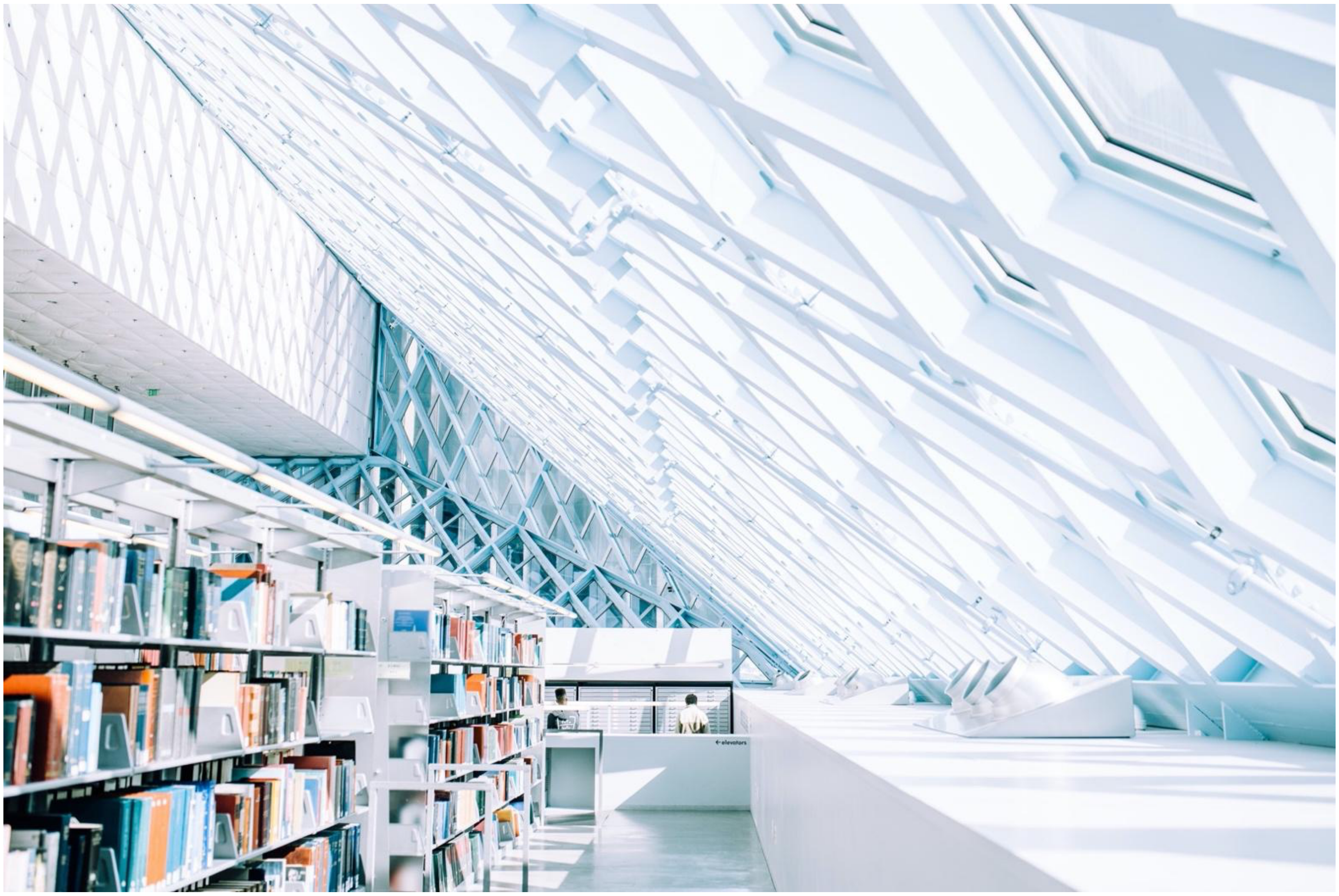

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Immersive Media and Books 2020

Consumer Behavior and Experience with Multiple Media Forms

REPORT AUTHORS

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NOTE: This is a consumer survey that was used to determine attitudes of media and books. The conclusions drawn are based on the survey data, which is only a sample of the population. This is not representative of the general U.S. population, but it is representative (within a 1.5% margin of error) of those in the U.S. who have engaged with a book in the last 12 months. See more details of the methods and limitations on page 7 and 8.

EXECUTIVE SUMMARY

BOOK DISCOVERY IN A CROSSMEDIA ENVIRONMENT

This is the first study to capture data about how people engage with books, video games and TV/movies. The study's main emphasis is on behavior with books, with demographic data in three age groups, five U.S. regions, and seven racial/ethnic groups.

Books exist in a connected media ecosystem where the most important customers are avid: avid book engagers (4+ books per month), but also avid consumers of other media. It is possible that these people are the ones who drove the 8.2% increase in book sales during 2020. This study finds that customers who engage avidly with books do so with other media, too. Cross-media discovery (discovering books through video games or TV/movies and vice versa) is highest with millennials. This suggests not a competition for scarce dollars and attention, but opportunities for cross-media collaboration.

Based on this study, avid book engagers are more ethnically diverse and younger than the general survey population. The demographics for the industry to watch are Black and Latinx, millennials, and men. They engage with more books than middle-class baby boomer women, except in the context of book gifting. In the general survey population, book buying stayed the same during COVID. However, we know that there was an 8.2% increase in book sales in 2020 (as reported by NPD). Therefore, one of the possible reasons is that avid book engagers (Black and Latinx millennials) drove the biggest book sales jump in a decade.

Consumers aren't just engaging with books for entertainment (83% engage for other reasons). While print engagement is still strong, it is not the only format to consider, especially given the growth of ebooks in 2020. Compared to the immersive reading experience of print books, most audiobook and ebook engagers are multitasking (70% for audiobooks, 61% for ebooks). There are also many ways that consumers engage with books: borrowing, subscribing, buying, and also pirating. Book pirates are also customers: 41% of book pirates not only buy books, but buy the same book in multiple formats.

Book discovery is context-agnostic and highly distributed. Even the largest category (recommendations from friends) accounts for just 1/5th of survey respondents. This indicates that there are many ways people discover books and thus there are many ways to reach potential book buyers, borrowers, and gifters. Word-of-mouth circulates rampantly, but there's not a dominant context. Consumers of all ages are unaware of how metadata shapes book discovery.

Libraries, bookstores, and online channels mutually reinforce each other, leading to engagement and sales in other channels. 75% of respondents have library cards, and of those, 54.7% (41.5% of general survey respondents) buy the book rather than wait when a book is unavailable from the library. More library card holders are buying books during COVID (in all formats) than the general survey population. Author events at libraries, browsing library shelves, and browsing online library catalogs, all lead to new book discovery.

BACKGROUND

2020: A TOUGH YEAR

2020 is characterized by staggering highs and lows for book publishers, librarians, authors and readers. Pandemic book buying drove the most print book buying in a decade, up 8.2% over 2019, despite consumers' irregular access to brick-and-mortar bookstores during lockdowns. Digital book lending in libraries has also increased, which shows a strong interest in books from the public despite the challenges of the pandemic. Good news about increased sales and library borrowing, however, is sobered by the depth and range of pandemic impacts to the book industry.

Publishers Weekly is compiling an ever-growing list of COVID-19 Cancellations, Closings, Policy Changes, and More. Many booksellers were laid off. Some stores shuttered during the pandemic may never reopen. Authors experienced delayed launches and converted public appearances to entirely virtual settings. Libraries, many physically closed, were accessible only via ebook, streaming circulation, and "touch-free" lending in library parking lots. "Essential" service big-box stores such as Walmart, Costco and Target reaped a lion's share of in-store book sales while bookstores remained mostly locked out of the sales surge reported by NPD. Yes: 2020 was a tough year.

The pandemic plays an outsized role in our daily lives and in book publishing industry developments, but it's just one piece of our reporting. We researchers deliberately gathered information about people's behaviors both *before* and *during* the pandemic. Over 2021 and beyond, the world will see whether new book engagement behaviors developed during the pandemic will persist beyond it. Our study is proposed to be longitudinal; as we gather survey data going forward, the robust snapshot in this report will be contextualized by new answers to deliberately repeated questions, shedding light on new directions and behaviors the publishing industry should watch.

A WORD ABOUT BOOK ENGAGEMENT

To capture the wide range of things people do with books, we researchers asked people how many books they **engaged** per month, rather than how many books they **read**. We wanted to capture:

- people who check out materials from the library but don't always read or watch them;
- people who give books as gifts but don't necessarily read much themselves or consider themselves readers;
- people who discover books via other media such as video games or films and TV;
- people who buy books but don't always read them;
- people who buy books for a purpose other than reading, such as collecting or displaying;
- people who use books for work, school, or hobbies.

To gather data only about "avid *readers*"—the industry's perceived most valuable customer—would render invisible the many ways people engage with books. Survey respondents could select more than one type of engagement with books, to capture the full range of behaviors. That's why *responses* data are sometimes called out separately from *respondents* data. While reading for entertainment is still the #1 reason people engage with books (82.9% of respondents), there are just as many people engaging with books for other reasons (83% of respondents engaging for self-improvement, work and school, or gifts). That leaves a wide swath of book engagement behaviors that the industry could probe. This study provides the data to do so.

FIRST OF ITS KIND: A CROSS-MEDIA APPROACH TO BOOK ENGAGEMENT

To our knowledge, Immersive Media & Books 2020 is the first study of its kind to gather book engagement data alongside TV, movie, and video game engagement. We designed the study to reveal cross-media consumption and engagement behaviors. One important finding: avid book engagers are equivalently active across other media. Rather than competing for customers, book and media professionals might think about how their product could benefit from cross-media discovery. This report's dive into books as one facet of the dynamic media ecosystem is motivated by a consumer-centered perspective. We now have data that reveals book engagement in dynamic relation to people's engagement with other forms of media. Peoples' decisions about whether to buy, borrow or lease entertainment products, and the forms of attention to devote to those products, is particularly compelling.

Multitasking is a common feature of modern book engagement: 61% of ebook readers and 70% of audiobook listeners said that they were multitasking when engaging with these book forms. This cross-media research project focuses on longform content: books, TV/movies, and video games, but not music or social media. Our data support broadening the notion of what constitutes "immersive" attention. "Immersion" does not mean only the deep, uninterrupted concentration we associate with reading printed books or playing video games. “Immersion” can also happen while multitasking. The data support a more nuanced view of how entertainment products and formats feed different types of attention.

KEY FINDINGS

- The strength in book buying was driven by avid (Black and Latinx millennials) book buyers
  - Demographics to watch: men, millennials and non-white people of all generations. They engage with more books than middle-class baby boomer women, except in the context of book gifting.
- In the general survey population, book buying amounts stayed the same during COVID. However, we know that there was an 8.2% increase in book sales in 2020 (as reported by NPD). Therefore, avid book engagers (4+ books per month) drove the biggest book sales jump in a decade.
- Across all formats, millennials engage with books more than either of their two older cohorts (Gen X and baby boomers)
- Customers who engage avidly with books do so with other media, too. Cross-media discovery is highest with millennials. This suggests not a competition for scarce dollars and attention, but opportunities for cross-media collaboration.
- Libraries, bookstores, and online channels mutually reinforce each other, leading to engagement and sales in other channels.
- Book discovery is context-agnostic, especially for millennials. The means that book discovery is highly distributed. Even the largest category (recommendations from friends) accounts for just 1/5th of survey respondents. This indicates that people are fragmented in the ways they discover books and that there are many ways to reach potential book buyers, borrowers, and gifters.
- Pirates[1] are also customers. 41% of book pirates not only buy books, but buy the same book in multiple formats. Some pirate a book when it’s unavailable at a library.

[1]By book pirates, these are respondents who said that they read and/or download books that typically cost money (not public domain) from a website where other readers have posted copies for free. To be clear, when we talk about book pirates, we mean individuals, not the large-scale action often attributed to the term (i.e., people who systematically produce or market large quantities of copyright-protected material without authorization).

METHODS

The project was conceived pre-pandemic by Panorama Project and researchers at Portland State University to track the role of books in the entertainment media ecosystem, and examine public libraries as agents of book discovery, consumption and purchase. The Immersive Media study supplies crucial behavioral information, with a confidence rate of 98.5% accuracy, about how book buying, borrowing, discovery and consumption existed before the pandemic, and shifted during and because of it.

4314 people were surveyed in between September 18, 2020 and November 15, 2020. To participate, survey respondents had to have "engaged" with at least one book in the previous twelve months. Book engagement was defined as "buying, borrowing, subscribing to, reading or gifting a printed book, an ebook, or audiobook in part or in whole." Survey respondents who had not engaged with a book in the previous twelve months did not advance beyond the first question of the survey. For a complete picture of the study methodology, see Appendix 1.

The survey was conducted through Qualtrics, an industry-standard survey software that gathers respondents according to parameters set by the survey designers. For more information on Qualtrics, see Appendix 2. The survey needed to be do-able in 15 minutes or less to encourage participation. Researchers designed the survey respondents to proportionally match demographics of the U.S. bookselling regions (West, Southwest, Midwest, Northeast, Southeast) and ages (millennials, Gen X, baby boomers). Researchers also replicated the seven racial/ethnic categories classified by the United States Census. For a deep dive into methods, see Appendix 1.

The researchers, Rachel Noorda, Ph.D. and Kathi Inman Berens, Ph.D. of Portland State University in Portland, Oregon, U.S.A., are internationally-recognized professors and scholars of book publishing. In collaboration with a research team of book industry professionals assembled by the Panorama Project, the researchers peer reviewed all survey questions with the research team to ensure accurate and comprehensive representation of libraries, publishers, authors, readers.

LIMITATIONS

There are two primary limitations to the data analyzed in this study. 1) Consumer awareness of industry terms-of-art; 2) the limits of the survey method.

This study does not capture survey data about certain kinds of book discovery because consumers aren't aware of industry-specific terms-of-art. For example, most people don't understand the difference between *frontlist* and *backlist* titles, or *midlist* and *bestsellers*. Self-published books, which are the majority of ISBNs [international standard book number, each book's unique identifier] sold in the U.S., may or may not be recognizable as self-published to ordinary people. In some contexts, such books are clearly self-published; in others, they are not. As researchers, we could not rely on the survey population universally distinguishing self-published books from non-self-published books.

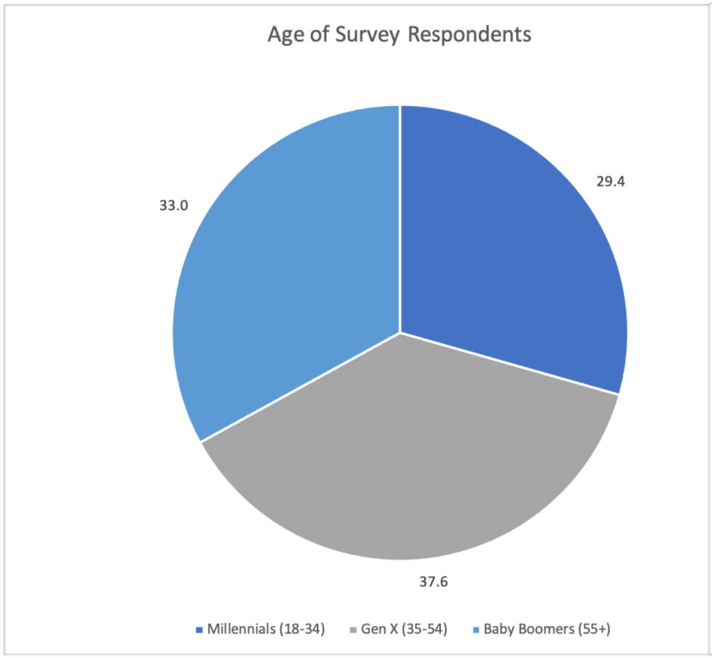
Survey methods have advantages, but also limitations. One of the limitations is that consumer behavior survey data relies on self reporting, and there is always the possibility that respondents do not tell the truth or misremember. We, the researchers, in collaboration with the research committee, have minimized this risk in two main ways: 1) framing questions so that consumers don't have to give exact numbers, which can be difficult for respondents to remember and 2) working (in collaboration with Qualtrics) to scrub the data for screening bad responses. See Appendix 1 for more information on this.

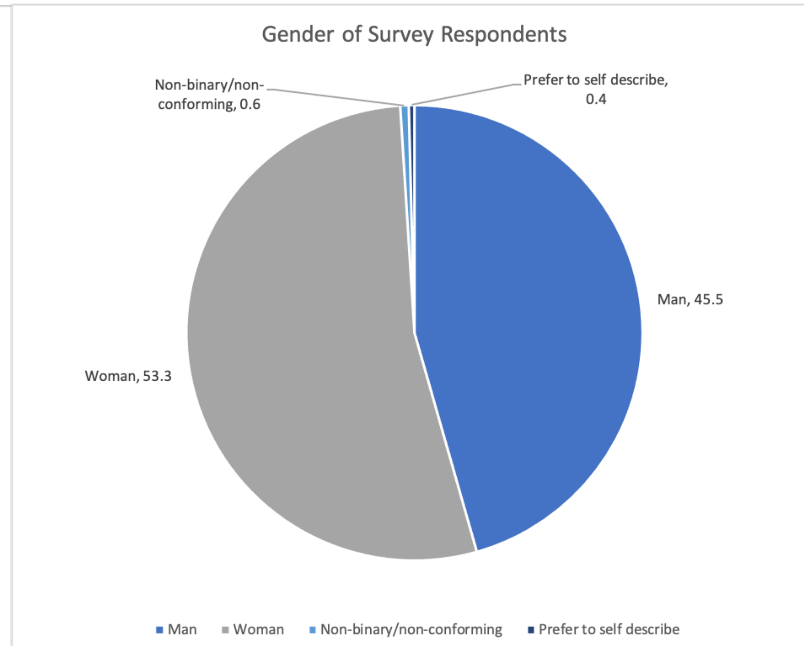
Another limitation of the survey method is duration because 12-15 minutes is considered by Qualtrics to be the maximum amount of time a survey can take before participation and completion significantly decrease. Research has found that the longer an online survey, the less likely respondents are to start and finish the survey (Galesic and Bosnjak 2009). The higher cost of administering a survey that takes longer than 15 minutes to complete is another constraint. Constraint of time and survey space limits the number of questions the researchers can ask.

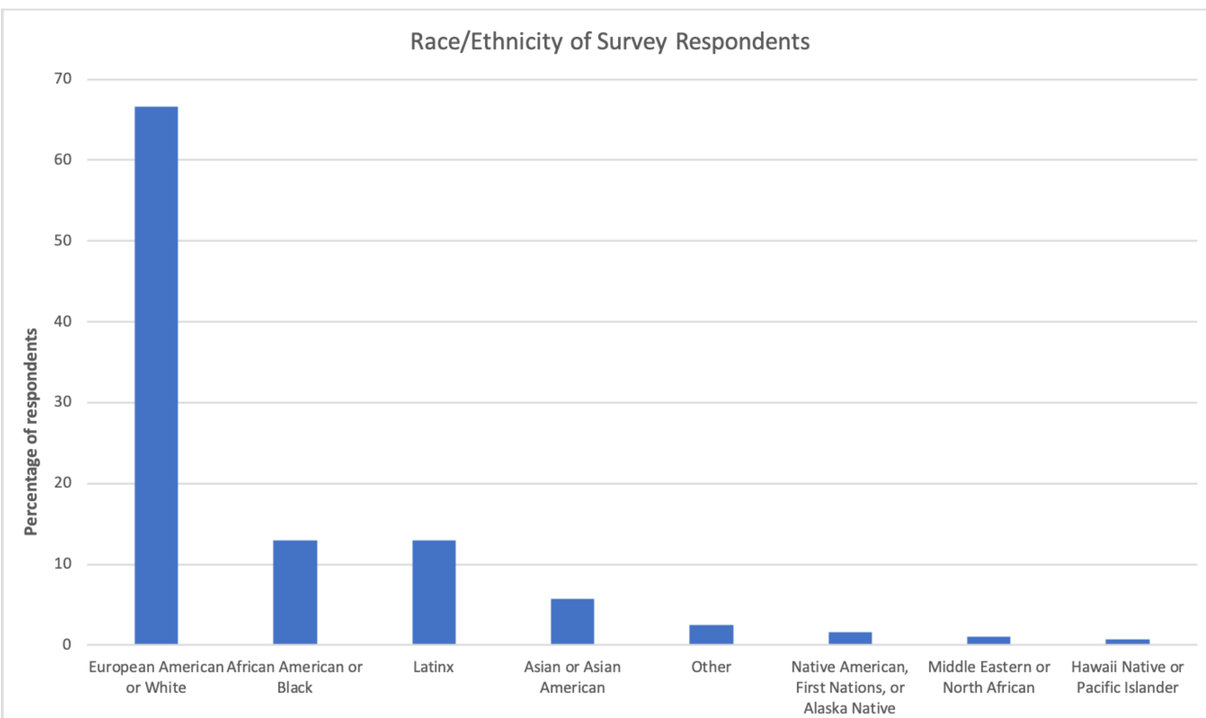
GENERAL SURVEY POPULATION

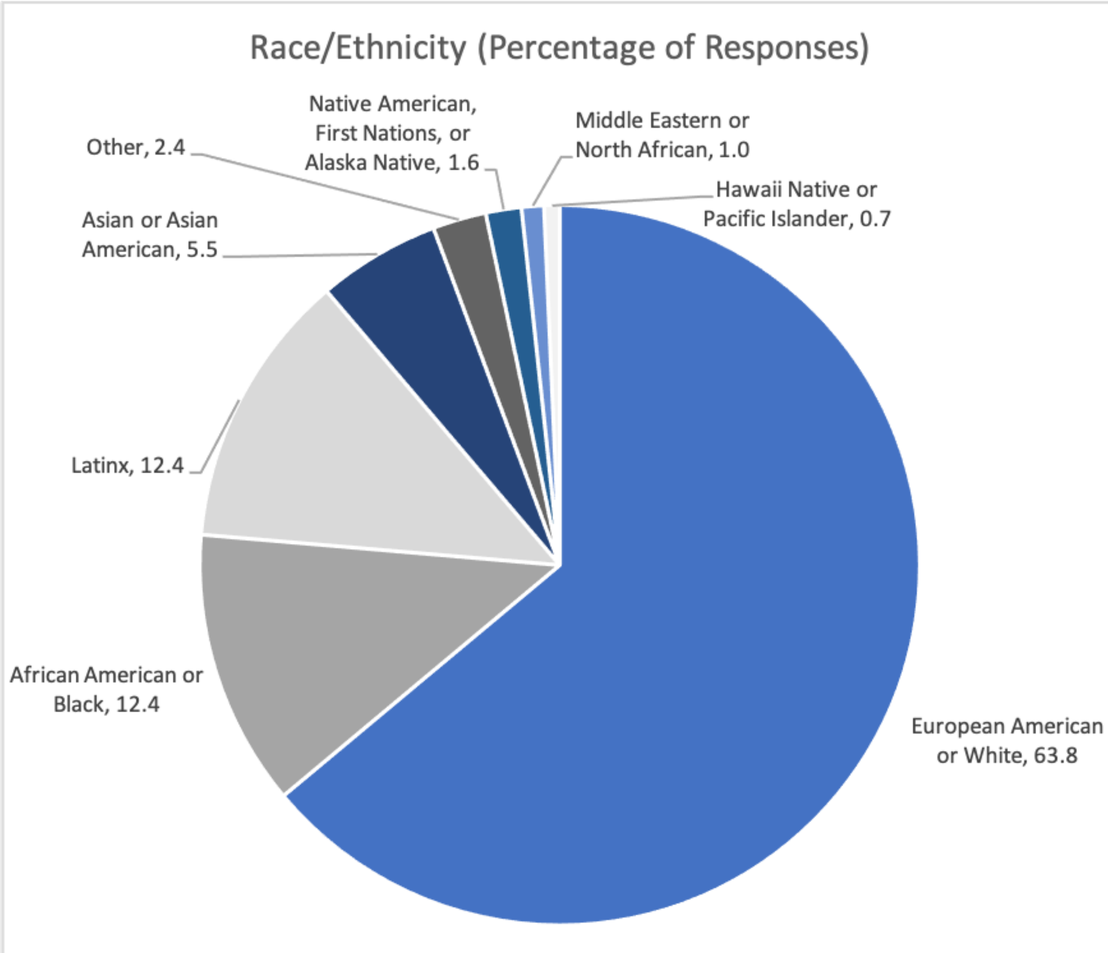
- In alignment with the U.S. population overall, the largest age category of survey respondents was GenXers (age 35-54), followed by baby boomers (55+), then millennials (18-34). There were approximately 7% more women respondents than men, and very small (under 1%) proportions of non-binary/gender non-conforming respondents.

- Again, aligned with U.S. demographics, European American or White was the largest racial/ethnic category of respondents (66.6%), followed by African American or Black (13%) and Latino, Latina, or Latinx (12.9%), then Asian or Asian American (5.7%). According to U.S. census data, younger generations are more racially diverse than baby boomers (see "Millennials" category below).

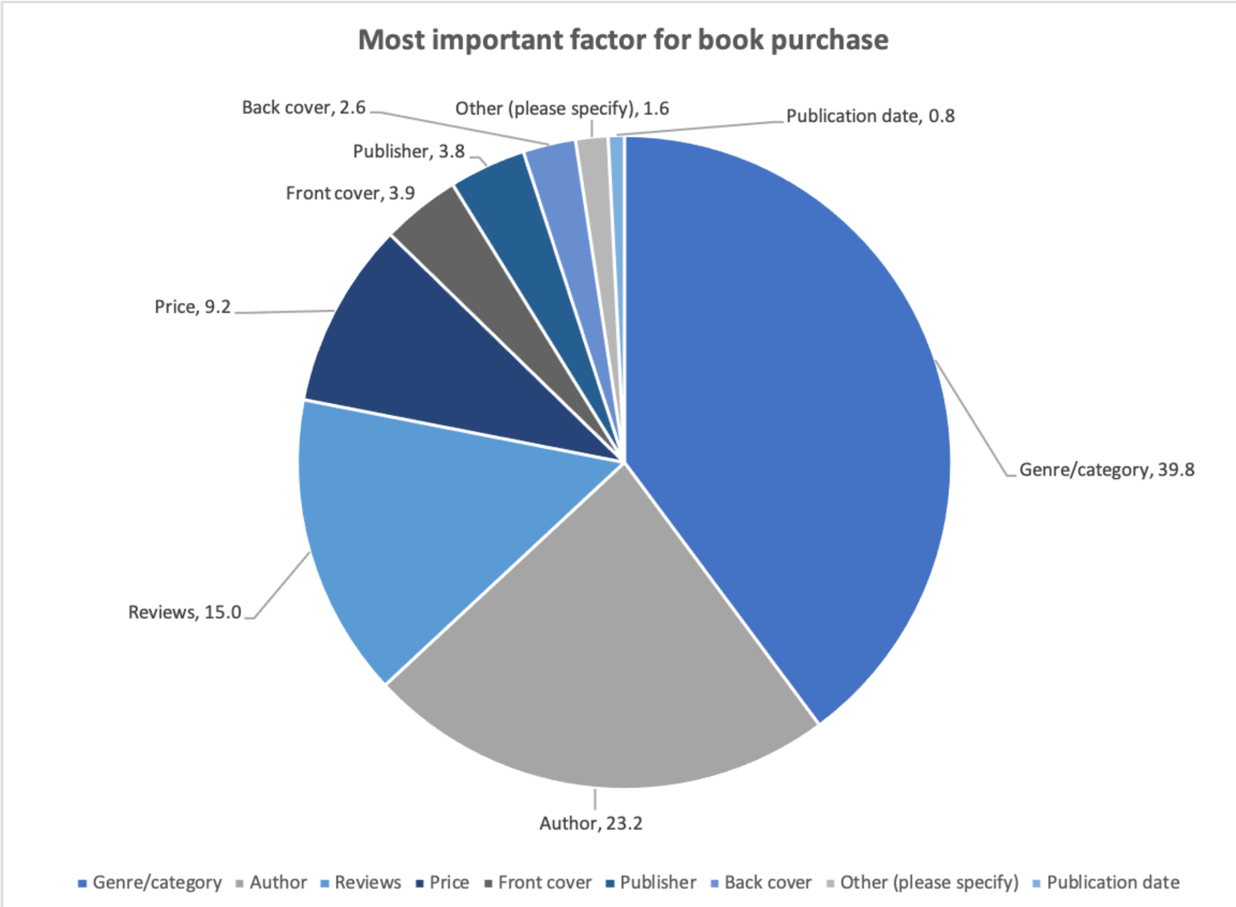


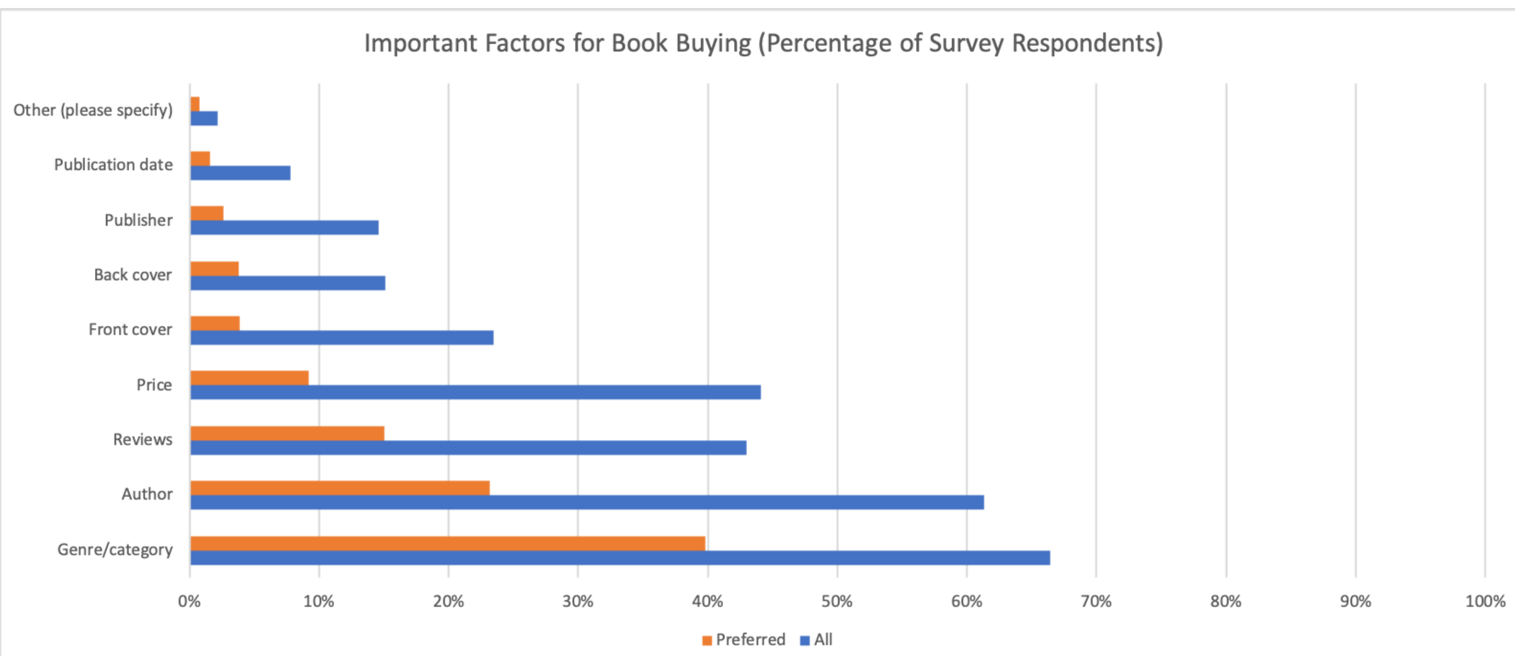




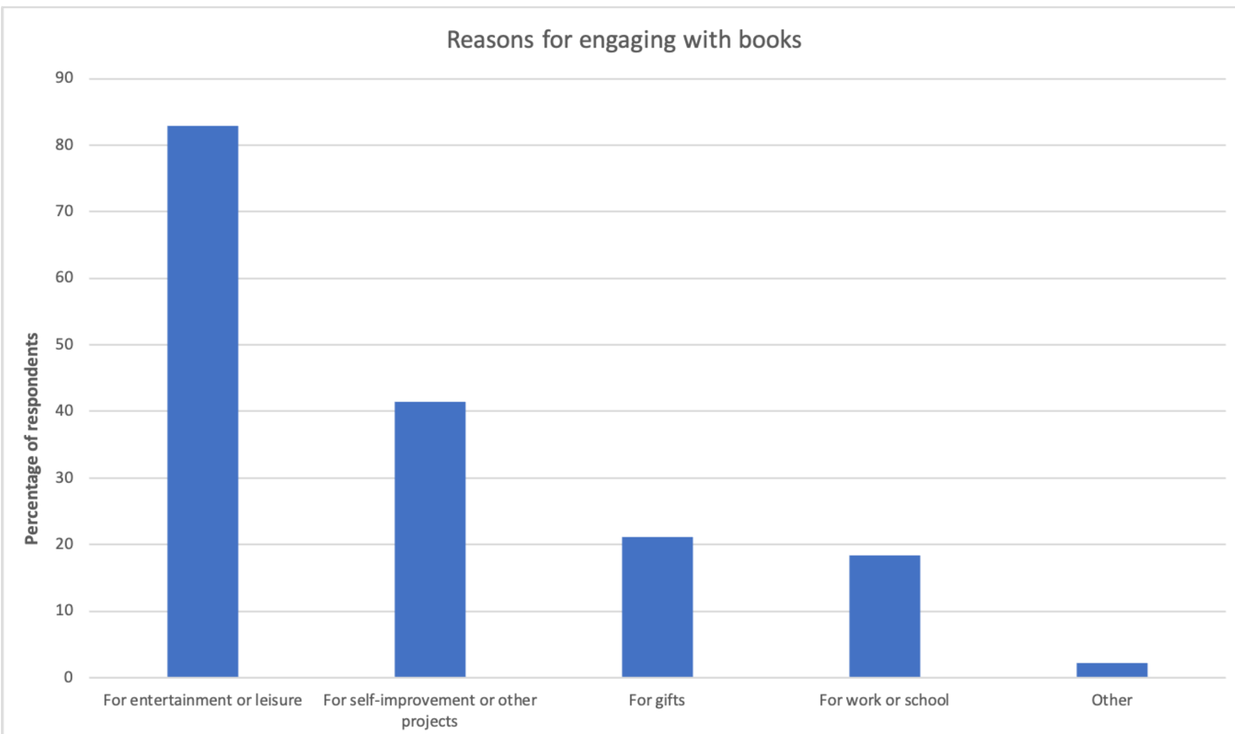


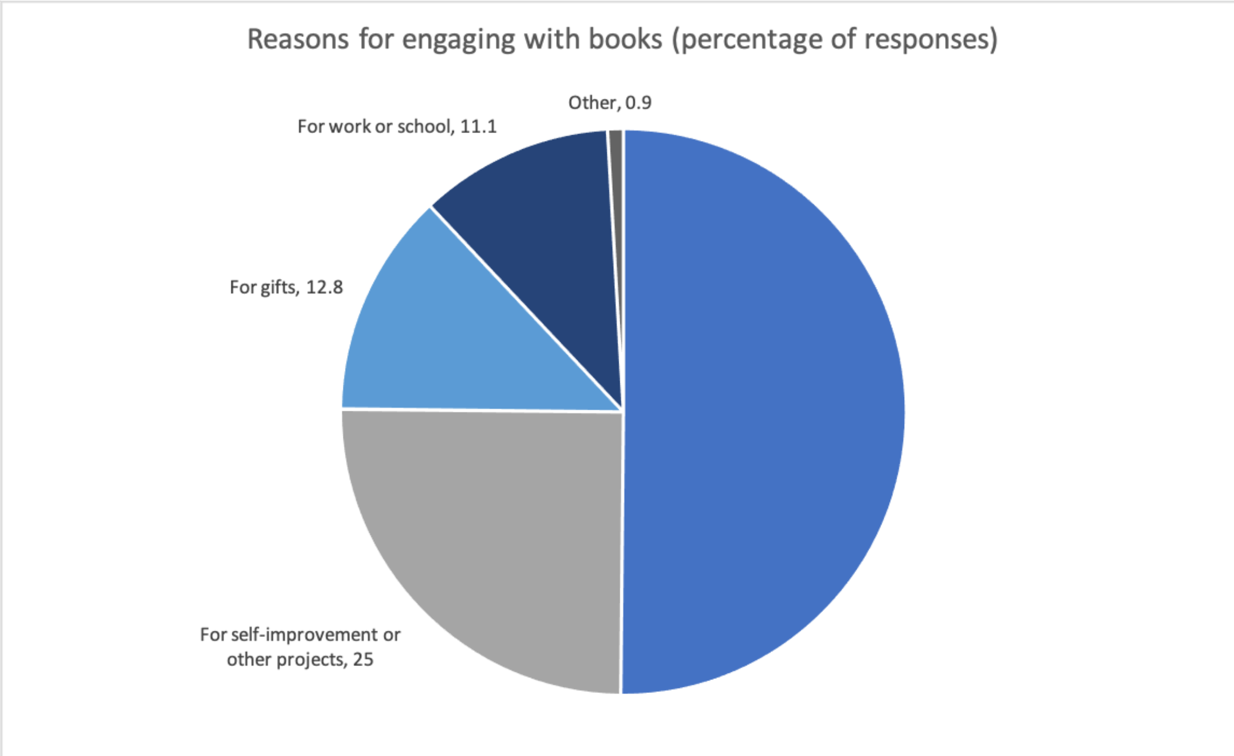
- The most important factors for book purchase are genre/category (39.8%), author (23.2%), and reviews (43% of respondents or 15% of responses). Price is much lower on the list than might be anticipated: only 9% of respondents said that price was the most important factor for book purchase.


Most important factor for book purchase
Back cover, 2.6
Other (please specify), 1.6
Publication date, 0.8
Publisher, 3.8
Front cover, 3.9
Price, 9.2
Genre/category, 39.8
Reviews, 15.0
Author, 23.2
Genre/category
Author
Reviews
Price
Front cover
Publisher
Back cover
Other (please specify)
Publication date


Important Factors for Book Buying (Percentage of Survey Respondents)
Other (please specify)
Publication date
Publisher
Back cover
Front cover
Price
Reviews
Author
Genre/category
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Preferred
All

- Entertainment is the main reason that respondents engage with books (82.9% of respondents or 50.1% of responses), followed by self-improvement or other projects (41.4% of respondents or 25% of responses), for gifts (21.2% of respondents or 12.8% of responses) and for work or school (18.4% of respondents or 11.1% of responses). Again, survey respondents could select more than one type of engagement with books, to capture the full range of behaviors. That's why *responses* data are called out separately from *respondents* data. These various reasons for engagement motivate the types of genres engaged with, discovery methods and places for finding new books, and preferred format. For example, book gifters engage in higher percentages with print books. Younger adult book engagers (millennials) also have higher percentages of engagement with books for work or school because these reasons align with their life circumstances.





- Because all survey respondents answered “yes” to the screening question that they engaged with at least one book in the last 12 months, survey respondents engage with more books on average than the U.S. population overall on average.
    - Average ebooks engaged per month: 2.4
    - Average print books engaged per month: 3.8
    - Average audiobook engaged per month: 1.8
- Media engagement during the pandemic largely remained the same for the general survey population. Over half of respondents said that their engagement of books, games, or newspapers/magazines stayed the same during COVID-19. TV/movies was the only media category where engagement that stayed the same was less than 50% (44.9%)
    - Engagement with books stayed the same: 51.8%
    - Engagement with games stayed the same: 53.6%
    - Engagement with newspapers/magazines stayed the same: 58.4%
- Subscriptions during the pandemic largely remained the same for the general survey population. Over half of respondents said that their subscriptions stayed the same across books, TV/movies, games, and newspapers/magazines.
    - Books: 62.3%
    - TV/movies: 52.6%
    - Games: 60.5%
    - Newspapers/magazines: 62.3%

- Approximately one-third of respondents are posting reviews or recommendations to websites/social media about books, TV/movies, or games. Surprisingly, however, only about one-tenth of them are discovering books, TV/movies, or games through such recommendations on social media.
    - 39.8% post book reviews or recommendations to websites/social media
        - But only 7.32% discovered books through recommendations on social media
    - 35.93% post TV/movie reviews or recommendations to websites/social media
        - But only 9.35% discovered TV show/movies through recommendations on social media
    - 28.81% post game reviews or recommendations to websites/social media
        - But only 13.35% discovered games through recommendations on social media

- The top three ways that people discover books are through recommendations from friends (20.8%), favorite author (15.3%), and recommendations from family (12.1%).

- The top three places where people discover books are browsing online bookstores (30.7%), browsing brick-and-mortar bookstores (17.4%), and in-person author events (13.3%).

SURVEY POPULATION INSIGHTS

N=4314 respondents.

All the survey participants in the Immersive Media study answered “yes” to the screening question: *have you engaged with at least one book in the last 12 months?* According to 2019 research from Pew, 75% of Americans have read a book in the last year; twelve is the average number of books those people read in a year. This Immersive Media study analyzes the behavior of at least that 75% of the U.S. population. Because the activities of book “engagement” is broader than book “reading,” the survey data likely represent the behavior of more than 75% of the U.S. population. The incident rate for the overall study was 61.8% and 2671 responses were screened out.

Quotas for age, race, gender, and region were enforced in the sample during collection to ensure that the survey was representative of and aligned with the U.S. population. The respondents were recruited through Qualtrics, and quotas were pushed starting with the harder-to-reach target groups, starting with non-white respondents, male respondents, and age quotas that were not filling as quickly.

The Immersive Media survey gathers and analyzes the self-reported media engagement behavior of:

- Three age groups: millennials (18-34), GenXers (35-54), and baby boomers (55+);
  - *Generational categories are somewhat arbitrary but are useful for description and sense-making about consumer behavior. PEW research defines millennials (in 2020) as 24-39 years, GenXers as 40-55 years, and baby boomers as 56-74 years. However, GenXers and millennials have no agreed-upon birthdate/age range, even from the U.S. Census Bureau. Therefore, our age ranges differ slightly from PEW for these three groups in order to align with the three representative age quotas that were implemented in the survey.*
- Seven ethnic subgroups: African-American or Black; Asian or Asian American; European or White; Hawaii Native or Pacific Islander; Latino, Latina or Latinx; Middle Eastern or North African; Native American or Indigenous;
- Five U.S. regions: Midwest, Southwest, West, Northeast, Southeast.

To contextualize this data of demographic data for Immersive Media survey respondents, here are some brief highlights of U.S. demographics to keep in mind:

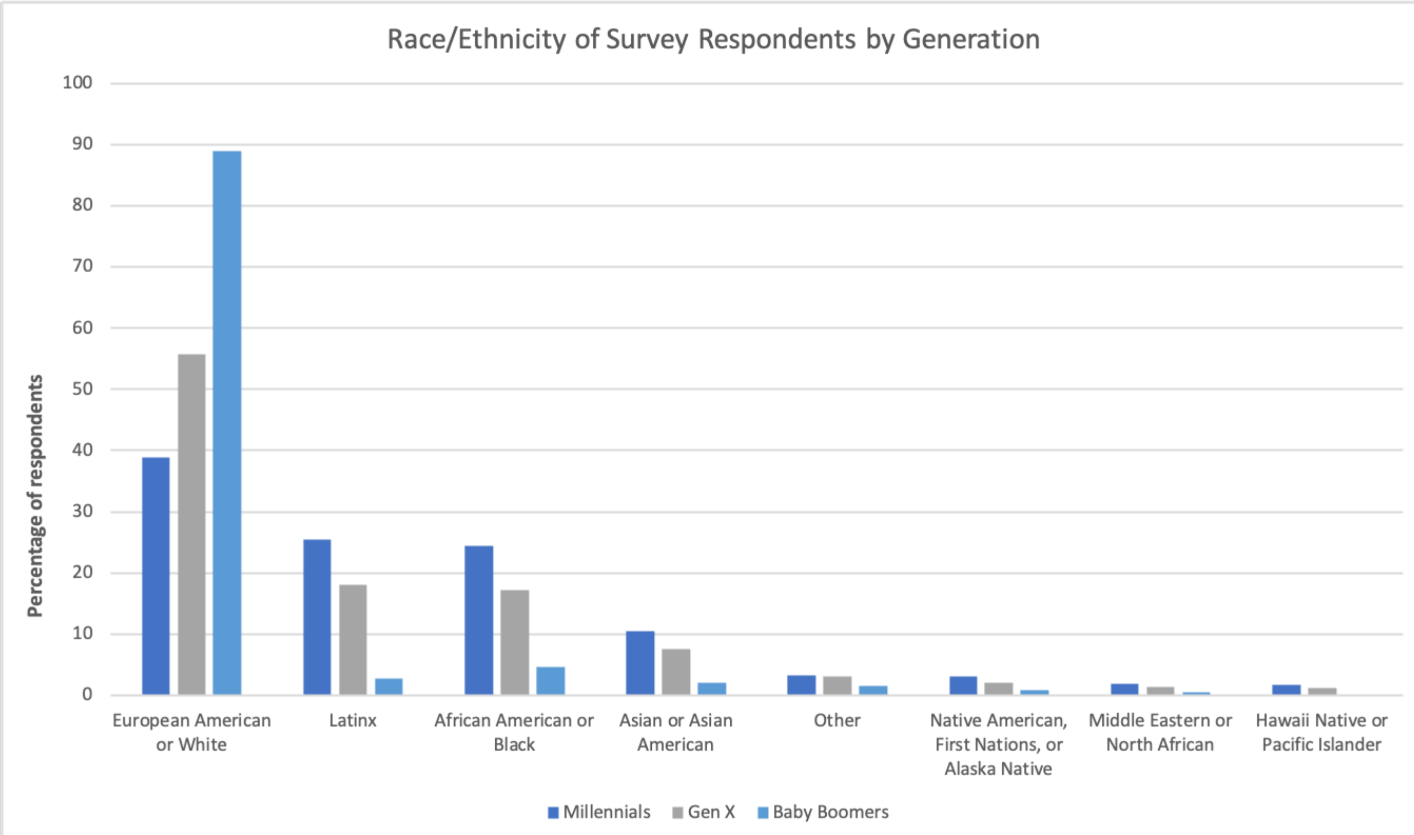
- In the U.S., the most common age for whites (58) is much older than for minorities
- The gender breakdown for the U.S. is approximately 50.8% female, 49.2% male
- The U.S. race demographics breakdown looks like this:
  - White: 76.3%
  - Black or African American: 13.4%
  - American Indian and Alaska Native: 1.3%
  - Asian: 5.9%
  - Native Hawaiian and Other Pacific Islander: 0.2%
  - Hispanic or Latino: 18.5%
  - Two or More Races: 2.8%

MILLENNIALS (18-34)

- Millennials are the most avid book engagers, engaging with the most books per month of the three age groups.
    - Ebooks: 3.1 (compared to 2.4 in the general survey population)
    - Audiobooks: 3.1 (compare to 1.8 in the general survey population)
    - Print books: 5.3 (compared to 3.8 in the general survey population)

- Millennials are significantly more ethnically diverse than the other age groups:
  - 38.9% European American or White (compared to 66.6% in the general survey population)
  - 25.4% Latinx: (compared to 12.9% in the general survey population)
  - 24.4% African American or Black (compared to 13% in the general survey population)
  - 10.4% Asian or Asian American: (compared to 5.7% in the general survey population)
  - 3.1% Native American: (compared to 1.7% in the general survey population)
  - 1.7% Hawaii Native or Pacific Islander: (compared to 0.7% in the general survey population)
- Millennials are the age population most likely to multitask while engaging media.
  - Print: 53.1% (compared to 37.1% in the general survey population)
  - Ebooks: 65.3% (compared to 60.7% in the general survey population)
  - Audiobook: 72.5% (compared to 70% in the general survey population)
  - TV/movies: 57.7% (compared to 48.5% in the general survey population)
  - Games: 42.9% (compared to 34.96% in the general survey population)
- Millennials are less likely to own a library card than the general survey population: 70.5% compared to 75.8%.
- But millennials also have a greater percentage of respondents who are borrowing more books from the library during COVID than the general population of library card holders.
  - Ebooks: 28% compared to 21.8% of library card holders
  - Audiobooks: 27.2% compared to 18.7% of library card holders

- Print: 29.1% compared to 23.9% of library card holders



A NOTE ON GEN Z (18-23)

In gathering the survey data for the Immersive Media & Books 2020 project, three quotas for age were implemented to make sure that representation matched the U.S. demographics. Of the survey respondents, 11.6% of them are between 18-23, falling into the generational category of Gen Z. It's estimated that Gen Z represents 20% of the overall U.S. population and that this group traditionally includes anyone born between 1997 and 2012, between 8 years old and 23 years old during 2020. Due to ethical limits in gathering data from respondents under 18 years old, data for the Immersive Media & Books 2020 survey only included respondents who were 18 and older. Therefore, this data on respondents age 18 to 23 is only a small portion of the age range for Gen Z and will be represented in this report primarily as a piece of the millennial category.

However, there are a few points we would like to note about how Gen Z does differ from the millennial (18-34) group:

- Gen Z had increase for "work and school" as a reason they engage with books
  - Gen Z: 38.6%
  - Millennials: 30.5%
  - Overall: 18.4%
- How Gen Z find books:
  - Increase for recommendations from influencers: 6% (compared to 4.3% for millennials and 2.9% for overall survey population)
  - Decrease for bestseller lists: 3% (compared to 5.2% for millennials and 5.8% for overall survey population)
  - Decrease for reviews/book lists on book-related websites (Amazon, Audible, B&N, Goodreads, etc.): 4.2% (compared to 5.3% for millennials and 6.2% for overall survey population)
- Where Gen Z find books:
  - Increase for in-person author events: 24.5% (compared to 20.2% for millennials and 13.3% for overall survey population)
  - Increase for virtual author events: 9.2% (compared to 8.2% for millennials and 5% for overall survey population)
  - Decrease for browsing shelves in brick-and-mortar bookstores: 11.2% (compared to 14.3% for millennials and 17.4% for overall survey population)
- Most important factors for Gen Z book buying:
  - Increase in genre/category: 41.2% (compared to 36.5% for millennials and 39.8% for overall survey population)
  - Increase in front cover: 9.4% (compared to 7.8% for millennials and 3.9% for overall survey population)
  - Decrease for author: 11.8% (compared to 16.3% for millennials and 23.2% for overall survey population)
- Gen Z had increases in subscribing to TV/movies and games, but decreases in subscribing to books and newspapers/magazines during COVID

- Although Gen Z had approximately the same percentage of respondents engaging in piracy as millennials, Gen Z had a higher percentage of respondents turning to piracy when a book was unavailable from the library
    - Gen Z (for library card holders): 20.5%
    - Millennials (for library card holders): 17.8%

GEN-X (35-54)

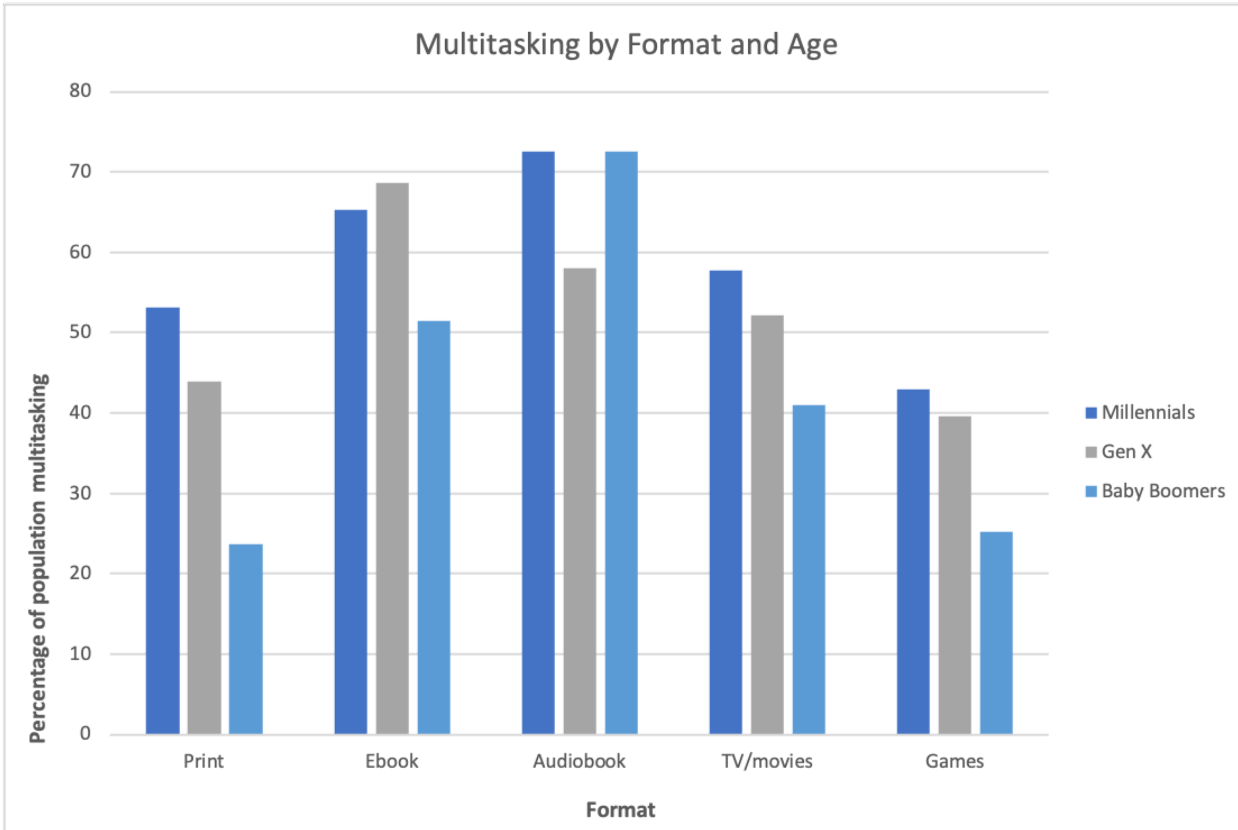
- GenX engage with more audiobooks and ebooks than the other age groups, but less print books than in the general survey population. Average books per month:
    - Ebooks: 2.7 (compared to 2.4 in the general survey population)
    - Audiobooks: 2 (compare to 1.8 in the general survey population)
    - Print books: 3.4 (compared to 3.8 in the general survey population)
- Increase in multitasking for every category except audiobooks.
    - Print: 43.9% (compared to 37.1% in the general survey population)
    - Ebooks: 68.7% (compared to 60.7% in the general survey population)
    - Audiobook: 58% (compared to 70% in the general survey population)
    - TV/movies: 52.2% (compared to 48.5% in the general survey population)
    - Games: 39.6% (compared to 34.9% in the general survey population)
- Decrease in book buying and all subscription services during COVID (books, magazines/newspapers, games, TV/movies) compared to the general survey population.
- Gen X have a greater percentage of respondents borrowing more books from the library during COVID than the general survey population.
    - Ebooks: 27.2% compared to 21.8% of library card holders in the general survey population
    - Audiobooks: 25.4% compared to 18.7% of library card holders in the general survey population

    - Print: 28.8% compared to 23.9% of library card holders in the general survey population

BABY BOOMERS (55+)

- Engage with the lowest average number of books per month.
    - Ebooks: 1.4 (compared to 2.4 in the general survey population)
    - Audiobooks: 0.5 (compare to 1.8 in the general survey population)
    - Print books: 2.9 (compared to 3.8 in the general survey population)
- During COVID, baby boomers had an increase in TV/movies engagement (10.4% compared to 8.5% in the general survey population) but decrease for books (2% compared to 3.5%).
- Baby boomers had the lowest cross-media discovery.
    - Books that led to discovery of TV/movies or games: 41.2% (compared to 60.3% in the general survey population)
    - TV/movies that led to discovery of books or games: 40.9% (compared to 61.2% in the general survey population)
    - Games that led to discovery of books or TV/movies: 9.4% (compared to 33.1% in the general survey population)
- Baby boomers are multitasking the least of any age group. However, baby boomers multitasked more with audiobooks than the general survey population.
    - Print: 23.7% (compared to 37.1% in the general survey population)
    - Ebooks: 51.5% (compared to 60.7% in the general survey population)
    - Audiobook: 72.5% (compared to 70% in the general survey population)
    - TV/movies: 41% (compared to 48.5% in the general survey population)
    - Games: 25.2% (compared to 34.9% in the general survey population)

- Baby boomers were the only age category where book purchases and subscriptions (across all four categories) during COVID didn't change; their habits stayed the same.
  - 74.8% said book subscriptions stayed the same during COVID-19 (compared to 62.3% of general survey population)
  - 65.2% said TV/movie subscriptions stayed the same during COVID-19 (compared to 52.6% of general survey population)
  - 75.3% said game subscriptions stayed the same during COVID-19 (compared to 60.5% of general survey population)
  - 74.9% said newspapers/magazine subscriptions stayed the same during COVID-19 (compared to 62.3% of general survey population)
  - 74.5% said ebook buying stayed the same during COVID-19 (compared to 62.1% of general survey population)
  - 79.2% said audiobook buying stayed the same during COVID-19 (compared to 67.1% of general survey population)
  - 66.9% said print book buying stayed the same during COVID-19 (compared to 57% of general survey population)
- 36% of baby boomers said that their borrowing stayed the same during COVID. Baby boomers had an increase in those borrowing fewer books from the library during COVID. Percentage that answered "less":
  - Ebooks: 21.1% compared to 18.5% in the general survey population
  - Audiobooks: 20.3% compared to 16.7% in the general survey population
  - Print: 34.7% compared to 27.7% in the general survey population



The Immersive Media Population tracks the media engagement behavior of seven racial/ethnic groups: African American or Black; Asian or Asian American; European American or White; Hawaii Native or Pacific Islander; Latino, Latina, or Latinx; Middle Eastern or North African; and Native American, First Nations, or Native Alaskan. Three of the racial/ethnic groups were such small proportions of the survey population (and overall U.S. population) that they are not addressed separately because of their small sample sizes. These three racial/ethnic groups are Hawaii Native or Pacific Islander; Middle Eastern or North African; and Native American, First Nations, or Native Alaskan. Therefore, this section will focus on the largest racial/ethnic groups (not listed in order or size): African American or Black; Asian or Asian American; European American or White; and Latino, Latina, or Latinx.

AFRICAN AMERICAN OR BLACK

- 67% of African American or Black respondents are avid book engagers. Significantly higher average number of books engaged with per month than the general survey population:
  - Ebooks: 4.5 (compared to 2.4 in the general survey population)
  - Audiobooks: 2.7 (compare to 1.9 in the general survey population)
  - Print books: 5.2 (compared to 3.9 in the general survey population)
- Increase in respondents who engaged more with books during COVID (5.2% compared to 3.6%) but decrease in respondents who engaged with more TV/movies and games during COVID (compared to the general survey population).
- 26.4% of African Americans said they borrowed more print books from the library during COVID (compared to 23.9% of library card holders in the general survey population).
- How African Americans/Blacks discovered books
  - African Americans/Blacks took more recommendations than the general survey population from
    - booksellers (6.6% compared to 3.9% in the general survey population)
    - librarians (6.2% compared to 4.1% in the general survey population)
    - authors (4.4% compared to 2.4% in the general survey population)
    - social media (9.2% compared to 7.3% in the general survey population)
    - book award winners (2.7% compared to 1.5% in the general survey population)
    - favorite media tie-in (2.1% compared to 1% in the general survey population)
  - African Americans/Blacks had a decrease in recommendations from friends (17.8% compared to 20.9%) and favorite author (7.8%

compared to 15.4%), which is the second-most preferred source of book recommendations in the general survey population.

- Where African Americans/Blacks discovered books
  - Top categories (in this order): browsing online bookstores, in-person author events, browsing shelves in brick-and-mortar bookstores
  - African Americans had an increase in in-person author events (20.6% compared to 13.4%) and virtual author events (11.7% compared to 5%).

ASIAN OR ASIAN AMERICAN

- Group with the highest library card holders: 81% (compared to 75.8% in the general survey population)
- Asians and Asian Americans post more reviews and are more influenced by reviews: 26.3% compared to 15% of the general survey population.
- How Asians and Asian Americans find books
  - Asian Americans had and increase for publisher (5.7% compared to 3.9% in the general survey population), reviews (26.3% compared to 15% in the general survey population), and back cover (4% compared to 2.6% in the general survey population)
- Important book-buying factors for Asians and Asian Americans:
  - Reviews are a more important factor in book buying to Asians and Asian Americans than the general population [note: top three factors in buying books (in this order): genre/category, reviews, author]
  - Asian Americans had a decrease in preference for author (accounting for 15% of selections compared to 23.3% of selections in the general survey population) and genre/category (accounting for 34.8% of selections compared to 39.9% of selections in the general survey population).

EUROPEAN AMERICAN OR WHITE

- European/white Americans engaged with fewer books per month than the general survey population:
  - Ebooks: 2 (compared to 2.4 in the general survey population)
  - Audiobooks: 1.7 (compare to 1.9 in the general survey population)
  - Print books: 3.7 (compared to 3.9 in the general survey population)
- Most important factor in book discovery:
  - Genre/category (42% compared to 39.5% in the general survey population)
  - Author (25.7% compared to 23.3% in the general survey population)
- Least important factors in book discovery:
  - Reviews (13.1% compared to 15% in the general survey population)
  - Front cover (2.7% compared to 3.9% in the general survey population)
- How European/white Americans find books
  - Favorite author (18.4% compared to 15.4% in the general survey population).
  - Social media recommendations are relatively non-influential: 5.9% compared to 7.32% in the general survey population.
- Where European/white Americans find books
  - Browsing shelves in brick-and-mortar bookstores (19.3% compared to 17.4% in the general survey population)
  - Decrease in author events: In-person (10.8% compared to general survey population 13.4%) and virtual (3.6% compared to 5%).
- European/white Americans multitask less when engaging print, ebooks, TV/movies, and games. Only audiobook multitasking stayed the same as the general survey population.
  - Print: 31% (compared to 37.2% in the general survey population)
  - Ebooks: 52.7% (compared to 60.8% in the general survey population)

        - TV/movies: 45.9% (compared to 48.5% in the general survey population)
        - Games: 32.3% (compared to 35% in the general survey population)
    - European/white Americans had a decrease in book buying through various venues:
        - Decrease in buying a book online that they found in a bookstore: 38.2% (compared to 44% in the general survey population)
        - Decrease in buying a book online that they first found in a library: 23.7% (compared to 36% in the general survey population)
        - Decrease in buying a book in a bookstore that they first found in a library: 30% (compared to 31.2% in the general survey population)
        - Decrease in buying a book in a bookstore that they first found online: 23.7% (compared to 44.5% in the general survey population)
        - Decrease in borrowing a book from a library that they first found online: 42.1% (compared to 44.5% in the general survey population)
    - More library card holders: 77% (compared to 75.8% in the general survey population)
    - Less likely to post book recommendations on social media: 34.7% compared to 39.8 in the general survey population.

LATINO, LATINA, OR LATINX

- 59% of Latinx respondents are avid book engagers.
- How Latinx people find books
    - Top ways (in this order): recommendations from friends, recommendations from family, recommendations on social media
    - Latinx had an increase in recommendations from family (14.6% compared to 12.1% in the general survey population), recommendations from influencers (4.6% compared to 2.9% in the general survey population), and recommendations on social media (10.7% compared to 7.3% in the general survey population).

- How Latinx people don't find books
  - Latinx had decrease in recommendations from booksellers (2.7% compared to 3.9% in the general survey population) and favorite author (9.4% compared to 15.3% in the general survey population). Favorite author was the #2 preferred method for the general survey population to discover books, but for Latinx respondents, "author" did not even make the top 3.
- Where Latinx people find books
  - Top places (in this order): browsing online bookstores, in-person author events, browsing shelves in brick-and-mortar bookstores, browsing shelves in libraries
  - In-person author events (17.5% compared to13.3% in the general survey population), browsing online bookstores (32.4% compared to 30.7% in the general survey population), and search engines (8.7% compared to 6.7% in the general survey population)
  - Latinx had decrease in browsing shelves in brick-and-mortar bookstores (12.7% compared to 17.4% in the general survey population) and ebook discounts (2.3% compared to 3.3% in the general survey population)
- Latinx had an increase in respondents who said they borrowed more books from the library during COVID, despite lower library card holders than the general survey population:
  - Ebooks: 27.3% (compared to 21.8% of library card holders in the general survey population)
  - Audiobooks: 26.3% (compared to 18.6% of library card holders in the general survey population)
  - Print books: 31.4% (compared to 23.9% of library card holders in the general survey population)
- Latinx people are the least likely to have a library card of the seven ethnic subgroups surveyed, 69.9%, compared to 75.8% in the general survey population. However, Latinx respondents borrow and buy more books (in all formats) than the general survey population.

  - Latinx had an increase in respondents who bought more books during COVID (compared to the general survey population).
    - 57.6% bought a book online that they first found in a bookstore (compared to 43.9% in the general survey population)
    - 48% bought a book online that they first found in a library (compared to 35.9% in the general survey population)
    - 48% bought a book in a bookstore that they first found in a library (compared to 31.1% in the general survey population)
    - 47.1% borrowed a library book that they first found online (compared to 44.5% in the general survey population)

U.S. REGIONAL DIFFERENCES IN BOOK ENGAGEMENT

The Immersive Media Population tracks the media engagement behavior of five regions: Midwest (MW), Southwest (SW), West (W), Northeast (NE), and Southeast (SE). These regions are based on a consolidated version of the 8 ABA regions. See Appendix 1 for a breakdown of which states fall into which regions.

MIDWEST

- Midwesterners are using libraries for discovery more than any other region
  - Recommendations from librarians: 5.7% (compared to 4.1% in the general survey population)
  - Browsing online library catalogs: 7.7% (compared to 5.9% in the general survey population)
  - Browsing shelves in public libraries: 16.5% (compared to 12.7% in the general survey population)
  - Highest percentage of library card holders: 80% (compared to 75.8% in the general survey population)
- However, despite higher percentage for discovery through libraries and a higher percentage of library card holders, the Midwest was the lowest region for percentage of respondents borrowing *more* ebooks during COVID (17.6% compared to 21.8% of library card holders in the general survey population) and the highest

region for percentage of respondents borrowing *fewer* print books during COVID (29.1% compared to 27.7% of library card holders in the general survey population). In other words, Midwesterners are not borrowing more from the library during COVID.

- Of the five regions, least influenced by family (10% compared to 12.1%) and in-person author events (9.6% compared to 13.3%); most influenced by librarian recommendations (5.7% compared to 4.1% in the general survey population).
    - Region with highest percentage of respondents who reported that their buying of ebooks, audiobooks, and print books stayed the same during COVID
    - Midwesterners are least likely to post book reviews or recommendations to websites or social media: 31.5% (compared to 39.8% in the general survey population)

SOUTHWEST

- Recommendations from family: Highest region for percentage of respondents who said recommendations from family was their preferred discovery method (14.5% compared to 12.1% of general survey population)
- More ebook engagement, but less ebook buying
    - Highest region for average ebooks per month (2.9)
    - 16.3% buying fewer ebooks during COVID (highest region of respondents saying they are buying fewer ebooks during COVID)
- Low engagement and buying of audiobooks
    - Lowest region for average audiobooks (1.4)
    - 17.5% buying fewer audiobooks during COVID
- Lowest region for print books (2.7) per month
- Lowest percentage of library card holders: 69.3%
- Lowest region for bookseller recommendations as a discovery tool: 2.9% compared to 3.9% in general survey population

WEST

- Compared to other regions, the West has the greatest percentage of respondents saying they are buying *more ebooks* during COVID (26.2% compared to 22.5% in general survey population)
- Compared to other regions, the West has the greatest percentage of respondents saying they are buying *fewer print* books during COVID (19.7% compared to 16.4% in general survey population)
- Lowest region for discovering books through favorite author (11.9% compared to 15.3% in general survey population)

NORTHEAST

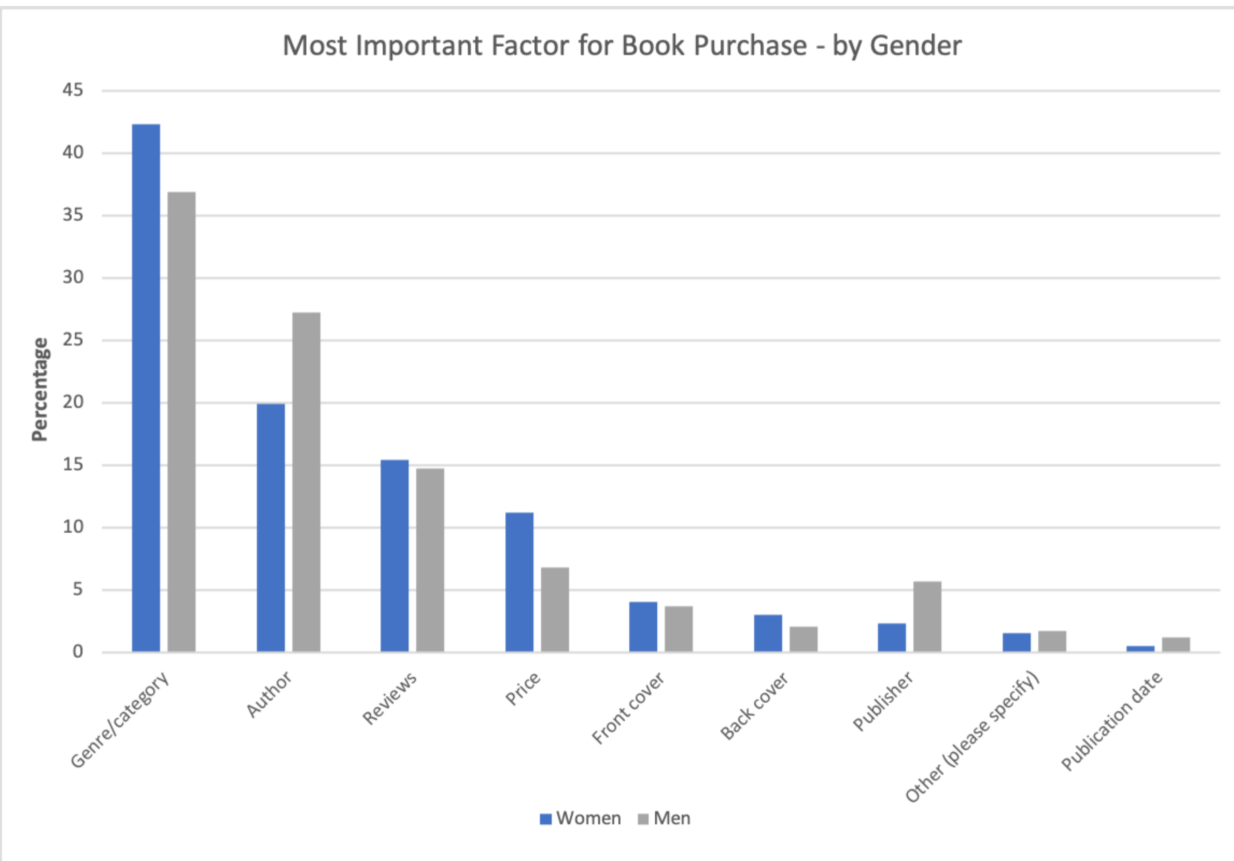
- Highest region for discovering new books by bookseller recommendations (5.5% compared to 3.9% of general survey population)
- Higher percentage of respondents buying more print books and audiobooks during COVID
    - 29% buying more print books during COVID (highest region, compared to 26.5% of general survey population)
    - 21.7% buying more audiobooks during COVID (highest region, compared to 16.9% of general survey population)
- Higher percentage of respondents borrowing more books from the library during COVID
    - 25.2% borrowing ebooks during COVID
    - 21.9% borrowing audiobooks during COVID
    - 25% borrowing print books during COVID
- More likely to post book reviews or recommendations to websites than social media: 46% (compared to 39.8% in general survey population)

SOUTHEAST

- Engage more with audiobooks and print books
    - Highest region for average audiobooks (2.4) and print books (4.4) engaged per month
- Buying fewer ebooks during COVID
    - 16.3% buying fewer ebooks during COVID (highest region, compared to 15.3% of general survey population)

GENDER DIFFERENCES IN BOOK ENGAGEMENT

The Immersive Media Population tracks the media engagement behavior of three genders: men, women, and nonbinary/gender-nonconforming. Because nonbinary/gender-nonconforming respondents were such a small portion of the respondents (0.6%), this section will focus on women and men.



- Men have greater preference for bookseller recommendations than women
  - For books (5.5% for men, 2.6% for women)
  - For games (4.5% for men, 2.7% for women)
- Men are more influenced by authors than women
  - Men had higher percentage of book discovery at in-person author events (15.8% compared to 11.3% for women) and virtual author events (6.1% compared to 4% for women)
  - Author is the most important factor for 27.2% of men in purchasing a book (compared to 19.9% of women)
- Men engage with more audiobooks[2] per month, and also slightly more ebooks and print books. Also highest print engagement per month of the three gender categories.
  - Men's average ebooks per month: 2.8 (compared to 2.4 in the general survey population)
  - Men's average audiobooks per month: 2.5 (compared to 1.8 in the general survey population)
  - Men's average print books per month: 3.9 (compared to 3.8 in the general survey population)
- Women multitask more than men do when reading ebooks and audiobooks
  - 73.4% of women multitask when listening to audiobooks, compared to 66.1% of men
  - 57.7% of women multitask while reading ebooks, compared to 53.5% of men
- Men post reviews on websites/social media
  - 44% of men post book reviews, compared to 36% of women

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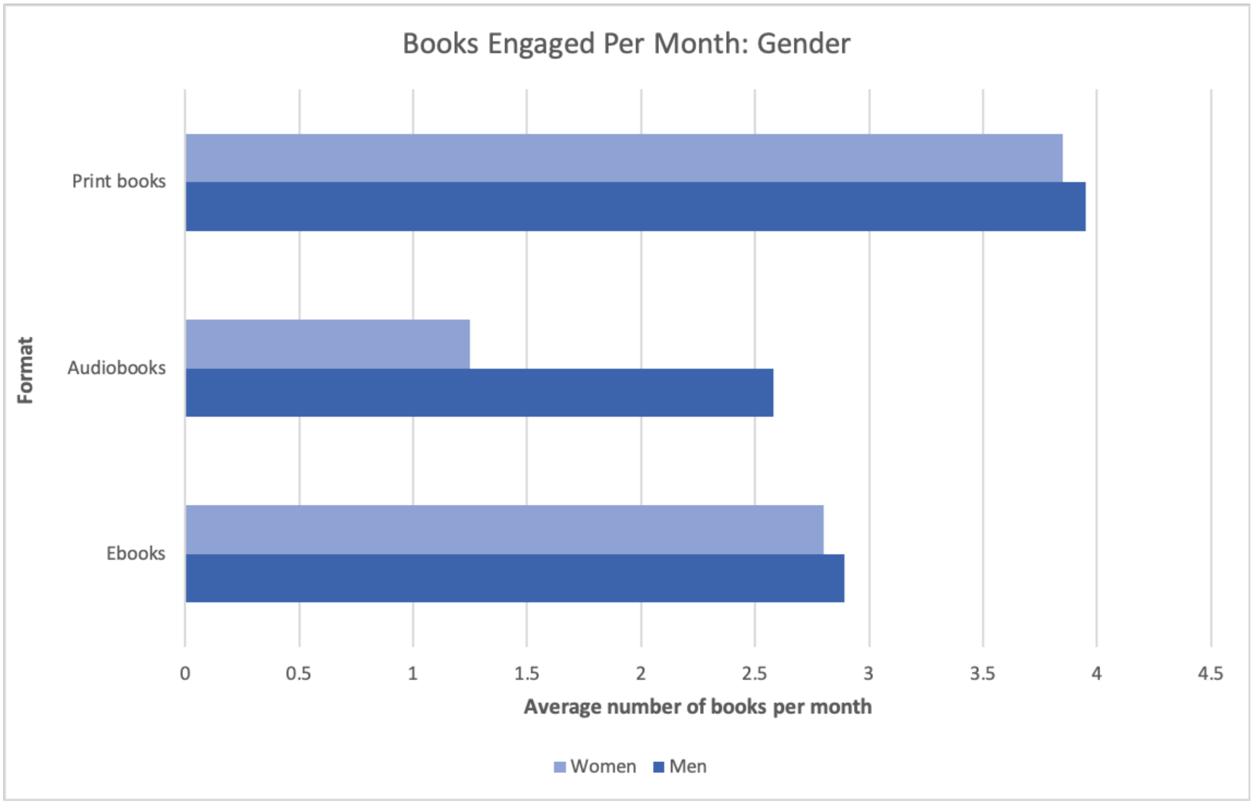
[2] According to 2017 Edison Research, 56% of men are avid audiobook listeners (listened to 4 or more audiobooks in the last year). A 2020 research study conducted by Harris Interactive and commissioned by *The Bookseller* about audiobooks in the UK shows that audiobook listening was twice as common among men as women.

    - 40.1% of men post TV/movie reviews, compared to 32.2% of women
    - 35.9% of men post game reviews, compared to 22.7% of women
- More women gift books than men: 61% of women compared to 17.7% of men
- Price (11.2% for women and 6.8% for men) and genre/category (42.3% for women and 36.9% for men) are more important to women when buying a book than to men
- Women had the lowest buying behaviors of the gender categories in the following venues:
    - 37.6% buy a book online that you first found in a bookstore (compared to 51.1% of men)
    - 30.1% buy a book online that you first found in a library (compared to 42.6% of men)
    - 25.6% buy a book in a bookstore that you first found in a library (compared to 37.8% of men)
    - 40.4% buy a book in a bookstore that you first found online (compared to 49.2% of men)
    - 41.7% borrow a book in a library that you first found online (compared to 47.5% of men)
- A higher percentage of women said they borrow less from the library during COVID in audiobook and print (compared to men)
    - Especially print: 30.8% of women said their print book borrowing from the public library decreased during COVID (only 24.2% of men)


Books Engaged Per Month: Gender
Format
Print books
Audiobooks
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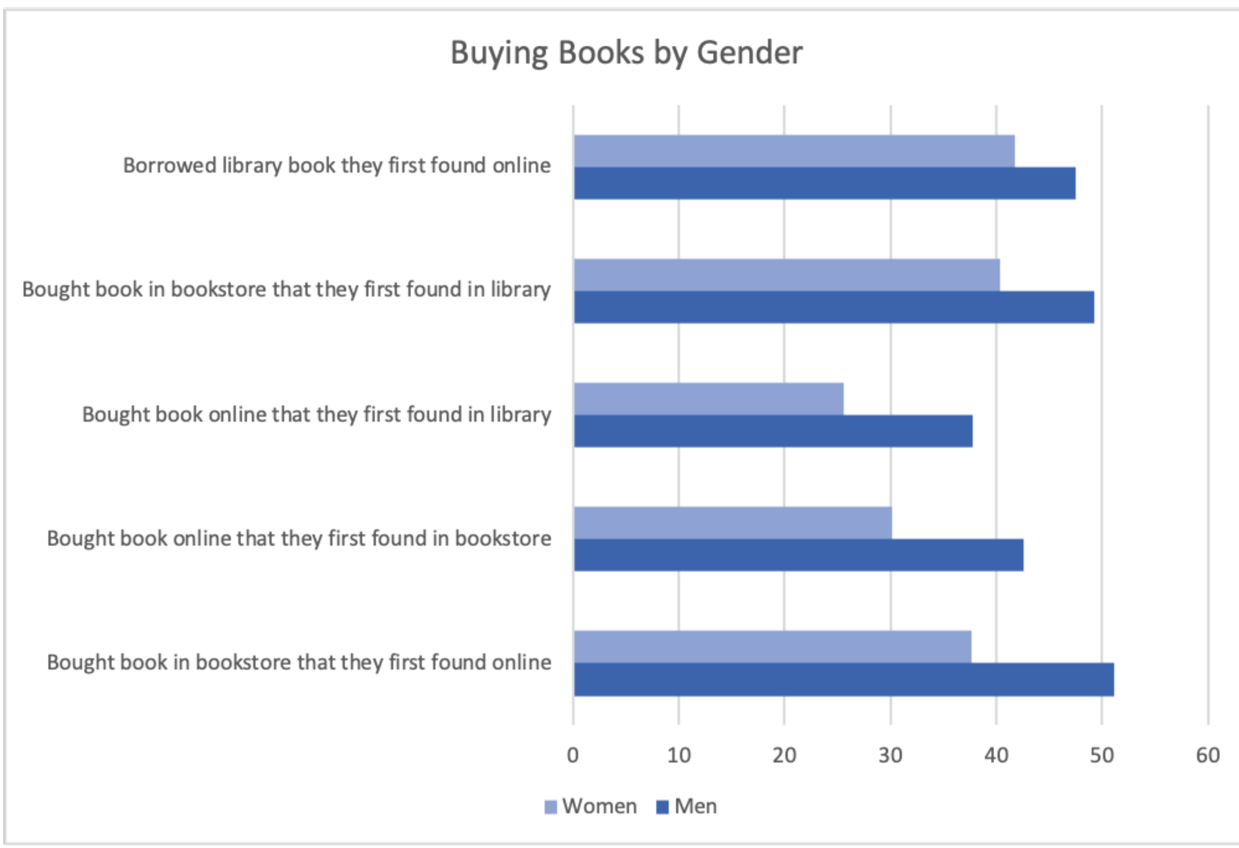
4.5
Average number of books per month
Women
Men


Buying Books by Gender
Borrowed library book they first found online
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50
60
Women
Men

BOOK INDUSTRY STAKEHOLDERS

The Immersive Media data supply insights of broad interest to book industry stakeholders, and to particular communities within the book industry. Patterns of discovery, purchase, borrowing and gifting are collated against demographic data presented above. Cross-tabulating the data allows for granular insights about three sub-populations: Avid Readers, Multitaskers, and Pirates. Pirate behavior is of particular importance, because their actions might shed light on future or emergent behaviors in book buying as more daily life and entertainment moved online during the pandemic.

In this section, there's occasional repeat of some information because the data is relevant to more than one stakeholder category. We wanted to make it easy for stakeholders to find what's important to them without having to do much cross-referencing in other sections.

BOOK PUBLISHERS

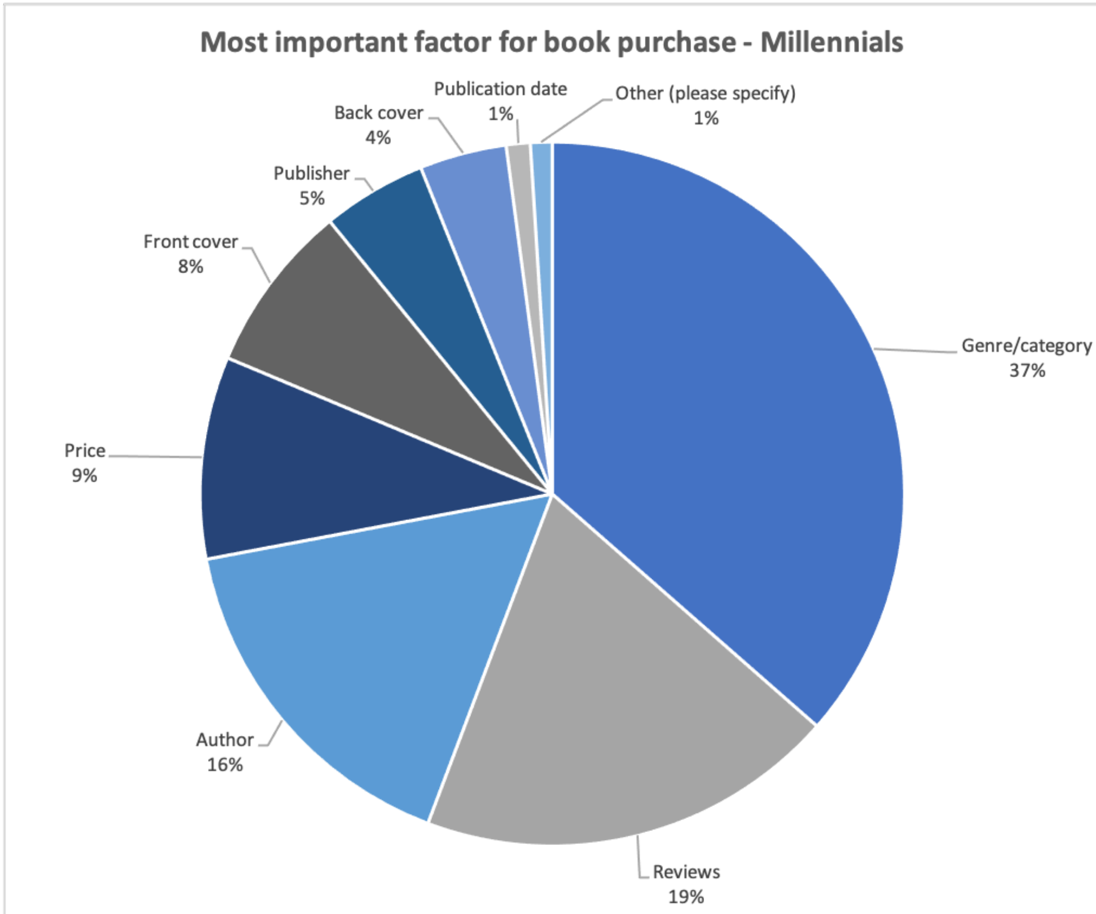
Millennials Are Avid Book Engagers

For publishers who worry that "flat is the new up," pandemic book sales are a bright spot; NPD reports 8.2% sales growth in 2020. Immersive Media data reveals that this surge is attributable to the behaviors of one subgroup: avid book engagers. Avid book engagers are the key demographic publishers should focus on as they optimize for post-pandemic growth.

The most surprising finding regarding avid book engagers is that they are young, ethnically diverse, and active in social media. European or white Americans were just 38.9% of the millennial population (compared to 66.6% of the general survey population); by contrast, there were almost twice as many Black millennials (24.4%, compared to general survey population 13%), Asian or Asian American Millennials (10.4%, compared to general survey population 5.7%) and Latinx millennials (25.4% compared to general survey population 12.9%). This double-concentration of nonwhite avid book engagers is a market to watch.

Millennials are more open to book recommendations than the general survey population, reporting above-average receptivity to recommendations from friends, family and social media (in that order), and also, less commonly, from booksellers, influencers/celebrities, and book award-winners. These last three recommendation sources were not applicable to the general survey population, nor among Boomer women. In many ways, millennials' book behavior is the mirror image of Boomers'. Boomers are less likely to attend author events; Boomers have the least cross-media discovery, and Boomer women in particular are inactive in posting reviews or heeding reviews on social media.

Millennials' openness to suggestion tells us they seek information from a wide range of sources, and they don't browse as much as other populations.

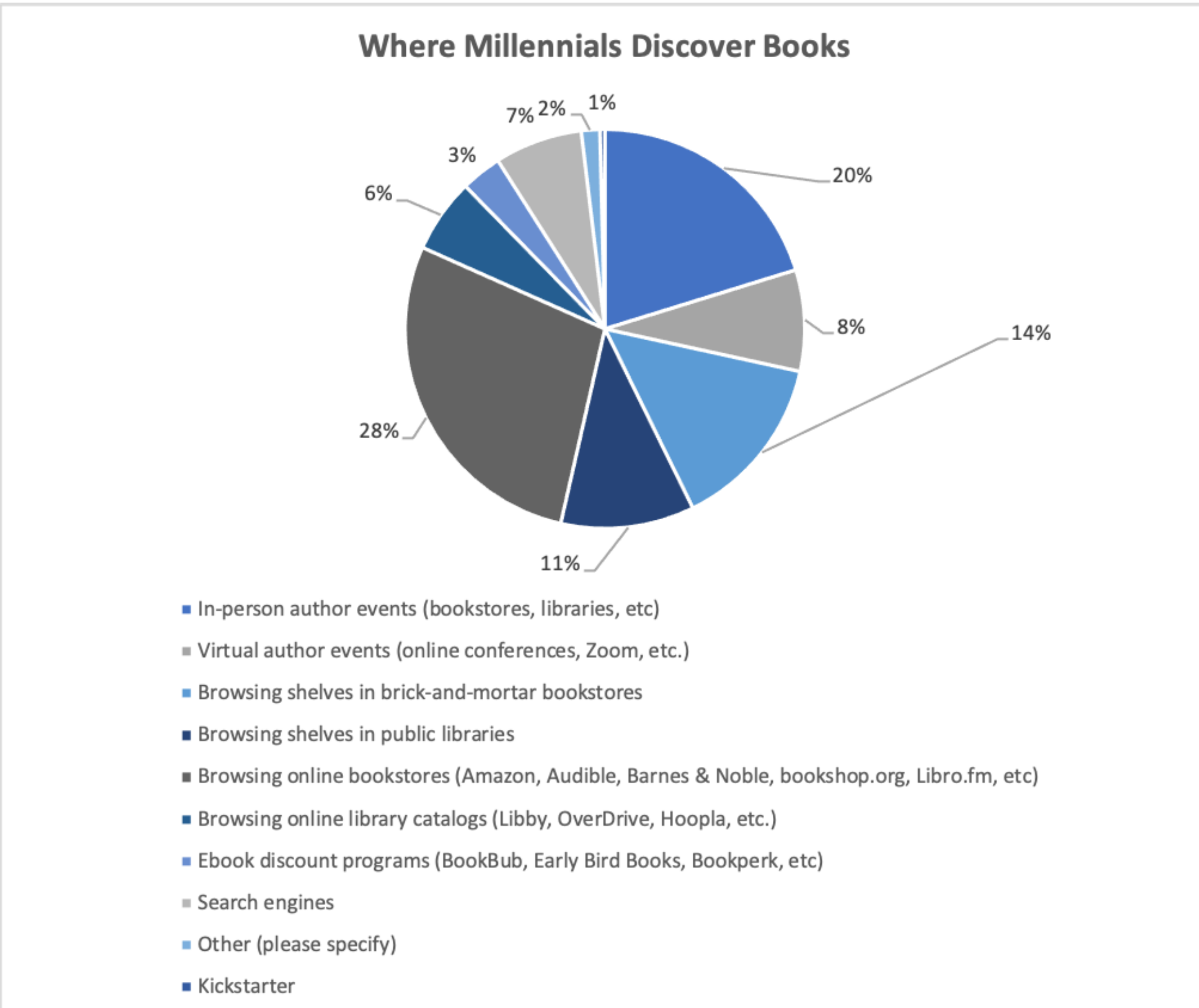


Millennials do these bookish activities more than the general survey population:

- Post more book reviews (52.3% compared to 39.8% in the general survey population),
- Attend more in-person author events (20.2% compared to 13.3% in the general survey population)
- Attend more virtual author events (8.2% compared to 5% in the general survey population).

Millennials do these activities less than the general survey population:

- Browse shelves in bookstores (14.3% compared to 17.4% in the general survey population),
- Browse shelves online bookstores (28.1% compared to 30.7% in the general survey population) and
- Browse shelves in libraries (10.8% compared to 12.7% in the general survey population).



From these behaviors we conclude that millennials discover books through word-of-mouth more than search. In every context except book gifting, millennials are more engaged with books than their counterparts in GenX and Baby Boomers.

While book engagement in the general survey population stayed the same during COVID (movies and TV consumption grew across all surveyed populations), avid book engagers consumed all media avidly, and this didn't dampen their appetites for books. In fact, millennials had the greatest cross-media discovery of the three age categories:

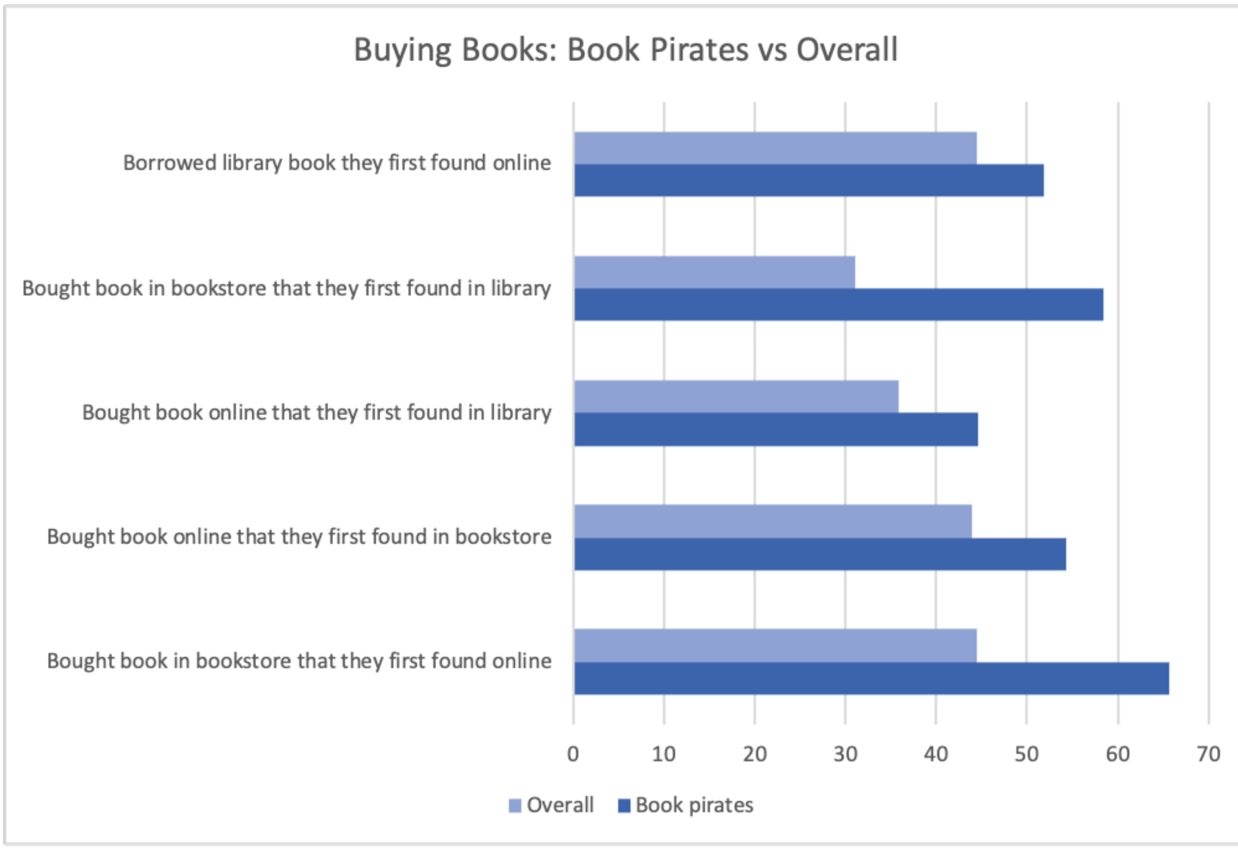
- From books: 72.4% (compared to 60.3% in the general survey population)
- From TV/movies: 72.9% (compared to 61.2% in the general survey population)
- From games: 48.1% (compared to 33.1% in the general survey population)

Other media are more likely to be gateways to book publishers' products than siphons. Avid, book-engaging millennials bought more books than any other age group despite also consuming more media in movies/TV and games. Millennials' book discovery habits are context-agnostic. That is, they discover books in one place and are just as likely to buy it in another. 60.7% bought a book at a bookstore that they first found online; slightly fewer (59.3%) bought a book online that they found in a bookstore. Discovery at a library led to a purchase online (50.9%) or in a bookstore (47.9%). Millennials are more likely to borrow a book that they first found online (52.7%, compared to 44.5% in the general survey population). All roads lead back to the fact that millennials consume more books across formats than other age groups, even among avid book engagers of other generations. Millennials' print book consumption significantly outpaced GenXers and Baby Boomers (5.3/books month compared to 3.8 for non-millennial avid book engagers).

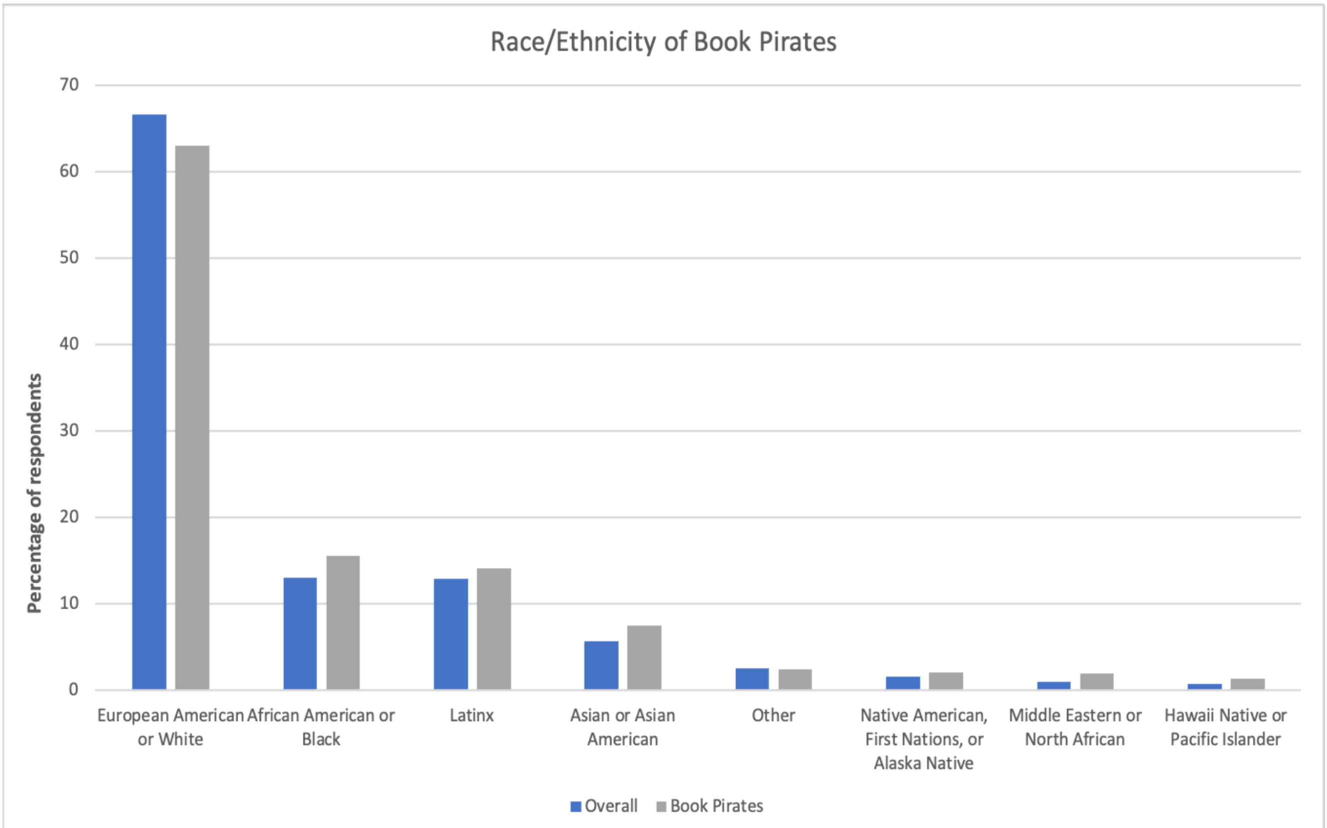
Pirates Buy More Books Than the General Survey Population

14.4% of respondents (6.9% of responses) engage in book piracy. Again, survey respondents could select more than one type of engagement with books, to capture the full range of behaviors. That's why *responses* data are called out separately from *respondents* data. Book piracy is defined as reading and/or downloading books that typically cost money (not public domain) from a website where other readers have posted copies for free. While piracy deprives the entire publishing value chain of money, survey data demonstrate that book pirates are also paying book customers, and paying customers of other media as well. Using data to discover where pirates find value worth paying for and where they do not will help the industry understand their products and customers better. Such understanding is crucial as the twin factors of a youth culture accustomed to streaming and 5G connectivity (5th generation broadband cellular networks) will only create more favorable conditions for piracy.

Surprisingly, pirates avidly buy books. They do not simply steal books and dart away. Pirates' book buying and borrowing rose across all media and in all venues (bookstore, online, library) during the pandemic. For example, book pirates are buying books that they discover in libraries: 58.4% of pirates bought a book at the bookstore that they first discovered at a library. 54.3% of pirates bought a book online that they first found in a library (compared to 35.9% of the general survey population).



Compared to the general survey population, a higher percentage of book pirates during COVID are buying more ebooks (38.7%), audiobooks (27.1%) and print books (33.7%); a higher percentage of book pirates are also borrowing more ebooks (30.1%), audiobooks (31.6%), and print books (28.5%). A high portion of pirates own library cards (77.2% compared to 75.8% of the general survey population). Book pirates are younger; greater percentages of them are men and BIPOC people than the general survey population. The data show that book pirates are avid, readers who will buy books when the value proposition is clear to them; for example, pirates are much more likely than the general survey population to buy books in multiple formats (41.5%).



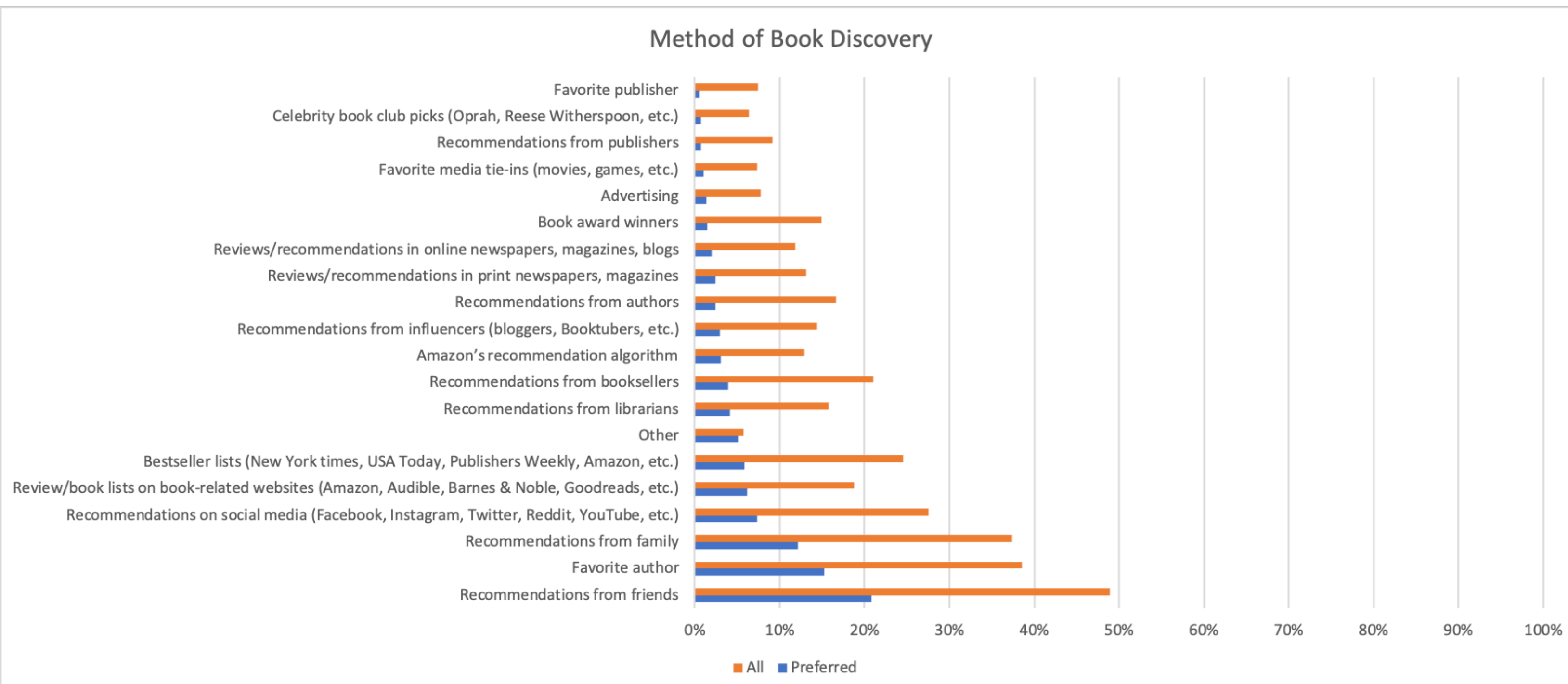
Giveaways for book marketing/promotion is a good place to demonstrate product value and establish relationships with pirates. 35.3% of pirates said they read/download free books for marketing promotions; just 17.7% in the general population do so. Inviting book pirates to download free books allows publishers to build a relationship with pirates. It would also allow publishers to harvest data about pirates' reading activity (this would require both software and appropriate disclosure). Do pirates read the free book immediately or store it? How far do they get in the book before they give up, or do they complete the book? How quickly? Reader completion data in exchange for free book giveaways to pirates could be a relationship-building win/win.

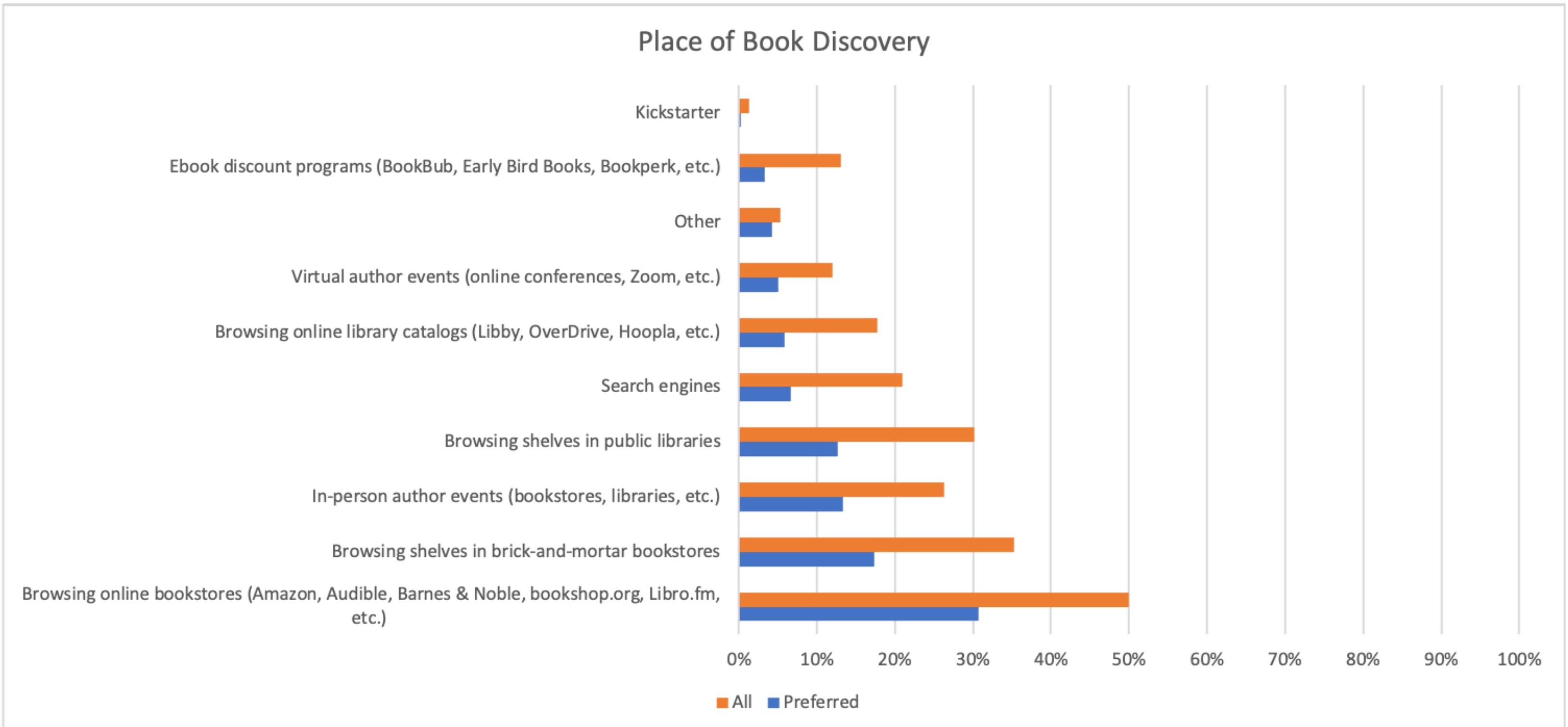
Book Discovery for Publishers

Book discovery is both a *who* question and a *where* question: whose recommendations influence a person's book engagement, and where does that person go to find the book?

One survey question supplied twenty multiple choice options to capture the wide range of ways people discover books. We asked respondents to check *all* the ways they find books; we asked them to select the #1 most reliable way they find books; and we asked them about whether consuming other media (like TV, movies and video games) leads them to find books. (To review survey questions, see Appendix.)

The general survey population found books via recommendation from friends (20.8%), favorite authors (15.3%) and family (12.1%); the general survey population strongly preferred browsing online stores (30.7%) such as Amazon, Audible, Barnes & Noble, bookshop.org, Libro.fm, etc. But it's worth noting the huge range of preferred, #1 ways people find books. The scattershot reinforces that people's attention pings among many contexts.





BOOKSELLERS

Book Discovery Through Bookstores

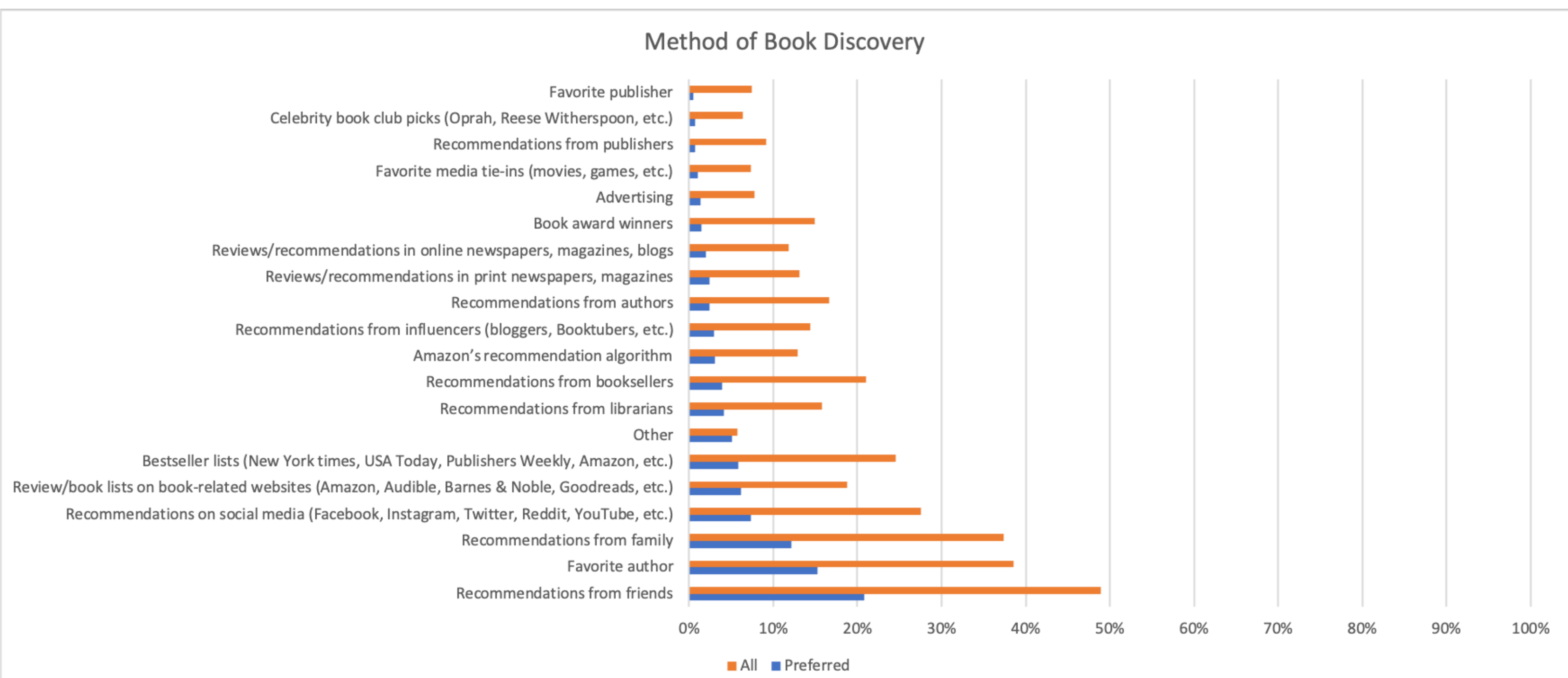
The survey found good news for booksellers: 44.5% of people bought a book in a bookstore that they first found online. This datum disrupts the general trend of pandemic-era commerce moving online due to lockdowns and social distancing restrictions. The data are slightly higher for bookstore purchase (44.5%) than online book purchases (43.9%). This data says something interesting about the online and brick-and-mortar relationship: it is not nearly so one-sided as assumed. After years of independent bookstores as “showrooms for Amazon”, it turns out that Amazon (and other ways to find books online) also serve as showrooms for brick-and-mortar bookstores.

Similarly, libraries contribute more to book discovery and purchase than is acknowledged and utilized in the industry; 35.9% bought a book online that they first found in the library. This percentage is higher for avid book engagers (those who engage with 4+ books per month), for whom 51.6% bought a book online that they first found in a library.

Additionally, 31.1% bought a book in a bookstore that they first found in the library.[3] For avid book engagers, this percentage was again higher: 44% of avid book engagers bought a book in a bookstore that they first found in the library.

NPD reports that book sales are up during COVID, and the data support this finding not just with books but across media. On average, people are engaging with books frequently, with an average of 2.4 ebooks per month, 1.8 audiobooks per month, or 3.8 print books per month. The two most common categories for changes in book buying habits during COVID were “stayed the same” and “more.” People are not engaging with fewer books during the pandemic; on the contrary, book engagement remains strong.

Recommendations from booksellers are a small proportion of the discovery tools for book engagers. Only 3.9% said they discover books through recommendations from booksellers as their preferred method of book discovery. An approximately equivalent proportion of game engagers relied on bookseller recommendations: 3.5% find games from bookseller recommendations. Men were slightly more likely to prefer recommendations from booksellers as their book discovery tool (5.5%), and women were less likely to prefer recommendations from booksellers for book discovery (2.6%). There is still a gap and opportunity for booksellers here to find ways to better frame bookseller recommendations as useful to discovery and easy to access. After all, bookseller recommendations can



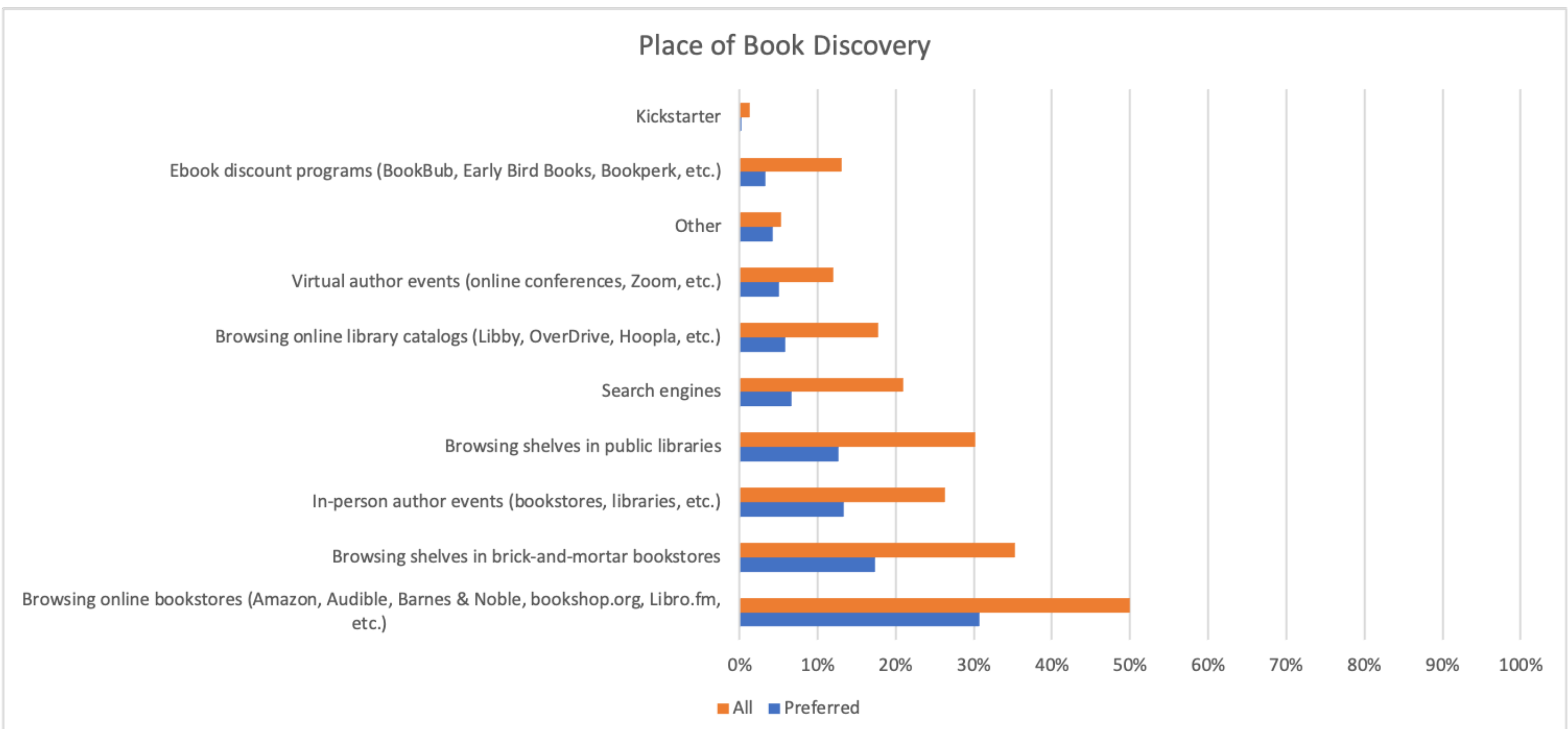
[3] Note that this datum is out of 2318 responses, rather than the entire dataset of 4314 responses.

capitalize on providing the value of surprise, drawn from years of book experience, that the automated patterns of algorithms cannot.

It should be noted that recommendations from booksellers come in many different forms, some more overtly visible as "bookseller recommendations" to readers than others. For example, shelf talkers—handwritten bookseller recommendations tucked next to a book on a shelf in a bookstore—are usually not recognizable as book recommendations to readers, who are accustomed to seeing written recommendations and reviews regularly in the online social media space. Just because the shelftalker aspect of bookseller recommendation might be invisible to book engagers does not mean that readers are not influenced by such recommendations.

Beyond recommendations from booksellers, bookstores (whether online or brick-and-mortar) are also *places* of discovery: 17.4% preferred to discover books by browsing brick-and-mortar bookstores and 30.7% preferred to discover books by browsing online bookstores (which includes Barnes & Noble, bookshop.org, and individual independent bookstore websites). In fact, browsing online bookstores is the top preferred place that people go to discover books, followed by browsing brick-and-mortar bookstores.

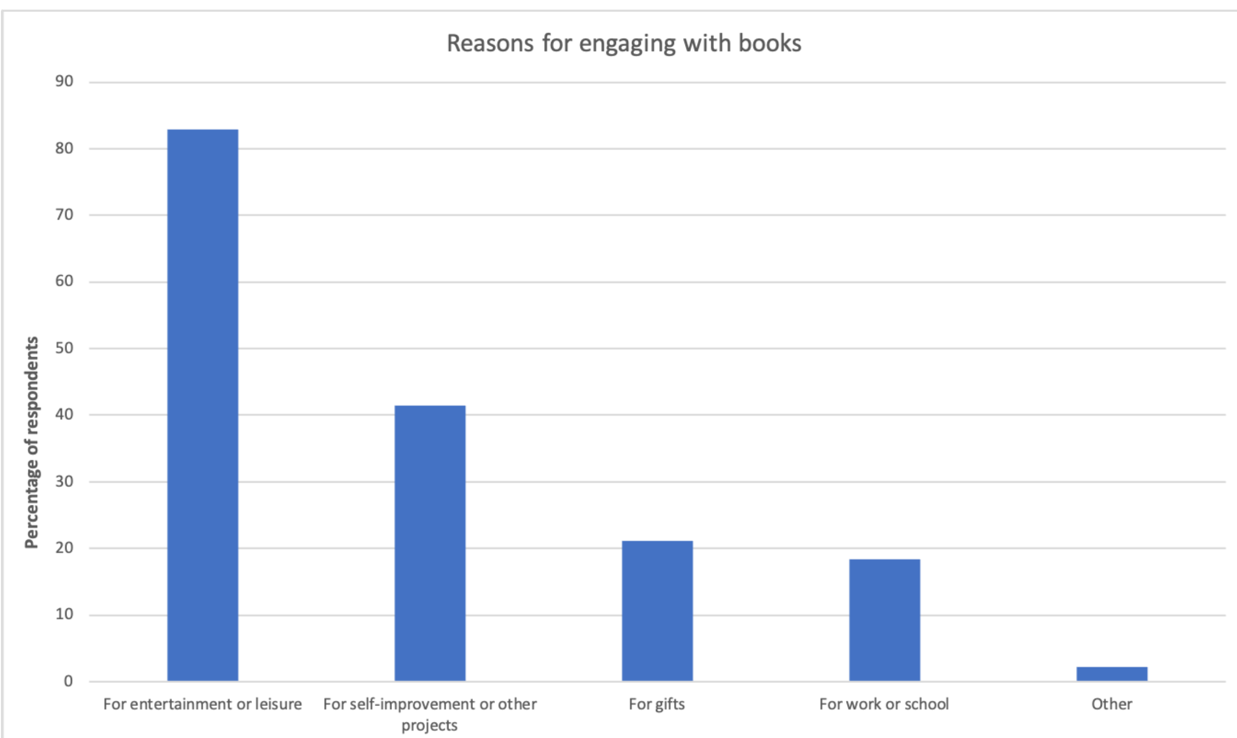
There's an opportunity for relationship-building and engagement-sharing between bookstores and libraries. At first glance, this may sound counterintuitive since bookstores

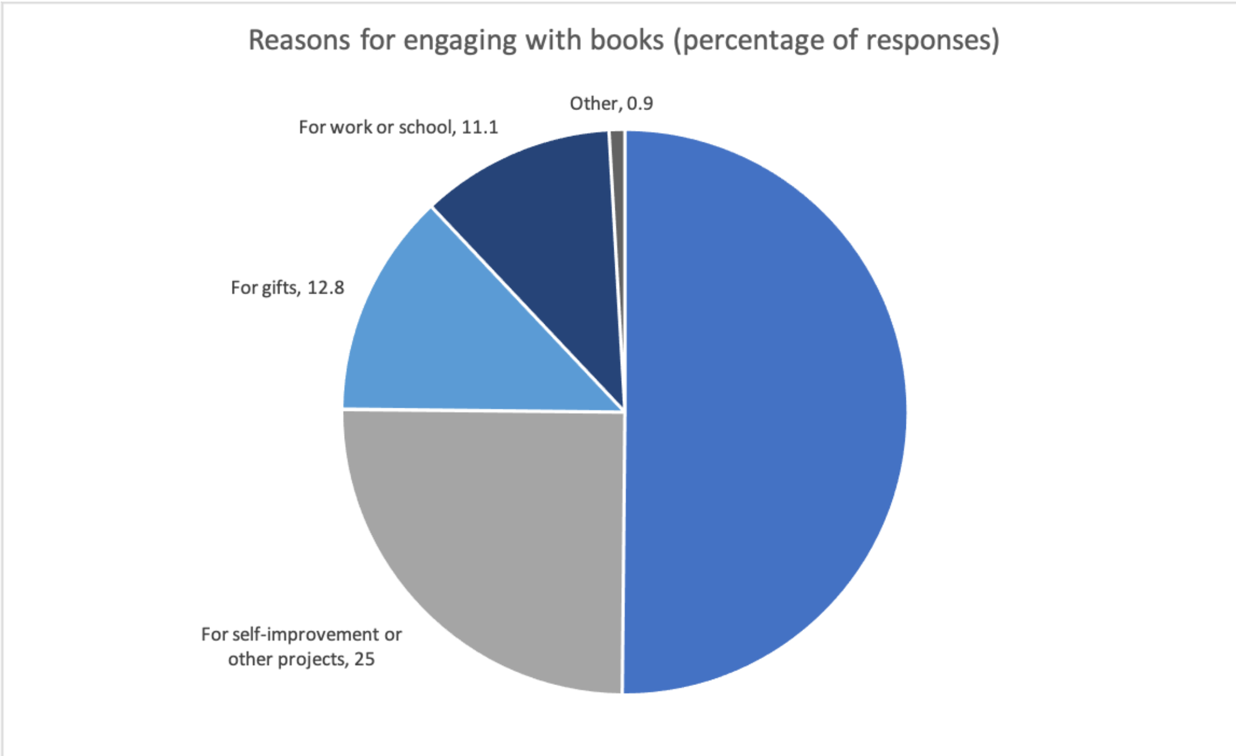


sell books and libraries offer borrowed copies for free. (Although the library is not free, as the books are paid for by tax dollars). The fear has been that free access to books via libraries eats into book sales. However, when a book is unavailable from the public library, after the most common answer of putting themselves on the hold list, there are two other things that people are most likely to do: 1) buy it from an online bookstore (23.2% of respondents or 17.5% of responses) and 2) buy it from a local bookstore (18.3% of respondents or 13.8% of responses). Therefore, when library patrons are unable to find available books through the library, they turn to online and brick-and-mortar bookstores next to purchase the book.

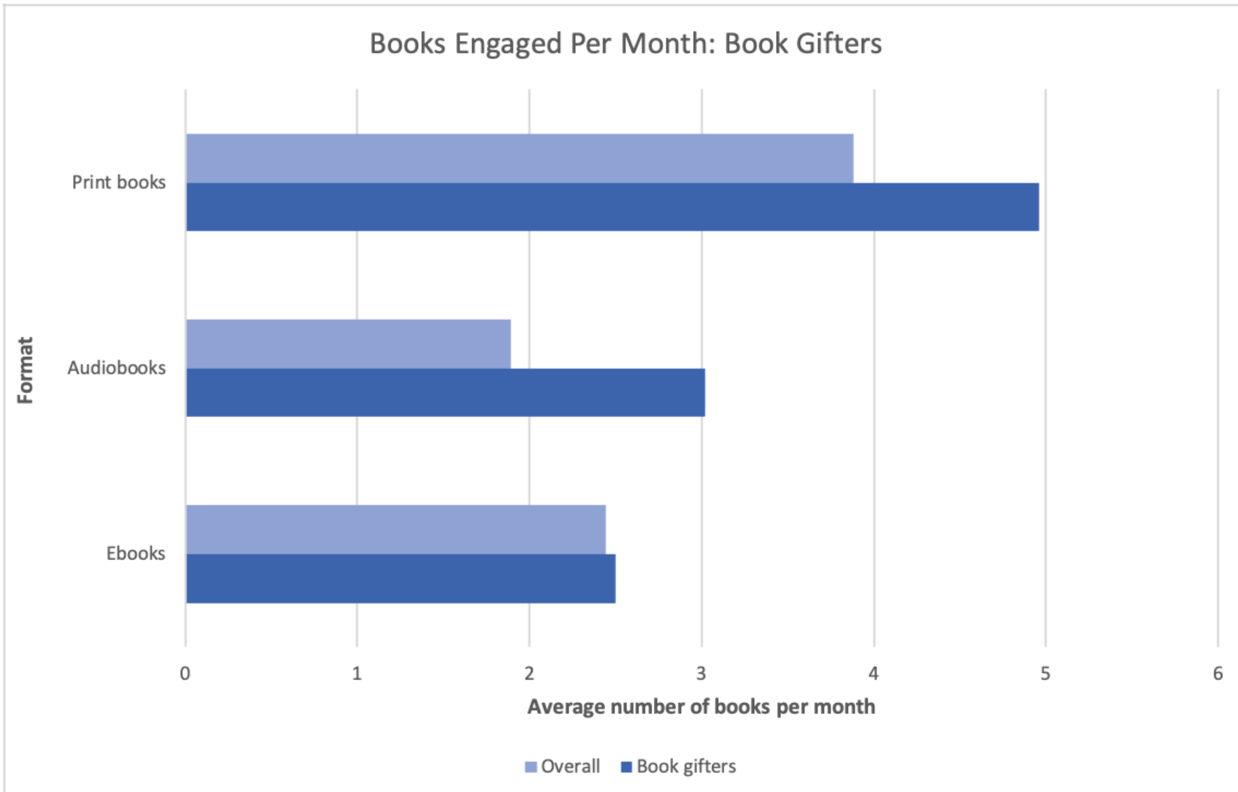
When online and brick-and-mortar bookstores serve as places of discovery, author events (whether in-person or virtual) provide valuable touchpoints for readers to connect with the #2 most important factor in their book-buying decisions: author (23.2%). For author events, 13.3% preferred in-person author events (in bookstores, libraries, etc.) for book discovery; 5% preferred virtual author events for book discovery. Avid book engagers (those engaging with 4+ books per month) have even higher preference for author events: 16.8% for in-person author events and 7.4% for virtual author events for book discovery.

Book Gifters





Book gifters make up 21.2% of the survey population and are composed of more baby boomer white women than the general survey demographics. These are individuals who said that they engage with books by giving them as gifts. Of book formats, print books are the most "giftable", and this is evident in the average number of print books engaged with per month: 4.9 (compared to 3.8 for the general survey population). In other words, book gifters are engaging with more print books specifically.



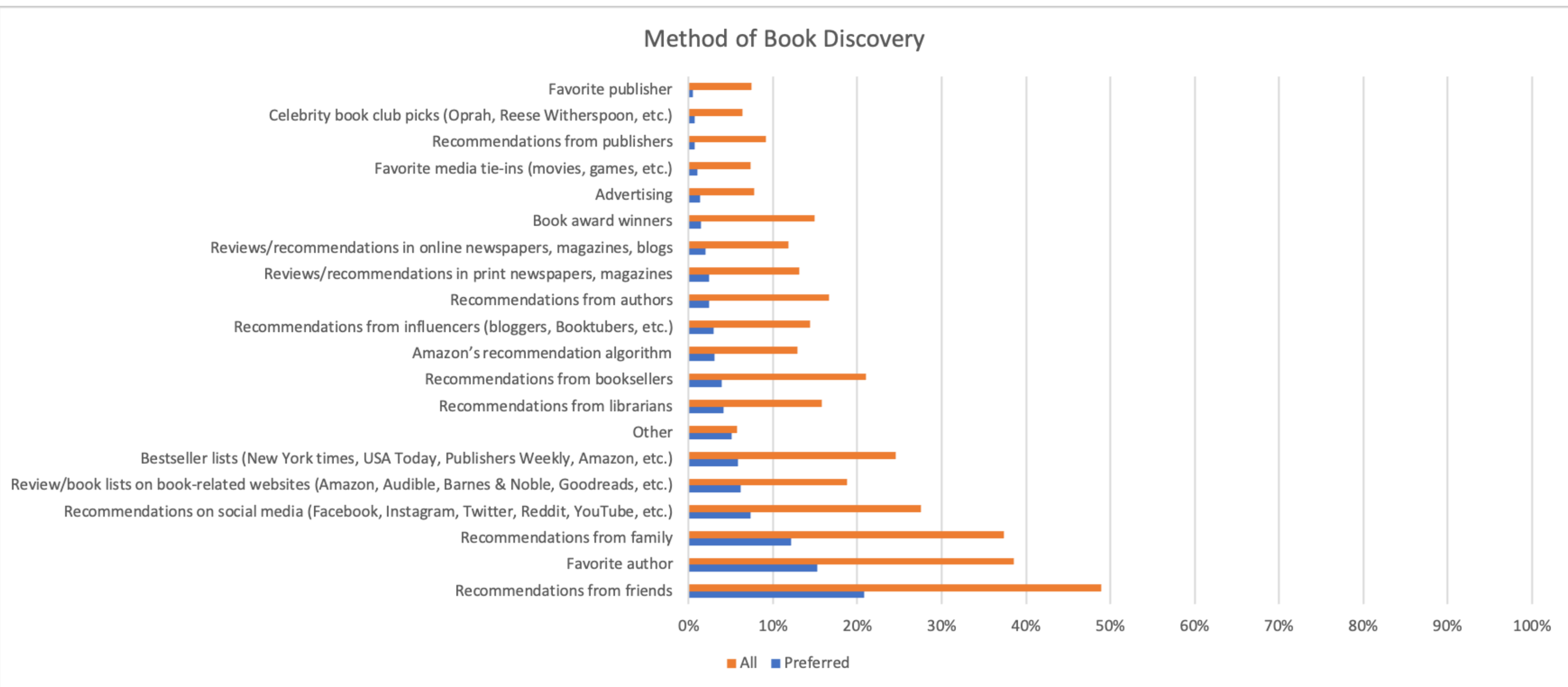
Book gifters are a missed opportunity for booksellers. Already, recommendations from booksellers are a small percentage of preferred discovery in the survey, but this is even lower for book gifters: 2.9%. However, book gifters are doing more browsing in bookstores than the general survey population: 20.5% of book gifters prefer to discover books by browsing in brick-and-mortar bookstores and 32.8% of book gifters prefer to discover books by browsing online bookstores. In other words, book gifters are discovering books through browsing in bookstores (online and in-store). However, they are not engaging with booksellers for recommendations.

LIBRARIES

Libraries as Discovery Tools

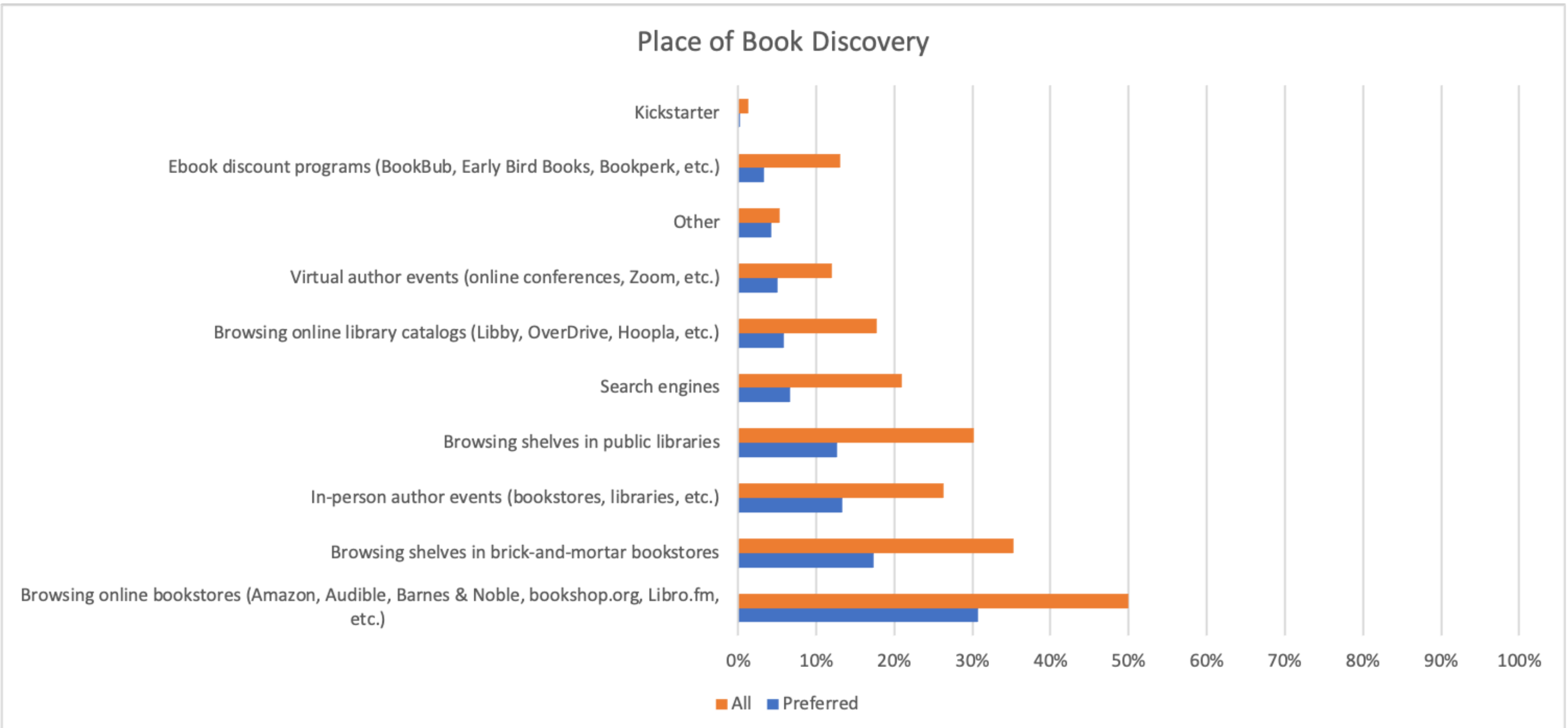
Libraries are tools of discovery and drivers of book sales, as the Immersive Media study shows. Discovery through libraries can lead to book sales: 35.9% of respondents bought a book online that they first found in a library, and this percentage is higher for avid book engagers (those who engage with 4+ books per month). 51.6% of avid book engagers bought a book online that they first found in a library. Library discovery is also leading to book purchase in brick-and-mortar bookstores: 31.1% bought a book in a bookstore that they first found in a library—44% for avid book engagers.[4]

However, despite the tie between library book discovery and book buying, recommendations from librarians make up relatively small percentages of the ways in which people are finding books, TV show, movies, and games. Only 4.1% of respondents discover books through recommendations from librarians, which is a missed opportunity for libraries in connecting librarians and patrons through book discovery. Similarly, only 4.2% of respondents discover TV shows/movies/sporting events and 3.6% games from recommendations from librarians.



[4] Note that this datum is out of 2318 responses, rather than the entire dataset of 4314 responses.

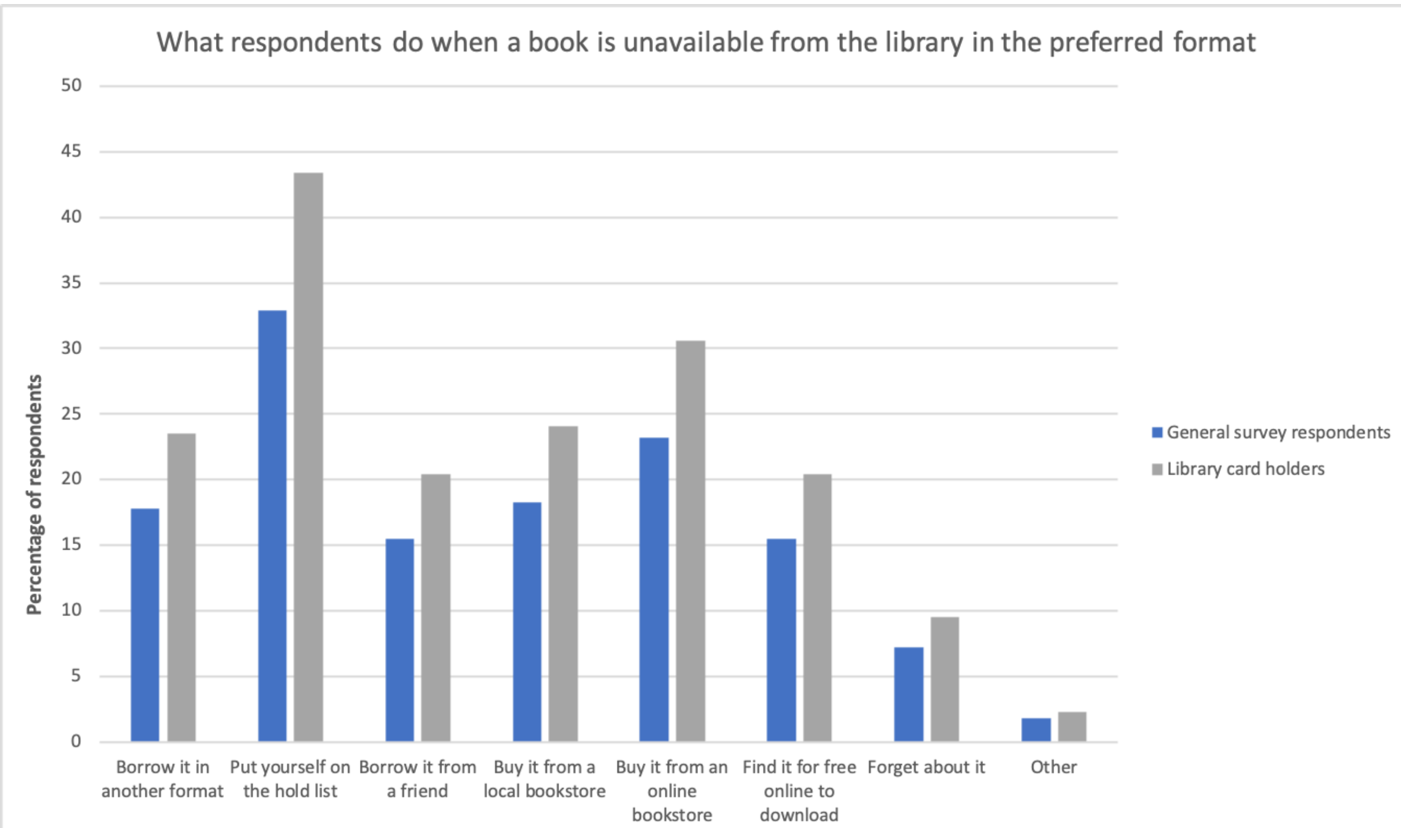
But just because respondents aren't discovering books (and other media) through recommendations from librarians does not mean that they are not finding books through libraries. 12.7% find books browsing shelves in public libraries and 5.9% find books browsing shelves in online library catalogs. 10.8% borrow DVDs/Blu-Rays from the public library.

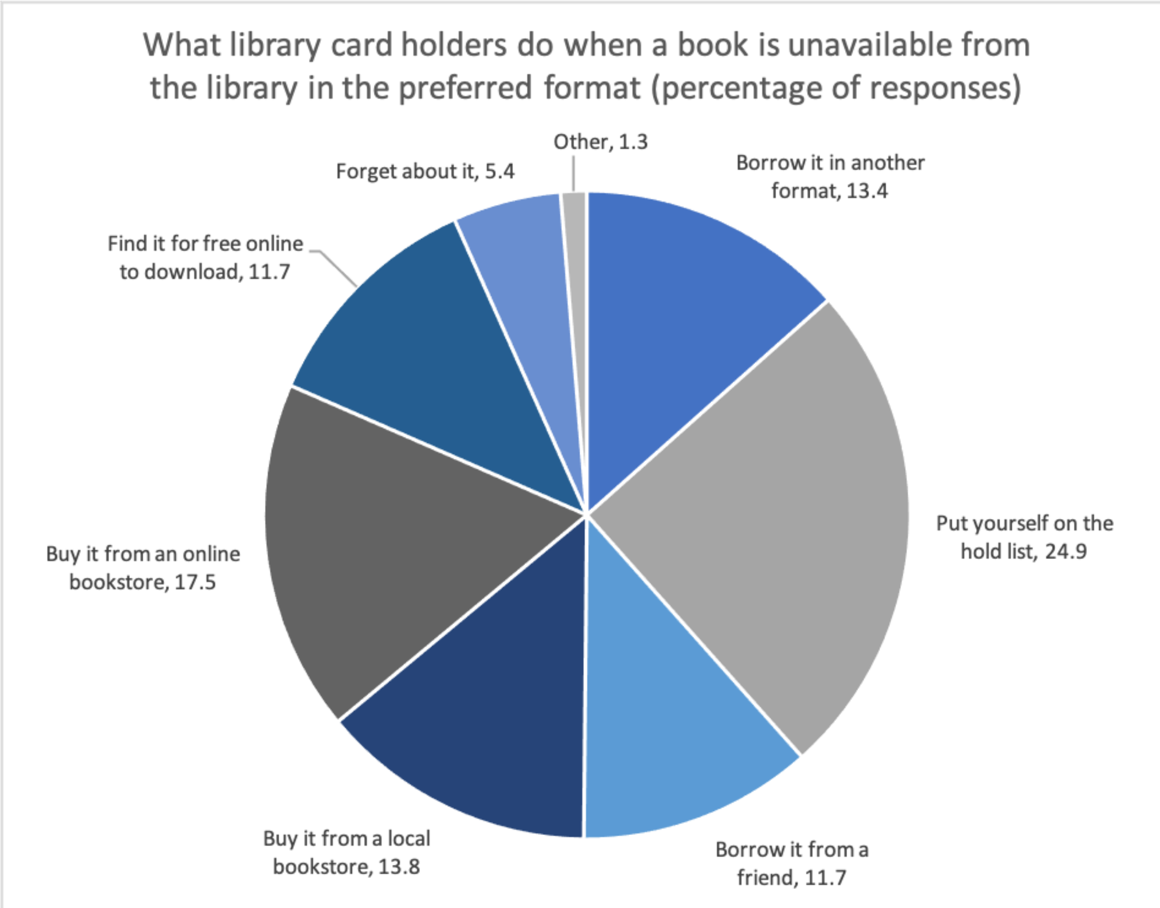


The impact of recommendations from librarians and browsing both online and in-person library shelves on discovery varied according to region of the U.S. as well. Recommendations from librarians, browsing shelves in public libraries, and discovering books through library catalogs were particularly high as discovery tools for participants in the Midwest region. Midwest discovery through recommendations from librarians was 5.7% (compared to 4.1% of the general survey population), browsing shelves in public libraries 16.5% (compared to 12.7% of the general survey population), and discovering books through online library catalogs 7.7% (compared to 5.9% of the general survey population). The five regions in the US differed most greatly from each other for two places where respondents discovered books, and one of these is browsing shelves in public libraries. This indicates that while the Midwest has high rates of book discovery through librarian recommendations and library browsing, library discovery (and the library experience overall) is a disparate experience for Americans across different regions.

Libraries and sales

There are two cross-sections of the respondents who engaged with books the most: avid book engagers and book gifters. Avid book engagers engaged with 4 or more books per month (in any format) and book gifters had selected "gifting" as a reason that they engaged with books. These two groups reveal an important finding: those engaged with books in paid ways are also more likely to engage with books in free ways too (public libraries, borrowing from friends, free little libraries, downloading public domain works, pirating, etc.). This supports the idea that engaging with books in free ways (such as through libraries) does not necessarily cannibalize sales; avid book engagers engage in many ways: paid and free, across genres, and across formats.

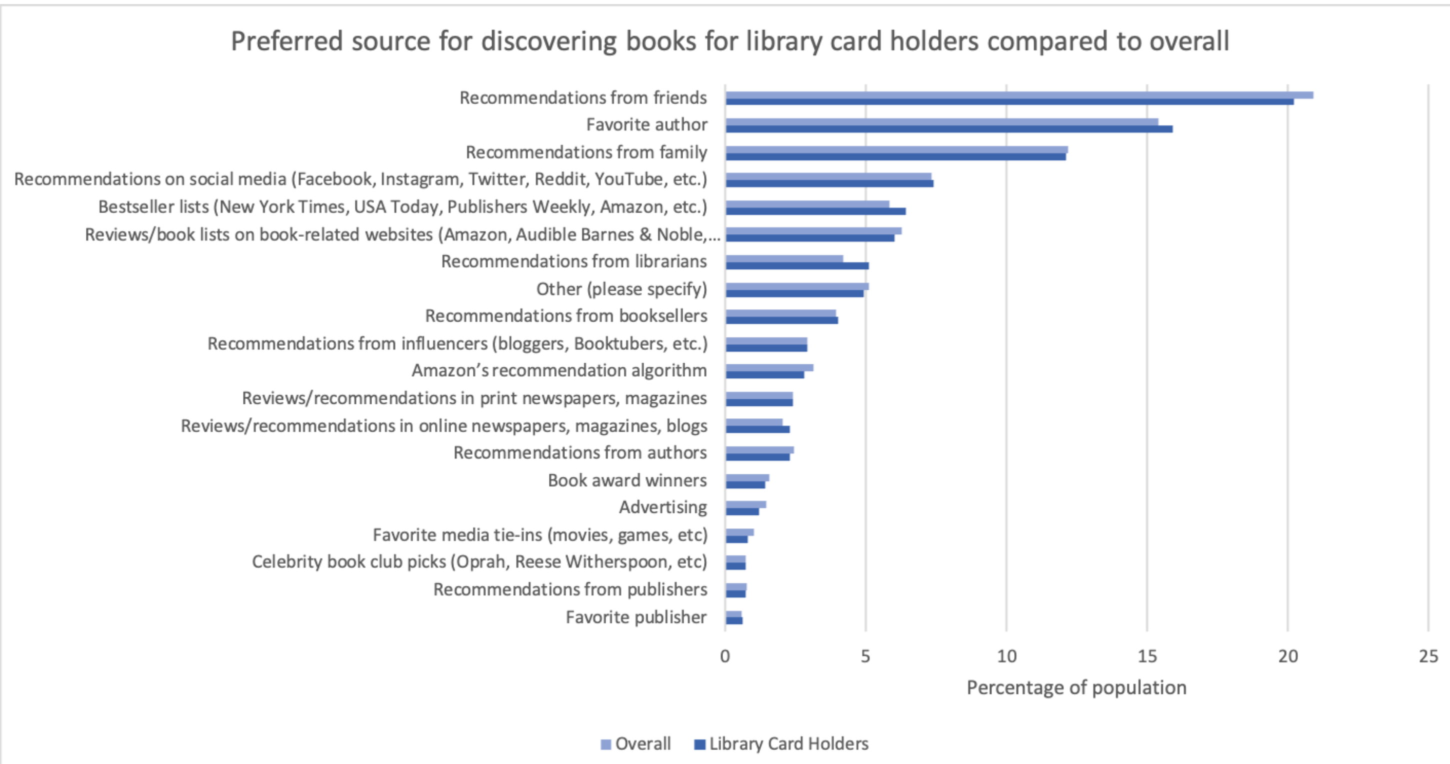




When a book is unavailable from the library, there are several options for patrons: borrow it in another format, put themselves on the hold list, borrow it from a friend, buy it from a local bookstore, buy it from an online bookstore, find it for free online to download, forget about it, and other. Survey respondents could select more than one type of engagement with books, to capture the full range of behaviors. That's why *responses* data are called out separately from *respondents* data. Put yourself on the hold list was the top choice (32.9% of respondents or 24.9% of responses), followed by buy the book from an online bookstore (23.2% of respondents or 17.5% of responses), or buy the book from a local bookstore (18.3% of respondents or 13.8% of responses). Thus the book being unavailable at the library can be a catalyst for purchase of the book. However, the frequent unavailability of books at libraries or long wait times in the hold line can also push readers into piracy: 15.5% of survey respondents turn to piracy when the book is unavailable through the library in the desired format. Add to this the data that 78% of pirates are library card holders (a greater percentage than the general survey population—75%) and one of the reasons that people pirate books becomes clear: when legitimate means of obtaining books are inaccessible to them.

Examining the cross-section of book pirates specifically, the top three things that book pirates are most likely to do when a book is unavailable from the library is buy it from an online bookstore (39% of book pirates) put themselves on the hold list (28.9% of book pirates) and find it for free to download (27.1% of book pirates) This is a large increase for finding books for free compared to the general survey population (27.1% compared to 15.5%).

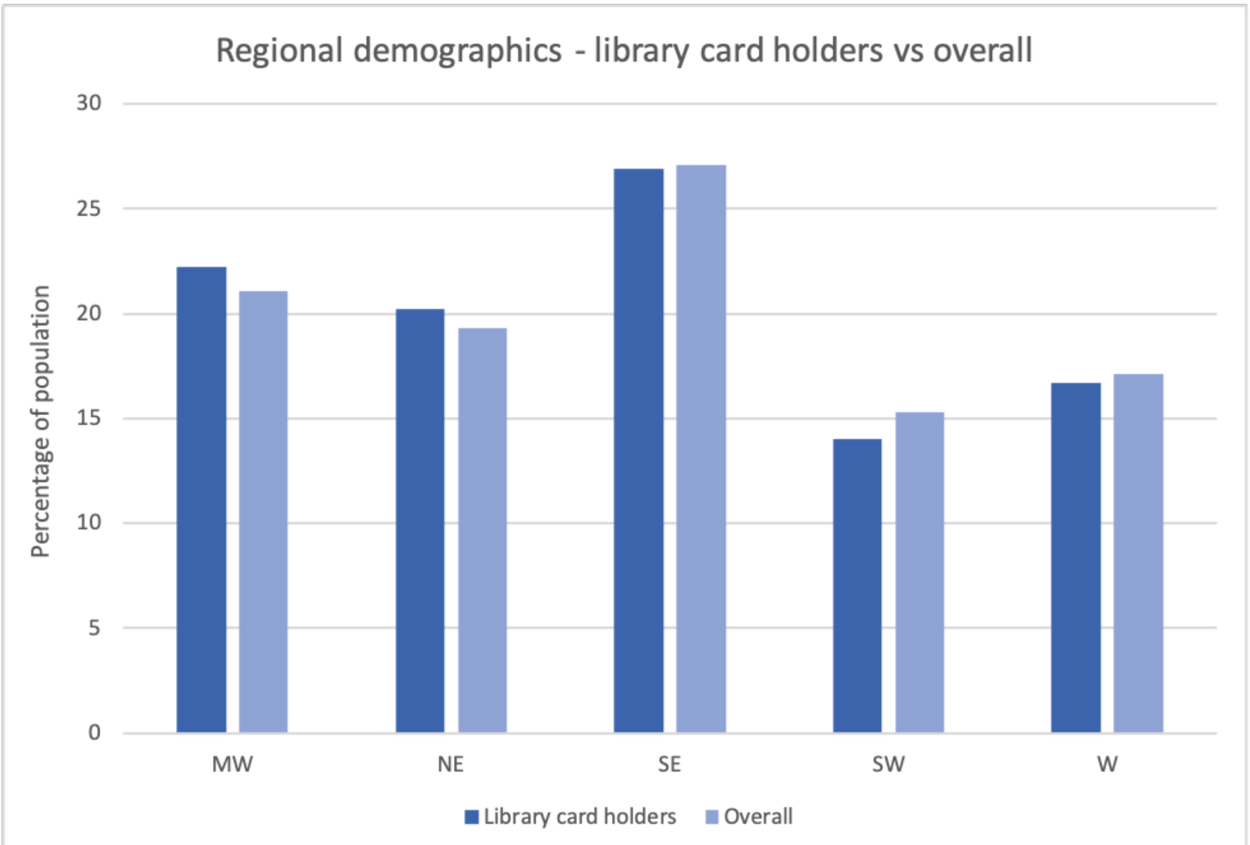
Library Patrons



Library card holders are 75.8% of the survey respondents; the largest generational group is baby boomers (76.4% had a library card), then Gen X (75.5%), and millennials (70.5%). This is consistent with the findings of [Library Journal's recent generational library patron survey][5] which also found that the older age groups were the ones with the highest percentages of library card holders. Even though millennials had the lowest percentage of library card holders of the three age groups, they had a higher percentage of respondents who were borrowing more from the library during COVID (in all formats) than the other

[5] https://www.libraryjournal.com/?detailStory=Reading-Through-the-Ages-Generational-Reading-Survey

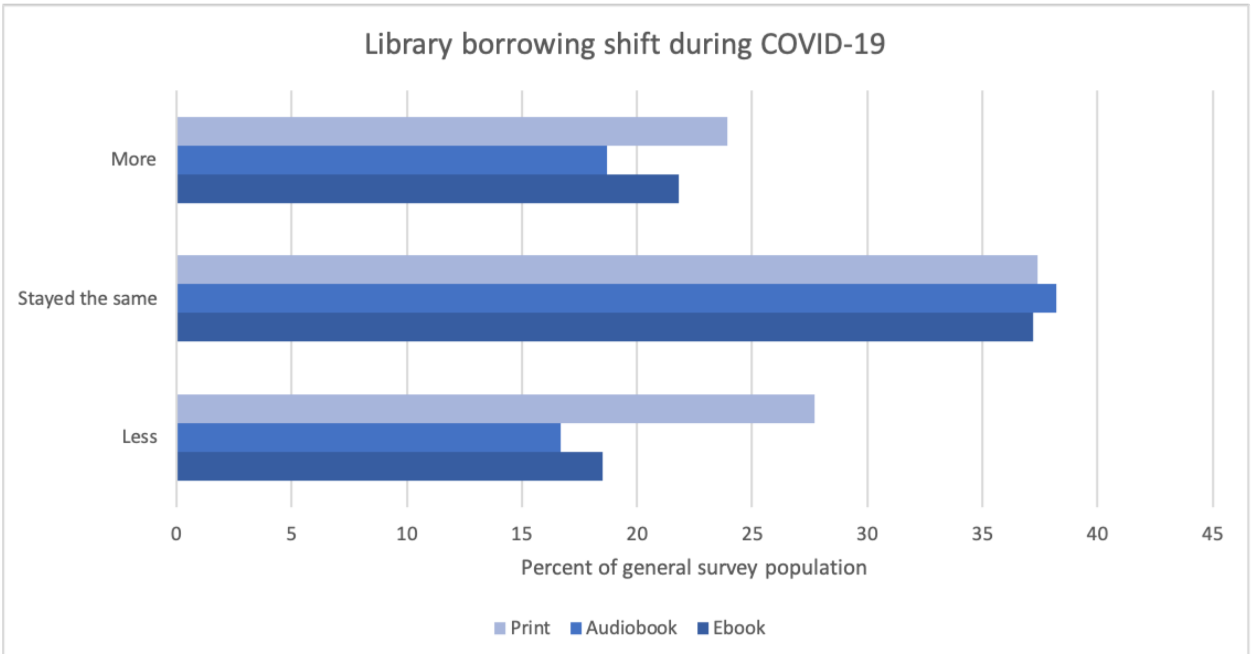
age groups. Library card holders were more European American or white (68%) and Asian or Asian American (6.1%) than the general survey. More of them are from the Midwest (22.2%) and fewer from the Southwest (14%).



Library card holders were more likely to discover books through recommendations from librarians (5.1%), browsing shelves in public libraries (15.7%), browsing online library catalogs (6.9%), and in-person author events (14.4%) than the general survey population. Library card holders had a larger percentage of respondents buying more ebooks (24.2%), audiobooks (18.3%), and print books (28.1%) during COVID than the general survey population. This, again, supports what the data from the general survey population showed: library use need not be at odds with book buying.

31.6% of library card holders said they would wait a few weeks in the hold line for a book, 24.9% said a few days, and 22.9% said they would wait until the book was available. Most library card holders finish a book before they check out (or buy) a new one: 70.7%. In terms of how library borrowing changed during COVID, print was the top format for those borrowing more during COVID (23.9%), followed by ebooks (21.8%) and audiobooks

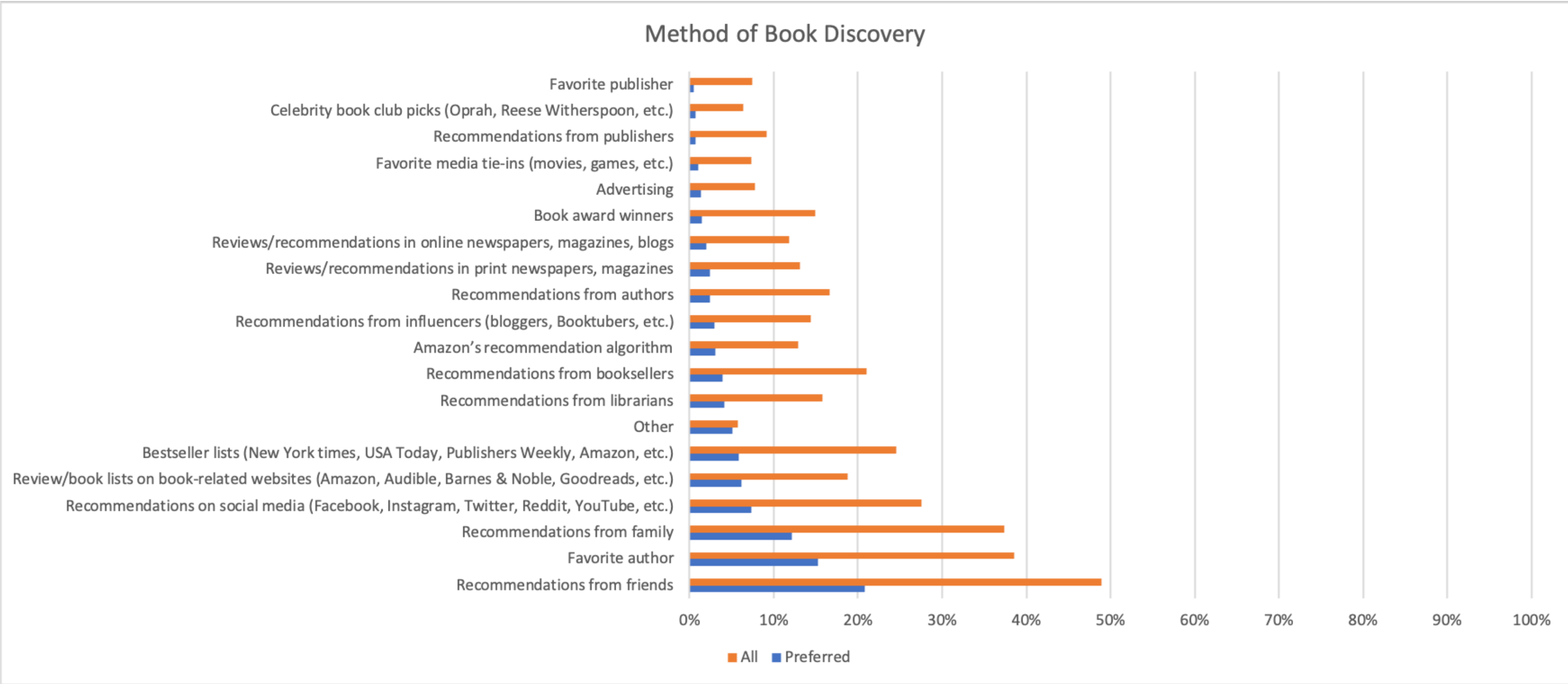
(21.8%). Overall, the largest group of respondents said that their library borrowing stayed the same during COVID.

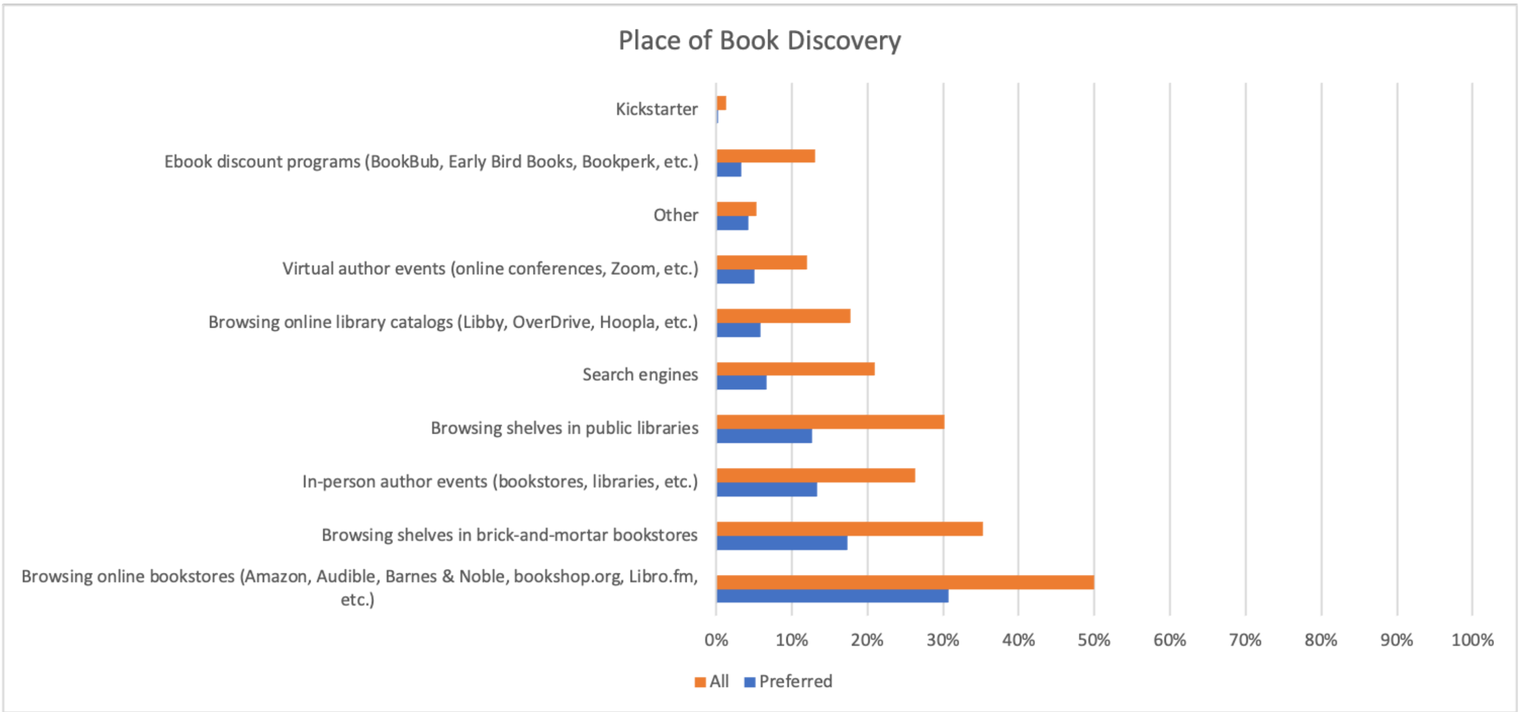


AUTHORS

Discovery

Book discovery data reveals good news for authors: the #2 way people prefer to discover new books is through favorite author and the #3 place people prefer to discover new books is in-person author events. Author is also the #2 most important factor for people in buying a book. In other words, the author is consistently an important discovery tool and purchasing factor for readers and book buyers. The top three ways that people discover books are through recommendations from friends (20.8%), favorite author (15.3%), and recommendations from family (12.1%). Therefore, building a strong author brand is essential for book visibility, given how highly respondents rank it in their book discovery process. However, only 2.4% said they preferred to discover new books from recommendations from authors. This indicates that book engagers are reading more books by authors that they've enjoyed in the past, but are not necessarily listening to recommendations of other books from those same authors.

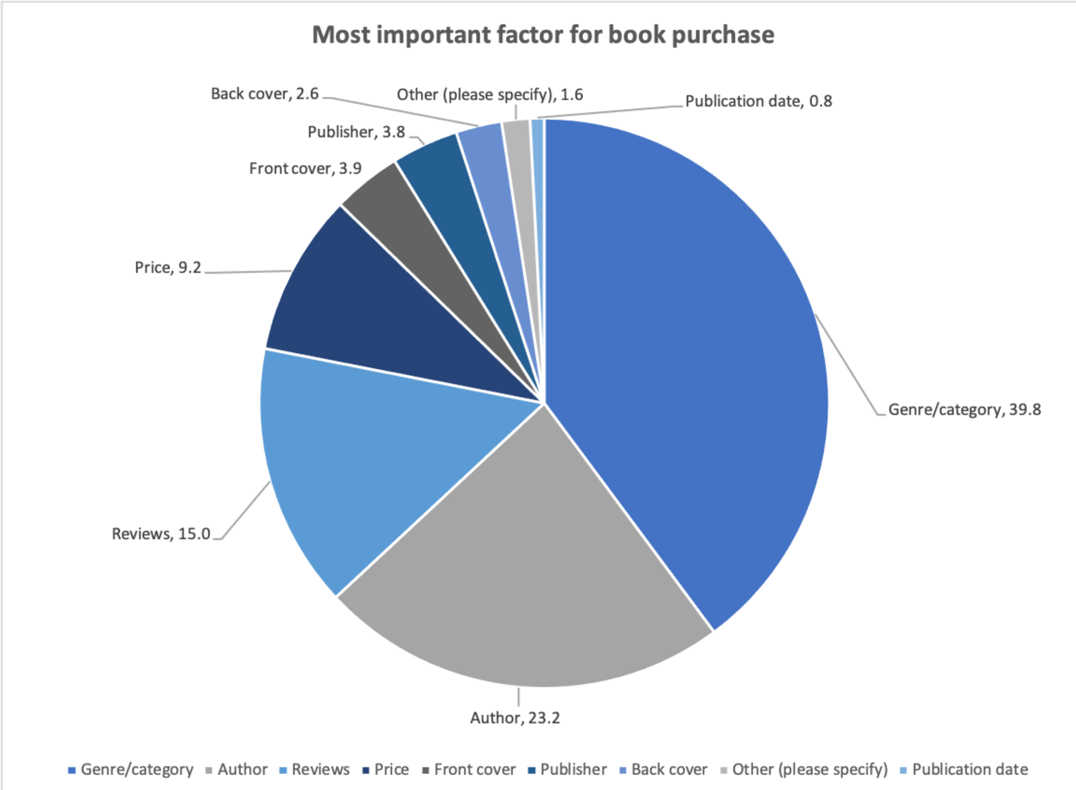




The top three places where people discover books are browsing online bookstores (30.7%), browsing brick-and-mortar bookstores (17.4%), and in-person author events (13.3%). Virtual author events were much lower on the list (5%) and pose an area for improved work and engagement from authors, particularly during COVID when in-person author events are not possible. Given that browsing online and brick-and-mortar bookstores is a top contributor to book discovery, authors would be wise to work with bookstores (and libraries) to maximize audience reach.

In considering the demographics of readers, the data highlight that the most avid book engagers (4+ books a month) are Black and Latinx and are younger than the general U.S. population (particularly heavier in the 18-34 age range). Those who avidly engage with books also avidly engage with other forms of media, particularly games. Men and non-binary book engagers are often overlooked as target consumers. However, the data shows that men prefer in-person author events (15.8%) and virtual author events (6.1%) for places of discovery at a greater percentage than the general survey population.

The top three most important factors for buying a book are genre/category (39.8%), author (23.2%), and reviews (15%). Genre metadata (such as BISAC codes or Amazon Kindle categories) is crucial for ensuring that a book is categorized within the intended genre, especially given how important genre is to book buying decisions for readers. Additionally, reviews are still vital in purchasing decisions. It is worth noting that the author was more important in the book buying decision for men (27.2%) than women. In terms of book discovery, women slightly preferred favorite author as a preferred discovery tool (16.4%) compared to men.



Genres

Genre is the #1 factor book buyers consider in their decisions to purchase books. The survey asked about genre engagement within adult fiction, adult nonfiction, young adult fiction, young adult nonfiction, and children's. Here are the top genres in those areas (with percentages of respondents):

Adult fiction (71.5%)

1. Mystery (42.2%)
2. Thriller (32.6%)
3. Classics (27%)
4. Romance (26.8%)
5. Historical fiction (26.3%)

Adult nonfiction (55.6%)

1. Biographies and autobiographies (30.9%)
2. History (28.3%)
3. Body, mind, spirit (30.9%)
4. Spiritual (16%)
5. True crime (15.7%)

YA fiction (26.2%)

1. Fantasy (14.8%)
2. Mystery (12.3%)
3. Romance (10.7%)
4. Science fiction (9.1%)
5. Comics, graphic novels, manga (8.9%)

YA nonfiction (11.2%)

1. Biographies and autobiographies (4.5%)
2. History (4.4%)
3. Body, mind, spirit (4.3%)
4. Comics, graphic novels, manga (3.7%)
5. Crafts and hobbies (3.6%)

Children's (11.1%)

1. Picture books (6.6%)
2. Activity books (6.1%)
3. Traditional literature (5.9%)
4. Fantasy (3.7%)

5. Informational (3.2%)

Genre fiction (especially mystery, thriller, fantasy, romance, and science fiction) dominate the fiction categories for both adult and YA. Given that 82.9% of respondents engage with books for entertainment or leisure, the escapism of genre fiction is a perfect outlet for that, especially during the pandemic when escapism from day-to-day realities becomes an ever more important purpose of books. For example, united sales of romance ebooks were up 17% through May of 2020 because of the impact of COVID-19 lockdowns. History and biographies/autobiographies monopolized the nonfiction categories, but body/mind/spirit and related spiritual categories were also prominent. True crime remains a strong trend too. Comics, graphic novels, and manga are not genres but as a particular format and category, they are present in top YA categories (both fiction and nonfiction) but not adult, which illustrates the way that the YA comics/graphic novels/manga scene has been thriving of late.

Avid book engagers (those who read 4+ books per year) in general consumed the same top genres as the general survey population, with a few exceptions (see list below). Avid readers had romance higher on the adult fiction list and fantasy made the adult fiction list too. Avid book engagers did not have true crime in the adult nonfiction categories but cookbooks appeared. Cookbooks are not often read completely from cover to cover, especially in one sitting, which may contribute to why avid book engagers can engage with so many of them (and why cookbooks would be at the top for avid book engagers but not the general survey population). Horror and classics replace science fiction and comics/graphic novels/manga in YA fiction. The addition of classics here may be related to the availability of free public domain books in ebook or audiobook form; for avid book engagers who are consuming book after book in rapid succession, public domain books offer a free and vast book repository. Finally, body/mind/spirit was higher on the list for YA nonfiction, and children's included comics/graphic novels/manga.

Top Genres for Avid Book Engagers (percentage of respondents)

Adult fiction (72.8%)

1. Mystery (43.3%)
2. Thriller (33.9%)
3. Romance (31.5%)
4. Fantasy (30.5%)

5. Classics (30.5%)

Adult nonfiction (52.1%)

1. Biographies and autobiographies (28.2%)
2. History (27.2%)
3. Body, mind, spirit (19.8%)
4. Cookbooks (16.9%)
5. Spiritual (16.4%)

YA fiction (33%)

1. Fantasy (19%)
2. Mystery (15.2%)
3. Romance (14.2%)
4. Horror (12.1%)
5. Classics (11.8%)

YA nonfiction (14.4%)

1. Biographies and autobiographies (6.2%)
2. Body, mind, spirit (6.1%)
3. History (6%)
4. Comics, graphic novels, manga (5%)
5. Crafts and hobbies (5%)

Children's (13.1%)

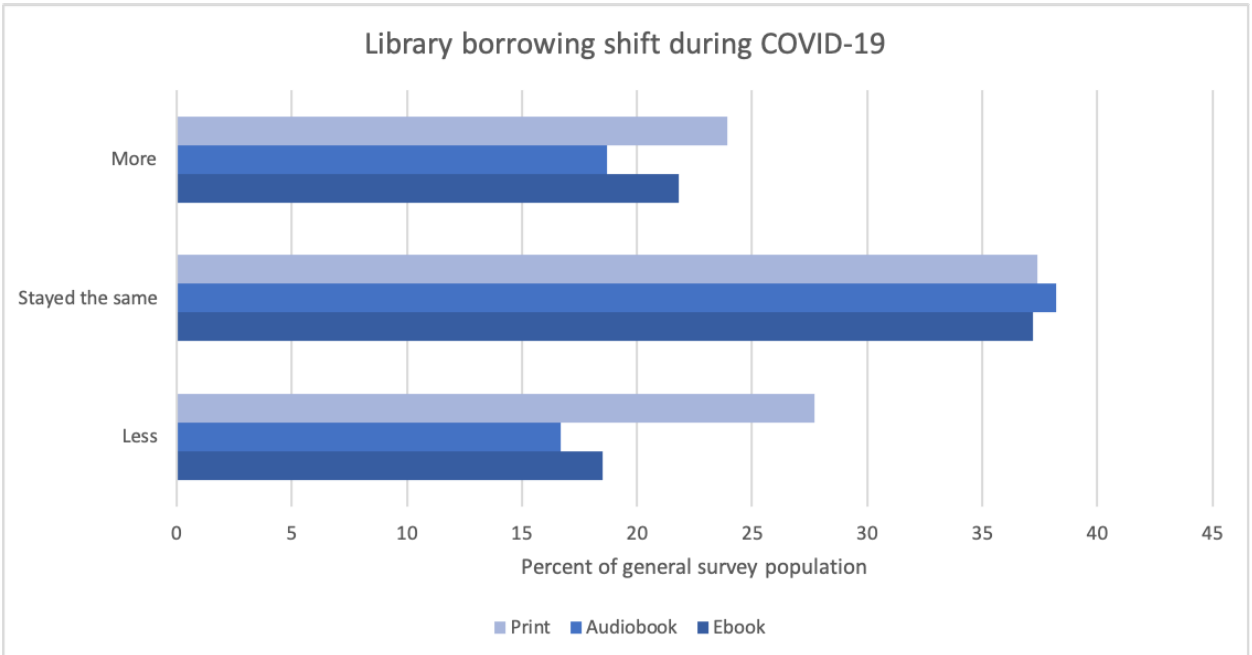
1. Picture books (7.8%)

2. Activity books (7.2%)
3. Traditional literature (6.7%)
4. Fantasy (4.7%)
5. Comics, graphic novels, manga (4%)

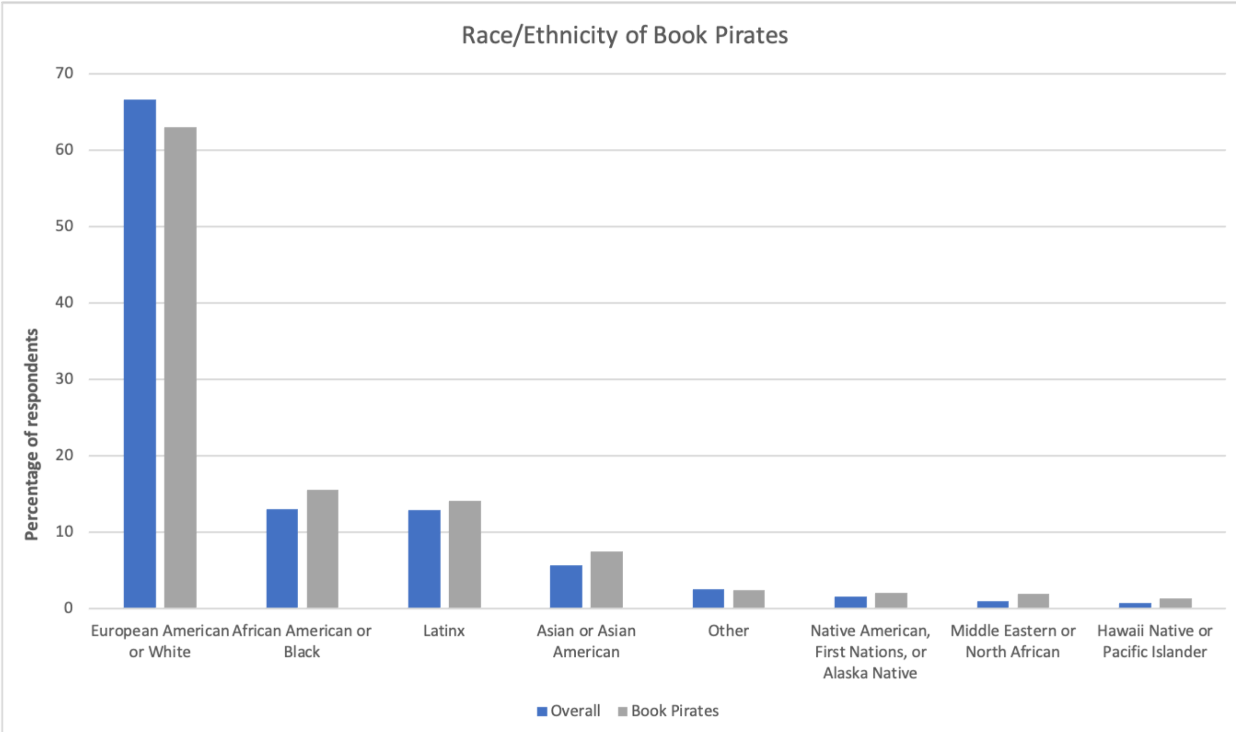
Authors and Piracy

14.4% of survey respondents engage in book piracy (6.9% of responses to the question about which ways they engage with books out of 11 options). Book pirating is defined as reading and/or downloading books that typically cost money (not public domain) from a website where other readers have posted copies for free. While piracy is a hugely problematic practice that deprives authors of income, the survey data illustrates that book pirates are also your customers. One way to combat piracy is to better understand book pirates and work to meet their needs another way. So who are book pirates?

Book pirates are also book buyers, book subscribers, and book borrowers. Compared to the general survey population, a higher percentage of book pirates are *buying* more ebooks (38.7%), audiobooks (27.1%) and print books (33.7%) during COVID than the general survey population. A higher percentage of book pirates are also *borrowing* more ebooks (30.1%), audiobooks (31.6%), and print books (28.5%) during COVID. In fact, book pirates had a larger percentage of library card holders: 78% (compared to 75% for the general survey population).



If book pirates are already buying and borrowing books, why are they pirating? Accessibility plays a part here, as data about libraries illustrates. When a book is unavailable at the library, library patrons have the ability to do a variety of things, including put themselves on the hold list or buy the book at a local bookstore. 15.5% of survey respondents (20.4% of library card holders) pirate when the book is unavailable through the library in the desired format. This is a small increase from the 14.4% of respondents who pirate books. For book pirates, the percentage is even higher: 27.1% of book pirates turn to piracy because a book is unavailable at their public library.



In terms of demographics, book pirates are younger and composed of greater percentages of men and BIPOC people than the general survey population. Book pirates are more likely to post a book review on social media (59.9%) and to buy books in multiple formats (41.5%) than the general survey population. The picture that the data shows of book pirates demonstrates that they are avid and engaged readers. Engaging with books for free (through piracy amongst other methods) is just one of the ways that they engage with books. Therefore, consideration of free engagement that can benefit authors is a good place to start. In the general survey, 17.8% of respondents (8.5% of responses) are reading/downloading free books for marketing promotions, and this is much higher for book pirates (35.3%). Controlling where book pirates are downloading free books allows authors to harness pirate reading activity and have valuable data about these readers: what the market segment is like, where they stop reading, etc.

As book pirates are also avid book engagers and readers, they are invested in storyworlds. This is evident in their engagement with fanfiction. While only 12.2% of the general survey population (5.8% of responses to the question) are reading/downloading fanfiction, the percentage was much higher for book pirates: 27.4%. This again illustrates the high engagement of book pirates that offers an opportunity for those who can get to know these consumers.

VIDEO GAMES, MOVIES AND TV: DISCOVERY AND ENGAGEMENT

How do peoples' media engagement with video games, movies and TV differ from how they engage with books? In what ways are they similar? How do people discover what they want to watch or play, and how is this different from how they discover books?

We begin to answer these questions by noting that games are more complex units of sale than books, movies, or TV. Games that are free to play can be paid for with advertising or a combination of ads and "DLC" (downloadable content). This content can be additional maps or levels to extend gameplay; customizable elements such as "skins" or "emotes" (dances) that the player can use for self-expression or to acquire more health or power in the game; or even in-game concerts from real life DJs and musicians. For example, tens of millions of *Fortnight* players have flocked to the "party royale" island inside the game and paid for access to first-run concerts that are equivalent to stadium rock shows.

Avid book engagers give a particularly illuminating glimpse into millennial cross-media engagement. Those who avidly engage with books are also avidly engaging with other forms of media. Subscriptions to streaming services for books, games, TV/movies, and newspapers/magazines all went up at a higher percentage for avid book engagers during the COVID-19 pandemic than for the general survey population. The characteristics of the cross-section of avid book engagers suggests that rather than one type of media cannibalizing sales and audience for another type, avid media engagers engage avidly across media and one type of media encourages engagement with other forms. Avid book engagers don't choose between books and games or books and TV/movies; they engage with all of these forms in a large, networked media consumption ecosystem.

VIDEO GAMES

Just as there are different formats of books (print, ebooks, audiobooks) there are different formats of games: PC (personal computer), console (such as PlayStation, Xbox, Nintendo Switch), and mobile games played on a tablet or mobile phone (iPhone or Android). Some games are single-player; some are multiplayer. Because games are all digital products made with computer source code and played on one type of computer or another, game discovery happens primarily in digital settings: platforms release games that are playable only on their own computing systems; online vendors like Steam offer games in a variety of formats. Needless to say, "author events," one of the main ways people find books are not a thing in gaming, where large teams of developers make a game.

Across ethnic groups, “gaming platform new releases” was the top driver of game engagement. Regionally, “gaming platform new releases” had the greatest range, meaning that regions differed the most from each other in how much platform new releases impacted peoples’ video game engagement. The Midwest was a low outlier for gaming platform new releases and gaming platform sales, suggesting that more gaming in the Midwest happens on PCs and less happens on expensive consoles. The Midwest was a high outlier for the influence of category/lists on gaming platforms, app store new releases, app store sales, and public library recommendations--data that reinforce that in the Midwest, more gaming is happening on PCs or iPhones, devices that are not solely devoted to gaming. Additional findings:

- The West is the highest region for discovery through recommendations from friends (26% compared to 21.7% in the general survey population), but the lowest region for discovery through recommendations from family (10.8% compared to 14.6% in the general survey population) and Facebook streamers (1.8% compared to 6.6% in the general survey population)
- The Midwest is the highest region for discovery through recommendations from family (18.1% compared to 14.6% in the general survey population)
- The Southeast is the highest region for discovery through recommendations on social media (15.5% compared to 13.3% in the general survey population)
- The Northeast is the highest region for discovery through YouTube streamers (10% compared to 7.5% in the general survey population)

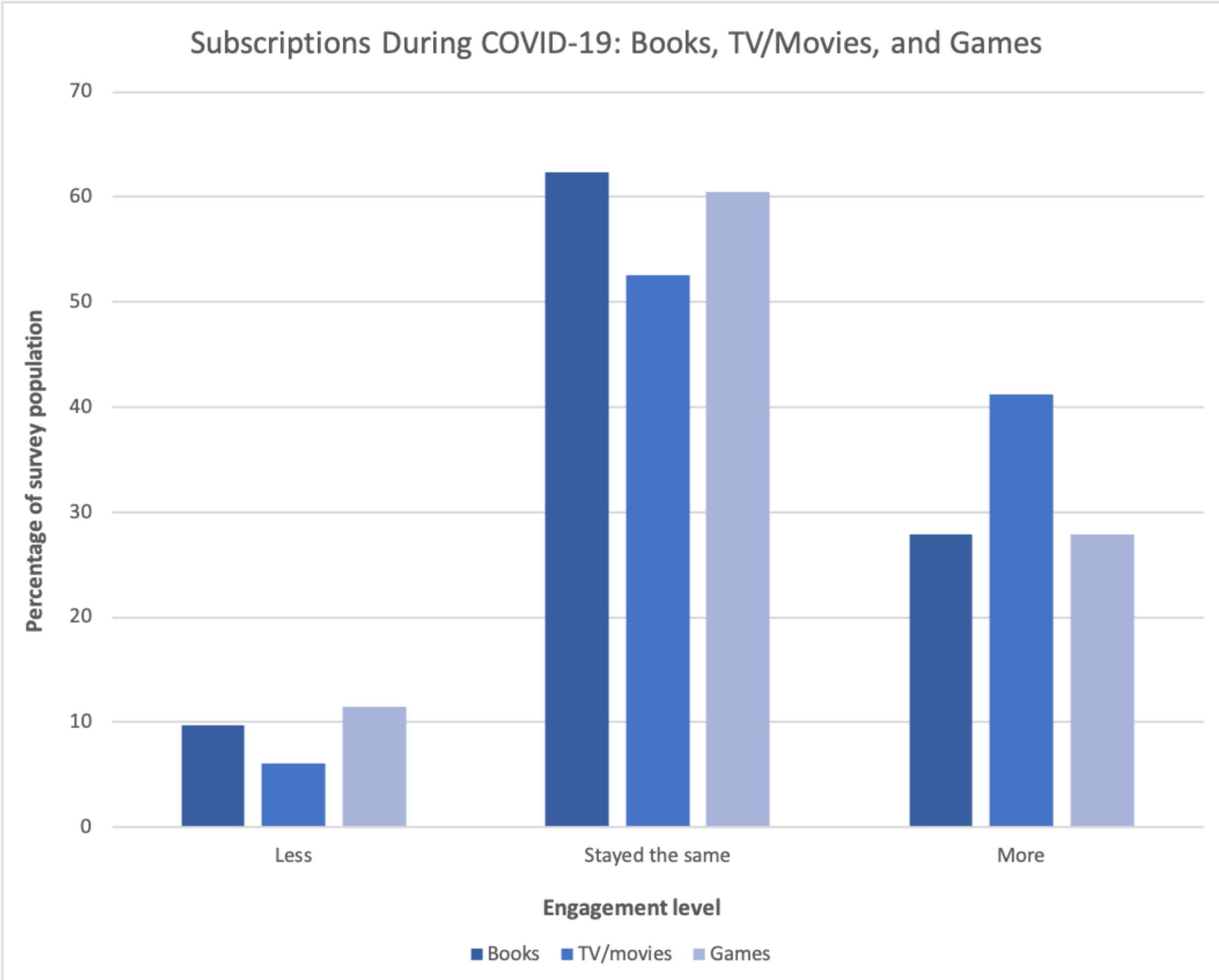
The range of recommendation influences says a lot about how gaming culture varies regionally—for example, the contrast between “family” being low for recommendations in the West, but high in the Midwest. Generational divides are more pronounced in game recommendations. Across every ethnicity we surveyed, recommendations from family rank low:

- Blacks (11.2% compared to 14.6% of general survey population)
- Asians and Asian Americans (9% compared to 14.6%)
- Hawaii natives (6.9% compared to 14.6%)
- Latinx (12.4% compared to 14.6%)
- Middle Eastern or North African (10% compared to 14.6%)
- Native American family (10.9% compared to 14.6%)

- European American or white (16.3% compared to 14.6%)

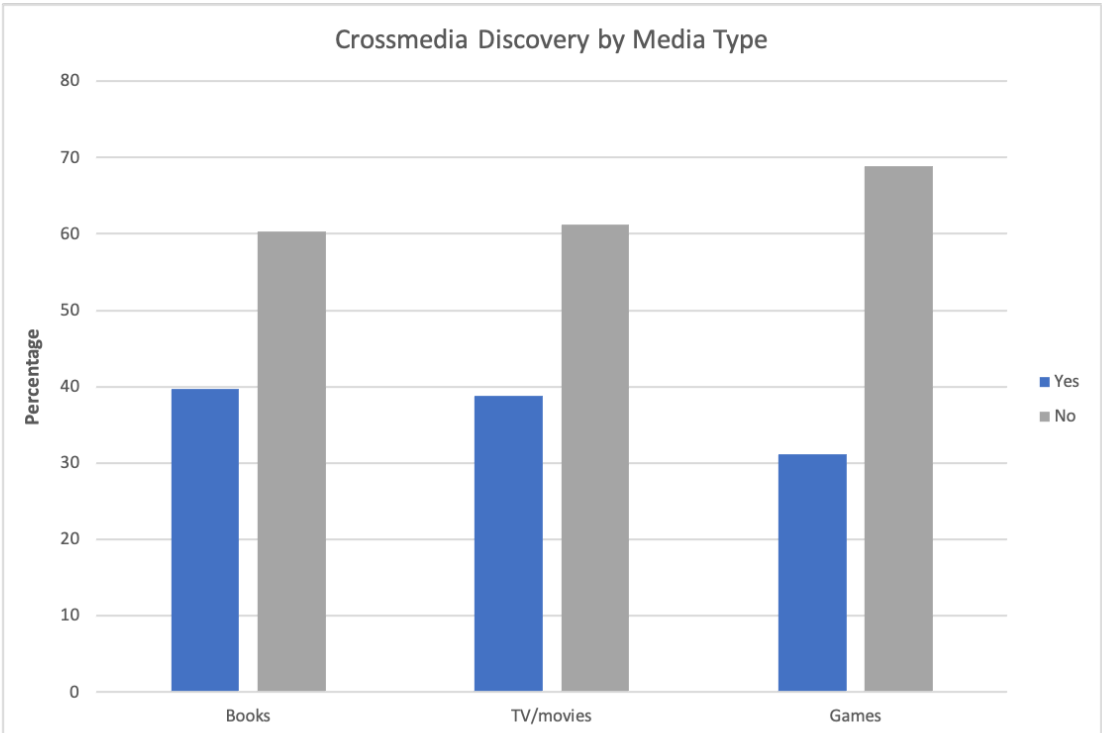
Game Industry

- Top three game genres: puzzle games (35.9% of respondents or 13.7% of responses), casual games (31.9% of respondents or 12.2% of responses), and action-adventure games (30.8% of respondents or 11.8% of responses).
    - “Casual games” are often played on mobile devices, such as *Stardew Valley* or *Kandy Krush*. 37% of women engage with casual games, while only 25.9% of men do.
    - Action-adventure games are highest ranking with men, both in single-player and multiplayer formats.
- 41.7% of the general survey population prefer single-player games; 10.9% prefer multiplayer games; 8.18% prefer multiplayer local co-operative games.
- Pirating games accounts for 11.4% of respondents or 7.9% of responses (downloading games that typically cost money from a website where people have posted copies for free)
    - Note: our data don’t capture the pirating behavior of using someone else’s login credentials



Cross-media engagement

- Cross-media engagement
    - Respondents are finding games through books and TV/movies:
        - 60.3% engaging with a book led to finding a new movie, TV series, or game
        - 61.2% engaging with a TV series or movie led to discovery of a new book or game
- 13.3% discovered games through recommendations on social media
- 28.8% post game reviews or recommendations to websites/social media



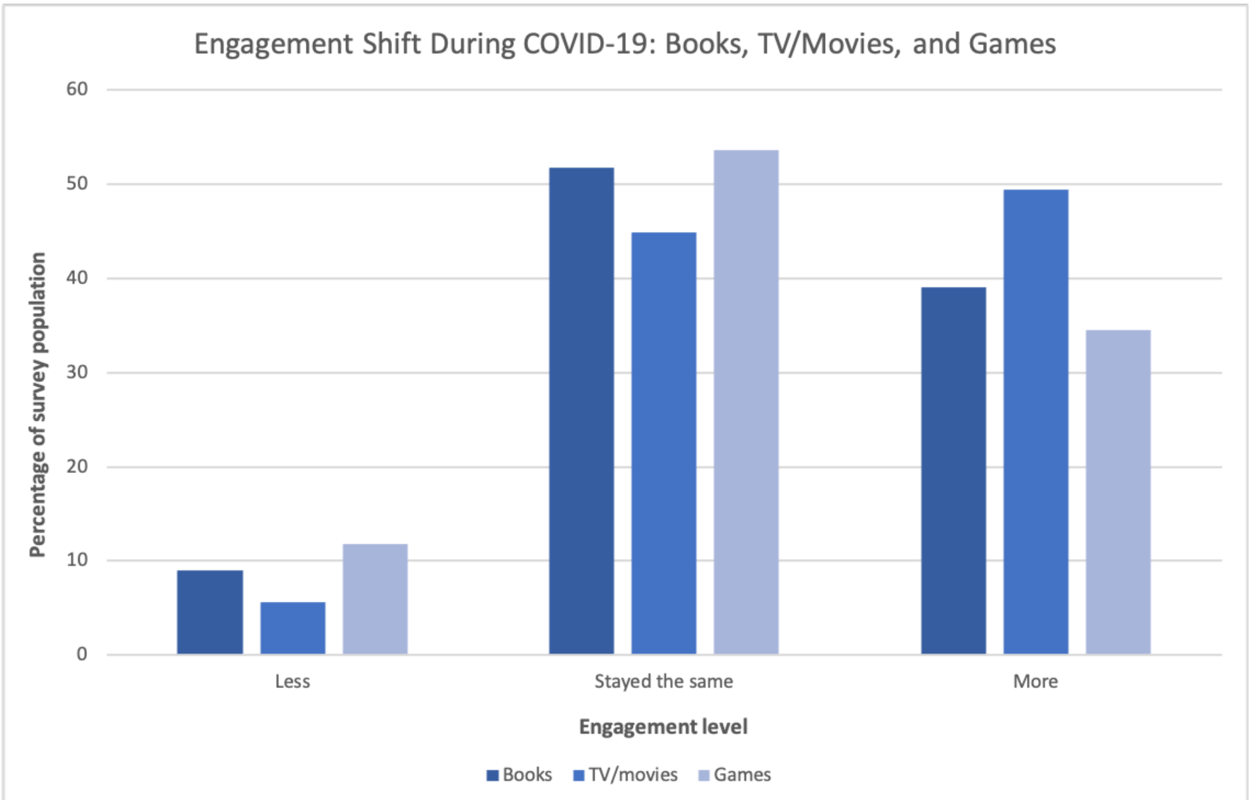
MOVIE/TV INDUSTRIES

Streaming services such as Netflix, Hulu, and Amazon Prime transformed the cable industry; COVID has transformed theatrical distribution, shutting theaters during the pandemic and prompting Warner Brothers Studio to announce that it would launch its entire slate of 2021 movies same-day on streaming and in theaters—a move the *Hollywood Reporter* speculates won't be revoked after the pandemic is over.[6]

With movie theaters shut, the pandemic has flattened the difference between movies and TV. At home, even first-run movies are TV now. Across all ethnicities, ages and regions, TV and movie consumption increased during the pandemic. People are hunkered down hunting for ways to pass the time in social isolation.

- TV/movie subscriptions rose at the same rate as game subscriptions during COVID. Both increased substantially.
- TV/movie engagement during COVID increased the most of all the media options

[6]https://www.hollywoodreporter.com/news/warner-bros-smashes-box-office-windows-will-send-2021-slate-to-hbo-max-and-theaters



What is the effect on books of TV and movies being accessed almost entirely through either streaming or cable subscription services? On-demand access to an entire archive, which the consumer experiences as "free" because the cost of sampling is rolled into the subscription fee, makes the experience of buying a book seem comparatively risky. A person buys a book without being able to sample it entirely, but on streaming services the consumer can flit show to show cost-free. This is why book genre is far and away the most important factor (39.9%) in book selection, but not necessarily in TV and movies. In TV and movies, viewer preference is split among streaming platform recommendations, streaming platform new releases, cable recommendations, cable genre category lists, friends, family and social media. The scattershot of TV/movie recommendation influencers reflects the consumers' perception that there's no cost risk in sampling.

As we have suggested elsewhere in this report, book pirate behavior should be reviewed with fresh eyes. While we deplore that pirates deprive authors, publishers and booksellers of money, we also believe that pirate behavior is likely to be less and less outlier behavior in the future than it is right now. For children, who are not part of this survey, the distinction between paid and free content may not even be obvious. It will be harder to convince a generation of young consumers raised entirely on leased access to streaming content to buy books.

Immersive Media data demonstrate that people *like* to own books. A high portion of pirates buy books in multiple formats, for example. People buy printed books for all sorts of reasons: as gifts to exchange; as items that declare their identity on a shelf in home or office decoration; as respite from "always on" digital culture. We doubt that temporary, leased access would cannibalize the book selling market. On the contrary, as we have seen in the case of library books, low- or no-cost temporary access is an excellent discovery tool that expands market growth by de-risking product sampling.

Millennials are the bellwether for leased, temporary access to books which they may well then purchase in printed form. Millennials have the greatest cross-media discovery of all the age groups. They are avid book engagers who also consume TV, movies, and games with gusto. They are multitaskers whose media habits are "snacky," ranking above the general survey population for multitasking in all book formats, TV, movies and games.

CONCLUSIONS

The Immersive Media and Books 2020 study sheds light on behaviors of book engagers in all of their media consumption, including film/TV and video games. The project was conceived pre-pandemic by Panorama Project and researchers at Portland State University to track the role of books in the entertainment media ecosystem. We have found that the silos between media, and between parts of the publishing industry, are porous. Millennials in particular move quickly between and across media; they "snack" and "binge" more than GenX and baby boomers. Public libraries are agents of book discovery, consumption and purchase. Publishers and booksellers benefit from readers' free exposure to their products. With a confidence rate of 98.5% accuracy, this study sheds light on book buying, borrowing, discovery and consumption before and during the pandemic.

Word-of-mouth recommendations remain very influential book buying and borrowing. This study has granular information disclosing where and how people of various ages, races/ethnicities, and geographic regions become aware of books and engage with them. Especially for younger people, the intimacy of "friends" and "family," the top two recommendation sources, are interwoven with "influencers" and other social media celebrities that people get to know intimately as they "follow" them over time.

OVERALL

The following conclusion are big-picture observations that apply to various book publishing and media stakeholders.

- **Books are one part of a media entertainment ecosystem.** To focus only on book reading is to miss other ways people engage with books.
    - We captured behavior of people who "engaged" (rather than "read") at least one book during the last twelve months; 53% of the general survey population engaged four or more books each month.
    - In asking the same set of engagement questions about books, TV/movies and video games, we aimed to capture both shared features of media engagement, what's unique about book engagement in 2020.
    - Engagement with longform narrative—the time investment of reading a book or playing a video game on console or desktop—continues to draw a lot of participation. However, our data indicates attentional flows that vary from "snacking" to "bingeing."
- **Avid book engagers consume more TV, movies and video games than the general survey population.** The book industry's best customers passionately consume across media.
    - "Avid" is 4+ books/month, in any format.
    - About 53% of survey respondents were "avid" book engagers. The same people were also avid video gamers and avid TV/movie watchers.
- **Millennial book engagers, particularly Black and Latinx, are the category to watch.** They proportionally out-consume other age- and race-demographics.

- **Genre is the most important consideration factor** when people are deciding whether or not to engage with a book.
    - Genre was even more important to the youngest of our survey respondents, millennials (25-34) and Gen Z (18-24).
- **People are largely unaware of how much metadata influences their book consumer behavior**. 30% of respondents said browsing online is their preferred way to discover books, but only 3% said recommendation algorithms are their preferred way to find books.

- **Book pirate behavior warrants further study.**

- Pirates prefer to find books legitimately at a library.
- Pirates justify stealing a book if they can't get access at the library. This is the truest for Gen Z patrons (18-24).
- **During pandemic, pirates increased their paid subscriptions to games and newspapers/magazines**. They are also more likely to buy books in multiple formats. These behaviors suggest that pirates will pay for things if the value proposition makes sense to them.
- Pirate behavior captured in this study refers to trade press books. Pirate behavior with self-published books is outside the scope of the Immersive Media 2020 study; see "Limitations" section above for more details.

- **Publishers and libraries: a win/win rather than a zero-sum game.** The book discovery benefit provided by libraries outweighs the possible reduction in sales. Our data show that people who discover books at libraries often go on to purchase those books or other, related ones in bookstores and online.

STAKEHOLDERS

- **Publishers —** It would benefit publishers to meet the needs of Black and Latinx millennials (avid book engagers). Think of libraries as a vital space of discovery and a potential ally in combating piracy. In further efforts to combat piracy and lower purchasing risk for customers, consider 2-hour product samples that would make book purchase less risky to people accustomed to streaming vast libraries or watching game playthroughs before purchase. Despite consumer unawareness of metadata's role in discovery, genre/category (user-friendly metadata) remains the #1 factor of book purchase. Publishers should encode products with nuanced BISAC and other metadata keywording, particularly in products where the genre doesn't signal what readers can expect, such as literary fiction.

- **Libraries —** The survey data shows that libraries are tools of discovery and potential catalysts for book buying. Consider ways to drive library users to bookstores when the book is unavailable from the library, such as a 2-hour ebook/audiobook lending as a sampling strategy. Rethink library organization by media type; consider how to engage with patrons and discovery across media. Recommendations from librarians remain low as a discovery tool for finding new books (only 4.1%) and an opportunity for libraries. Certain groups have lower percentages of library card holders, particularly millennials (lowest age group) and

Latinx (lowest racial group). Considering the needs of these groups will help public libraries reach their communities better.

- **Booksellers —** Brick-and-mortar bookstores are not just showrooms for Amazon, which has been a popular belief in the industry, but Amazon is also a showroom for brick-and-mortar bookstores. In this study, 44% of respondents bought a book in a bookstore that they first found online (on Amazon and other sites). There is an opportunity for further connection and relationship between booksellers and libraries, given that 30% of respondents buy the book from a bookstore (online or brick-and-mortar) when it is unavailable from the library. 31% of respondents eventually buy books in bookstores that they first discovered in libraries. There are large regional differences in discovery and behavior that booksellers should take into consideration. Booksellers should consider better ways to promote cross-media discovery for book buyers. Finally, there is an opportunity to increase discovery through bookseller recommendations, which were very low (3.9%).

- **Authors —** Piracy is a hugely problematic practice that deprives authors of income, this study found that book pirates are also avid book engagers and readers. Book pirates buy, subscribe to, and borrow books at higher rates than the general survey population. To combat piracy, authors should get to know book pirates as customers, engage in sampling efforts and strategic giveaways to gather valuable data about their readers and reading activity.

  Book engagers are also engaging with other media, so authors should consider cross-media discovery and rights opportunities for licensing book content in other media. In terms of discovery, continue to engage with in-person and virtual author events at libraries—these are some of the primary places that people discover new books. Genre remains the most important factor for book purchasing, followed by author.

GLOSSARY

5G connectivity: 5th generation broadband cellular networks

Avid book engagers: for the purposes of this study, people who "engaged" with 4 or more books per month, in any combination of formats (printed, ebook, audiobook). "Avid book engagers" were 53% of the general survey population.

BIPOC: Black, Indigenous, and People of Color.

BISAC codes: Publishing industry standard for classifying book subjects and themes. BISAC codes were originally invented to advise booksellers where to shelve books. BISAC codes can be applied to further specify a theme, such as "FIC022130 FICTION / Mystery & Detective / Cozy / Culinary."

Book engagement: for the purposes of this study, book engagement was defined as "buying, borrowing, subscribing to, reading or gifting a printed book, an ebook, or audiobook in part or in whole."

Book piracy: reading and/or downloading books that typically cost money (not public domain) from a website where other readers have posted copies for free

Frontlist/backlist: Frontlist books are new releases in the first three months of their market availability. Books move to backlist after the three-month window shuts, and they are no longer considered "new releases."

Generational classifications follow conventional age demographics. The only generation specified by the U.S. census is baby boomers, born in the era immediately post-WWII.

- Millennials 18-34
    - GenZ is folded into the younger part of our millennial category, 18-24. The age minimum for survey participation was 18.
- GenX 35-54
- Baby boomers 55+

ISBN: International Standard Book Number, a unique commercial book identifier.

Latinx: An umbrella term encompassing Latino, Latina, and Latinx, which can represent gender non-conforming people, and also all three bundled together.

Midlist/bestsellers: Midlist books are not bestsellers, but are likely to "earn out" the cost of their production. Bestsellers are books for which consumer demand is very strong during after it's release, the "frontlist" period. Usually, bestsellers earn more (sometimes significantly more) than the cost of producing them. Bestsellers are also listed on bestseller lists, such as that of the *New York Times*, *Publisher's Weekly*, Amazon, etc.

Midwest: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin

Northeast: Connecticut, Delaware, District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont

Screening Question: for the purposes of this study, participants had to have "engaged" with one book within the previous twelve months. Survey respondents who answered "no" to the question, "have you engaged with a book in the previous twelve months" did not advance beyond the first question of the survey

Shelftalker: A typed or handwritten book recommendation taped to a shelf where the book is displayed at a brick-and-mortar bookstore.

Southeast: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Puerto Rico, South Carolina, Tennessee, Virginia, West Virginia

Southwest: Arizona, Colorado, Nevada, New Mexico, Oklahoma, Texas, Utah

West: Alaska, California, Hawaii, Idaho, Montana, Oregon, Washington, Wyoming

YA: Young Adult (age 12 and up) fiction and nonfiction.

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ABOUT PANORAMA PROJECT

The Panorama Project is a cross-industry, data-informed research initiative focused on understanding the impact of library holdings on book discovery, author brand development, and sales. It is guided by an Advisory Council including representatives from Penguin Random House, Sourcebooks, Open Road Media, American Library Association, Audio Publishers Association, NISO, Rakuten OverDrive, and Ingram Content Group. Initial funding is being provided by OverDrive, Inc.

Daniel Albohn is Project Lead for the Panorama Project. Previously, he worked for eighteen years at Sony where he led Global Business Development and established, launched and championed the innovative new product category of writable, paper-like reading devices including Sony's Reader and Digital Paper. During the course of his career, Dan has held roles in product and marketing management, business operations, media relations and sales, having thrived in both the start-up environment and the larger established organization. He takes a grassroots approach and has a history of developing and nurturing strong relationships across the globe, working with diverse constituencies to identify and pursue common goals. For more information, visit panoramaproject.org.

