Sisters in Crime

"SinC into a good mystery."

Bowker
pubtrack™

2010

The Mystery Book Consumer in the Digital Age

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WHO WE ARE

Sisters in Crime

"SinC into a good mystery."

Sisters in Crime (SinC) is an international organization founded in 1986 to promote the professional development and advancement of women crime writers.

Today, the organization is made up of 3,200 members in 48 chapters worldwide which include authors, readers, publishers, agents, booksellers, librarians, and others who love mysteries.

In an era when authors are increasingly called upon to promote their own books, Sisters in Crime commissioned this study to help members make educated business decisions. We wanted to learn what self-promotional efforts really result in book sales.

Sisters in Crime is online at www.sistersincrime.org

pubtrack™ Consumer

Bowker PubTrack Consumer:

As the exclusive U.S. ISBN and SAN Agency, Bowker® receives the most authoritative title and publisher information available, making it the world's leading source for bibliographic information.

PubTrack is a division of Bowker that specializes in providing business intelligence to publishers, retailers, and authors.

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Introduction:

Bowker's PubTrack Book Consumer research service and Sisters in Crime are pleased to announce the results of collaborative study to look at the mystery book buyer. This report is meant to provide an overview of the mystery book buying landscape, with data and graphics on who buys books, what they buy, where they buy them, and why. This data can provide the catalyst for digging deeper into the information, using tools such as Real Time Reporting (RTR) and INsight, to answer your unique questions about US book consumers[1]. The study was undertaken in the form of quantitative on-line research among a sample of American book buyers who bought at least one mystery fiction title in 2009 and/or 2010.

What we did:
- The development of survey questions was done in collaboration with Sisters In Crime.
  - We used PubTrack™ Consumer's monthly panel of U.S. book buying men, women and teens, balanced to US Census. Details on our methodology for this tracker can be found in the Appendix.
  - Respondents were drawn from a pool of 75,000 survey respondents who bought a book in 2009 and the first half of 2010.
  - The survey was given to a broad range of mystery readers, not just seriously involved mystery fans.
  - Sisters in Crime provided a supplemental contact list from mystery bookstores.
  - 1,056 responses to the survey were received.
  - The survey was deployed in September 2010.
  - The sample we generated yields statistics that can be deemed significant at a 95% confidence level and error margin of 3%.
  - The resulting sample of 1,056 respondents is distributed as follows:

Type	Number of Respondents	Percent of Total
Avid reader (almost always in process of reading a mystery)	389	37%
Frequent reader (read quite a few mysteries, but not exclusively)	536	51%
Occasional reader (read mysteries on and off, like when on vacation)	131	12%
Male	376	35%
Female	680	64%
30's and under	150	14%
40's	156	15%
50's	250	24%
60's +	500	47%

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[1] Real Time Reporting is an analysis tool that creates frequency distributions and cross-tabulations of the mystery survey data. INsight is a toolset that accesses data from Bowker's PubTrack monthly tracking of US book buyers and aggregates this data into quarterly views.

There are several ways to understand and use the findings, depending on your needs.

a) **The text of this report will provide an overview of some of the key findings that we observed and found most compelling.**
b) **The charts and tables are ways that we have found helpful to illustrate the data, but also serve to let you drill somewhat deeper into the data.**
c) **At the end of each chapter are key highlights from that chapter.**
d) **In addition to this report, we will separately provide a cross-tabulation of the results, along with all open-ended responses, upon request, for a fee.**
e) **To further explore the findings, Sisters in Crime plans to host discussion forums within the organization. Representatives from Bowker, for example, will be our guests on an upcoming Mentor Monday on the SinC members' listserv.**
f) **Finally, for those who want to dig deeper into the data, we will provide, on request and for a fee, access to "Real Time Reporting" (along with a quick tutorial) to allow you to go in and build your own reports and/or filter the data as you need.**

Key Findings from the research include:

Demographics:
- *For all genres, not just mystery, women continue to buy the majority of books, but men's share of books is higher in dollars than in units.*
- *Baby boomers and matures (people over 45) purchase over half of all books bought.*
- *In the "mystery-detective" category, women and older buyers are even more highly represented.*
- *Mystery buyers tend to be*
  - *Mostly female – 7 out of 10 are women*
  - *More mature– nearly 7 out of 10 are over 45*

Retail Channels:
- *Mystery buying is not only about chains or online retailers.*
  - *11% of units are sold through book clubs.*
  - *6% of units are sold through independents.*
- *Mysteries are mainly purchased in stores, followed by borrowing from the library, followed by purchasing online.*
- *47% of books bought by men are purchased in a retail store.*
- *E-books play an increasingly larger role*
  - *7.0% of purchases in Q2 2010, increased from 1.7% in Q2 2009.*
- *Book clubs attract more females than males.*
- *Around 20% of all readers acquire their mysteries at libraries.*
- *Online retailers mostly attract readers under the age of 40.*

- *Only 12% of readers 60 and older bought books from online retailers.*
- *13% of readers 60 and older acquired a mystery through book clubs such as Mystery Guild.*

Marketing and Awareness:
- *Browsing bookshelves is no longer the only way readers become aware of mystery titles.*
- *Book clubs such as Mystery Guild remain one of the top ways readers become aware of mystery titles.*
- *The majority of mystery buyers are over 50 and not as influenced by online marketing methods as readers under 50.*

Mystery Reading Behavior Overall:
- *68% of mysteries are purchased by women.*
- *Over half the mysteries purchased are sold to people over the age of 55.*
- *19% of all readers acquire mysteries at libraries.*
- *11% of all mysteries are sold through book clubs such as Mystery Guild.*
- *39% of all mysteries are purchased in stores.*
- *35% of mysteries are purchased by people who live in the South.*
- *77% of mysteries are purchased by households with no children at home.*
- *48% of mysteries are purchased by readers who live in suburban areas.*
- *E-book sales are growing fast. In 2009, 1.7% of books sold were e-books. In Q2 of 2010, 7% of books sold were e-books.*
- *Readers under 40 look for dark, suspenseful stories.*
- *Readers under 40 don't see mysteries as distinct from other genres as older readers do.*
- *Readers over 60 are more loyal to the author or character than younger readers.*
- *Readers enjoy mysteries to solve the puzzle. They also love surprises, thrills, and suspense.*
- *Name recognition still influences readers to buy popular authors.*
- *Readers are attracted by appealing book covers.*
- *Readers want a preview of story elements before they buy.*

Section 1: Demographic Portraits of the Mystery Book Buyer

Before focusing on the mystery book buyer, it is helpful to see how this genre fits into the larger book buying landscape.

Who Buys Mystery?

The following series of charts, which come from the PubTrack Consumer Monthly book tracker, looks at how the mystery buyer compares to other major genre categories in demographic profile. From this series of charts, we learn that the majority of mystery buyers are female, older than 50, and less likely than buyers of general fiction to have children in the household. Mystery buyers are similar to the overall book buyer in terms of their geographic distribution.

Figure 1. Gender Profile based on Buyers (first half 2010). Note: Fiction refers to all categories of fiction combined.
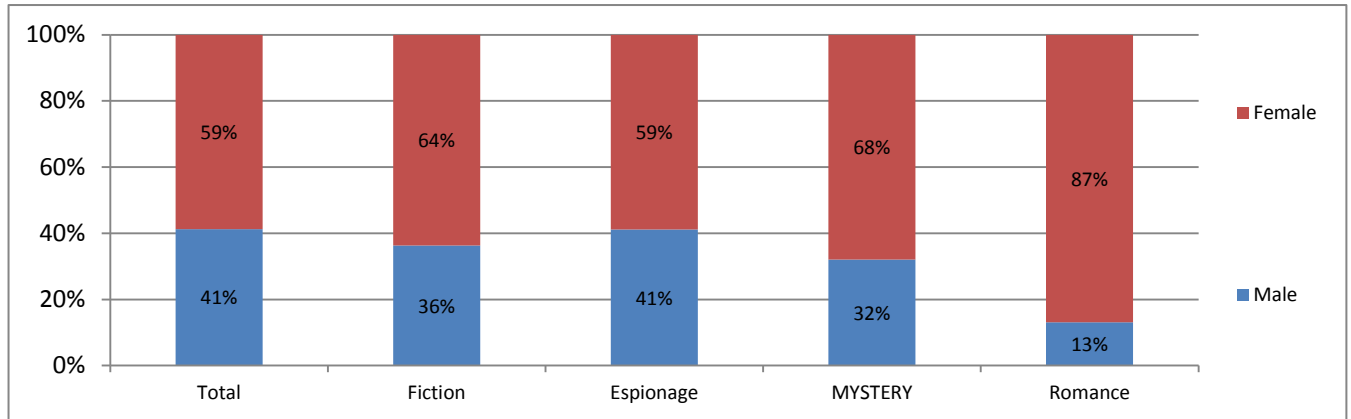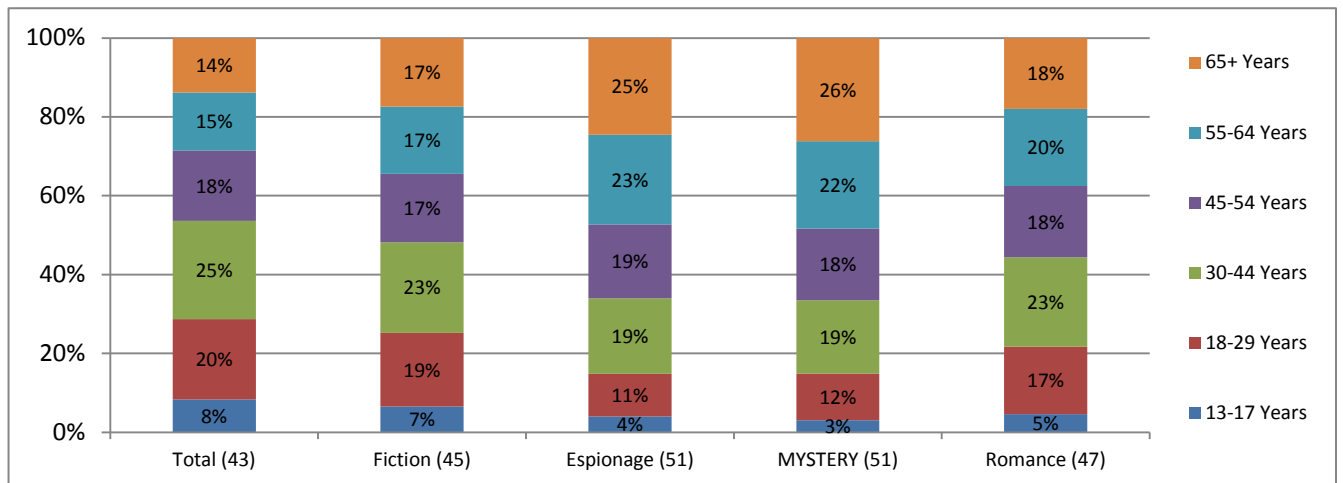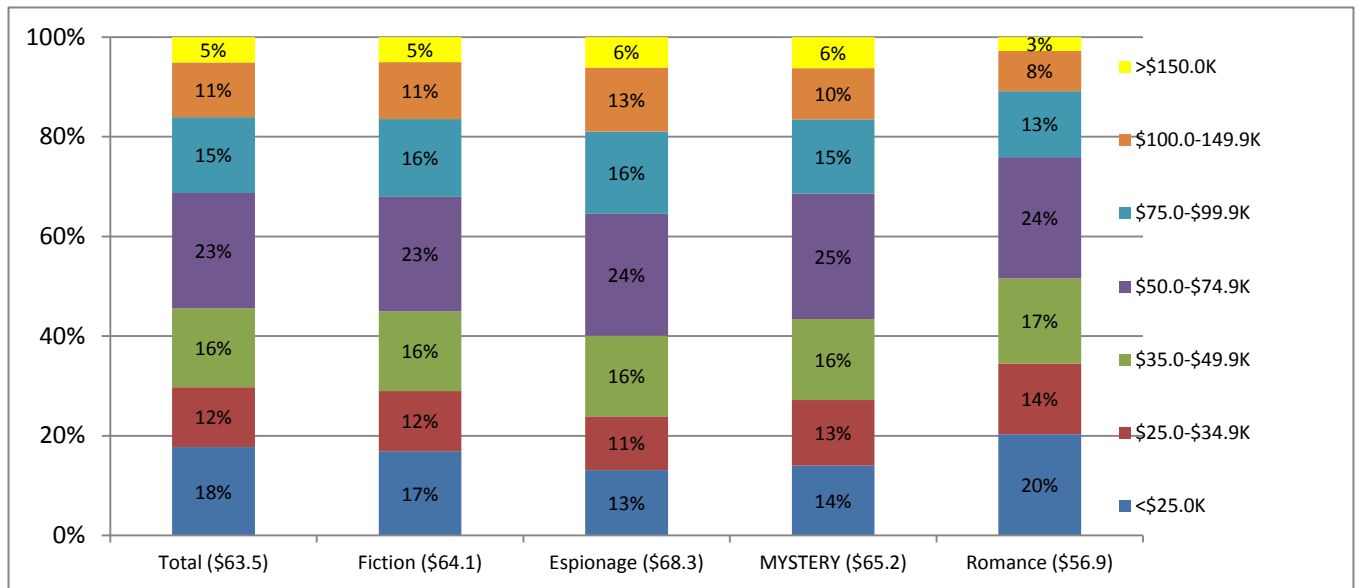

Figure 2. Age Profile of Buyers (first half 2010). Estimated mean age is shown in parentheses: for comparative purposes only.

Figure 3. Income Profile of Buyers (first half 2010). Estimated mean income is shown in parentheses: for comparative purposes only

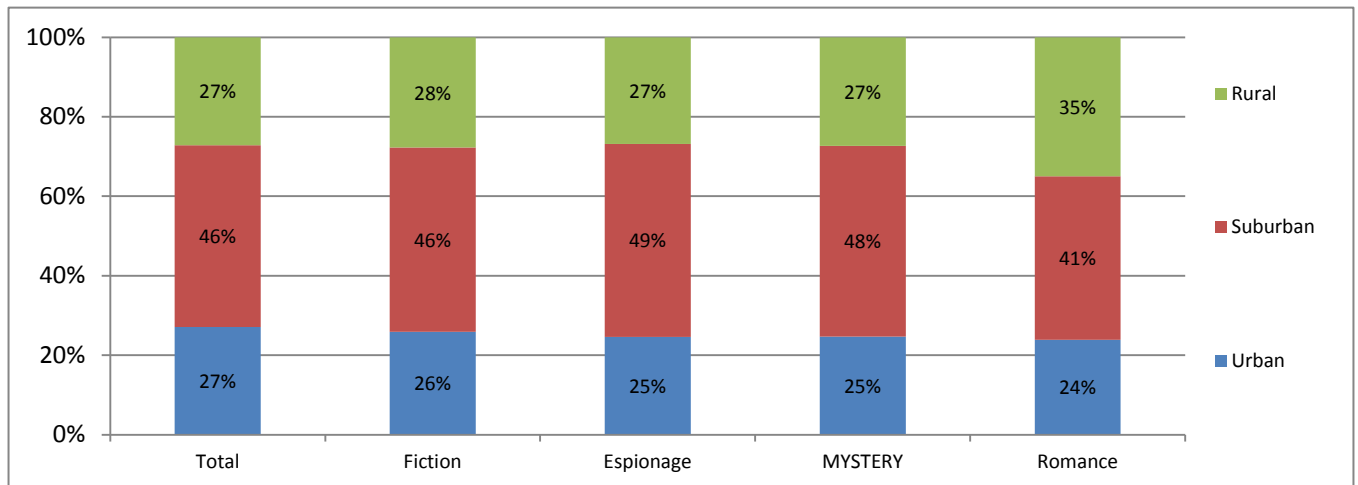**Figure 4. Population Density of the Book Buyer's Location**

Figure 5. Geographic Distribution of the Book Buyer (first half 2010)
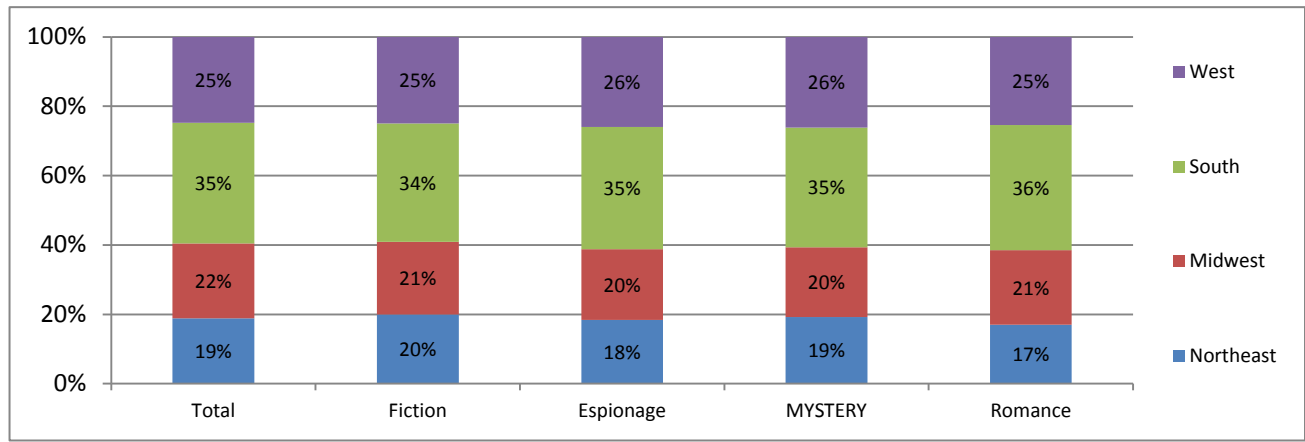
Figure 6. Household Composition of the Book Buyer (first half 2010)
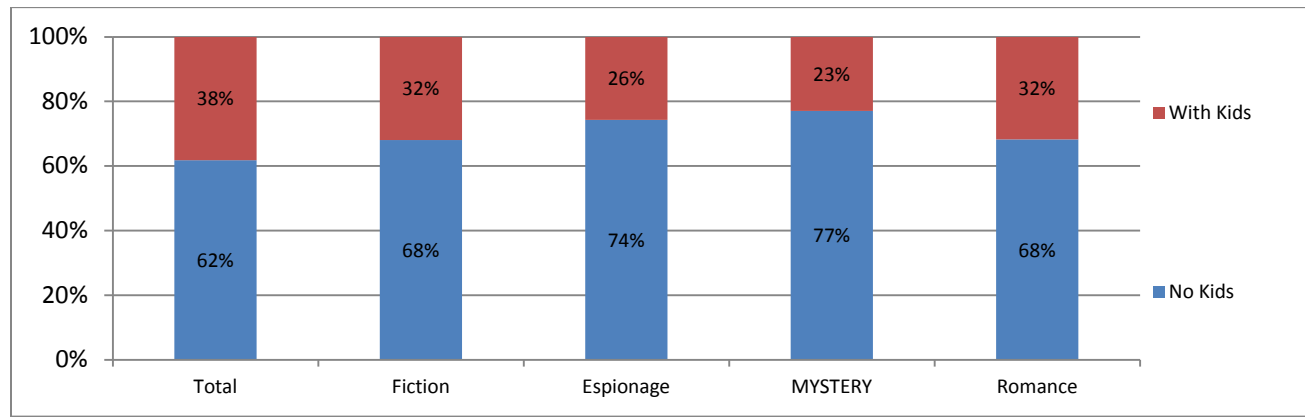
How do Mystery Buyers Differ from Fiction Buyers in General?

In the PubTrack Consumer monthly tracker, we ask all respondents a series of questions about their various online and reading activities. The following chart summarizes the differences in activities between all fiction readers and mystery readers. For example, while we see that 62% of fiction buyers in general participate in online social networking to a heavy or moderate extent, only 57% of mystery buyers do this. We also see that mystery buyers are somewhat more likely to read print newspapers.

Shows percentage of Buyers who participate in given activity to a moderate or heavy extent in the first half of 2010:

	Fiction	Mystery
Online/Play Web-Based Games	54%	54%
Online/Random Web Surfing	85%	83%
Online/Email/Instant Messaging	92%	94%
Online/Work	63%	61%
Online/Read Newspaper/Magazines	53%	54%
Online/Read/Use Blogs/Boards	37%	34%
Online/Shopping	59%	62%

(continued)	Fiction	Mystery
Online/Social Networking	62%	57%
Online/Visit Book Social Networks	16%	14%
Watch TV Show Download to PC clarify	34%	27%
Read Magazines (print)	71%	74%
Read Newspapers (print)	69%	74%
Read Books (print)	87%	89%
Read Digital Books on Device/PC	12%	12%
Read Books on Mobile Phone/PDA	7%	5%
Listen to Audio Books	12%	13%
Discuss Books with Others	50%	53%
Participate in a Reading group/club	11%	9%
Listen to Music on Digital Device	57%	51%
Watch Movies On DVD	72%	68%
Discuss Books Online Social Net-Heavy	11%	8%

What We Learned from Section 1:

- *68% of mystery buyers are female.*
- *48% of mystery buyers are over the age of 55.*
- *48% of mystery buyers live in suburban areas.*
- *35% of mystery buyers live in the South.*
- *77% of mystery buyers live in households with no children living at home.*
- *Mystery buyers are similar to other genre buyers in terms of income.*
- *Mystery buyers are less likely than general fiction buyers to participate in social media such as Facebook and more likely to consume traditional media such as print newspapers and magazines.*
- *94% of mystery buyers use the computer for email and 83% use the computer for random web surfing, but only 34% read blogs (37% of general fiction buyers read blogs).*

Section 2: Purchase of Mystery Books:

Outlet share:

Here we look at where mystery books were purchased based on the Bowker monthly tracker. Note this is purchase, not acquisition, so borrowing from a library and other non-purchase acquisitions are not shown here. In 2010, more mystery book dollars were spent at Amazon and through book clubs than at Barnes and Noble.

Figure 7. Outlet Share in Quarter 2, 2010 based on Dollars (Source: Bowker PubTrack Consumer Monthly Tracker)
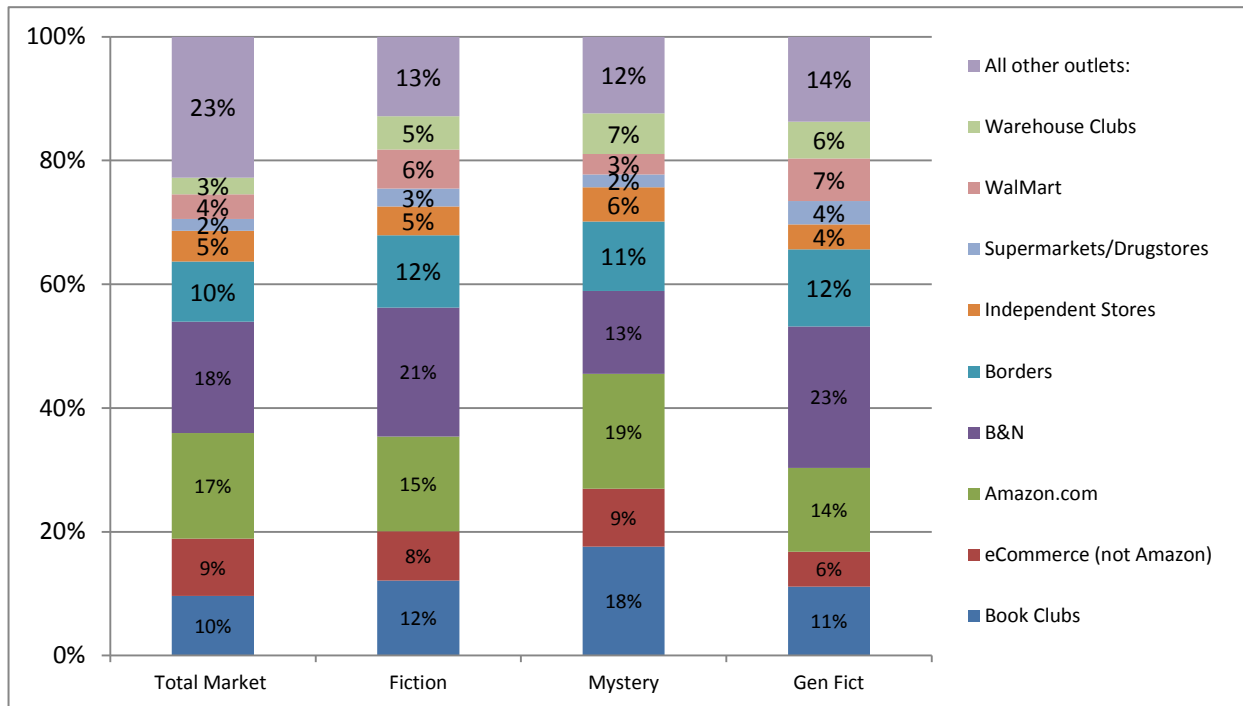
Note: all others outlets = thrift/sidewalk sales, etc.

We asked respondents in the survey where they purchased any mystery in the past three months. Respondents were allowed to select up to three retail outlets so the percentages will not add to 100%. This shows some clear distinctions by demographic segment, with younger segments much more likely to say they got their books online.

Figure 8. Source of mystery books purchased: up to 3 responses allowed (will not add to 100%)
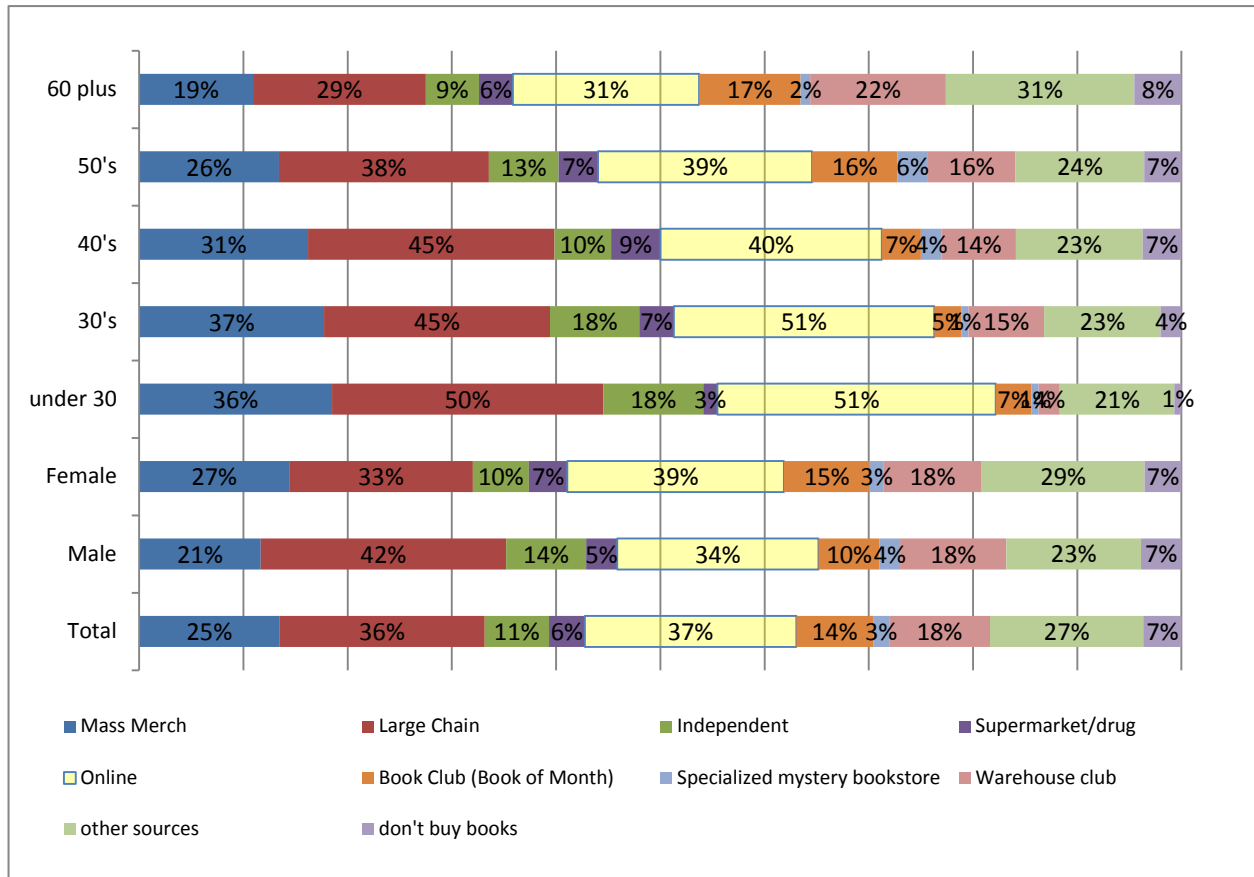
We also asked a broader question about where they acquired their mystery books (not just purchased). Responses from this question show that….

* Stores are the most common source of mystery books, followed by online. Men and those in their 40's appear to be more loyal store purchasers.

*The library is the number 3 source.

* Book clubs (like Book of the Month, Mystery Guild, etc.) come next, with a particularly strong share among those 60-plus.

*Other sources include e-book apps and miscellaneous, such as swap sites.

Figure 9. Single method most used to acquire mystery books.
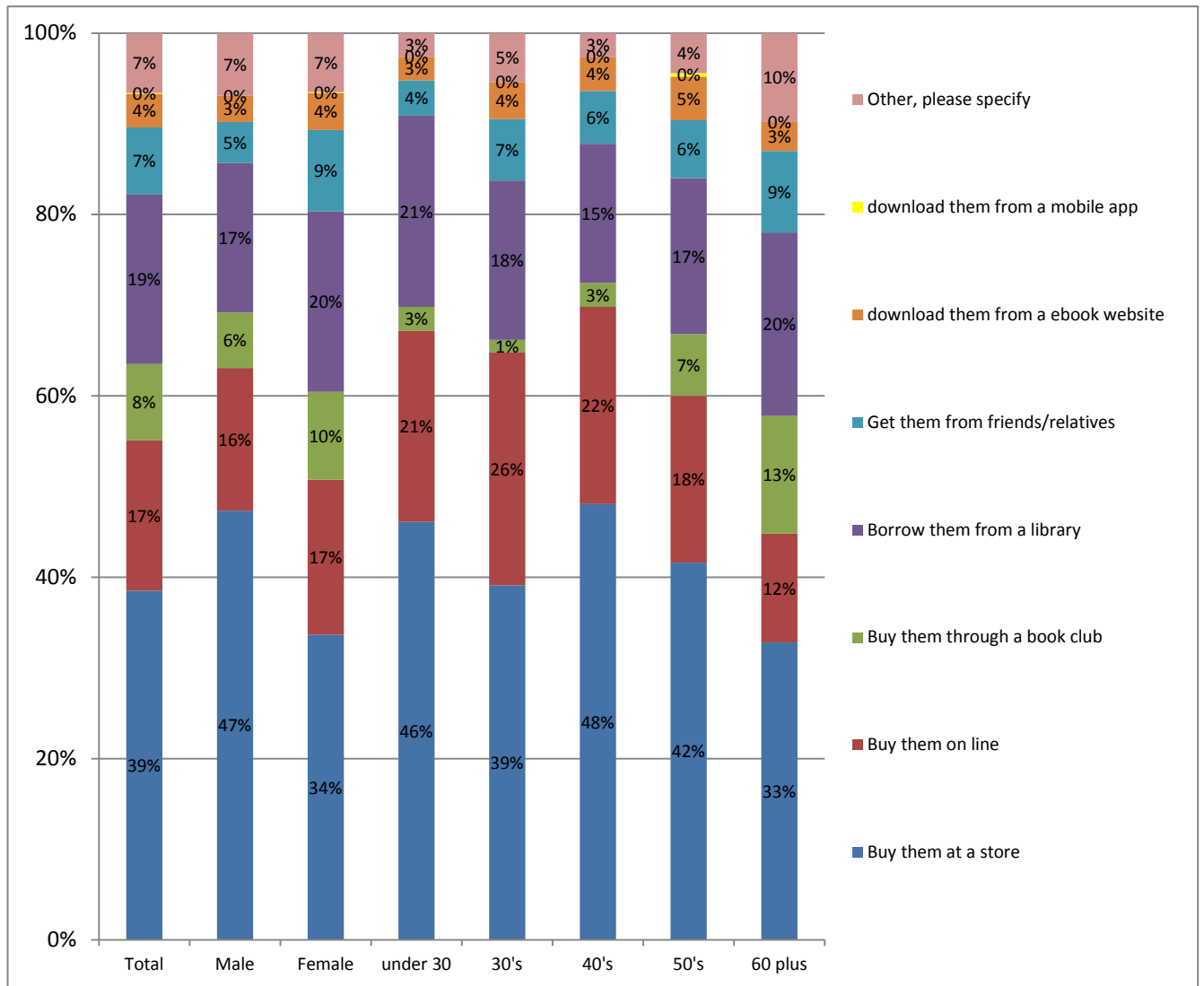
Note that the 'brick-and-mortar' store is the number one source of mystery books, which means, as we'll see later when we look more closely at awareness factors and reasons for purchase, that attention to the cover art and cover copy by the author and publisher is still very important.

Reasons for borrowing at the library….

We also followed up with a question for those who borrow books from the library. It is no surprise that the primary reason is to save money. For those in their 40's or younger, they are also likely to be in the library anyway, especially if they are there for their kids.

Figure 10. Reasons for acquiring books at the library (Multiple responses allowed, so will not add to 100%)
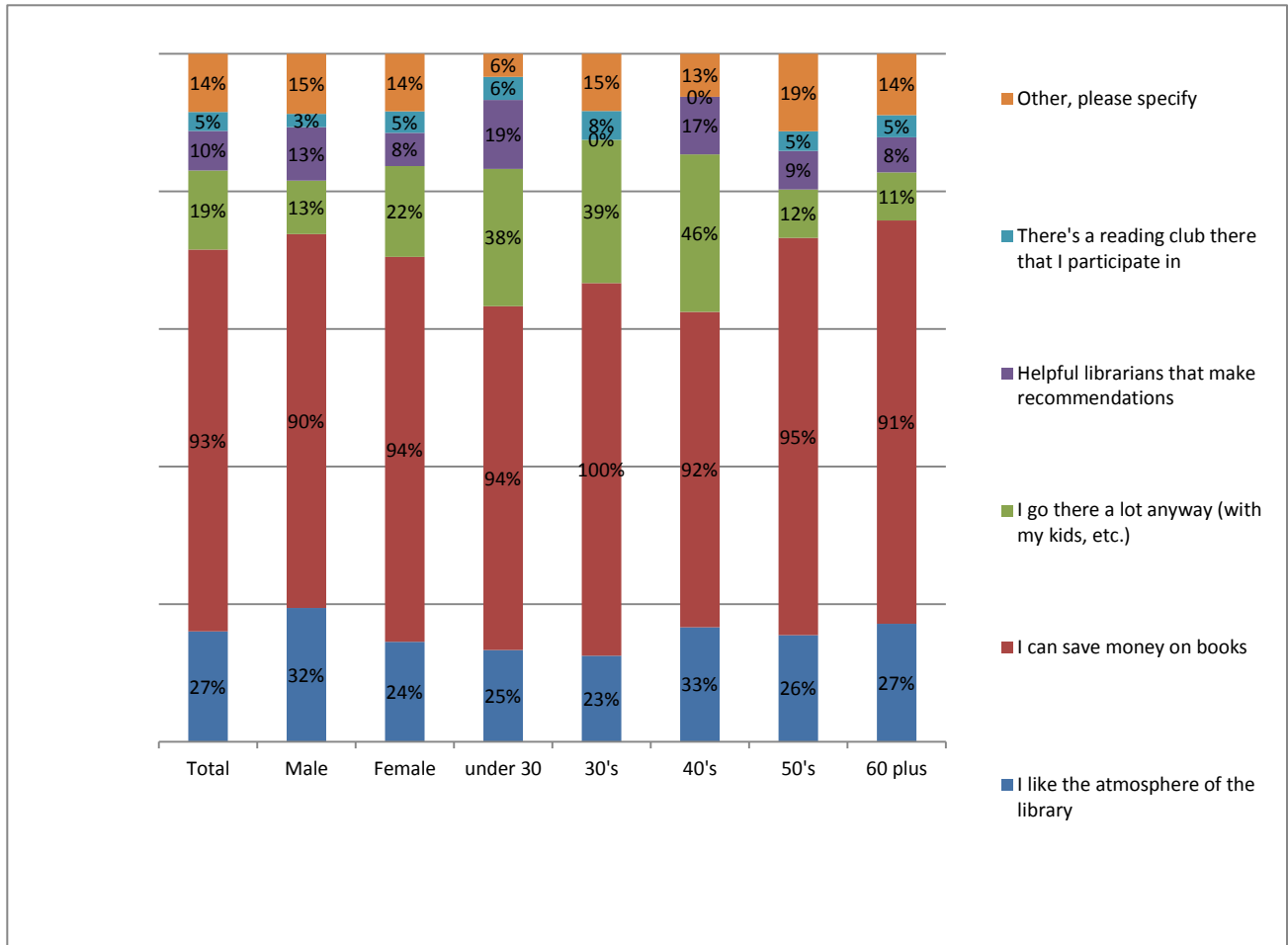
What We Learned in Section 2:

- *39% of mysteries are purchased in brick and mortar stores.*
- *Around 20% of all readers acquire mysteries from libraries—the second most popular place for readers to find mystery novels.*
- *17% of mysteries are acquired from online retailers—more than other types of fiction.*
- *47% of books purchased by men are purchased in stores.*
- *51% of readers under 30 say they purchase mysteries from online retailers.*
- *13% of readers over 60 years of age buy mysteries from book clubs.*
- *Book clubs (such as Mystery Guild) attract more female buyers than male buyers.*

Section 3: What Influences Mystery Book Sales

In this section we look at the major drivers for purchasing mystery books overall and in various channel categories. Data in this section is mainly derived from the PubTrack monthly tracker.

In the following chart, from the PubTrack monthly tracker, we rank how buyers became aware of the books they bought. Knowing/liking the author leads the way as the main driver of awareness, followed by series, display in store, recommendation. It is noteworthy that the book club (defined as commercial clubs like Book-of-the-Month and Mystery Guild) as an awareness factor ranks above recommendation.

Ranking of Units 2009	Rank All Fiction	Rank Espionage	Rank Fantasy	Rank General	Rank Mystery	Rank Romance	Rank Sci-Fi
Know/Like this author	1	1	2	1	1	1	1
Part of a series	2	3	1	3	2	2	2
In-Store Display/On Shelf/Spinning Rack	3	2	3	2	3	3	3
Friend/Relative Recommend	4	4	4	4	5	5	5
Book Club (BOMC/Mystery Guild)	5	6	8	6	4	4	4
Best Seller List	6	5	12	5	7	7	11
Online - Book Review	7	7	5	7	6	6	7
Online - Retailer Recommend (e.g., Amazon.com, B&N.com)	8	8	7	8	8	8	8
Online - Author's Website	9	9	6	12	11	11	6
Book Review (Not Online)	10	10	25	10	12	12	15

How does Awareness Differ by Retail Channel?

The following chart, also from PubTrack's monthly tracker, shows awareness of a book by channel (the over-arching category where books are purchased by consumers).

Book Awareness (All) - Less Not Reported	Total	Book Clubs	Ecomm	Large Chain	Independ.	Mass Merch	Grocery	Warehse
In-Store Display/On Shelf/Spinning Rack	25%	6%	N/A	30%	30%	45%	64%	40%
Friend/Relative Recommendation	13%	6%	15%	16%	16%	11%	4%	13%
Best Seller List	7%	8%	8%	7%	5%	9%	8%	17%
Online - Book Review	5%	11%	9%	4%	3%	3%	4%	2%
Online - Author's Website	5%	4%	8%	5%	5%	5%	3%	2%
Banner Ad on a website	3%	8%	7%	2%	1%	2%	0%	2%
Email From Retailer	3%	11%	5%	2%	1%	2%	1%	1%
Book Review (Not Online)	3%	5%	4%	3%	2%	2%	1%	3%
In-Store Sales Clerk	2%	2%	1%	3%	3%	1%	2%	1%

Notice, for example, that books bought where they are likely to be displayed "face out," such as warehouse stores, supermarkets and mass merchandisers like Wal-Mart and Target, are more likely to be driven by what's on the shelf. Therefore we can't over-emphasize the importance of the cover in these channels where the purchase is driven so heavily by impulse.

What was the main reason for purchase?

From the monthly tracker, we can see the reasons why mystery books were ultimately purchased, and how these reasons compare with fiction book sales overall. We can see, for example**, that liking the series and character** is a much more important purchase reason for mystery than it is for fiction in general. We see again that the price and information on the cover were also ranked high, though cover art ranks slightly lower for mysteries than other fiction.

General Purchase Reasons (All) - Less Not Reported	Mystery	Fiction	Differential
Like Author	53%	50%	3%
Like This Series	39%	28%	11%
Like Character	29%	16%	13%
Liked Topic/Subject	21%	22%	-1%
Price	16%	15%	1%
Cover/Jacket Description/Blurbs from Other Authors	11%	11%	0%
Special Offer/Price	10%	9%	1%
Looked Through Book, And Liked It	9%	11%	-1%
Intrigued By Book Title	9%	11%	-2%
Recommend From Someone I Know	7%	10%	-4%
Other Reason	6%	6%	0%
Movie/TV Show Based On Book	4%	4%	0%
Good Book Review	4%	6%	-2%
Cover Art	3%	5%	-3%
Recipient Asked For/Likes Book	3%	3%	0%
On Bestseller List	2%	3%	-1%
Publisher's Reputation	2%	3%	-1%
Heard Ad About Book	1%	3%	-2%
Heard Author Discuss Book	1%	1%	0%
Recommend From Salesperson/Staff	1%	1%	0%
Recommend From Media Personality/TV Show	0%	1%	0%
Class/Study	0%	1%	-1%
Work/Professional Reasons	0%	0%	0%

How Does "Reason for Mystery Purchase" Differ by Channel?

Overwhelmingly, a mystery title is purchased because people like the author and/or series. Compared to other channels, book purchases at mass merchandisers such as Wal-Mart, and supermarkets/drug stores are more likely to be driven by price and, as noted earlier, the cover art and ability to thumb through the book. This means marketing and merchandising may need to be different at these outlets to make books distinctive and more appealing to the consumer.

	Total	Book Clubs	Ecomm	Large Chain	Independ.	Mass Merch	Grocery	Warehse
Like Author	52%	51%	51%	52%	51%	54%	59%	67%
Like This Series	39%	40%	46%	40%	41%	39%	42%	30%
Like Character	26%	27%	28%	28%	32%	21%	26%	28%
Liked Topic/Subject	22%	23%	25%	21%	26%	22%	19%	14%
Price	13%	9%	10%	9%	7%	*12%*	*14%*	*15%*
Cover/Jacket Descp./Testimonials	11%	8%	6%	9%	12%	*16%*	*15%*	14%
Looked Through Book and Liked It	11%	5%	3%	11%	14%	13%	17%	13%
Intrigued By Book Title	10%	12%	7%	10%	11%	9%	9%	5%
Recommend by Someone I Know	10%	6%	11%	12%	15%	11%	5%	8%
Special Offer/Price	9%	10%	6%	9%	5%	8%	14%	7%

What Would Prompt a Mystery Reader to Buy More Books?

In the Sisters in Crime survey, we asked respondents which of these marketing elements might be more likely to prompt them to buy in a store or online. A comparison of those who said "*very likely*" to each is shown in the following table. Note that "lower price" is most likely to prompt a reader at any age to buy more books. Those in their 30's or younger are more likely to be swayed by special offers like coupons or buy one, get one free promotions.

	Total	under 30	30's	40's	50's	60 plus
Lower prices	55%	54%	69%	60%	56%	52%
Paperback out sooner	42%	36%	57%	47%	45%	39%
Buy one, get one free	42%	41%	69%	44%	40%	39%
Discount coupon	29%	33%	50%	41%	26%	24%
Store had better selection	12%	21%	17%	12%	14%	9%
Store was closer	11%	13%	14%	13%	11%	10%
e-book	10%	10%	12%	16%	5%	10%
Reading group at bookstore	3%	8%	5%	4%	3%	2%

As noted, younger buyers are more likely to be prompted by lower price. Note that those in their 40's are more likely to purchase an e-book. This age group appears to be the sweet spot for e-books, as 16% say having e-book availability would encourage them to buy more books.

The following series of charts shows more detail on these influencers, by age category:

Figure 11. Purchase influencers for those in 20's (N= 75) (may not add to 100% due to rounding)

Figure 12. Purchase Influencers: 30's (N = 74)
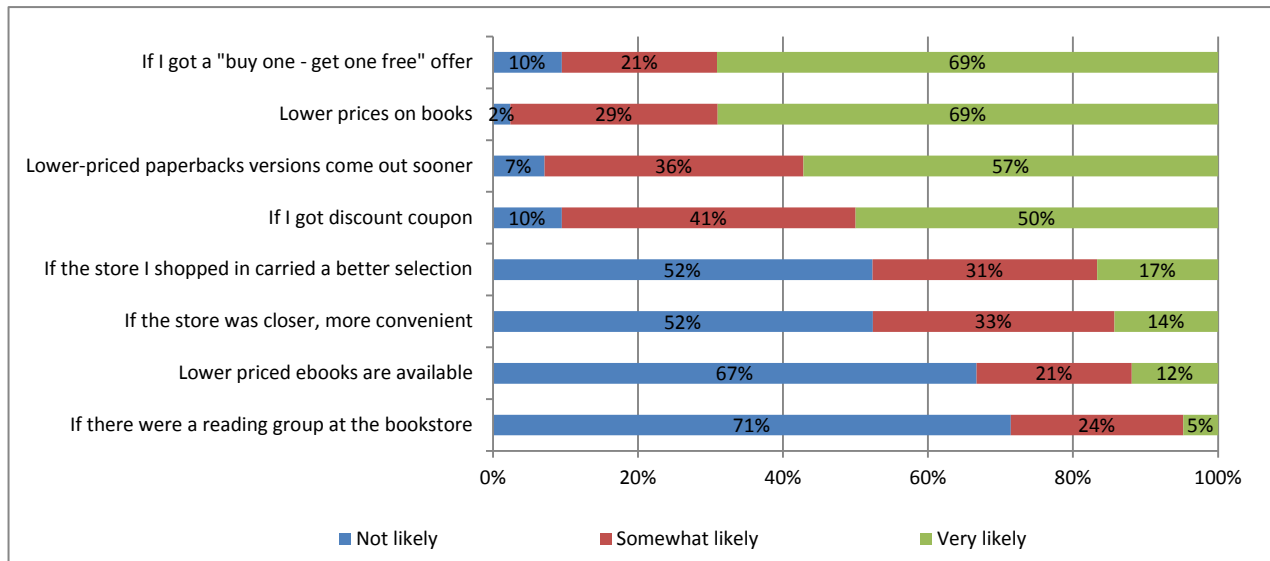
Figure 13. Purchase Influencers: 40's (N = 156)

Category	Not likely	Somewhat likely	Very likely
Lower prices on books	7%	33%	60%
Lower-priced paperbacks versions come out sooner	16%	37%	47%
If I got a "buy one - get one free" offer	17%	39%	44%
If I got discount coupon	11%	48%	41%
Lower priced ebooks are available	75%	9%	16%
If the store was closer, more convenient	51%	36%	13%
If the store I shopped in carried a better selection	48%	40%	12%
If there were a reading group at the bookstore	87%	9%	4%

■ Not likely   ■ Somewhat likely   ■ Very likely

Figure 14. Purchase Influencers: 50's (N = 250)

Category	Not likely	Somewhat likely	Very likely
Lower prices on books	5%	39%	56%
Lower-priced paperbacks versions come out sooner	22%	33%	45%
If I got a "buy one - get one free" offer	14%	47%	40%
If I got discount coupon	19%	55%	26%
If the store I shopped in carried a better selection	59%	27%	14%
If the store was closer, more convenient	49%	41%	11%
Lower priced ebooks are available	76%	20%	5%
If there were a reading group at the bookstore	86%	11%	3%

■ Not likely   ■ Somewhat likely   ■ Very likely

Figure 15. Purchase Influencers: 60's (N = 500)

	Not likely	Somewhat likely	Very likely
Lower prices on books	12%	36%	52%
If I got a "buy one - get one free" offer	15%	46%	39%
Lower-priced paperbacks versions come out sooner	26%	36%	39%
If I got discount coupon	28%	48%	24%
If the store was closer, more convenient	61%	29%	10%
Lower priced ebooks are available	76%	14%	10%
If the store I shopped in carried a better selection	62%	29%	9%
If there were a reading group at the bookstore	88%	11%	2%

The following are some representative, open-ended comments from respondents on what would prompt them to buy more mystery.

What Else Would Prompt You to Buy More Mystery Books?

Teaser excerpts or chapters...enough to get the flavor of the particular story as well as the author's style.

Really not anything. My local library has a great selection & I read 5–7 books a week

Lately there seem like a bunch of silly mysteries, not worth bothering about

Maybe the book store do a 'quarterly big sale' on a regular basis with books that are not selling well?

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What Media Most Influences Mystery Readers to Buy Books?

The following section looks at how successful various media influencers have been in getting readers to read a mystery. Respondents were asked to rank 27 items in terms of how much influence that item had on the purchase of their book. For this presentation, we chose to rank these items by the percent that said the item had a "high influence."

This chart represents those items that ranked higher than others:
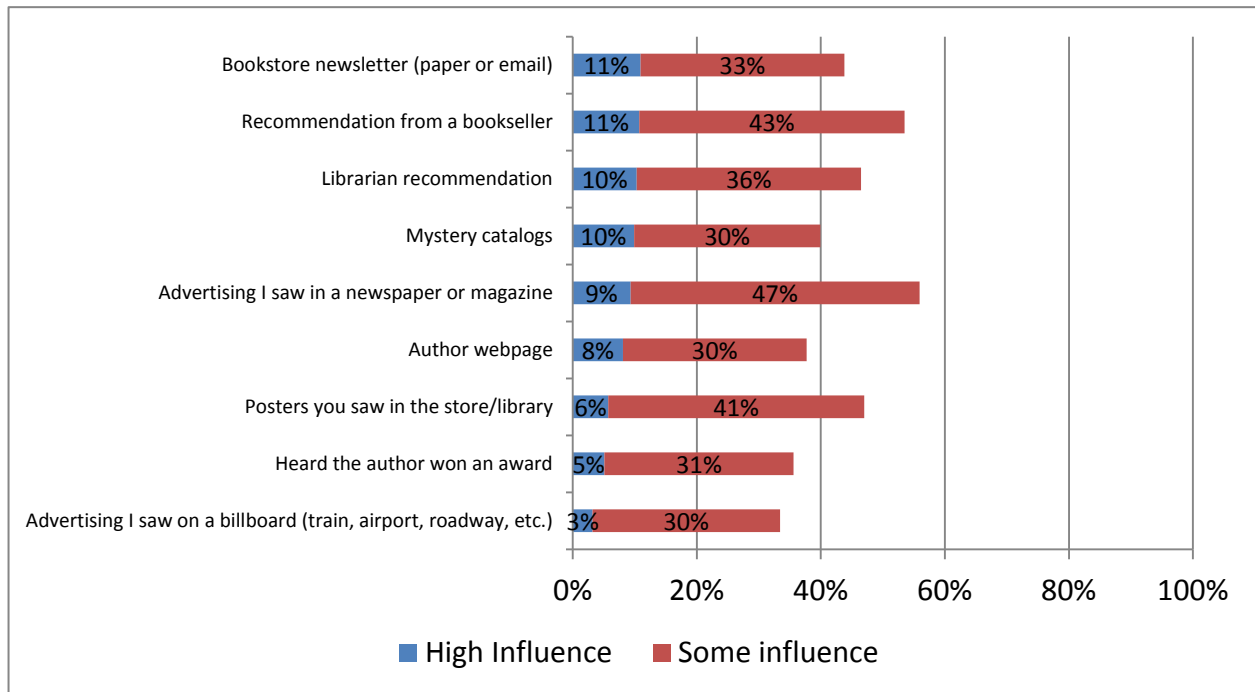
Figure 16. Highest Influencers
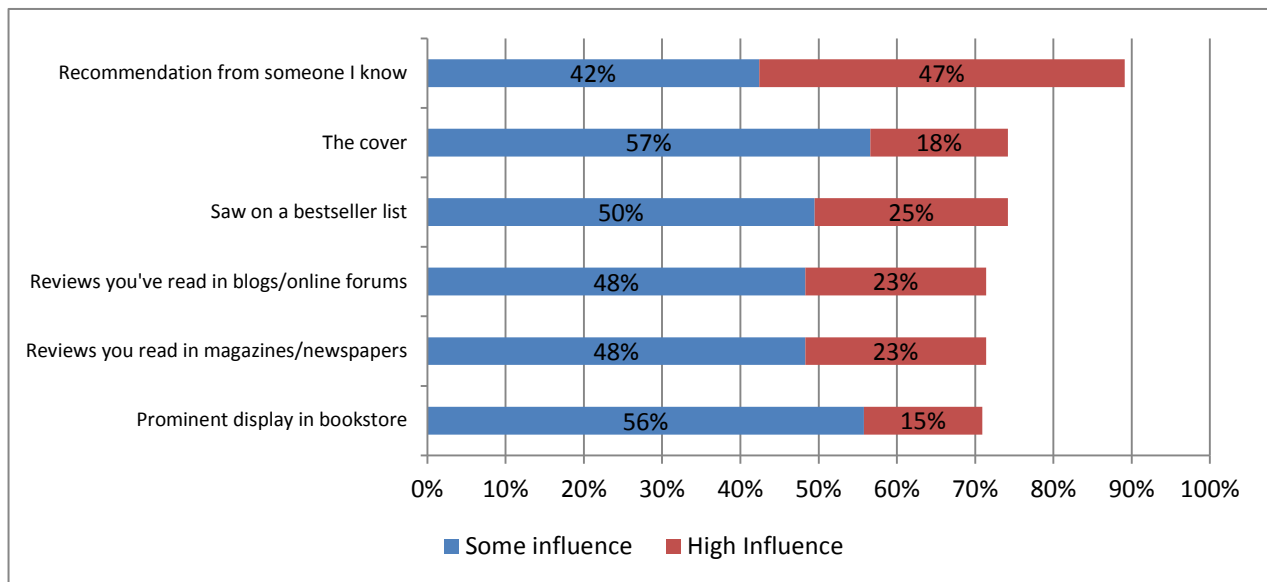
- From the list of 27 items, 'recommendation' comes out first, with reviews (online and print) also having a high influence on nearly a quarter of respondents.
- But note that if we combine the high and some influence, the cover also comes out as quite important, and would rank #2.
- Best seller lists, reviews, and the cover art and cover copy matter most.

This next chart shows the "middle tier" of influencers. In this tier, we see communications that come from the retailer or the library have some importance.
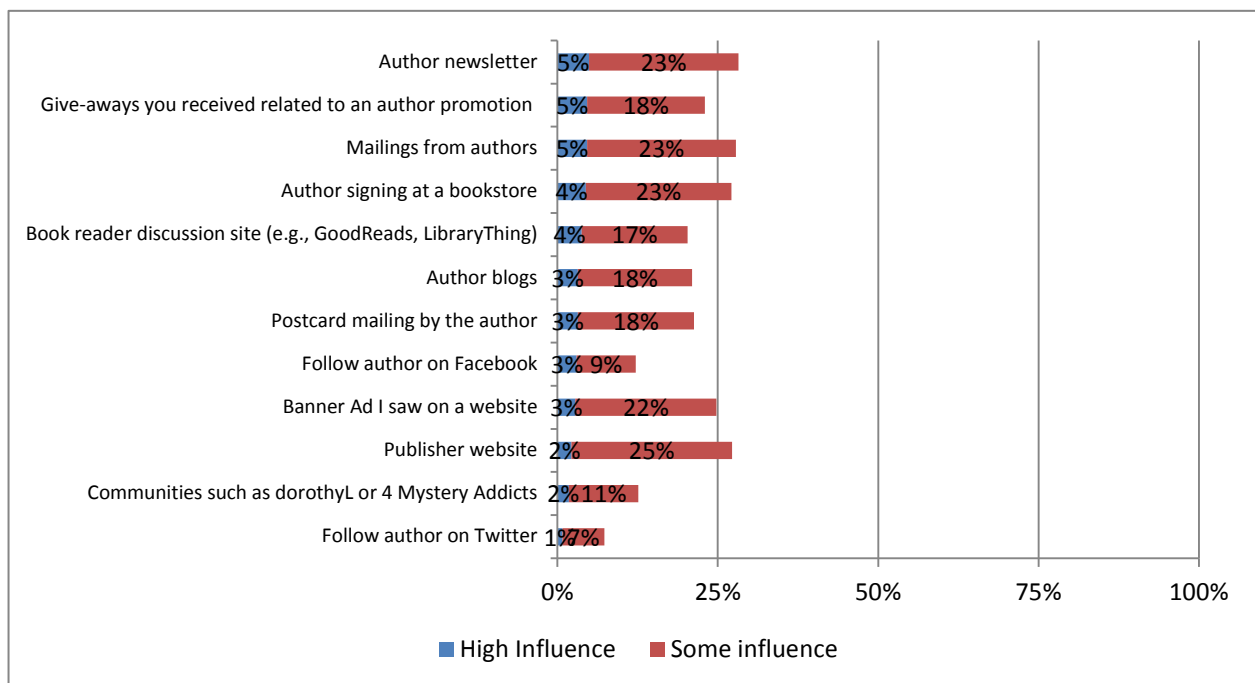- There are several items here for which authors have more control, such as their web page.
- It is noteworthy that traditional media ads rank higher among mystery readers than for readers of other genres.
- In this series of questions, around half of respondents said librarians and booksellers had at least some influence on their reading/buying habits.

Figure 17. Moderate Influencers

Influencer	High Influence	Some influence
Bookstore newsletter (paper or email)	11%	33%
Recommendation from a bookseller	11%	43%
Librarian recommendation	10%	36%
Mystery catalogs	10%	30%
Advertising I saw in a newspaper or magazine	9%	47%
Author webpage	8%	30%
Posters you saw in the store/library	6%	41%
Heard the author won an award	5%	31%
Advertising I saw on a billboard (train, airport, roadway, etc.)	3%	30%

The following chart shows the "lower tier" of influencers. Many of these include the more "non-traditional" and higher tech methods, such as blogs and social network presence.

Figure 18. Low Influencers

Influencer	High Influence	Some influence
Author newsletter	5%	23%
Give-aways you received related to an author promotion	5%	18%
Mailings from authors	5%	23%
Author signing at a bookstore	4%	23%
Book reader discussion site (e.g., GoodReads, LibraryThing)	4%	17%
Author blogs	3%	18%
Postcard mailing by the author	3%	18%
Follow author on Facebook	3%	9%
Banner Ad I saw on a website	3%	22%
Publisher website	2%	25%
Communities such as dorothyL or 4 Mystery Addicts	2%	11%
Follow author on Twitter	1%	7%

The following series of charts will show a few examples of how some elements differ in influence, by age segment:

Figure 19. Media impact on Readers in their 20's (Sorted by major influence):
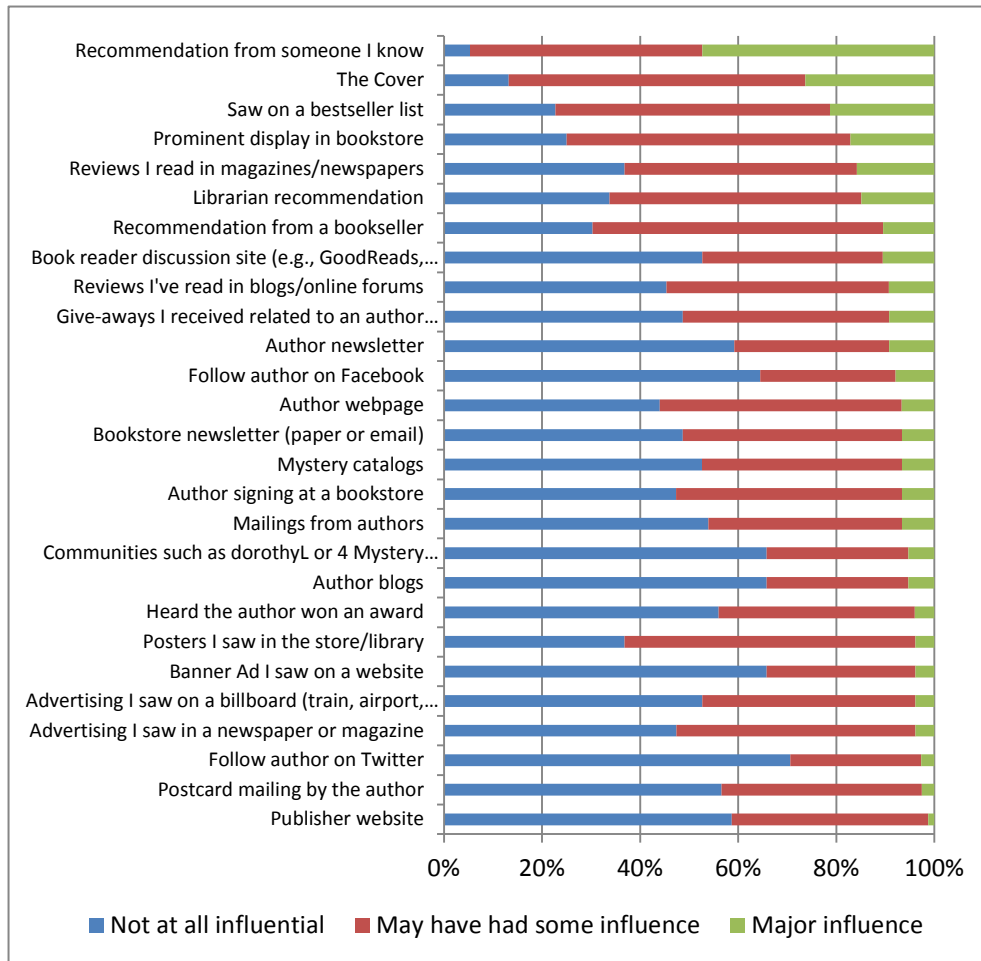
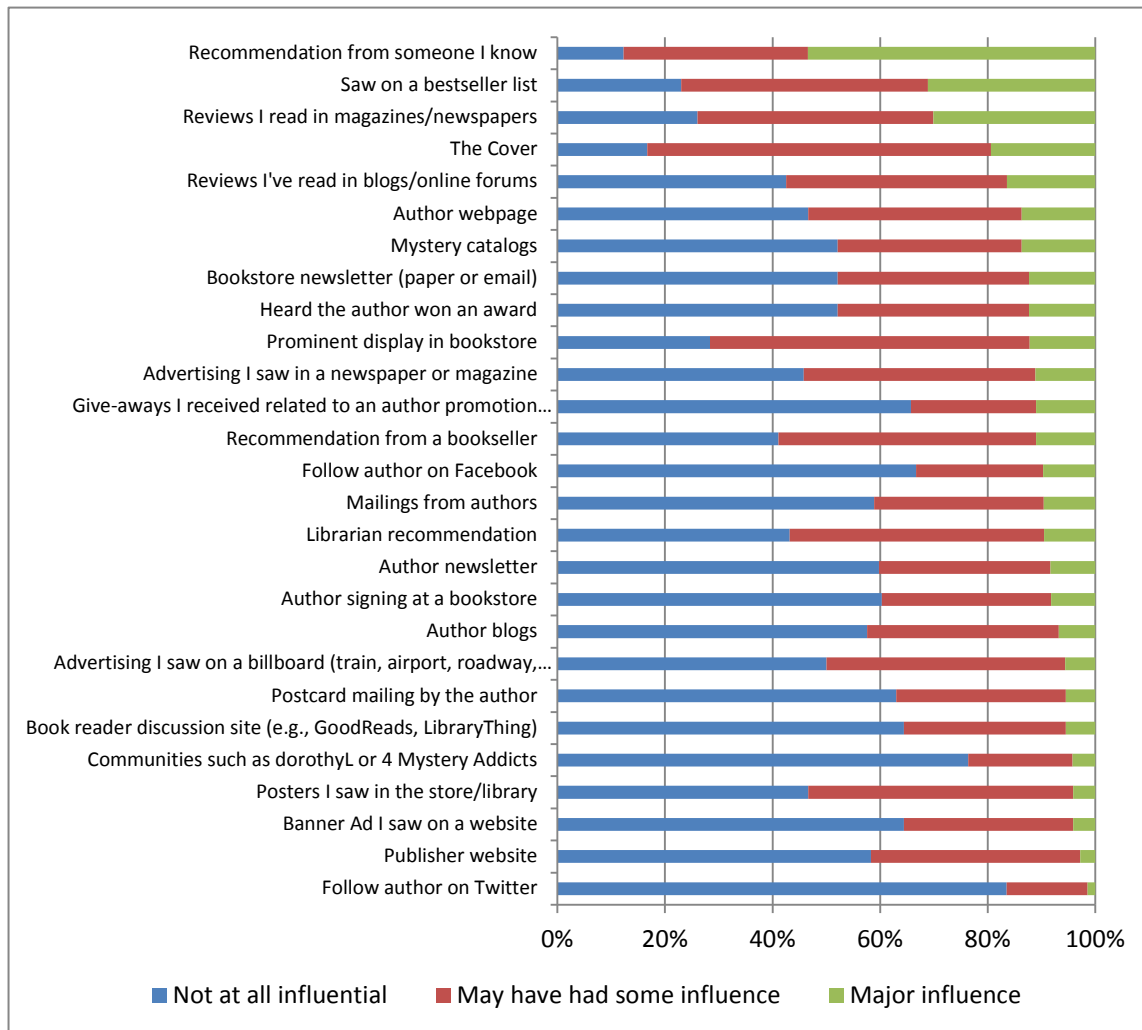**Figure 20. Media impact on Readers in their 30's (Sorted by major influence):**

Recommendation from someone I know
Saw on a bestseller list
Reviews I read in magazines/newspapers
The Cover
Reviews I've read in blogs/online forums
Author webpage
Mystery catalogs
Bookstore newsletter (paper or email)
Heard the author won an award
Prominent display in bookstore
Advertising I saw in a newspaper or magazine
Give-aways I received related to an author promotion…
Recommendation from a bookseller
Follow author on Facebook
Mailings from authors
Librarian recommendation
Author newsletter
Author signing at a bookstore
Author blogs
Advertising I saw on a billboard (train, airport, roadway,…
Postcard mailing by the author
Book reader discussion site (e.g., GoodReads, LibraryThing)
Communities such as dorothyL or 4 Mystery Addicts
Posters I saw in the store/library
Banner Ad I saw on a website
Publisher website
Follow author on Twitter

0%   20%   40%   60%   80%   100%

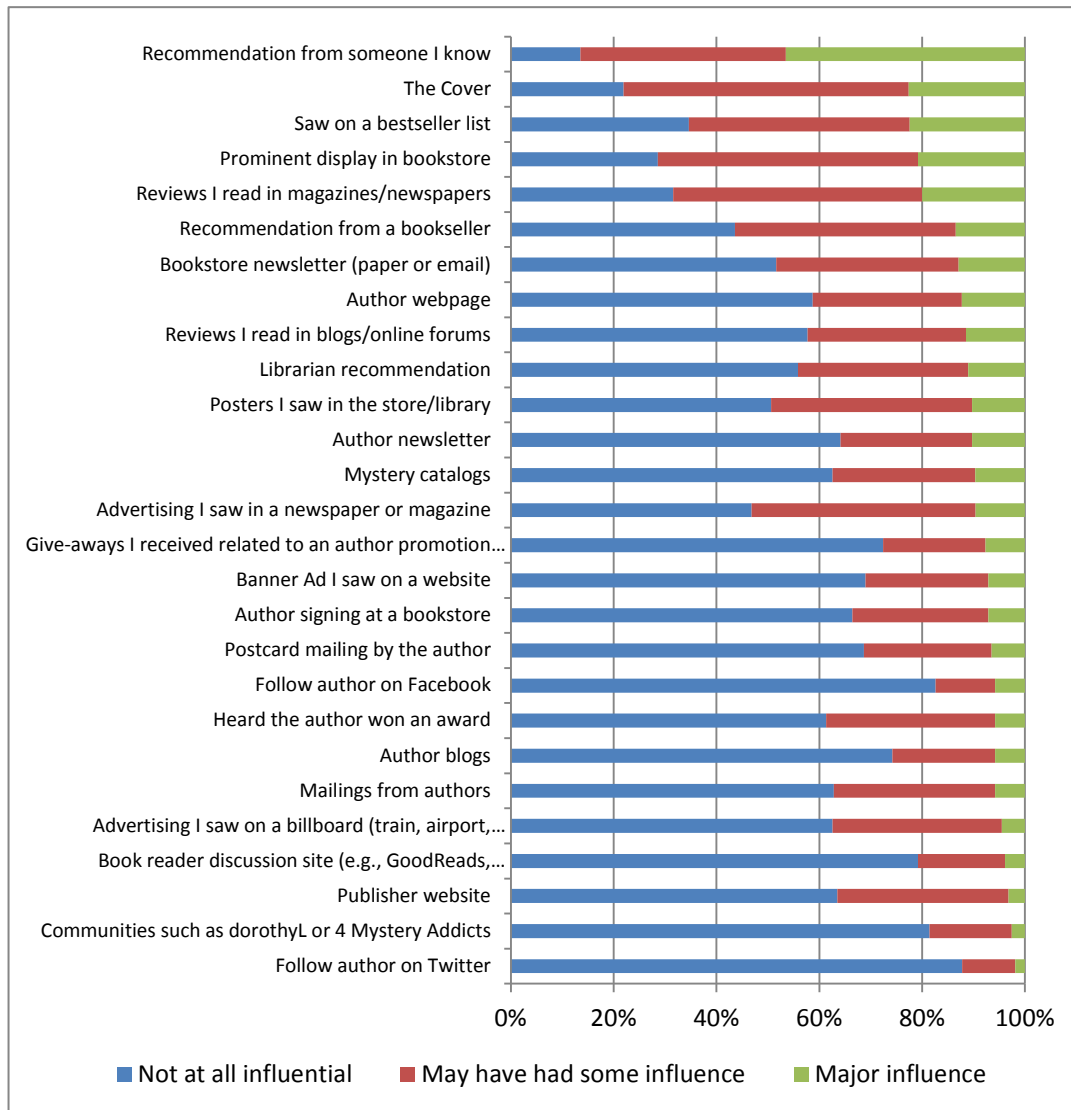■ Not at all influential   ■ May have had some influence   ■ Major influence

Figure 21. Media impact on Readers in their 40's (Sorted by major influence):

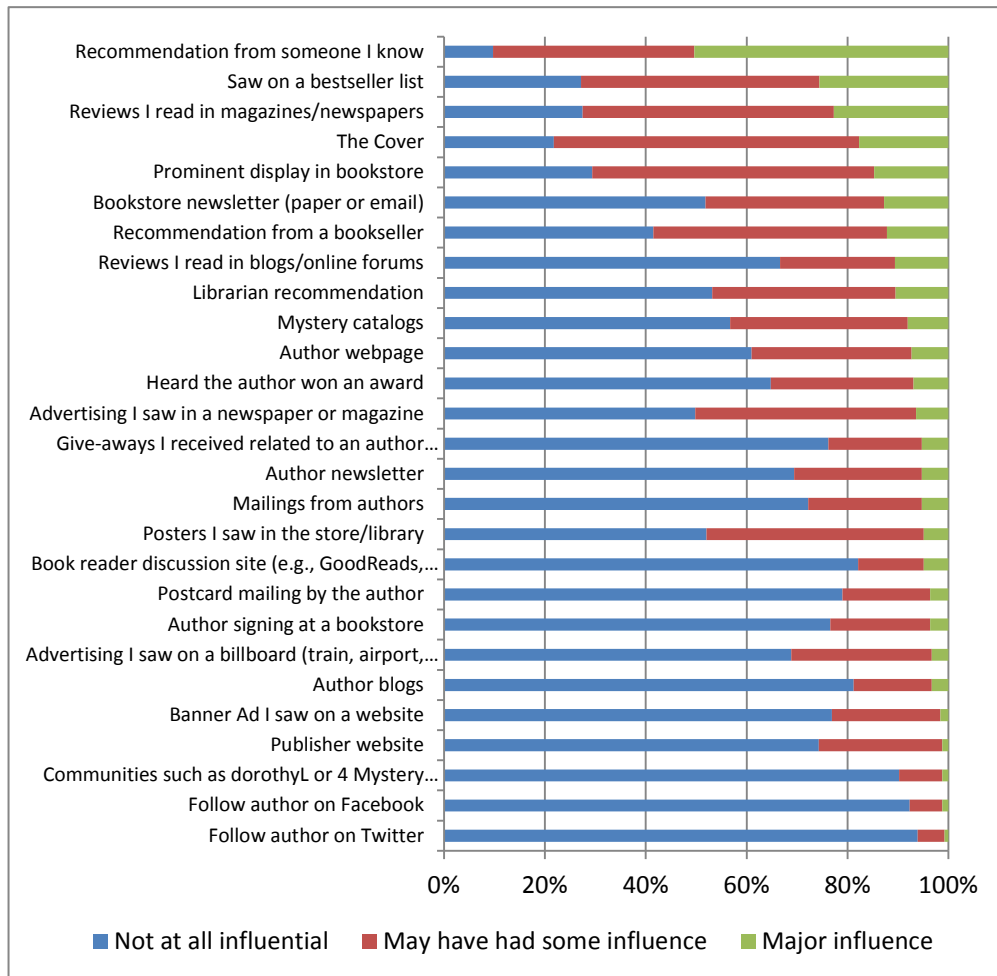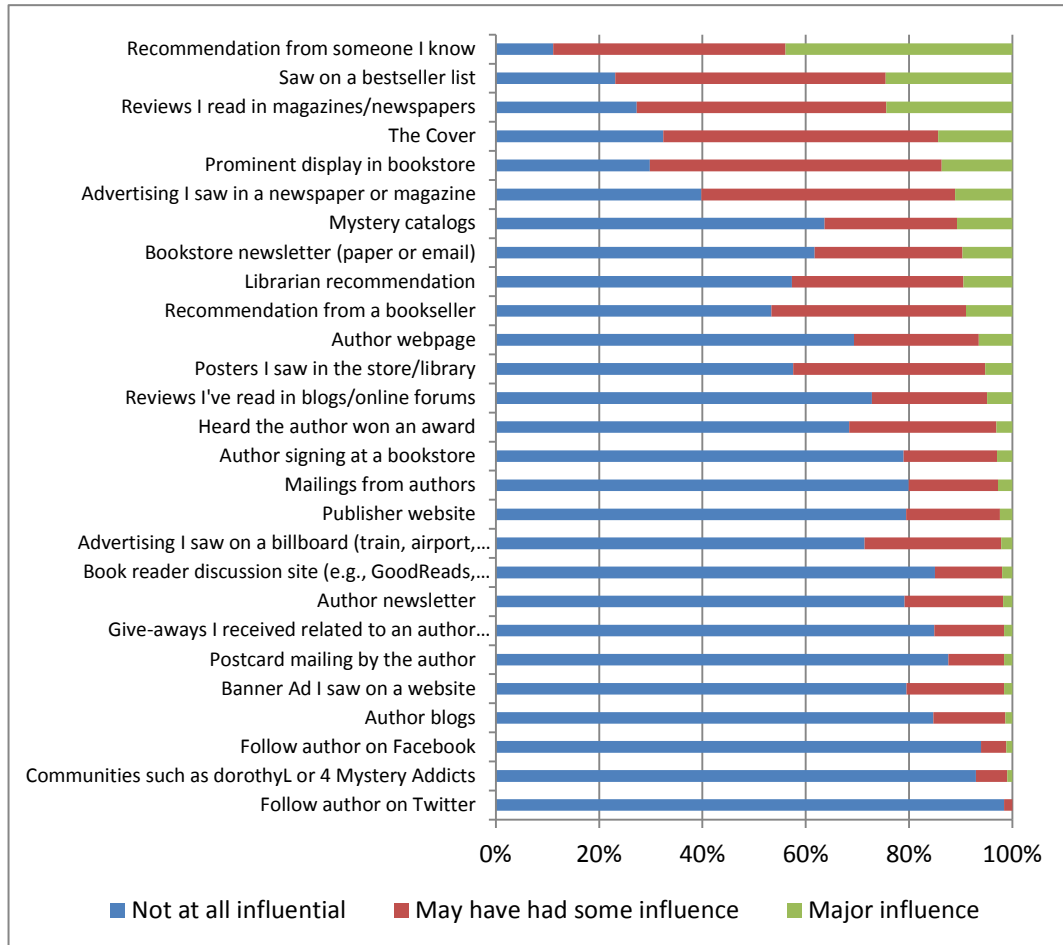**Figure 22. Media impact on Readers in their 50's (Sorted by major influence):**

Chart categories (top to bottom):
- Recommendation from someone I know
- Saw on a bestseller list
- Reviews I read in magazines/newspapers
- The Cover
- Prominent display in bookstore
- Bookstore newsletter (paper or email)
- Recommendation from a bookseller
- Reviews I read in blogs/online forums
- Librarian recommendation
- Mystery catalogs
- Author webpage
- Heard the author won an award
- Advertising I saw in a newspaper or magazine
- Give-aways I received related to an author…
- Author newsletter
- Mailings from authors
- Posters I saw in the store/library
- Book reader discussion site (e.g., GoodReads,…
- Postcard mailing by the author
- Author signing at a bookstore
- Advertising I saw on a billboard (train, airport,…
- Author blogs
- Banner Ad I saw on a website
- Publisher website
- Communities such as dorothyL or 4 Mystery…
- Follow author on Facebook
- Follow author on Twitter

Legend: ■ Not at all influential ■ May have had some influence ■ Major influence

Figure 23. Media impact on Readers in their 60's (Sorted by major influence):

Chart categories (top to bottom):
- Recommendation from someone I know
- Saw on a bestseller list
- Reviews I read in magazines/newspapers
- The Cover
- Prominent display in bookstore
- Advertising I saw in a newspaper or magazine
- Mystery catalogs
- Bookstore newsletter (paper or email)
- Librarian recommendation
- Recommendation from a bookseller
- Author webpage
- Posters I saw in the store/library
- Reviews I've read in blogs/online forums
- Heard the author won an award
- Author signing at a bookstore
- Mailings from authors
- Publisher website
- Advertising I saw on a billboard (train, airport,…
- Book reader discussion site (e.g., GoodReads,…
- Author newsletter
- Give-aways I received related to an author…
- Postcard mailing by the author
- Banner Ad I saw on a website
- Author blogs
- Follow author on Facebook
- Communities such as dorothyL or 4 Mystery Addicts
- Follow author on Twitter

Legend:
- Not at all influential
- May have had some influence
- Major influence

What We Learned in Section 3:

- *The primary factor that influences mystery buyers to make a purchase is knowing and liking the author.*
- *Personal recommendations from friends and family highly influence buyers.*
- *Prominent in-store displays attract buyers.*
- *Cover art and cover information influence buyers.*
- *Readers in their 40's are more likely to buy e-books than any other age group.*
- *Buyers like series mysteries.*
- *For mystery readers, liking the character is more important than for readers of general fiction.*
- *Price influences purchases for all age groups.*
- *Reviews and Bestseller lists influence buyers.*
- *Of only "moderate influence" among buyers are bookstore newsletters, bookseller recommendations, librarian recommendations, mystery catalogs, newspaper and magazine advertisements, author webpages, posters in stores and libraries and billboards and hearing the author has won an award.*
- *"Low influence" factors include author blogs, author mailings, publisher websites, Facebook, banner ads on websites, online communities such as DorothyL and following an author on Twitter.*
- *The majority of mystery buyers over 45 are not influenced by online marketing.*
- *Mystery buyers under the age of 40 can be influenced by online marketing.*

Section 4: Behaviors of Mystery Book Readers:

The following chart shows the volume of mystery books read, shown in terms of hours spent reading mystery per week, and the number of books read so far in 2010.

	Average Hours spent reading mystery per week	Number of mystery books read in 2010 (through August)
Males:	8.6 hours	15
Females:	11.3 hours	22
Under 30:	6.7 hours	10
30's:	7.7 hours	13
40's:	8.3 hours	17
50's	10.3 hours	21
60's +	11.9 hours	22
All Respondents:	*10.4 hours*	*19*

Overall, mystery readers say they are reading, on average, 10 hours a week. As shown above, females and those in their 50's and 60's are the most avid readers. Time spent reading increases with age. Furthermore, mystery readers say they have read over 20 books by September of 2010. Again, females and those in their 50's and 60's are the most voracious readers in terms of number of books. The number of mystery books read increases with age.

How do mystery readers break out in terms of self-reported mystery readership?
Consistent with the above data, females and readers over 50 are the most avid mystery readers.

Figure 24. Level of Reading Mystery

Figure 24. Level of Reading Mystery
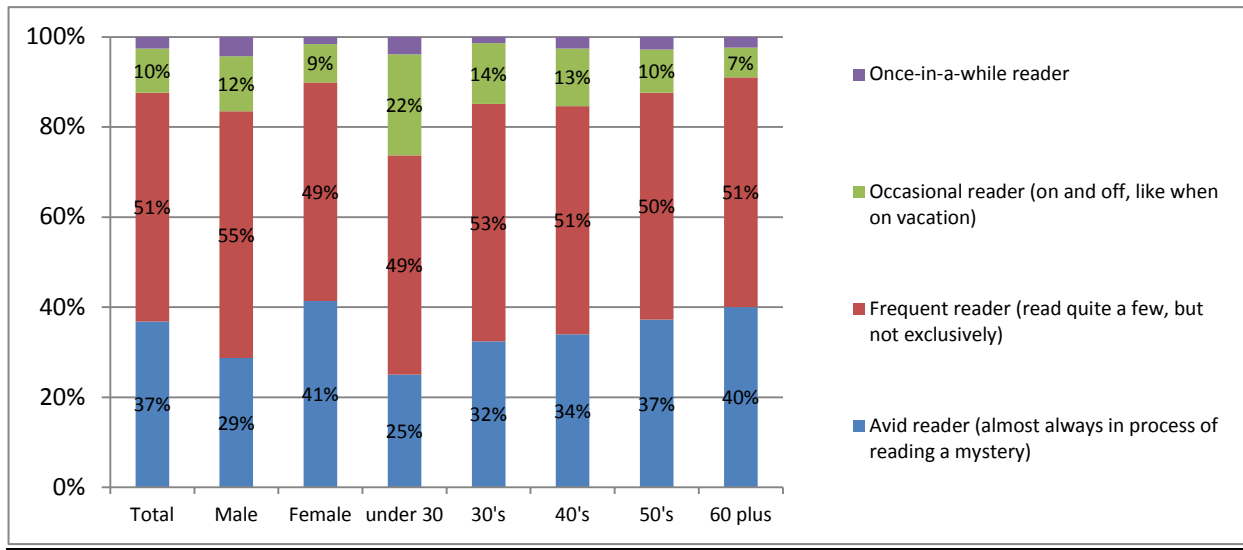
How has mystery reading changed in the past two years?

Overall, 63% say that their reading of mystery has not changed, and more say that it has increased rather than decreased.

Figure 25. How has your mystery reading changed?
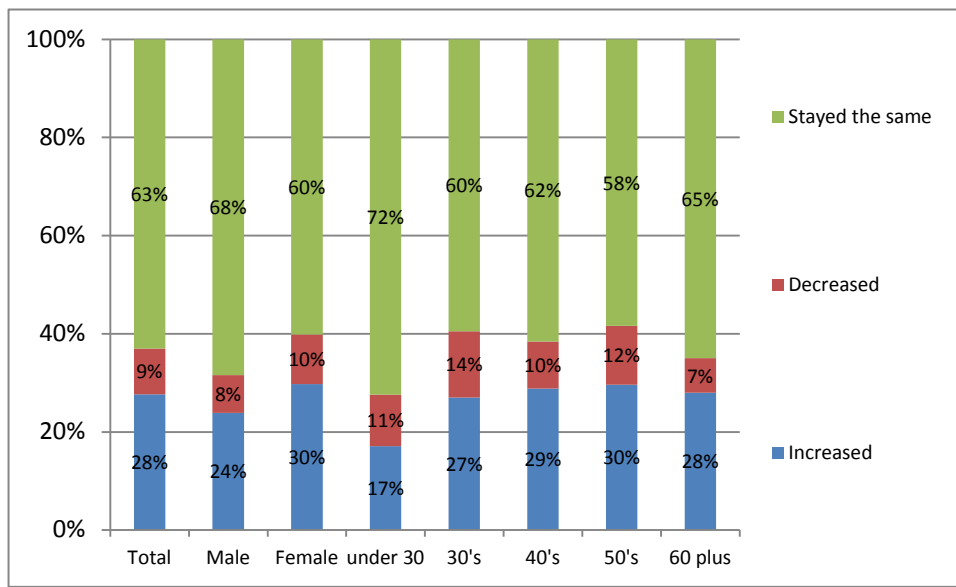
What other genres do mystery readers also read?

While mystery readers tend to be quite loyal to the genre, they do read other types of books. Overall, mystery readers say they are most likely to be also reading or have read general fiction and espionage/thriller. The youngest segment is especially likely to be reading general fiction.

	Total	Male	Female	under 30	30's	40's	50's	60 plus
General Fiction	56%	52%	59%	62%	53%	58%	58%	55%
Espionage / Thriller	56%	71%	48%	54%	57%	58%	54%	56%
Literary Fiction	33%	28%	35%	34%	45%	36%	32%	30%
History	30%	42%	23%	21%	20%	28%	34%	31%
Biography, Autobiography	29%	27%	29%	22%	27%	33%	31%	27%
Romance	27%	4%	39%	45%	38%	31%	24%	22%
Science fiction/fantasy	26%	34%	22%	33%	27%	36%	30%	20%
Science Fiction	21%	29%	17%	25%	24%	26%	23%	18%
Fantasy	14%	12%	16%	32%	20%	21%	14%	9%
Other fiction, please specify	10%	8%	11%	8%	7%	10%	12%	10%
Other non-fiction, please specify	10%	9%	10%	3%	8%	10%	11%	10%
Westerns	8%	14%	5%	5%	3%	8%	10%	9%
Religious Fiction	7%	6%	7%	15%	14%	7%	6%	5%

Note that males in particular are more avid readers of Espionage/Thriller, which may provide a crossover opportunity for mystery authors who may want to reach this segment.

Who are the top authors that they read?

In an open-ended question, we asked respondents what authors they read (not just mystery). While certain big name authors like James Patterson are popular among all age groups, we find some notable differences, such as the fact that Stieg Larsson ranks higher with the younger group and John Sandford and John Grisham barely register with them.

Top 15 for mystery readers under 50	Top 15 for mystery readers over 50
James Patterson	James Patterson
Janet Evanovich	John Sandford
Stieg Larsson	Patricia Cornwell
Michael Connelly	Jonathan Kellerman
Mary Higgins Clark	Sue Grafton
Patricia Cornwell	David Baldacci
Stephen King	John Grisham
Agatha Christie	Stuart Woods
Dan Brown	Agatha Christie
Lisa Gardner	Mary Higgins Clark
Dean Koontz	Michael Connelly
David Baldacci	Nora Roberts
Sue Grafton	Janet Evanovich
Jonathan Kellerman	Robert B Parker
Nora Roberts	Dean Koontz

What Reading-Related Activities Do Mystery Readers Enjoy?

The following table shows the percentage of each segment that participates in the activities we listed in the survey.

	Total	Male	Female	under 30	30's	40's	50's	60 plus
Participate in discussions (on-line or otherwise) about mysteries	10%	6%	11%	16%	7%	12%	10%	8%
Offer feedback on mysteries to others (on blogs, Facebook, etc.)	7%	4%	9%	*17%*	*12%*	9%	8%	4%
Search for new mystery authors to read	63%	63%	62%	49%	68%	65%	61%	64%
Involve myself in a community associated with mystery readers	2%	1%	2%	5%	*7%*	3%	2%	0%
Attend author events at stores	7%	6%	7%	8%	8%	7%	*10%*	5%
Attend author events at libraries	4%	3%	5%	3%	8%	5%	5%	3%

Across all age segments, readers are likely to be searching for new authors to read. Notice that those under 40 are more likely to be using feedback on social media and those in their 50's are more likely than others to appear at an author event. By far the most common other activity listed is "discussions of the book with family or friends."

What are the most important elements in a mystery?
In the table below, respondents share which elements are very or extremely important in a mystery. Readers under the age of 30 clearly have a preference for "dark" stories, while those in their 50's and 60's are more likely to rate author and characters as most important elements. Female readers under 30 are also more likely to want a romantic element to the story.

	Total	Male	Female	Under 30	30's	40's	50's	60+
Favorite author	75%	72%	76%	21%	65%	76%	73%	79%
Know character from prior books	57%	56%	57%	29%	39%	54%	51%	67%
Dark/Suspenseful	39%	37%	41%	49%	51%	46%	40%	34%
Historical setting	21%	24%	19%	22%	30%	21%	23%	19%
Story location	18%	18%	18%	24%	26%	18%	18%	18%
Humorous	14%	11%	15%	14%	18%	17%	13%	12%
Romantic element	14%	8%	17%	28%	19%	17%	11%	11%
Saw the movie	8%	10%	7%	13%	8%	8%	7%	8%

What Do You Like Best About Reading Mystery?

The following are some quotes from respondents describing what they like about reading mystery. These, and other comments like them, reveal that there is something about mystery writing that, in addition to getting to know the characters (which is largely true for most fiction), provides a unique entertainment role by appealing to people's interest in solving a puzzle.
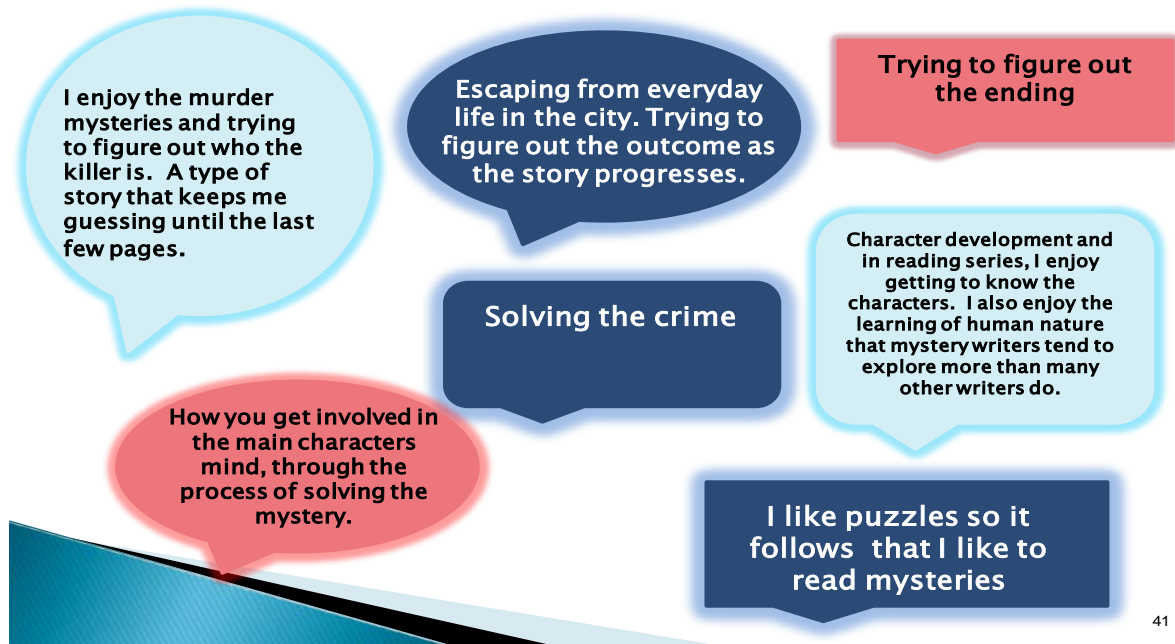

Are Mystery Readers Willing To Try New Authors?

Mystery readers are markedly more open to new authors than most other readers, and they actively seek new books. Readers over 60 are more loyal to the writers they prefer, and are somewhat less willing to try out new authors without some assurance from reviews or other sources that the author is worth trying. Readers in their 30's and 40's are very willing to try new authors.

Figure 26. Openness to new authors
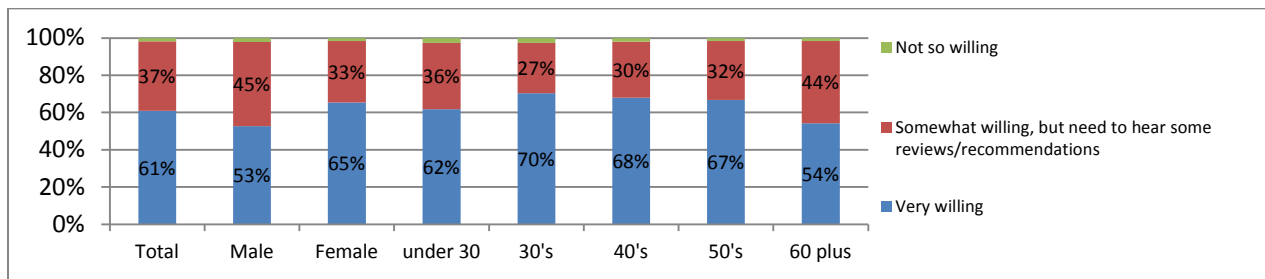
Does it matter if the author is a man or a woman?

According to the following chart, the author's gender matters much less to women. Men tend to be more likely to read a male author and less likely to read a female author, but the good news is that even large majorities of men say that it doesn't matter.

Figure 27. Preference of Author Gender

If the author is a MAN

If the author is a WOMAN

45
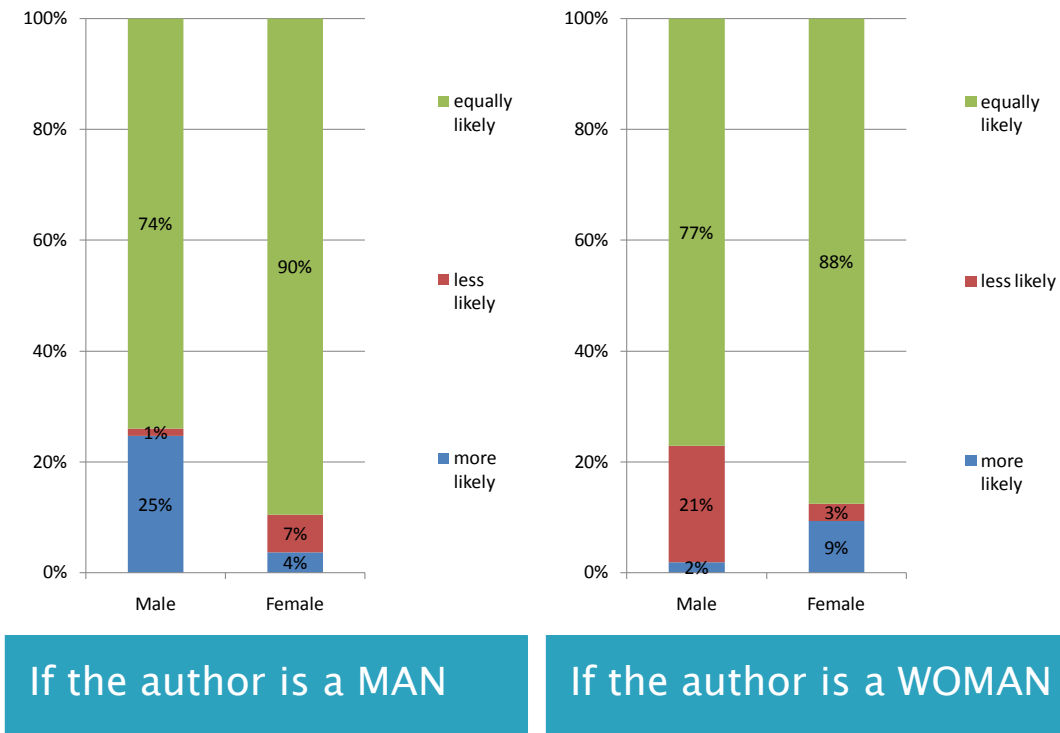
Is mystery distinct from other genres?

Unlike mystery readers over 50, mystery readers under 50 do not have a strong sense of how mystery differs from other genres. Close to half of those under 50 do not distinguish between mystery, thriller, espionage or suspense genres

Figure 28. Is mystery distinct from other fiction?
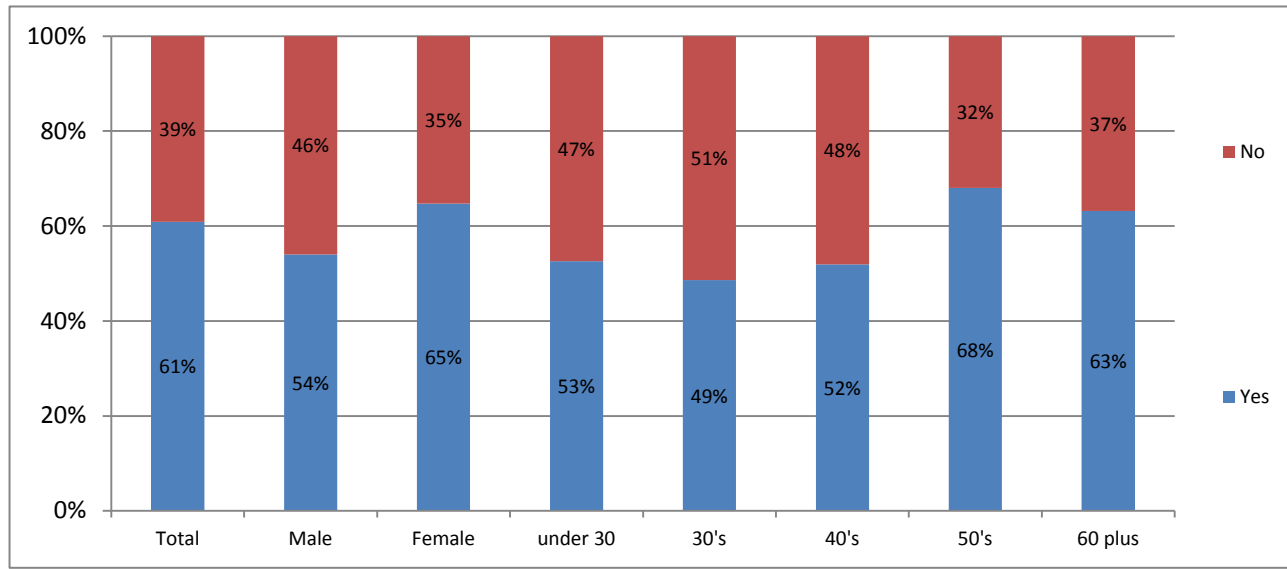
Some of what sets mystery apart comes right from the respondents themselves, and some of these direct quotes are highlighted below:

What sets Mystery apart?

They can be relaxing, entertaining, puzzling, complex, tension filled, scary. They are a reflection of human nature they are escapism. I particularly enjoy characters evolve and it allows me to use my imagination..

Suspense, Surprise

Cannot wait to see what happens or who did it

There is more suspense in mystery fiction than other forms. Usually some twist that is not clear from the beginning of the story. So the story builds and builds to a conclusion that you don't necessarily see coming

Thrills, Twists and Turns, Intrigue

Trying to Solve the Puzzle

I enjoy any type of novel that can surprise me. While reading "Thirteen Steps Down" by Ruth Rendell I actually dropped the book, I was so startled. Love those twists and turns!

42

The following table shows the reading-related activities of mystery readers:

	Total	Male	Female	under 40	40's	50's	60 plus
Provide feedback to an online forum/blog on a title I'm reading	7%	6%	8%	19%	10%	9%	2%
Local mystery discussion group (in person)	6%	4%	8%	7%	7%	7%	5%
Online mystery discussion group	5%	4%	5%	14%	7%	6%	1%
Participate in an author fan organization	3%	3%	3%	7%	5%	4%	1%
Participate in an Amazon discussion group	3%	3%	3%	7%	4%	2%	2%
Mystery discussion group associated with a specific author	3%	3%	3%	5%	2%	4%	2%
A large online mystery reader forum like dorothyL or 4 Mystery Addicts	3%	4%	2%	3%	2%	5%	2%
Mystery discussion group on Facebook	2%	1%	3%	7%	3%	2%	1%

Note that the percentages may be disappointingly low. Many, especially those in their 50's and 60's, said "none" or that reading is a "private" activity. Many said they informally talk with friends and relatives.

The kernel of interest here is that those under 40 are more likely to develop a social component to their mystery reading, while older readers are more passive and less likely to join groups.

What we learned in Section 4:

- ***Mystery readers over 50 read many more books than younger readers.***
- ***Younger readers are looking for darker or more suspenseful stories.***
- ***Knowing the author and liking the main character are important elements to readers.***
- ***Mystery readers are very open to finding new authors.***
- ***Men are more likely to read mysteries written by men.***
- ***Readers like to solve puzzles and love surprises, thrills, and suspense.***
- ***Men who read mystery also enjoy reading espionage and history.***
- ***33% of mystery readers also read literary fiction.***
- ***Women under 30 enjoy romantic elements in their mysteries.***
- ***Only 14% of mystery readers read fantasy novels.***
- ***Only 7% of mystery readers also read religious fiction.***
- ***Readers under 40 enjoy the social aspects of reading groups, book clubs and social media, while older readers prefer to make reading a private, solitary activity.***

Section 5: e-books:

Given the press coverage about the explosive growth of e-books, Sisters in Crime was interested in learning how this manifests itself among mystery readers. Overall we see, as of September 2010, that e-books remain a smaller part of the market than many assume, but it is certainly growing and needs to be monitored. From Bowker's monthly tracker, only 1.7% of all books sold last year were e-books, but sales of e-books are 7% of all book sales in Q2 of 2010.

From the Sisters in Crime survey, we find that close to 90% of our sample has heard of e-books, but only 13% have ever read one. Mystery readers under 30 are slightly more likely to say they have read an e-book.

Figure 29. Percent who have read an e-book:
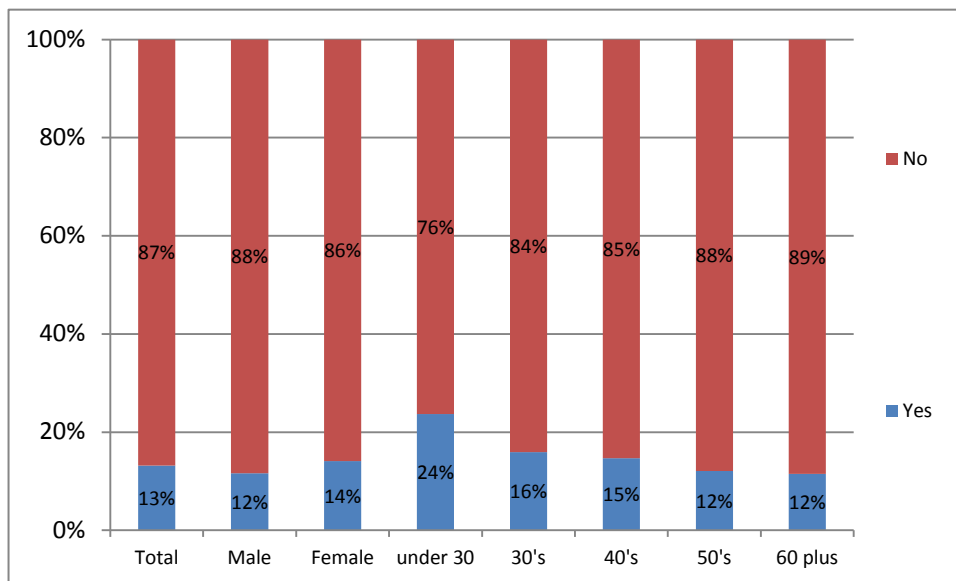
Of those saying "no" above, just over half are strongly against reading e-books, while about 40% are open to the idea of reading them. As shown in the following chart, openness to e-books declines with age.

Figure 30. Future Likelihood of Reading e-books
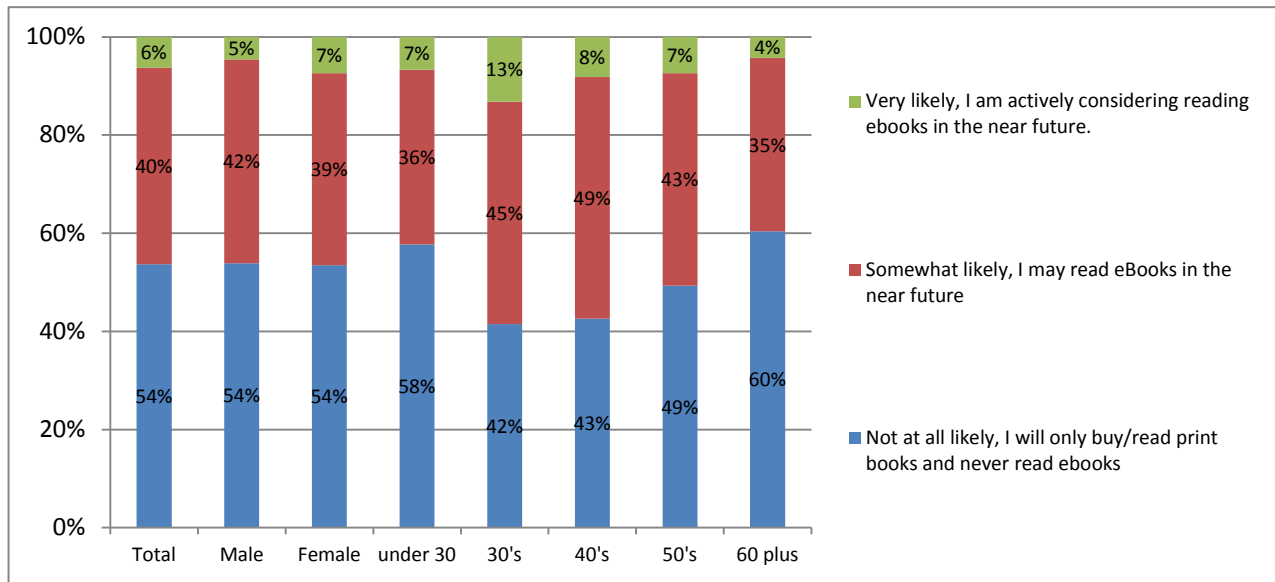
Of those who say they are "not at all likely to read e-books," the number one reason for not doing so is a simple preference for the experience of reading a print book and/or simply not seeing a need.

Figure 31. Reasons for Not Reading e-books:
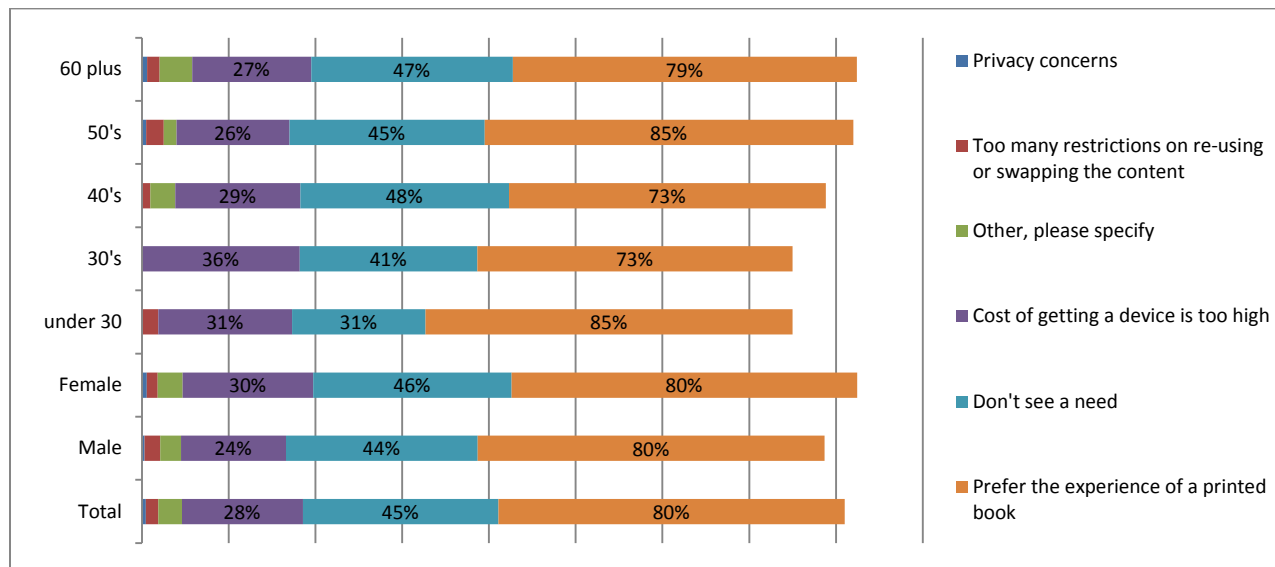
How Should E-books Be Priced For Mystery Readers?

We asked respondents to assume the mystery book that they like to read was priced at $24.99 hardcover, $12.99 for a paperback. For the e-book version of the book, we asked what price is

too high, high but reasonable, fair, and too low. We received the following average price point for each demographic segment:

	Total	Male	Female	under 30	30's	40's	50's	60 plus
Too Expensive	$ 15.58	$ 16.10	$ 15.30	$ 15.83	$ 17.53	$ 14.83	$ 15.85	$ 15.33
High, but within Reason	$ 12.56	$ 13.45	$ 12.07	$ 12.27	$ 14.68	$ 12.58	$ 12.48	$ 12.24
Fairest Price	$ 8.98	$ 9.90	$ 8.46	$ 8.50	$ 9.93	$ 9.08	$ 8.84	$ 8.91
Too Low; Would Doubt Quality	$ 3.41	$ 4.61	$ 2.74	$ 2.74	$ 4.43	$ 2.90	$ 3.25	$ 3.64

Generally, the fairest price for e-books is under $10, according to mystery readers.

This data should prove particularly valuable for those authors who may be considering self-publishing their work in e-book format.

E-book Trends Among Mystery Readers

As shown in the following chart, e-books as a percent of units purchased of mystery books grew to 7% in second quarter (Q2) while sales of hardcover books declined by approximately the same rate:

Figure 32. Mystery e-book metrics by quarter (Source: PubTrack Tracker) note that this measures mysteries not all books.
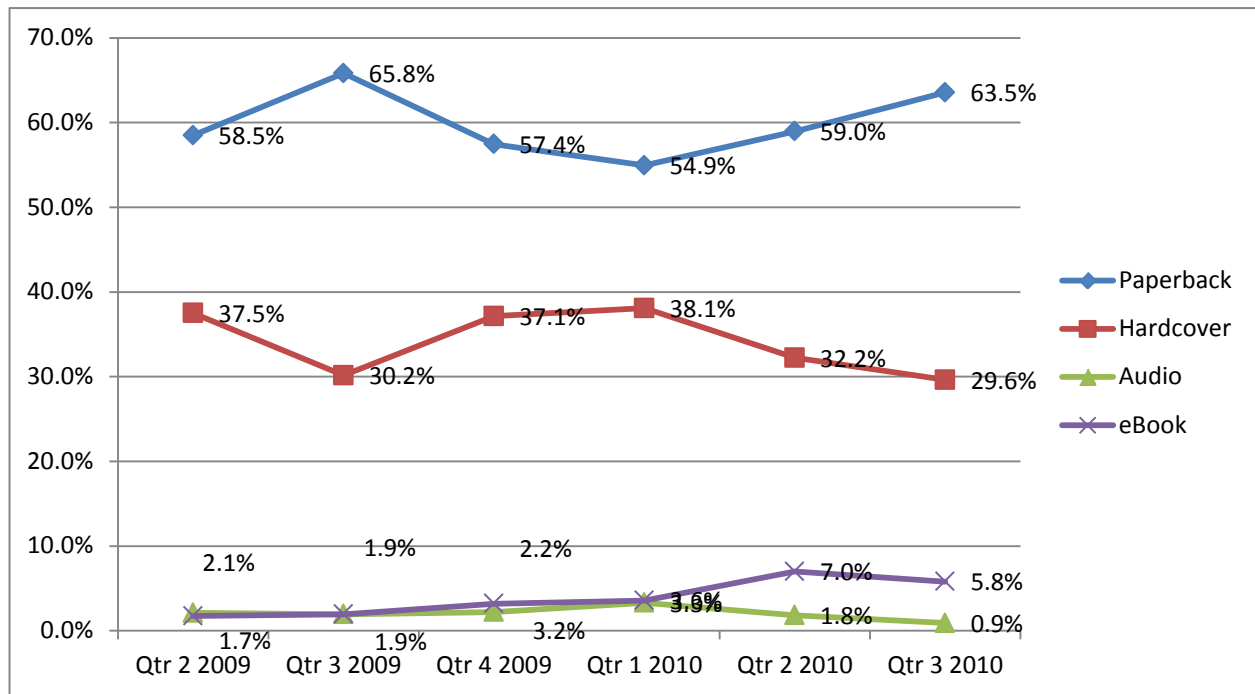

A closer look at the e-book segment shows that the top genres for e-books are shifting away from the dominance of academic and scientific/technical/medical (STM) as the fiction market increasingly adopts e-books, correlating largely to the availability of devices like the Kindle and

the Nook. In Q2, general fiction was the largest e-book category in terms of units, followed by romance (which had the number 1 spot in Q1), mystery, espionage, and young adult.

Figure 33. E-book genres based on units.
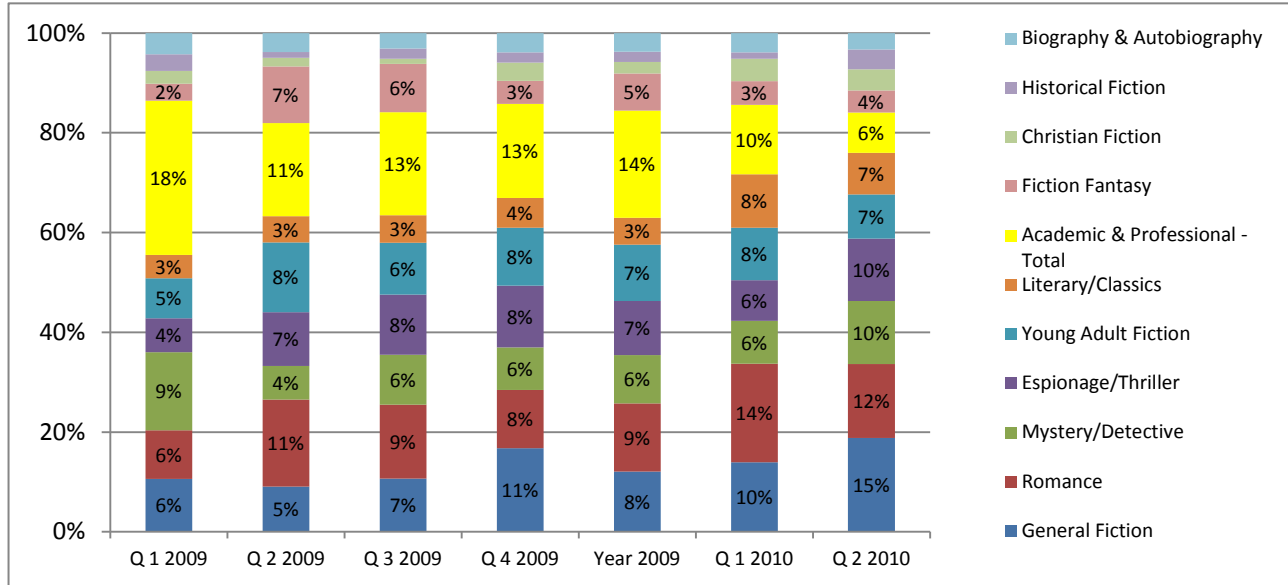
Does social media sell e-books?

Not yet: in a question about purchase and awareness of e-books, social media ranked # 32 out of a possible 53.

What We Learned in Section 5:

- *E-books are a small but growing segment of fiction overall and mystery in particular.*
- *Most (90%) of our sample have heard of e-books, but only 13% have actually read one, with a somewhat higher portion of those under 30 saying that they did.*
- *About half of mystery readers are dead-set against e-books, with people in their 30s and 40s somewhat more likely to be open to reading them in the future.*
- *The adoption of e-books by mystery readers needs to be closely monitored.*

In Conclusion:

The Mystery Book Consumer in the Digital Age is intended to provide authors and publishers with information to guide the sales and marketing of mystery novels to the general book-buying public.

The collected data suggests conventional wisdom still applies: Successful authors have become brand names that consumers recognize and seek. Covers attract and influence readers. Bestseller lists and reviews in traditional media create important author recognition. Prominent in-store placement results in sales. Familiarity with authors and their series characters encourages buyers to return to favorites. Blurbs by popular authors help create new authors.

Other findings: Book clubs, such as Mystery Guild, are popular with readers over 50. Libraries are still viable ways for authors to get a foothold among readers.

Authors and publishers should dig deep in the data, particularly in Section 3, to develop strategies for successful promotional efforts. For example, many currently popular methods of promotion — blogs, author mailings and publisher websites — appear to yield poor results. But if word-of-mouth still creates sales, can authors create valuable word-of-mouth by employing a selection of promotion efforts targeted at specific demographics? The data in this study suggests identifying readers by age, gender, and perhaps by regional sensibilities.

Since all the data from this study was collected as online marketing and e-books emerged as technologies with enormous sales potential, we plan to re-visit the same questions in the near future to track changes and progress.

Points to ponder:

- Crossover reading habits vary widely by age and gender, suggesting opportunities for targeted marketing: Men who read mystery also read the majority of espionage books. Men also tend to read history and science fiction/fantasy. Women mystery readers under the age of 30 tend to read romance, science fiction and fantasy. (These are sales which may reflect the popularity of Stephanie Meyer's *Twilight* series.) Mystery readers in their 30's also read literary fiction.

- James Patterson appears at the top of lists of popular authors cited by both younger and older readers, suggesting the frequency of publication may contribute to name recognition.

- Readers under 50 are more influenced by online marketing than older readers, who appear to be influenced by traditional media advertising. If an author defines her audience as "over 50," perhaps she can cut back on time and financial investment in social media with no significant loss of sales. But if an author is trying to reach a younger reader, she needs to be active and creative in reaching them in varied ways, including a Facebook presence.

- 35% of mystery readers live in the South. 48% of mystery buyers live in suburban areas. Can generalities be drawn about those populations and translate into creative elements in writing and marketing novels?

- "Face out" displays in some kinds of retail stores (Target, Wal-Mart, etc) cause buyers to be highly influenced by covers, not just the cover art, but elements such as title, author name, blurbs by other authors, and flap copy. Covers trigger impulse buys.

- Readers in their 40's buy more e-books than other age groups and cited the availability of e-books as an influence to buy more. Making e-book versions of novels available at the time of hardcover releases would encourage sales.

- Mystery buyers think a price under $10 is fair for an e-book.

- Mystery readers under 50 do not necessarily understand the distinction between the mystery genre and other kinds of fiction. Is this cause for concern? What sets mystery apart? Many readers are trying to solve a puzzle and relish the plot twists and turns that keep them guessing until the end. What explains this generational shift in perception and blurring of the lines?

- Many mystery readers cited reading groups as a reason to visit libraries and stores. More such groups may benefit the genre.

- Readers under 40 appear to be creating a change in reading habits. They are more likely to join discussion groups, more likely to engage in online social media, etc.

- Recommendations from librarians and booksellers seem to have more impact on mystery readers than readers of other genres.

- Libraries appear to provide a way for readers to try new authors without shelling out money, mitigating their risk. Other readers note they simply don't have the space to buy and store all the books they read. This means the library is a place that authors, especially new authors, should not overlook when attempting to connect with their readers.

Sisters in Crime welcomes discussion about the information collected for this study. Join Sisters in Crime to participate in more in-depth exploration of the data printed in these pages. Yearly dues are $40. Visit www.sistersincrime.org

Appendix 1: Methodology:

The Bowker PubTrack Monthly Tracker

PubTrack Consumer Data is derived from a nationally representative annual panel of more than 40,000 unique U.S. book buying men, women and teens. The same sample represents purchases of more than 118,000 unique book units. This resulting 2009 panel of over 42,000 is built by monthly recruiting of book buyers who complete surveys about their book purchasing behavior during the previous month as part of PubTrack™ Consumer, a service of RR Bowker LLC. Each month a minimum of 3,000 new buyers are recruited onto the panel in order to ensure a statistically valid and engaged sample of book buyers. This methodology is continuing in 2010.

Survey:

Type: Online
Sample: 3,000 Unique Book Buyers
Length: 75 questions
Frequency: Monthly
Rewards: ZoomPoints
2009/2010 Consumer Sample
> ‣ 64,826 US book buyers.
> ‣ Selected according to Age, Gender, Income, Household size, and location balanced to US Census.
> ‣ Representing a total view of 170,000 book purchases and 115,000 shopping occasions.

Project Partners:

Bowker PubTrack™ Consumer was primarily responsible for integrating questions posed in the survey instrument and using Bowker's vast Books-In-Print database, provided the bibliographic data associated with a respondent's book selection such as the title, author, binding (format) and genre.

MarketTools Inc. (MTI) was primarily responsible for survey deployment and survey sampling to ensure that responses were received from at least 3,000 monthly respondents who were part of a larger sample of U.S. adults over age 13 that is balanced to U.S. Census and who qualified as respondents to this survey as described in "Data Collection, Sample Size, and Margin of Error" above. MarketTools Inc. also loaded data into the Real-time Reporting tool for online access.

Management Science Associates (MSA) was primarily responsible for aggregating the respondent and book detail data (enhanced by the Bowker Books-In-Print database) into a tool set for cross-tabbing and analysis.

Panel:
- Comprised of males and females 13+ years of age.
- Semi-proprietary panel
- Participants may receive other surveys while receiving this book tracker survey, but they will NOT receive any surveys about publishing or book buying.

Sampling details:

The over 43,000 survey responses received in 2009 yield a margin of error between plus and minus 0.48% at a 95% confidence interval. In other words, if the same size sample were surveyed 100 times, it would produce the same results 95% of the time. According to standard industry best practices, this margin of error falls well within the limits prescribed for consumer-based surveying and analysis. More importantly, this sample makes analysis of specific segments possible at very low error margins. For example, for the sample of buyers who purchased Romance titles in 2009 (n = 3787), the margin of error is +/- 1.59% at a 95% confidence level.

Sample Size:

- 2009 & 2010: minimum of 3,000 book buyers per month.
- Each month the sample is new.
- 2009: 43,796 book buyers in sample.
- 2009: 118, 528 total books purchased.

Data Collection:

- Online Survey.
- Frequency: Monthly.
- Reported Monthly in RTR (Survey Respondent Reporting tool by MarketTools Inc.)
- Reported Quarterly in Insight (aggregated book detail database provided by MSA.)

Demography:

- All panelists have completed a comprehensive demographic profile (the "ID Survey") that is updated annually. Profiles can be customized to any client needs based on Census Demography for key variables such as:

  - Household Income
  - Household Size
  - Age and Gender of Respondent
  - Occupation of Respondent
  - Education Respondent
  - Census Region

- Other viewable profiles are based on the panelist's attitudes, opinions, usage habits for a variety of topics including:

  - Media Habits
  - Book Ownership
  - Reading Frequency
  - Social Network affiliation
  - Religious Affiliation and Worship Frequency

Panel Balance & Projection:

- Each month, all respondents are compared demographically to the U.S. population. The Panel sample is re-balanced in the projection process to represent U.S. census distributions of the 48 contiguous United States (population of 13+ yrs), based on age and gender; Census region; household income, household size, age & presence of children (<18 yrs or no kids); and education household head.

Bibliographic Classification:

All bibliographic classifications are based on Bowker's Books-in-Print™ (BIP). All records are matched to the BIP database by matching the reported ISBN and moving in the following bibliographic information for those records that match the dictionary:
- Category (based on publisher-provided BISAC classifications (normally the first – BISAC- 1.)
- Format/binding.
- Publisher.
- Recommended Retail Price.

Attempts are made to match all records with an invalid or missing ISBN to BIP. If no match can be made, bibliographic details are based on the panelists' perceptions (as filled in during survey process).

Publisher/Imprint Classification:

- Each general record with a valid ISBN is assigned a publisher/imprint code from Bowker's Publisher Authority Database (PAD). If the ISBN is invalid or not reported, attempts are made to map the publisher/imprint information based on the ISBN prefix.
- While Bowker believes that all aggregations are correct, we are not responsible for any errors or inaccuracies.

Information Collected:
To maximize compliance and minimize panel fatigue, details about specific details captured about each book purchased needed to be carefully managed.

Respondents report the total number of books bought during that month. It is this count that represents the total buying volume. Respondents then enter "core" details about the purchase for up to 20 books bought during the week (99% of total books reported). Core details included:

- ISBN
- Title
- Publisher
- Genre
- Format
- Where Purchased (outlet type & specific store name)

The survey then randomly selects four purchases to capture additional purchase related details (87% of total purchases.)

- Why purchased
- How purchased
- Intended recipient
- Other items purchased on shopping trip (market basket-light)

Remuneration / Incentive:

As compensation for their participation, respondents earn Zoompoints™ for each completed survey. Panelists may save their points and choose from a variety of offerings for merchandise or charitable donations based on their accrued point levels.