

# Canadians

## Reading Canadians:

### How interested are Canadians in reading Canadian content?



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# Methodology

This study is a part of The Canadian Book Consumer, a BookNet Canada initiative that tracks book-buying behaviour in Canada over a two-year period.

BookNet Canada partnered with PubTrack Consumer, a service of R.R. Bowker LLC, for data collection and processing. PubTrack Consumer utilized online market research firm MarketTools Inc. to collect data from a representative Canadian panel.

Respondents were English-speaking Canadian residents aged 18 years or older who purchased a minimum of one book, regardless of format, in the prior month. The panel included men and women from all regions of Canada.

A statistically valid panel was built through monthly recruiting of book buyers who completed the Canadian Book Consumer survey about their book-purchasing behaviour. Monthly data was then rolled into a quarterly panel with a minimum of 1,000 respondents. This panel, consisting of 1,005 participants in Q3, was queried for the present study between July and September 2012.

BookNet Canada conducted a custom survey comprised of Q3 panelists who participated in a larger Canadian Book Consumer 2012 survey. The goal was to learn respondents' perceptions and attitudes towards Canadian books, authors, and Canadian subject matter. The results present an opportunity to examine Canadians' knowledge of and interest in Canadian authors and subject matter, as well as the impressions that Canadians have about Canadian books. Findings were then compared to data from an equivalent consumer study published by the Association of Canadian Publishers in 2002.

## **The survey was comprised of seven questions:**

- Have you read a book by a Canadian author in the last year?
- Have you read a book about a Canadian subject in the last year?
- How interested are you in reading books by Canadian authors?
- How interested are you in reading books about Canadian subjects?
- Can you tell me the name of a Canadian author?
- What do you think of when you read the words "Canadian books"?
- Thinking generally about your impressions of books written by Canadian authors, how impressed would you say you are?

# Introduction

When Canadian book-buyers were asked for their impressions of reading Canadian books, answers spanned everything from “honest, straightforward writing” to “a little boring.” Many respondents quickly related Canadian books to required school reading and childhood trips to the library. Regardless of their initial response, people have strong feelings about the topic, and they either know their Canadian authors well or they have no idea who they are or how to find them.

The goal of this study is to review the attitudes and opinions of Canadian book-buyers when it comes to purchasing and reading books by Canadian authors or about Canadian subjects. Data collection took place over a three-month period, July through September 2012, which is the third quarter (Q3) of BookNet’s Canadian Book Consumer report. The Canadian Book Consumer study started in January 2012 and extends to December 2013.

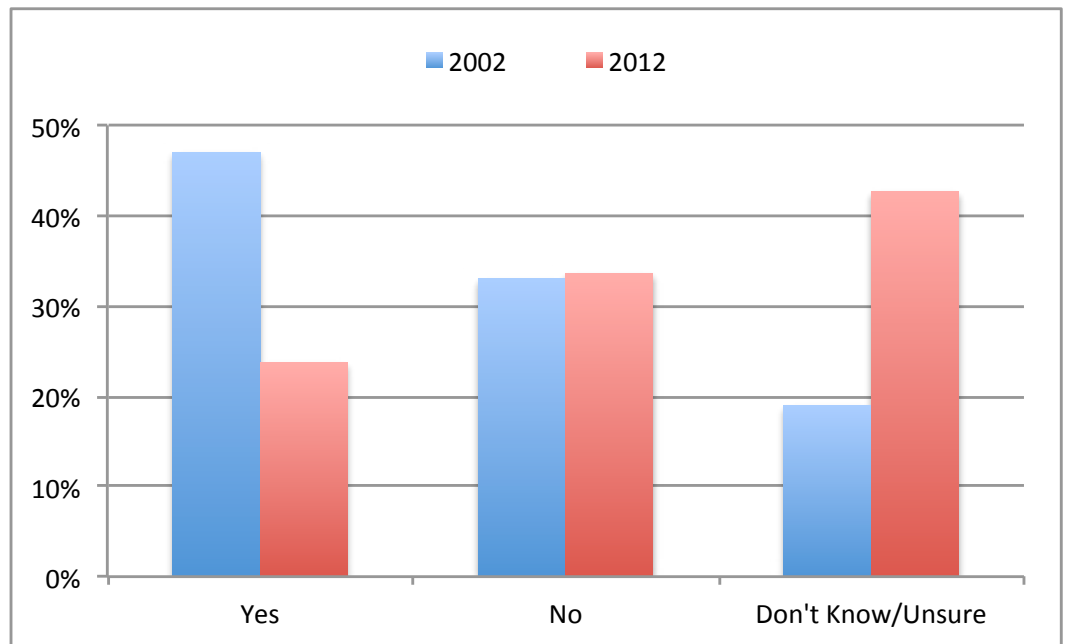
In 2002, the Association of Canadian Publishers released a consumer study titled “Canadian Book Buying Habits: What Influences Purchases?” BookNet Canada replicated the ACP study’s questions, creating the unique opportunity to measure how opinions have changed over this ten-year period. The ACP respondent pool was a similar size, 944 ACP participants as compared to 1,005 for the BookNet Canada survey, and all respondents had to have bought a book, regardless of format, in the month (three months in the case of the ACP study) prior to filling out the survey. Throughout this report we will refer to the ACP study where it provides a useful comparison to the 2012 data. We appreciate the support of the ACP in giving us permission to use their data.

# Who Is Reading Canadian Books?

**24%** of those polled said they had read a book by a Canadian author in the last year

It appears that most Canadians have not read a book by a Canadian author in the last year — or at least, they don't think they have. 24% of those polled said they had read a book by a Canadian author in the last year. 34% responded that they had not, and 43% weren't sure.

## HAVE YOU READ A CANADIAN AUTHOR IN THE LAST YEAR?

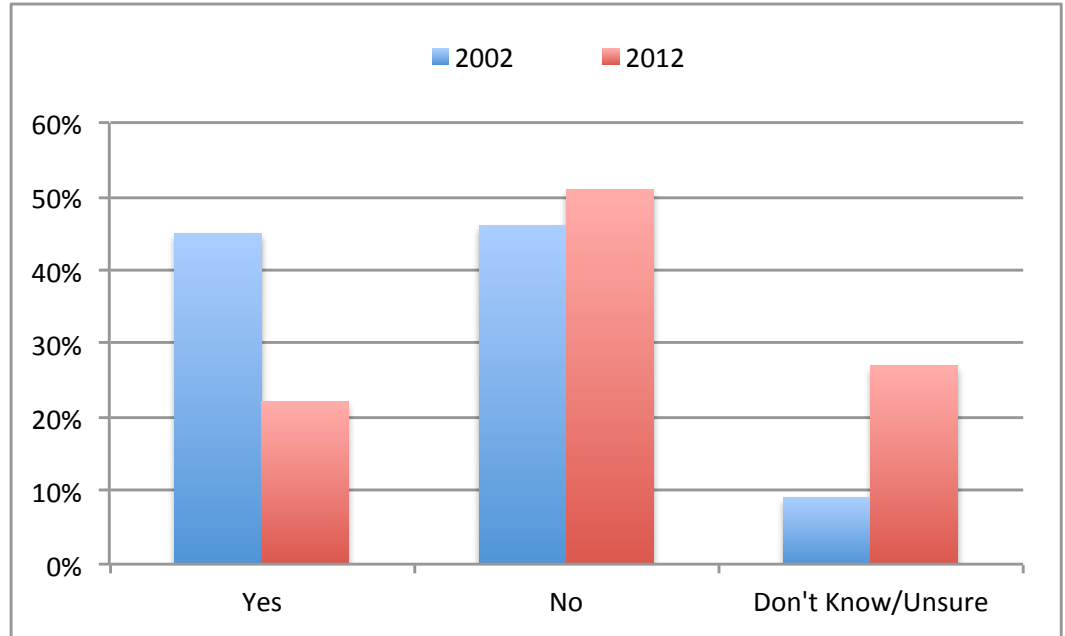


Question: Have you read a book by a Canadian author in the last year?  
(N=1005, ACP 2002 N=990)

There has been a significant decline over the past decade in those who say they have read a Canadian author — from 41% in 2002 to 24% in 2012. Some of this may be due to the fact that we also see a substantial increase in the number of people who do not know whether they are reading Canadian authors (19% in 2002 vs. 43% in 2012).

We see a similar trend over the past decade with Canadian subjects. Respondents were better able to identify Canadian subjects than Canadian authors, though 51% had not read a book on a Canadian subject this year.

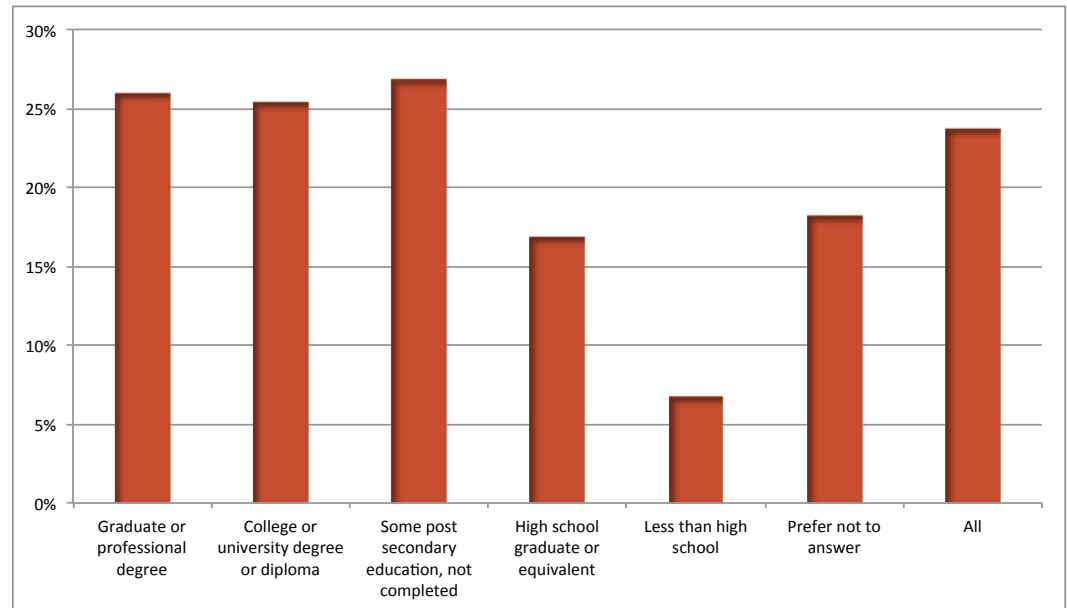
**HAVE YOU READ A BOOK ABOUT A CANADIAN SUBJECT IN THE LAST YEAR?**



Question: Have you read a book about a Canadian subject in the last year?  
(N= 1,005, ACP 2002 N=990)

Not surprisingly, education and income correlate highly with whether or not someone has read a book with a Canadian author or subject in the past year. Level of education was the most reliable predictor when it comes to reading books by Canadian authors. Respondents with a post-secondary education or higher were more likely to report having read a book by a Canadian author in the past year than those with less education.

HAVE YOU READ A BOOK BY A CANADIAN AUTHOR IN THE LAST YEAR?



Question: Have you read a book by a Canadian author in the last year?

Crosstab question: What is the highest level of education you have completed?

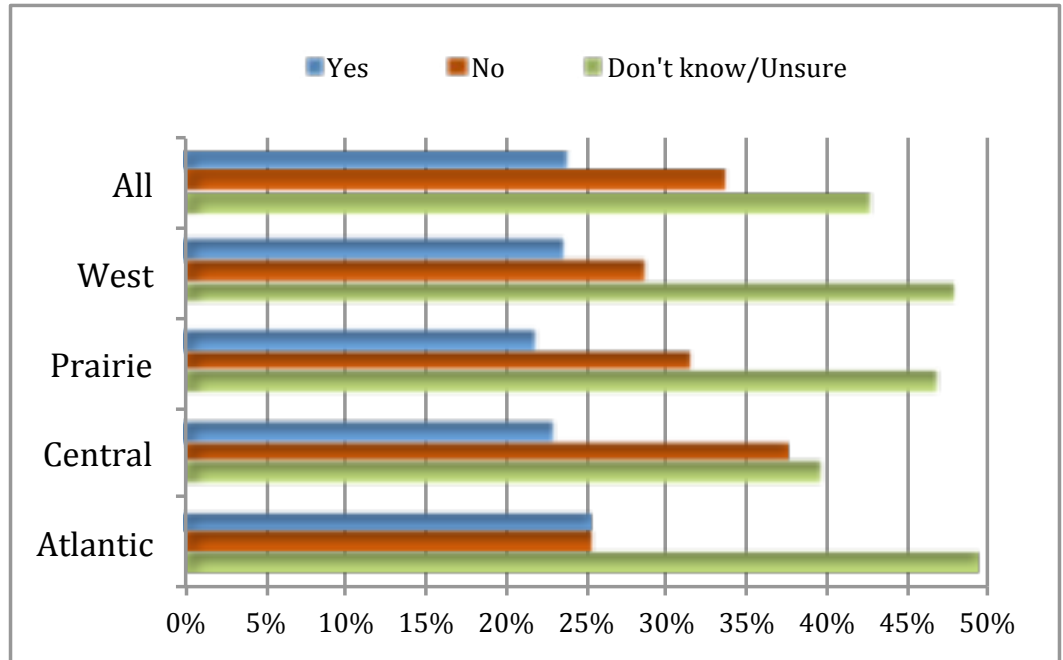
(N= 1,005, N=1,005)

Those who were most likely to have a Canadian-authored book had annual incomes of **\$150K** and over

Respondents whose household income fell between \$35K–\$74,999 were the least likely to have read a Canadian-authored book in the last year, at only 22%. Those who were most likely to have read a Canadian-authored book had annual incomes of \$150K and over. This is consistent with the 2002 ACP data, which found that buyers with an annual income bracket of \$55K–\$74K were least likely to have read a Canadian author in the past year, and those who brought in \$75K and above were the most likely.

Readership of Canadian books is fairly consistent across all regions of Canada. The east and west coasts had the highest percentages of Canadian book readers, with 25% and 24% respectively, while central Canada, comprised of Quebec and Ontario, represented the highest percentage of those who had not read a Canadian book, with 38%.

REGIONAL BREAKDOWN OF CANADIAN READERSHIP



Question: Have you read a book by a Canadian author in the last year? Crosstab question: Province/State of Residence?  
(N= 1,005, N=1,005)

It is interesting to note that respondents born outside of Canada showed a slightly higher aptitude for identifying Canadian authors than those born in Canada. The difference in who had read a Canadian book between the two groups was small, 3%, indicating that the majority of the difference was centered on how certain they were about what they were reading.

# Name That Author!

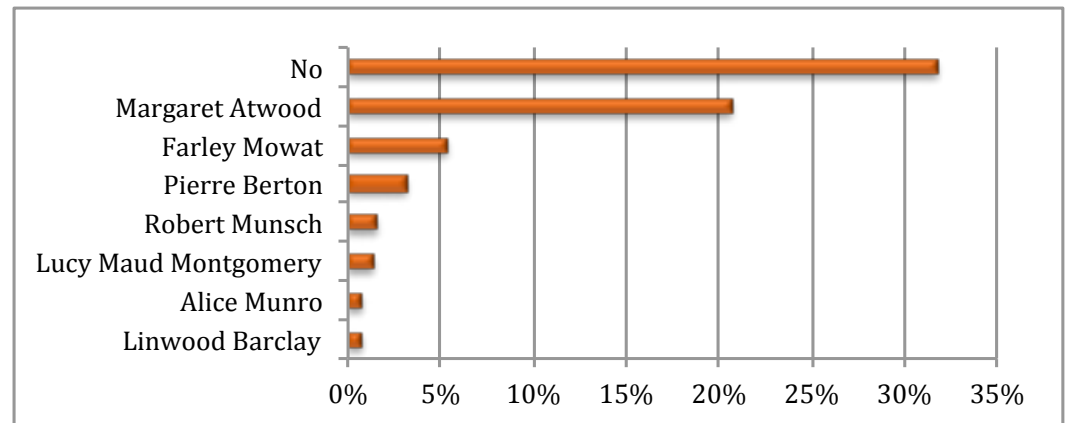
**69%** of  
respondents could  
name a  
Canadian author

Respondents may or may not have read a Canadian-authored book this year, but can they name a Canadian author? Yes, most respondents were able to name a Canadian author. In fact, there has been remarkable improvement in those who could name a Canadian author over the past decade (53% in 2002 vs. 69% in 2012).

This improvement could be due in part to the increased popularity of Margaret Atwood, who was named by 21% of respondents in 2012, up from 11% in 2002.

Many of the names recalled in 2002 were again brought up during the 2012 study, though a few names that ranked highly in 2002, such as Alistair MacLeod, Margaret Laurence, Mordecai Richler and Timothy Findley, were mentioned in smaller percentages in the current study. This may be due in part to the request that respondents only list one answer.

## MOST POPULAR NAMED CANADIAN AUTHORS



Question: Can you tell me the name of a Canadian author? [Open-Ended]  
(N= 1,005)

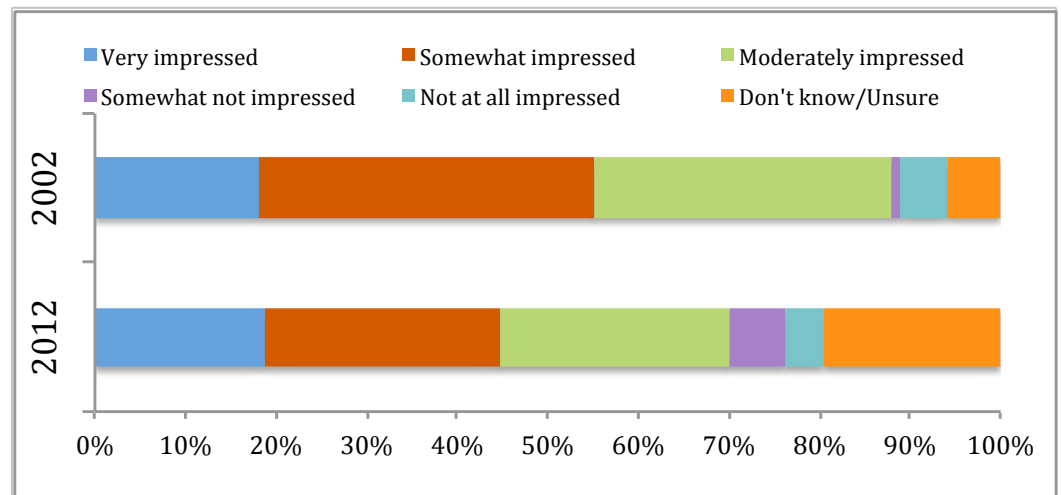
Some of the more humorous shout-outs from respondents included Robert Munchkin and Harper Collins. A few of those who were unable to name a Canadian author were apologetic, saying that they were sorry they were not able to do so. Apologizing in an anonymous survey — only in Canada.

# Perceptions Of Canadian Books

**70%**  
of consumers were  
impressed with  
Canadian authors

70% of book consumers were “moderately,” “somewhat,” or “very” impressed with Canadian authors. It seems that positive impressions of Canadian books have decreased slightly in the past 10 years, though this may be attributable to the increase in respondents who answered that they were unsure or didn’t know if they were reading Canadian books, reflecting issues of awareness for Canadian authorship rather than an overall perception of lower writing quality.

## IMPRESSION OF BOOKS WRITTEN BY CANADIAN AUTHORS



Question: Thinking generally about your impressions of books written by Canadian authors, how impressed would you say you are?  
(N= 1,005, ACP 2002 N=990)

To gain a better perspective on what Canadians were thinking, we asked respondents to tell us what they thought of when they read the words “Canadian books.” The question was open-ended, and those who answered were encouraged to be as specific as possible. The word cloud below was developed from the resulting responses.



On average, Canadian-authored books appear to have a list price of approximately \$3 more than those not authored by Canadians

Several respondents mentioned the expense of Canadian books, with some specifically citing the discrepancy between Canadian and US prices for a given book. Using data from BNC BiblioShare, we did a comparison of books published in 2012 that were marked as being authored by a Canadian and those that were not. On average, Canadian-authored books appear to have a list price of approximately \$3 more than those not authored by Canadians. In the general BNC consumer survey, however, we found that book buyers appear to be happy with what they are paying for books, with ratings predominantly being “excellent” or “good.” A 2012 study by the Canadian Publishers’ Council found that just over 80% of respondents believed that books were a good value for money,<sup>1</sup> which, as represented in the BookNet Canada study, has increased to 89% for the first six months of 2012.

Although it is not seen in the word cloud, it is interesting to note that approximately 2% of respondents specifically indicated that what came to mind when thinking about Canadian books was that they were difficult to find, pointing once more to a discoverability issue for Canadian books.

As always with open-ended questions, there were a few particularly humorous and insightful responses. Some of our favorites include: “undiscovered gems,” “Yesssssss,” “books you’d want to read when you’re up north at a cottage in the winter,” and “Books are books I really don’t care who wrote them unless it’s Louis L’Amour BEST AUTHOR EVER.”

<sup>1</sup> Canadian Publishers’ Council, *CPC Book Buyer Study*, January 2010, p. 39.

## Gauging Interest

We've taken a look at who is reading Canadian books and we have a general idea of how they feel about them, but how *interested* are Canadian consumers in reading Canadian books?

There is a strong correlation between the level of interest someone expresses in Canadian authors and how interested they are in Canadian subjects. Across categories of interest, there was a difference of only 1–3% between how interested people were in authors vs. subjects.

**76%** of respondents said that they are somewhat or very interested in reading Canadian-authored books

76% of respondents said that they are somewhat or very interested in reading Canadian-authored books, and 75% said that they were somewhat or very interested in Canadian subject matter. In June 2012, the Department of Canadian Heritage conducted an opinion survey on Canadian books, film, periodicals and music that found that 92% of respondents agreed it was important for Canadians to have access to Canadian books.<sup>2</sup>

Whether or not respondents were born in Canada appears to have little effect on how interested respondents are in reading Canadian authors and subjects, polling nearly identical results for all levels of interest. It is important to note that the majority of respondents (80%) were born in Canada.

<sup>2</sup> Department of Canadian Heritage, "Canadian Books, Film, Periodicals and Music Opinion Survey." September 2012, p.48. [http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/canadian\\_heritage/2012/090-11/index.html](http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/canadian_heritage/2012/090-11/index.html).

# Discoverability

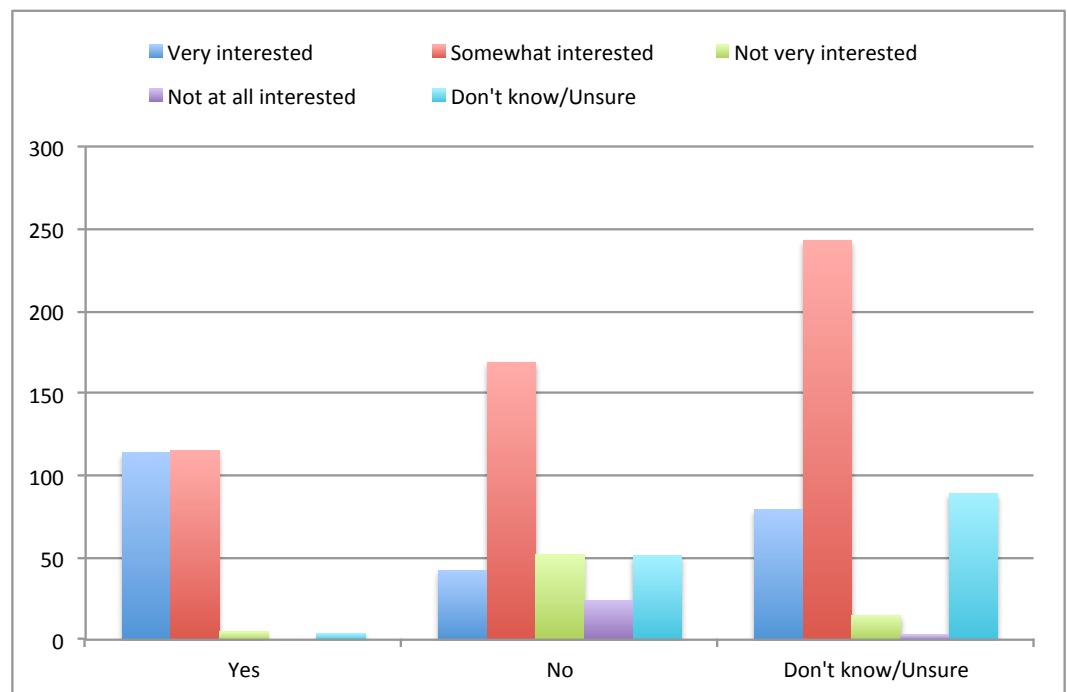
The fact that 43% of respondents don't know if they have read a Canadian author in the past year indicates that there may be an issue with discoverability, or awareness. If you are a reader and don't know any Canadian authors, where do you go for information?

**43%**

of respondents don't know if they have read a Canadian author in the past year

To dig into this further, we cross-tabulated the questions "How interested are you in reading books by Canadian authors?" and "Have you read a book by a Canadian author in the past year?" We found that 32% of these respondents are interested in reading Canadian authors but do not know if they have read a Canadian author in the past year. This information appears to point not to a lack of interest, but to a lack of awareness of who Canadian authors are, and perhaps a shortage of identifying information on products or retail displays (physical and online) that indicates Canadian authors.

## INTEREST IN READING CANADIAN AUTHORS COMPARED TO KNOWLEDGE OF CANADIAN AUTHORS READ



Question: How interested are you in reading books by Canadian authors?

Crosstab question: Have you read a book by a Canadian author in the last year?

(N= 1,005, N= 1,005)

Major online retailers do not list a Canadian flag associated with specific titles, offer Canadian search limiters, or provide any other indicators of Canadian authors or subjects. Some retailers do offer Canadian lists or a Canadian store. Many Canadian libraries indicate Canadian content by a flag on the spine of the physical book but do not provide this as a filter or indicator on their websites.

Websites such as 49th Shelf (49thshelf.com) feature Canadian books, and readers are able to find Canadian bestseller lists in sources such as *The Globe and Mail*.

While the Department of Canadian Heritage found that their survey respondents feel it is important to have access to Canadian books, they also found that 78% believe it is easy to find books written by Canadians and 89% feel it is easy to find non-Canadian authors. While many likely know they can go and ask a local librarian for assistance, our data may indicate that, when it comes to awareness of Canadian authors, this is a more complicated task.

From April 2011 to  
December 2012 we  
have seen an increase  
of **53%** in the  
use of the Canadian  
contributor field

For a number of years, BookNet Canada has been developing BNC BiblioShare, a bibliographic database that aggregates and disseminates information to the Canadian book supply-chain. One of the data points that is handled in the ONIX records is the country indicator in the contributor composite – basically a way that publishers can indicate that their work has a Canadian contributor (contributor may extend to author, illustrator or other type of contributor). From April 2011 to December 2012 we have seen an increase of 53% in the use of the Canadian contributor field. Whether it is to flag a Canadian author or to be considered as part of a Canadian bestseller list, publishers appear to be increasingly aware of the importance of promoting and marketing Canadian content.

# Indicating Regional Themes In ONIX Files

BISAC subject codes<sup>3</sup> are the North American standard that publishers use to identify to retailers into which section of their stores a book might be placed. The best practice for ONIX is to list one “main” subject, and then as many others as are needed to supplement it. For example, a book of photographs of then-and-now battle sites might be considered primarily a book of history, photography or possibly even travel depending on the book’s slant. The publisher identifies what the main subject is, then supplements it appropriately.

To provide additional help to retailers in identifying books of specific interest, BISAC has also established merchandising codes, which are not often used in Canada, and a system to identify regional themes.<sup>4</sup> Canadian retailers and 49th Shelf have identified this data as something of interest to them.

At the moment, the formal list identifies provinces and a very limited number of cities and sub-regions, but further refinement is possible. Like BISAC subjects, the regional themes should be supported by actual published books. This allows greater flexibility, as the theme can be as loosely geographical as the Canadian Rockies (which is an available theme), and has the potential to be as specific as a Montreal neighbourhood (though no one has proposed one yet). It’s just a matter of enough books being published about a regional subject to make it a viable theme.

A regional theme is intended to refer to the book’s content (there are separate means in ONIX to identify the author’s home town) and should be used to highlight a book for:

- Appropriate sales representatives;
- Regional purchase by booksellers and chain buyers;
- Cataloging considerations and regional librarians;
- Regional promotions and media.

The point of the regional theme is not to limit national sales, but rather to highlight regional opportunities.

3 “Classification Schemes (including BISAC Subjects),” Book Industry Study Group, <http://www.bisg.org/what-we-do-cat-20-classification-schemes-including-bisac-subjects.php>.

4 “BISAC Regional Themes (version 1.1),” Book Industry Study Group, <http://www.bisg.org/what-we-do-20-10-bisac-regional-themes-version-11.php>.

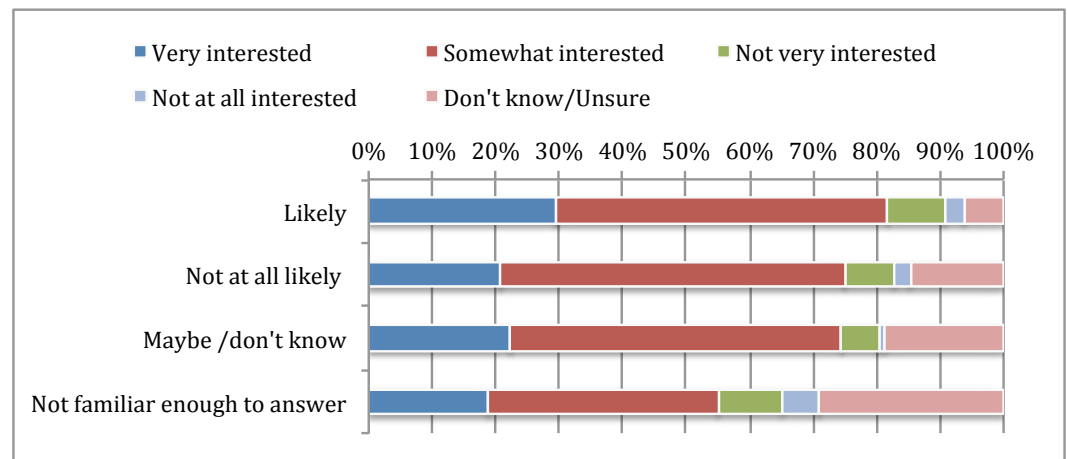
# Digital Content

**21%**

of respondents who are interested in reading Canadian books are likely to buy an e-reader in the next month

For those who are interested in reading Canadian content, what format will consumers most likely want to read it in? We are seeing a comparable demand in Canadian book buyers who are interested in purchasing e-reading devices. In Q3 2012 we found that 10% of respondents were very likely to purchase an e-book reading device, and we are also seeing a strong correlation between those who expressed interest in reading Canadian-authored books and those who have indicated that they were very likely to purchase an e-reader. The graph below indicates that 21% of respondents who are interested in reading Canadian books are likely to buy an e-reader in the next month. Of this 21%, 9% are “very likely” to purchase an e-reader.

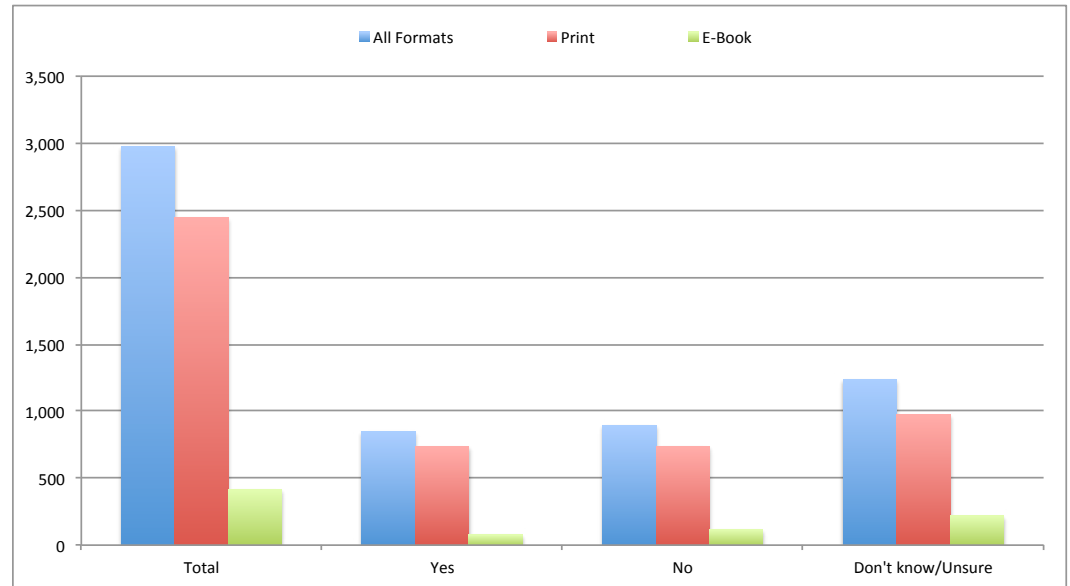
## LIKELIHOOD OF BUYING AN E-READING DEVICE COMPARED TO INTEREST IN READING CANADIAN AUTHORS



Question: How likely are you to buy an electronic device for reading (such as Kobo, Kindle, Sony e-reader, etc.) over the next month?  
Crosstab question: Thinking generally about your impressions of books written by Canadian authors, how impressed would you say you are?  
(Q1 N= 1,005, Q2 N= 1,005)

We reviewed whether there was any correlation between the format that consumers are reading and whether or not they have read a Canadian-authored book in the last year. Of the 15% of respondents that used an e-reader over the past year, 19% had read a Canadian author, 48% were unsure, and 32% had not. For those who are unsure about whether they have read a Canadian book this is higher than the average of 43%. This, again, may indicate that there are increased discoverability issues around Canadian e-books.

READERSHIP OF CANADIAN-AUTHORED TITLES BY FORMAT



Question: Have you read a book by a Canadian author in the last year?

Crosstab Question: Please indicate the format of this book.

(N= 1,005, Total responses = 2,973)

## Conclusion

Canada has a rich history of authors. Canadian literary prizes such as the Scotiabank Giller Prize, the Governor General's Literary Awards and Canada Reads often result in a large spike in sales for nominated and winning titles, demonstrating a tremendous appetite for Canadian content. The Department of Canadian Heritage found that 76% of respondents said they are interested in reading Canadian-authored books, and 75% said that they were interested in Canadian subject matter.<sup>5</sup> Furthermore, between 2008 and 2012 there was a 26% increase in how respondents felt about the importance of Canadian books. In 2012, 64% of respondents felt that it is important to have access to Canadian books.<sup>6</sup>

The fact that close to half of our respondents don't know if they have read a Canadian author in the past year indicates that work may be needed in other areas; specifically improvements to discoverability and making it easier for readers to find Canadian content.

Our challenge to publishers is to make sure you are supplying the country indicator in the contributor composite of your ONIX files, actively promoting the fact that your work is Canadian. Further information on how to do this can be found on the BookNet Canada website.<sup>7</sup> When the Canadian indicator is used in databases such as BNC BiblioShare, this flags content for specific use by websites such as 49th Shelf, and provides guidance for Canadian bestseller lists. It also makes the data available to retailers, libraries and bloggers to further aid in the discovery of Canadian content.

<sup>5</sup> Department of Canadian Heritage, "Canadian Books, Film, Periodicals and Music Opinion Survey," p. 48.

<sup>6</sup> Ibid., p. 54.

<sup>7</sup> "Identifying Canadian Authorship," BookNet Canada, <https://booknetcanada.onconfluence.com/display/UserDocs/Identifying+Canadian+Authorship>.

For retailers, whether print or online, we encourage you to take stock of how accessible Canadian content is within your store. Are users able to limit searches by Canadian content? Does a Canadian flag or other indicator highlight Canadian titles? Give consideration to how consumers may be able to better find both national and regional titles.

Canadians are telling us that they want to read Canadian authors and about Canadian subjects. Whether we are talking about libraries, publishers or retailers, we should do all we can to make this information as accessible as possible. Rich ONIX data that flags Canadian contributors and identifies regional themes is an excellent first step, and the most efficient way to immediately communicate this information to retailers and the Canadian readers who are looking for Canadian content.

# Acknowledgements

## ABOUT BOOKNET CANADA

BookNet Canada is the not-for-profit agency created by the Canadian book industry and the Department of Canadian Heritage to facilitate improvements in the book industry supply chain. It provides services and develops standards and certification in areas including electronic commerce via EDI (Electronic Document Interchange), bibliographic data, and analysis of point-of-sales and other supply chain data.

We acknowledge the financial support of the Government of Canada through the Canada Book Fund (CBF) for this project / Nous remercions l'appui financier du gouvernement du Canada par l'entremise du Fonds du livre du Canada (FLC) pour ce projet



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