



THE GLOBAL CHILDREN'S BOOK MARKET AND CONSUMER

INTERNATIONAL PUBLISHERS CONGRESS
APRIL 10, 2016

Jonathan Stolper
SVP, Managing Director
Nielsen Book



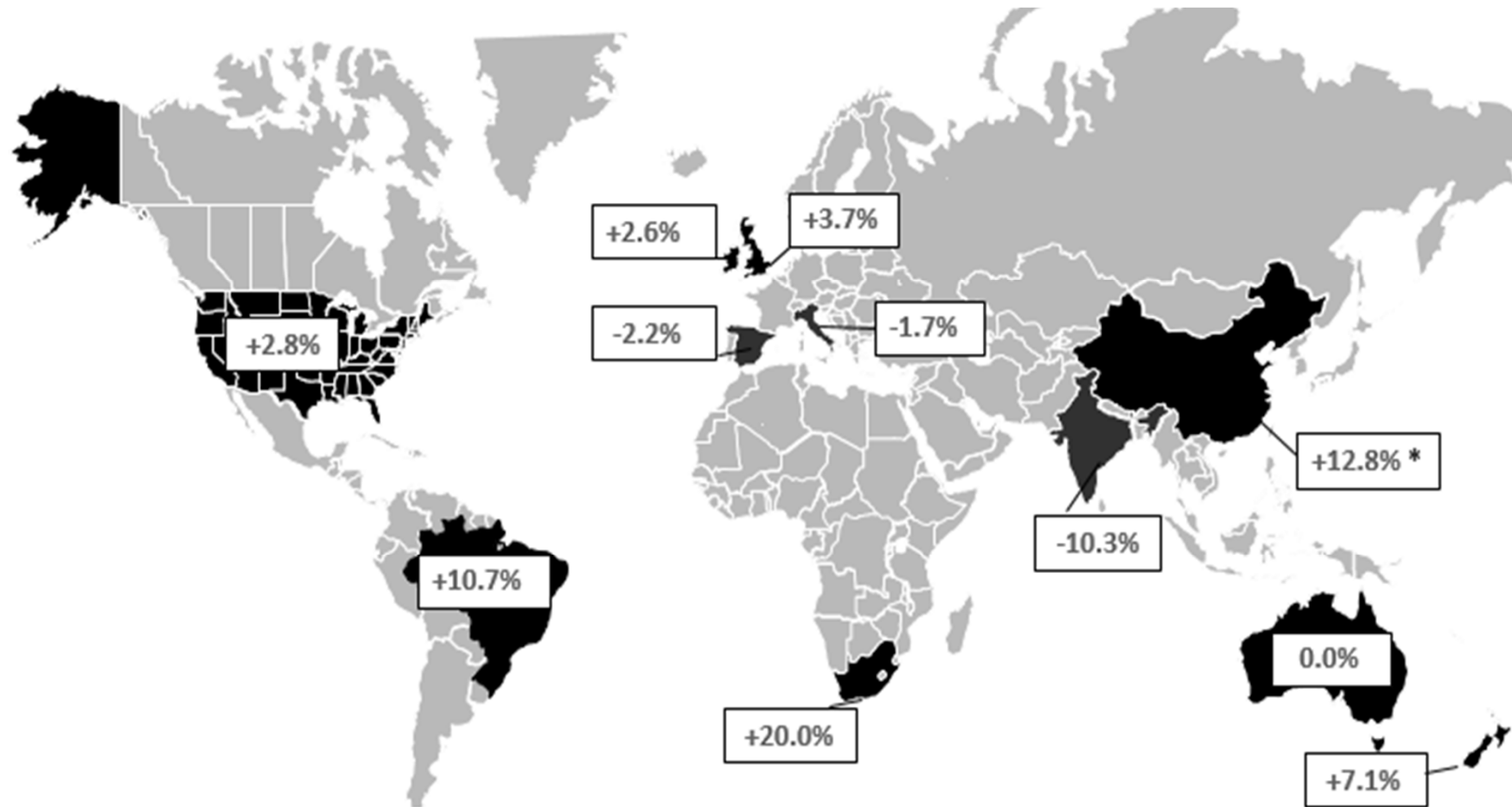
NIELSEN BOOK DATA SOURCES USED

BOOK LANDSCAPE INFORMATION			JUVENILE BOOK BUYERS
BOOKSCAN	PUBTRACK DIGITAL	BOOKS & CONSUMERS Monthly Tracker	JUVENILE DEEP DIVE
Juvenile Volume Trends/CAGR Category Growth Market Position	Juvenile eBook Volume eBook Bestsellers Publisher eMarketshare Author eMarketshare	Print vs eBook trends Sales Channels Demographics of the YA genre	Demographics Role of books in HH Discovery Path to Purchase Outlet Strategy Children's book 0 to 12 Teens Adult YA Cross-over
<small>*Based on new, purchased (paid for) books only; excludes Young Adult books</small>			

An abstract graphic on the left side of the page. It features a thick vertical black bar on the far left. To its right, a series of thin, curved lines form a shape that resembles a stylized 'n' or a series of overlapping arcs. Several thin lines extend from the top and bottom of this shape towards the right, ending in small grey and black dots. The overall effect is that of a wireframe or a technical drawing.

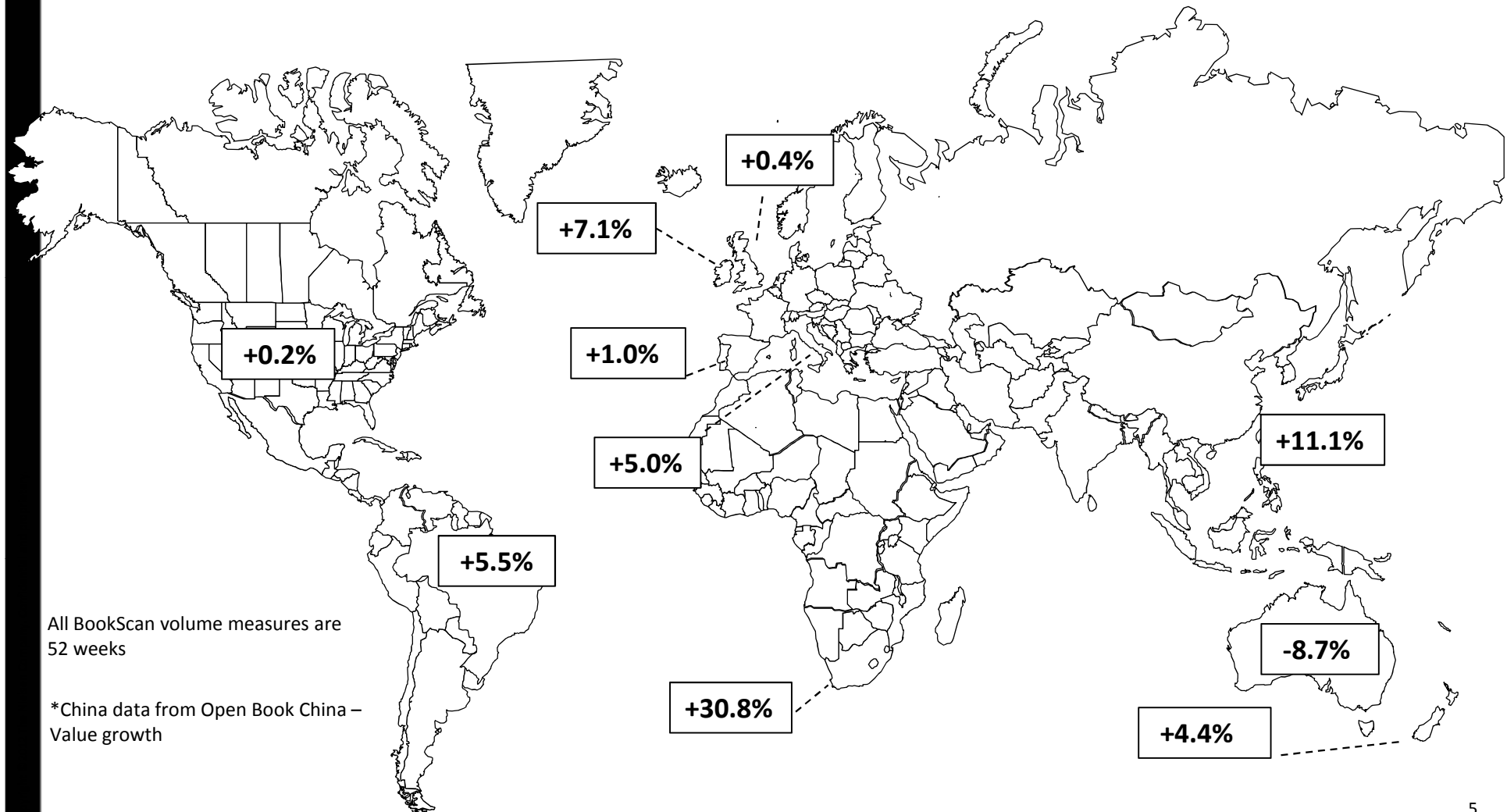
GLOBAL CHILDREN'S SALES OVERVIEW

BOOKSCAN'S TEN INTERNATIONAL TERRITORIES AND CHINA – ALL BOOKS 2015

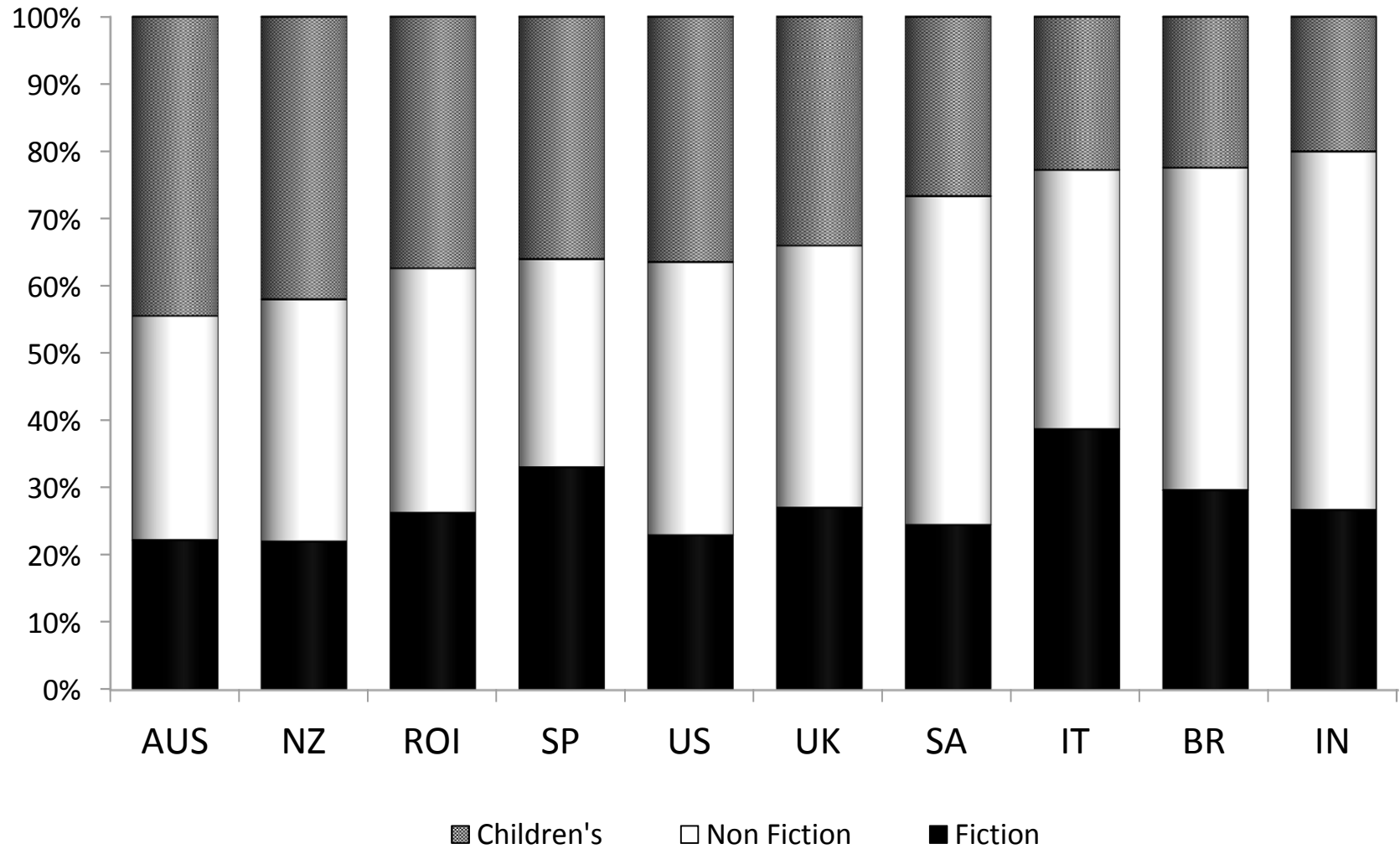


BOOKSCAN'S TEN INTERNATIONAL TERRITORIES AND CHINA – CHILDRENS BOOKS

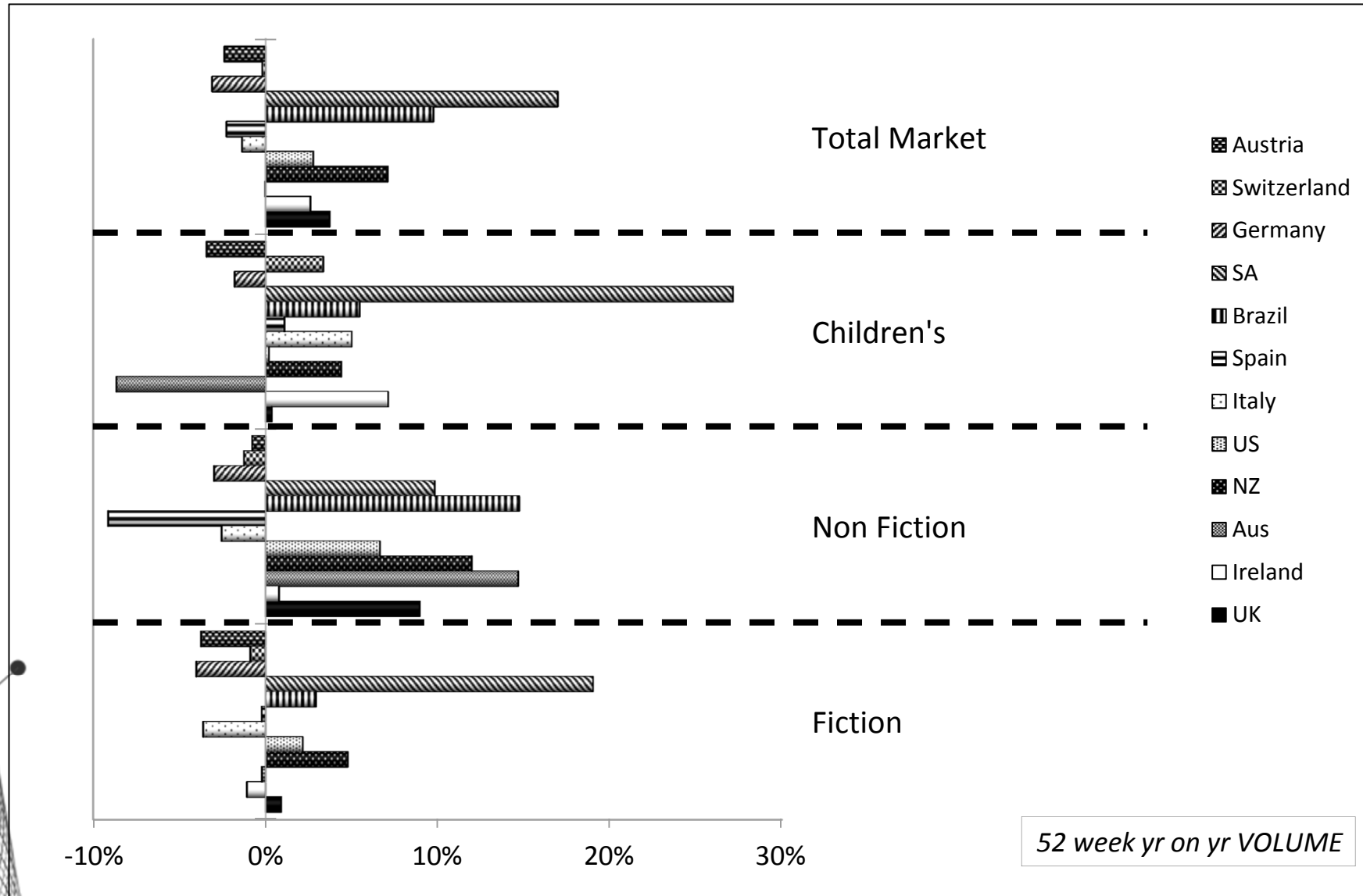
2015



INTERNATIONAL MARKET SHARE BY GENRE

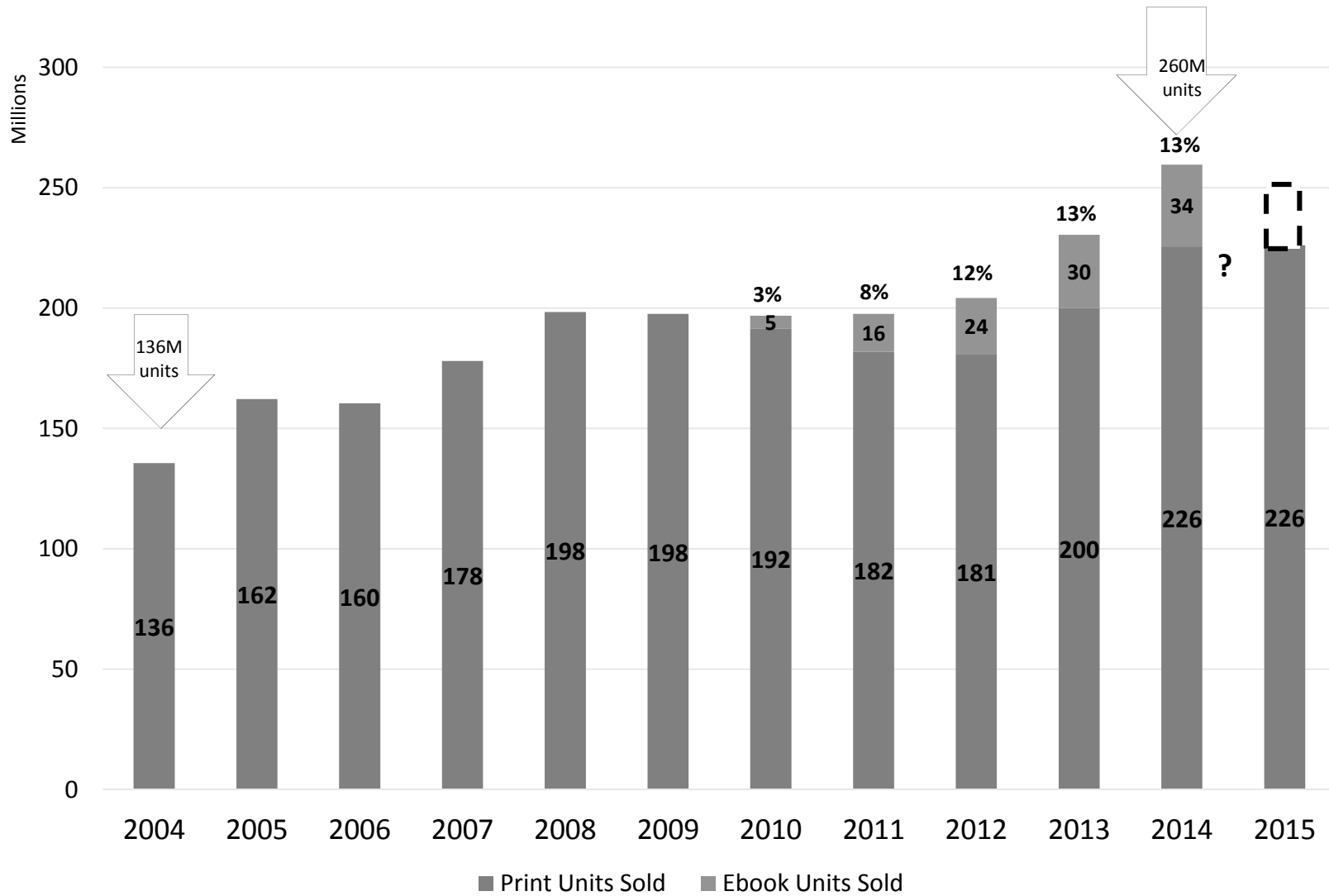


INTERNATIONAL GENRE VOLUME GROWTH



US JUVENILE VOLUME GROWTH – WITH EBOOKS

2004 – 2014 CAGR: 6%



Source: Nielsen BookScan & PubTrack Digital

BOOKSCAN'S US TOP 20 OVERALL - 2013

#	Title	Author	Imprint	Pub Date	2013 Sales
1	HARD LUCK	KINNEY JEFF	AMULET BOOKS	11/1/2013	1,825,931
2	INFERNO	BROWN DAN	DOUBLEDAY BOOKS	5/1/2013	1,400,835
3	KILLING JESUS: A HISTORY	O'REILLY BILL	HENRY HOLT & COMPANY	9/1/2013	1,111,271
4	PROOF OF HEAVEN: A NEUROSURGEON	ALEXANDER EBEN	SIMON & SCHUSTER	10/1/2012	935,998
5	THE HOUSE OF HADES	RIORDAN RICK	DISNEY PRESS	10/1/2013	926,059
6	DIVERGENT	ROTH VERONICA	KATHERINE TEGEN BOOKS	2/1/2012	829,770
7	JESUS CALLING: ENJOYING PEACE	YOUNG SARAH	THOMAS NELSON PUB	10/1/2004	828,531
8	SYCAMORE ROW	GRISHAM JOHN	DOUBLEDAY BOOKS	10/1/2013	700,241
9	THE THIRD WHEEL	KINNEY JEFF	AMULET BOOKS	11/1/2012	667,330
10	HAPPY, HAPPY, HAPPY: MY LIFE A	ROBERTSON PHIL	HOWARD BOOKS	5/1/2013	651,395
11	ALLEGIANT	ROTH VERONICA	KATHERINE TEGEN BOOKS	10/1/2013	646,482
12	LEAN IN: WOMEN, WORK, AND THE	SANDBERG SHERYL	KNOPF PUBLISHING GROUP	3/1/2013	628,776
13	THE FAULT IN OUR STARS	GREEN JOHN	DUTTON BOOKS	1/1/2012	628,005
14	THINGS THAT MATTER: THREE DECA	KRAUTHAMMER C	CROWN FORUM	10/1/2013	600,557
15	DOCTOR SLEEP	KING STEPHEN	SCRIBNER BOOK COMPANY	9/1/2013	564,956
16	THE GREAT GATSBY	FITZGERALD F. SC	SCRIBNER BOOK COMPANY	10/1/2004	564,630
17	AND THE MOUNTAINS ECHOED	HOSSEINI KHALED	RIVERHEAD BOOKS	5/1/2013	561,023
18	FIFTY SHADES OF GREY	JAMES E. L.	VINTAGE BOOKS	4/1/2012	558,046
19	SI-COLOGY 1: TALES AND WISDOM	ROBERTSON SI	HOWARD BOOKS	9/1/2013	542,219
20	STRENGTHS FINDER 2.0: A NEW AN	RATH TOM	GALLUP PRESS	2/1/2007	537,987

Source: BookScan

BOOKSCAN'S US TOP 20 OVERALL - 2014

#	Title	Author	Imprint	Pub Date	YTD Sales
1	THE FAULT IN OUR STARS	GREEN JOHN	SPEAK	4/1/2014	1,708,169
2	DIVERGENT	ROTH VERONICA	KATHERINE TEGEN BOOKS	2/1/2012	1,399,710
3	INSURGENT	ROTH VERONICA	KATHERINE TEGEN BOOKS	5/1/2012	1,240,220
4	ALLEGIANT	ROTH VERONICA	KATHERINE TEGEN BOOKS	10/1/2013	1,083,885
5	THE FAULT IN OUR STARS	GREEN JOHN	SPEAK	4/1/2014	892,687
6	GONE GIRL	FLYNN GILLIAN	BROADWAY BOOKS	4/1/2014	846,624
7	THE FAULT IN OUR STARS	GREEN JOHN	DUTTON JUVENILE	1/1/2012	781,042
8	THE LONG HAUL	KINNEY JEFF	AMULET BOOKS	11/1/2014	699,928
9	KILLING PATTON: THE STRANGE DE	O'REILLY BILL	HENRY HOLT & COMPANY	9/1/2014	685,187
10	LOOKING FOR ALASKA	GREEN JOHN	SPEAK	1/1/2007	661,012
11	IF I STAY	FORMAN GAYLE	SPEAK	4/1/2010	651,264
12	FROZEN	SAXON VICTORIA	RANDOM HOUSE DISNEY	10/1/2013	600,279
13	MINECRAFT: REDSTONE HANDBOOK:	SCHOLASTIC INC.	SCHOLASTIC INC.	4/1/2014	597,286
14	THE MAZE RUNNER	DASHNER JAMES	DELACORTE PRESS BOOKS FOR Y	8/1/2010	588,701
15	MINECRAFT: ESSENTIAL HANDBOOK:	SCHOLASTIC INC.	SCHOLASTIC INC.	11/1/2013	577,180
16	JESUS CALLING: ENJOYING PEACE	YOUNG SARAH	THOMAS NELSON PUBLISHERS	10/1/2004	570,855
17	FOUR	ROTH VERONICA	KATHERINE TEGEN BOOKS	7/1/2014	552,728
18	FROZEN: JOURNEY TO THE ICE PAL	BERRIOS FRANK	RANDOM HOUSE DISNEY	10/1/2013	543,710
19	HARD LUCK	KINNEY JEFF	AMULET BOOKS	11/1/2013	512,219
20	FROZEN: BIG SNOWMAN, LITTLE SN	RABE TISH	RANDOM HOUSE DISNEY	10/1/2013	492,822

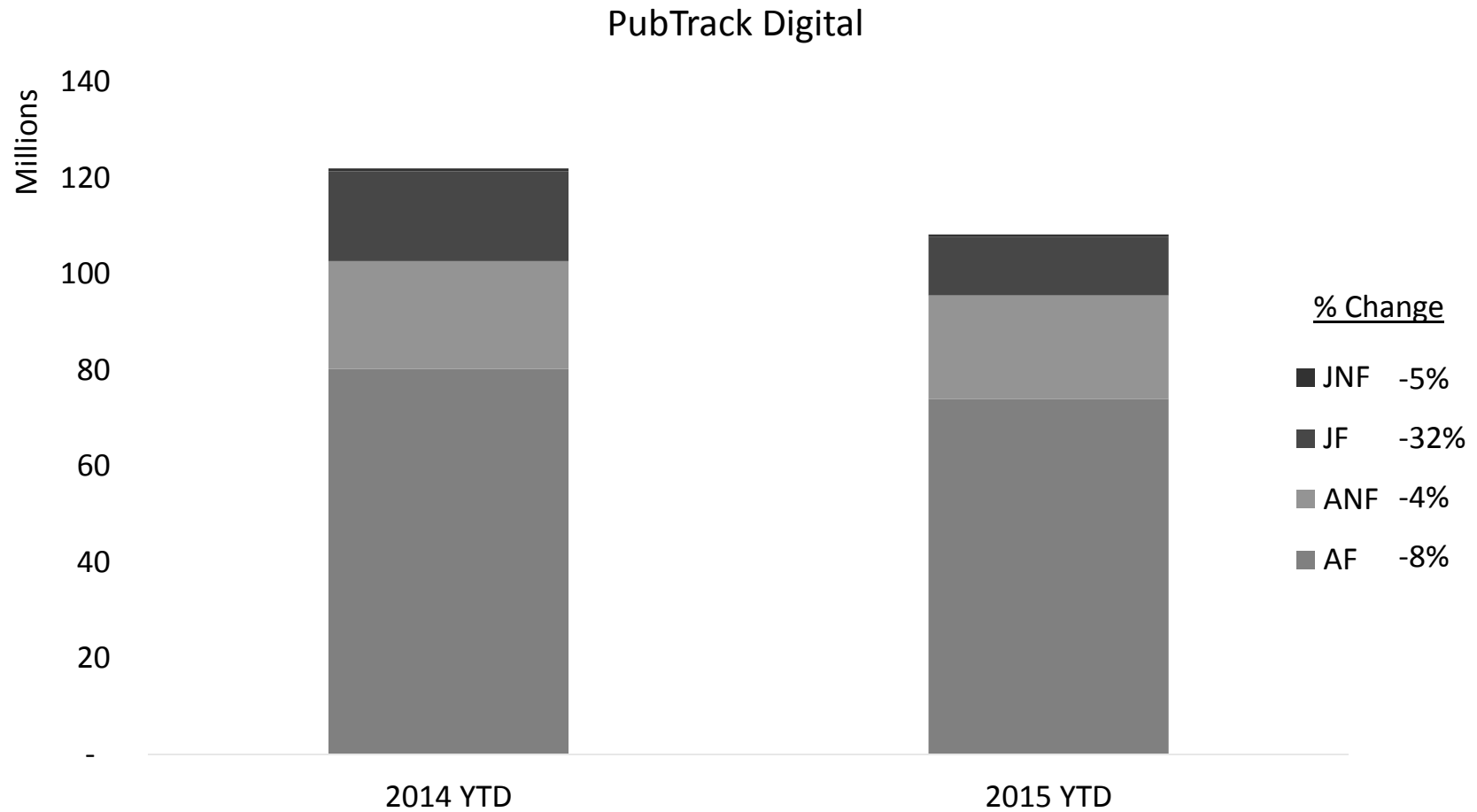
Source: Bookscan

BOOKSCAN'S US TOP 20 OVERALL – 2015

#	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 TID	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: THE VIOLENT AS	O'REILLY BILL	HENRY HOLT & COMPANY	9/1/2015	852,000
9	AMERICAN SNIPER: THE AUTOBIOGR	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: DINNE	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: ENJOYING PEACE	YOUNG SARAH	THOMAS NELSON PUBLISHERS	10/1/2004	545,000
19	THE BOYS IN THE BOAT: NINE AME	BROWN DANIEL JAMES	PENGUIN BOOKS	5/1/2014	532,000
20	STRENGTHS FINDER 2.0: A NEW AN	RATH TOM	GALLUP PRESS	2/1/2007	529,000

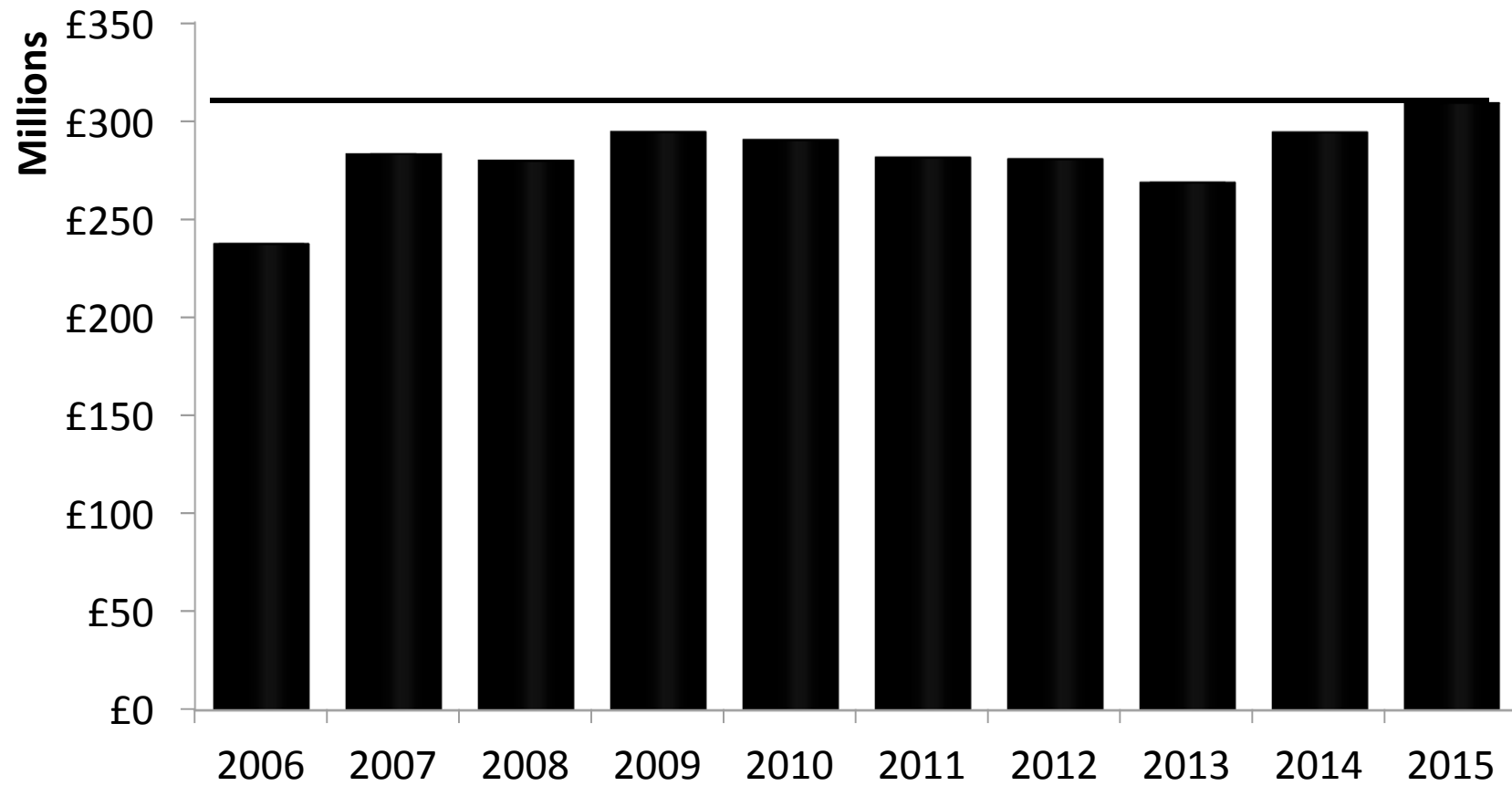
Nielsen BookScan. Highlighted titles are bestsellers in their respective categories.

SUBJECT CATEGORY EBOOKS 2014 YTD VS 2015 YTD

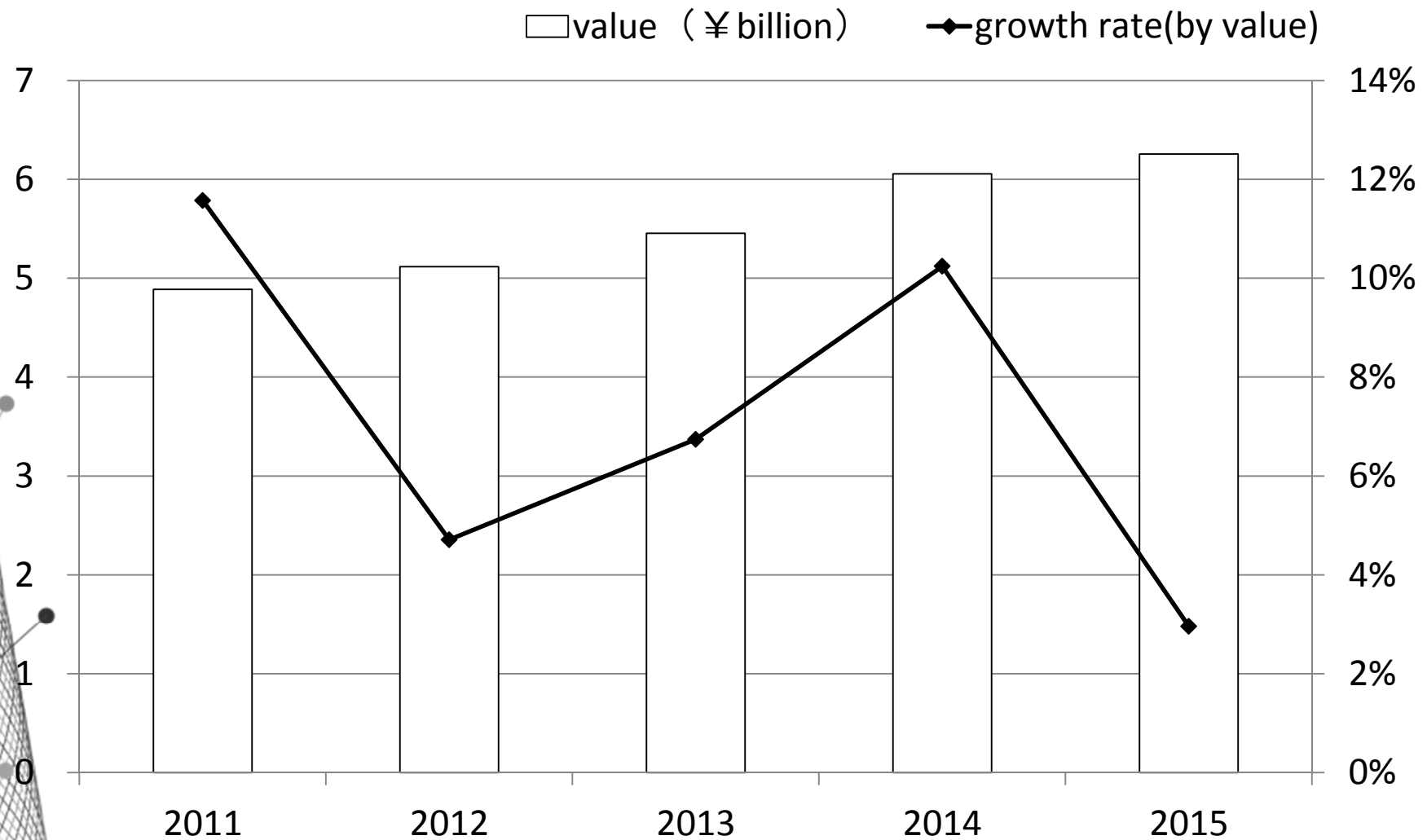


UK JUVENILE VALUE GROWTH

2006 – 2015 CAGR: 2.7%

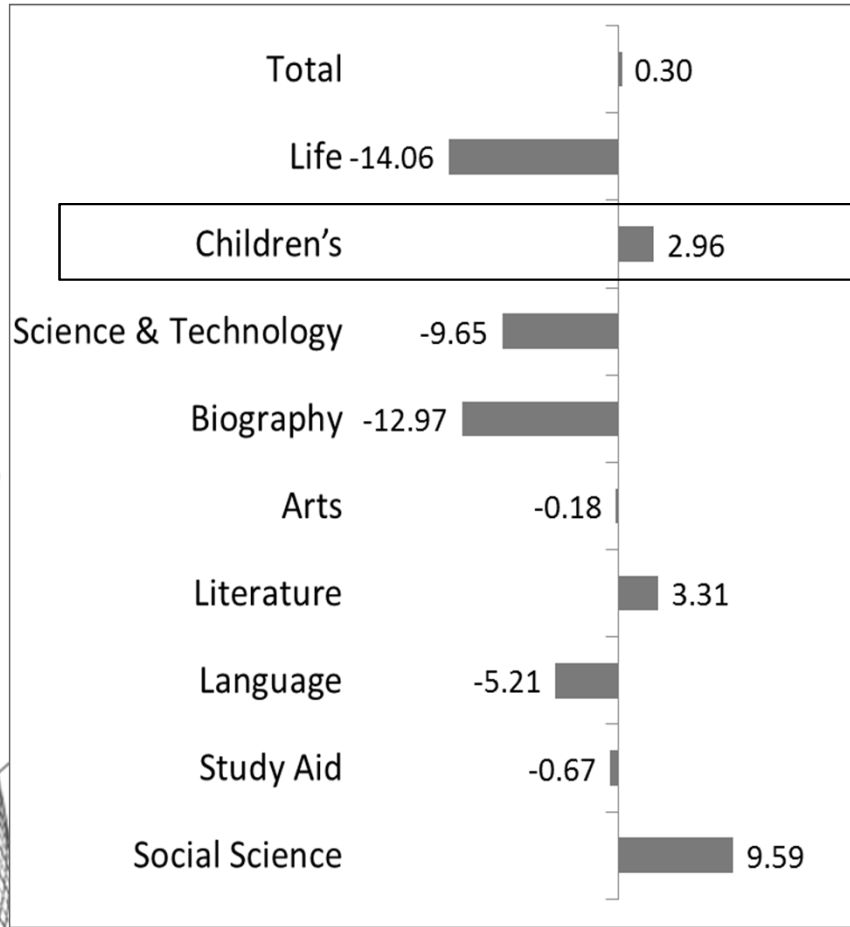


CHILDREN'S VALUE GROWTH IN PHYSICAL BOOKSTORES - CHINA

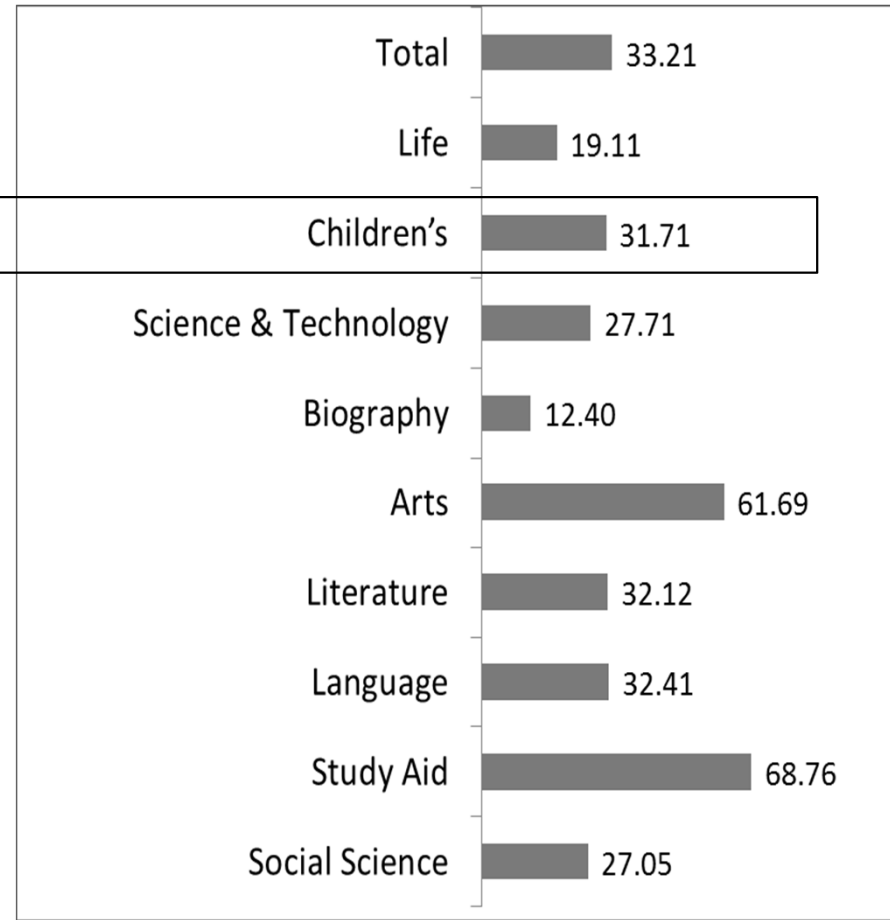


CATEGORY GROWTH IN BRICKS AND MORTAR AND ONLINE BOOKSTORES CHANNELS - CHINA

n

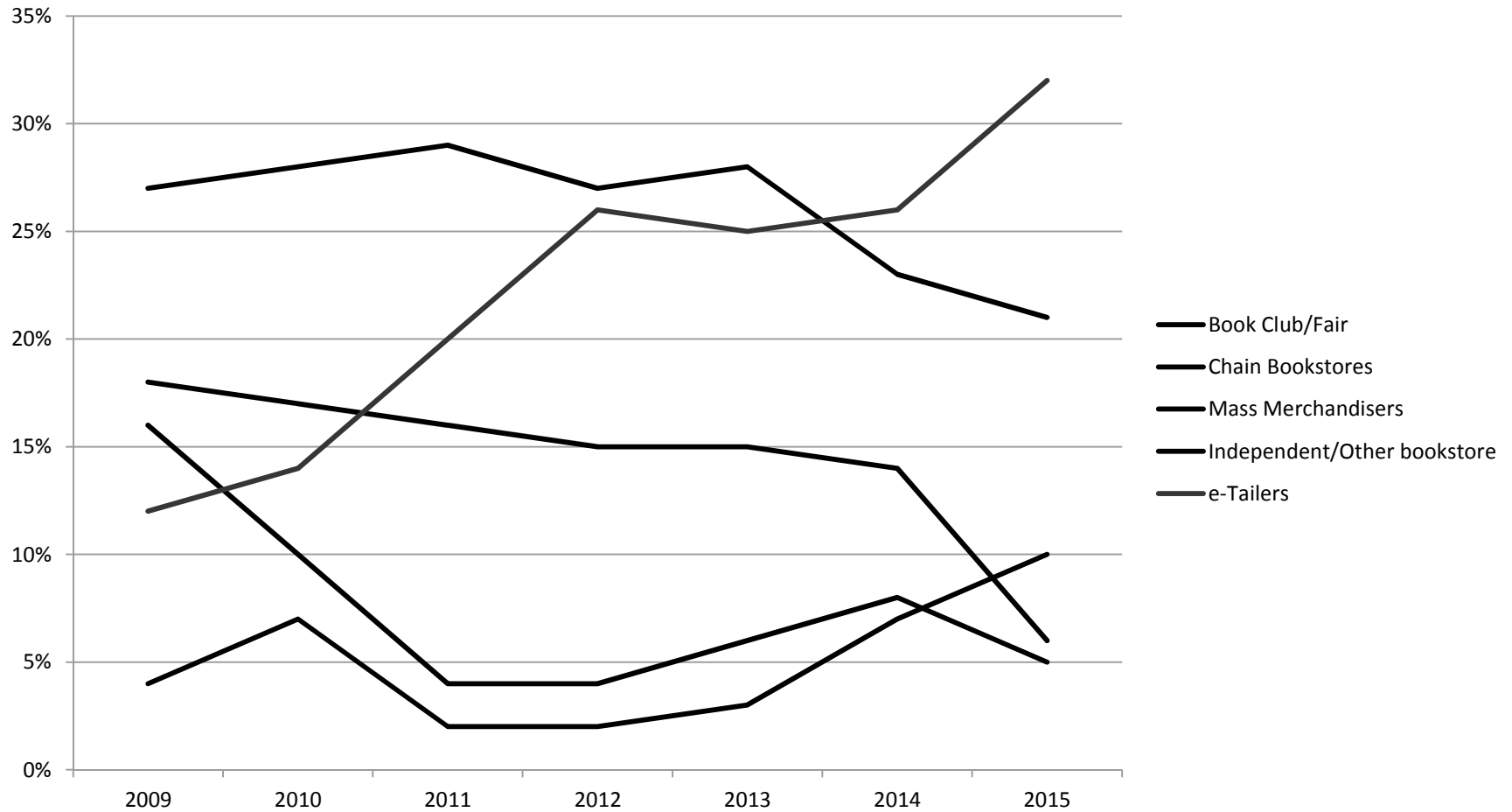


2015 Physical Channel growth rate (%)



2015 Online Channel growth rate (%)

US CHANNEL TRENDS – JUVENILE BOOKS

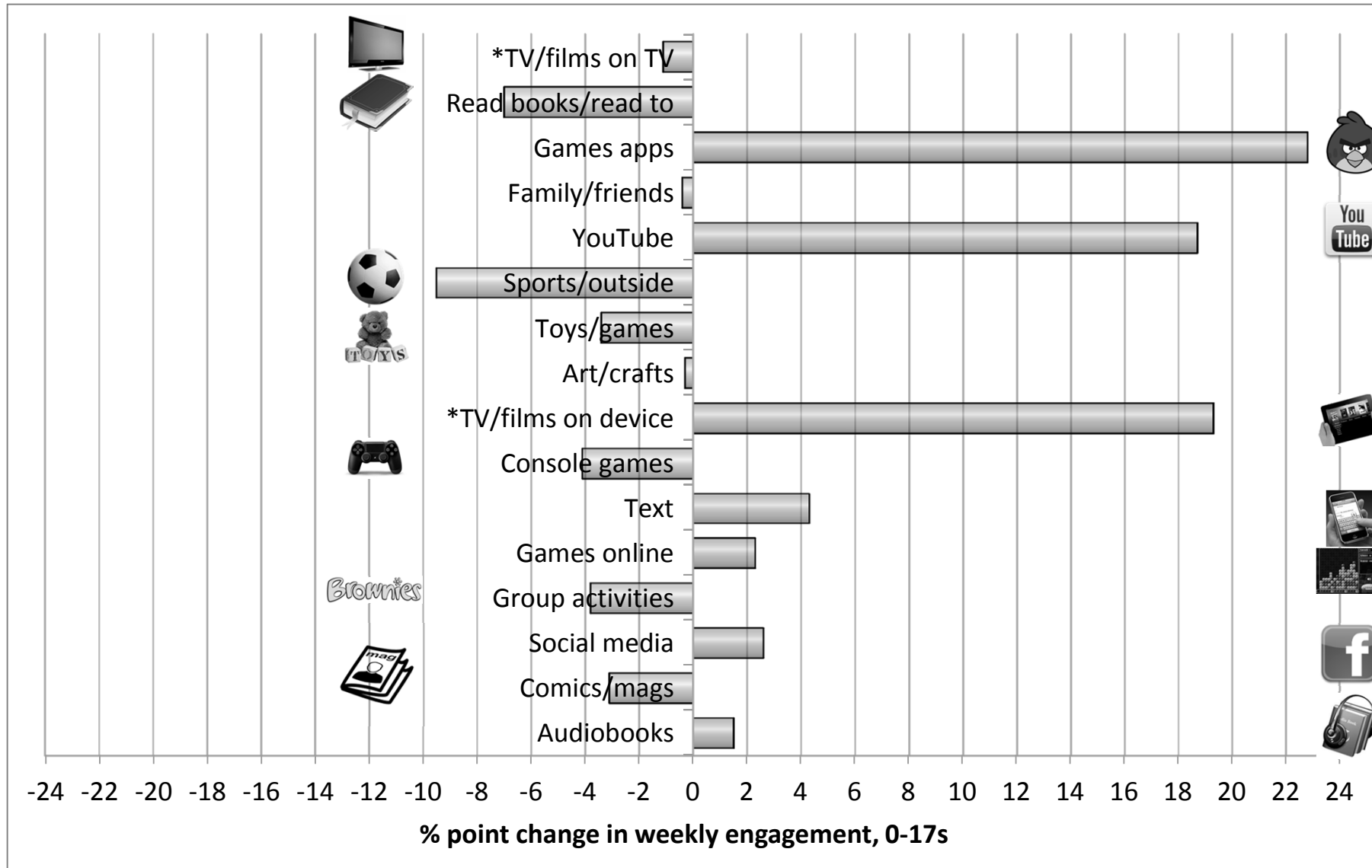


Source: Nielsen Books & Consumer tracker (Annual sample = approx 72K book buyers)

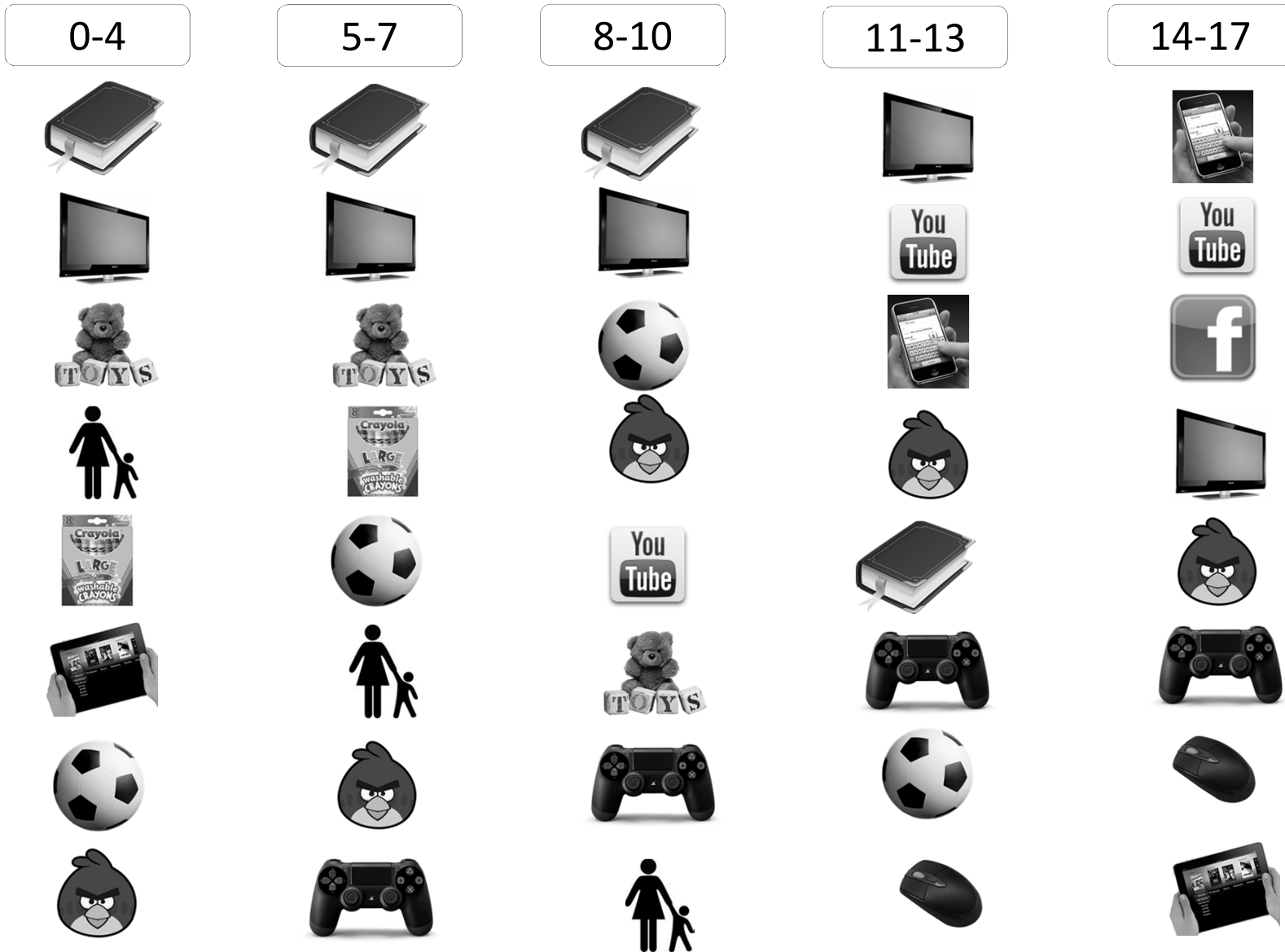


UNDERSTANDING THE CHILDREN'S BOOK CONSUMER

CHANGE IN CHILDREN'S ACTIVITIES: 2012-2015 (UK)



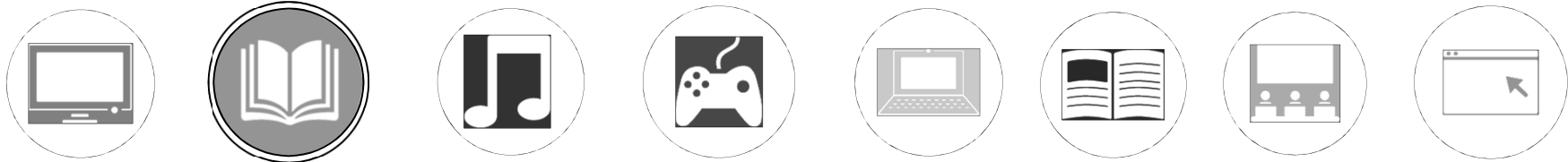
WHERE DOES READING RANK BY AGE - UK



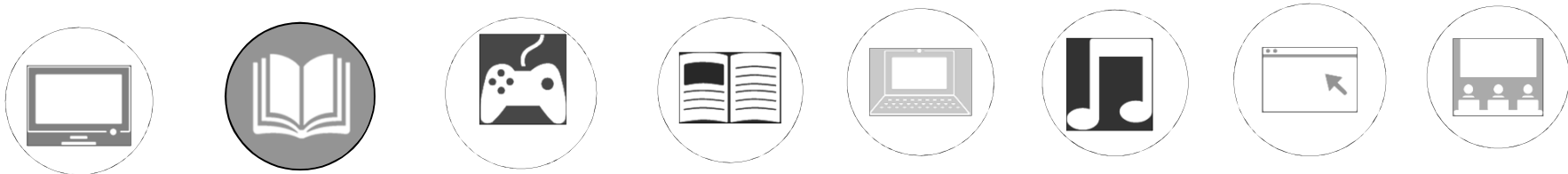
Source: Nielsen's Understanding the UK Children's & YA Book Consumer 2015
 Weekly participation 2015; with exception of YouTube, images are examples to illustrate type of activity, e.g. football represents sport

WHERE DOES READING RANK BY AGE - US

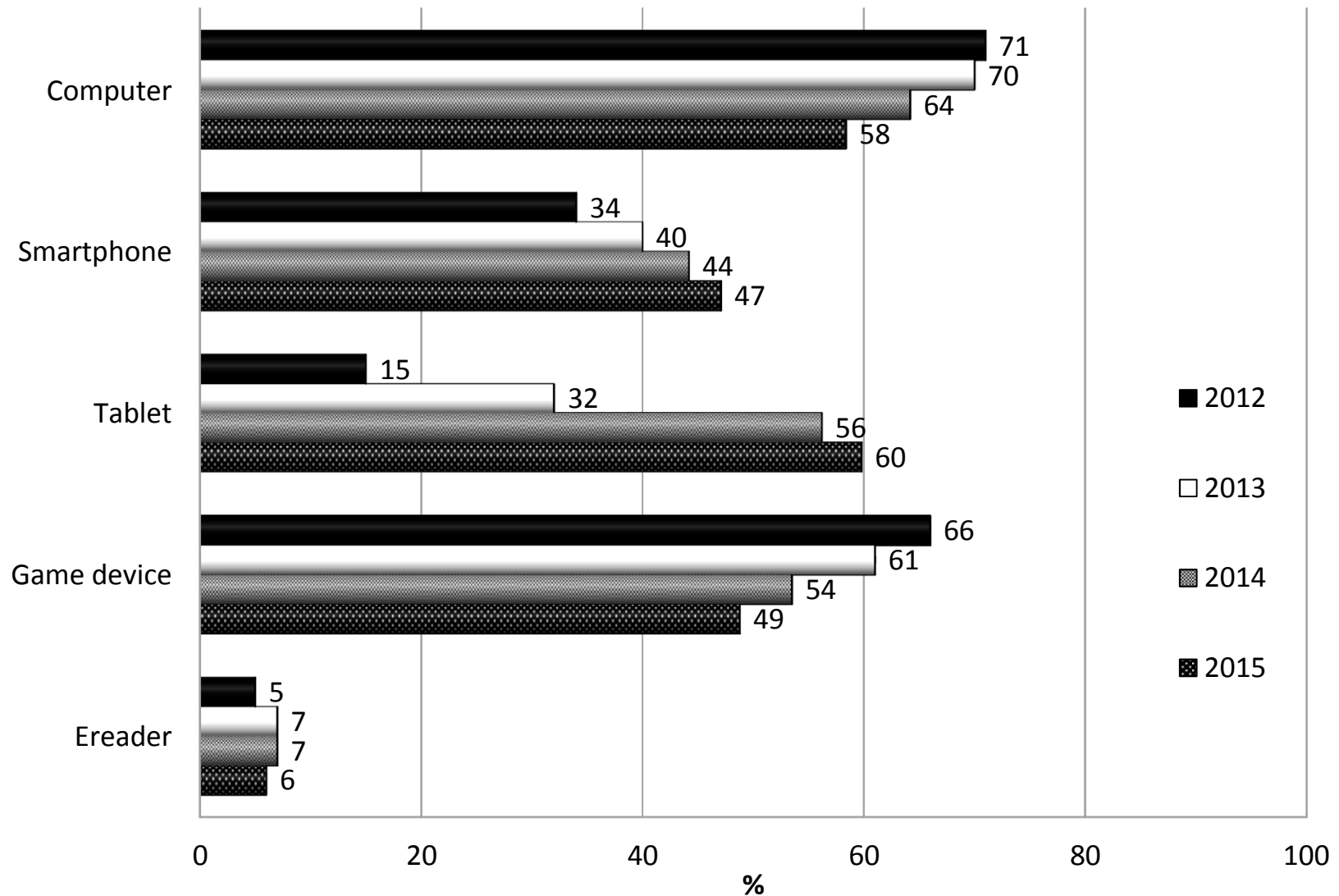
0-6



7-12

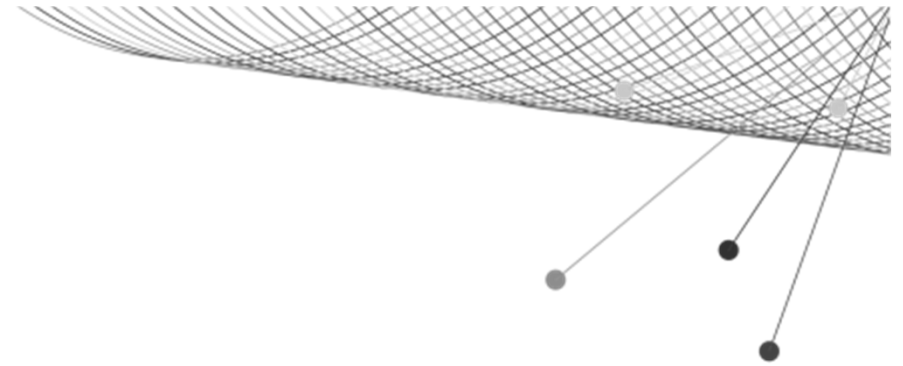


UK CHILDREN'S USE OF DEVICES



SOME FINAL THOUGHTS ... IN SUMMARY

- Most markets are unique – and will remain so
- Print book sales continue to grow...
- ...and are underpinned by growth in Children's categories
- Digital sales – at least in the US – have plateaued at approximately 25% share with Children's Fiction at a 15% share.
- UK and US shoppers now buy almost ½ of all books on-line
- Reading for pleasure continues to decline in popularity as a weekly activity for Children
- ... and with increases in Smartphone device use, this trend may continue



nielsen
.....

THANK YOU

jonathan.stolper@nielsen.com