

# **EXPANDING THE BOOK MARKET:**

## **A study of reading and buying habits in GB**

Prepared by:

**BML**

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## Foreword and acknowledgements

Arts Council England is the national development agency for the arts in England, distributing public money from Government and the National Lottery. We are committed to helping creative organisations develop their businesses and ensuring the public have ever wider opportunities to take part in arts activities.

Reading is a fundamental pleasure to many. However, as the publishing industry recognised in 2003, reading as a pastime was in danger of decline, and for some, reading or buying books was simply not an activity with relevance to their lives.

This research report is the result of a cross-industry partnership of publishers, booksellers, media and Arts Council England, and we are very pleased to be involved. One of the most encouraging findings of the research is that actions that will benefit those who rarely read or buy books may also, it would seem, have an equally positive effect on those already reading and buying. A clear message is that by helping those with few opportunities to engage with books, we benefit the whole sector.

I would like to thank Jo Henry and Leslie Henry of Book Marketing Limited who carried out the research and were instrumental in drawing together the research partners. I would also like to thank the steering group members for their guidance and enthusiasm for the project: Matt Batchelor, Rob Bassett, *Mail on Sunday*; Louise Colling, Borders; Geof Duffield, Claire Round, Macmillan; Lucy Hutton, Arts Council England; Guy Stainthorpe, Malcolm Tenneson, BCA.

Finally, the often unsung heroes of research projects are the members of the public who gave their time to be interviewed. To all the readers, lapsed readers, book buyers and library users who took part – thank you.

Gary McKeone  
Director of Literature, Arts Council England



## Executive summary

Available data<sup>1</sup> on book buying and book reading habits suggests that up to 45% of the population buy few, if any, books and that around 25% of the adult population read very little, if at all. Publishers, book retailers, and other interested organisations - particularly Arts Council England (ACE) - concerned to understand more about the motivations and priorities of those who do little or no buying and/or reading of books, commissioned BML to conduct a comprehensive programme of research aimed at obtaining relevant information to enable the industry to devise strategies and tactics to increase adult participation in book buying and reading.

## Book buying

- ◆ Whilst most adults are relatively happy with their current level of book buying, and few have a real desire to buy any more at present, it does appear that many adults might indeed start or increase their levels of buying under the right circumstance, and/or with the right incentives.
- ◆ Further, any initiative that might have a positive effect among non- and light buyers is as likely to have at least an equally positive effect among medium and heavy book buyers.
- ◆ There is a need to make book buying as simple/easy as possible for both potential and current buyers, providing a good choice of books and/or books perceived to be of good value.
- ◆ Improvements in the access to books is seen as beneficial, with books being made more available through the workplace and also within public libraries, plus – perhaps – outlets such as video stores.
- ◆ Many would welcome both longer opening hours at their local bookshop, and also better selections at outlets such as WH Smith, and airport/station bookshops/bookstalls.
- ◆ Currently most people do not see supermarkets as providing an environment conducive to book buying, as they are not ‘in the mood’ when doing grocery shopping and they are not yet seen as book destination outlets because they have such a limited selection.

However, many feel that if supermarkets had a much better selection they would be a very convenient place to look at (and buy) books.

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<sup>1</sup> Available sources include BML/TNS *Books and the Consumer* data; TGI, Mintel, National Reading Campaign, ONS, various data.

- ◆ There is a need to provide more and better assistance for the choice of book to buy, with the provision of:
  - i advice points situated away from the till
  - ii information on authors who write like other authors
  - iii more - and more precise - book categories and genres - both for adults and children
  - iv lists of bestsellers in more genres
  - v more ideas/information on the suitable age-range or reading level for children's books

- ◆ Apart from attitudes towards the value for money of books, there are considerable issues with pricing and discounts.

The fact that there are so many books being sold at (often quite considerable) discount leads to a feeling that books sold at the full recommended retail price are overpriced.

Potential buyers may well decide to see if the book they are interested in is being sold at a cheaper price elsewhere, and this can lead to lost sales.

- ◆ Some adults have considerable difficulties with the idea of books as gifts, including:
  - i concerns that the book choice will not be appreciated
  - ii general problems with making choices
  - iii often the idea of giving a book does not even cross the person's mind
  - iv the fact that the price is printed on the book makes the cost too obvious for some to use as a gift
  - v the relatively high cost of postage compared to the price of the book.
- ◆ An important improvement for many who might give books as gifts would be an ability for the recipient to return an unwanted book to any bookshop.

## **Book reading**

- ◆ Most adults are happy with the amount of reading for pleasure they currently do. Non-readers tend to prefer other activities, while current readers feel they have a balance of pursuits including reading.
- ◆ The main barriers to reading are:
  - i a preference for other activities
  - ii not enjoying reading books
  - iii Claims of not having enough time
  - iv poor access to a good selection of books
  - v difficulties in selecting suitable books

- ◆ Many adults see themselves starting to read, or reading more, when they are older, become less active/less busy, stop work, etc.
- ◆ Most do not have a problem with the image of reading, but there is considerable belief that this is a problem for younger adults.  
  
Reading has few, if any, role or celebrity models, with people rarely shown reading on TV and in films, and reading is not considered to be a social activity.
- ◆ Many adults do have problems in choosing books for themselves, with considerable belief that the descriptions on (mainly fiction) books are unhelpful, with too many pretentious and untrustworthy quotes.
- ◆ Personal recommendations are the most used and trusted sources of advice on books. Public libraries are also trusted, as are bookshops, on the whole. Press reviews are a less influential source of information.
- ◆ Book programmes can be a very powerful source of advice, though they tend to affect specific choices rather than total amount of reading.

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# 1 Introduction

This report pulls together the information gained from each stage of an extensive study carried out by BML in 2003/04 into encouraging non-, light and medium book buyers and readers to participate more fully in the book market. This introduction is followed by the main conclusions drawn, and then by the principal findings for book buying and book reading separately. Full reports on each stage of the research have been provided to the sponsors of the project; more details are available from BML.

## 1.1 Research programme

The research programme consisted of a number of stages:

- i a quantitative study, using an omnibus survey among 2,000 adults interviewed face to face, to examine how the adult population divides in terms of book reading and buying, and the demographics of different types of reader/buyer: this was conducted in March 2003.
- ii brainstorming sessions with publishers, book retailers, reader development agencies, Arts Council England and other interested parties to look at possible ways of expanding the market. One session dealt with reading, the second with buying: both were conducted in June 2003.
- iii 200 depth interviews with non or light readers and/or non- or light buyers, which were conducted in August/September 2003.
- iv 8 group discussions with non- and light readers and buyers, to examine attitudes to proposed initiatives devised to expand the market: conducted in February/March 2004.
- v a second omnibus quantitative study among 2000 adults, conducted online, to investigate attitudes and behaviour within the adult population as a whole, in so far as they related to particular topics synthesised from the results of the previous stage of the research: this phase was undertaken in June 2004.

A steering group, comprising a number of people representing the sponsors, was consulted regularly throughout this programme of research.

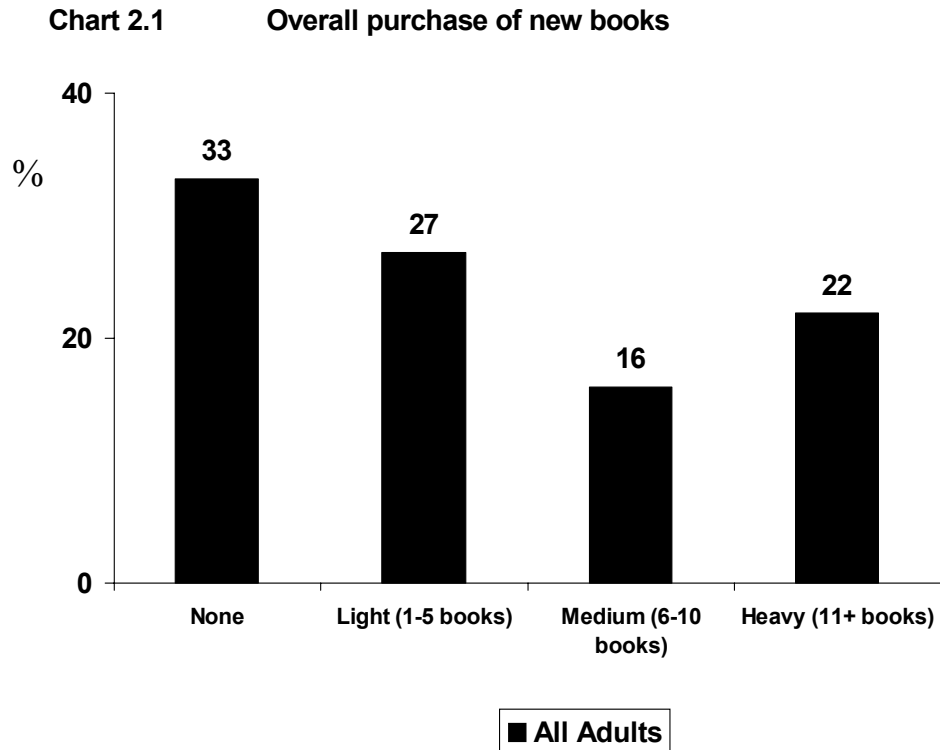
BML would like to thank all the sponsoring companies and in particular Arts Council England for their very generous funding. BML would also like to thank the following companies for providing members of the steering committee: Arts Council England, Macmillan, Borders, BCA, The Mail on Sunday.

## 2 Book buying

### 2.1 The state of the market overall

#### 2.1.1 New books

The initial phase of the study consisted of an omnibus of 2,000 adults who were questioned face to face. This provided an estimate of the number of books bought new by adults<sup>3</sup>, which allowed the market to be divided into four basic segments, as shown in Chart 2.1.



<sup>3</sup> The basic question used was: *In the last 12 months, approximately how many books did you buy for yourself or to give to other people? I mean books bought new, not second-hand.*

In line with other surveys conducted in the past, including those by BML and TGI, women bought more books than men, and book-buying increased with socio-economic group and terminal education age, while those age 65 or over were the least likely age group to buy at all (Table 2.1.1a).

**Table 2.1.1a Overall purchase levels, by demographics**

		<b>Non-buyer</b>	<b>Light 1-5</b>	<b>Medium 6-10</b>	<b>Heavy 11+</b>	<b>Average no. of bks bought pa</b>
All	%	33	27	16	22	8
Male	%	36	28	16	19	7
Female	%	30	26	16	25	9
16-19	%	31	34	20	12	5
20-24	%	24	36	18	20	6
25-34	%	29	26	20	25	11
35-44	%	25	24	21	28	11
45-54	%	32	29	17	22	9
55-64	%	32	23	17	26	10
65+	%	51	26	7	13	5
AB	%	14	26	20	39	13
C1	%	20	28	21	29	11
C2	%	39	26	17	15	7
DE	%	52	28	9	11	5
Child in household	%	26	28	18	26	9
No child in household	%	37	27	15	20	8
<i>Terminal education age</i>						
Still studying	%	16	35	23	24	7
16 or under	%	44	27	14	14	6
17-18	%	22	31	19	25	9
19+	%	16	23	22	40	16
<i>Working status</i>						
Full Time	%	28	26	19	25	10
Part Time	%	23	22	27	26	10
Not working	%	34	28	18	20	7
Retired	%	45	28	10	17	6

NB Don't know not shown  
Base: all adults (2,000 sample)

Table 2.1.1b indicates the extent to which people buy books for themselves and for other people. The level of buying for others is approximately two-thirds of that of buying for oneself.

Women are more likely to buy books for other people, and this, we can assume, is mainly accounted for by the purchase of books for children.

**Table 2.1.1b Book buying for self and for others in last 12 months**

	<b>All</b>	<b>Men</b>	<b>Women</b>
	<b>%</b>	<b>%</b>	<b>%</b>
<b>Buy for self</b>			
Don't buy for self	46	48	45
Light buyer (1-5)	29	29	27
Medium buyer (6-10)	10	10	10
Heavy buyer (11+)	13	12	15
<i>Average number of books bought</i>	5	5	6
<b>Buy for others</b>			
Don't buy for others	50	57	44
Light buyer (1-5)	30	29	33
Medium buyer (6-10)	9	7	10
Heavy buyer (11+)	8	6	10
<i>Average number of books bought</i>	3	3	4
Don't buy at all	33	36	30
Buy for self and other	35	30	38
Buy only for self	18	24	14
Buy only for other	14	10	18
<i>Average number of books bought</i>	8	7	9

NB Don't know not shown  
Base: all adults (2,000 sample)

### 2.1.2 Second-hand books

Apart from the purchase of new books, during the depth interviews respondents were asked about their purchasing of second-hand books.

15% of those who didn't buy new books said they had bought second-hand books – approximately 7 per year on average, of which 6 were for themselves and 1 for a child.

Around one third of the light buyers and two-fifths of the medium buyers said they also bought second-hand books, though the average number bought was lower (2.5 per year on average) than among those not buying new books at all.

## 2.2 Buying history

Just under half the non-buyers (ie those who had not bought a new book in the previous 12 months) who took part in the depth interviews had at some time bought new books as adults, mainly when they had young children, for their own educational needs or when specifically asked to, as a gift.

All but one of the 18 non-buyers who took part in the focus groups had bought new books at some stage, principally as gifts (especially for children) or holiday reading: none had bought regularly or more than just a very few in any one year.

None of the light buyers who took part in the focus groups had ever bought significantly more books in the past, though several said they were non-buyers until they had children of their own.

## 2.3 General attitudes

The research programme investigated the extent to which people might be persuaded to start buying new books, or encouraged to buy more, both in general and in the light of specific initiatives (see Section 3).

In the final quantitative stage it was suggested to non-, light and medium buyers that companies might be able to *make it easier to find, choose and buy books, perhaps with different places or ways to buy, more and better advice, and so on.*

Asked to indicate the effect this might have on their buying behaviour, nearly half of the current non-buyers felt they were unlikely to move into the market regardless of possible changes, while a similar proportion of light buyers also did not see anything having an impact on their level of purchases.

However, around one in eight non-buyers said they could see themselves being persuaded to buy new books if it was made easier for them to do so, either through extended book sources or better information about books, whilst a reduction (unspecified) in price was of interest to approximately two-fifths.

Similarly, half the light buyers felt they might increase their levels of purchase, with 50% likely to be affected by more general changes and 50% by price reductions.

Those who were already medium buyers were even more likely to be affected, with nearly half saying they might increase their purchasing if they had better/more convenient access and over a third saying this if books were cheaper.

The implication behind these data is that whilst the majority of non-buyers might be termed 'definite' non-buyers, there is potential for encouraging purchases among a significant minority with the right incentives.

The qualitative research revealed that the main circumstances in which non-buyers thought they might buy new books at some time in the future<sup>6</sup> was most likely to be buying books for children, whether their own or other people's – few mentioned buying for themselves.

In the depth interviews approximately two thirds of the light buyers, but only one in seven of the medium buyers, could see themselves buying more books in the future – again buying for children was likely to be a particularly strong stimulus, as was gaining better access to cheaper books.

## 2.4 Reasons for not buying at all

There are many reasons why people do not buy new books, and although there are common threads, these vary somewhat depending on who the books might be for.

### 2.4.1 Books for self

Approximately a quarter of the non-buyers were also non-readers, so that often their answers were along the lines of:

*I have no reason to buy any books, as I don't read.*<sup>7</sup>

Other common reasons for not buying involved the cost of books, the ability to borrow, getting books as gifts – and occasionally wanting books which were out-of-print.

**Table 2.4.1 Major reasons why new books not bought for self**

	%
Don't read at all	26
New books too expensive	21
Can borrow all I need from library	18
Get given books	15
Buy 2nd hand	15

Base: 68 non-buyers

Typical comments included:

*The price of new books is not good. Even paperbacks are a minimum of £6 these days, and most of the ones I want would probably be more than that. As for hardbacks, well, they seem to cost £15 or more.*

<sup>6</sup> This subject was covered in the depth interviews ahead of any discussion on possible changes/initiatives.

<sup>7</sup> This is excluding information books, which they might already own, buy or be given very occasionally.

*The library is convenient and free – especially if I start a book and don't get on with it.*

*I have a circle of friends who lend me their books – and sometimes people at work do too.*

*I have got lots of books at home, so if I don't get to the library I can always reread the ones I have.*

*I get given books all the time, so I don't need to buy any myself. The sort of books I read are not usually available. You very rarely find the westerns and adventures – they tend to be older and out of print. So my best hope is the library or second-hand – jumble sales, car boot sales – but they are difficult to find.*

#### 2.4.2 Books for other adults

Overall, cost was the reason mentioned most often for not buying new books for other adults (Table 2.4.2):

**Table 2.4.2 Major reasons why new books not bought for other adults**

	%
Never think of it	31
All new books too expensive	26
Hardbacks too expensive	25
<i>Any mention of cost</i>	46
No one asks me to	22
Don't know what to get	21
Price is too obvious	15
Too many discounts – makes books look cheap	9

Base: 68 non-buyers

Typical comments included:

*It is not something that actually occurs to me. I suppose if I saw a book that I knew someone would really like and I wanted to get them something, then I might do so, but to be honest it doesn't cross my mind.*

*Frankly, books are too expensive, especially hardbacks, which are probably what I would give if I was going to. Paperbacks don't look so great, but hardbacks are really bad value.*

*No one ever asks me to get them books, so I have no need to. I wouldn't know what to get unless I was told.*

*I have tried to give my wife books in the past, but they have not been all that successful.*

*It is a question of how to choose a book for someone else. I like to give surprises, and that makes it rather difficult. I have occasionally bought a book, something I knew they would like – cookery or gardening.*

*The trouble with books is that the price is too obvious – people know what they cost – unless you get it cheaper. It is a bit too much like money.*

*I have given books before, and also got them. Nowadays so many books are sold at a discount that it seems rather a cheap way of giving – either that or you feel you have paid too much.*

### 2.4.3 Books for children

There were a variety of reasons given for not buying new books for children, with none dominating, and with several respondents mentioning more than one (Table 2.4.3).

**Table 2.4.3 Major reasons why new books not bought for children**

	%
Children prefer other presents (general)	24
Easier to give other presents	22
Children's books too expensive	21
Don't know what to get/how to choose	21
No children to buy for	16
No one asks me to	15
Prefer giving money	12

Base: 68 non-buyers

*I have given books to children, but my feeling is that they really like other things more – at least mine do.*

*It is difficult to know what book to get – have they read it? Will they like it? So, I play safe and give them money, or something with their latest craze – even clothes, make-up, jewellery, that sort of thing.*

*Children's books are very expensive now, for how little they are.*

*I just don't know what to choose any more. All the books I liked as a child seem to be out of fashion, and I don't know the newer ones.*

*I haven't really got any child who wants me to get them books.*

*I prefer to give him money now, so he can choose what he wants to buy. It is simpler and probably a present he prefers.*

## 2.5 Reasons for not buying more new books

Those respondents who bought books at all were asked why they did not buy more new books, specifically for themselves, for other adults and for children.

### 2.5.1 Overall reasons for not buying more new books

Just over half of these respondents said that they did not want or need to buy any more books, with this being truer among medium than light buyers. Being able to borrow books was the second most important reason given, with a number of other factors important to significant numbers of buyers.

Given that 26% of light and 50% of the medium buyers were also non-readers<sup>8</sup>, it is not easy to explain why so few gave that as a reason for not buying books, though it would appear some non-readers were happy to buy books to give to other people.

**Table 2.5.1 Major reasons for not buying more new books in general**

	%
I buy all the books I want/need to	52
I borrow books from a library	32
I borrow books from other people	17
<i>Borrow – any</i>	46
Books are not good value	24
Books are not something I want to give as a gift	20
Don't read books	19
Buy (cheaper) second-hand books	17
Don't have time to read any more	13

Base: 104 light and medium buyers

### 2.5.2 Reasons for not buying more books for self

Clearly, non-readers don't need to buy books for themselves, and 34% of all light and medium book buyers gave this as the reason for not buying more books. Being able to borrow books was also a significant reason for not buying more, cited by 33%, whilst 31% felt they were buying all they wanted to (Table 2.5.2).

Few respondents indicated they had difficulties finding or getting hold of books they wanted to buy for themselves.

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<sup>8</sup> The sample was so constructed to produce an over representation of non-readers among the buyers.

**Table 2.5.2 Major reasons why not buy more new books for self**

	%
Don't read books	34
Borrow from library	33
Borrow from other people	21
<i>Borrow – all</i>	44
Buy all I want/don't need more	31
Buy (cheaper) second-hand books	17
New books are quite expensive	14
Other people buy for me	13

Base: 104 light and medium buyers

**2.5.3 Reasons for not buying more books for other adults**

Cost was again, as with non-buyers, the most important factor. It was very noticeable how many respondents, especially light buyers, said it just did not occur to them.

There were considerably higher proportions of respondents having problems choosing/finding suitable books for other adults than for themselves, with 13% saying this was an issue for them.

**Table 2.5.3 Major reasons why not buy more new books for other adults**

	%
Never think of it	27
Buy all I want to	26
Hardback books are expensive	23
Books are expensive in general	13
<i>Any mention of cost</i>	32
Books are not something I want to give as a gift	19
Difficult to choose for others	17
I have trouble finding books I want to buy for other adults	13

Base: 104 light and medium buyers

**2.5.4 Reasons for not buying more books for children**

While significant numbers had no children to buy for, there were several other reasons of fairly similar levels of importance, including price, difficulty in choosing and the perception that books were felt to be unsuitable as gifts preventing buying more books for children (Table 2.5.4).

**Table 2.5.4 Major reasons why not buy more new books for children**

	%
Never think of it	26
Buy all I want to	25
No children to buy for	24
Children's books are expensive/poor value	20
Books are not something I want to give as a gift to children	14
Difficult to choose for children	14
I have trouble finding children's books I want to buy	11

Base: 104 light and medium buyers

## 2.6 Possible/actual lost sales

### 2.6.1 Wait for paperback

Around 4 in ten respondents in the final, quantitative, stage said that in the past year or so they had been interested in a book published in hardback but had not bought it because they decided to wait for the paperback edition<sup>9</sup>. Even a few of the non-buyers made this claim, and it was fairly common among buyers of all types.

### 2.6.2 Looking for discount

A similar percentage said that in the past year or so they had not bought a book they wanted to when they first saw it as they anticipated finding it cheaper elsewhere – and then didn't buy it at all.

### 2.6.3 Problems in choice

Problems in choosing books (whether for self or others) appeared to be an obstacle to purchase for two fifths of adults (Table 2.6.3), although smaller proportions of non-buyers gave this as a reason; other issues were of greater significance to them.

**Table 2.6.3 Whether put off by problems of choice**

	Weight of purchase				
	All	None	Light	Medium	Heavy
	%	%	%	%	%
Yes – for self	13	14	15	13	8
Yes – for other adults	32	22	37	43	34
Yes – for children	19	14	20	22	21
<b>Yes – at all</b>	<b>41</b>	<b>28</b>	<b>49</b>	<b>50</b>	<b>44</b>

Base: all adults

<sup>9</sup> Whether or not respondents subsequently bought the paperback edition was not investigated.

## 2.7 Books as gifts

### 2.7.1 Qualitative information

#### **a Non-buyers' attitudes**

Three-quarters of non-buyers involved in the depth interviews said that they might buy books as gifts under particular circumstances, with the two most common being:

*Someone I know really wants a particular book, and I can't think of anything else*

*If I have children of my own.*

The other 25% of non-buyers said they preferred to give other items, feeling books were poor value for money and saying they had difficulty in choosing. In addition, they felt:

- i it showed a lack of imagination on the part of the giver
- ii books were too easily priced by recipients
- iii they would want to give a hardback, which would be expensive and/or poor value for money

*I don't feel that giving a book shows you have given much thought to it. You either give a book you know, which is a bit of a cop-out, or you give one you don't, which is risky, and may be seen as panicky.*

*Giving books is a bit like giving money – the amount is too obvious.*

*If you want to give a book as a present, then it ought to be in hardback, which are expensive and quite poor value. Paperbacks are not – to my way of thinking – really good enough as presents.*

#### **b Light/medium buyers' attitudes**

As with non-buyers, around 25% did not consider books to be something they wanted to give as gifts, with a few saying that they would only give them as a last resort. Objections to books as gifts were similar, with added comments about *children's books looking poor value for money*, and the *costs of postage/getting the book to the intended recipient*.

### 2.7.2 Quantitative information

At the final omnibus stage, nearly half of all adults said they were quite happy choosing books to give to other people, with only 10% overall saying that it rarely, if ever, occurred to them to give books as gifts (Table 2.7.2).

**Table 2.7.2 Attitude towards books as gifts**

	Weight of purchase				
	All	None	Light	Medium	Heavy
	%	%	%	%	%
Quite happy choosing	47	20	51	56	74
Prefer to give token or money	24	39	20	16	15
Reluctant in case people do not want them	23	33	23	18	12
Would like to, but find it difficult to choose	19	13	24	26	15
Rarely, if ever, occurs to me	10	22	6	5	3

Base: all adults

However, only 20% of non-buyers, compared to 50% or more of other buying groups, were happy to choose books for other people, and over a third saying they preferred to give tokens or money, being reluctant to give books in case the recipient didn't want them.

Those respondents who were not happy choosing/giving books as gifts were asked which of a number of possible initiatives to encourage gift purchasing would help them. Whilst 11% said that none would, the most popular approach was the ability to return and exchange a book to almost any bookshop, assuming it to be in resalable condition, given by 60%: although this facility does exist to some extent, most of these respondents appeared not to be aware of it.

There was also solid support for a number of other initiatives such as the ability to find out about authors similar to other writers, clearer guidance on the suitability of a book for a child's age and more best-seller lists within book genres.

## **2.8 Value for money**

### **2.8.1 Rating of value for money**

Overall, respondents in the depth interviews tended to think that hardback books did not represent very good value for money, whilst paperbacks were seen as fair to good value (Table 2.8.1).

Opinions on the value for money of hardbacks did not vary much according to the number of books bought by respondents. However, greater proportions of light and medium buyers thought that paperbacks represented good value for money than did non-buyers.

**Table 2.8.1 Perceptions of value for money**

	<b>None</b>	<b>Light</b>	<b>Medium</b>
<i>Base:</i>	68	70	34
	%	%	%
<b>Hardback books</b>			
Very good (+2)	4	6	9
Fairly good (+1)	15	16	18
Average (0)	16	13	18
Not very good (-1)	17	39	32
Very poor (-2)	19	19	15
Varies (0)	16	6	6
Don't know	12	3	3
<b>Mean score</b>	<b>-0.4</b>	<b>-0.5</b>	<b>-0.3</b>
<b>Paperback books</b>			
Very good (+2)	4	24	26
Fairly good (+1)	34	33	35
Average (0)	24	24	24
Not very good (-1)	16	9	6
Very poor (-2)	0	4	3
Varies (0)	10	3	3
Don't know	12	3	3
<b>Mean score</b>	<b>+0.3</b>	<b>+0.7</b>	<b>+0.8</b>

### 2.8.2 How value is judged

It was clear that few had ever given much thought to how they judged the value of books. It was an instinctive feeling rather than a reasoned one, so that there was a considerable degree of rationalisation involved:

*I am not sure really – it is not something I have thought about. You have a feel for whether something is good or poor value, and don't think about it much.*

*I cannot say I have given it much thought. I just feel that £20 for a new hardback book is a lot of money.*

There were no significant differences between the non-, light and medium buyers in terms of what people compared book value to, although there were some in terms of how well book value compared. People judged value by:

- i how much use or enjoyment they would get for the money compared to other items
- ii how they felt books had risen in price compared to other items
- iii how thick the books were/how much reading they had in them.

*I suppose it is whether by spending the money I am getting enough benefit from it, or would I do better spending it on something else.*

*Some books are much thicker than others, yet cost the same. It makes you wonder why.*

When pressed as to what they compared books to, approximately half said they did not compare them to anything in particular:

*I don't look at the price of book and say – I could get this or that for less, or the same. It is just more of a gut feel.*

However, others gave a wide list of products and services to which they compared the price of books (Table 2.8.2), with music CDs and tapes being most commonly given by non- and light buyers, followed closely by videos and DVDs.

**Table 2.8.2 Major items<sup>10</sup> book value is compared to**

	<b>None</b>	<b>Light</b>	<b>Medium</b>
<i>Base:</i>	74	34	28
	%	%	%
Nothing	49	50	38
Music/CDs/tapes	31	33	44
Videos/DVDs	29	32	44
Watching TV	26	13	9
Cinema tickets	21	11	12
Newspapers	21	29	24
Magazines	19	21	21
Second-hand books	15	14	32
Listening to the radio	13	4	9
Meal out	12	14	15
Drinks in bar/pub	12	17	9
Time on the Internet	4	11	3
Games (electronic)	1	19	15
Games (board, etc)	1	9	21

For many of these items there was no consistent connection between what people compared book value to and how they actually thought about the value. People who compared books to CDs, videos, cinema, press, drinks, etc. had very mixed opinions on how good the value of hardbacks or paperbacks were.

There was a link when people compared books to items which are essentially free to them – TV viewing<sup>11</sup>, radio listening, some museum visits – where books were considered relatively poor value. Those who compared new book prices to second-hand books and time on the Internet also felt books to be relatively poor value, while the reverse was true in terms of meals out and theatre tickets.

<sup>10</sup> Other items not shown include theatre/ballet tickets, museum visits, going to sports events, playing sport.

<sup>11</sup> The capital costs of buying the TV and of the licence were not considered, only the marginal costs of running the TV.

Comments about relative values included:

*I buy a fair number of CDs, and listen to them over again, and think that £12 spent on a CD which I will listen to for many hours over the years is better than the same amount on a book I'll read just once.*

*With videos, you get something that will give you and others greater enjoyment and use over time than any book is likely to.*

*If you think about going to the cinema, which costs about the same as the price of a paperback, then books are OK value – and with the cinema you have to get there, you may want a drink, etc, The only thing is that the cinema is something you do as a social event – you go with someone else, maybe a group.*

*The hours you get from the book, and the ability to reread or reuse it means that they are quite good value really when you consider how little there is in a paper. The thing is with the paper that each one is cheap, so you don't notice the expenditure.*

*I just think that what you get from the price of a magazine is better than what you get from a new book.*

*I get as much fun out of TV, which is sitting there and might as well be used, as it doesn't really cost to have it on.*

*The radio is free – once you've bought it, so of course it is better value.*

*A meal out is very expensive these days, so books look pretty good in comparison, even hardbacks.*

*Theatre tickets costs a bomb these days – easily £30, maybe more. I cannot afford to go anymore, it is no joke – so books are really not so expensive. It didn't use to be so bad.*

*I can go round a museum for free, which is brilliant value.*

*I have to use the Internet, so surfing for fun is free – hours of enjoyment and relaxation for nothing – you can't get better value for money. Books are not the only things to lose out.*

While approximately half made the same sort of value judgements about different types of book – in terms of genre/content – others felt there were significant differences. Most commonly, reference books were deemed of better value than novels since they could be kept and used for a long period of time, whereas most novels had only a limited use/lifespan:

*Undoubtedly books like dictionaries are good value, when you think about how long they last. I've got a dictionary I've had for 20 years, and it is still good enough for me. Most ordinary books you read once then never look at again.*

Some felt that books which were or were likely to be best-sellers tended to be cheaper (and often discounted) and better value than less popular books:

*What I think happens is that if a book is going to sell well the shops will cut its price, whereas the books I might be more interested in remain at full price.*

### 2.8.3 Change in value over time

Substantial numbers felt that the value for money of books had changed in recent years, mainly for the worse – a situation which varied somewhat according to the level of purchase.

**Table 2.8.3 Has book value for money changed in recent years?**

	None	Light	Medium
<i>Base:</i>	74	34	28
	%	%	%
Yes	56	47	38
No	32	47	62
Don't know	12	6	0
Better value now	9	7	3
Poorer value now	47	40	35

Those who felt that value had lessened gave three types of reason:

- all prices had gone up, and books were no exception
- book prices had risen above the inflation rate
- hardbacks had been rising quickly (perhaps to pay for discounts).

## 2.9 Factors in book choice

In the depth interviews, light and medium buyers were asked to rate the importance to them of 21 factors in general in their choice of book to buy, using a scale from 1 (not at all important) to 10 (extremely important).

As can be seen from Table 2.9, the author was the most important factor overall, for both light and medium buyers, and indeed there was a great deal of similarity between the two groups.

Medium buyers generally rated each factor higher than light buyers: taking that into account, the following factors show real differences between the two buyer groups:

More important to medium than to light buyers

Description of book on the cover      Familiar series  
Cover design      Book promotions in stores  
Reviews in press      Reviews on TV/radio  
Book prize lists

More important to light than to medium buyers

Advertising

**Table 2.9      Average rating scores for factors (1-10)**

	<b>Total</b>	<b>Light</b>	<b>Medium</b>
Familiar author	7.0	6.8	7.4
Recommendations by family/friends	6.6	6.6	6.6
Description of book on cover	6.6	6.2	7.4
Familiar series	6.5	6.2	7.0
Book being sold at a discount	6.3	6.3	6.2
Requests from other people	6.2	6.1	6.5
Price of book in general	6.1	6.0	6.2
Cover design	5.3	5.0	6.0
Book promotions in stores	5.0	4.1	7.0
Lists of best-selling titles	4.2	4.0	4.5
Book associated with film	4.1	4.1	4.2
Reviews in press/newspapers/magazines	4.0	3.6	4.8
Book associated with TV programme	3.8	3.7	3.9
Reviews on TV/radio	3.8	3.4	4.5
Book prize lists/winners	3.4	3.1	4.0
Advertising	3.4	3.6	2.9
Recommendations by booksellers	3.2	3.2	3.3
Book descriptions in catalogue	2.9	2.8	3.0
Recommendations by libraries/librarians	2.7	2.8	2.6
Special theme in library	2.6	2.6	2.6
Book associated with radio programme	2.6	2.5	2.7

**2.10      Trustworthiness of advice on books**

In the final omnibus stage interviewees were asked to say how trustworthy they considered sources of advice on books to buy, by broad genre.

By far and away the most trustworthy source was *recommendations of friends and relations*, with *library recommendations* in a strong second place.

Although quite frequently individual respondents did differentiate the trustworthiness of advice for fiction and non-fiction, there were no significant differences overall with the exception of *recommendations/endorsements from*

other authors or reviewers written on the books themselves, considered not trustworthy for **fiction** but fairly trustworthy for **non-fiction**.

### 2.11 Attitudes towards bookshops

Nearly three out of four of all adults (Table 2.11) said they felt comfortable going into bookshops and are not put off buying books, with 42% saying they were quite happy to ask for advice in a bookshop.

The remainder said they found bookshops daunting/off-putting/unsuited for them, with the proportion rising to one third among non-buyers, and falling to only 3% among heavy buyers.

**Table 2.11 Attitude towards bookshops**

	Weight of purchase				
	All	None	Light	Medium	Heavy
	%	%	%	%	%
Comfortable, not put me off	73	48	78	84	97
Happy to ask for advice	42	29	41	48	59
Daunting, can put me off going in	10	13	12	10	2
Off-putting as they do not make it easy to choose	8	12	9	8	1
Feel out of place, they are not designed for people like me	8	13	8	5	1
None of these	6	17	2	0	0
Negative comments	18	33	18	10	3

Base: all adults

## **3 Increasing book buying**

### **3.1 Introduction**

Ways in which people might be encouraged to start or increase their level of book buying were investigated in the depth interviews, groups and the final quantitative stage of the research, both by asking a general question and by putting forward particular ideas/initiatives<sup>13</sup>, and assessing reactions.

Within the groups, respondents discussed at some length whether or not they felt they were missing anything important by not buying any or more new books, and not surprisingly the instinctive answer to this was 'no'.

However, as the discussion developed, it became clear that while there were a number of people who might be defined as confirmed non- or light buyers<sup>14</sup>, who strongly resisted the idea of buying any or significant numbers of new books (in effect mainly on price/value grounds), quite a few saw circumstances in which they might buy some/more books. Among this (qualitative) sample the numbers appeared to split about half and half, with perhaps some bias towards women changing their buying status.

In almost all cases light buyers were more positive than non-buyers that changes to the book market might lead to increased purchasing.

### **3.2 Depth interviews**

The following strategies/initiatives were seen most positively:

- reading groups
- greater awareness/use of audiobooks
- earlier/simultaneous publishing of paperback edition
- more sources for purchase
- author events/book festivals
- simpler English

Other suggestions for promoting purchase included:

- reduce prices (all, hardbacks, children's)
- better organisation of 2nd-hand books, in bookshops (mainly from non-buyers)
- increase sources (eg at work) (mainly from non-buyers)
- make books more original as gifts eg personalised covers
- print on demand (mainly from non-buyers)
- postage-free delivery (light/medium buyers)
- sale or return/buy back of used books in retail outlets (light/medium buyers).

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<sup>13</sup> The original list was put together from the brainstorming sessions, and refined as the study progressed.

<sup>14</sup> Within their current lifestyle/life-stage, though most accepted that they might alter their behaviour if their financial/leisure activity/family circumstances changed significantly (eg more spare money, infirmity, retirement, new children, etc).

### 3.3 Group discussions

The group discussions revealed that in order to encourage the non- and light buyers to start buying/buy more they needed to have books available so that they could look at them and buy with the minimum of effort.

Since these respondents rarely, if ever, thought about going into a bookshop, and felt that supermarkets were not currently offering enough choice or the right ambiance for book buying, there was a tendency to suggest that books should be made available at other places, and in particular in less traditional outlets such as the workplace; video outlets; libraries; off-licences; cinemas; etc.

Some suggested that local (often small, independent) bookshops should be open for longer hours, competing with, for example, video hire shops.

Book range was a factor for some, with several – especially those in semi-rural areas – saying that they did not have immediate access to a ‘good bookshop’ or a good range of new books.

These respondents would like their book choice to be made as easy as possible, by having, for example:

- i clear, separate, advice points (as opposed to trying to get someone off the till): possibly roving staff clearly badged as advisers
- ii better advice on age ranges for children’s books
- iii better/clearer book categories
- iv best-seller lists for children’s books in different categories/age groups
- v ideas on *if you like..., you’ll like...*

Some people were definitely put off by the vast array of books confronting them on entering a bookshop, while others complained that too many sources concentrated overmuch on bestsellers.

Respondents were quite critical of many of the cover blurbs and descriptions, where was generally required was a description of the plot and style of the book rather than a literary recommendation. These criticisms were directed at fiction rather than non-fiction, where expert endorsement can be a positive point.

Many were sceptical about press reviews, feeling that authors tended to be nice to other authors. While bookshop reviews were rather better regarded, there was nevertheless some considerable suspicion that bookshops’ recommendations were heavily influenced by publisher inducements: libraries were more trusted in this regard.

Most of the non-buyers didn’t watch programmes such as The Big Read or Richard & Judy, which were therefore generally seen as less influential. Those who did watch them felt they were mainly for **suggesting titles to read** (and possibly buy) rather than inducing them to **increase** their levels of purchases.

Book prices did cause problems, and for some people they were undoubtedly barriers to purchase. There were a number of strands to this, some influenced by perceptions of the extent of discounting, especially among best-sellers.

People felt that:

- i books sold at discount implied that full-price books were expensive
- ii books at full price may be at discount elsewhere, with the impetus to buy perhaps then lost
- iii high hardback prices prevented buying, and the impetus to buy the paperback edition (published at a later date) may then be lost
- iv children's books were felt to be quite poor value for money in comparison to adult books
- v the value for money is questionable if a book is read only once
- vi prices printed on/in books make them less suitable as gifts.<sup>15</sup>

### 3.4 Omnibus

In the final omnibus stage of the project, respondents were asked to say which, if any, possible initiatives might encourage them to start buying or to increase the number of new books bought, whether for themselves or other people. They were also asked specifically which would encourage them to buy more books for themselves.

Easily the most popular initiatives were *widening the selection available at supermarkets, books being exchanged at any bookshop, having the paperback edition of a book earlier, and places to look up similar authors*, all of which were selected by approximately 40-50% of all adults.

Importantly, the two leading initiatives were of interest to significant numbers of non-buyers, even though many of those respondents felt that none of the initiatives would make them buy.

This suggests that not only would the leading initiatives bring more people into the market, they would also have an effect on existing customers, leading to a general increase in levels of book buying, even among the heavy buyers.

Nearly half of those non-buyers who had initially said they did not think they would be encouraged to buy any new books now indicated that at least one of the general initiatives presented to them in more detail (especially having a wider selection of books in supermarkets) might in fact bring them into the market after all.

Similarly, 70% of those medium and light buyers who previously thought they would not buy any more books now implied that at least one of the general initiatives might lead them to increase their purchases.

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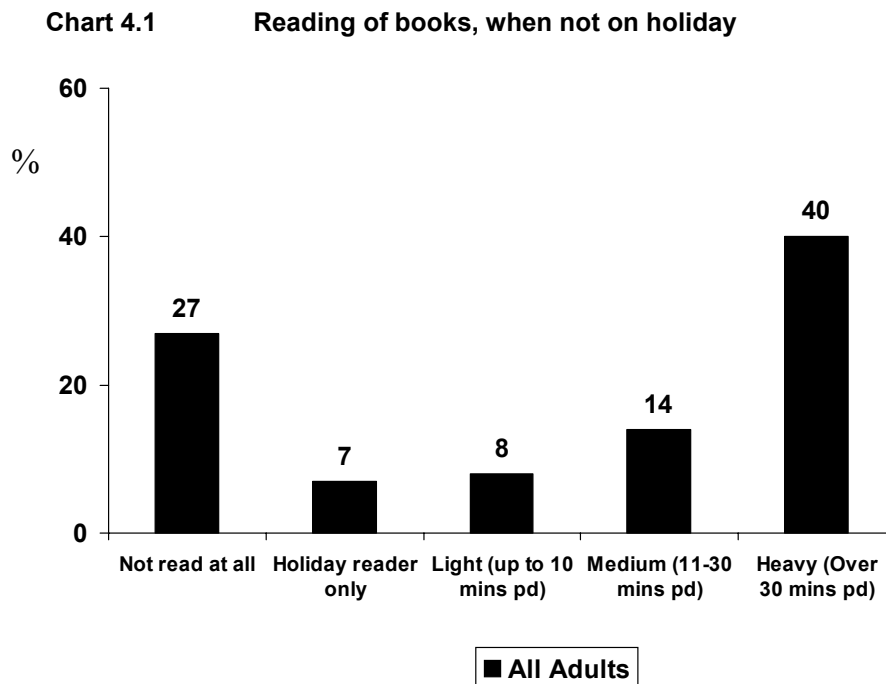
<sup>15</sup> Respondents want to know the rrp of the book, but want it easily removable for presents.

## 4 Book reading

### 4.1 The extent of reading overall

#### 4.1.1 Reading in general

The initial omnibus phase of the study provided an estimate of the time adults spent reading books<sup>16</sup>, and Chart 1 indicates the responses, showing that a third of adults claimed they don't usually read books at all (unless – for some – they were on holiday).



On average, respondents appeared to read for about 26 minutes a day and, as might be expected, women were both more likely to read at all and to read for longer each day than men (Table 5.1.1a). 38% of men were non-readers, compared to 31% of women.

Book reading was highest among those aged 55-64 (70%) and the retired (68%), those from the AB social grade (82%) and those either still in education (85%) or whose terminal education age was 19+ (79%).

<sup>16</sup> At this stage it was not specified whether reading should be for pleasure, education or work.

**Table 4.1.1 Reading while not on holiday, by demographics**

		<b>Non-reader</b>	<b>Light 1-10 min</b>	<b>Medium 11-30 m</b>	<b>Heavy 31+min</b>	<b>Ave number</b>
All	%	34	8	14	40	26
Male	%	38	9	15	36	24
Female	%	31	7	14	45	29
16-19	%	33	12	17	36	24
20-24	%	36	8	15	40	25
25-34	%	36	11	16	33	23
35-44	%	36	8	15	37	25
45-54	%	32	10	14	40	26
55-64	%	30	6	17	45	29
65+	%	33	5	10	49	31
AB	%	18	6	21	53	34
C1	%	29	10	18	44	28
C2	%	43	10	11	34	22
DE	%	43	7	10	35	23
Child in household	%	40	9	15	34	22
No child in household	%	31	6	14	43	29
<i>Terminal education age</i>						
Still studying	%	15	11	16	55	35
16 or under	%	42	7	13	35	23
17-18	%	30	10	17	41	27
19+	%	21	9	17	52	33
<i>Working status</i>						
Full Time	%	36	11	16	35	24
Part Time	%	37	9	12	40	25
Not working	%	33	7	16	41	27
Retired	%	32	5	12	47	31

NB Don't know not shown

Base: all adults

#### 4.1.2 Reading on holiday

The average time spent reading per day while on holiday (Table 4.1.2) was almost identical to the average time spent while not on holiday, both overall and for men and women separately, though 44% in total said they did not read books, either at all (27%) or while on holiday (17%).

Although fewer people (56%) read books while on holiday than did so at home (66%), a higher proportion of those who did read on holiday read for over an hour a day on average.

**Table 4.1.2 Average time spent reading per day while on holiday**

	<b>All</b>	<b>Men</b>	<b>Women</b>
	%	%	%
Do not read books at all	27	30	24
Do not read on holiday	17	16	17
<i>Do not read on holiday</i>	44	46	41
Up to 10 mins a day	4	5	3
11-20 mins a day	3	3	2
21-30 mins a day	5	6	4
31-60 mins a day	8	8	8
Over 60 mins a day	33	30	37
<b>Average</b>	<b>26</b>	<b>24</b>	<b>29</b>
Don't know (but do read)	4	3	5

Base: all adults

## 4.2 Reading history

### 4.2.1 Reading as a child or adult

From the depth interviews it appeared that around three out of four non-readers had enjoyed reading books at some time in their lives, mostly when they were children (claimed by a majority), though some claimed they had done so as adults (Table 4.2.1).

**Table 4.2.1 Whether enjoyed reading as a child or adult**

		<b>None</b>	<b>Light</b>	<b>Medium</b>
<i>Base:</i>		66	68	34
		%	%	%
<b>As a child</b>	Yes	67	81	67
	No	33	19	33
<b>As an adult</b>	Yes	38	not asked	
	No	62		
<b>Ever</b>	Child and adult	31		
	Child only	36		
	Adult only	7		
	<b>At all</b>	<b>74</b>		
	Never	26		

#### 4.2.2 Why stop reading for pleasure

Current non-readers who had read books for pleasure as adults were asked why they had stopped, and the reasons put forward were, in descending order of importance:

- i too busy, children, household
- ii too busy, work
- iii too busy, social
- iv just prefer other things
- v difficult to find books to read.

#### 4.2.3 Why start reading for pleasure

Light and medium readers who did not enjoy reading as a child had started reading for pleasure for a variety of reasons, the most important of which were:

- i when they started reading books to their children
- ii if a book was recommended strongly
- iii on a rainy/boring day on holiday
- iv reading the book of a film/TV programme
- v in hospital.

#### 4.2.4 Reading as an adult

Most light and medium readers said that their habits, in terms of amount read and times and occasions of reading, had altered. For most this was because they had changed the amount they read, but a quarter said they had changed the occasions.

The numbers saying they had increased or decreased the amount they read were almost identical, but there were significant variations between respondent groups:

- medium readers had mainly increased, while light readers had lessened the amount they read
- men were more likely than women to have increased their reading
- the proportions who said their reading had increased rose with age.

Those who had increased the amount they read said this was because they:

- i had more opportunity/time to read
- ii enjoyed reading more
- iii stopped doing other activities
- iv had greater access to books
- v not sure/just happened.

Those who said they were reading less gave answers that were the opposite to these, although no one said that they actually enjoyed reading less than they

used to. Again, most attributed the drop to lifestyle changes, though some put it down to reduced opportunities to get hold of books:

- i less opportunity/time to read
- ii started doing other activities
- iii reduced access to books.

### 4.3 General attitudes

#### 4.3.1 Attitudes towards reading books for pleasure: quantitative

Attitudes to reading were examined in a general way on the omnibus, and overall most people were fairly positive towards reading. Even among non-readers, less than a third were actually ill-disposed towards reading, as they tended to say they did not have time at the present and/or preferred doing other things, but many could foresee themselves reading at some stage in the future.

In general, people blamed lack of time and general circumstances for not reading (more), though many – especially light readers - also said that at present there were other things they preferred doing (Table 4.3.1).

**Table 4.3.1 Attitudes towards reading books for pleasure**

	Book reading				
	All	None	Light	Medium	Heavy
	%	%	%	%	%
Would like to do more, but cannot at present	34	18	50	49	32
I quite enjoy, and do as much as I want to	33	0	11	38	58
Foresee doing more in the future, when more time	31	20	27	35	39
Don't mind, but I prefer doing other things at present	21	32	46	17	4
Don't enjoy, and no foreseen change	6	29	0	0	0
None of these	3	5	3	1	2

Base: all adults

#### 4.3.2 Attitudes towards reading books for pleasure: qualitative

Within the depth interviews, light and medium readers were given a set of 5 statements to agree or disagree with, with variations in the statements depending upon whether the respondents only read on holiday or not (Table 4.3.2).

*a light/medium general readers*

There were great differences in attitude between light and medium readers, with reading clearly a more important activity to the latter, although a majority of both expected to read more as they became less active.

*b holiday readers*

Holiday readers had very mixed attitudes, with most expressing some enthusiasm, and most also expecting to read more if they became less active.

**Table 4.3.2 Agreement with attitudes to reading**

	<b>General</b>	
	<b>Light</b>	<b>Medium</b>
	<i>Base:</i>	
	35	34
	%	%
Reading books is something I do but I would expect to do more of it if I become less active generally	64	56
Reading books is something I do to wind down, rather than a hobby	57	35
I only read books if I have nothing better to do	29	6
I enjoy reading books, but there are other leisure activities that I enjoy just as much	21	29
I really enjoy reading books, it is a very important activity for me, and I read as much as I can	7	56

	<b>Holiday</b>
	<i>Base:</i>
	%
I enjoy reading books, but it is something I only have time to do on holiday	59
Although reading books is something I only do on holiday, but I would expect to do it at other times if I become less active generally	59
I only read books if I have nothing better to do while on holiday	35
I look forward to having the chance to read books when I am on holiday	35
I enjoy reading books, but there are other leisure activities that I prefer to do when not on holiday	35

Two thirds of light/medium readers sometimes felt that reading was a bit of a luxury, with light readers, women and those under 45 most likely to say that. They mainly felt that there were times when they read when they know they had other things they should be doing, or other things which would be 'less selfish'.

*I do find myself occasionally thinking that I should not just be sitting reading, but be getting on with some of the many household tasks that need doing.*

*There are times when I think I might have a sit down and read, but then I think I should do some more work, and that is then what I do.  
Reading is a bit of a selfish activity – not communicating with people when you are in their company – and is not perhaps what I ought to be doing at that time.*

#### 4.3.3 Benefits of book reading

Among all adults there was a high level of agreement when asked for opinions of each of five possible benefits of reading books for pleasure, apart from *I like talking about the book with other people*.

Not surprisingly, the more the person reads, the more they agreed with each statement. Overall, only one of these statements was deemed really relevant to non-readers, which was that *it is a good way of gaining new knowledge/perspectives*.

**Table 4.3.3 Perceived benefits of book reading (rating out of 5)<sup>17</sup>**

	Book reading				
	All Ave*	None Ave*	Light Ave*	Medium Ave*	Heavy Ave*
Good way of gaining new knowledge/perspectives	3.76	2.92	3.49	4.01	4.33
Enjoyable way of relaxing	3.59	2.13	3.36	4.06	4.50
Enjoyable form of escapism	3.40	1.99	3.42	3.81	4.21
Quality time for myself	3.27	1.79	3.00	3.67	4.24
I like talking about the book with other people	2.43	1.34	2.21	2.85	3.10
<i>Average rating</i>	<i>3.29</i>	<i>2.03</i>	<i>3.10</i>	<i>3.68</i>	<i>4.08</i>

\* Average rating based on scale: Agree strongly= 5, Tend to agree = 3, Tend to disagree =1 and Disagree strongly = 0

Base: all adults

#### 4.3.4 Qualitative

The depth interviews revealed that over half of the non-readers thought they might read books for pleasure at some time in the future<sup>18</sup>, while approximately 7 out of 10 light and medium readers thought they might increase the amount they read.

<sup>17</sup> We have used a scoring system to compare opinions overall, and as a rough rule of thumb, any score under 2 means disagreement, a score of 2 means moderate agreement, a score of over 3 is fair agreement, and 4 or more is quite strong agreement.

<sup>18</sup> This subject was covered in the depth interviews ahead of any discussion on possible changes/initiatives.

The most common reasons<sup>19</sup> for changing reading behaviour were:

- i when I stop working (so much)
- ii when the children are older
- iii when I am less active/mobile/etc.

but public libraries were also mentioned:

- improvement to local library
- move somewhere where there is a good library

#### 4.4 Reasons for not reading at all

##### 4.4.1 Overall reasons

Among non-readers, reading newspapers or magazines instead of books was the reason given by the greatest number for not reading books for pleasure, though significant numbers also felt they lacked the time, preferred to do something more relaxing - or just did not enjoy reading books (Table 4.4.1).

**Table 4.4.1 Reasons for not reading books for pleasure at all**

	<i>Base:</i>
	66
	%
I prefer to read newspapers or magazines	71
Do not have sufficient time to read	58
Prefer to do something more relaxing	53
Just do not enjoy reading books	48
Trouble finding books I want to read	28
Reading books is a bit of waste of time	14
Find reading a bit difficult	7
Trouble getting hold of books to borrow	3
Poor eyesight	3
I get all I want from the Internet	3
Trouble getting hold of books to buy	0

##### 4.4.2 Prefer newspapers/magazines

Preferring to read the press was cited equally by both men and women, who said this was because:

- i it was easy to read
- ii it could be picked up and put down, snippets, etc
- iii kept them up-to-date, informed
- iv of special interest.

<sup>19</sup> Respondents might well give more than one answer.

#### 4.4.3 Insufficient time

Women were somewhat more likely to say they had insufficient time to read than men, and it was more of an issue for those aged 25-44 and less for the 45-65 year olds.

Although many people said that they did not have sufficient time to read, when probed it was clear that what they meant was that there were other things they preferred to do with their spare time, and that to some extent they felt that reading was a bit of a luxury, and something they might get around to if they had nothing better to do or were less active generally.

Some respondents added that when they did have the time they might well be too tired to concentrate or just want to collapse and watch television or do something similarly uninvolved.

#### 4.4.4 Prefer more relaxing activities

Preferring activities they perceived as more relaxing was of similar importance to men and to women, but was less important as respondents got older.

Books were seen as less relaxing because – for some people – they required both brainwork and concentration *unless the books is so mindless as to be not worth reading*. What they wanted was something that allowed them almost to switch off: these people often took part in sports, or had young children, etc. As one respondent put it:

*It is as though I really want to be almost asleep while still remaining awake.*

#### 4.4.5 Don't enjoy reading books

Disliking reading was rather more significant for women than men, and for those under 25. However, most were unable to explain clearly why they did not enjoy reading books.

Typical comments were:

*I am not sure how I can say it any better for you. I do not find that I enjoy waiting for things to happen in a book. You sit there, and all the words you have to take in – it just isn't all that interesting.*

*I just do not enjoy doing it – I would always prefer doing something else. It doesn't interest me – I prefer so many other things.*

For some, books were too slow:

*It seems to take so long for things to happen. I much prefer a film or a play, where you get all the action and plot fairly quickly. With a book you always seem to have to wait for something to happen.*

*They just do not get on with it – when I want a story I want to get on with it.*

Some men did not enjoy reading fiction/stories, preferring non-fiction, where they might use other sources:

*I don't like fiction – if I was going to read it would be history or biography or something like that. But on the whole I prefer to read magazines, with lots of little bits of information.*

#### 4.4.6 Trouble finding books I want to read

Problems in finding suitable books was most likely to hinder those under 25, who found:

- i it difficult to assess books from covers and descriptions, and having made wrong choices, had decided not to bother
- ii books they felt capable of reading were really written for children, not adults.

These respondents tended also to say they preferred reading other things or doing other activities.

A few respondents said that too many of the books they had tried to read had proved beyond them and:

*I see no point in straining to read and get through a book when I am trying to relax and amuse myself.*

### 4.5 **Reasons for not reading more**

For the majority of light and medium readers who said they would like to read more, the principal reason for not doing so was a perceived lack of time (especially true of women and light readers).

However, it was clear that for most it was not so much a lack of opportunity, but, as with non-readers, more a preference for doing other things at times when they could be reading books for pleasure. Even those who said they were too busy looking after children or working, and too tired to read more when off-duty, admitted that they choose to do other things such as watch TV in preference to reading.

About one in ten of these respondents said that one problem was not having a quiet place to read:

*We only have the one room, and everyone is in there, and it is noisy with talking, TV, what have you. I sometimes escape to the bedroom, but that is pretty antisocial.*

*Nowhere quiet enough, a lot of the time. You need to be able to concentrate, and that is quite rare in this house.*

Respondents who maintained they suffered from a lack of time were asked whether they thought having short books, short chapters or short stories might help with this. Interestingly, over half said one or more of these might help, with short stories or short books provoking greater interest than short chapters.

Those who said short stories might help them overcome a time problem all had the same reasoning:

*If I only had a short time to read, a short story might be a good solution – I wouldn't be tempted to go on and on reading so much.*

A very similar attitude was expressed by those interested in short books, and short chapters were seen as a way of allowing readers to dip in and out of books at convenient places in the narrative, rather than having to stop halfway through a chapter.

## 4.6 Children's reading

### 4.6.1 Reading books to own children

Over four fifths of those who have had or have children say they do or did read to them. Those classifying themselves as non- and light readers were more likely to have children, so that it could be argued that children do restrict reading opportunities for some adults. Men were much less likely to have read to their children than were women.

**Table 4.6.1 Whether ever read/do read books to own children**

	None	Light	Medium
Base:	66	68	34
	%	%	%
Yes	62	68	44
No	15	13	11
No children	23	19	44

Base: all ever had children

### 4.6.2 Opinions of children reading books for pleasure

Respondents with children were asked about the importance of children reading books for pleasure (Table 4.6.2).

Nearly all felt it was very important or a good idea – with men being slightly less likely to say this than women.

**Table 4.6.2 Opinions of children reading books for pleasure**

	<b>None</b>	<b>Light</b>	<b>Medium</b>
<i>Base:</i>	<i>51</i>	<i>55</i>	<i>19</i>
	<b>%</b>	<b>%</b>	<b>%</b>
It is very important that my children enjoy reading books, as it will be of benefit to them in many ways	82	80	84
I think it is a good idea that my children enjoy reading books, but it is not really a major issue	10	20	16
I do not really mind whether my children enjoy reading books or not – the choice is theirs	4	0	0
There is plenty of time for my children to read books when they are older, and they should do what they like as children	4	0	0

Base: all with children now

## **4.7 Public libraries**

### **4.7.1 Non-readers and public libraries**

#### *4.7.1a Non-readers' use of public libraries*

Approximately 30% of non-readers in the depth interviews said they did occasionally visit a public library to look up information, use the Internet, for their children, and so on. Although base sizes are small, those under 25 were twice as likely to visit as were those aged 25 or over.

#### *4.7.1b Non-readers' barriers to using public libraries*

Two out of three non-readers said that they either didn't want/try to use a library, or that there were no barriers: the former was particularly mentioned by men and those aged 45-65 (Table 4.7.1).

Approximately a quarter of non-readers said they were put off by opening hours (days or times) – an issue mentioned by a third of those aged 25 or over, but only 4% of those under 25.

Other barriers were put forward by small numbers of non-readers, but no single issue was mentioned by more than 8% overall.

**Table 4.7.1 Barriers to library use for non-readers**

	Age			
	All	16-24	25-44	45-65
	Base:			
	66	23	23	20
	%	%	%	%
Not relevant/ don't try	35	36	28	46
No problems	31	36	17	46
Opening hours	14	4	22	15
Opening days	14	4	22	15
<i>Opening time at all</i>	24	9	39	25
Book selection	8	4	17	0
Distance from home	8	0	13	8
Length of borrowing	8	4	17	0
Access generally	6	4	9	5
Poor facilities generally	9	9	13	5
Number able to borrow	0	0	0	0

NB All but *poor facilities generally* were options put to the respondents.

#### 4.7.2 Light & medium readers and public libraries

##### 4.7.2a *Light and medium readers' use of public libraries*

Approximately half of these readers never borrowed books from a public library, with a higher proportion (59%) of medium readers than light readers (44%) ever borrowing. Men (37%) were much less likely than women (61%) to ever borrow books, while those under 25% were much less likely (31%) than those aged 25-65 (57%).

Most of the light reader borrowers who did borrow books did so less than 4 times a year: on average medium readers went once every 3-4 weeks.

One quarter of the 52 light/medium readers who did not borrow books from libraries said they did occasionally go for other reasons – anecdotally either with their children or for educational purposes (Internet, reference).

##### 4.7.2b *Light and medium readers' barriers to using public libraries*

Most (c60%) of these readers either did not try or had no barriers to using the library.

The barrier most commonly given by those light readers put off using a library was restricted opening hours (times, days). Medium readers had rather more barriers to (greater) use, involving opening times the book selection, and the distance they had to travel to get to the library.

**Table 4.7.2 Problems using library**

	<b>Light</b>	<b>Medium</b>
<i>Base:</i>	<i>68</i>	<i>34</i>
	<b>%</b>	<b>%</b>
Not relevant/ don't try	46	21
No problems	19	26
Opening hours	9	15
Opening days	4	3
<i>Opening time at all</i>	<i>13</i>	<i>15</i>
Book selection	4	18
Distance from home	4	15
Length of borrowing	6	6
Access generally	3	9
Poor facilities generally	4	6
Number able to borrow	1	9

NB All but *poor facilities generally* were options put to the respondents.

#### 4.7.3 Overall opinion of public library as book source

When asked to rate the public library as a source of books – using a scale from 1 (very poor) to 5 (very good) - most light and medium readers rated it at least 3 out of 5, with an average score of 3.7.

Women were more positive than men, and older respondents rated the public library more highly than the younger ones.

### 4.8 Value for money

#### 4.8.1 Rating of value for money

Overall in the depth interviews non- and light readers tended to think that hardback books represented not very good value for money, while paperbacks were seen as average to fair value (Table 4.8.1).

Medium readers had a rather more positive image of both hardbacks (average to fair) and of paperbacks (fairly good).

**Table 4.8.1 Perceptions of value for money**

	<b>None</b>	<b>Light</b>	<b>Medium</b>
<i>Base:</i>	68	70	34
	%	%	%
<b>Hardback books</b>			
Very good (+2)	5	6	0
Fairly good (+1)	12	16	56
Average (0)	19	13	0
Not very good (-1)	20	29	12
Very poor (-2)	17	19	12
Varies (0)	10	16	9
Don't know	19	0	12
<b>Mean score</b>	<b>-0.4</b>	<b>-0.4</b>	<b>0.2</b>
<b>Paperback books</b>			
Very good (+2)	9	16	33
Fairly good (+1)	31	57	56
Average (0)	22	13	11
Not very good (-1)	7	6	0
Very poor (-2)	3	0	0
Varies (0)	5	3	0
Don't know	23	4	0
<b>Mean score</b>	<b>+0.5</b>	<b>+0.9</b>	<b>+1.2</b>

#### 4.8.2 How value is judged

Judging value for money was – as among buyers – not really something respondents thought much about<sup>20</sup>. As a comparison, products such as music and videos were mentioned most often.

#### 4.8.3 Change in value over time

Those expressing an opinion tended to say that value for money had changed mainly for the worse in recent years.

Reasons for thinking it had worsened included:

- all prices rising (not books specifically)
- hardback prices higher
- nostalgia<sup>21</sup>

<sup>20</sup> See Section 3.8.2.

<sup>21</sup> by which is meant recalling the days when the actual/cover price of books was much lower, without having any regard to the effects of inflation on prices and incomes in general, or the relative prices of books to other items

Those who felt the value for money of books had improved cited:

- book prices not rising as quickly as other products in general
- increased discounting
- special offers coming into the market.

#### 4.9 Factors in book choice

A familiar author or series was generally the most important factor in respondents' choice of book to read, both rated at least 7 out of 10 by respondents overall, following by recommendations by family and friends, and the description of the book on the cover.

#### 4.10 Problems in finding books

##### 4.10.1 Problems in general

Approximately one in three light and medium readers in the depth interviews said they had some problems finding books they wanted to read (Table 4.10.1). In more than half of these cases respondents felt their reading was sometimes restricted, but while for medium readers it was more of an irritation, for light readers problems in finding books they wanted to read was a barrier.

The most common problem was having a poor selection, but difficulty in choosing, and the required book not being available, were also significant factors.

**Table 4.10.1 Whether have problems finding books wanted**

		<b>Light</b>	<b>Medium</b>
<i>Base:</i>		68	34
		%	%
<b>Problems</b>			
	Yes	29	33
	No	71	67
<b>Restrict read</b>			
	Yes	25	0
	No	4	33
<b>Problems</b>			
	Poor selection	15	0
	Difficult to choose	10	0
	Specific book not found	9	0

#### 4.10.2 Extent of selection

Around one in ten of these respondents suffered from having a poor selection of books available to them. In most cases this was dissatisfaction with their library service, but a few mentioned they didn't have a good bookshop within easy reach. A few said their library had a particularly poor selection of books of particular types such as westerns, biographies and poetry.

#### 4.10.3 Ease of selection

Some respondents (mostly men) said they sometimes had difficulty choosing a book to read, because:

*I need to be sure that I will want to read the book, and often it is difficult to judge from what the cover and description tell you.*

In fact, BML has established in previous studies<sup>23</sup> that in general men are less likely than women to take a chance on reading a book they might not like.

Many felt that too often books didn't have proper descriptions, but rather:

*Just say what a great book it is, how wonderfully written, and so on – but little about the plot, or what type of book it is.*

*You feel that the publisher has decided to get a group of the great and the good to say nice things, aimed at impressing people with what a great piece of literature a book is, but forgetting that people like me don't think about books that way.*

#### 4.10.4 Availability of specific titles

This was closely linked to having a poor selection generally:

*Of course, if they have a poor set of books anyway, they are unlikely to have just the one you are looking for.*

*I have sometimes asked the library to reserve a book for me, and get it from another library, but that takes ages, months even. In one case I paid my 75p, and it was a year before it arrived!*

### **4.11 Trustworthiness of advice on fiction books**

#### 4.11.1 Overall

By far and away the most trustworthy source for fiction was the *recommendations of friends and relations*, with *library recommendations* in a strong second place.

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<sup>23</sup> Eg Reading and Gender for the Orange Prize for Fiction, 1999

#### 4.11.2 Trustworthiness of advice, by book reading

In general, the more people read the more they trusted the various sources of advice on choice. The difference between non-readers and readers was most noticeable in terms of recommendations from friends/relations, where non-readers were less likely to be influenced – but even here this was still the most trustworthy source.

### 4.12 Reading on public transport

#### 4.12.1 General reading behaviour on public transport

Two out of three adults did not often travel by public transport, while one in seven said they used it often, usually reading books while doing so.

Non-readers were the least likely to travel by public transport, and from these data it would seem that usage of public transport encourages reading.

**Table 4.12.1 Reading books on public transport**

	All	None	Light	Med	Heavy
	%	%	%	%	%
Do not often travel by PT	67	77	72	60	61
Quite often use and read books for pleasure on PT	12	0	4	15	21
Quite often use but rarely read anything on PT	12	13	13	12	10
Quite often use, but only read press, not books	10	10	12	13	7

Base: All

#### 4.12.2 Why not read books on public transport

The 21% of adults who often used public transport but rarely, if ever, read books for pleasure while doing so were likely to be reading newspapers/magazines or sleeping or looking out of the window – while one in five had problems reading while travelling (Table 4.12.2).

**Table 4.12.2 Reasons for not reading books on public transport**

	All
	%
Prefer to read newspapers/magazines	35
Prefer sleeping/looking out of the window/etc	24
Don't like/can't read while travelling	21
Prefer to listen to radio/CD/etc	8
Prefer to work	2
Prefer to talk to other passengers	1
Other	8

Base: Use but do not read books on PT

## 5 Increasing book reading

### 5.1 Introduction

Ways in which people might be encouraged to start or increase their book reading were investigated during the research project, both by asking a general question and by putting forward particular ideas and initiatives, and assessing reactions to these.

### 5.2 Depth interviews

Overall, suggested strategies and initiatives (arising out of the brainstorming sessions) were mainly seen as being ways of suggesting books rather than encouraging people to start or increase reading.

An increase in loan sources and places from which to borrow books gained the most positive response.

### 5.3 Group discussions

During the group discussions, respondents were asked to suggest ways in which people might be encouraged to read (more). Many of their ideas iterate suggestions already discussed, though respondents felt it was important to find ways of attracting young adults to reading and generally to get people in the habit of reading:

- i **improve 'effortless' access to books:**
  - new retail outlets especially video hire shops
  - libraries<sup>24</sup> in high street bookshops
  - libraries in workplaces
  - while travelling
  
- ii **make reading more normal and socially acceptable**
  - role models seen to be promoting reading
  - reading featuring as an activity on soaps, etc
  - campaign to lessen 'guilt' feelings of wasting time reading, *because I'm worth it* style
  
- iii **emphasise reading's positives**
  - free entertainment
  - books long-lasting/great value (paperbacks especially)
  - portability – take and read anywhere
  - incredible choice – a book for everyone
  - a book for all moods
  - better than the film (TV, etc)
  - relaxation
  - imagination
  - all life is there

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<sup>24</sup> By which was meant some form of borrowing facility.

- iv **TV campaigns such as The Big Read/Richard & Judy**
  - similar to social acceptance
  - offering book recommendations not based on literary worth
  - keeping books in the forefront of minds
  - ‘Top of the Reads’ – equivalent to TOTP
- v **better tie-in promotions**
  - more emphasis on books on which TV/films based
  - books sold/hired packaged with videos/DVDs
- vi **improve bookshop/library displays/categories/advice**
  - more precise/segmented categories
  - more obvious and unbiased advice

## 5.4 Omnibus

At the final omnibus stage of the project respondents were asked to say how likely they would be to start reading or read more if they had either more convenient access to a choice of books to borrow and/or better information to help choose books. If the results of these are taken at face-value, it would seem that appropriate action in these two areas alone would have a positive effect throughout the market.

### 5.4.1 More convenient access to books to borrow

Overall, approximately 40% thought they would be at least fairly likely to read (more) with more convenient access (Table 5.4.1).

One in seven non-readers thought they might start reading if they had more convenient access to books, though it was the medium and heavy readers who were keenest on the idea.

**Table 5.4.1 How likely to read more with more convenient access to a choice of books to borrow**

	<b>All</b>	<b>None</b>	<b>Light</b>	<b>Med</b>	<b>Heavy</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
Very likely	14	3	7	13	25
Fairly likely	27	12	32	37	31
<i>Likely</i>	41	15	39	50	56
Not very likely	30	26	41	34	27
Not likely at all	24	50	18	12	14
<i>Unlikely</i>	54	76	59	46	41
Don't know	5	9	4	4	3
<b>Average likelihood*</b>	<b>1.91</b>	<b>0.85</b>	<b>1.75</b>	<b>2.19</b>	<b>2.55</b>

\* Based on scale of Very likely = 5, Fairly likely = 3, Not very likely = 1 and Not likely at all = 0

Base: All adults (2,000 sample)

#### 5.4.2 Better information to help choose books

Again, approximately 40% thought they would be at least fairly likely to start reading or read more if they had better information to help choose books (Table 5.4.1).

The more that a respondent read, the more likely they were to say they might increase their reading with more information about choice, with only 15% of non-readers implying this was likely compared to 57% of heavy readers.

**Table 5.4.2 How likely to read more with better information on choosing books**

	<b>All</b>	<b>None</b>	<b>Light</b>	<b>Med</b>	<b>Heavy</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
Very likely	10	3	3	9	18
Fairly likely	33	12	40	47	39
<i>Likely</i>	43	15	43	56	57
Not very likely	29	26	35	29	29
Not likely at all	23	50	18	12	11
<i>Unlikely</i>	52	76	53	41	40
Don't know	5	9	3	3	3
<b>Average likelihood*</b>	<b>1.87</b>	<b>0.85</b>	<b>1.79</b>	<b>2.20</b>	<b>2.43</b>

\* Based on scale of Very likely = 5, Fairly likely = 3, Not very likely = 1 and Not likely at all = 0

Base: All adults (2,000 sample)

#### **5.5 Reading groups**

Over half of the omnibus respondents claimed to be aware of but not really interested in joining reading groups, although 7% were interested in them and 1% were already members.