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UNDERSTANDING THE MIGRATION TO E-BOOKS

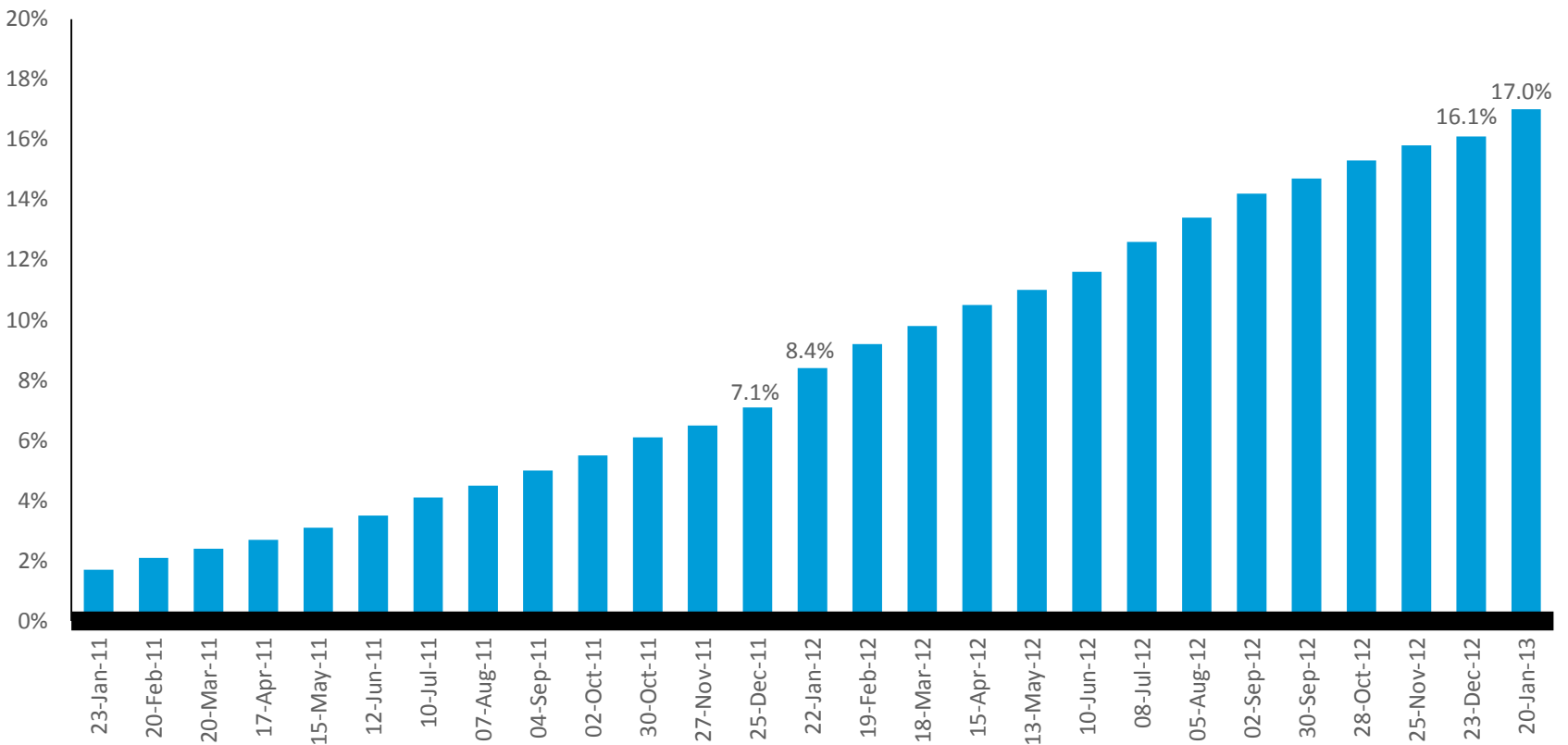
CURRENT AND FUTURE TRENDS

Andre Breedt
17 April 2013

DIGITAL CUMULATIVE PENETRATION

Market penetration in percentage terms

Percentage of the UK population aged 13-79 that have bought an e-book: 2011-2013

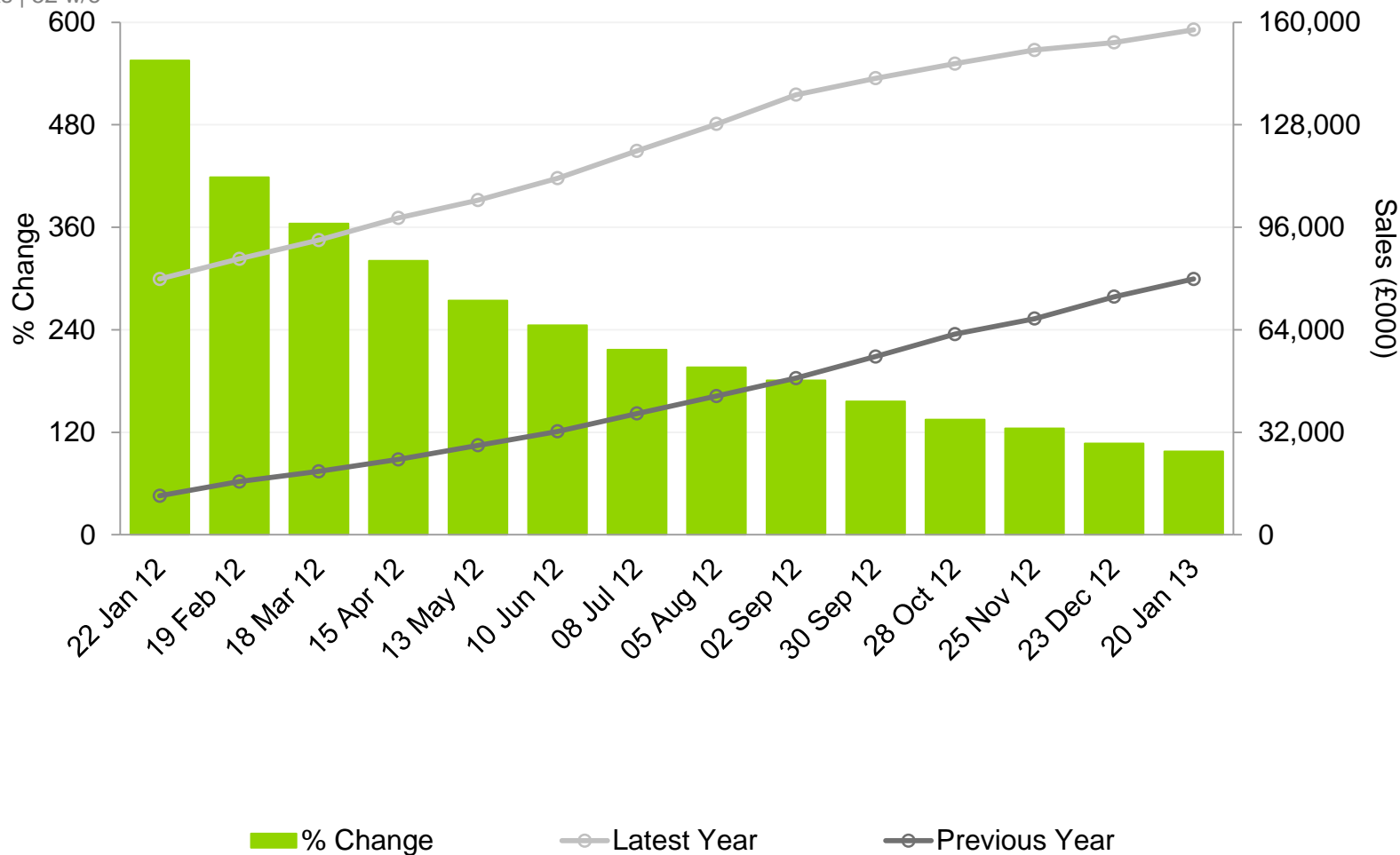


PERFORMANCE - TRENDED

UK - eBooks

eBooks

Total Books | 52 w/e

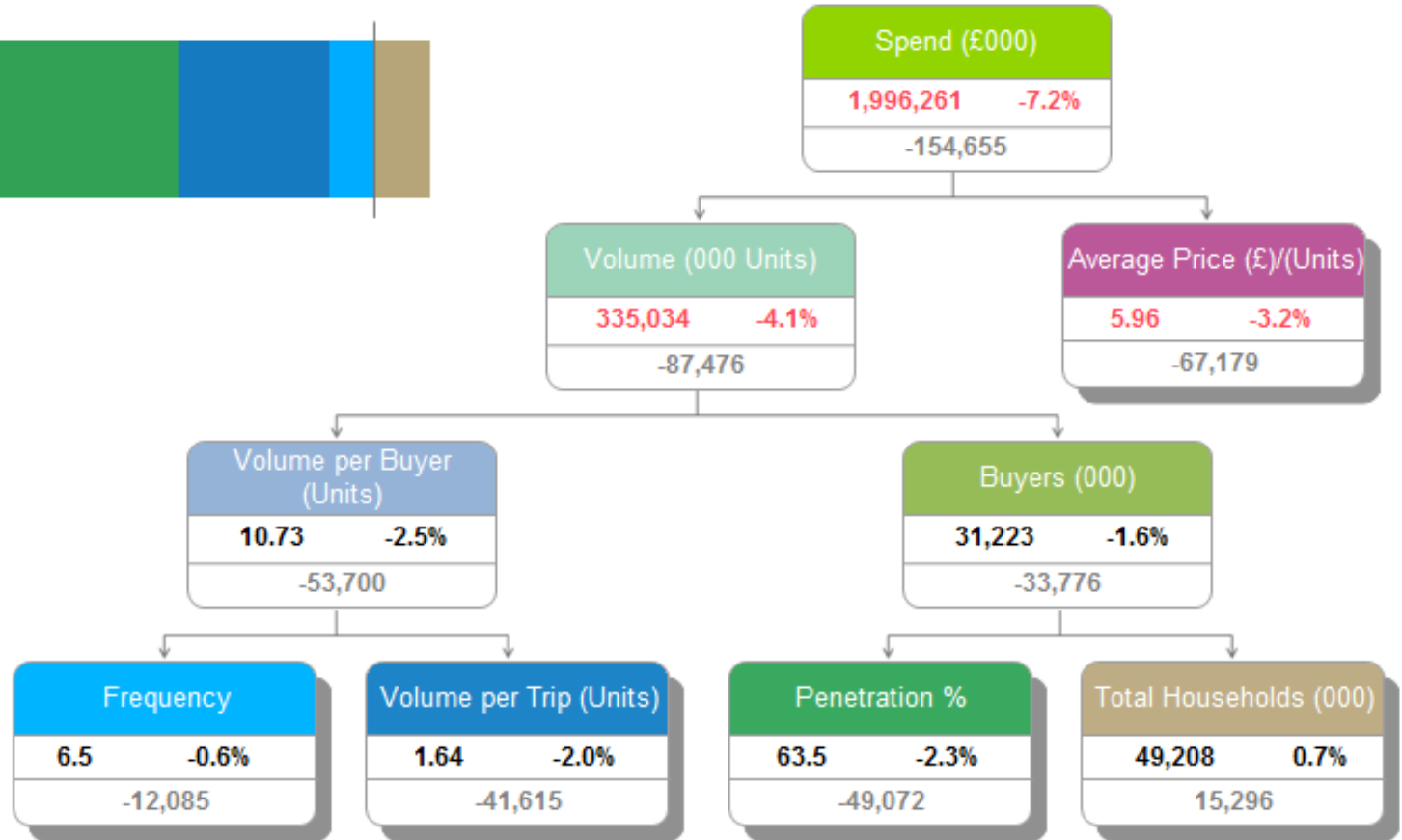


KEY MEASURES - MEASURE TREE

UK - TOTAL BOOKS

Total Books | TOTAL MARKET | Total Books | 52 w/e | 20-Jan-13

Attribution of Change in Spend



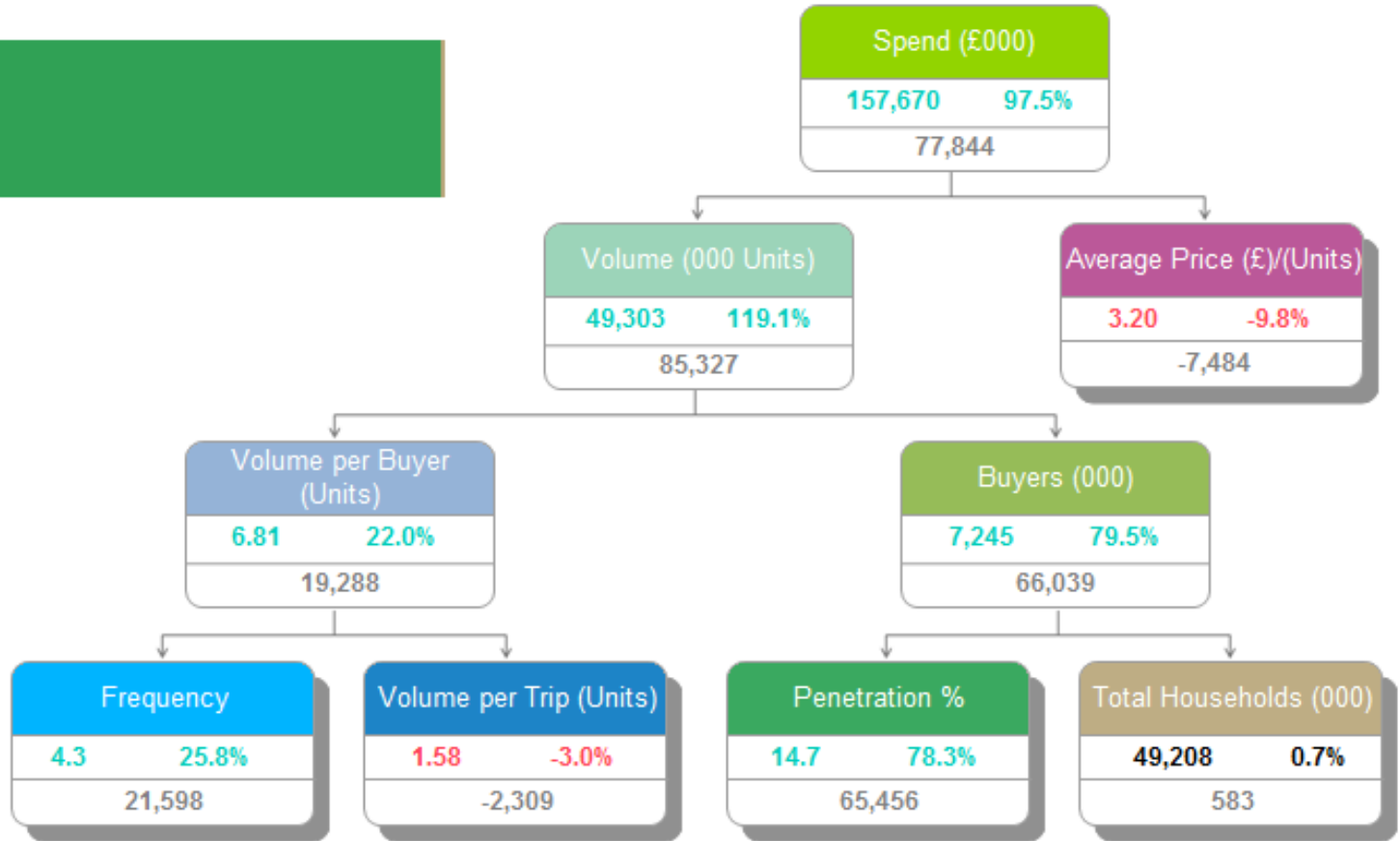
KEY
■ = > 3% Change
■ = < -3% Change

KEY MEASURES - MEASURE TREE

UK - TOTAL BOOKS

eBooks | TOTAL MARKET | Total Books | 52 w/e | 20-Jan-13

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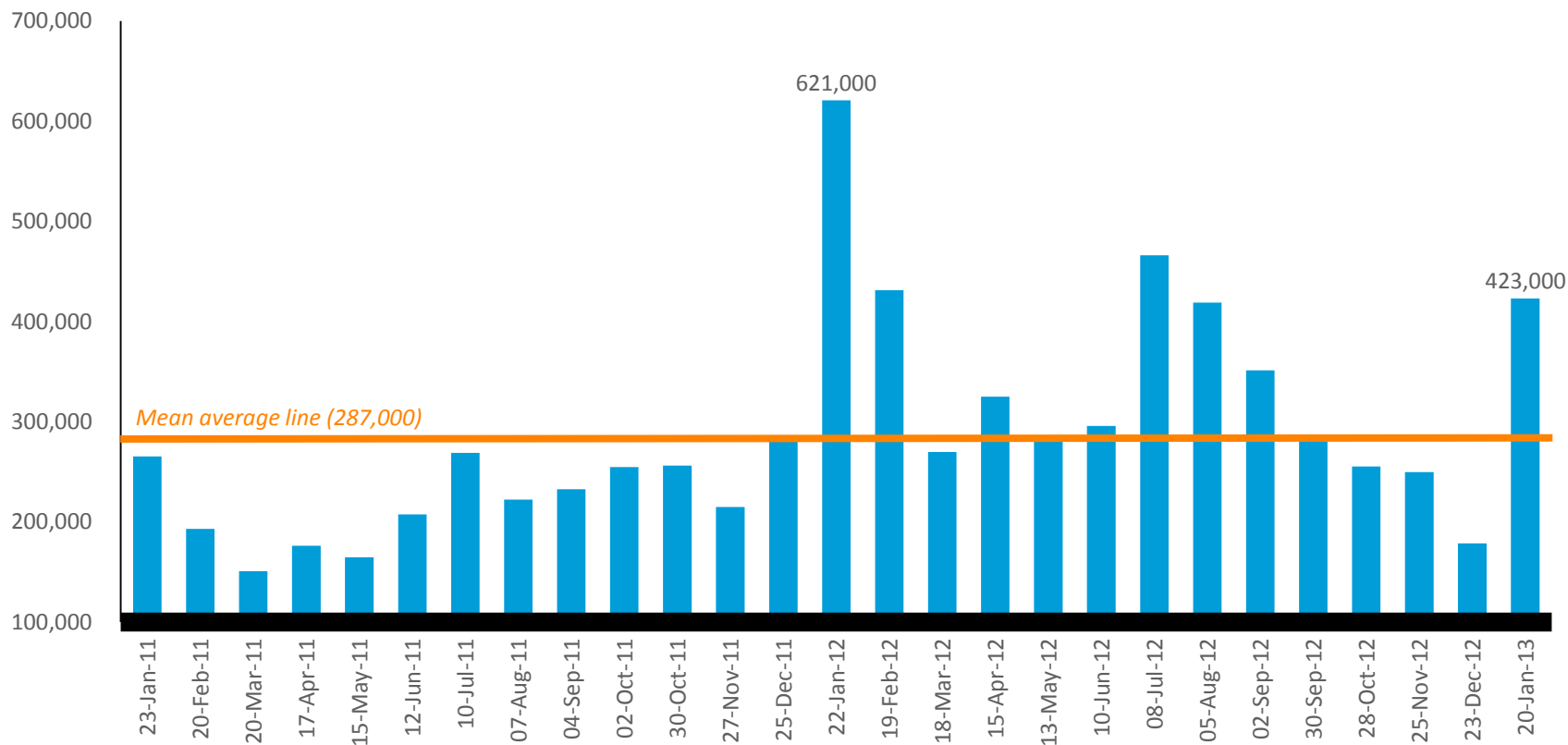


KEY
■ = > 3% Change
■ = < -3% Change

DIGITAL CUMULATIVE PENETRATION

E-book population increases per four-week period

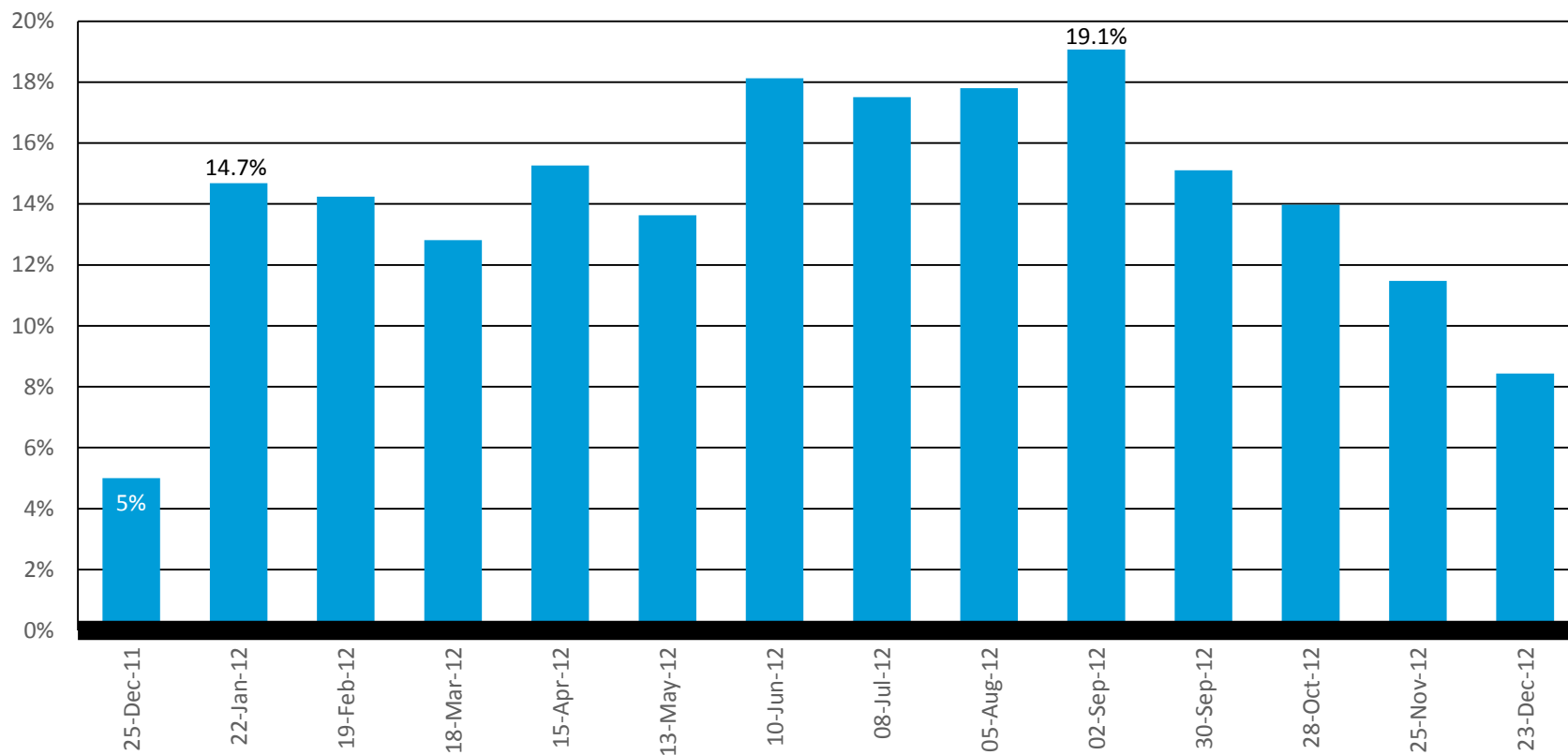
Numbers of individuals aged 13-79 entering the e-book market: period-on-period growth in population number terms



E-BOOK MARKET SHARE TREND

Period ending 22-Jan-12 to 23-Dec-12

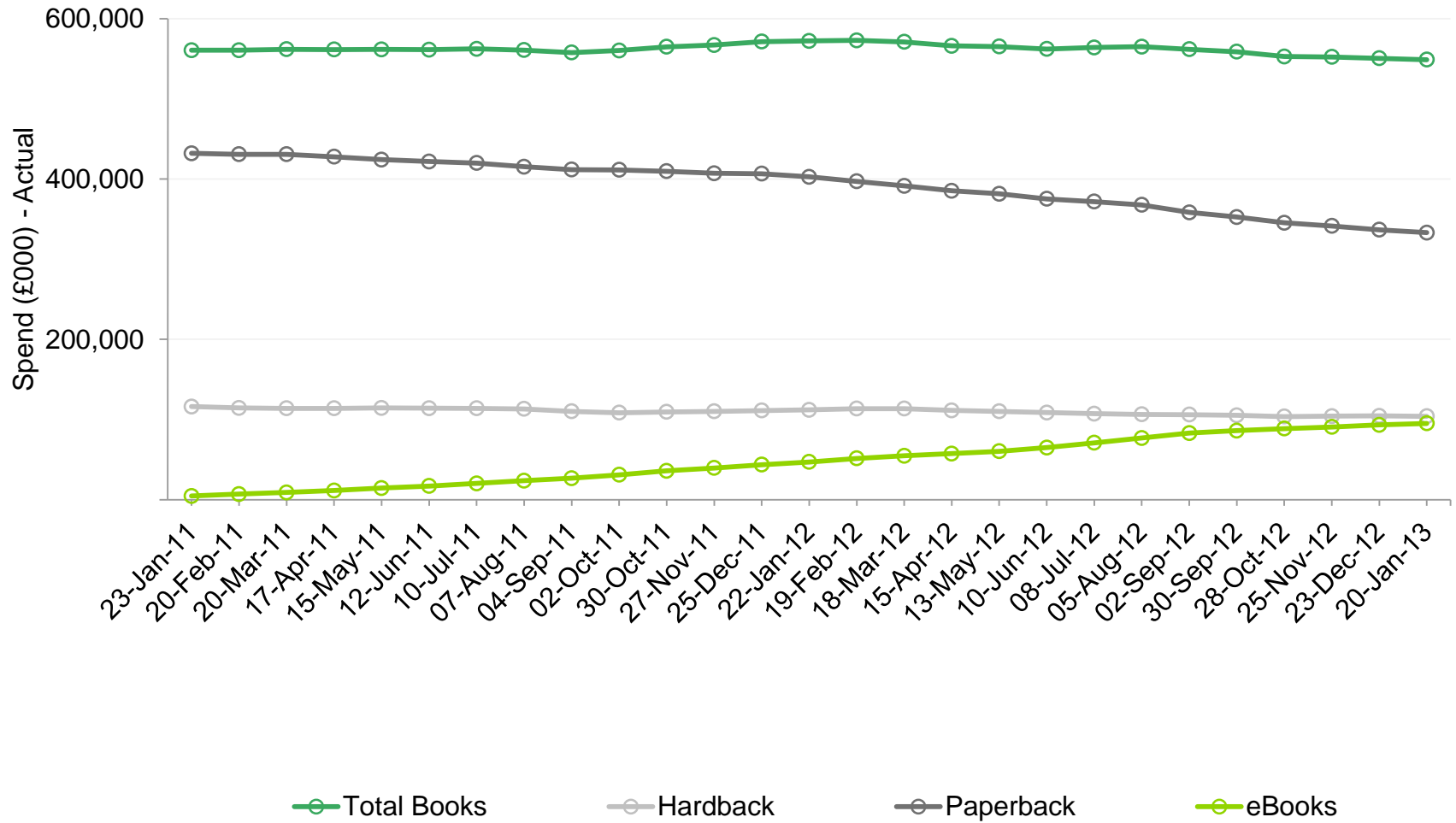
Market share of e-books in 2012 in volume sales percentage terms per four-week period



PRODUCTS - TRENDED

UK - TOTAL BOOKS

Spend (£000) | Actual | TOTAL MARKET | Books-Adult Fiction | 52 w/e

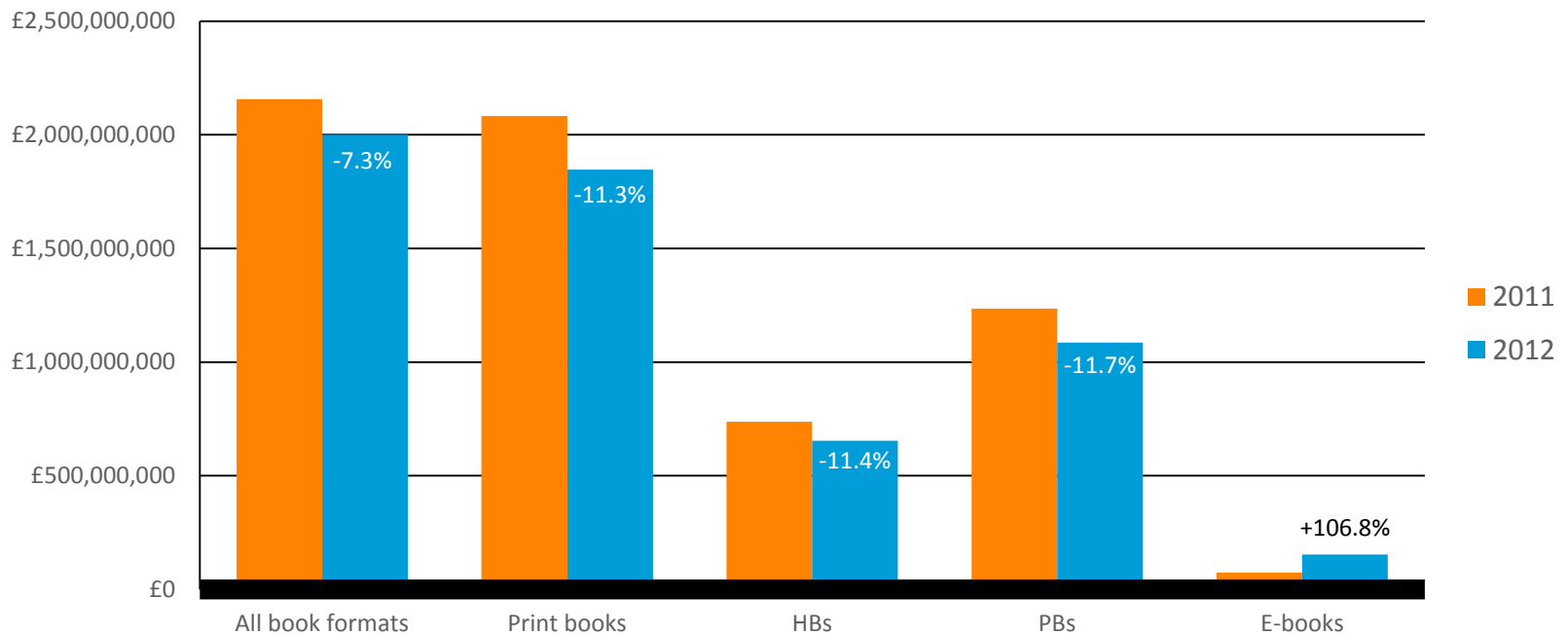


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2012 V 2011: TOP-LINE SALES ANALYSIS

52 weeks ending 23-Dec-12 versus 52 weeks ending 25-Dec-11

Year on year sales by VALUE





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