

Golant Innovation
for creative and social enterprise

 the audience agency



Reading for Pleasure

An Evidence Review

Sophia Woodley and Oliver Mantell

April 2020

Commissioned by Arts Council England

Contents

1	Executive summary	4
2	Introduction	6
3	A nation of readers?	7
	3.1 How many ‘readers’?	7
	3.2 Who are the heavy readers?	7
	3.3 What segmentation exists?	8
4	Why do readers read?	9
	4.1 Making the case for ‘pleasure’	9
	4.2 What are the pleasures of reading?	10
	4.3 Why do people not read?	11
5	Book-buying	13
	5.1 Genres	13
	5.1.1 Fiction	13
	5.1.2 Poetry	14
	5.1.3 Fiction in translation	16
	5.2 Formats	16
	5.2.1 E-books	16
	5.2.2 Audiobooks	21
	5.2.3 Devices	23
	5.2.4 Online reading	23
6	Libraries	25
	6.1 Visits and borrowing in decline	25
	6.2 Library users are diverse	27
	6.3 Genres borrowed	28
	6.4 Formats	29

7	New technologies and their impact	30
7.1	New preferences and choices	30
7.2	New reading habits	31
7.3	New insights: is there a data crisis in publishing?	31
7.3.1	Less data on sales	31
7.3.2	The impact of digital self-publishing	31
7.3.3	More data on reader habits	32
8	What encourages people to read more?	34
8.1	Buying and borrowing vs. reading and finishing	34
8.2	New technologies	35
8.3	Making the case for reading for pleasure	36
8.4	Encouraging reluctant and/or infrequent readers	36
8.5	Encouraging avid readers	38
9	Conclusion	40
10	Recommendations for further research	41
Appendix A: Are library statistics reliable?		42
Bibliography		43

1 Executive summary

- Reading for pleasure is widespread (63% of the adult population¹) but reducing. ‘Heavy’ buyers of fiction are in a minority (c.10% buying 16+ books a year) and more likely to be: older; female; with higher educational qualifications; from professional/managerial occupations; with higher than average incomes; now retired.
- Heavy readers read a wider range of genres and are also more likely to engage in other forms of culture like visiting galleries/museums.
- Pleasure is a key motivation for reading but takes a wide range of forms (e.g. including relaxation, inspiration, identity development, perspective and horizon broadening, escapism, stimulation and reflection). Those who don’t read mostly say that they don’t enjoy it (more specifically that it is hard work, boring, anti-social, they have been put off at school and/or they find it exclusive and presented in unwelcoming ways).
- Fiction sales have plateaued, following a peak in 2010. Poetry sales have grown recently (up 66% from 2013-18), largely due to ‘Instapoets’. Fiction in translation is a small part of the fiction market (3.5% of titles) but sells better per title than English-language fiction (a total of 7% of sales) and is growing (almost doubling from 2001-2015).
- E-book sales peaked in 2014 and have subsequently fallen back. The proportion of sales in e-book compared to printed book vary substantially by genre (with sales of poetry and literary fiction mainly in print; historical fiction, crime, sci-fi, and romance/erotica mainly in e-books).
- Audiobook is the fastest growing part of the market (up c. 150% between 2013 and 2017) and reaches a different profile of reader (who are more likely to be male, 18-44, BAME and in full-time employment than purchasers of other formats).
- Library visits and borrowing are in a long-term decline, particularly among avid readers, however library users are more diverse than many other types of cultural attenders. The gap between the usage levels of upper and lower socio-economic groups decreased until approximately 2014/15, after which it grew again².

¹ Taking Part 2017/18

² Since the proportion of those in higher socio-economic groups, which is higher, had been reducing at a faster rate than the proportion of those in lower socio-economic groups, but then leveled off from around 2014/15, while usage by lower socio-economic groups has continued to fall); Taking Part 2018/19.

- There is a wide range of programmes designed to encourage reading by reluctant, infrequent or avid readers, but there is room for more robust and consistent measures of their impact.
- There is a broad range of useful evidence about reading behaviours (and commercial information about book sales) however there is most evidence about literacy and commercial sales in traditional formats. It would be useful to have more evidence, which:
 - o is in a clear, consistent and public format
 - o is about general readers
 - o is about reading in online, e-book and audiobook formats (especially online short story readership)
 - o covers the growing self-publication market
 - o is at a level of detail below top-line genres
 - o covers library e-book borrowing
 - o evidences the impact of specific reader development interventions in a comparable format.

2 Introduction

With major changes around the technologies of reading, library funding, and the book sales ecosystem, this is an important time to understand the patterns, habits and motivations around reading for pleasure in England. We were commissioned by Arts Council England to deliver an evidence review intended to:

- Assess the robustness of existing evidence and highlight specific gaps in knowledge that may indicate a need for additional research
- Benchmark the current state of play and provide a basis for considering the impact of future interventions
- Enable Arts Council England to push forward with demonstrably successful approaches to reader development and influence reading for pleasure habits amongst the public

Scope of the study

The following scope and definitions were provided within the contract with Arts Council England:

- A review of research over the last (approximately) five years, covering reading for pleasure and reader development for adults, particularly in relation to literary and translated fiction, and poetry.

By reader development, we mean:

- Increasing reading (for pleasure) consumption amongst existing readers in a measurable way.
- Working to move a group of readers from existing habits and preferences to exploring writers or genres new to them; with a particular interest in introducing readers to literary fiction, poetry, short stories or literature in translation.
- Encouraging reading amongst groups, of any age, who do not habitually read at all, or are reluctant readers.

3 A nation of readers?

3.1 How many ‘readers’?

Reading for pleasure is widespread, but infrequent and reducing. By the most standard definition, a ‘reader’ is someone who has read a book for pleasure over the past year.³ By this measure, only 63% of English adults in 2017/18 could be considered ‘readers’ according to the DCMS Taking Part survey, a decrease from 68% in 2012/13.⁴ In 2016/17, 12% of English adults engaged with literature through book clubs, literary events, or writing themselves – a percentage that has increased since 2010.⁵

On the other hand, according to the Literacy Trust, “1 in 6 (16.4% / 7.1 million people) adults in England have very poor literacy skills.”⁶ While these adults may also be readers, they are also likely to require more targeted support to encourage them to engage with books and literature.

3.2 Who are the heavy readers?

Only 10% of adults in 2018 were heavy buyers of fiction, according to Nielsen. This number has remained steady since at least 2014.

A heavy or frequent reader is generally considered to read more than 10-20 books per year,⁷ and Nielsen defines heavy book-buyers as those who buy more than 16 books per year. Although buyers may not read all they buy and readers may not buy all of their books new (or indeed buy them at all), Nielsen’s data on the demographics of heavy book-buyers are the best way of understanding this segment of the market.

What do we know about this enthusiastic 10%? Heavy buyers of fiction are more likely to be older women – rising to 19% of

³ This is the most widely accepted benchmark for entry into the class of ‘readers,’ used by the DCMS Taking Part survey, as well as the 2017 Macquarie University research on reading habits in Australia and the ongoing Pew Research Center research in America.

⁴ National Statistics, *Taking Part 2017/18* (DCMS, 2019). Other estimates range from 74% for Britain to 51% for the UK. Mintel Press Office, ‘Great Expectations for UK Book Sales’ (2017). Kirsty Cooke, ‘51% of UK adults read a book in the last year’ (Kantar UK Insights, 2019).

⁵ National Statistics, *Taking Part 2016/17: LITERATURE*.

⁶ <https://literacytrust.org.uk/information/what-is-literacy/>

⁷ Kirsty Cooke, ‘Are people still reading physical books?’ David Throsby, Jan Zwar and Callum Morgan, *Australian Book Readers: Survey Method and Results* (Macquarie Economics Research Papers, 2017).

Pew Research Centre, *Reading Habits in Different Communities* (2012).

One dramatic outlier is Booktrust’s 2013 research on the reading habits of adults in England. This offers a detailed segmentation of readers (for more discussion see below) with averages for each segment. Yet even the ‘Reluctant Readers’ segment reads one or two books a month – putting them into the ‘heavy’ or ‘frequent’ reader category by most other measures – and those in the ‘Bookworms’ segment, the most enthusiastic about reading, gets through as many as 12 books a month. The reasons for this extreme divergence are not at all clear, in part because the Booktrust research doesn’t give its topline results for average numbers of books read by its respondents.

women between 55 and 84. They are more likely to have higher educational qualifications, to be from professional and managerial occupations, as well as slightly more likely to have a higher income. They are less likely to be in full time employment: retired people are unsurprisingly more likely to be heavy fiction-buyers, as are those who are 'looking after the home' (in Nielsen's phrasing) while unemployed people equal the population as a whole in their likelihood to be heavy buyers of fiction. People without children under eighteen are also more likely to be heavy buyers.

Heavy book buyers (of any genre) are much more likely to read general literary fiction – 38% as opposed to 21% of the population as a whole. They are eclectic readers, far more likely to read a wide range of genres. They're also more likely to engage in several other forms of culture. For example, 47% visited a gallery/museum in the past year, as opposed to 34% of all book buyers.

3.3 What segmentation exists?

Currently there is no common audience segmentation for book-buyers or readers. Publishers look to Nielsen for data on the market, but tend to develop a segmentation model for internal use rather than looking towards an industry standard.

A detailed segmentation was created by Booktrust in 2013, breaking down English readers into nine segments distinguished by reading habits, frequency, attitudes and 'history' (for example, whether their parents encouraged them to read).⁸ However, this doesn't appear to have been widely adopted.⁹

The Audience Agency's Audience Spectrum segments the population by their engagement in, and attitudes towards, culture.¹⁰ It is one of the most widely used segmentations in the English arts, culture and heritage sector. A recent report by The Audience Agency for Arts Council England, *Evidencing Libraries' Audience Reach*, used Audience Spectrum segmentation to understand library users (based on submitted postcode data from 14 library services across England). This provided an effective way of understanding whether library users are representative of the population at large, and of comparing them with attenders for other types of culture.¹¹ However, Audience Spectrum segments do not currently include any specific references to reading for pleasure (frequency, habits, attitudes, tastes).

⁸ Alasdair Gleed, *Booktrust Reading Habits Survey 2013* (Booktrust, 2013), p. 6.

⁹ As discussed above, the main concern with this segmentation is the very high reading frequency (in terms of books per month) compared with the other categorisations available.

¹⁰ <https://www.theaudienceagency.org/audience-spectrum>

¹¹ Katie Cudworth and Jacqui Fortnum, *Evidencing Libraries Audience Reach: Research findings and analysis* (Arts Council England, 2017).

4 Why do readers read?

4.1 Making the case for ‘pleasure’

Beyond its many instrumental benefits, it’s important to remember the importance, and varieties, of pleasure within ‘reading for pleasure’. If we want to encourage reading for pleasure, we first have to understand more specifically what motivates readers to read. Yet here we face an interesting issue. As Sam Duncan points out:

The pleasures of RfP [Reading for Pleasure] have... been identified.... These are varied and complex joys, and unambiguously valuable. The word ‘pleasure’ itself, however, is more ambiguous. It often connotes sensual pleasure, or appetite, and frequently carries connotations of indolence, or at least a lack of ‘seriousness’ or attention to ‘things that matter’. The word ‘pleasure’ is therefore not an obvious signal for the potentially intellectual, political, educative pleasures outlined above. This means that the nature and value of the reading practices referred to by the label ‘Reading for Pleasure’ is hidden from those who are not already ‘in the know’. This has implications for access, cultural participation and reading identity.¹²

The vast majority of research on reading for pleasure is focused on proving its positive outcomes, particularly for children and young people. In recent years the arts and culture sector has come to focus more and more on making the case for the provable, extrinsic value of arts and culture. For example, for The Reading Agency, reading for pleasure sits within a framework of outcomes: health and wellbeing, intellectual, personal and social, leading to wider cultural, economic and societal impacts.¹³ Demos has gone so far as to argue that “it is no exaggeration to say that reading can transform British society.”¹⁴

Yet even when other outcomes are sought from reading, motivation is central, as BOP Consulting argued in 2015 in a literature review for the Reading Agency on *The impact of reading for pleasure and empowerment*:

¹²Sam Duncan, *Understanding Reading for Pleasure for emerging adult readers* (National Research and Development Centre for Adult Literacy and Numeracy, 2010).

¹³<https://readingagency.org.uk/news/blog/reading-outcomes-framework-toolkit.html>

¹⁴Sacha Hilhorst, Alan Lockey and Tom Speight, *A Society of Readers* (Demos, 2018), p 10.

A key theme that came through the research was the centrality of enjoyment of reading as a prerequisite for the other outcomes of reading to be achieved. Indeed, it was clear that attention must be paid to how individuals are motivated to read so that programmes seeking to bring about additional outcomes are best designed and targeted.¹⁵

Summarising the literature on both children and adults, Margaret Merga makes the case that “intrinsic motivation is felt to be a better predictor of reading... as extrinsic motivation may be more likely to result in a small or even negative impact.”¹⁶ Therefore it is crucial that we do not discount the power of pleasure.

4.2 What are the pleasures of reading?

While research so far is limited,¹⁷ it is clear that there are many and varied pleasures of reading for adults. Summing up the literature, Duncan suggests that they include “pleasures of entertainment and escape; pleasures of cognitive work and narrative creation; pleasures of emotional stimulation, empathy and intersubjectivity; pleasures of ethical contemplation: the ‘should and could’ of reading; and finally, pleasures of companionship.”¹⁸ Based on his own research with adult reading groups in London, he argues that “the pleasures and benefits of RfP are largely based on different forms of what could be called ‘connectedness’.”¹⁹

The Reader sees engagement with literature through shared reading as a “multilayered and humanising” experience, creating communities that offer “a small model of an alternative human society” and allowing “personal contemplation... in areas of experience and meaning otherwise difficult to locate, recover or talk about without reductiveness of meaning.”²⁰

Other research points to pleasures including identity development, perspective and horizon broadening, escapism, stimulation, reflection, inspiration and relaxation – but pure enjoyment is almost always near the top of the list.²¹ A survey of New Zealanders found “few differences between those

¹⁵ BOP Consulting, Literature Review: *The impact of reading for pleasure and empowerment* (The Reading Agency, 2015).

¹⁶ Margaret Kristin Merga, ‘What motivates avid readers to maintain a regular reading habit in adulthood?’ *Australian Journal of Language and Literacy*, Vol. 40, No. 2 (2017).

¹⁷ BOP Consulting, Literature Review: *The impact of reading for pleasure and empowerment*, p. 12.

¹⁸ Sam Duncan, *Understanding Reading for Pleasure for emerging adult readers*, p 5.

¹⁹ *Ibid*, p 18.

²⁰ The Reader, *Cultural Value: Assessing the intrinsic value of The Reader Organisation’s Shared Reading Scheme*, p 43.

²¹ David Throsby, Jan Zwar and Callum Morgan, *Australian Book Readers: Survey Method and Results*. Margaret Kristin Merga, ‘What motivates avid readers to maintain a regular reading habit in adulthood?’ Horizon Research Limited, *Book Reading in New Zealand* (New Zealand Book Council, 2018). Alasdair Gleed, *Booktrust Reading Habits Survey 2013*

who read fiction, poetry or non-fiction,” although “poetry readers were more likely than others to be reading for spiritual enrichment.”²²

There is some evidence about the specific pleasures of reading compared to social media. Recent research by Demos has found that:

When it comes to relaxation, almost half (46%) of UK adults find it relaxing to read a book, while only 10% find it relaxing to read social media. Similarly, 46% of the public find reading books enjoyable, compared to 19% saying this about social media... Reading social media content... makes people feel more connected to the world than reading books; 19% say they feel engaged with the world when reading social media, compared to 8% saying this when reading a book. This gives an indication that books are used more for escapism and relaxation, while social media is used more for its utility.²³

4.3 Why do people not read?

For most people, lack of time is the main obstacle keeping them from reading more.²⁴ This is particularly the case for lapsed readers.²⁵ However, there is always the question of what people choose to spend time on – would more people have time for reading if they valued it more highly than other leisure activities? Why do other choices win out?

For non-readers, reasons are likely to be different. It is from this group that we can expect to see responses like “reading is hard work,” “I find reading boring,” or “I was put off reading at school.”²⁶

Fundamentally, non-readers don’t enjoy reading – 55% of respondents to a QuickReads survey agreed with this.²⁷

Qualitative research for the National Year of Reading (2008) and Harper Collins highlighted cultural barriers to reading among nine families in groups C2, D and E:

In the highly competitive leisure zones that characterise the home (big-screen TV, internet, tabloid news, DVD

²² Horizon Research Limited, *Book Reading in New Zealand* (New Zealand Book Council, 2018).

²³ Andrew Gloag and Alan Lockey, *Quality Control: Reading, Publishing and the Modern Attention Economy* (Demos, 2019), p. 22.

²⁴ Quick Reads, *Reading Between the Lines: the Benefits of Reading for Pleasure* (Quick Reads, 2015).

²⁵ Alasdair Gleed, *Booktrust Reading Habits Survey 2013*

Quick Reads, *Reading Between the Lines*.

²⁶ *Ibid*

Alasdair Gleed, *Booktrust Reading Habits Survey 2013*

²⁷ Quick Reads, *Reading Between the Lines*.

movies) books are seldom seen – indeed they are alien... the world of books is seen as unwelcoming to the outsider. Books are associated with hard work in school, seen as unattractive unopened objects – and to an extent anti-social. Reading (and this not just a point about books) is an individual activity, in the main... It is not that they do not aspire to a more privileged world of reading. It is more that they see reading as for people 'who don't know how to live'; they do not aspire to be like them.²⁸

One of the more interesting and potentially addressable findings of this research centres on the obstacle of book selection:

The codes and references that set out where books are to be found and that define their contents are off-putting to those who do not use book stores and libraries regularly. (In the survey, the shop most visited was one of the most accessible on the high street, WHSmith). For some in the survey, entering a bookstore is like entering a party where you don't know anybody. It's acutely anxiety-inducing.²⁹

Supermarkets and high street shops are becoming less important sites for book-buying, as the market polarizes between online shopping and dedicated bookshops.³⁰ This National Year of Reading/HarperCollins research suggests the potential impact that this might have on less habitual readers. 'Discoverability' of their products is a major issue of concern for many publishers, and this is only likely to become more of an issue as the market polarizes further.

²⁸ Andrew Thomson, *Reading: the Future* (National Year of Reading).

²⁹ Andrew Thomson, *Reading: the Future*.

³⁰ Nielsen communication

5 Book-buying

5.1 Genres

5.1.1 Fiction

Book sales in the UK can fluctuate significantly from year to year, driven by the prominence (or lack) of big bestsellers. Looking at general fiction, the Canelo report commented in 2017 that ‘the past 15 years have been a turbulent ride.’³¹

Because of this turbulence, it’s easy to draw the wrong conclusions when taking a short-term view. Therefore this research looks back over twenty years to see the long-term trends. Nielsen BookScan data, which covers print sales only, shows that fiction’s share of the book market has plateaued after a peak in 2010. Similarly, adult fiction sales have plateaued after a major drop from a high in the years 2008-2010.

Figure 1: Volume of adult fiction sold (Nielsen sales data)

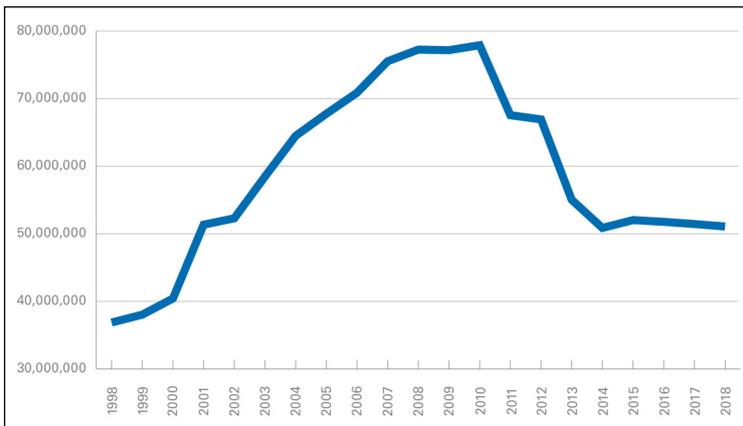
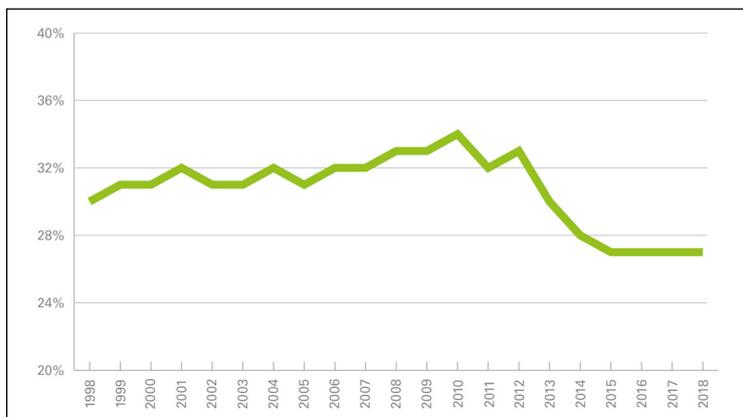


Figure 2: Fiction share of the book market by volume (Nielsen sales data)



³¹ Canelo, *Literature in the 21st century* (Arts Council England, 2017).

How much of this decline in sales of print books is due to the impact of ebooks? Ebook sales took off in the period 2008 – 2012, the same period in which we see a dramatic fall in sales of adult fiction in print. Therefore it seems likely – although not certain – that much of what we are seeing is a shift in format rather than an overall decline in sales.

Looking at Nielsen Books & Consumers data – which covers all formats of books – we see that since 2014, sales of adult fiction as a percentage of books bought have remained broadly stable, while the share represented by general fiction has decreased slightly.

(% of books bought)	2014	2015	2016	2017	2018
<i>Total adult fiction</i>	46	46	44	45	45
General Fiction	16	15	13	13	13
<i>Of which: Literary/classic fiction</i>	6	6	5	5	5

Between 1998 and 2018, Nielsen BookScan data shows that literary fiction represented 40% of general fiction sales in print – but this has increased in more recent years, to 50% in 2017 and 48% in 2018. This is possibly a reflection of the fact (discussed in more detail later) that literary fiction is more likely to be read in print than on ebooks.

5.1.2 Poetry

From the evidence of the past, it would be easy to see poetry as a niche market without an obvious route towards mass appeal. In 2013, only 2% of Booktrust respondents chose poetry as a genre they enjoyed.³² British Library Public Lending Right data groups poetry in with classics, plays and literary criticism as ‘Literature and Literary Studies,’ but even this broad category could only muster 0.4% of library issues in 2015/16.³³

Despite the fact that it is a mature market, things can change quickly in the world of literature. Looking at up-to-date sales numbers is crucial, because sales of poetry increased by 66% in the UK between 2013 and 2018 (albeit from a small base).³⁴

³² Alasdair Glead, *Booktrust Reading Habits Survey 2013*

³³ <https://www.bl.uk/plr/loans-by-category-archive>

³⁴ Natasha Onwuemezi, ‘Poetry sales are booming, LBF hears,’ *The Bookseller* (2018). An even greater leap in interest can be seen in other countries. In Canada, print poetry sales increased by 79% in 2016. Poetry’s share of the print book market went from 0.14% in 2012 to 0.37% in 2016. Booknet Canada, ‘Print poetry sales grew by 79% in 2016,’ (press release, 2017). In the United States, poetry sales doubled between 2016 and 2017, according to NPD BookScan. John Maher, ‘Can Instagram Make Poems Sell Again?’ *Publishers Weekly* (2018).

What was the reason for this sudden leap in sales? The answer is the influence of the ‘Instapoets,’ a new generation of poets who became known on social media platforms like Instagram before making the leap into print. According to NPD BookScan, nearly half of all poetry sales in the United States in 2017 can be attributed to “Instapoets,” representing most but not all of the total increase in sales.³⁵ In the UK, Instagram star Rupi Kaur “sold more copies than the rest of the top 10 poets combined.”³⁶ She has over 3 million followers worldwide on Instagram.³⁷ The popularity of the Instapoets does seem to have led to a wider demand for poetry, at least in some markets – all but one (US) publisher contacted by Publishers Weekly said that they had seen the impact on their sales.³⁸

In the United States, thanks to the National Endowment for the Arts Survey of Public Participation in the Arts (a survey of nearly 30,000 adults conducted in partnership with the U.S. Census) we can see this increased interest in poetry from the side of the reader.

Percent who read poetry in the last year	
1992	17% ³⁹
2002	12.1%
2008	8.3%
2012	6.7%
2017	11.7%

And the effect was strongest amongst young people: the number of 18-24 year olds reading poetry more than doubled. This made them the most avid readers of poetry in the population, with 17.5% having read poetry in the past year.⁴⁰

No direct comparison of reading trends appears possible for England. However, a note of caution is available from Nielsen Books & Consumers data: even in 2018, after the poetry boom, less than 1% of books purchased were poetry.

³⁵ “Instapoets Rekindling U.S. Poetry Book Sales, The NPD Group Says,” (NPD Group press release, 2018)

³⁶ Rob Walker, “‘Now it’s the coolest thing’: rise of Rupi Kaur helps boost poetry sales,” *The Guardian* (7 October 2017).

³⁷ <https://www.instagram.com/rupikaur/>

³⁸ John Maher, ‘Can Instagram Make Poems Sell Again?’

³⁹ Christopher Ingraham, ‘Poetry is Going Extinct, Government Data Show,’ *Washington Post* (24 April, 2015).

⁴⁰ Arts Data Profiles, statistical tables <https://www.arts.gov/artistic-fields/research-analysis/arts-data-profiles/arts-data-profile-18>

5.1.3 Fiction in translation

Research commissioned by the Man Booker Prize from Nielsen Books in 2016 found translated fiction to be in surprisingly good health:

the proportion of translated fiction published remains extremely low at 1.5% overall and 3.5% of literary fiction. However, in terms of sales, fiction punches well above its weight with translated fiction providing 5% of total fiction sales in 2015 and translated literary fiction making up 7% of literary fiction sales in 2015. On average, translated fiction books sell better than books originally written in English, particularly in literary fiction.⁴¹

It continued:

The translated fiction market is rising, against a stagnating general fiction market. In 2001 51.6 million physical fiction books were sold, falling to 49.7 million in 2015. However translated fiction rose from 1.3 million copies sold a year to 2.5 million. In the literary fiction market, the rise was from 1 million copies to 1.5 million.⁴²

This is perhaps less surprising when one reflects that many works of translated fiction were already bestsellers in their home countries. Of the top 10 translated literary fiction titles in 2015, 3 of them were Elena Ferrante novels, representing just under 200,000 sales. Looking more broadly at translated fiction, Nielsen comments that: "We may hear a lot about Scandi crime novels coming to the UK, but modern & contemporary fiction is actually the leading BIC code within translated titles, followed by crime & mystery."⁴³

5.2 Formats

5.2.1 E-books

A few years ago it seemed that the rise of the e-book was unstoppable, with people beginning to wonder whether 'dead tree books' were becoming a thing of the past. Yet news stories in 2017 discussed a dramatic fall in e-book sales in both the UK and the United States, with the Guardian announcing that '*Screen fatigue*' sees UK ebook sales plunge.⁴⁴ Only 17% of UK adults bought an ebook in 2018. This figure has dropped every

⁴¹ Man Booker Prize, 'First research on the sales of translated fiction in the UK shows growth and comparative strength of international fiction' (2016).

⁴² *Ibid.*

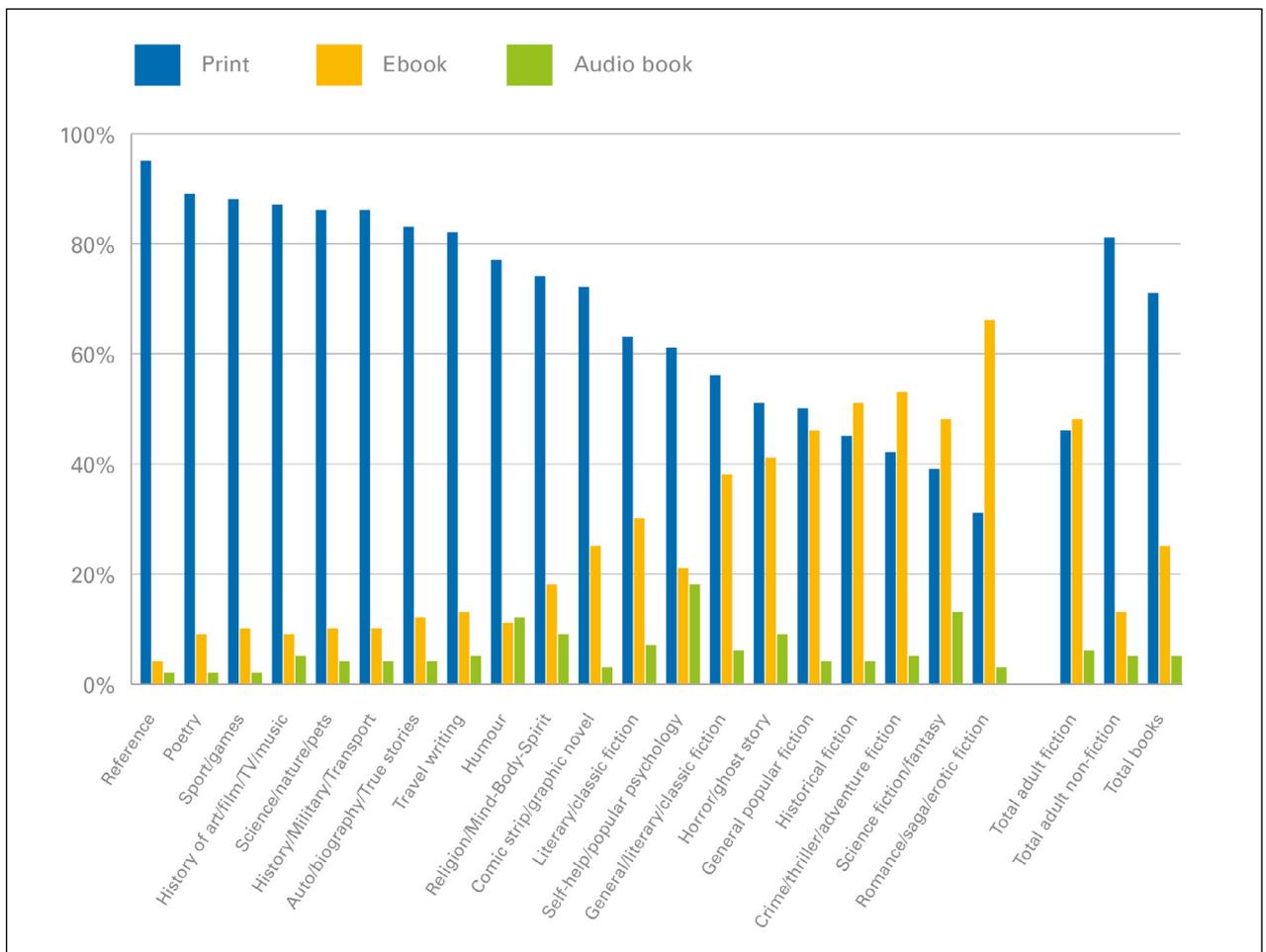
⁴³ Jaclyn Swope, 'Translated fiction in the UK: The stats,' *BookMachine* (2017).

⁴⁴ Mark Sweney, "'Screen fatigue' sees UK ebook sales plunge 17% as readers return to print,' *The Guardian* (27 April 2017).

year since 2014, when it stood at 24%.⁴⁵ Research by Demos shows that over 60% of people prefer to read fiction in print form, as opposed to just over 20% who prefer online/digital reading (and the remainder with no preference).⁴⁶

From the Nielsen Books & Consumers survey, we can see that the popularity of ebooks (and audiobooks) varies considerably by type of book and genre. Non-fiction is far more likely to be read in print than fiction, although there are also drastic differences between genres of fiction. Romance and science fiction/fantasy are most likely to be read in ebook form, whereas print readership still dominates for literary/classic fiction. Poetry is even more likely to be read in print – almost as likely as children’s fiction.

Figure 3: Format of books purchased by genre (Nielsen Books & Consumers survey)



⁴⁵Nielsen Books & Consumers data 2019 Nielsen suggests that the extent of this change requires caution, as may in part reflect changes over time in the methodology relating to this question.

⁴⁶Andrew Gloag and Alan Lockey, *Quality Control: Reading, Publishing and the Modern Attention Economy* (Demos, 2019), p. 23.

Looking at trends over time, we can see that ebooks still represent nearly 50% of fiction purchases, but this has decreased slightly from a peak in 2015. Literary/classic fiction has clearly seen a resurgence of print, with the use of ebooks diminishing very significantly from a peak in 2014. Poetry seems never to have become a popular ebook format, and here too we can see a slight decline in ebook share from 2015.

		Total adult fiction						
		2012	2013	2014	2015	2016	2017	2018
		%	%	%	%	%	%	%
Print		60	50	47	44	45	47	46
Ebook/app		37	48	50	52	50	48	48
Audiobook		3	3	3	4	4	5	6
		Literary/classic fiction						
		2012	2013	2014	2015	2016	2017	2018
		%	%	%	%	%	%	%
Print		61	54	56	59	60	61	63
Ebook/app		36	44	41	37	35	31	30
Audiobook		3	2	3	4	5	8	7
		Poetry						
		2012	2013	2014	2015	2016	2017	2018
		%	%	%	%	%	%	%
Print		89	89	89	86	87	84	89
Ebook/app		9	5	9	12	8	11	9
Audiobook		2	6	2	2	5	6	2

According to Nielsen's *Understanding the Ebook Consumer*, heavy ebook buyers (those buying 16 or more per year) have "a key role in the market." They drive more than half of ebook sales despite only being 13% of buyers. The heavy e-book buyer is more likely to be female, aged 65+, white, living in the North, and retired. 68% of heavy buyers say they read daily or nearly every day.

Kobo did some in-depth research in 2016 about its best customers, the 'passionate readers' who used a Kobo more than 30 minutes a day. 75% were women and 77% were over 45 years old. On average they bought 60 e-books and 16 print books per year. Indeed 16% of this group said they bought an e-book 'almost every day.' Both romance and mysteries particularly attracted these enthusiastic users of e-books.⁴⁷

Is piracy the elephant in the room when it comes to ebooks? Nielsen finds that 17% of e-books acquired by readers were acquired through "other" means, including "other free downloads, borrowed from friends/family, received as gifts," but doesn't break this figure down further. Heavy buyers were far more likely to pay for their ebooks than light buyers.⁴⁸ Research in Australia found that 8% of respondents admitted to pirating ebooks, up to a high of 20% of those aged 20-29.

However, most of this piracy was of textbooks, suggesting that the impact on the fiction market is not large.⁴⁹

What is noteworthy is the number of ebooks that are acquired for free. According to Nielsen, "42% of e-books obtained by respondents were bought individually, with a further 10% bought on subscription. Just under half were obtained for free via various methods."⁵⁰ Library borrowing, e-lending services and free trials were all significant methods of acquisition. Of those ebooks that were purchased individually (as opposed to via a subscription), 34% were purchased for less than £1.

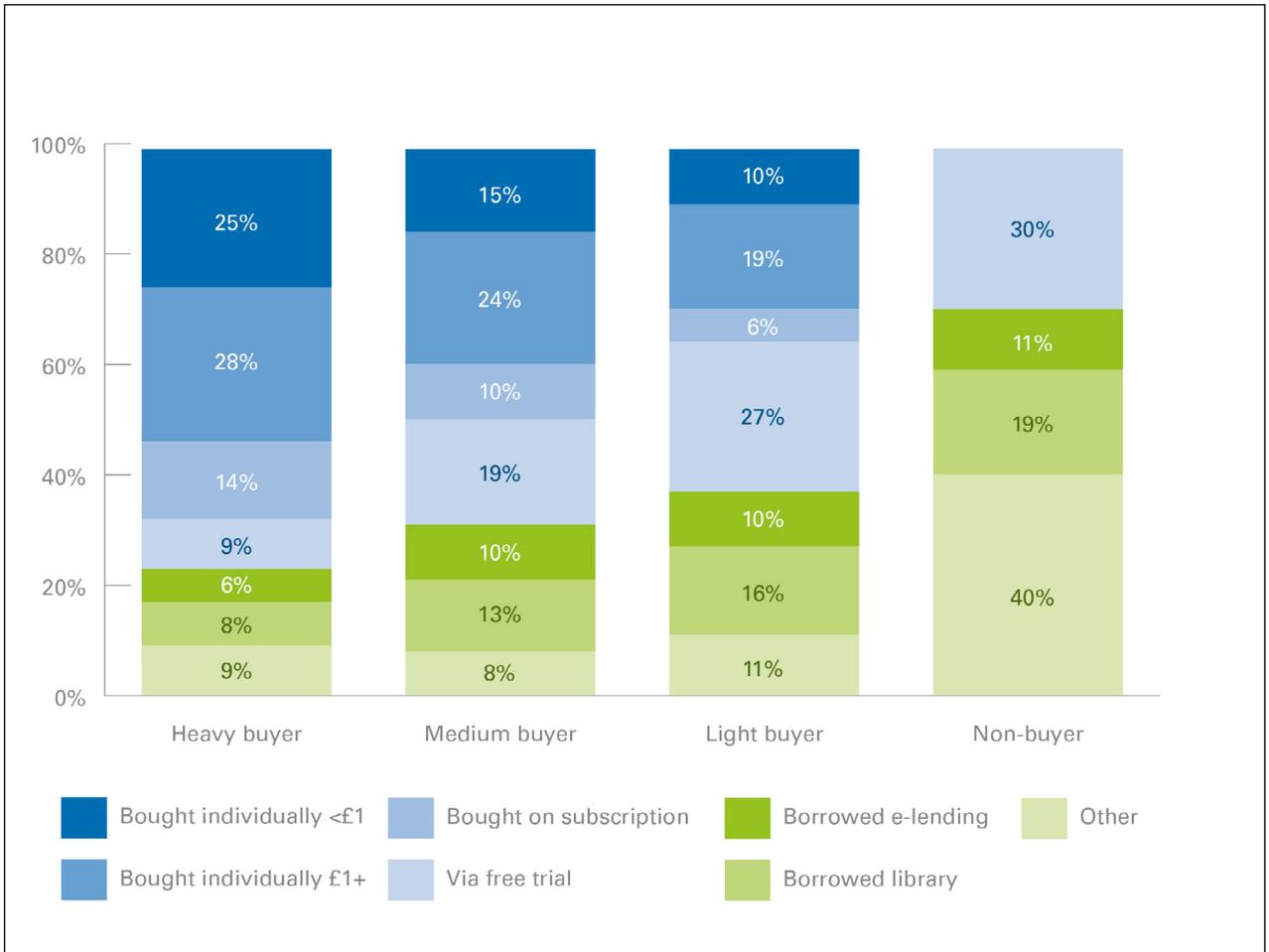
⁴⁷ Kobo, *How the Best Readers in the World Read* (2016).

⁴⁸ Nielsen Book Research, *Understanding the UK E-book Consumer* (2019), p. 5.

⁴⁹ David Throsby, Jan Zwar and Callum Morgan, *Australian Book Readers: Survey Method and Results*, p. 17. It is also worth noting that books tend to be considerably more expensive in Australia than in the UK.

⁵⁰ Nielsen, *Understanding the UK Ebook Consumer*, p 5.

Figure 4: Method share of e-books obtained in the past 12 months, by e-book buying habits (Nielsen, Understanding the E-Book Consumer)



5.2.2 Audiobooks

Audiobook listening is still a minority taste in the UK, with only 12% of book buyers listening daily or weekly, as opposed to 57% for print books. Yet the popularity of audiobooks is growing dramatically – one of the few clear areas of growth potential in a broadly mature market. According to the Publishers Association, audiobooks are “the fastest growing area in digital publishing,” with audiobook download sales value having increased by 193% between 2013 and 2018.⁵¹

The increase in digital audiobook listening (in 2017, 62% of audiobook listeners had listened online or via a mobile, as opposed to 48% who had listened via CD and 12% by cassette tape!)⁵² also means a change in the listening experience, as digital audiobooks offer much more scope for unabridged readings than time-limited CDs and tapes.

What is particularly striking about audiobooks is their appeal to demographic segments that are generally not likely to be enthusiastic about reading. Compared to the UK population, audiobook consumers are more likely to be male, aged between 18 and 44, BAME, and in full-time employment. Heavy buyers of audiobooks are even more likely to fall into these categories. These are not your typical avid readers – but they are typical audiobook listeners.⁵³

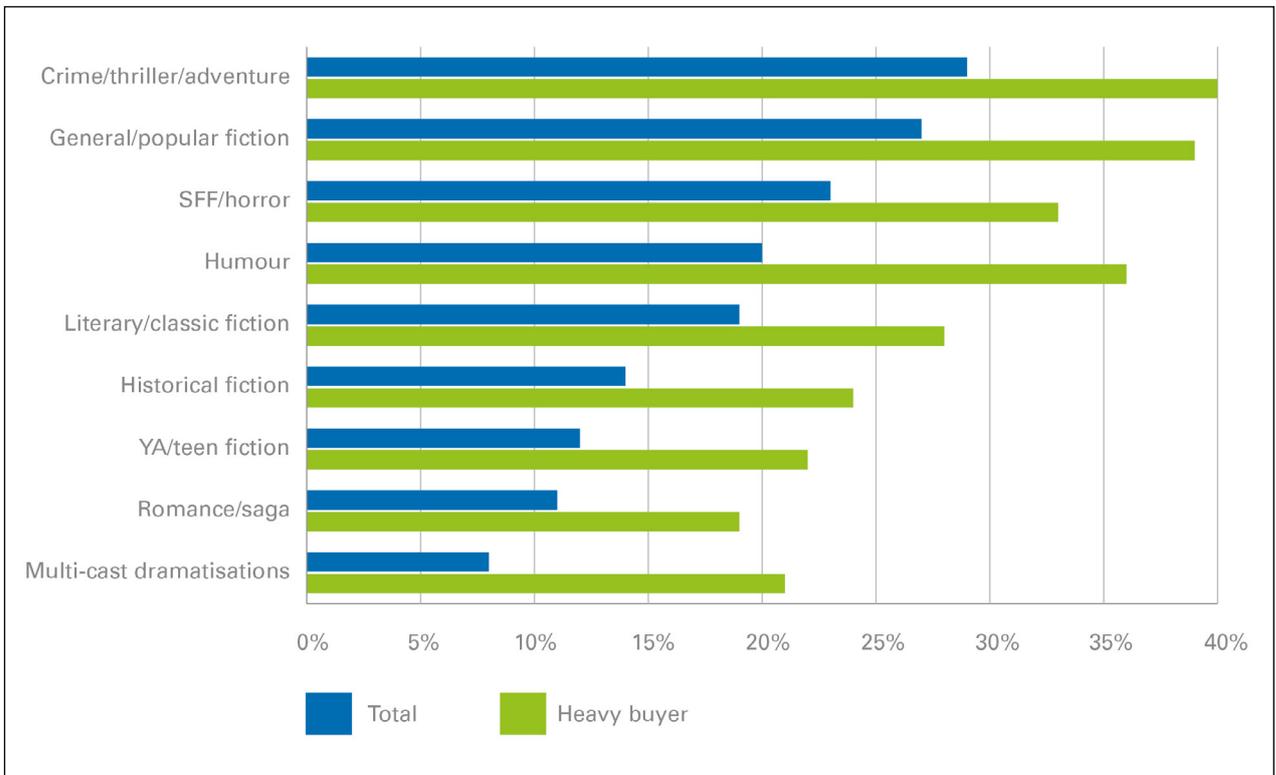
Audiobooks show the same pattern we see across fiction as a whole – that heavy consumers are more likely to consume literary/classic fiction. 28% of heavy buyers had listened to literary/classic fiction in the past 12 months, as opposed to 19% of all consumers.

⁵¹ Publishers Association, ‘Audiobooks remain fastest growing sector in digital publishing’ (2018).

⁵² Nielsen, *Understanding the UK Audiobook Consumer 2017* (2017).

⁵³ *Ibid.*

Figure 5: Audiobook genres consumed in the past 12 months (Nielsen, Understanding the UK Audiobook Consumer 2017)



What do heavy audiobook buyers like about audiobooks? They can do other things while listening (women are particularly enthusiastic about this) and they enjoy the narrative experience – they find it relaxing and say it helps to bring the book to life. 33% of heavy buyers say it gives them a new perspective on a book, compared to only 21% of all audiobook listeners.⁵⁴

Although strictly speaking out of scope for this research, it is perhaps worth observing that podcasts are also booming in popularity. Ofcom has reported that the number of weekly podcast listeners nearly doubled between 2013 and 2018 – with 10.9% of people over 15, and 18.7% of 15-24 year olds, listening weekly.⁵⁵ Nielsen Books & Consumers data shows that heavy book buyers are more likely to listen to podcasts. Much discussion of podcasts frames them as substituting for the radio, but there is perhaps potential for further research about the relationship between reading/audiobook listening and radio/podcast listening.

⁵⁴ *Ibid*

⁵⁵ Ofcom, 'Podcast listening booms in the UK' (2018).

5.2.3 Devices

Once upon a time ebook reading was primarily the domain of an ebook reader – a Kindle, Nook, or Kobo, to name three of the most popular brands. Although ebook readers and tablets are still the most common ways of reading ebooks, their use has plateaued or declined, with the use of smartphones on the increase.

Although only 16% of e-books bought in 2018 were read on smartphones, smartphone use was more common for literary/ classic fiction.⁵⁶ Interestingly, smartphones are more likely to be used for reading ebooks among BAME readers than it is among white readers.

Total books	<i>Asian</i>	<i>Black</i>	<i>White</i>
Sample size	619	257	11375
	%	%	%
eReader	22	14	50
Tablet	30	31	32
SmartPhone	33	36	11
PC/laptop	11	14	4

5.2.4 Online reading

Online reading is relatively rarely conceptualised as ‘reading’ in the same sense as reading a printed novel. Often it is ephemeral in nature, more akin to magazine or newspaper reading, and therefore out of scope for this research. However, it is clear that people are also reading novels, short stories and poetry online. As discussed earlier, there has been a clear increase in the sales of published poetry driven by the popularity of ‘Instagram poets,’ and there are numerous examples of poets achieving popularity for a wider body of work following the viral success of particular poems (Warsan Shire and Patricia Lockwood, for example). Nielsen Books & Consumers data shows that 18% of book-buyers read short stories online in 2017⁵⁷.

⁵⁶ Nielsen Books & Consumers data 2019.

⁵⁷ This seems high: further research would be useful to check whether this is down to misinterpretation of the question by respondents.

While there is relatively little evidence about reader habits around online reading, 2017 research showed that in Australia, 16.6% of respondents “read stories/poems on Facebook and other general (not book specific) social media and blogs” (peaking at 27.8% of 30-39 year olds) and 10.4% “read stories/poems on Wattpad, Tumblr, Archive of Our Own, fanfiction.net or similar websites” (peaking at 26.7% of under-20s).⁵⁸

⁵⁸David Throsby, Jan Zwar and Callum Morgan, *Australian Book Readers*, p. 22.

6 Libraries

6.1 Visits and borrowing in decline

Both borrowing and visits to libraries are in decline – it has been difficult to escape this news. The issues around this are complex. As this report is not focused on the decline in library usage, it does not attempt to unpick the relative importance of the causal factors. These are likely to include austerity-driven library closures – alongside decreases in opening hours, borrowing stock and professional staff – as well as a very significant decrease in the inflation-adjusted average selling price for both hardbacks and paperbacks alongside wider societal factors such as expanding competition for leisure time.⁵⁹

Whatever the reasons, borrowing has been in decline since at least the early 1980s.⁶⁰ Annual issues of adult fiction in the UK were 368 million in 1986/87⁶¹ and were down to 81 million in 2016/17,⁶² despite the increase in population over this period.

Book issues per capita were 5.7 in 2003/04 and have decreased all but one year since then – reaching 3.0 in 2016/17.⁶³ Active borrowing is declining even faster than library use: the ratio of library users to active borrowers was 2.15 in 2005/6 and 2.30 in 2013/14.⁶⁴

⁵⁹ Douglas J.C. Grindlay and Anne Morris, 'The decline in adult book lending in UK public libraries and its possible causes,' *Journal of Documentation*, Vol. 6 No 6 (2004).

Canelo, *Literature in the 21st century*, p. 12.

⁶⁰ Grindlay and Morris, 'The decline in adult book lending in UK public libraries.'

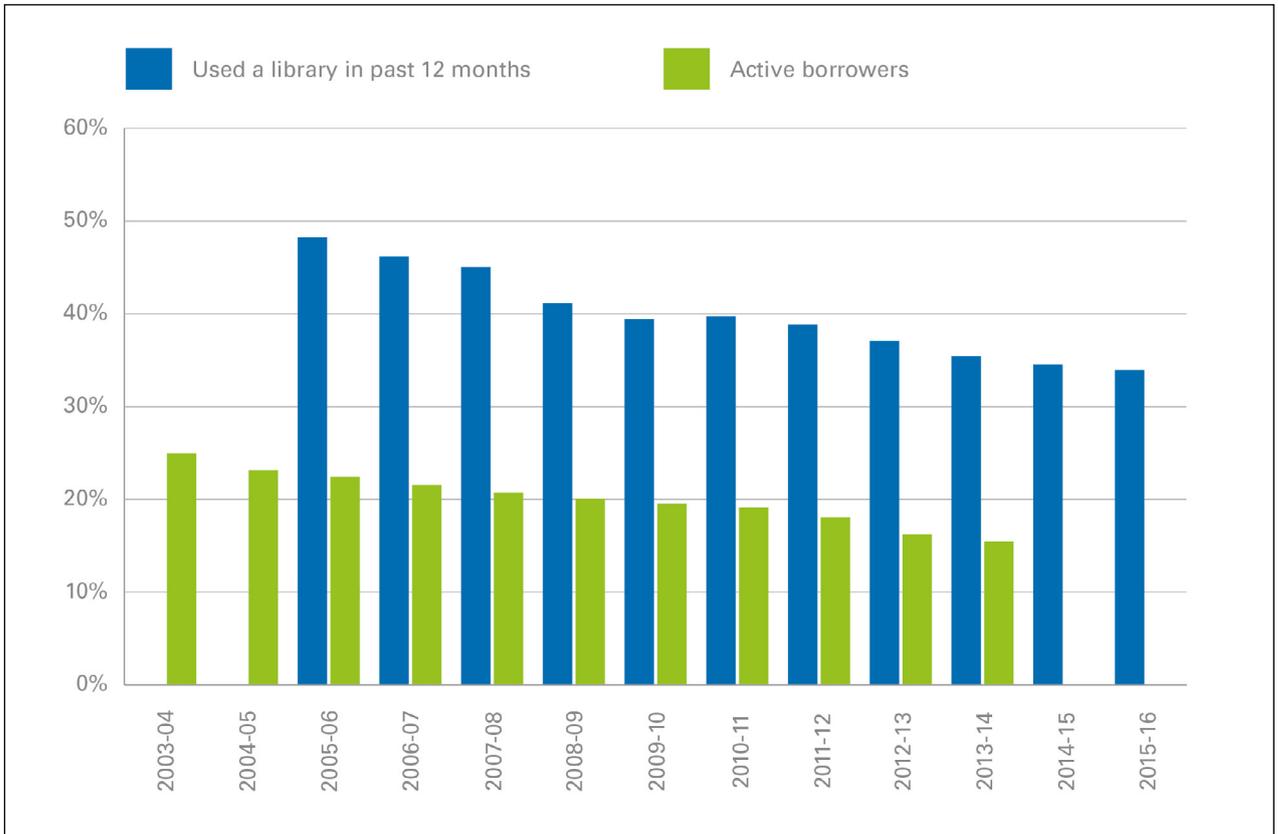
⁶¹ *Ibid*, p. 611.

⁶² CIPFA statistics.

⁶³ CIPFA statistics. LISU, *UK Library Statistics*.

⁶⁴ Katie Cudworth and Jacqui Fortnum, *Evidencing Libraries Audience Reach: Research findings and analysis*, p. 16.

Figure 6: Library users and active borrowers as a percentage of UK population (CIPFA public library actuals and DCMS Taking Part survey)



One interesting trend is that both library use and frequent library use have declined particularly dramatically among those who might be thought to be their most obvious users – avid readers. Of those who read more than one book a week, over 75% were frequent library users in 2011. By 2016, just over 40% were.⁶⁵

This may be linked to wider policy decisions. The DCMS report *Libraries Deliver: Ambition for Public Libraries in England 2016 to 2021* set out an ambition to transform library services, recognizing that libraries “not only provide access to books and other literature but also help people to help themselves and improve their opportunities, bring people together, and provide practical support and guidance.” It lays out a vision for libraries as community hubs that “offer significant reach into local communities and a cost-effective way of ensuring that people are connected to services they need when they need them,” providing for needs including – but definitely not limited to – the need to read.⁶⁶ Similarly, the

⁶⁵ Jenny Peachey, *Shining a Light: English data about attitudes to and use of public libraries 2011–2016* (Carnegie UK Trust), p 7.

⁶⁶ DCMS, *Libraries Deliver: Ambition for Public Libraries in England 2016 to 2021* (updated 28 September 2018).

Universal Library Offers developed by Libraries Connected for the public library network includes reading as one of four offers: reading, information and digital, culture and creativity, health and wellbeing.⁶⁷

Therefore what we may be seeing – in tandem with a general decline in library use – is a shift in patterns of library use away from book borrowing and towards engagement with other types of services and offers.

6.2 Library users are diverse

In a policy climate where access and diversity are increasingly important to cultural funders, it is important to note that library users are considerably more diverse than many other types of cultural attenders. In a 2017 report, The Audience Agency summarises DCMS data on library users as follows:

- “Women are more likely to be library users than men; 38% compared to 30% in England...”
- “25-39 year olds are consistently the highest library users in terms of age; 40% fall into this age group in England...”
- “Households with young children are more likely to use libraries”
- A higher proportion of people who identify as being from Black, Asian or Ethnic minority (BAME) backgrounds are library users (47%) compared to those who identify as being from a White ethnic background (33%).
- “Overall, libraries have a broader reach compared to other forms of cultural engagement. This is indicated by the Taking Part data through comparison of library attender profiles with those for other cultural events and activities, and is particularly evident in relation to ethnicity.”
- “Although the data suggests that libraries reach a higher proportion of people from upper socio-economic groups than lower socio-economic groups, it also indicates that this gap is narrowing.” (as the former groups’ usage declines at a faster rate than the latter groups’).
- “Additionally, comparisons with engagement with other cultural activities indicate that there is less divergence in library usage between higher and lower socio-economic groups.”⁶⁸

⁶⁸ Katie Cudworth and Jacqui Fortnum, *Evidencing Libraries Audience Reach*, p 12.

In other words, libraries are more successful at engaging people from lower socio-economic groups and ethnic minority backgrounds than many other types of cultural activities. Libraries are even succeeding in reaching out to non-readers: according to the Peachey report, “21% to 30% of people... who rarely or never read books use the library.”⁶⁹

The gap between the usage levels of upper and lower socio-economic groups decreased until approximately 2014/15, after which it grew again. Until that point, the usage by upper socio-economic groups was falling faster than the (lower) usage by lower socio-economic groups; after around 2014/15, the usage by upper socio-economic groups levelled off at around 36-37% having visited a public library in the last 12 months, whereas the usage by lower socio-economic groups continued to fall, to 28% having visited a public library in the last 12 months in 2018/19⁷⁰.

6.3 Genres borrowed

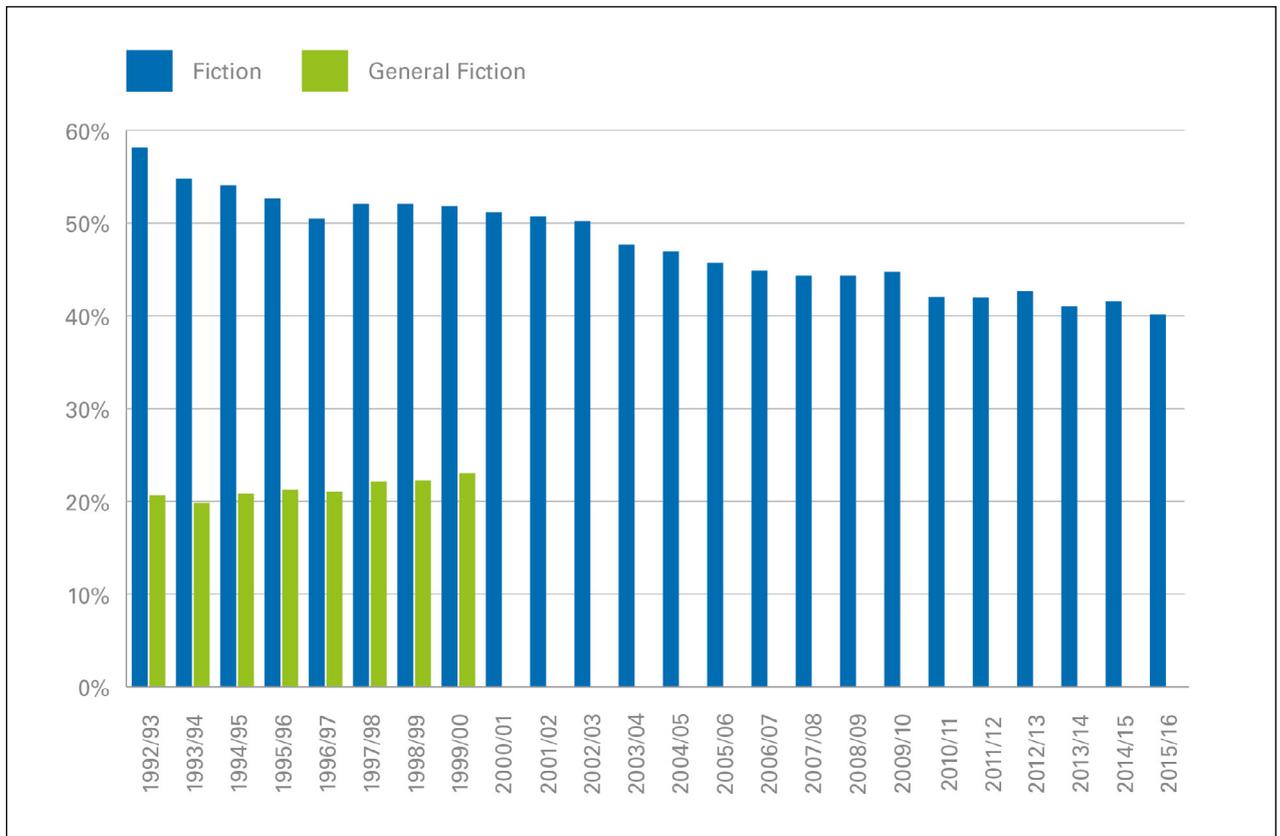
Most of the decline in library borrowing is the result of a long-term collapse in borrowing of adult fiction. This was being discussed as early as 2004,⁷¹ and it has continued to the present day, as is evident from CIPFA statistics. British Library Public Lending Right statistics also show various genres as a percentage of total issues, and included General Fiction as a subcategory from 1992 through 1999. They show that general fiction borrowing was more robust than genre fiction borrowing into the late 90s.⁷² It's not clear whether that trend continued into the twenty-first century.

⁶⁹ Jenny Peachey, *Shining a light: The future of public libraries across the UK and Ireland* (Carnegie UK Trust), p 2..

⁷⁰ Taking Part 2018/19.

⁷¹ Douglas J.C. Grindlay and Anne Morris, 'The decline in adult book lending in UK public libraries and its possible causes.' "Since 2001/2002 PLR has been using the book trade's standard BIC (Book Industry Communications) subject categories. These tables are based on estimated national loans derived from ALL the book loans collected by the PLR office from its UK sample library authorities (not just from loans of books registered for PLR as in the past)." <https://www.bl.uk/plr/loans-by-category-archive>

Figure 7: Fiction and general fiction as a percentage of library issues (Public Lending Right statistics, British Library)



6.4 Formats

There is ambiguous evidence about the lending of e-books and audiobooks in libraries. Although in 2016/17 'electronic products' issues were only 3.5% of book issues,⁷³ DCMS reported that e-book lending increased by 38% between 2014/15 and 2015/16.⁷⁴ However, Nielsen Books & Consumers data does not seem to show any increase in the percentage of UK adults reporting having borrowed an e-book from a public library (and does show a decrease in the proportion of e-book purchasers). Perhaps the lending statistics are reflecting an increase in borrowing by a small number of e-book enthusiasts – we don't have enough evidence to be certain.

⁷³ Electronic products include 'eBooks, eNewspapers, eMagazines & eComics, and eAudio & eAudiovisual' but not talking books, video and DVDs, or software. They are categorised under 'Audiovisual, Electronic and Other Stock' rather than as 'Books.' CIPFA statistics 2018.

⁷⁴ DCMS and British Library, 'Government to extend Public Lending Right scheme to e-book authors,' (press release, 2017).

7 New technologies and their impact

7.1 New preferences and choices

As a leisure activity, reading has existed alongside films, television and radio for a long time. However, the internet, social media, video games and ‘on demand’ entertainment of all kinds present readers with more competing options for their leisure time. A recent report by Demos underlines how dramatic this shift has been:

one thing that you can say about reading and publishing in the 21st century which requires very little research is just how profoundly the way we do both has changed. For one, vast swathes of the published written word are now viewed on screens that have come to dominate, if not our lives, then certainly the way we access information about the wider world. Fully two-thirds of adults (64%) say the internet is an essential part of their life, a statistic that would have been unthinkable even ten years ago, when smartphones were only just beginning to take hold of the communications market. That today this figure seems unsurprising only shows how far we have come in so short a space in time. Both the reading environment and the publishing industry have been totally transformed. We live in a new world of words.⁷⁵

We don’t have much evidence about the impact of this competition for attention – and the evidence that we do have doesn’t paint a very clear picture. Booktrust research from 2013 found that “27% of UK respondents prefer the internet and social media to reading books, rising to 56% among 18-30 year olds. 45% prefer television and DVDs to reading.”⁷⁶ Macquarie University research from 2017 concludes that “the results affirm casual observation regarding the proliferation of social media” when it comes to Australian readers’ reasons for spending less time reading.⁷⁷

Yet Nielsen Books and Consumers data shows that heavy book-buyers were not less likely to spend time on other forms of entertainment – they were actually more likely to say they watched TV, played video games, participated in online communities, and

⁷⁵ Andrew Gloag and Alan Lockey, *Quality Control: Reading, Publishing and the Modern Attention Economy* (Demos, 2019), pp 8-9.

⁷⁶ Alasdair Gleed, *Booktrust Reading Habits Survey 2013*, p. 24.

⁷⁷ David Throsby, Jan Zwar and Callum Morgan, *Australian Book Readers*, p. 11.

used Facebook and Twitter. It seems that heavy book buyers are as eclectic and active in their digital consumption as they are in their reading.

7.2 New reading habits

New formats for engaging with books also offer the potential for shifts in reading habits. The evidence is clearest when it comes to audiobooks, which may have driven a new form of ‘multitasking’ reading. Although audiobook consumers mainly listen during spare time and in bed, significant numbers also listen in the car, while walking or while doing chores.⁷⁸ An Audio Publishers Association survey of frequent listeners in the United States came up with even higher numbers: 68% do housework while listening, 65% bake, 56% exercise and 36% do craft.⁷⁹ Convenience/multi-tasking is the most important factor causing people to listen to audiobooks more, and 46% of listeners like the fact that they can do other things while listening – rising to 49% for heavy buyers.⁸⁰

7.3 New insights: is there a data crisis in publishing?

7.3.1 Less data on sales

Traditionally, book sales are measured through reports from retailers (as with Nielsen BookScan) or from publishers themselves (as with the PA Publishing Yearbook). Yet the rise of online sales (dominated by Amazon) and digital self-publishing have meant an “information asymmetry” that poses increasing challenges to getting an overall picture of the market for books.⁸¹ This challenge is most serious in areas of the market where digital self-publishing and e-books are strongest, most notably genre fiction.

7.3.2 The impact of digital self-publishing

AuthorEarnings.com claims that there has been a significant shift in the market to digital self-publishing that is not captured by traditional publishing industry reporting. It scrapes Amazon data on book sales rank and uses an algorithm to convert this into estimated sales numbers.⁸² Based on this, it argues that e-book sales are still increasing dramatically, rather than declining or plateauing as other data seems to indicate.

⁷⁸ Nielsen, *Understanding the UK Audiobook Consumer 2017*.

⁷⁹ Audio Publishers Association, ‘Audiobooks Continues [sic] Double-Digit Growth,’ (press release, 7 June 2017).

⁸⁰ Nielsen, *Understanding the UK Audiobook Consumer 2017*

⁸¹ Thu-Huong Ha, ‘Are ebooks dying or thriving? The answer is yes’ (Quartz, 2018).

⁸² <http://authorearnings.com/methodology/>

It is correct to highlight a shift in the market to digital self-publishing. Nielsen Books & Consumers says that 19% of adult fiction e-books sold in 2018 were self-published, ranging from a high of 36% for romance/saga/erotic to a low of 7% for general/literary fiction.⁸³

Yet it is far from clear that there is a significant hole in book market data represented by non-traditionally published e-books. Nielsen BookScan data on e-book sales currently covers around 50% of the market, gathered monthly based on invoiced sales by publishers rather than retailer-reported as with print books.⁸⁴ However, this is not their only source of data on the e-book market. The Books & Consumers survey involves online interviews with a nationally representative sample of c. 8,500 UK consumers aged 13-84 each month (over 100,000 interviews per year), providing a cross-check to e-book sales data based on reported purchases including self-published e-books.

The Publishers Association have been working with Nielsen to develop more accurate estimates of the portion of the market represented by digital sales of consumer books. Their 2018 Yearbook uses Nielsen Books & Consumers data to revise its sales estimates (traditionally based on reports from participating publishers) “to not only reflect digital sales of the ‘traditional’ publishing sector, but also book sales of self-published titles, books published by Amazon and from new digital-only media companies.”⁸⁵ As this is an estimate of the value of sales, it will not reflect the distribution of free e-books.

7.3.3 More data on reader habits

The rise of e-books brings the potential for gathering a revolutionary amount of finely-grained data about reader habits – subject, of course, to data protection legislation. We don’t know exactly how much data Amazon and iBooks have gathered, or how they are using it. White papers from Kobo offer intriguing glimpses of what might be possible, but lack detailed information about methodology.⁸⁶

New research is beginning to circumvent the hold that e-reading platforms have had on data about reading habits. A commercial company called Jellybooks has begun gathering permissioned data from readers who agree to participate in research in exchange for free e-books (primarily pre-publication). Most of this research is carried out for publishers wanting to make

⁸³ Nielsen’s UK Books & Consumers Survey 2019

⁸⁴ Information from Nielsen PubTrack Digital.

⁸⁵ *The Publishers’ Association Yearbook 2018*, Technical Appendix.

⁸⁶ For example, Kobo, *How the Best Readers in the World Read* (2016).

decisions about the marketing, publicity and promotion of specific books. Jellybooks knows the age, gender and country of participants, as well as their genre interests, and records data on when, what and how much they read, as well as whether they would recommend the book.

Even this individually-focused research has resulted in some interesting general insights, although some of these could be skewed by the method (these are books that are given away for free rather than chosen and paid for):

- “Most readers typically give up on a book in the early chapters. Women tend to quit after 50 to 100 pages, men after 30 to 50.”⁸⁷
- “Only 5 percent of the books Jellybooks tested were completed by more than 75 percent of readers. Sixty percent of books fell into a range where 25 percent to 50 percent of test readers finished them.”⁸⁸
- Different genres of book seem to be read more at different times of the day and week. For example, although formal analysis has not yet been done, literary fiction appears to be more of a weekend read
- Netflix binge watchers aren’t necessarily less likely to finish reading a book – if they are genre fans on Netflix and are reading a genre book, there is in fact a positive correlation⁸⁹

There is a great deal of potential for further research using tools such as Jellybooks to understand more about who reads what, when; what causes readers to ‘turn off’ from books; and how tastes in reading are correlated (or not) with tastes in culture or mass media. However, the fact that this data is gathered from readers of specific free books means that it is inevitably less representative of the reading public as a whole.

⁸⁷ Alexandra Alter and Karl Russell, ‘Moneyball for Book Publishers: A Detailed Look at How We Read,’ *New York Times* (14 March, 2016).

⁸⁸ *Ibid.*

⁸⁹ Information from Jellybooks.

8 What encourages people to read more?

8.1 Buying and borrowing vs. reading and finishing

This report is an evidence review of reading habits, book-buying habits and library borrowing habits, and a healthy literary ecosystem requires all of these activities. Yet it is worth recognising the extent to which they do not overlap. One may buy a book without reading or finishing it; one may read a book without buying it or even borrowing it from a library. One may re-read for the tenth time a book that one acquired decades ago.

Very little published research exists about the second-hand book market in England and even less on person-to-person lending of books. Anecdotal evidence suggests that large second-hand booksellers had a good year in 2008, just when new book sales began to slump drastically.⁹⁰ However, Nielsen Books & Consumers data suggests that between 2014 and 2017, there was a decline both in second-hand buying (from 30% to 28% of UK adults) and book borrowing (from 19% to 15% of UK adults).

Acquiring and starting to read a book is no guarantee of finishing it. It might be that readers ought to quit reading more books – based on research showing that 54% of respondents “spend up to 3 months struggling through a book before deciding to give up on it,” The Reading Agency launched a ‘quit-lit’ campaign to encourage people to give up sooner and find something they might enjoy more.⁹¹ Sensible advice. Yet Sue Wilkinson of The Reading Agency also points out that if one is taking a reader-centric view of the world, there is no point encouraging people to buy the latest literary award-winner if it is just going to sit unread on their shelves.⁹²

We do have some evidence about the percentage of e-books that actually get finished – and it is not high. This evidence is drawn from readers of e-books, because it is easier to do so, but of course the results might be different for print books for a variety of reasons.

- In 2014 Kobo released some statistics about how often books were finished on its e-reader. It found that in Britain, the most-finished genres were romance (62%

⁹⁰ Stephen Adams, ‘Second-hand book sales up,’ *Telegraph* (9 Jan 2009).

⁹¹ The Reading Agency, *World Book Night 2018: Programme Review and Evaluation*.

⁹² Personal communication

completed), crime and thrillers (61%) and fantasy (60%). Donna Tartt's *The Goldfinch* was completed by only 44% of British readers. By contrast the most-finished e-book was completed by 83%.⁹³

- In 2016, looking at e-book libraries on Kobo e-readers, Kobo found that “[avid readers] open about 77% of their books, and complete 60% of what they’ve purchased. Average readers, on the other hand, open just 60% of what they buy, leaving 40% on the shelf, and complete just 40% of the books in their libraries. So, on average, a reader buys almost twice what they read.”⁹⁴
- Jellybooks considers completion rates above 50% to be “very good” and completion rates above 75% to be “exceptional,” representing less than 5% of books tested. It also has found that readers who don’t complete a book are between 10 and 100 times less likely to say that they would recommend it to others.⁹⁶

However we should take these numbers with a great degree of caution, since they relate to a very narrow segment of readership. Patterns of reading may be different with e-books, particularly given that so many of them are very inexpensive or purchased on subscription.⁹⁷ Books tested by Jellybooks are given as free samples, and therefore even less likely to have readers who are invested in finishing them.

8.2 New technologies

One of the most striking findings relating to reader habits is the very divergent demographics of ebook and audiobook users. As discussed earlier, ebook users tend to be heavy readers, with the expected demographics: older, white, retired women. However, audiobooks tend to appeal to a completely different segment who are much more likely to be reluctant readers: younger, working men. Audiobooks offer an opportunity to target people who would be less likely to pick up a traditional book. Also of note is that Black and Asian readers are heavy users of smartphones in their reading, much more than their White counterparts.⁹⁸

⁹⁸Nielsen Books & Consumers data 2019.

8.3 Making the case for reading for pleasure

We have already discussed the reasons why readers read. In her study of avid book readers in 2017, Merga concluded that:

The subsequent challenge is to further this research in substantial, multi-contextual studies, in order to further develop and refine points for educational intervention and reading promotion, and to begin to design and investigate the efficacy of interventions based on these possible points of engagement.⁹⁹

One intervention that sought to make use of specific, segmented research on motivations to read was the National Year of Reading in 2008, run by the National Literacy Trust with The Reading Agency. This focused on “groups that have a higher proportion of people who find reading difficult,” including both children and adults, such as “families from socio-economic groups C2DE – particularly fathers” and “newly-arrived East Europeans.”¹⁰⁰ It developed messaging throughout the year based on research about the target groups. For example, a specific campaign was aimed at Asian women with the tagline ‘Love reading about love – enjoy reading romance.’¹⁰¹ The effectiveness of, and learnings from, this campaign are detailed in *Reading: the Future*¹⁰².

8.4 Encouraging reluctant and/or infrequent readers

Research for Arts Council England in 2005 found that non-buyers and light buyers of books had difficulty accessing and choosing books that appealed to them,¹⁰³ and many reading programmes in the UK since then have focused on supporting access and choice. These include:

- Books Unlocked, run by the National Literacy Trust, which distributes Man Booker Prize shortlisted novels to people in prisons and young offender institutions
- World Book Night, run by The Reading Agency, which gives out books across the UK, both via volunteers and through institutions such as schools, prisons, hospitals and libraries
- Quick Reads, run by The Reading Agency, which commissions and distributes short, accessible books designed to be appealing to adult readers

⁹⁹ Margaret Kristin Merga, ‘What motivates avid readers to maintain a regular reading habit in adulthood?’ p 154.

¹⁰⁰ Andrew Thomson, *Reading: the Future*, p 5.

¹⁰¹ *Ibid*, pp 7-8.

¹⁰² *Ibid*

¹⁰³ BML, *Expanding the Book Market: A study of reading and buying habits in GB* (Arts Council England, 2005).

- National Poetry Day, run by the Forward Arts Foundation, which is a UK-wide celebration of poetry each October¹⁰⁴.

Also worthy of note, although somewhat different in emphasis, is Reading Ahead, run by The Reading Agency, which challenges participants – reached through schools, libraries, prisons and workplaces – to read six books and record them in a reading diary.

All of these programmes have had positive evaluations, showing that participants increased in confidence, enjoyed reading and read more as a result of participating. However, these evaluations tend to suffer from small sample sizes, limited pre/post surveys, and/or contact with practitioners rather than participants. Most importantly, none of them offers solid longitudinal evidence showing that these interventions have had long-term impacts. More consistent, comparable and robust evidence would be valuable, to assess and evidence the impact of these campaigns.

Having said that, within the limits of the research, the impact is clear. World Book Night 2015 had a particularly in-depth evaluation report and found that gifts of books had a significant short-term impact on infrequent or lapsed readers (those who read less than once a month):

- 80%... stated that they had read more since World Book Night¹⁰⁵
- 47%... said that they had bought more books since World Book Night
- 32%... felt that they had borrowed books from the library more since World Book Night

Focus groups and case studies engaged some readers from six months to a year later. The evaluation found that “the gift of a book prompted a positive emotional commitment on the part of many recipients to undertake a reading challenge and to alter their existing behaviours. [It] helped to overcome their customary perceived barriers to reading and create a new view of themselves as readers.”¹⁰⁶

¹⁰⁴ Included here, although not just targeted at infrequent readers, but at increasing readership of poetry in particular.

¹⁰⁵ Liberty Venn, *World Book Night: Impact Evaluation Report* (The Reading Agency, 2016), p 7.

¹⁰⁶ *Ibid*, p 8.

It noted that:

lack of books at home, difficulty accessing new titles at a local library or lack of inspiration regarding what to buy next prevented some recipients from capitalizing on their discovery. Those recipients that received their book in the workplace or other setting where conversation about books ensued, were more likely to continue reading than many of those that received their books in isolation or had no further contact with the volunteer.¹⁰⁷

Yet strikingly, “World Book Night has greater impact on the behaviours of infrequent readers than of regular readers,” showing that this type of intervention – ideally with follow-up – does have the potential to change relationships with books and reading.¹⁰⁸

This discussion has covered programmes taking place in the UK. Campaigns to promote reading take place all across the world, encompassing the ‘One City, One Book’ programmes pioneered in the United States,¹⁰⁹ Australia’s Reading Hour,¹¹⁰ Canada’s Reading Town/Ville Lecture,¹¹¹ and many more. However, it has proved difficult to find substantive evaluations of the impact of international programmes. A major AHRC-funded three-year interdisciplinary study of ‘mass reading events’ in the US, UK and Canada was conducted between 2005 and 2008 – Beyond the Book.¹¹² Perhaps it is time for an updated international study focusing on best practice in reading promotion.

8.5 Encouraging avid readers

Most research about encouraging reading focuses on non-readers or reluctant readers. Relatively little time has been spent considering what might encourage enthusiastic readers to read even more, although this might have the potential for a significant return. While the motivations of avid readers are likely to overlap considerably with the motivations for reading in general,¹¹³ there may be some areas where they require special consideration. For example, Merga suggests that libraries may need to pay attention to avid readers’ need for concentration, and “not assume that [they] will easily adapt to library environments with elevated noise levels.”¹¹⁴

¹⁰⁷ *Ibid*, p. 26.

¹⁰⁸ *Ibid*, pp. 26-27.

¹⁰⁹ https://en.wikipedia.org/wiki/One_City_One_Book

¹¹⁰ <https://www.alia.org.au/ideas-campaigns-and-events-your-library/australian-reading-hour>

¹¹¹ <http://nationalreadingcampaign.ca/about-reading-town/>

¹¹² <https://www.birmingham.ac.uk/schools/edacs/departments/english/research/projects/beyond-the-book.aspx>

¹¹³ Margaret Kristin Merga, ‘What motivates avid readers to maintain a regular reading habit in adulthood?’, pp. 153-154.

¹¹⁴ Margaret Kristin Merga, ‘Meeting the Needs of Avid Book Readers: Access, Space, Concentration Support and Barrier Mitigation,’ *Journal of Library Administration*, Volume 57, Issue 1(2017).

Heavy book-buyers tend to be more engaged in a wide variety of cultural and social activities, from going to the cinema, to visiting historic houses, going to the theatre or volunteering. They are more likely to read a wide range of genres and in particular are much more likely to read literary fiction (38% as opposed to 21% of all book-buyers). They are also far more likely to discuss books with others in person – 56% as opposed to 36% of all book-buyers.¹¹⁵ There is the potential for more research about how to engage with these active readers whose habits are important for the continued health of the literature sector.

¹¹⁵ Nielsen Books & Consumers data 2019.

9 Conclusion

There is a wide range of evidence related to reading, highlights of which are summarised elsewhere in this report, however:

- There is a lack of a single, standard, comprehensive and publicly-available source which could provide both snapshot insight and longitudinal trends on reading as a whole (although Nielsen provides the most useful commercial sources of data via Bookscan and the Books & Consumers survey).
- There is relatively little research specifically focused on adult reading for pleasure (as opposed to reading in children, book sales, literacy, or the impacts and benefits of reading, for example).

Nonetheless, from the available evidence we can see that:

- Literary fiction seems to be in reasonable health and poetry is a very positive note
- Libraries are important for their diverse engagement but are clearly struggling – and it's concerning that avid readers are turning away from them
- Readers of literary fiction continue to turn away from ebooks and back to print
- Audiobooks offer exciting opportunities because they reach groups that are traditionally not avid readers. Choices of format could use more attention – the fact that BAME readers are much more likely to read on smartphones
- Shift to digital offers new challenges and opportunities for the sector around data
- While reading offers many extrinsic benefits, it is pleasure and enjoyment that draws adults to read fiction and we shouldn't lose sight of this.

10 Recommendations for further research

There would be value in repeating the Book Trust research from 2013¹¹⁶, including the cluster analysis (either as new clusters, or replicating the clusters from 2013 to observe the change in the size and profile of the clusters). This would be particularly useful to supplement Nielsen's data on book *purchasers* with more detail about *readers* overall.

There are several areas where the evidence is particularly patchy, and/or where additional insights would be particularly useful:

- the impact of digital media of various forms (including general internet browsing, social media, podcasts) on reading volume and behaviours, and the profile of readers
- non-traditional sales (e.g. purchases of self-published books, especially via Amazon's self-publishing platform)
- online reading, especially short stories
- library e-book borrowing
- more detailed analysis within genres (and the trends for subgroups of publishers, e.g. Arts Council National Portfolio organisations)
- more consistent, comparable and robust evidence of reading-promotion campaigns (e.g. Books Unlocked, World Book Night, Quick Reads, National Poetry Day, Reading Ahead).

¹¹⁶ Alasdair Gleed, *Booktrust Reading Habits Survey 2013* (Booktrust, 2013).

Appendix A: Are library statistics reliable?

In 2018, DCMS released a critique of CIPFA figures, stating that ‘the data is problematic in a number of respects, and as a result these public discussions may lack important insights into the current state of libraries across the country.’ It goes on to argue that:

The CIPFA statistics sheets were not designed to be a dataset and have only been used as such due to the lack of any alternative national figures. The statistics sheets have significant flaws that undermine their ability to be used as a definitive and authoritative source of data on trends in public library usage over time. The flaws fit into 5 broad categories: issues with structure, consistency, accuracy, standardisation, and variable selection and measurement.

The flaws in the data impair our ability to understand trends at the national level in a comprehensive way.¹¹⁷

It partly seems to be motivated by providing a counterbalance to the CIPFA statistics’ picture of a dramatic decline in library usage, arguing that: “a. The downward trend may be slowing b. The overall trend masks significant variations across and within library services.”

No doubt the report is correct to draw attention to the lack of a ‘consistent and comprehensive open dataset’ for libraries and highlights a wide range of significant issues with the CIPFA figures (around structure and format, presentation, comprehensiveness, accuracy, level of detail, speed of reporting etc). The work of the Libraries Taskforce on the development of a core open dataset is to be welcomed.

However, while there may be issues with the CIPFA statistics, this does not undermine the essential message from our perspective that library book borrowing is falling. We can see this reflected in other reliable statistical series: for example, ‘Taking Part’ statistics on the number of people who visited a library within the past 12 months and Public Lending Right borrowing statistics.

¹¹⁷ Joan O’Bryan, ‘Analysing data: CIPFA statistics and the future of England’s libraries,’ (DCMS, 2018).
<https://www.gov.uk/government/publications/analysing-data-cipfa-statistics-and-the-future-of-englands-libraries>

Bibliography

Stephen Adams, 'Second-hand book sales up,' *Telegraph* (9 Jan 2009). <https://www.telegraph.co.uk/culture/books/4208828/Second-hand-book-sales-up.html>

Alexandra Alter and Karl Russell, 'Moneyball for Book Publishers: A Detailed Look at How We Read,' *New York Times* (14 March, 2016). <https://www.nytimes.com/2016/03/15/business/media/moneyball-for-book-publishers-for-a-detailed-look-at-how-we-read.html>

Audio Publishers Association, 'Audiobooks Continues [sic] Double-Digit Growth,' (press release, 7 June 2017).

BML, EXPANDING THE BOOK MARKET: A study of reading and buying habits in GB (Arts Council England, 2005).

Audra R. Blyseth, "A Phenomenological Study of Adult Reading Motivation" (dissertation, Liberty University, 2015).

Booknet Canada, 'Print poetry sales grew by 79% in 2016,' (press release, 2017). <https://www.booknetcanada.ca/press-room/2017/3/15/print-poetry-sales-grew-by-79-in-2016>

BOP Consulting, *Literature Review: The impact of reading for pleasure and empowerment* (The Reading Agency, 2015).

Canelo, *Literature in the 21st century* (Arts Council England, 2017).

Kirsty Cooke, '51% of UK adults read a book in the last year' (Kantar article, 2019).

Claire Creaser, Sally Maynard and Sonya White, *LISU Annual Library Statistics 2006* (LISU).

Katie Cudworth and Jacqui Fortnum, *Evidencing Libraries Audience Reach: Research findings and analysis* (Arts Council England, 2017).

Steve Davies, *Taking stock: the future of our public library service* (UNISON, 2008).

DCMS and British Library, 'Government to extend Public Lending Right scheme to e-book authors,' (press release, 2017). <https://www.gov.uk/government/news/government-to-extend-public-lending-right-scheme-to-e-book-authors>

DCMS, *Libraries Deliver: Ambition for Public Libraries in England 2016 to 2021* (updated 28 September 2018). <https://www.gov.uk/government/publications/libraries-deliver-ambition-for-public-libraries-in-england-2016-to-2021/libraries-deliver-ambition-for-public-libraries-in-england-2016-to-2021>

Lesley Dee, Susan Hart and Cathy Jennings, *Reading Groups, Libraries and Communities: An exploratory study* (Society of Chief Librarians and The Reading Agency, 2017).

Linda Dixon and Charlotte Robey, *Quick Reads Evaluation Report 2014-15* (National Institute of Adult Continuing Education, 2015).

Sam Duncan, *Understanding Reading for Pleasure for emerging adult readers* (National Research and Development Centre for Adult Literacy and Numeracy, 2010).

Alison Flood, 'Ebooks can tell which novels you didn't finish,' *The Guardian* (10 Dec 2014). <https://www.theguardian.com/books/2014/dec/10/kobo-survey-books-readers-finish-donna-tartt>

Alison Flood, 'Men make up their minds about books faster than women, study finds,' *The Guardian* (8 March 2016). <https://www.theguardian.com/books/2016/mar/08/men-make-up-their-minds-about-books-faster-than-women-study-finds>

Alasdair Glead, *Booktrust Reading Habits Survey 2013* (Booktrust, 2013).

Andrew Gloag and Alan Lockey, *Quality Control: Reading, Publishing and the Modern Attention Economy* (Demos, 2019). <https://demos.co.uk/wp-content/uploads/2019/08/Quality-Control-Digital-.pdf>

Douglas J.C. Grindlay and Anne Morris, 'The decline in adult book lending in UK public libraries and its possible causes,' *Journal of Documentation*, Vol. 6 No 6 (2004). <https://doi.org/10.1108/00220410410568124>

Douglas J.C. Grindlay and Anne Morris, 'The decline in adult book lending in UK public libraries and its possible causes: II. Statistical analysis,' *Journal of Documentation*, Vol. 60 No. 6, (2004). <https://doi.org/10.1108/00220410410568133>

Thu-Huong Ha, 'Are ebooks dying or thriving? The answer is yes' (Quartz, 2018).

Christine Hardy, 'Women's reading constructs and their impact on reading behaviours,' *Participations* Volume 5, Issue 2 (2008). http://www.participations.org/Volume%205/Issue%202/5_02_hardy.htm

Sacha Hilhorst, Alan Lockey and Tom Speight, *A Society of Readers* (Demos, 2018).

Horizon Research Limited, *Book Reading in New Zealand* (New Zealand Book Council, 2018).

Christopher Ingraham, 'Poetry is Going Extinct, Government Data Show,' *Washington Post* (24 April, 2015).

Kobo, *How the Best Readers in the World Read* (2016).

Ben Lee, Charlotte Boulton and Leon Osbourne, 'Strategic review of the Universal Offers, final report', <https://www.librariesconnected.org.uk/resources> (July 2019).

John Maher, 'Can Instagram Make Poems Sell Again?' *Publishers Weekly* (2018). <https://www.publishersweekly.com/pw/by-topic/industry-news/publisher-news/article/75976-can-instagram-make-poems-sell-again.html>

Man Booker Prize, 'First research on the sales of translated fiction in the UK shows growth and comparative strength of international fiction' (2016). <https://thebookerprizes.com/resources/media/pressreleases/first-research-sales-translated-fiction-uk-shows-growth-and>

Margaret Kristin Merga, 'Becoming a Reader: Significant Social Influences on Avid Book Readers,' *School Library Research*, Volume 20 (2017).

Margaret Kristin Merga, 'Meeting the Needs of Avid Book Readers: Access, Space, Concentration Support and Barrier Mitigation,' *Journal of Library Administration*, Volume 57, Issue 1(2017). <https://doi.org/10.1080/01930826.2016.1185854>

Margaret Kristin Merga, 'What motivates avid readers to maintain a regular reading habit in adulthood?' *Australian Journal of Language and Literacy*, Vol. 40, No. 2 (2017).

Jim Milliot, 'E-book Sales Fell 10% in 2017,' *Publishers' Weekly* (25th April 2018).

Sharon Murphy, *Towards Sustaining and Encouraging Reading in Canadian Society: A Research Report* (National Reading Campaign, 2013). <http://nationalreadingcampaign.ca/wp-content/uploads/2013/09/TowardsSustainingAndEncouragingReading.pdf>

National Endowment for the Arts, *U.S. Trends in Arts Attendance and Literary Reading: 2002-2017* (National Endowment for the Arts, 2018).

National Statistics, *Taking Part focus on: libraries* (DCMS, April 2016).

National Statistics, *Taking Part 2016/17: LITERATURE* (Arts Council England, 2017).

Nielsen, *Understanding the UK Audiobook Consumer 2017*.

Nielsen Book Research, *Understanding the UK E-book Consumer* (2019),

NPD Group, 'Instapoets Rekindling U.S. Poetry Book Sales,' (NPD Group press release, 2018).

Joan O'Bryan, 'Analysing data: CIPFA statistics and the future of England's libraries,' (DCMS, 2018). <https://www.gov.uk/government/publications/analysing-data-cipfa-stat...nalyzing-data-cipfa-statistics-and-the-future-of-englands-libraries>

Natasha Onwuemezi, 'Poetry sales are booming, LBF hears,' *The Bookseller* (2018). <https://www.thebookseller.com/news/poetry-summit-766826>

Clem Pabion and Adam Holmes, *Books Unlocked: Evaluation Findings* (National Literacy Trust, 2017).

Jenny Peachey, *Shining a Light: English data about attitudes to and use of public libraries 2011–2016* (Carnegie UK Trust).

Jenny Peachey, *Shining a light: The future of public libraries across the UK and Ireland* (Carnegie UK Trust).

Jenny Peachey, *Shining a Light: How people in the UK and Ireland use public libraries and what they think of them* (Carnegie UK Trust).

Eleanor Penistone, *Quick Reads Evaluation 2016* (Learning and Work Institute, 2016).

Andrew Perrin, 'Book Reading 2016' (Pew Research Centre, 2016). <http://www.pewinternet.org/2016/09/01/book-reading-2016/>

Pew Research Centre, *Reading Habits in Different Communities* (2012). <https://www.pewinternet.org/2012/12/20/reading-habits-in-different-communities-2/>

Prospero, 'Book-publishing's naughty secret,' *The Economist* (26 May 2016).

The Publishers Association, 'Audiobooks remain fastest growing sector in digital publishing' (2018) <https://www.publishers.org.uk/news/releases/2018/audiobooks-remain-fastest-growing-sector-in-digital-publishing/>

The Publishers' Association Yearbook 2018 (Publishers' Association, 2019).

Quick Reads, *Reading Between the Lines: the Benefits of Reading for Pleasure* (Quick Reads, 2015).

The Reader, *Cultural Value: Assessing the intrinsic value of The Reader Organisation's Shared Reading Scheme*

The Reading Agency, *Reading Groups in the UK in 2015*.

The Reading Agency, *Reading Ahead 2016-17 Evaluation Report* (2017).

The Reading Agency, *World Book Night 2014 Evaluation Report* (2014).

The Reading Agency, *World Book Night 2016 Evaluation Report* (2016).

The Reading Agency, *World Book Night 2018: Programme Review and Evaluation*.

Society of Chief Librarians, *Review of Reader Development Activities in Libraries and Training Needs* (2017).

Mark Sweney, "'Screen fatigue' sees UK ebook sales plunge 17% as readers return to print," *The Guardian* (27 April 2017).

Jaclyn Swope, 'Translated fiction in the UK: The stats,' *BookMachine* (2017). <https://bookmachine.org/2017/05/25/translated-fiction-uk-stats/>

Andrew Thomson, *Reading: the Future* (National Year of Reading).

David Throsby, Jan Zwar and Callum Morgan, *Australian Book Readers: Survey Method and Results* (Macquarie Economics Research Papers, 2017).

Liberty Venn, *World Book Night: Impact Evaluation Report* (The Reading Agency, 2016).

Rob Walker, "'Now it's the coolest thing': rise of Rupi Kaur helps boost poetry sales," *The Guardian* (7 October 2017). <https://www.theguardian.com/books/2017/oct/07/now-its-the-coolest-thing-rise-of-rupi-kaur-helps-boost-poetry-sales>

