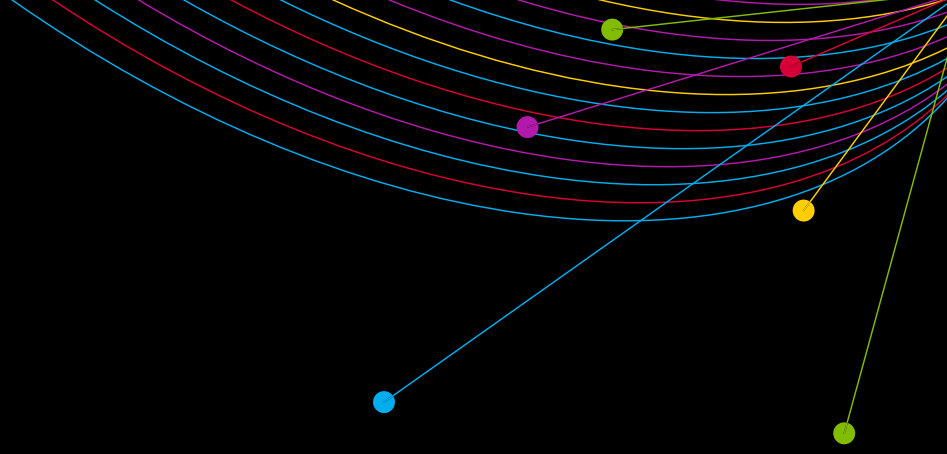
Awareness **9**
Likeability **55**
Influence **26**
TOTAL (N-SCORE) **52**

ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers watch and buy. Nielsen's Watch segment provides media and advertising clients with Total Audience measurement services for all devices on which content — video, audio and text — is consumed. The Buy segment offers consumer packaged goods manufacturers and retailers the industry's only global view of retail performance measurement. By integrating information from its Watch and Buy segments and other data sources, Nielsen also provides its clients with analytics that help improve performance. Nielsen, an S&P 500 company, has operations in over 100 countries, covering more than 90% of the world's population.

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