

Checking Out Canadians

**Are library users
interested in reading
Canadian content?**



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 residents of Canada, aged 18 years or older, who had purchased a minimum of one book, regardless of format, in the prior month. The panel included participants 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 2013.

BookNet Canada conducted a custom survey comprised of Q3 panelists who participated in the larger Canadian Book Consumer survey. The goal was to learn respondents' perceptions and attitudes towards Canadian books, authors, and subject matter. Findings were then compared to data from an equivalent consumer study published by the Association of Canadian Publishers in 2002.

Also included as part of this paper are the results of a survey conducted with librarians across Canada in November 2013. This survey was completed with the assistance of the Canadian Urban Libraries Council and received responses from a total of 36 librarians representing 31 library systems.

Introduction

Book buyers who have
read a Canadian author
declined from

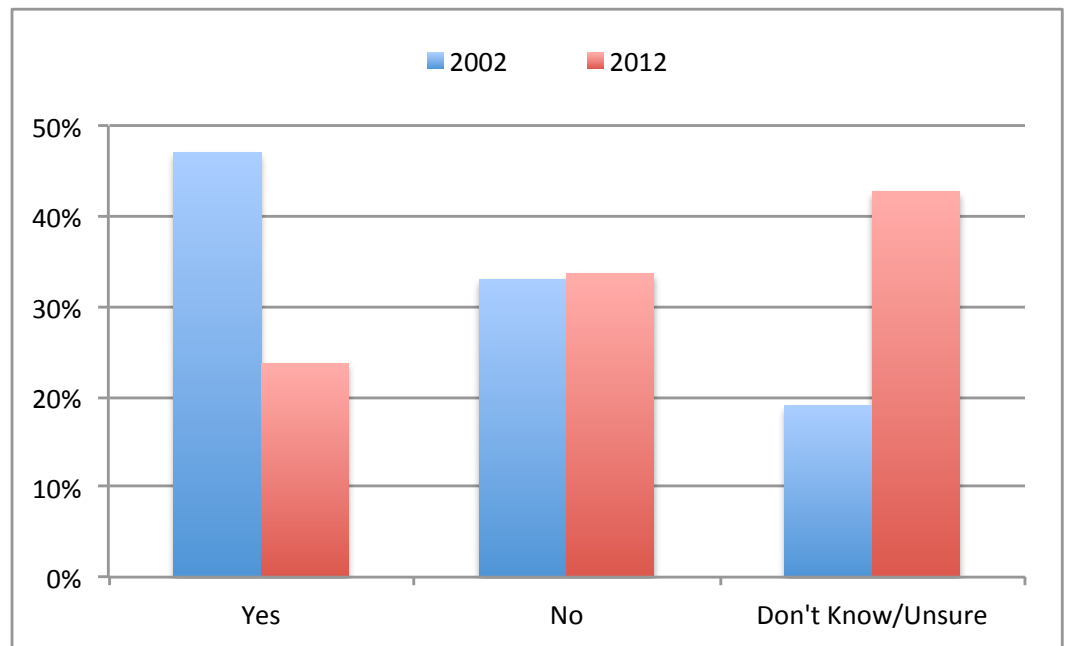
41% in 2002 to
24% in 2012

In February 2013 BookNet Canada released the study *Canadians Reading Canadians: How Interested Are Canadians in Reading Canadian Content?* The goal of this research was 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.

In this study BookNet Canada followed up on earlier research that was conducted by the Association of Canadian Publishers (ACP) in 2002. In 2002, the ACP released a consumer study titled *Canadian Book Buying Habits: What Influences Purchases?* BookNet Canada replicated the ACP's questions, creating the opportunity to measure how opinions have changed over this ten-year period.

One of the most poignant findings that came out of the BookNet Canada study was pertaining to the decline of book buyers reading Canadian authors and the increase in uncertainty over whether they had even read a Canadian author in the last year. Respondents who said they read a Canadian author declined from 41% in 2002 to 24% in 2012. Corresponding to this, we found that 43% of respondents did not know whether they had read a Canadian author in the last year, up from 19% in 2002. There was a similar trend over the past decade with Canadian subjects.

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)

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

Where Libraries Enter the Picture

30%
of library users have
read a Canadian
author in the past year

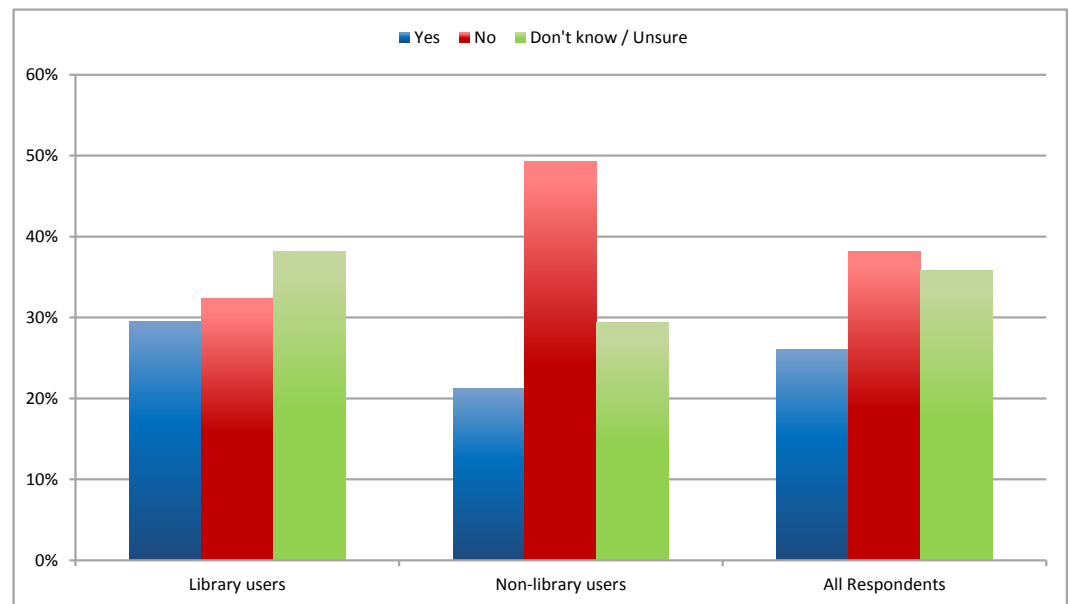
After *Canadians Reading Canadians* was released, BookNet Canada was asked to conduct some follow-up research to see whether these same findings apply to book buyers who use the library. It is important to emphasize that the focus of this work is not to review library collections, as we assume that Canadian public libraries provide their patrons with exceptional access to Canadian authors and content, but rather to assess patrons' ability to discover Canadian content, with a particular focus on online discovery. BookNet Canada works extensively with publishers in order to ensure that their bibliographic data includes the data points that are needed by the book industry, including Canadian authorship. Canadian publishers have done an immense amount of work in order to ensure they are delivering high quality bibliographic data for use throughout the book industry supply chain.

So BookNet Canada ran the same set of survey questions in Q3 2013, adding one additional question that asked whether the respondent had used a public library (online or in person) in the past 12 months. We received responses from 1,005 Canadians who had bought a book in the prior month, and a few of the results we found were surprising.

The graph below looks at whether respondents have read a Canadian author in the past year and breaks out this data by library users as compared to non-library users. Perhaps unsurprisingly, more library users claim to have read a Canadian author in the past year (30% as compared to 21% of non-library users). Similarly, fewer library users have not read a Canadian author (32% as compared to 49% of non-library users).

Where the responses start to diverge and perhaps become surprising is more library users (38%) do not know if they have read a Canadian author as compared to 29% of non-library users. Looking at all respondents, those who use the library and those who do not, we find that 36% do not know if they have read a Canadian author. This is up from 19% in 2002.

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



Question: Have you visited your public library (in person or online) in the past 12 months?
 Crosstab question: Have you read a book by a Canadian author in the last year?
 (N=1,005)

So why are we seeing such differences? This query led us to do a little head scratching, and then we contacted some experts—librarians in the field. A couple of feasible explanations that may contribute to these differences are that a lot of library loans are children’s titles and there is a perception that there is less of a profile, or focus, on Canadian authors of YA and children’s literature. While a few Canadian children’s authors such as Robert Munsch and Jean Little come to mind, it is easier to recall a much longer list of authors that focus on adult fiction and non-fiction.

Similar to children’s books, there are many non-fiction subject areas in which regional interest doesn’t play much of a role, as with the borrowing of DVDs. As the survey we conducted was qualitative, we did not limit responses by the type of materials that a library patron borrowed.

Library users purchase
10%
more books than
non-library users

Another possible contributing factor is cultural differences between library users and general book buyers in Canada. Slightly more book buyers who use the library were born outside of Canada (64%) than in Canada (59%). In our survey the difference in numbers is not significant, but the thinking is that library users tend to be quite culturally diverse and this may account for less interest in or knowledge about Canadian authors.

An additional possibility is that library users are likely to have read more books than non-library users in the previous 12 months, which may make it harder for the respondent to recall the nationality of all of the authors they read, resulting in greater uncertainty. Looking at our consumer data, we have found that library users purchase approximately 10% more books than non-library users.

Regardless of the reason, or whether library users are more or less aware than your average book buyer, the point is we are finding that library users also have a high level of uncertainty when it comes to whether they have read a Canadian author in the past year.

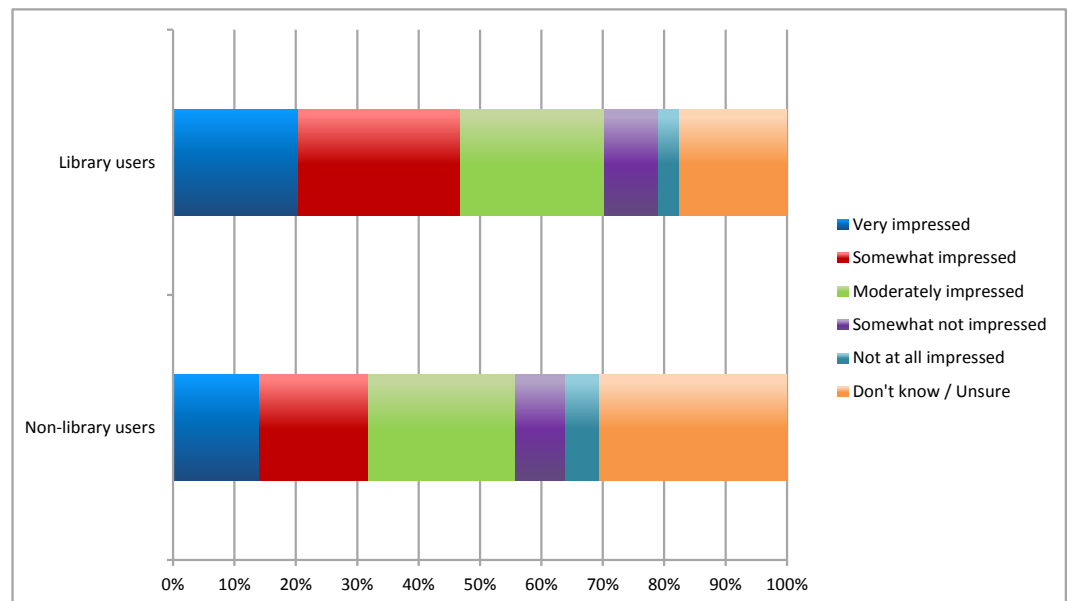
Perceptions of Canadian Books

70%
of library users said
they are impressed with
Canadian authors

As in our earlier study, we need to look at whether Canadian library users are really interested in reading Canadian authors and whether this differs from non-library users. What we did was cross-tabulate 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?” This allows us to explicitly look at respondents who are interested in reading Canadian books and whether they are aware of whether they have done so in the past year. We found that 27% of respondents said they are somewhat or very interested in reading Canadian authors but did not know if they had read a Canadian author in the past year, as compared to only 18% of non-library users. 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.

We also asked respondents, when thinking generally about their impressions of books, how impressed they are by books written by Canadian authors. We found that library users feel more strongly about Canadian authors, with 70% responding they are “moderately,” “somewhat,” or “very” impressed with Canadian authors. This compares to only 56% of non-library users who were moderately to very impressed.

IMPRESSION OF BOOKS WRITTEN BY CANADIAN AUTHORS



Question: Have you visited your public library (in person or online) in the past 12 months? Crosstab question: Thinking generally about your impressions of books written by Canadian authors, how impressed would you say you are? (N= 1,005)

Discoverability of Canadian Authors

If 38% of library users don't know if they have read a Canadian author in the past year, where are they finding information on Canadian books and authors?

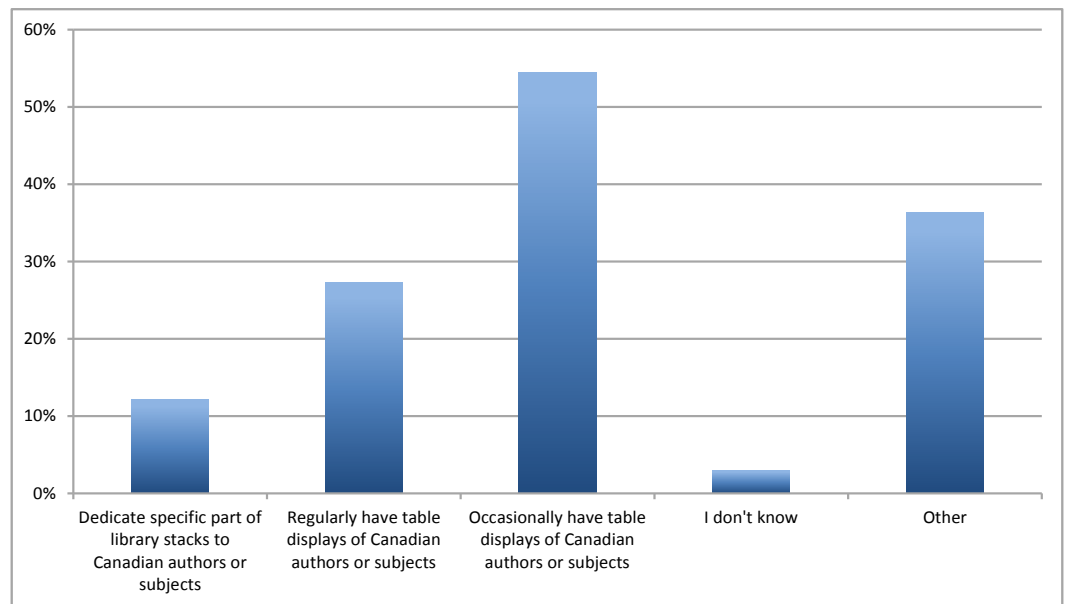
Major online retailers do not list a Canadian flag associated with specific titles, offer Canadian search limiters, or provide any other indicators of Canadian authors or subjects. Some retailers do offer Canadian lists or a Canadian store. Websites such as 49th Shelf (49thshelf.com) feature Canadian books, and readers are able to find Canadian bestseller lists in sources such as *The Globe and Mail*. While not directly consumer-facing, BNC CataList also offers the ability to access and export Canadian authorship data—a public version of the website is also available.

In order to explore discoverability in libraries, with the assistance of the Canadian Urban Libraries Council, BookNet Canada circulated a short survey asking librarians how they are enabling their patrons to discover Canadian authors. In total we had responses from 36 librarians representing 31 library systems from across Canada. While this is not an incredibly large number of responses, most major library systems are represented and we feel that the data is representative enough to generalize about some trends and areas of interest.

When looking at how libraries treat physical product, three quarters of librarians said they include a Canadian flag on the book or product spine (CD, DVD, etc.), while 19% of librarians said they indicate this via other means, such as a non-fiction “c” prefix or through subject classification.

Within the library, 12% of librarians said they dedicate part of their stacks to Canadian content (author or subject); note that this may be a regional section or one dedicated to more general Canadian content. 55% of librarians said that they only have occasional table displays, while the “other” responses include literature guides, booklists, sections for regional content, and the presentation of Canadian award nominees and winners.

PROMOTION OF CANADIAN AUTHORS OR SUBJECTS IN THE LIBRARY

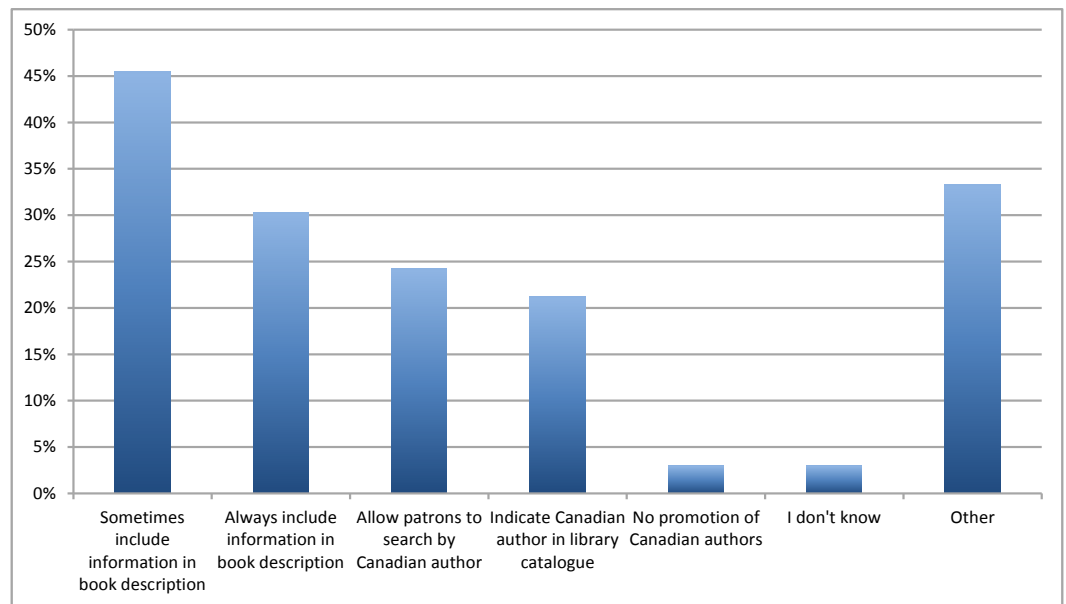


Question: How do you promote Canadian authors or subjects in your library? (Please select all that apply)
(N= 33)

When speaking specifically about library catalogues, we found that just over 20% of responding libraries are indicating Canadian authorship in their catalogue and just under a quarter (24%) allow patrons to search by Canadian authorship. Libraries do undertake other initiatives such as including information in the book description, but when it comes to discoverability this information may be difficult for patrons to find when they are seeking Canadian materials.

Respondents who chose “other” as an answer cited practices such as highlighting Canadian award winners on the library website and having separate lists of Canadian books in the library catalogue (e.g., Canadian award winners or staff recommendations).

PROMOTION OF CANADIAN AUTHORS OR SUBJECTS IN LIBRARY CATALOGUES



Question: How do you promote Canadian authors or subjects in your library's catalogue? (Please select all that apply)
(N= 33)

In BookNet Canada's discussions with libraries we have heard that many library systems find it difficult to find authoritative information on Canadian authorship. We asked librarians in our survey where they tend to find that information: 28% said they don't know where to find complete and authoritative information on who is a Canadian author, and 6% said they don't look for this information. The most commonly used sources are journals, library databases, online searches, author websites, and staff knowledge.

BookNet Canada's Provision of Data

BiblioShare provides
libraries with free
access to over
1.6 million
bibliographic records

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—a simple, straightforward way for publishers to indicate that their work has a Canadian contributor. The term “contributor” in this context may extend to author, illustrator, or other types of contributor. Between April 2011 and April 2014, we have seen a 146% increase in the use of the Canadian contributor field. Whether it is to flag a Canadian author or to be considered for inclusion in a Canadian bestseller list, publishers appear to be increasingly aware of the importance of promoting and marketing Canadian content.

BISAC subject codes¹ are the current North American standard that publishers use to tell retailers or libraries into which category or section of a bookstore a book might be placed. Think of it as a generalized cataloguing system for the trade book industry.

To provide help in identifying books of specific interest, BISAC has established merchandising codes, which are not often used in Canada, and a system to identify regional themes.² At the moment, the formal list identifies provinces and a limited number of cities and sub-regions, but further refinement has been ongoing. This allows for greater flexibility, as the theme can be as loosely geographical as the Canadian Rockies, and has the potential to be as specific as a Montreal neighbourhood. It's just a matter of enough books being published about a regional subject to make it a viable theme—book publishing subject lists always require enough books being currently published about a subject to make it useful. This rule applies both to the BISAC Subject Code and the BISAC Regional Theme. The standard rule of thumb would be 100 active titles to support a code value.

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

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

There is a new publishing subject standard being developed, Thema, and the primary difference between Thema and BISAC is that Thema is international, while BISAC is focused solely on North American publishing. Otherwise the general concept of the codes being tied to actual use is similar, though Thema subjects can be 'qualified' with the addition of codes for geography, historical period, language, educational purpose, interest (includes merchandising codes), and artistic style. While the subject codes might be argued to be a bit constrained to support international neutrality, they are balanced by a feature of Thema: National groups can add codes to the qualifier lists. So using the geography list as an example, Thema supports the country- and continent-based codes you would expect, but the Canadian national group has already added over 180 codes breaking down the "Canada" code into some very specific regions. The hierarchical nature of the codes allows out-of-country groups to take the codes to the level of interest suitable for their market, while supporting each country with as much detail as they care to request for support.

For any publishing subject standard a regional theme is intended to refer to the book's content (there are separate means in ONIX to identify the author's hometown) and should be used to highlight a book for regional opportunities such as cataloging considerations for regional libraries, regional promotions and media, and regional purchase by booksellers, libraries, and retailers.

BookNet Canada is also in the process of adding basic ONIX-to-MARC exporting from BiblioShare. This will allow MARC records to include Canadian authorship data. Stay tuned for more information.

If you are interested in seeing what free services BiblioShare has to offer your library, please email biblioshare@booknetcanada.ca and we will get you started.

Conclusion

BookNet Canada would like to issue a challenge to Canadian libraries: examine the effectiveness of your promotional efforts around books authored by Canadians or about Canadian subjects. When you put together a display of Canadian award winners or Canadian authors, do these titles circulate more? When you create a resource on your website that gives librarian picks of Canadian authors or new Canadian content, do you see an increase in visits to those pages or increased circulation? If the answer is yes, then take some time to look at how searchable this information is in your library catalogue. Can patrons limit their search criteria to Canadian authors? Are Canadian titles visually flagged in your catalogue?

Canadian publishers have done a lot of work over the past several years to include this regional and Canadian information in their bibliographic data. Most Canadian and many of the multinational publishers now include the country indicator in the contributor composite of their ONIX files, actively promoting the fact that their work is Canadian.

Canadians (and library users) are telling us that they want to read books by Canadian authors and about Canadian subjects. 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 to make it easier for readers to find Canadian content.

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 was an excellent first step, and now that much of this content is readily available to libraries, at no cost, we urge you to take note of it and use as much of it as you can.

Acknowledgements

ABOUT BOOKNET CANADA

BookNet Canada is a non-profit organization that develops technology, standards, and education to serve the Canadian book industry. Founded in 2002 to address systemic challenges in the industry, BookNet Canada supports publishing companies, booksellers, wholesalers, distributors, sales agents, and libraries across the country.

BookNet Canada's services and research help companies promote and sell books, streamline workflows, and analyze and adapt to a rapidly changing market. BookNet Canada sets technology standards and educates organizations about how to apply them, performs market research, and tracks 85% of all Canadian print book sales through BNC SalesData.

Industry-led and partially funded by the Department of Canadian Heritage, BookNet Canada has become, as The Globe and Mail puts it, "the book industry's supply-chain nerve centre."

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



Canadian
Heritage

Patrimoine
canadien

Canada

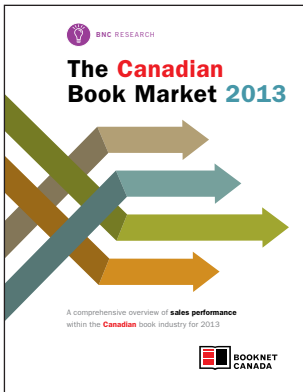
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