



RESEARCH & EDUCATION

Canadian Book Consumer Study 2020



**BOOKNET
CANADA**

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Data and methodology

The Canadian Book Consumer survey is fielded quarterly. The results in this study are from surveys fielded in April, July, and October 2020 and January 2021 among 12,022 English-speaking Canadians over the age of 18 who met our screening criteria.

The survey methodology:

- Respondents were in Canada, aged 18 and over, and representative of the Canadian population based on age, gender, and geographical region.
- The survey was limited to those with internet access who were able to and wanted to participate in our online panel in exchange for cash incentives and rewards.
- The data is unweighted to represent the behaviour and habits of individual Canadians.

Most of the answers we're sharing in this study are from questions that asked respondents about their *last month's* book-related behaviour:

- 'Buyers' are respondents who said they had bought at least one new book in either March, June, September, or December 2020 (a total of 2,750 Canadians).
- 'Non-buyers' are respondents who didn't buy at least one new book in the past month (a total of 9,272 Canadians).
- 'Borrowers' are respondents who said they visited a public library (in person or online) and checked out at least one book in either March, June, September, or December 2020 (a total of 2,980 Canadians).

Some questions asked respondents about their book-related behaviour in the *last year*:

- 'Readers' are respondents who said they had read at least one book in the last year, for a total of 8,528 Canadians. (Readers could be buyers or non-buyers.)

When we use the term 'book(s)', we are referring to new print books, ebooks, and/or audiobooks combined, unless specified.

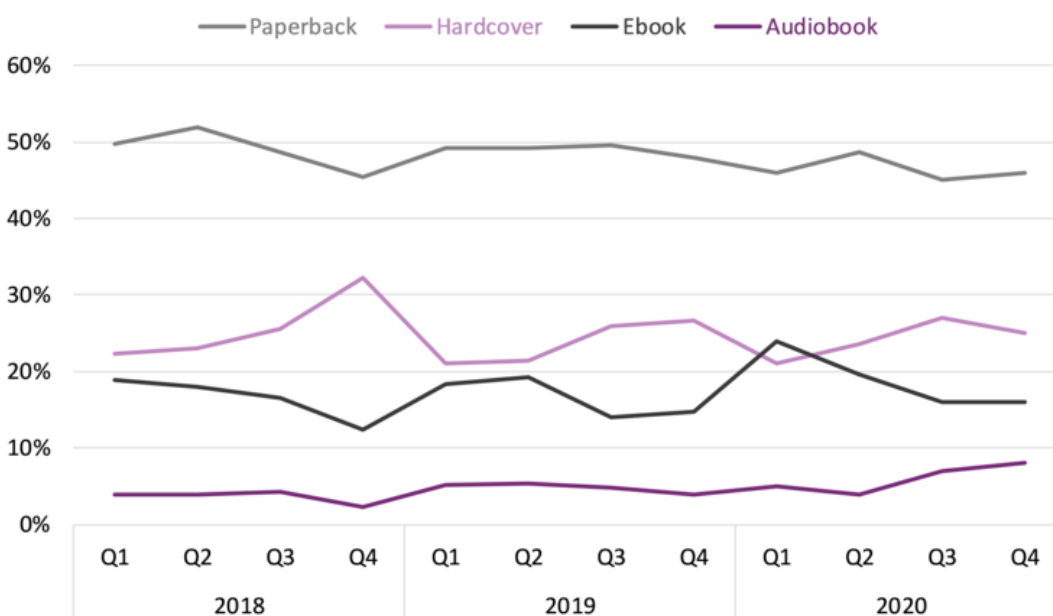
The study was prepared by BookNet Canada staff.

Canadian book buyers

The first thing we learned is that 2,750 of our survey respondents said they bought at least one new book the prior month, in this case, March, June, September, or December 2020. We wanted to find out: What formats and subjects did they buy? Where were they buying their books? Why did they buy them there?

About 75% of purchases were print books, while digital books made up about 25% of purchases. As the graph below shows, paperback purchases made up about half of book purchases and 25% of purchases were hardcovers. Paperback purchases trended slightly down from 2018 to 2020. Hardcover purchases were mostly flat, with increases in the fourth quarter each year, corresponding to the holiday shopping season in December. Audiobook purchases hovered between 2% and 8%, trending slightly upwards over the last few years.

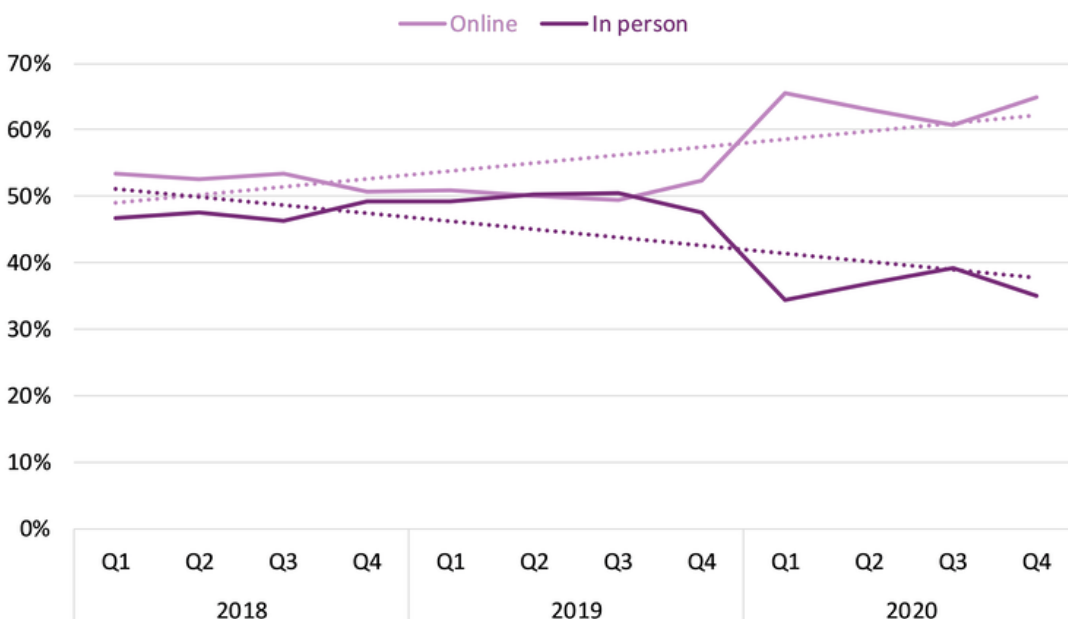
Purchases by book format 2018–2020



Are books mainly being purchased online? It depends on when the purchase was made. Online and in-person purchases were split exactly 50/50 in the second quarter of 2019, while in the first quarter of 2018 there was a difference of 7% between the two channels. At the end of 2019, online purchases were trending slightly down. However, purchases made in March 2020 began to move more online, which makes sense considering that many physical stores closed, or were closing, because of pandemic-resulted lockdowns. At the end of 2020 in December,

online purchases rose to 65%, a 24% increase from the fourth quarter in 2019. Overall in 2020, 64% of purchases were made online (website or app), with 36% of purchases bought in person.

Purchases by channel 2018–2020



Where are people buying? In 2020, 50% of purchases were bought via an online retailer, 23% at a bookstore, 12% from a general retailer or grocery store, and 7% from both mobile apps and ebook/audiobook stores. About three quarters of Canadians bought where they did because of the price (74%). They also bought because books were in stock or available immediately (71%) or it was a convenient place to shop (69%).

Other reasons people gave for why they bought where they did:

- Good selection of books (63%)
- Cheap or free delivery (49%)
- Easy checkout process (47%)
- Easy to navigate (45%)
- Good service (42%)
- Loyalty card or subscription (35%)
- Already shopping there for other items (34%)
- Happened to see the book there (33%)
- Enjoy shopping there (28%)
- It's a habit (28%)

- The shop's COVID-19 protective measures (27%)
- Ability to look inside the book or read an extract before buying (24%)
- To support the shop (14%)

Purchase price and perceived value

In 2020, buyers on average bought 1.8 print books, 0.9 ebooks, and 0.3 audiobooks in the prior month.

When we look at the average of books bought by format, we see that

- print buyers bought, on average, 2.3 print books in the prior month, compared with 0.5 ebooks and 0.2 audiobooks;
- ebook buyers bought an average of 2.7 ebooks, 1.2 print books and 0.6 audiobooks; and
- audiobook buyers bought, on average, 2.2 audiobooks, 1.7 print books, and 1.6 ebooks in the prior month.

Slightly more than half of buyers bought their books at full price (55%), while 28% bought a discounted book. The rest used a coupon or bought the book as part of a multi-buy deal or subscription.

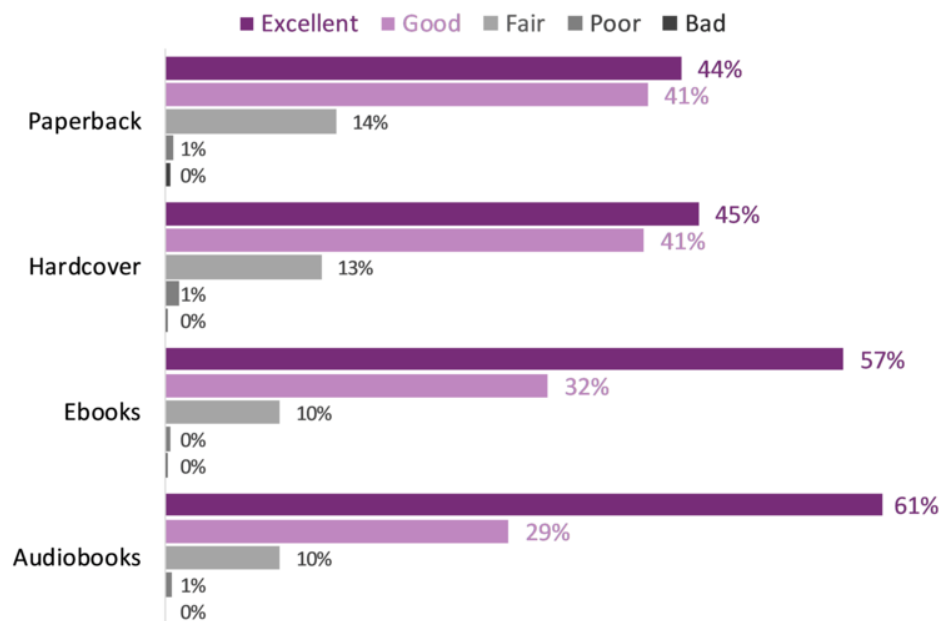
The average price paid by format was:

- \$16.34 for paperbacks
- \$22.98 for hardcovers
- \$11.62 for ebooks
- \$14.38 for audiobooks

When we look at the perceived value by format, digital book buyers rated the value for their money higher than did print book buyers. There was a larger difference between a rating of excellent and good between print and digital books.

About half of those who had purchased a book in the last month, said that they received excellent value for their money at the price they paid for the purchases (48%). About one third rated the purchases as good value (38%). Overall, when rated out of 5 (the top rating), paperbacks and hardcovers each were rated 4.3, ebooks were rated 4.4, and audiobooks were rated 4.5.

Perceived value by format



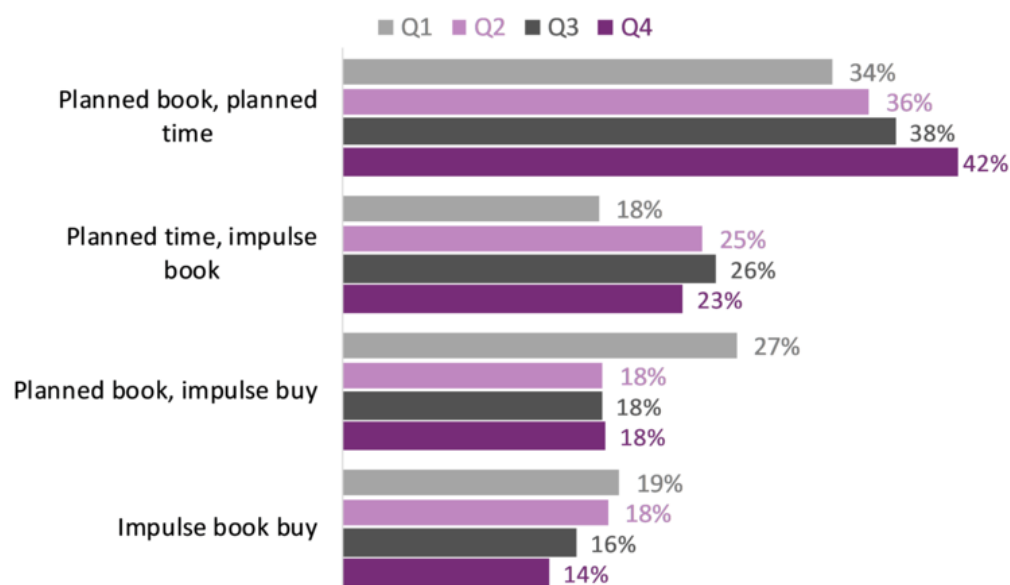
Planned vs. impulse purchases

When making their purchase, about eight in ten buyers only bought books (79%). However, 21% bought additional non-book items with their book(s) purchase, mostly groceries, then clothing, toys, or games. About a quarter of people said they always add books to their online cart to get free shipping (27%), and over a third of people sometimes do so (38%).

Were these book purchases an impulse or planned ahead of time? In 2020, 37% of people had planned ahead to buy the particular book at that specific time, while 23% planned to buy a book at that specific time, but not that particular book, and 20% planned to buy that particular book, but not necessarily at that specific time. In comparison, 17% of people made impulse book buys both in terms of the book and the timing.

As we mentioned previously, people bought from where they did because they were already shopping there for other items (34%) and they happened to see the book there (33%).

Planned purchases by book and/or time



The increase of planned book purchases in December 2020 is likely due to the holiday shopping season. The percentage of gift purchases in 2020 increased by 11%, from 16% in September to 27% in December. The increase was the same in 2019. From September to December 2019, gift purchases also increased by 11%, from 17% to 28%. In contrast, September 2018 gift purchases were lower, at 13%, leading to a 17% increase in gift purchases back up to 30% in December 2018. As we learned above, online and in-person purchases were split almost 50/50 in the last half of both 2018 and 2019.

Did the pandemic have an impact on book buying habits? Regardless of whether book purchases were for themselves or others, 24% of buyers in the last three quarters of 2020 said that COVID-19 was impacting their book buying, but slightly over half of buyers disagreed (55%).

Genres and subjects

What genres of books are people buying? About three quarters of buyers classified their book purchases as adult books (72%), with 17% classified as young adult, and 10% as children's/middle grade books. Of adult and young adult book purchases, most were Fiction (59%).

Popular Fiction sub-genres:

1. Suspense and thrillers (18%)
2. Fantasy (17%)
3. Mystery/detective (15%)

Popular Non-Fiction sub-genres:

1. Biographies or memoirs (25%)
2. Self-help (14%)
3. History (12%)

How does the popularity of these self-identified subjects purchased (of all formats) compare to the subjects we know are bought in print? Retailer-provided sales of new (not secondhand or used) print books categorized by [BISAC subject codes](#) via BNC [SalesData](#) show these popular sub-genres for Fiction and Non-Fiction in 2020 ranked as follows:

Fiction

- Fiction / Thrillers
- Fiction / Romance
- Fiction / Women

Non-Fiction

- Non-Fiction / Biography & Autobiography
- Non-Fiction / Cooking
- Non-Fiction / Self-help

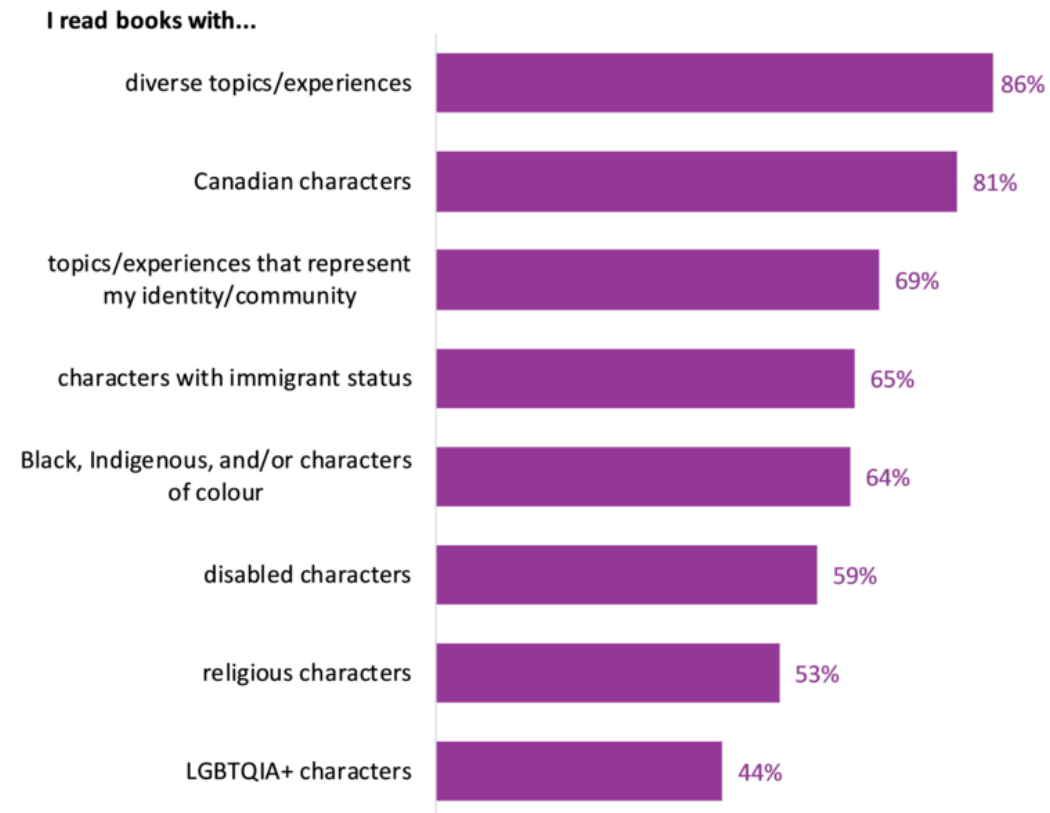
Why and how Canadians acquire books

Why do people read and what factors influence their decision to pick up a specific book? In 2020, Canadians were mostly reading to relax and enjoy (77%). About half read to pass the time (56%), 41% read to gain knowledge, and 38% read to become immersed in another world. These reading preferences and rankings haven't changed since we started asking this question in early 2019.

In 2020, when respondents were asked whether they read books with Canadian characters, 18% said they did, 19% said they didn't, and 63% of readers said they did sometimes.

When we combine the “yes” and “sometimes” answers, 81% read books with Canadian characters. The most popular types of books that people read were books with diverse topics/experiences (86%).

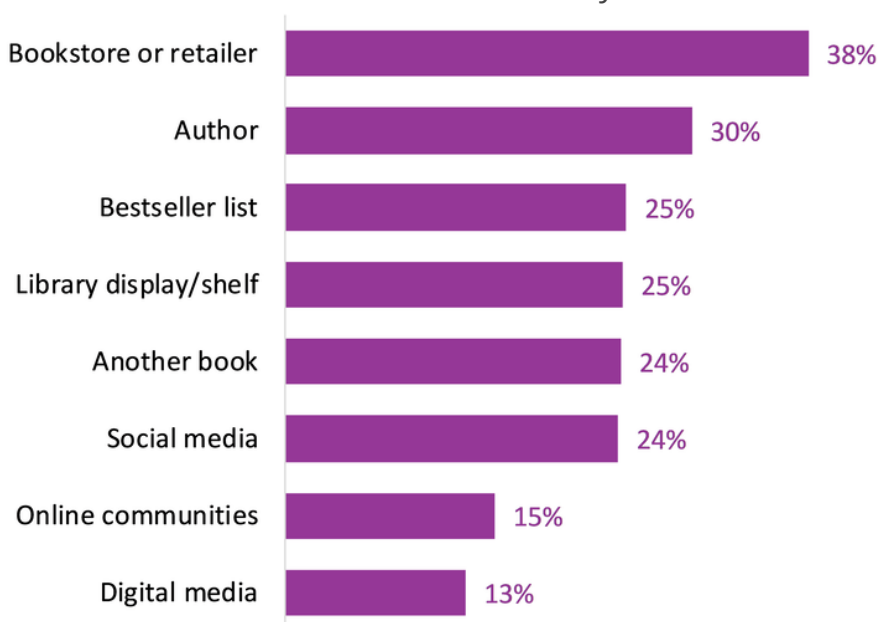
Popular types of books among Canadians



Awareness and discoverability

When we asked readers how they generally became aware of books they read or listen to, 38% said awareness was created at a bookstore or retailer, 30% from an author, 25% from a bestseller list, and 25% from the public library.

How readers became aware of books they read



When it comes to book buyers (Canadians who bought at least one new book in March, June, September, or December) we learned that:

- 25% of them became aware of the book they purchased by reading other books by the same author; similar to what we saw in 2019 among book buyers (21%)
- 20% discovered the book through a recommendation or review; an 8% increase from 2019 (12%)
- 18% discovered books by browsing or searching online or in person; very close to what we found in 2019 (17%)
- 10% became aware of the book they read thanks to social media; double from 2019 (5%)

For the 18% who discovered books by browsing or searching online or in person, we found that:

- 43% browsed on a bookseller's website; up from 38% in 2019
- 25% browsed in a store in person; a decrease from 42% in 2019

- 20% searched via a search engine; in 2019 only 9% reported discovering books this way
- 8% browsed on social media
- 8% browsed on review websites
- 7% searched on the author's website or social media
- 6% searched on the publisher's website
- 5% browsed at a library (in person or online)

When we look at the majority of where these buyers ended up purchasing the books they discovered, more than half were bought from an online retailer/app (64%) and about a quarter at a bookstore (23%).

When we focus on ebooks, we found that 28% of ebook buyers became aware of the ebook they purchased from reading other books by the author. Recommendations or reviews, and browsing or searching were both at 18%, while 14% became aware via email newsletters or alerts (much higher than for print book or audiobook buyers).

Audiobook buyers had more distributed discovery methods than print book and ebook buyers. The most popular were via recommendation (31%), 23% each for reading other books by the author and social media, and 21% via browsing.

Deciding which books to read, buy, or borrow

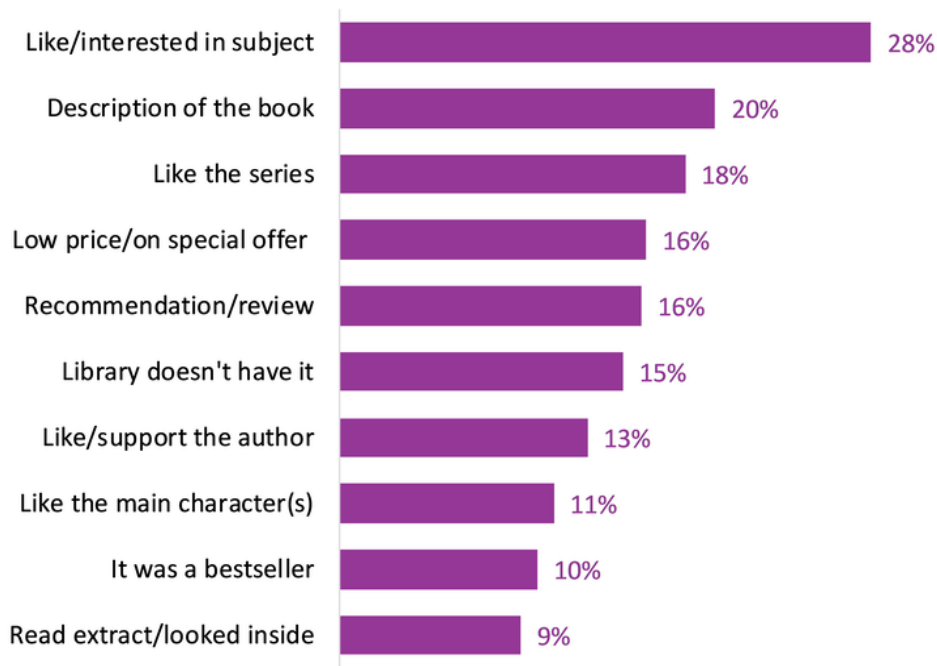
How did people decide which book to read, borrow, or buy? Mostly by reading the book description (54%). Other popular factors were: looking at the subject (35%), the cover (33%), the author (34%), and reviews (29%).

Actions taken to decide which book to read, borrow, or buy



What made buyers decide to purchase a new book in 2020? The book's content, price, and availability.

Reasons to purchase a new book



Acquiring books

When asked about the ways Canadians acquired books last year, we found that about half of respondents reported having purchased a book, about a quarter borrowed a book from the public library, and one third didn't acquire any books.

Ways Canadians obtained books of all formats in 2020:

- 33% bought a new print book
- 32% borrowed a book from a public library
- 18% bought a secondhand book
- 18% borrowed a print book
- 18% were gifted a print book
- 14% got an audiobook for free
- 11% downloaded an ebook for free
- 10% bought an ebook
- 8% borrowed an ebook
- 5% bought an audiobook

Comparing buyers and borrowers in a typical month

Where did they buy and borrow books? Do borrowers buy more books compared to buyers? What role does the library play in book buying?

First, some different types of respondents we identified:

- Those who only bought: 1,485 (12% of all respondents)
- Those who only borrowed: 2,447 (20% of all respondents)
- Those who both bought and borrowed: 1,265 (11% of all respondents)

We found that Canadians bought more books than they borrowed from a public library and people who borrowed books also bought books at a higher rate than those who didn't borrow. Let's take a closer look at buyers and borrowers and see how many books, by format, each group acquired in a month.

All buyers (including buyers who also borrowed):

- Bought: 1.8 print books, 0.9 ebooks, and 0.3 audiobooks (2.9 total books)
- Borrowed: 2.6 print books, 1.1 ebooks, and 0.6 audiobooks (4.3 total books)

All borrowers (including borrowers who also bought):

- Bought: 1.8 print books, 1.0 ebooks, and 0.5 audiobooks (3.2 total books)
- Borrowed: 2.8 print books, 1.2 ebooks, and 0.5 audiobooks (4.5 total books)

Buyer only:

- Bought: 1.7 print books, 0.7 ebooks, and 0.2 audiobooks (2.6 total books)

Borrower only:

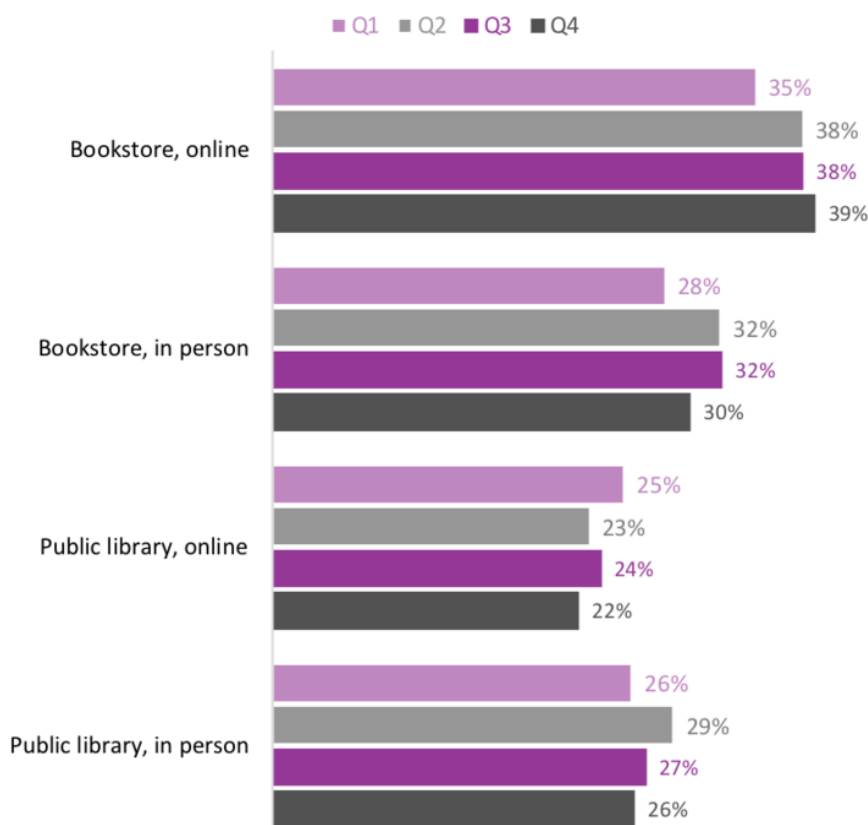
- Borrowed: 3.0 print books, 1.2 ebooks, and 0.4 audiobooks (4.6 total books)

(Due to data analysis, the total books may not be the sum of the three formats.)

Those who both bought and borrowed books purchased about 0.6 more books per month on average than those who only bought. They also borrowed slightly fewer books than those who only borrowed.

We found that about four in 10 Canadians visited a bookstore, retailer, or public library at least once in the previous month. Almost half of the respondents said it's easy to find what they're looking for in each one of these places.

Places visited in the last month to buy or borrow books, 2020



Visits to bookstores and libraries

Let's focus on the 38% of readers who said they discovered the books they read or listened to at a bookstore or retailer, and the 25% who said the same of public libraries.

How do visits to these two venues impact the number of books purchased or checked out by buyers and borrowers? Did people who visited the public library buy more books than those who didn't? How are digital format purchases and borrows impacted by online or in-person visiting?

To find out, we mixed and matched buying and borrowing on average in the prior month (in March, June, September, and December 2020) with whether a buyer or borrower had visited a library or retailer, and whether that visit was online or in-person. Not surprisingly, all of our buyers visited a bookstore or retailer that sells books, either at a physical store or online in 2020 to purchase books. What might be of more interest is the breakdown between physical visits and online visits.

Buyers who visited a *bookstore, or retailer that sells books*, at least once (99% of buyers), bought a total of 3.0 books — 1.8 print books, 0.9 ebooks, and 0.3 audiobooks.

- In-person visitors (71% of buyers):
 - Bought: 3.1 total books — 2.0 print books, 0.9 ebooks, and 0.3 audiobooks
- Online visitors (86% of buyers):
 - Bought: 3.0 total books — 1.8 print books, 0.9 ebooks, and 0.3 audiobooks

Buyers who visited a *public library* online, or in-person, at least once (52% of buyers) bought a total of 3.2 books — 1.8 print books, 1.0 ebooks, and 0.4 audiobooks. This group of buyers borrowed a total of 3.8 books — 2.3 print books, 1.0 ebooks, and 0.5 audiobooks.

- In-person visitors:
 - Borrowed: 4.4 total books — 3.1 print books, 0.8 ebooks, and 0.5 audiobooks
- Online visitors:
 - Borrowed: 4.0 total books — 2.3 print books, 1.1 ebooks, and 0.6 audiobooks

Borrowers visited a public library online or at a physical location at least once (35% of respondents) and borrowed a total of 4.0 books — 2.5 print books, 1.1 ebooks, and 0.4 audiobooks.

- In-person visitors (67% of library visitors):
 - Borrowed: 4.7 total books — 3.4 print books, 0.9 ebooks, and 0.4 audiobooks
- Online visitors (77% of library visitors):
 - Borrowed: 4.4 total books — 2.6 print books, 1.3 ebooks, and 0.5 audiobooks

(Due to data analysis, the total books may not be the sum of the three formats.)

When comparing buyers who visited a public library at least once in the prior month with buyers who hadn't, we found that library visitors bought slightly more print books on average in 2020. Looking at formats, it appears that online retail visits resulted in slightly more digital format purchases, and online library visits had a bigger impact on digital format borrowing.

This isn't to say that buyers were solely discovering books to buy through library browsing. About 5% of book purchases had library browsing selected as a factor in creating awareness in both 2020 and 2019, compared to other browsing places like the bookseller's website (43% in 2020 vs. 38% in 2019) or in a physical bookstore (25% in 2020 vs. 42% in 2019).

Since both bookstores and libraries were closed at different times throughout 2020, it seems that awareness through browsing by library is primarily based on in-person browsing for print books (as digital checkouts were less hindered by the lockdowns).

According to borrowers' responses, most visits to the library were to find a specific book or author (24%), pick up holds (23%), and browse displays and shelves for books to borrow (17%).

Decision-making

Visits to the library increase book awareness. Familiarity leads to purchases and checkouts. But, how did buyers and borrowers decide whether to read, borrow, or buy the book they got in June, September, and December 2020? In-store or online, what influenced people's decisions?

Buyers had five main decision-influencing actions when deciding whether to read, borrow, or buy a particular book:

1. Reading the book description (63%)
2. Seeing who the author is (42%)
3. Seeing the subject/genre of the book (42%)
4. Looking at the cover (41%)
5. Reading the book's reviews (39%)

Other actions taken by buyers were reading about the author (27%), comparing the price in multiple places (23%), reading/listening to a sample or excerpt (22%), and checking to see if the library has it (21%).

Borrowers' actions were more evenly distributed among the many options we provided, with six main decision-influencing actions:

1. Seeing the subject/genre of the book (83%)
2. Reading the blurbs by other authors (65%)
3. Comparing the price in multiple places (60%)
4. Reading or listening to a sample or excerpt (54%)
5. Reading reviews about the book (50%)
6. Reading the book description (48%)

Other actions taken by borrowers were seeing if the book was on a bestseller list (36%), checking to see if the library has it (28%), seeing if the book won or was nominated for a book prize (23%), asking what a friend thinks (21%), and reading about the author (20%).

When we compare percentage points between key buying or borrowing factors, we found that borrowers seem to be influenced by a greater variety of factors than buyers:

- 37% more borrowers compare the book's price;
- 32% more borrowers read or listen to a sample or excerpt;
- 22% more borrowers are influenced by the bestseller list than buyers;
- 14% more borrowers are influenced by book prize nominations/winners; and
- 7% more borrowers checked to see whether the library has the book.

Books are being bought and borrowed, but were they being read by more buyers or borrowers in 2020? It depends on the format. Fewer buyers read a print book than borrowers — 77% of buyers said they read a print book, compared with 81% of borrowers. For digital books, there were fewer differences: 40% of buyers read

an ebook compared to 41% of borrowers, and 27% of buyers listened to an audiobook, compared to 25% of borrowers.

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 acknowledges that its staff, board, and partners work upon the traditional territories of the Mississaugas of the Credit First Nation, Anishnawbe, Haudenosaunee, Wendat, and Huron Indigenous Peoples, the original nations of this land. We endorse the Calls to Action from the Truth and Reconciliation Commission of Canada and support an ongoing shift from gatekeeping to spacemaking in the book industry.

The book industry has long been an industry of gatekeeping. Anyone who works at any stage of the book supply chain carries a responsibility to serve readers by publishing, promoting, and supplying works that represent the wide extent of human experiences and identities, in all its complicated intersectionality. We, at BookNet Canada, are committed to working with our partners in the industry as we move towards a framework that supports “spacemaking,” which ensures that marginalized creators and professionals all have the opportunity to contribute, work, and lead.

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 English-language print trade book sales through BNC SalesData.

BookNet Canada has extensive research available on our [website](#), both free and for purchase.

- [The Canadian Book Market 2020](#): is a comprehensive guide to the Canadian market with in-depth category data. It's an indispensable tool for publishers,

booksellers, librarians, authors, and anyone interested or involved in the Canadian book industry.

- [Press Play: Audiobook Use in Canada 2020](#): This free report takes an in-depth look at how Canadian audiobook listeners discover, use, and feel about audiobooks, including what they like to listen to, when they like to listen, and how they obtain their audiobook content.

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