

More Canada

Increasing Canadians'
awareness and reading
of Canadian books

A report from volunteer think tank sessions on
Canadian books and Canadian publishing

December 2017 to September 2018

Facilitated by Canadian Publishers Hosted Software Solutions



Photos courtesy of Philip Cercone

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Foreword

About the volunteer think tank and this report

More than two years ago, a group of independent Canadian trade publishers – Errol Sharpe of Fernwood Publishing, Jeff Miller of Irwin Law, Steve Izma of Between the Lines, and James Lorimer of James Lorimer & Co – started working on a collaborative project to address the drastic decline we had experienced in revenues from universities using our books in courses. We decided to work on a market innovation: a digital platform where professors could search for chapters in books to use for student reading and then arrange for copies of these chapters to be purchased by bookstores for resale to students in a coursepack format. Our project amounted to building a new piece of digital infrastructure to support the awareness, promotion, and sale of Canadian-authored books to a specific group of readers.

This experience has taught us about the power and importance of the digital infrastructure that now underlies every aspect of the “supply chain” that moves manuscripts from authors to publishers and then to distributors, wholesalers, bookstores and libraries, and readers. It also intensified our awareness of the role that infrastructure plays in influencing what books people get to know about and what books they read.

As publishers, we have been noticing for some time that something is wrong with the state of books in Canada. We have experienced the declining impact of new books we publish: fewer people seem to know about them, and fewer people read them. Because we all have had decades of experience in publishing, going back to the tremendous burst of writing and publishing that happened in the 1960s and 1970s, we were applying a long perspective to the experience of the past few years.

We all had ideas about why this decline has been happening, but our understanding was anecdotal and specific to our personal experience and individual publishing houses. We felt that the problem was one that required a new approach, and we decided to initiate a volunteer think tank to address it. Our non-profit corporation undertaking the coursepack

initiative, Canadian Publishers Hosted Software Solutions, applied for and received a small grant from the Department of Canadian Heritage's Canada Book Fund to cover the out-of-pocket costs of bringing together a group of individuals with experience across the country in every genre of publishing. A steering committee of three publishers – Jeff Miller, James Lorimer, and Philip Cercone (of McGill-Queen's University Press) – took on the task of organizing this think tank initiative.

As a group, we wanted to get a much deeper understanding of the market and the infrastructures that operate in the book trade in English Canada today. We decided to focus on some key channels for awareness and reading: independent bookstores, school classrooms and libraries; public libraries; university libraries, classrooms and bookstores; and awareness channels – specifically CBC Radio, CBC Digital, and the major professional book reviewing publications. We commissioned a researcher to identify and assemble as much relevant research on each of these channels as she could locate, to provide the group with reliable background information. (The research package and associated briefing documents are available online at www.morecanadareport.ca.) The group of eight volunteer publishers spent a day together with three or four experienced professionals drawn from each of these sectors. With the help of a facilitator, we undertook a detailed exploration of the current operation of these channels, focusing on how they handle Canadian-authored books. We also sought ideas for interventions that could effectively generate higher levels of awareness and reading of Canadian books. Detailed notes were taken at these sessions.

This report aims to share the understanding that emerged from our background experience, the research documents we compiled, and the discussions of the think tank sessions regarding the operation of each of these distribution and awareness channels. This report aims to share the understanding that emerged from the steering committee's background experience, the research documents we compiled, and the discussions of the think tank sessions regarding the operation of each of the identified distribution and awareness channels. These findings, recommendations, and calls to action are provided by the steering committee based on conclusions drawn from the think tank discussions.

This document may not always represent the views of individual members of the think tank or those of their broader profession. It should also be noted that everyone involved in the think tank participated as individuals, not as representatives of their institution or company. The recommendations discussed in this document have not yet been reviewed by those organizations, and our objective is to encourage that discussion and debate with this document and the background material we have assembled.

Nor do we think that this report and its recommendations have all the answers. There are many other aspects of the publishing ecosystem not addressed here that also deserve serious study and discussion. These include the use of content rules similar to those currently in place in other media in Europe, issues around succession in the Canadian-owned sector of book publishing, and the opportunity to work with other media on ensuring a substantial Canadian presence in recommendation engines on digital content platforms. In recent months there have been policies developed and implemented in Europe requiring Netflix and similar online services to give significant visibility to domestic cultural work alongside international content. Precedents like this should be considered when we examine the impact of Amazon.com and Amazon.ca and Overdrive on awareness and book reading in Canada.

We hope that the publication of this report will lead everyone involved in writing, publishing, distributing, and creating awareness of Canadian books to take stock of where we are at today – and where we are going. We also hope the recommendations we are putting forward will lead to discussion, debate – and action.

We know from reaction to drafts of this document that, when it comes to action, there are divergent opinions on what is doable, what is desirable, and what would be effective. We welcome the debate that we hope will now take place. We all found that we learned a tremendous amount about how book publishing and distribution work in Canada today in the process of working on this project – even though we spend our working lives right in the middle of that publishing and distribution process.

We expect that the ensuing discussion and debate will give all of us a fuller understanding of the situation we are in today in English Canada as well as a better appreciation of the impacts of the measures we are suggesting. Other proposals for action will be made, a prospect that we welcome.

We hope that there will be wide support for the approach we are proposing, but we fully expect that the initial ideas in this report will go through many revisions and changes in the course of wider discussion and debate. Out of this process, we are confident that a new approach will emerge that will reverse the decline in awareness and reading of Canadian-authored books in English Canada.

So this report is offered as a first step toward action in every sector of the book supply chain, to new projects, the development of new infrastructure, new initiatives, and new government policies and programs. All of this is needed for Canadians to be able to find out about the wealth of books that are being written in Canada today, to come across them in bookstores and libraries, and to pick them out to read and enjoy.

Executive Summary

This report presents a description of the current state of the Canadian English-language book market, focusing on recent developments that touch all sectors of the industry and, in particular, on changes that are having a profound impact on the readership of Canadian books.

It is many years since a broad study of the landscape in English-Canadian writing and publishing was undertaken. While those working with books – as writers, publishers, distributors, booksellers, librarians, reviewers, or policy makers – are aware of the transformations that are occurring, there has been no comprehensive assessment of where we have come from and where we are today. Nor is there a commonly shared vision of the future of Canadian writing, publishing, and reading.

More Canada is intended to act as a catalyst for that discussion and for action to address an alarming paradox: despite the presence of a burgeoning writing community and a stable, successful publishing industry, there is a steady decline in the reading and purchasing of Canadian-authored books by the Canadian public.

The starting point for this report is existing research data on the English-language publishing industry, on Canadians' reading and book-buying habits, on public library practices, on universities, and on school library and classroom use of books. To those statistical resources, we brought the diverse experience of seasoned professionals from the Canadian book world. These individuals have an intimate knowledge of their respective sectors and share a dedication to the advancement of Canadian books and literature. Working within a think tank model, our volunteer contributors were free to explore ideas independently and creatively.

Overview: book publishing and book reading in English Canada

Based on output, writing and publishing are flourishing in English Canada. In a typical year, Canadian publishers release some 3,500 Canadian-authored trade titles. The majority of these – roughly 2,500 – are published by the over 100 Canadian-owned, independent publishing houses spread across the country. Thanks to substantial funding support from the Canada Council and the Department of Canadian Heritage – and to provincial measures that include arts council grants, creative industry support, and in some cases tax credits – the independent publishing houses in the industry today are reasonably stable and moderately profitable.

The Canadian branch plants of multinational publishers have an important role in publishing Canadian-authored books, releasing 800 to 900 new titles per year. Though these books represent only 20 per cent of the new Canadian-authored titles published, they account for 80 per cent of sales. The multinationals have succeeded in capturing the bulk of the bestselling books and authors, earning revenues for themselves while depriving the independent publisher sector of the most profitable projects. This is a reality of Canadian publishing, even though Canadian-owned firms may have first published and nurtured these bestselling authors.

With 3,500 titles annually, Canadian-authored books represent a tiny share of the new books coming into the English-Canadian book market every year. The United Nations Educational, Scientific and Cultural Organization (UNESCO) monitors both the number and type of books published per country per year as an index of standard of living and education and a country's self-awareness. For example, according to UNESCO, in 2010 the United Kingdom, home to the world's third largest publishing industry, put out 184,000 new and revised titles. The United States, the second largest, accounted for 304,912 new and revised editions. This means that well over 500,000 new international, mostly American- and British-authored and published, titles are available to the Canadian market every year. The bulk of the sales of these foreign-authored titles in Canada are made by the branch-plant publishing firms.

The number of new titles being published has increased dramatically over recent decades, both in Canada and internationally. Numbers have increased and so too has variety: there are Canadian books in virtually every genre and category, a presence that helps raise the Canadian component of sales and reading. At the same time, a new title typically sells fewer copies today than it did 10 or 20 years ago. The adoption of cheaper digital technologies by publishers and a host of new technologies by printers have made shorter print runs viable. Still, while more titles are being published, fewer copies of each are being sold.

Surveys of readers in all parts of Canada show that book reading remains an important leisure time activity for Canadians. The appearance of e-book readers has led to a split of book-reading time between print and digital formats, but early concerns about the disappearance of the printed book have diminished, with print books holding their position as the dominant format. Reader surveys also report that the attitudes of Canadians toward Canadian books and authors are very positive. Book readers value and enjoy Canadian books. A 2017 study showed that a high percentage of book readers had read at least one Canadian book in the previous 12 months. A similarly high percentage didn't know whether they had or not, reflecting a telling lack of awareness of which books, authors, and publishers actually are Canadian.

This is part of the picture of a new development in the English-language book trade that has not received much attention: the share of Canadian-authored books being purchased and read is declining. From a base of 16 per cent of all reading in 1978, Canadian-authored books enjoyed a share of total reading that peaked in the late 1980s or early 1990s. Since 2000, however, Canadians have been buying and reading a gradually smaller number of Canadian-authored books per capita. In 2005, Canadian-authored books accounted for 27 per cent of book purchases and 12 per cent of reading. Today, we have no reliable statistics for the share of Canadian-authored books in leisure reading. But in terms of book purchases, we know that Canadian-authored books published by independent publishers account for about 4 per cent of total book buying and those published by the branch plants account for about 9 per cent. Canadian-authored books today represent only 13 per cent of total book purchases – half the 2005 number.

The creative side of Canadian book writing and publishing is in good shape. But the consumption side is in serious trouble. Supply is strong; awareness and readership are weak.

Our analysis: key themes

In this report we assemble the findings of the available research and the expertise of our think tank participants to explain how we've arrived at this situation. We identify initiatives that will address and reverse the trend: enhancing the existing channels of book awareness and distribution and establishing new ones for Canadian-authored books.

Three major themes emerge from our analysis of how the book supply chain works in Canada today.

1. Digital infrastructure that fails to meet Canadian needs

Digital infrastructure underpins the activities of every business, institution, and organization in the book supply chain. Software technology has emerged in the past three decades to transform the operations and practices of all participants, including book consumers. Equally important, almost everyone in the chain uses digital infrastructure to create and distribute information about books to the marketplace – the essential “metadata” that provides details of content, price, specifications, the author, and more.

Some key components of Canada’s book trade infrastructure have been created in Canada, for Canadian needs. The best example is Bookmanager software, which is used by 300-plus independent bookstores to manage inventory, ordering, and sales reporting. Another is the electronic highway for business transactions operated on behalf of the Canadian book trade by BookNet Canada, an English-language industry non-profit.

The bulk of the software used by book trade organizations in Canada, however, has been created by US companies to meet American needs. This includes the circulation management systems used by many school libraries and public library systems and the software that manages their e-book collections; the software running the top online bookstore; and the software most publishers, large and small, use to run their business. Where Canadian-created software is used, it is usually built following standards and practices that were designed to reflect the needs of the US market (BISAC subject codes, for instance) or for the international book trade (ONIX metadata standards).

We found that the digital infrastructure currently in use in the Canadian book trade has inbuilt biases that invariably favour non-Canadian content or that stand in the way of allowing higher priority, visibility, or accessibility to Canadian-authored books. This is not intentional bias: It arises out of the needs and conditions of the markets and the users for whom the software and infrastructure were created. The consequences were evident everywhere we looked. Omnipresent digital infrastructure that does not effectively recognize Canadian books as being distinct from all other books turns out to have an enormous impact, and it is a key factor in the decline in awareness and reading of Canadian books by Canadians.

2. An absence of Canadian book-friendly cultural policies and measures

A second consistent observation of this report is the widespread absence of effective cultural policies and measures to assert the value of access to Canadian writing and books

by Canadians, young and old. The federal government’s major support program for publishing sets as its objective “to ensure access to a diverse range of Canadian-authored books nationally and internationally.”

Most provinces have programs to support writing and publishing in that province, in many cases quite generously. Provinces and municipalities make a substantial commitment to encouraging and supporting reading through their public library systems. Today, however, these programs do not ensure that Canadians have ample access to the books that are being written and published in this country.

With the exception of Quebec, there are few, if any, effective government policies that ensure students’ access to a broad range of Canadian-authored children’s and teen books in classrooms and school libraries. And few, if any, public library systems have policies in place calling for wide access by their patrons to Canadian books. The individuals who work in schools and libraries are often personally very committed and supportive of Canadian books and writing, but the organizations and institutions they work for have not entrenched that commitment in policies and priorities.

3. Lack of appropriate structures and practices for Canadian books

The third major finding of this report is that there are surprisingly few instances where the existing book distribution channels have structures and practices in place that adequately connect Canadian readers with Canadian-authored books. Within the book supply chain, there are specific structures for the distribution of specific products. In retail bookselling, for instance, full-priced new and backlist trade books move through one distribution channel, while off-price “remainder” titles move through a different channel, with different suppliers, trade practices, discounts, and margins. In public libraries, books are selected and acquired through wholesalers or retailers, while audiobooks and e-books are usually selected and acquired through different, specialist suppliers.

The structures currently in place treat Canadian-authored materials the same as all others. Due to the numbers involved, Canadian books become a smaller and smaller presence in the stream of new books appearing in all distribution channels, and they become harder to notice. Moreover, there are significant economic factors at work that lead some actors in these channels to favour imported books.

When participants in the book distribution system do choose to differentiate between Canadian and non-Canadian books in their purchase decisions, they often rely on a

separate channel to provide the service. An example is the Forest of Trees awards program, which promotes the reading of selected Canadian-authored children's and teen books. It has established a separate supply chain structure for promoting, purchasing, and supplying these books to participating schools and libraries. This structure runs in parallel to the supply chain used by school and public libraries to acquire other classroom and library books.

One important structural component of the book distribution supply chain is the maintenance of buying budgets. All distribution players track their activities against their budgets. A distribution channel dedicated to handling Canadian-authored books would have its own budgetary line in institutional budgets, and the performance of that product category would naturally be tracked to measure the relationship between resources and results.

Our proposals: key sectors

Our analysis sparked many ideas and proposals for innovations and interventions to address these findings. Varying in their time frame, impact, and feasibility, they can be grouped roughly by sector.

Recognize and strengthen independent bookstores as key cultural players and champions of Canadian writing and books

Despite a widespread impression that independent bookstores are disappearing in the face of big box retail and online competition, we learned that the stores that have survived across Canada are prospering. The nature of their business favours Canadian writing, particularly books from independent publishers. Overall, nine per cent of the books they sell are Canadian-authored books from independent Canadian publishers. (The percentage of independently published books sold by all other channels, such as chain bookstores, online bookstores, wholesalers, and other retailers, is four per cent.)

Successful independent bookstores have reinforced their positions as cultural spaces in their communities in a variety of ways. Most are now active organizers of public events featuring authors, often local or regional authors, and many have school book fair operations. Apart from sound business practice, these ventures are undertaken by independent booksellers because of their commitment to books and reading and the quality of life in their towns and cities.

Recognizing that commitment, we urge governments to take advantage of an available opportunity and offer independent bookstores the support that would allow them to make an even greater contribution to the awareness and reading of Canadian books. Supporting independent bookstore–organized events featuring Canadian authors and the use of digital outreach vehicles such as social media, websites, and email to promote Canadian books would be a low-cost, highly effective initiative. It would be popular with consumers as well as with writers and publishers. We propose several policy measures in this area.

We also found there is great potential for independent bookstore start-ups across the country. Publishers, authors, and local communities all stand to gain from start-ups, and we see a role for publishing industry organizations to encourage and support this trend. We propose a target of 50 new stores in the next 5 years, and we identify industry initiatives and public policies that would help ensure that target is met.

[Introduce a wealth of new quality Canadian books to school classrooms and libraries](#)

Most Canadian classrooms and most school libraries are starved for Canadian books. The situation is so widely acknowledged that it has prompted charities to raise funds for books that governments think they cannot afford. The issue is one of structures, infrastructures, and processes in addition to funding. We noted the success of the Tree awards program in several provinces, an initiative that puts quality Canadian books into young peoples' hands and leads them to actively engage with those works. We propose a number of industry and government measures that would build on the Tree awards programs in ways that would be welcomed and supported by teachers, students, and parents across the country and that would ensure students have access to quality Canadian books across a wide range of subjects and genres.

A significant source of books already in place in Canadian schools is the school book fair. At present the school book fair is primarily a market served by Scholastic and includes a range of materials, including books and non-print merchandise. We propose that this channel be regulated by provincial governments to provide better access to Canadian-authored books and to give independent bookstores offering a broad selection of Canadian children's and teen books a larger role in mounting school book fairs if they are able to find financially viable ways to do so.

Harness the power of public libraries to raise awareness and readership of Canadian books

Public libraries have always reflected civic policies around freedom of expression, literacy, and the social and cultural value of books in their operations. Public library systems are powerful institutions, creating awareness of books and authors and offering readers free access to them. It is surprising that few public library systems have articulated their commitment to the discovery and rewards of Canadian-authored books as a policy goal, even though librarians and library systems today play a large role in creating awareness and providing access to Canadian-authored books.

We believe that public libraries can be central to raising the awareness and increasing the reading of Canadian books, and we have identified several measures that would produce this result. They include adopting explicit policies regarding Canadian books, establishing budgets for implementing those policies, setting targets that implement those policies, considering the value of using a separate channel for selecting and acquiring Canadian materials, and measuring and reporting on implementation of those policies. The potential of public libraries to make a difference is so great that we believe it calls for a new component in federal book-support programs to support a major expansion of public libraries' role in creating awareness of Canadian-authored books and offering Canadians much greater access to a wide range of them.

Universities

With 1.7 million university students and 46,000 full-time faculty, Canadian universities have a major social and economic presence in Canadian life. University libraries offer a very wide range of books and other reading material, spending more than \$300 million every year to acquire digital and print content of all kinds. While the mission of Canadian universities embraces a cultural as well as an educational role, this has not yielded policies and practices that place special value on Canadian content within university libraries. In the context of a strong move from paper to digital, Canadian university presses and academic publishers have worked with university libraries to develop initiatives to put comprehensive collections of Canadian-authored e-books into all university libraries. There was an initial successful effort, but ongoing efforts have yielded only modest results. There is a need for action here and for parallel work on the structures of bibliographic database infrastructure to make Canadian material easier to discover.

As one of their many activities, all Canadian universities operate bookstores. A surprisingly large number of these stores are currently managed by a US-based campus bookstore operator, even though federal cultural policy prohibits foreign ownership of Canadian bookstores. As well as supplying students with textbooks and university-branded products and giftware, campus bookstores have displayed and sold other books selected by bookstore buyers to appeal to campus-based book readers. These have been trade bookstores within a store.

However, this function has increasingly been downgraded or eliminated on many campuses. We see an opportunity for universities across Canada to follow the best practices still evident on some campuses to operate a trade “store within a store” and contribute to their communities with a lively trade bookstore emphasizing Canadian books and authors. This development would need to be reflected in a different mission for university bookstores – one that focuses on educational and cultural contributions rather than earning revenues parallel to those of the food franchises operating on many campuses – and a reporting structure appropriate to that mission.

When it comes to the use of Canadian-authored material in courses, we found no information about its prevalence. The current dispute between universities and publishers and authors over “fair dealing” may be inhibiting – or promoting – greater use of Canadian materials. There is a need and an opportunity for a new digital infrastructure that makes Canadian books easier to discover and use in course materials in universities and community colleges.

Overall, in libraries, bookstores, and course materials, universities have an opportunity to play a much greater role in creating awareness and providing access to Canadian books. We believe that steps in this direction would be welcomed within the universities and the wider community.

[Collaboration with CBC Radio and CBC Digital to achieve mutual goals](#)

One inescapable cause of the decline in reading of Canadian books is a lack of awareness of the books that are being published. Awareness arises from many sources; according to reader surveys, browsing bookstore and library shelves and displays is the single most powerful source of awareness. Social media are rapidly growing in influence, while mainstream media remain important.

CBC Radio and CBC Digital are both powerful media in English Canada, reaching sizable audiences across the country. The demographics of book readers align closely with the demographics of CBC Radio listeners. Books and authors are a proven source of high-value, high-interest content for radio programmers. We have proposed a number of initiatives that would allow CBC Radio easier access to Canadian authors and to the engaging, informative, and newsworthy content their works represent.

CBC has been innovative in creating CBC Books as an aggregator of digital, radio, and television book-related programming. We have identified opportunities for CBC Books and CBC Digital to increase their content about Canadian books and authors, and to reach readers with that content, in ways that benefit both the CBC and Canadian-authored books. In working with the book industry on these initiatives, the CBC would be achieving the mission that accompanies the funding it receives as an instrument of Canadian cultural policy.

Develop a new generation of digital infrastructure

Throughout our analysis of the book supply chain, we found an urgent need for digital infrastructure that will allow the book industry to handle rich, detailed information about Canadian books and authors, track the presence of Canadian books, and support Canadian books with greater visibility and accessibility. Developing this kind of digital infrastructure for the various components of the book business does not mean starting from scratch. The need is for enhancements and improvements – the next generation of software and standards.

For each of the sectors we examined, we have proposed specific recommendations for digital infrastructure that will provide strong support for Canadian authors and books. These enhancements are not without costs in resources and time, and not all suppliers of digital software are open to the work involved, even if fairly compensated. One reason is that Canadian customers often constitute a small fraction of a software supplier's customers. In some cases, a made-in-Canada software solution may be needed when foreign suppliers are unresponsive. It's important to note, too, that Canadian-developed software may likewise need enhancement to respond to the needs of Canadian books and authors. Investment in a new generation of software would be a one-time but essential expense, and funding support from governments is a one-time cost that will yield years of ongoing advantages to Canadian cultural and literary endeavours.

Adapting a successful cultural policy: the benefits of accredited bookstores

Our final policy and program proposal touches on all of the sectors under discussion. The establishment of an accredited bookstore system – which has been in place in Quebec for more than 20 years – would affect bookstores, particularly independent bookstores, publishers, authors, public libraries, university libraries, and schools.

The accredited bookstore policy is based on a decision to use public spending on books to ensure that the general public, as well as students in the public education system, have ready access to Canadian-authored books. Implementing an adaptation of the Quebec model would greatly help reverse the current declining presence of Canadian-authored books in our cultural and educational life. In the approach set out in this document, accreditation would lead bookstores, primarily independent bookstores, to give more shelf and display space to Canadian books.

These stores would constitute a separate awareness and distribution channel where schools and libraries could discover and purchase Canadian books. Using this channel, new funds for Canadian book purchases by schools and libraries – also a recommendation of this report – would buttress independent bookstores as businesses and support the emergence of more stores in more neighbourhoods, communities, and towns across the country. Further, the policy would benefit book readers and book buyers, including children and teens in schools and public library system users in every province.

The accredited bookstore model challenges virtually all sectors in the book supply chain to operate differently than they do today. However, it is clear that, without change, the place of Canadian books in Canada will continue to diminish.

The need for action

It is clear to all of the think tank participants that the efforts of the past to encourage awareness and reading of Canadian books – by publishers promoting new titles, by industry groups undertaking collective marketing initiatives, by bookstores and libraries seeking to encourage users to “Read Canadian,” by volunteers and organizers of public book events and activities – are no match for the vastly greater inflow of new books from other countries, which are aggressively marketed in Canada by their publishers and heavily promoted by the media everywhere. That is the undisputed experience of the last decade.

This policy paper contains specific proposals for measures that, taken together, will halt and reverse this trend. Why should this be done? The evidence is that the Canadian public likes and admires our own authors and our own books. The high quality and breathtaking range produced by Canadian writers in every genre is undisputed. Measures to increase the visibility and presence of Canadian-authored books – their “discoverability” – in libraries and bookstores and schools are certain to be welcomed if such measures are well designed and well executed.

Governments have articulated hallmark policy goals and instituted programs that foster quality Canadian writing and publishing. These goals and programs have successfully sustained the creative and production side, but they have fallen short of ensuring that Canadian books stand out in bookstores, libraries, and the media – the last steps to ensuring that policy goals are fully realized.

The public, and governments, look to book industry professionals to offer information and advice on how public policy can achieve the objectives that are set by governments acting in the public interest. This document is offered in that spirit. We hope and expect that others will add their voices and their views to a discussion about how the decline in awareness and readership should be addressed.

We hope, too, that this report will generate public awareness that Canadian books are at risk of losing their visibility and their readership. Action is needed from governments, public bodies, agencies such as education systems and public library systems, and the book industry. We Canadians enjoy access to the literature of the whole English-speaking world; we should have the easiest access to books of our own.

Introduction

This is a great time for Canadian literature. There are more authors writing and publishing with greater appeal and quality than ever before. Our best writers have won international acclaim and awards, capped by Alice Munro's Nobel Prize for Literature. Canadian authors are successfully publishing in virtually every genre, from bestselling children's picture books to cutting-edge scholarly research.

Recognition of this accomplishment is at the heart of Canada-Frankfurt 2020, which will showcase Canadian books and authors at the 2020 Frankfurt Book Fair and during the year following at book and cultural events throughout Germany. This project will encourage publishers around the world to translate Canadian books of all kinds, increasing the global audience for our literature.

With the help of federal and provincial governments who have invested tens of millions of dollars in the development and production of Canadian-authored books, the Canadian-owned independent publishing sector is financially stable and editorially robust. Independent publishers are the source of 80 per cent of the new books by Canadian authors published every year in English Canada. (In French-language publishing, Canadian-owned firms play an even larger role and are equally successful as businesses.)

Independent firms and the branch plants of multinational companies combined release about 3,500 new English-language Canadian-authored titles every year. Book publishing houses are located in every Canadian province and territory, and authors located in hundreds of Canadian communities, large and small, see their books professionally published each year.

Over the past decade, the greatest area of growth for Canadian books has been export sales. The majority of independent Canadian publishers are now active and mature exporters, selling both translation rights and finished books, as well as digital and other subsidiary rights, and earning significant revenues from all.

And yet, this flourishing of writing and publishing in English Canada is at risk and under threat. The reason: Canadians' awareness of Canadian books is in decline. Canadians are less aware of the books being written and published here at home, and they are buying and reading fewer of them than they did 5, 10, or 20 years ago.

Book reading as a leisure activity remains stable in Canada, unlike newspaper and magazine reading. The issue is not a decline in book reading generally; it is a decline in the reading of Canadian books. More books are being written and published in English Canada, but Canadians are reading fewer books by Canadian authors – and more books by foreign authors.

Why has this happened, and what can be done about it? These are the questions this document seeks to answer.

The decline in awareness, purchasing, and reading of Canadian-authored books has been felt by many of those involved in writing and publishing, including authors, author agents, and independent Canadian publishers, but until now it has not been formally studied to understand the causes or possible remedies. In September 2016 a group of publishing colleagues decided to undertake an initiative to attempt to analyze this situation and to propose actions to address it.

We organized ourselves as an independent think tank of volunteers, with a common desire: to strengthen the presence of Canadian expression in the world of books – including the writing and publishing of Canadian books, of course, but also the discovery by Canadians of the worth, relevance, and pleasure these books offer. Our vision is fully in line with the key objectives of Canadian cultural policy, as articulated by federal and provincial government publishing policies. It also aligns with the objectives of book trade associations, including the national and regional independent publishers' associations and promotional organizations such as the Canadian Children's Book Centre and eBOUND Canada.

The think tank approach is a novel one for the book industry, but in other sectors of Canadian life this model has proven to be an effective way to introduce research, analysis, and policy proposals to the public forum. The individuals who have contributed to the research and writing of this document have done so not in any official capacity, but as individuals with considerable experience and knowledge and a shared commitment to the value and importance of Canadian cultural work. This report is an independent one, offered for discussion and debate within the organizations, institutions, and businesses involved with books.

In the course of our work, we considered the influence of various sources of book awareness, traditional and new, and we grappled with the question of how Canadian-authored books could achieve higher visibility through these sources. Our discussions produced the proposals and calls to action set out in this report. All of these strategic initiatives could have a significant positive impact on awareness and readership and could realistically be put into place in key awareness and distribution channels. We also identified an urgent need to upgrade the book trade's digital infrastructure to raise the profile and accessibility of Canadian books through all channels.

The findings of a 2017 BookNet study, *Canadians Reading Canadians*, underline the importance of taking action. A healthy 43 per cent of women and 46 per cent of men reported reading a book by a Canadian author in the previous 12 months. Some 21 per cent of women and 30 per cent of men said they had not. But 37 per cent of the women surveyed, and 24 per cent of the men, reported that they didn't know or were unsure whether they had read a Canadian book (BNC Research, *Canadians Reading Canadian* [BookNet Canada, 2017], 7). There was a strong positive response from all three groups when questioned about their interest in reading books by Canadian authors generally (12).

These numbers point to the desirability of finding better ways to identify Canadian-authored books as Canadian in bookstores and libraries and to the fact that book readers are looking for and would welcome these initiatives. Doing so would take advantage of – and serve – the positive attitude of Canadian readers toward Canadian books. The findings also suggest that displays, promotions, recommendation engines, and other awareness mechanisms would generate positive responses if they prioritized Canadian-authored books and if that feature were highlighted among books being promoted.

This report focuses on awareness, distribution, and readership in the English-Canadian book industry and proposes changes in the operation of important channels for all three. But it leaves aside two of the most powerful channels in the book supply system: chain retail bookselling and online bookselling.

Chapters/Indigo remains the dominant source of books purchased by English Canadians, though market share numbers vary from study to study. In a 2017 Atlantic Canada survey, for instance, 71 per cent of book buyers reported that they buy books from bricks and mortar bookstores. Chapters/Indigo accounted for 81 per cent of this bookstore purchasing and independents 19 per cent in the Atlantic region. Half of these book readers also reported buying at big box retailers and 36 per cent from online bookstores (Atlantic Publishers Marketing Association, *Atlantic Books Today Reader Survey* [2017]).

A national BookNet survey of book buyers found that 48 per cent of book purchases were from bricks and mortar stores of all kinds, compared to 41 per cent from online stores (BNC Research, *How Canadians Buy Books 2015* [BookNet Canada, 2016], 28). Its physical presence in every large- and medium-sized city, plus its power as an online vendor, make Chapters/Indigo the most important retailer in the English-Canadian book market.

Chapters/Indigo management has faced enormous hurdles since the merger of the two competing big box retailers was permitted by the Competition Bureau in 2001: competing leisure-time products, the threat posed by a possible transition from paper to e-book format, and, most importantly, online competition and discounting from Amazon. Today, business analysts regard Chapters/Indigo as a retail survivor, with its stock price in early 2018 hitting its highest level in many years. But its management has been steadily transforming the enterprise from its original position as a chain bookstore to a gift retailer with a strong offering of full-price and off-price books alongside a range of lifestyle merchandise.

It is reasonable to expect that Chapters/Indigo would respond to shifts in consumer interest toward Canadian-authored books, as it has to interest in local and regional books in some parts of Canada. In BC and Atlantic Canada in particular, the chain has collaborated with local publishers by stocking and promoting local-interest books. However, Chapters/Indigo as an organization does not have a cultural mission, it does not have a public policy role, and it does not operate as a social enterprise combining business objectives with social or cultural goals. In our view, Chapters/Indigo does not have the same potential to be a “first mover” in addressing the awareness and reading gap facing Canadian books as do other channels, where public policy and cultural concerns are more evident.

Online retailing poses a somewhat different challenge. Since 2010, when the federal government allowed Amazon to expand its bookselling activity into Canada under the Amazon.ca banner, the online behemoth has quickly become the dominant online retailer. For five years after 2010, Amazon operated under the constraints imposed by the “net benefit” provisions negotiated with Ottawa. Exactly what those benefits were was never fully clear, though Amazon itself announced some of them.¹

Amazon staff based in the US and assigned to operate Amazon.ca travelled to Canada to meet with publishers collectively and individually. No significant collaboration around priority or privileged position for Canadian-authored books emerged during the five-year period, nor did expressions of interest in working with Canadian publishers on issues relating to awareness and readership of Canadian books bear substantial fruit. Our

evaluation of this experience leads us to expect it is unlikely that any initiatives we might propose would be taken up by Amazon.

As with Chapters/Indigo, Amazon could prove responsive to changes in consumer demand for Canadian-authored books or for greater visibility for Canadian books, but only if the nature of the English-language book market in Canada changes. And those changes, we believe, are only possible through the collective initiative of organizations in the book supply chain whose primary commitment is to Canadian books and Canadian creative work generally.

Those organizations soon emerged and became the focus and heart of this report: independent bookstores, public libraries, school classrooms and libraries, universities, and the national public broadcaster, specifically CBC Radio and CBC Digital.

Canadian-Authored Books in Canada

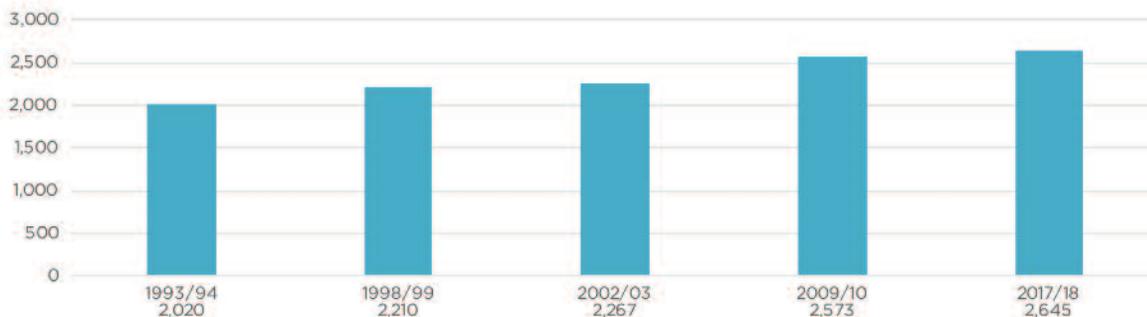
A brief history

The background for our think tank discussions was a widely shared sense on the part of writers, publishers, booksellers, and others in the book trade that awareness and reading of Canadian-authored books has diminished in Canada over the last period of years. This trend has not been widely noted or documented. We found many studies and reports that cast some light on this development, but no authoritative summary. We have assembled data from a variety of sources to describe this development. None of the statistics we present here tells the whole story. The data sources we are using all have their weaknesses and limitations. Nevertheless, an overall picture emerges.

English-language Canadian-owned publishers have modestly increased the number of new Canadian-authored trade books they are publishing annually over the past 25 years. Chart 1 shows the number of titles published for selected years, beginning at about 2,000 new titles in 1993–94 and increasing to about 2,600 in 2017–18. We found no good data for the number of Canadian-authored trade titles published by the multinationals over the same period, but it has definitely increased significantly.

CHART 1

Canadian-authored trade titles published by English-language Canadian-owned publishers, 1993/94 to 2017/18



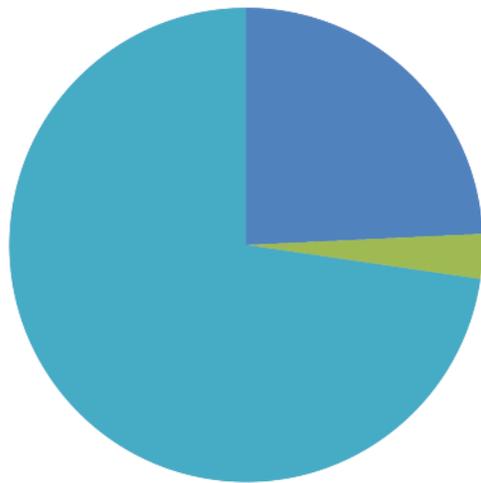


CHART 2
New English-language Canadian-authored trade titles published in 2017 by publisher type

- Multinational branch plants (851 titles; 23%)
- Foreign publishers (107 titles; 3%)
- Canadian-owned (2,551 titles; 73%)

Chart 2 breaks out the number of new Canadian-authored titles published in 2017 by independent Canadian publishers, multinational publishing branch plants in Canada, and foreign publishers. This chart, drawn from BookNet SalesData reports, shows the Canadian-owned publishers releasing 2,551 new titles compared to 851 for the multinationals and 107 for foreign publishers.

While these 3,604 new titles were published in the 12-month period covered by the chart, 77,721 new titles by foreign authors came into the Canadian market. Those books were distributed and marketed here by the multinational publishers operating in this country and by foreign publishers exporting to Canada. Canadian-authored books made up just 4.6 per cent of all the new titles available for sale in Canada and promoted to readers by their publishers (see Chart 3). Canadian-authored books represented 4.5 per cent of all the books reporting trade sales of one copy or more in 2017 (Chart 3A).

CHART 3
New English-language trade book titles published and distributed in Canada in 2017



CHART 3A
All trade book titles with sales of one copy or more in English Canada 2017



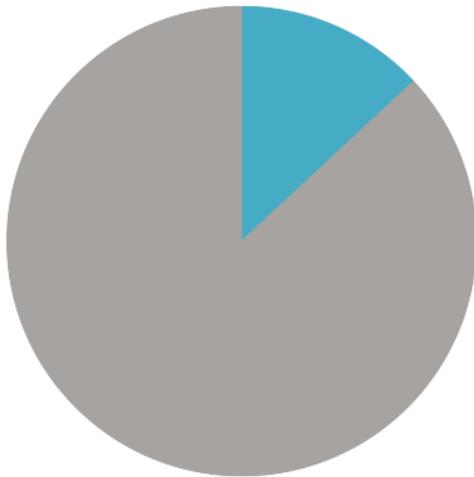


CHART 4

All Canadian-authored trade books share of total retail sales 2017

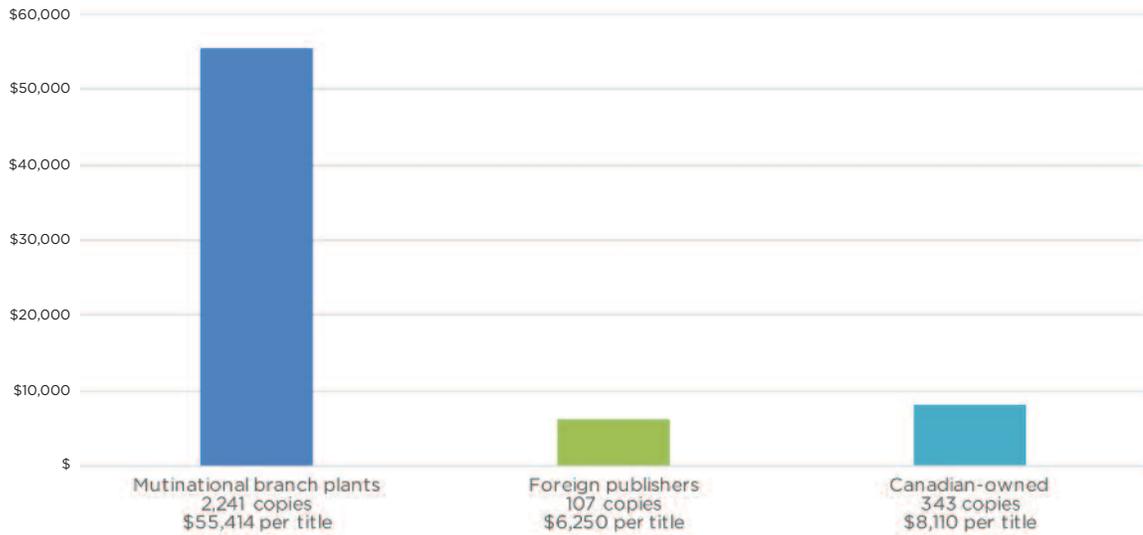
- Canadian-authored (\$136 million; 13%)
- All other (\$898 million; 87%)

Canadian-authored print books had retail sales of about \$136 million, out of total print book sales of \$1.03 billion in 2017, in retailers reporting to Booknet. (Chart 4). These figures reflect a high percentage of total retail trade book sales, though they do not include many small retailers, and they also omit most Amazon sales. (E-book sales are not reported in the sales data made available to BookNet Canada, and so they are not reflected in all the statistics coming from BookNet.) Canadian-authored books represented 13 per cent of those book buyers' purchases in dollars and about the same in terms of numbers of copies. Overall, one out of about seven books purchased in English in Canada in 2017 was by a Canadian author.

There is an enormous gap between the performance of Canadian-authored books published by the multinationals and those published by independent Canadian publishers. As noted elsewhere in this report, the multinationals have been successful at capturing the preponderance of bestselling Canadian authors and manuscripts. Independent Canadian-owned publishers publish by far the largest number of new titles. In 2017, titles in that calendar year by independent publishers in their first year of publication sold an average of 343 copies. In comparison, the titles in their first year of publication by the multinationals sold 2,241 copies in 2017. As Chart 5 shows, the average sales of a 2017 multinational-published title in its first year of publication was \$55,414 compared to \$8,110 for the independently published titles. These titles go on to have additional sales in future years and typically achieve lifetime sales that go well beyond the first season sales, but the gap between the two groups of titles remains.

CHART 5

Average first season sales of new English-language Canadian-authored titles in 2017



The wide array of all new and backlist Canadian-authored titles in virtually every genre from the independent publishing sector produced total sales in BookNet-reporting retailers of 2 million copies (3.9 per cent), worth \$35 million at retail in 2017. Canadian-authored titles from the multinationals produced sales of 4.5 million copies (8.7 per cent of all copies of trade books sold) worth \$100 million at retail (Chart 6). So Canadian-authored books accounted for 13.6 per cent of total books sold in 2017.

Canadian-owned publishers also publish foreign authors, and combining all these sales (see Chart 7), these publishers made up 4 to 5 per cent of total book sales in English in Canada over the years from 2009 to 2017.

When we look more closely, (see Chart 8), we see that Canadian-owned publishers' total retail trade sales in Canada are shrinking significantly, from around \$60–65 million in 2009–2013 down to around \$50 million in 2015–17.

Tracking copies sold to a consistent group of bookstores and wholesalers for the period 2009 to 2017, BookNet reports that Canadian-owned publishers saw the number of books sold to those customers decline from 3.7 million units to 1.8 million units, a decline of more than 50 per cent over nine years, as Chart 9 shows.

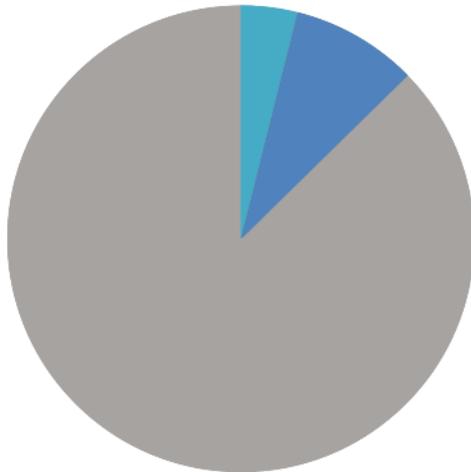


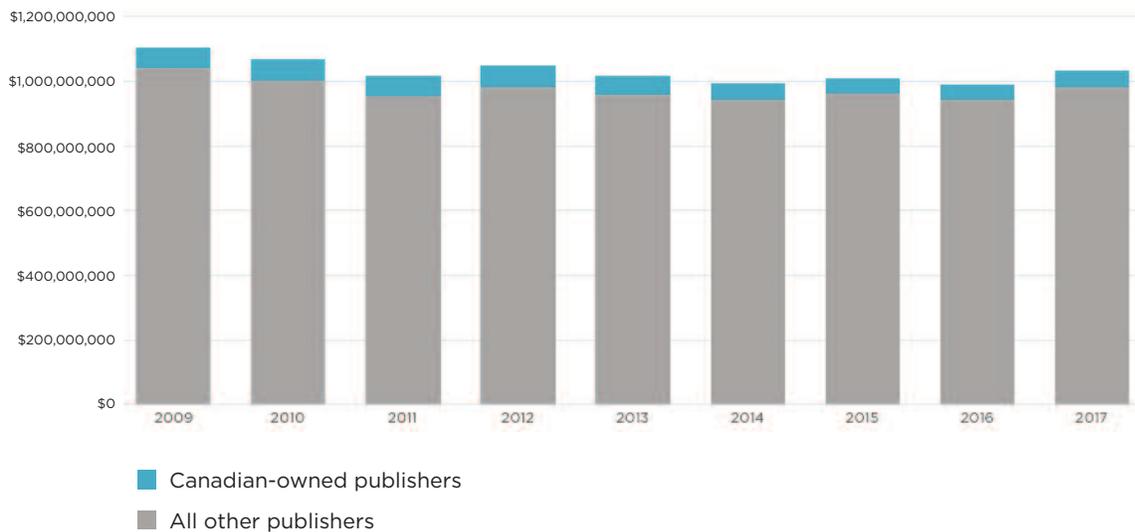
CHART 6

Canadian-authored books by publisher type, share of English-language trade books sold in 2017

- Canadian-authored published by Canadian-owned (3.9%)
- Canadian-authored published by multinationals and foreign (8.7%)
- All other books (88.4%)

CHART 7

Canadian-owned and all other publishers, English-language retail sales (list \$)



Taking a broader view of Canadian-owned publishers sales to include learning materials and some technical books, as well as e-books (sales that are reported to the Canada Book Fund every year), there is a steeper decline in these publishers' total domestic sales, from around \$126 million in 2008–09 to \$71 million in 2017–18 (Chart 10).

CHART 8

English-language Canadian-owned publishers, retail sales (list value) 2009-17

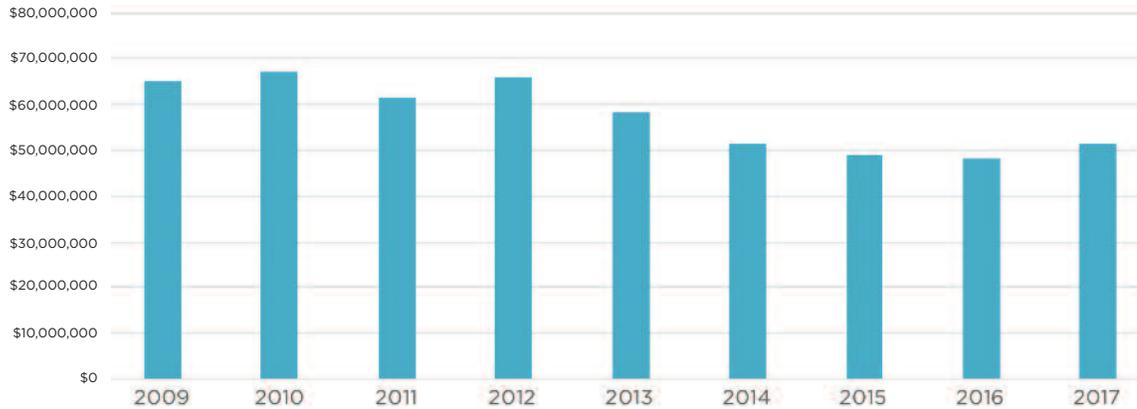
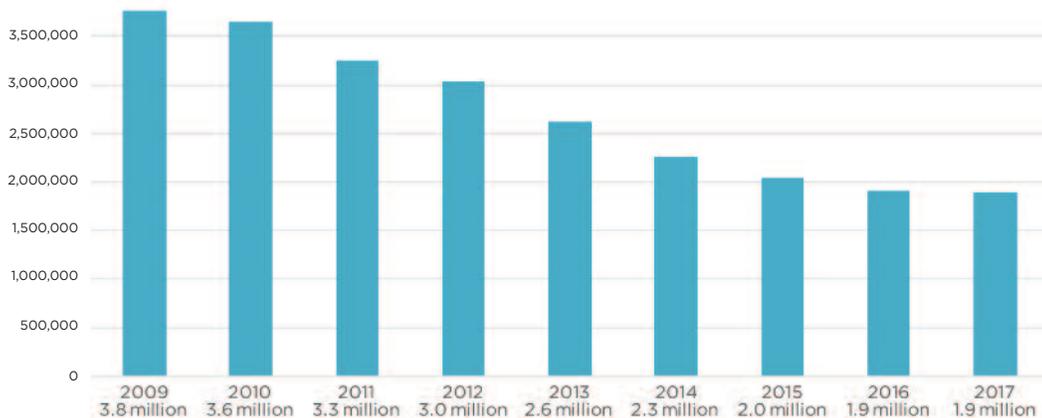


CHART 9

Total trade book copies sold (to ring fence group) by English-language Canadian-owned publishers



The decline over a 12-year period is 44 per cent. As Chart 11 shows, export sales contribute a substantial amount to total Canadian-owned publishers' sales of Canadian-authored books, and this is particularly evident in the 2017-18 numbers. This has blurred the impact of the decline in domestic sales for many publishing houses that have seen their sales maintained or increase over the period. Publishers have benefitted from continuing export sales and from higher revenues, due in part to the decline in the Canadian dollar, while sales in Canada continue to decline. Combining domestic and export sales, the decline over the period is reduced to 22 per cent.

CHART 10

Canadian-owned English-language publishers, total domestic sales, all Canadian-authored titles, 2005-18

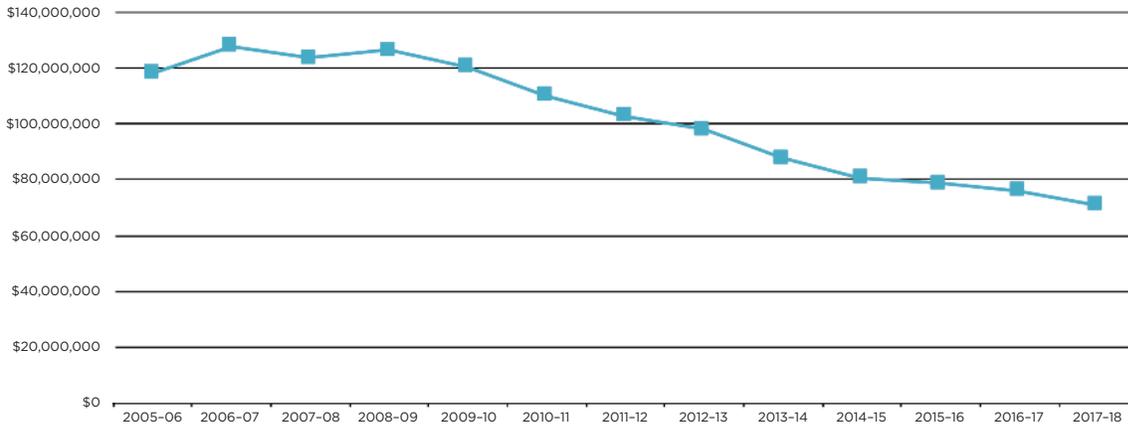


CHART 11

Canadian-owned English-language publishers, export and total sales of Canadian-authored books, 2005-18

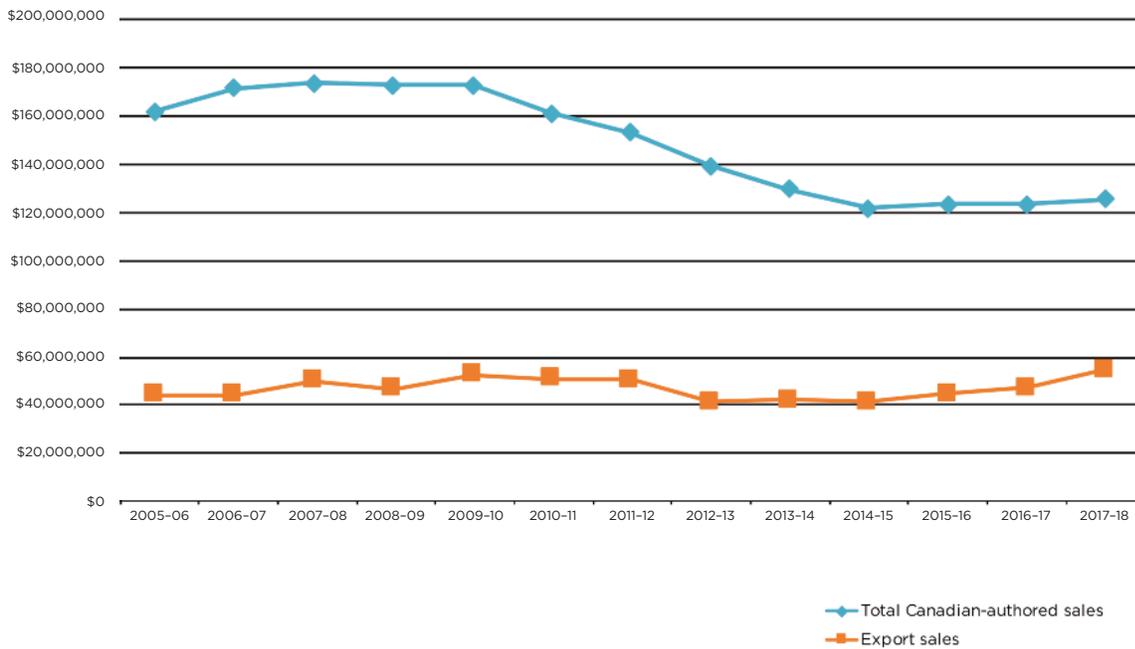
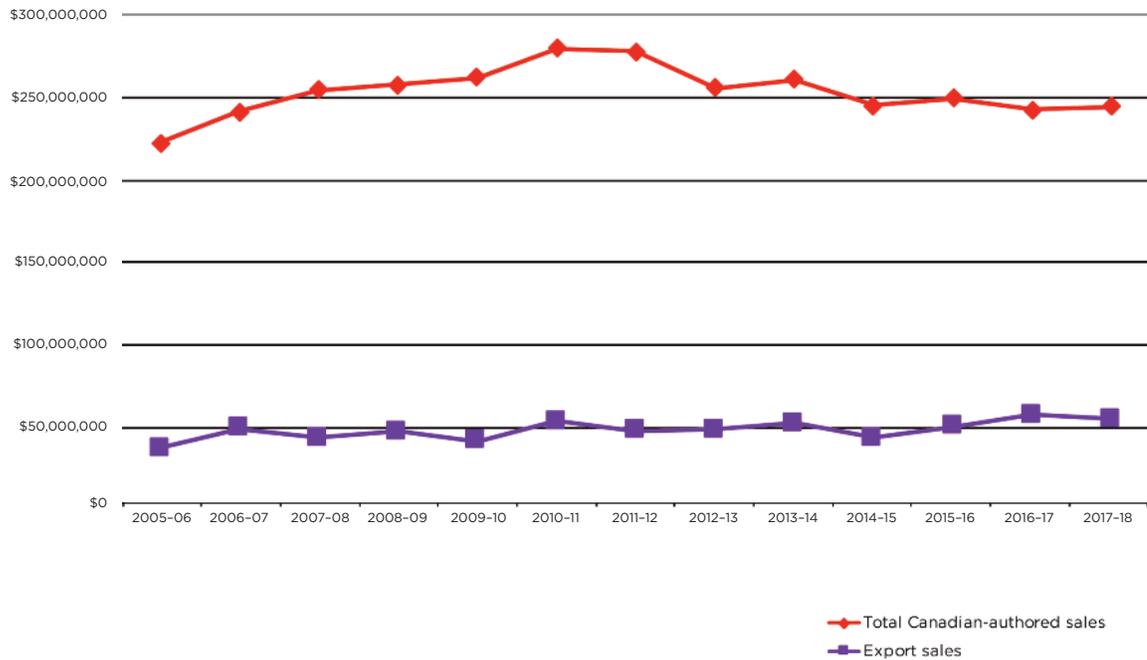


CHART 12

Canadian-owned French-language publishers, export and total sales of Canadian-authored books, 2005-18



A quick comparison to the experience of French-language Canadian-owned publishers (see Chart 12) shows that they also have experienced a decline in total sales of Canadian-authored books in the domestic market, moving from \$230 million in 2011-12 to \$190 million in 2016-17. The decline was 17 per cent, considerably less than the 44 per cent in English Canada.

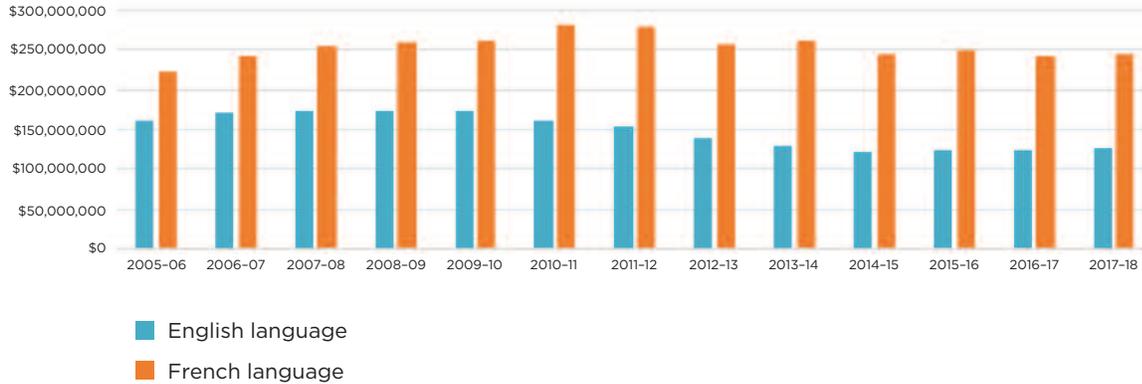
As with English-language books, exports have been strong but there has been no recent increase (Chart 13).

A decline in Canadian-owned publishers' sales of Canadian-authored books in Canada is a strong indicator of a decline in Canadian book reading. But it is an indirect indicator. The data that would provide a direct measure of this phenomenon is statistics on the leisure reading of Canadians, and in particular how much of what kinds of books Canadians are reading.

There is good survey data about the amount of time people spend on leisure reading of books – and this time commitment has held up well in the face of challenges from all forms of screen-based leisure activities. What is not measured is the authorship and other

CHART 13

Total Canadian-authored book sales by English-language and French-language Canadian-owned publishers, 2005-18



specifics of the books people are reading. There is currently no ongoing reporting on the types of books Canadians are reading, as opposed to what they are buying. We have to rely on a variety of one-time reader studies and surveys to answer this question.

A major Statistics Canada study of reading carried out with a very large sample in 1978 found that Canadian books then accounted for 16 per cent of reading. Studies in the 1980s and 1990s pointed to the fact that this number had increased significantly. However, in 2005 a major study put Canadian-authored books at 27 per cent of purchases and 12 per cent of reading. A small survey in December 2017–January 2018 put the number of Canadian-authored books read by that sample at 12 per cent for Atlantic Canadian readers (Chart 14).

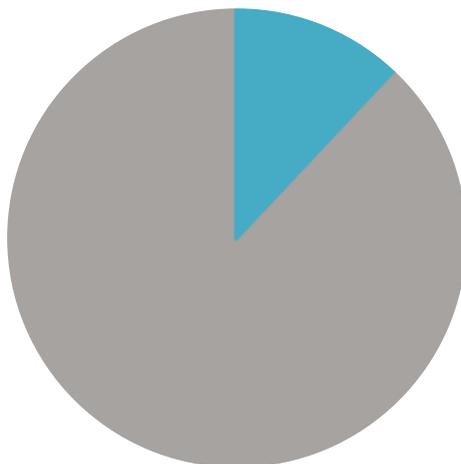


CHART 14

English-language Canadian-authored book reading, sample survey, January 2018, Atlantic Canada

- Canadian-authored (12%)
- All others (88%)

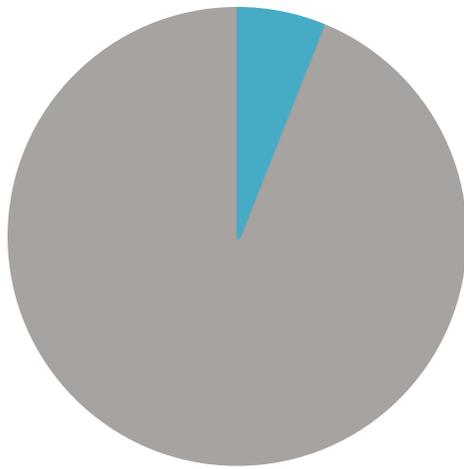


CHART 15

English-language Canadian-authored book reading by public library users, sample survey, April 2018

- Canadian-authored (6%)
- All others (94%)

A small survey of public library users in April 2018 found that Canadian-authored books represented six per cent of the books borrowed from the libraries in the sample (Chart 15). The available data indicates that there has been a substantial reduction over the past two decades, but they do not enable us to quantify that reduction. Canadians are now reading fewer Canadian-authored books – even fewer than they were reading in 1978, near the beginning of the dramatic growth and success of Canadian writers and books in Canada as well as abroad.

The diminishing presence of Canadian-authored books in English Canada can clearly be seen for the books published by independent Canadian publishers. The data is not so clear for the multinational publishers, but most participants in the book trade are aware of a gradual reduction in their publishing of Canadian authors as the sector has consolidated through mergers (Penguin Random House is the key example). The multinationals in Canada can easily fill their supply chain for books in Canada with the books their parents publish in the US, the UK, and elsewhere – and these sales earn very good margins.

The decline in reading of Canadian-authored books has not posed a threat to business operations of independent Canadian publishers. These publishers, as we note later in this report, have reacted to the shrinking domestic market by placing greater emphasis on book exports. Even though total sales are down, as already noted, Canada Book Fund statistics show that there is no financial crisis among Canadian-owned publishers; profits have been relatively stable over the past five years and average a reasonable six to seven per cent of sales.

The issue we are addressing is at bottom one that helps form the basis for cultural values and cultural policy: How important is it that Canadians can find out about, discover in online bookstores and digital catalogues, and get easy access in bookstores and libraries to Canadian-authored books? How important is it that Canadians enjoy the national literature that writers and publishers are creating? What value do we, as a country, place on ensuring that our citizens know about our own writers and our own books? Do we want to ensure that Canadian readers are discovering our stories, our history, our places, and our peoples as they are reflected in our books?

When public policy supports publishing, as it does at the federal level and in every Canadian province, this is done to ensure that Canadians do have books of their own – and that these books reach Canadian readers young and old. The data we have shows that the books are being written and published. But awareness of the books and reading them is in decline.

The participants in this think tank shared a commitment to the value and importance of Canadian books, and on finding ways that this slow but steady decline in the awareness and reading of Canadian books can be recognized, addressed, and reversed.

We turn now to describe and attempt to analyze the causes of this development, and to consider what can be done.

Independent Bookstores

Book retailing in Canada

Bookstores have long been the prime source of the books people purchase and read, and they remain so today. Bricks and mortar stores rank first as the source in Canada; online bookstores are second.

The history of book retailing in Canada encompasses both chain and independent bookstores. Along with outposts of the British bookstore chain W. H. Smith, English Canada had two successful homegrown national chains, both run by bold retail entrepreneurs who took advantage of the emergence of shopping centres as an alternative to traditional downtown and neighbourhood shopping strips in the 1950s and 1960s. Louis Melzack's upmarket Classic Bookshops chain and Jack Cole's unpretentious Coles competed by taking somewhat different marketing positions against Smiths. But every Canadian city and many towns also supported strong independent bookstores that collectively accounted for a greater share of total bookstore sales than any one of the chains.

Over the past 20 years, big box retailers, online booksellers, and a strategy of buying market share by heavily discounting bestsellers drove many independent bookstores out of business. Smiths withdrew from the market, Classics went out of business, and Coles was absorbed by the growing Chapters chain. The decline of independent stores accelerated when federal competition authorities allowed the merger of Chapters and Indigo, creating a single dominant national chain, and when federal cultural policy allowed an exemption to Canadian ownership requirements and permitted Amazon to enter the Canadian online bookselling market.

Today, most Canadians think of independent bookstores as a threatened species or a relic of 20th-century retailing. They are wrong: The decline of independent bookstores in English Canada is now reversing. There are examples of recent successful start-ups in many Canadian communities, in a surprisingly diverse array of locations, from Hamilton's

Locke Street to Lunenburg, Nova Scotia, and from Verdun, Quebec to the tiny community of River John, Nova Scotia. English Canada is served by over 300 independent bookstores. Most are healthy, viable businesses and many are highly successful. (Quebec boasts 250-plus independent bookstores, most French-language but with some English-language stores, too.)

There is no reliable data on the numbers of independent bookstores in English Canada and similarly no good data on their share of total book sales. However, there is good data documenting that they are more successful than other distribution channels in generating sales and readership for Canadian-authored books. While Canadian-authored books account for 13 per cent of sales through all channels, they represent 18 per cent of sales in independent bookstores reporting data to BookNet Canada. Put differently, independent stores are considerably more successful at creating awareness and generating readership of Canadian books than chains, other retailers, and online vendors.

The contemporary independent bookstore in English Canada

A successful independent bookstore today is quite different from its predecessors in the Coles-Classics-Smiths era.

Its new business model includes a role as a community cultural space, while its product mix has broadened to maximize sales and margins. Innovations in both areas have enhanced customer service and increased profitability:

Product range

- **Remainders:** Successful bookstores now mix new, recent, and bestselling backlist full-price books with an off-price offering of remainders. Remainder titles sell at much lower price points but earn better margins. They are often an upsell: well-selected remainders are a major attraction for customers who are also buyers of full-price books. In many instances, independent bookstores seek out Canadian-authored and Canadian-published remainders in order to diversify their overall selection of bargain books. And many Canadian publishers and distributors work closely with independents to ensure that overstock of Canadian-authored and Canadian-published titles are included in this growing market segment, exposing Canadian content to consumers who may exclusively purchase off-price offerings.

- **Non-book items:** Bookstores customarily carry non-book items, which can make up 20 to 40 per cent of store space and inventory. These generate incremental sales from customers and usually offer better margins than books. While the mix varies hugely in the independent sector, non-book items are normally selected to complement the activity of leisure reading.
- **Coffee and more:** A number of independent bookstores have a coffee or café feature integrated into their business or operating alongside it. As much for atmosphere and attracting traffic as for margin, this element adds to the overall appeal of the bookstore and enhances its role as a community gathering place.

Community building

- **Events:** Many independent bookstores have sizable special event programs through which they host in-store events for the public or take their bookselling activity out of the store to off-site events. The biggest independents count over 400 such presentations a year. This puts more books in front of more potential buyers and readers. It also reinforces the role of the store in its community's cultural life.
- **Book fairs:** A surprising number of independents mount book fairs in schools. They offer a wider range of books to children, teachers, and parents than is provided by Scholastic Book Fairs, the dominant national school book fair operator. Independent store book fairs build links between the bookstore and teachers as well as with parents and children.
- **Book news and recommendations:** Successful independent bookstores have always provided customers with knowledgeable and engaged staff who can offer individually tailored information about books and authors and make informed reading recommendations. This function is often enhanced with in-store display components (staff shelf-talkers, for instance) and print materials like Christmas catalogues. The digital revolution has allowed stores to maintain regular contact with customers through Facebook pages and other social media, websites, and email newsletters. Here, independent bookstores have an advantage over their national and online bookstore competitors because they can customize their digital and in-store activities to the specific reading interests of their customers. Independents have the knowledge and flexibility to identify and promote a Canadian-authored title, perhaps by a local author, that will outsell even the hottest international bestseller in that specific location.

Digital infrastructure made in Canada

Underpinning these strategic elements of contemporary bookselling, and its base business management, is the digital infrastructure that has been developed in English Canada for independent Canadian bookstores. Affordable and robust, these store-management systems are designed for Canadian retail's particular needs and circumstances.

Bookmanager software, the creation of Michael Neill of Kelowna's Mosaic Books, is the de facto standard software for Canadian independents, the equivalent of Microsoft in its market. It is used by some 300 independent bookstores across the country to track inventory, order books, generate information about titles in stock, report on sales, and support display and promotional activities. Its integrated functionality is now proving attractive to US independent bookstores as well, who compare it favourably to the software available from US suppliers.

BookNet Canada, another book trade essential, is an industry-led organization operated on behalf of the Canadian book trade to facilitate a variety of supply chain services. It supports efficient electronic document handling of orders and payments and also provides sophisticated inventory management matched to the interests of the bookstore's unique community and informed by the ongoing experience of other independents.

Through SalesData, created and maintained by BookNet, bookstores have access to reliable, accurate sales data from the full retail book market or from a relevant subset of the market, allowing independent stores to maximize sales and margins through access to up-to-date information. Bookmanager also supplies sales data, reporting sales information from a large group of participating independent bookstores.

This national digital infrastructure has been built by a combination of independent entrepreneurship and industry-wide non-profit enterprise. It gives Canadian independent bookstores access to services that equal the functionality and benefits of those of chain and national retailers. In doing so, it helps level the playing field between the chain, online, and independent bookselling sectors. Any new entrant in retail bookselling can access this digital infrastructure at an affordable cost, and making full use of it minimizes the risks involved in a start-up.

Bookstores and awareness

Bookstores have two related but distinct roles: First, they create awareness of books; second, they provide access to those books. Many leisure-reader surveys have documented the importance of discovering books by encountering them in bookstores – on the shelves, in displays, on tables. The physical book carries information about itself through its cover, title, jacket copy, and author biography – an immediate source of what is now termed metadata about the work. Bricks and mortar bookstore browsing and display are second only to word of mouth as vehicles for awareness of books among leisure-reading consumers.

Bookstores are uniquely powerful in their discovery role because a browser who learns about a book by finding it in a display or on a shelf can be converted to a purchaser (and ultimately a reader) of that book on the spot. There is no friction in the transaction – no need to look elsewhere for missing information, no waiting for delivery.²

It is useful to distinguish between what might be termed first-encounter awareness and second, or subsequent, reinforcing awareness. First-encounter awareness can arise from any source of book awareness. People acknowledge this phenomenon by talking about how they “discovered” a book or an author or a particular subject or genre. Some sources are especially powerful in sparking first-encounter awareness: The Scotiabank Giller Prize is an example of a high-profile literary award that creates first-level awareness far beyond what is typical for a Canadian novel. It is also very effective at converting awareness into readership. Bookstores and libraries are also major sources of first-encounter awareness, as is CBC Radio, as we point out later in this report.

While many customers arrive at a bookstore with a specific book or author in mind to purchase, they will commonly leave with another book they discover in the store or with the intended purchase along with an unintended one.³

Best business practices for all bookstores is to allocate shelf space based on sales. As sales of Canadian-authored books have declined, so too has their presence in bookstores. Fewer books on the shelves means lower levels of awareness and less reading. Probably because they are well attuned to the opportunities offered by Canadian-authored books and the interests of their customers, independent bookstores stock and sell a larger percentage of

Canadian-authored books than do other book retailers. However, there remains a significant gap between the number and variety of Canadian-authored titles on their shelves and the total range of new and recent Canadian books being published. Measures that increase readers' awareness of Canadian books and that increase independent bookstore sales of Canadian books will create a virtuous circle: the more titles stocked and displayed, the more awareness generated, and the more books sold and read.

Independent bookstores as a community cultural resource

Independent bookstores are a valuable community and cultural resource to the cities, towns, and neighbourhoods they serve. While each is a commercial business enterprise, their value to their community is partly reflected in their economic activity – the wages, rent, and profits – that they generate. There is a startling contrast in economic impact between purchases made in independent bookstores (and other bricks and mortar book retailers) and those made from online bookstores. Online book purchases generate no economic benefit in the communities where buyers live: no jobs are created locally, no property taxes are paid locally, and no-proprietor retailers often generate no HST, nor are there domestic corporate profits to tax.

Purchases made from foreign-based online considerations have received a lot of attention in some countries. A report in *Publishers Weekly* in April 2018 quoted the outgoing executive director of the UK Booksellers Association, Tim Godfray, about how public opinion has shifted to support for bricks and mortar stores over online retail: “We have been able to turn this around,” Godfray said. “Booksellers and their representatives now tell politicians that they are wealth generators, they create jobs, they nurture the culture, and they pay taxes.”

There is, however, an even stronger case to be made in the arena of public policy. An independent bookstore is a public good in the same way that a library branch or a performing arts space is a public good: It is promoting literacy, facilitating free expression, fostering creativity and artistic achievement, and enabling an informed citizenry. Most Canadians recognize the positive community and cultural contributions of an independent bookstore, even though that role has not been widely articulated or acknowledged by public policy in most provinces.

Further, while creating awareness of Canadian-authored books is part of their commercial business, doing so is itself a public good. Such activity reinforces and highlights the public investment that contributes to the creation of those books through financial assistance to writers and Canadian-owned publishers. In today's independent bookstores, Canadians can see the impact of their government's support for writing and publishing. There is an opportunity here for policy makers.

In Quebec, where awareness of cultural activity is particularly high, the constellation of benefits that independent bookstores represent has been recognized by public policy. Quebec's system of accredited bookstores, described more fully below, embeds and strengthens the role of independent bookstores in creating awareness and readership of Canadian-authored (not just Quebec-authored) books. In place for more than 20 years, it has been central to the survival of a strong independent bookstore network in that province during a time when the sector drastically diminished in English Canada and in other English-language countries.

A public policy strategy for independent bookstores

We believe that public policy should follow Quebec's lead and recognize independent bookstores as important cultural spaces that deserve support for their role in creating and sustaining community and in facilitating the discovery of Canadian authors and Canadian-published books. Independent bookstores could play a critical part in reversing the downward trend in awareness and reading of Canadian books in English Canada, just as they have in Quebec. There is an opportunity, and a compelling case, for public policy to enhance and strengthen their position as champions of Canadian writing and Canadian-published books.

Bookstores are commercial businesses, like publishing houses. They have to be financially viable to stay in business, like publishers. And the owner-managers of independent bookstores, very much like the owner-managers of publishing houses, are combining business goals with cultural objectives. Most are first and foremost book lovers, well aware of their community and cultural roles. We anticipate that many would welcome and take advantage of public policy initiatives that allow bookstores to play a larger part in creating awareness and readership of Canadian-authored books while strengthening their operations as businesses and encouraging more independent bookstores in underserved communities, towns, and cities.

Cultural support policies have in the past wrestled with the fact that the world of books is different from other cultural activities, such as ballet, opera, theatre, and the visual arts. In these creative fields, the supporting institutions are not owner-managed businesses but non-profit entities. Public agencies are more comfortable offering support to non-profits than to potentially profitable private businesses. Nevertheless, it has become accepted that independent book publishers, while they use the structure typical of owner-managed small businesses, have a vital cultural function and operate with a cultural objective alongside a commercial one – as “social enterprises” in fact, if not in name.

Independent bookstores deserve the same consideration. When they provide books for sale at public events or stage in-store author readings or promote new titles through social media or mount book fairs to encourage children and their parents to buy and read books, the case for offering support to allow more of these initiatives is easily made. We believe that support for bookstore activities that create greater awareness of Canadian authors and Canadian-published books would be a valuable and effective extension of current cultural policies and programs.

Enhancing the discovery of Canadian books in independent bookstores

Book- and author-promoting events are an effective, proven way to create awareness and generate book sales. Their influence reaches far beyond those individuals directly participating to larger audiences, who become aware of the related authors and books through the media or by word of mouth.

Independent bookstores report that the costs of mounting events are generally not recovered through direct sales, and event organizing is limited as a result. Offering funding to independent bookstores for a substantial portion of the direct costs of events featuring Canadian authors and Canadian-published books, particularly those from independent Canadian publishers, would allow stores currently committed to such programming to expand their activities. It would also encourage stores not yet active in events to initiate a program in their community, and it would be a valuable incentive to encourage independent bookstore start-ups.

Digital media offer a cost-effective way for independent bookstores to reach their customer base and to communicate information about new books and events. An obstacle to their greater use of these media is the lack of a demonstrable connection between effort

and incremental sales. Support for digital media outreach featuring Canadian authors and Canadian-published books would help remove this barrier and contribute to greater awareness of Canadian books overall.

There are programs at the federal level and in some provinces that offer funding to non-profit organizations, publisher associations, and individual publishers to promote and market Canadian-authored books, focusing on those from independent publishers. New components to these programs should be developed and funded to offer support to independent bookstores for events and promotions featuring Canadian-authored and Canadian-published books, especially books by authors who are local and regional to the sponsoring store. The proposal is:

1. Public funding to qualifying independent bookstores for staffing and other direct costs of events and awareness activities, including digital initiatives, featuring Canadian authors and their Canadian-published books.

50 new independent bookstores in 5 years

According to knowledgeable bookstore operators, any Canadian community of 60,000 or more can sustain a successful independent bookstore. There are between 50 and 100 separate communities with this population (depending on the criteria used to measure a potential bookstore's primary market area) and many neighbourhoods of this size in larger cities that are currently without independent bookstores.

The accreditation initiative we are proposing (see below) would strengthen the economic viability of start-up independent bookstores and, over the medium term, have an effect similar to that experienced in Quebec, where most small towns are capable of supporting an independent bookstore.

As noted earlier, independent bookselling is enjoying greater stability and even a revival in many communities. We believe that the book industry as a whole stands to benefit substantially by supporting this trend and by accelerating it. We recommend that the industry set a goal of seeing 50 new independent bookstores established within the next five years. To achieve this we propose:

2. Collaboration between Bookmanager and BookNet to promote independent bookstore start-ups and to provide support in the form of promotion of the

concept, new bookstore owner-manager training, and the development of measures that publishers can implement to assist with new stores' opening inventory financing.

Bookmanager's experienced management could be a key resource in developing initiatives that draw the attention of potential entrepreneurs to the opportunities in book retailing. Its commitment to the health of the industry is well established: In the absence of a national association of booksellers in English Canada, Bookmanager has stepped into the void through its annual meeting of client bookstore users and the professional development it offers those users.

Another bookstore software supplier, Wordstock, also has a presence in the Canadian marketplace. Independent start-ups would benefit from exposure to all software options, and it would be important for the credibility of the initiative to welcome engagement from Wordstock or other credible vendors alongside Bookmanager. However, given the dominance of Bookmanager in the Canadian marketplace, its reliance on Canada as the primary market it serves, and the support its management already offers to start-ups, we see it as a valuable partner and important player in this initiative.

The other essential resource is BookNet and the network it operates, which allows the smallest and newest bookstore to use efficient electronic systems for their business transactions with publishers and distributors at a very affordable cost. BookNet's experience, staffing, and management would allow it to collaborate with Bookmanager on a comprehensive plan to support a round of independent bookstore start-ups.

Public libraries and independent bookstores

Elsewhere in this report we propose measures that would increase public library spending on Canadian books and suggest that this component of public library collections be purchased through independent bookstores. Such an initiative would channel a significant amount of new purchasing of Canadian-authored books through participating bookstores, improving the viability of the stores and leading to significant increases in the display and shelf space devoted to Canadian-authored titles.

To support independent bookstore start-ups, we propose that they have access to this institutional buying as soon as they open their doors, with no eligibility delay. Channelling library purchases of Canadian books through bookstores would create a base demand for these books in virtually every Canadian community. Independent bookstore start-ups

would derive greater confidence in the sales volume needed to launch their businesses, and libraries would benefit from support for a local business that is likely to be appreciated by their patrons. We propose:

3. Immediate access for qualifying new independent bookstores to public library purchasing of Canadian-authored and Canadian-published books.

Real estate and cultural spaces

Canadian cities have many ways of supporting local cultural facilities operated by non-profits, including operating grants or some measure of property tax reductions. In Vancouver and Toronto, cities that are important for their numbers of book readers, high rents for retail space have led to discussions about what measures might be appropriate to ensure retail diversity and to sustain independent retailers of all kinds.

France considers high real estate costs to be a sufficient threat to intellectual and cultural life to warrant state subsidies for the occupancy costs of independent bookstores in Paris.⁴ One real estate development firm in Vancouver regards independent retail important enough to the success of its new neighbourhood that it is offering space to store operators at below-market rents.⁵

Independent bookstores provide their communities with valuable cultural space where the public can discover books and participate in highly stimulating events – readings, book launches, debates, panel discussions, and more. Canadian municipalities could foster independent bookstore start-ups by recognizing them as eligible for cultural support in the same way that they currently support theatre companies and other local arts enterprises. We call on municipalities and/or provinces to help launch new independent stores and sustain existing stores threatened by unaffordable real estate costs:

4. Independent bookstores should be eligible for municipal support as cultural spaces in the form of subsidies or property tax rebates when such measures are required to allow them to operate as viable business operations.

Accredited bookstores

The measures we have proposed so far would reinforce the positive change in outlook for sustainable independent booksellers today and encourage new start-ups in the future. These initiatives will generate a measurable increase in awareness and reading of Canadian books and give them a stronger presence in participating stores. These measures could all be implemented quickly and would be administratively simple to carry out.

In the broader context of the book trade in Canada, however, there is a need for measures that will affect more of the key channels of awareness and access to books. Independent bookstores offer an opportunity to achieve even larger goals with respect to cultural policy.

Adopting a version of the accredited bookstore system, now in place in Quebec, involves changes in the current practices and policies of school librarians and teachers, public librarians, and booksellers. It is an approach that combines the objective of sustaining and enlarging the independent bookstore sector with the benefit of giving teachers and librarians hands-on experience with quality Canadian books and enlarging the presence of Canadian books in libraries. It also has major benefits for the reading public, since it leads to a wider range and greater availability of Canadian books in bookstores. The browsing and discovery of Canadian books is enhanced, and the result is more buying and reading of appealing and attractive Canadian titles.

The Quebec accreditation model

Quebec's accreditation system for bookstores has several interrelated elements:

- **Canadian book stocking and display:** To qualify for accreditation, a bookstore commits to holding, displaying, and offering for sale a designated number of Canadian-authored books and a designated share of the store's total shelf space. Title holdings are tracked and reported.
- **Adequate display time:** The bookstore commits to maintaining new titles that it purchases in stock for a specific period of time – three months – allowing time for awareness of new titles to build.
- **Public institution support:** Public institutions, including public libraries and schools, are required to spend their book budgets in accredited bookstores. Since price competition is largely ruled out, this generates a reliable flow of business from publicly funded

institutions to supplement purchases by consumers. This institutional purchasing helps sustain bookstores in communities where consumer purchases alone may be inadequate to support a bookstore.

- **Controls on discounting:** Accredited bookstores are invoiced at a standard publisher discount and must sell to institutions like schools and libraries at no more than a specified standard discount.

The accreditation system has other components, but these are the key elements in a policy that helps support some 250 mostly independent bookstores throughout Quebec, which offer a wide range of titles that are stocked and displayed, including substantial numbers of children's and teen titles.

Drawing on and adapting the Quebec model, we recommend that the accreditation approach to bookstores be extended to all Canadian provinces:

5. Develop and implement programs in all Canadian provinces whereby accredited bookstores become the source for publicly funded purchases of Canadian-authored books by schools and public libraries in exchange for stocking and displaying a wide range of Canadian-authored titles.

The incentive we are suggesting for libraries in this report involves senior governments matching current public library system spending on Canadian-authored books to achieve an immediate increase in the acquisition of these new books by public library branches.

This call to action is based on Quebec's success in maintaining a healthy independent bookstore sector in cities and towns throughout the province. It also uses the digital technologies already in place in independent bookstores and in the book supply chain. An independent bookstore can readily track the Canadian-authored titles in its inventory using data available in the BookNet metadata feed; reporting on this inventory is easily achieved using existing inventory management software.

Implementing an accredited bookstore approach is a measure for provincial governments, which have responsibilities in all the relevant sectors. In some cases this would flow naturally from policies already in place regarding cultural development. As a significant change to the current practices surrounding library collection development and purchasing, it

would require the engagement of several sectors of the book world simultaneously. An innovation of this kind will come about only if the case for its benefits is strongly advanced and if it attracts support not only from book industry participants but from the wider public. Quebec's experience with bookstore accreditation is that implementation takes time and requires the development of expertise in the responsible government departments or agencies. We see accreditation as a medium-term proposal: The organizations involved will need to explore the impacts and the benefits and work collaboratively on the specifics of implementation.

Ultimately the benefits of accreditation to independent bookstores can be expected to give them the resources to undertake Canadian-focused events and promotion without additional financial support from government. Accredited stores would have substantially greater display and shelf space featuring Canadian books, and their event and promotion activity would shift toward creating awareness of those books and authors among their customers.

In conclusion: independent bookstores as champions of Canadian authors and books

Many independent bookstores in Canada are flourishing today, not struggling – that fact emerged clearly from our research and our discussions. Existing stores have proven their value as more than just another retail establishment. They are cultural spaces, and they are widely acknowledged for their community-building contributions to the towns and cities fortunate enough to have them.

Measures to support existing independents such as we are proposing would have immediate, visible results in every community where there was a participating store: more book- and author-related public events, increased digital communication and exposure, and greater awareness and readership of Canadian-authored and Canadian-published works.

Measures to encourage the establishment of new stores will be popular and welcomed. New stores would increase the independent market share, contribute to the ongoing health of the Canadian book industry, and likewise increase the number of Canadian-authored and Canadian-published books being sold and read.

There is an opportunity to tie the resurgence of the independent bookstore sector with important existing public policy objectives intended to foster the creation, publishing, and reading of Canadian books. Our proposals are intended to solidify that tie at a relatively modest cost and with the many spinoff benefits that independent bookstores create in their communities.

School Classrooms and Libraries

Introduction

Canadian authors and illustrators are creating more high-quality books for young readers than ever before, and the number published every year continues to grow. In 2017, BookNet reported some 750 new Canadian-authored trade books for young readers published in English, of which about 500 were published by independent Canadian publishers and 250 by multinational subsidiaries.

The excellence of Canadian children’s literature is recognized internationally and at home, where high-profile awards programs sponsored by governments, book industry groups, library organizations, and corporate sponsors have multiplied over the past 20 years.

Children’s book reviewing is rare in mainstream media, such as daily newspapers, but several specialist publications from the US, UK, and Canada give educators and librarians access to authoritative and independent evaluation of new titles. Proof of the abundance of valuable and engaging Canadian-authored children’s and teen titles is found in the reviews and articles in these professional resources. The Canadian Children’s Book Centre publishes reviews in its quarterly magazine, *Canadian Children’s Book News*, and twice yearly releases a guide to the most outstanding new works, *Best Books for Kids & Teens*. In recent years, their reviewers have identified and recommended 1,350 Canadian-authored titles to public and school librarians. (The complete list is available, in searchable format, on the CCBC website.) *CM: Canadian Review of Materials*, an online publication, reviews and evaluates virtually every new Canadian-authored book it receives and tags several hundred new titles annually as “recommended” or “highly recommended” for library collections. The National Reading Campaign commissions and publishes weekly online reviews of Canadian children’s titles, while *Resource Links*, a print-based independent journal published five times a year until 2018, evaluated more than 100 English- and French-language children’s and teen titles annually.

The question is, do young Canadian readers have access to this wealth of Canadian-authored work in their classroom and school library? We were unable to find a definitive answer. The only data available is impressionistic. There are about 10,000 English-language public schools in Canada, including more than 1,000 high schools. But industry sales figures indicate that only a few hundred copies of the average new book reach those 10,000 schools' classrooms or library collections. To understand why this gap exists between abundant supply and weak demand, it's necessary to examine the awareness and distribution channels that deliver books from writers and publishers to classrooms and school libraries.

Books@School

The environment for books in Canadian school classrooms and libraries today is one of contention, competition, and disruption. Discussions with think tank participants who have extensive experience in school library collections and acquisitions, complemented by the knowledge of publishers long in the market, yielded a set of common observations about the dramatic changes that have occurred in the last two decades. Among them:

- Most schools still have physical spaces that were once described as libraries but which are now identified as resource centres, learning centres, or learning commons. Books are usually present alongside other learning materials, particularly digital devices such as tablets and computers and digital content resources. A space dedicated solely to books, to encourage the use and reading of books, is largely a thing of the past.
- The position of the school librarian, traditionally held by a professionally trained teacher-librarian, no longer exists in most elementary schools nor in many high schools. When a school's library or resource centre is staffed, it is usually by a library technician whose education and training does not necessarily include specific book selection knowledge or skills. Library technicians may not have the background to be able to evaluate and assess how books can be used to support and enhance students' understanding of the curriculum. Only a minority of schools, mostly at higher grade levels, has a professional teacher-librarian on staff, and the position is often part-time. Library technician positions are likewise usually part-time.
- In most provinces and school boards, funds for acquiring new learning resources, including books, come out of school-level budgets with no separate line item designated for them. The number and frequency of new books arriving in school classrooms and libraries depend on decisions made by principals who are weighing competing priorities and needs. While core textbook purchases are often funded from a dedicated budget al-

location, other learning resources are unlikely to be given the same status. Most provinces and boards allocate no specific budget amounts to books.

- The overwhelming presence of digital resources, particularly digital information resources, creates competition between digital and traditional print materials for teaching and learning purposes. There is a strong tendency by educators (increasingly a cohort of teachers and principals who has more personal and professional acquaintance with digital resources than with print) to favour digital and to regard print as less appealing, less relevant, less current, and more expensive.
- There are few policy guidelines in place to determine what digital resources will be used in schools, creating an environment where a largely unmeasured and unevaluated range of digital products is employed for learning purposes and most decisions are made by individual teachers.
- With the exception of Quebec, there are few policies in place at the provincial level that specifically call for the use of Canadian-authored materials in classroom or library collections or that effectively mandate a preference, priority, or requirement for student access to Canadian materials. Where such policies are articulated, they are not effectively connected to practice.
- School libraries and resource centres use software packages to manage their collections of materials and the lending of books. The dominant supplier of software in Canadian school libraries is Follett, a US library wholesaler and software supplier. Follett's software does not allow for the separate identification of Canadian-authored books. A second important software supplier, though Canadian-based, is focused on sales into the US. Here, too, the software does not currently allow for the recognition of Canadian books.

Distribution and supply chains to schools

The selection and sourcing processes for classroom and library collections have changed greatly in recent years. Purchases are largely made at the school level by the person with the library or resource centre responsibility and with funds provided by the school principal. But selection decision-making practices vary from province to province, as do spending levels.

Most books acquired as resources for Canadian school classrooms and libraries – as distinct from textbooks, which are purchased through other channels – are purchased from school and library wholesalers. Online book vendors, including Amazon, are significant suppliers, whereas in most communities local bookstores play a small or non-existent role.

School wholesalers rely on enterprise software to manage both book-buying from publishers and sales to school customers. These software systems carry information about available books; receive, process, and organize the shipping of orders; and provide administrative support for their businesses. In some cases this software is structured to identify books that are Canadian-authored, but there is no built-in priority or preference for the display, promotion, or sale of Canadian materials. Usually, however, this functionality is missing from the software's design.

Book fairs

Alongside wholesale and retail book channels serving schools, there is a second source of books that operates in schools across the country: the school book fair. Book fairs are pop-up bookstores, operated inside schools, that sell books to students and their parents. They generate revenues for hosting schools – effectively, rent revenue for use of school property and access to buyers – which is most often paid in kind in the form of books placed in classroom and library collections. The dominant operator of school book fairs is Scholastic, a multinational with a substantial branch plant operation in Canada. Independent bookstores and some wholesalers are also active in the school book fair channel, but they represent a very small share of the total book fair market. There are no available statistics on the full size of this market, nor data on the nature of the content it offers.

Take-away displays

In southern and eastern Ontario, home to about half the English-language school population in Canada, the most important opportunity for book selection is the “take-away display.” School librarians and other educators know these events by different names in different locations, but publishers and wholesalers use the generic term “take-away” for all. A take-away display is a pop-up mini mall, complete with shopping carts, that offers only books for sale to school librarians and library techs who attend during a workday. Individual “stores” are operated by different vendors, mostly library wholesalers. Attending teacher-librarians and library techs browse long tables of books, stacked in piles, just like the book tables at a Costco store.

The selection of books offered is decided by the individual vendor. At some take-aways there may be a few ground rules; for instance, the books must have been published within the last three years. Buyers make their choices and then head to that store's cash desk for checkout. They can take their purchases with them – hence the term for this merchandis-

ing method – or have them shipped by the wholesaler to their schools or to a central facility for processing and readying for school use.

The structure of the take-away display combines virtually spontaneous book selection with an immediate purchase. The convenience carries a cost, however:

- Shopping librarians often come with specific needs in mind (“we should have more fiction by Indigenous authors for teen readers”) but rarely with lists of specific titles.
- There is no easy way to find a specific book in the take-away mall, since each vendor organizes their displays in their own way.
- Buyers have no access to independent professional evaluation of the books they are considering while they are making their purchase decisions. The tools traditionally used in guiding their choices, such as awards and reviews, have little or no impact in this setting.
- Buyers are choosing only from the titles selected by the wholesalers at the display, not from a comprehensive range of recently published works.
- Displayed books are not normally tagged or identified to indicate which are by Canadian authors or reflect Canadian content.
- Many, sometimes most, of the displayed books carry no printed price, so shopping librarians make their purchase decisions without reference to individual title price. They learn only the total cost of a shopping basket of titles at the checkout.

This book selection and purchasing mechanism has a strong determining effect on the access students have to Canadian books in most Ontario school classrooms and library collections. Less evident are the business imperatives for the wholesalers that determine what titles are offered for consideration and purchase even before the shopping librarians arrive.

Of the thousands of new titles, Canadian and foreign, to choose from, wholesale vendors can select only a few hundred to stock and display at a take-away event. They need to weigh the appeal of each title and the margin they can earn by selling that title. Margin considerations generally favour foreign books over Canadian: foreign publishers and their Canadian distributors or Canadian branch plants can and do offer wholesale vendors high discounts on list prices that Canadian independent publishers do not match. The margins to be made on the sale of extra copies in a foreign market – in this case the Canadian market – are far greater than the margins on titles where all the start-up expenses of the book must be recouped from Canadian sales only. And so, any initiative by Canadian publishers to match discounts can always be trumped by the foreign publisher and its Canadian distributor.

Another advantage foreign books have over Canadian titles in this environment is that American books display a preprinted Canadian price much less frequently than Canadian books – a difference in publishing practices between the two countries. When a US price is preprinted, there is often no accompanying preprinted Canadian dollar price. This allows the US publisher, the Canadian distributor, or the Canadian wholesaler to decide on the Canadian price, facilitating an extra margin on the book by adjusting the exchange rate. Wholesalers often offer their customers an across-the-board discount on the “list price” of all the books they sell, but the softness of the list price of many imported books can result in the margin on the foreign title being greater than on a Canadian title. Some wholesalers offer varying discounts depending on the terms they receive from their Canadian supplier, and this can allow for better margins on the imported books than on the Canadian titles.

Think tank participants noted that at one time, sales personnel at the major book wholesalers would insist on displaying, recommending, and selling Canadian-authored books to their customers. It was a way of maintaining their professional reputations for knowledgeable service. But the book wholesale business in Canada has become more challenging, thanks to lower institutional spending and greater competition. Many sizable wholesalers have gone out of business or into bankruptcy, and the promotion of Canadian books is less evident in the market today. When library and school customers give more weight to the discounts offered than to the content available, then business logic dictates that wholesalers will go first to foreign-authored books from multinational publishers. The more competitive the market in which the wholesaler operates, the more likely it is that individual firms will take this approach to stay in business.

Outside of southern and eastern Ontario, new materials for classrooms and libraries continue to be purchased from library wholesalers and, to a lesser extent, from online book vendors and bookstores. This traditional approach to book selection and purchase leaves more room for professional book reviews, recommended reading lists, trade show displays, awards and prizes, and other sources of information to inform purchase decisions.

Nevertheless, the same business imperatives pushing wholesalers to prioritize imported books over Canadian titles at take-away displays in Ontario also apply to awareness and distribution channels nationally. So, too, do the characteristics of the digital infrastructure used by wholesalers to offer information to librarians about new books and the software packages used by libraries themselves, including such recommendation engines as digital catalogues.

We believe that provinces and school boards serviced by the traditional methods of library wholesalers, online vendors, and bookstores are choosing a somewhat higher percentage of Canadian-authored books for school classroom and library use. However, the bias in the channel toward non-Canadian materials is pushing that percentage down. The overall result is that only a fraction of the Canadian-authored and Canadian-published books for young readers are available to students in Canadian schools.

Innovations and interventions for Canadian books

There have been significant and successful initiatives to increase the presence of Canadian books in schools and libraries. One example is the TD Bank's Grade One Giveaway program, which puts a free copy of a recently published Canadian-authored book in English and French into the hands of every grade 1 student in Canada. This means the purchase of 550,000 printed copies of one title selected annually, which are then distributed to all children in participating school boards. The project fosters leisure reading of books at an early age, encourages both parents and children to read generally, and gives millions of Canadians an example of an engaging, successful, high-quality Canadian-authored book.

A second and extremely effective undertaking is Ontario's Forest of Trees awards program and, specifically, the seven tree awards (the Blue Spruce Award, the Silver Birch Award, etc.) for children's books in grade-related and genre categories. The Ontario Library Association initiated this type of award, and there are now a diversity of similar tree awards across the country. They are designed to generate reading for pleasure by young readers of a selected short list of new and recent Canadian-authored books chosen for their quality and appeal. By incorporating a competition feature – kids vote for their favourite books – the Tree awards have helped develop a sense of engagement and connection with authors and their works that is unprecedented.

Participation by schools and public libraries has been built year over year, bringing substantial exposure for new and recent Canadian books to hundreds of thousands of young readers, leading to an increase in the number of selections for different age groups and interests. This program puts the selected titles into a high percentage of Canadian classrooms, school libraries, and public libraries – an example of the effective use of existing awareness and distribution channels to give visibility and priority to Canadian content. Tree awards have at the same time greatly benefited the authors and publishers of the selected titles, yielding incremental sales of thousands of copies annually.

A third category of innovative initiatives is built around community efforts to ensure that outstanding new books are made available in local school libraries and classrooms. Edmonton has a long-established program that achieves this result. Surrey also has an initiative to provide copies of prize-winning children's books (from many countries, not just Canada) to readers across their system. These programs focus on a few "winner" titles, but they demonstrate that current awareness and distribution channels could be adapted to increase the reading of quality Canadian books.

Not all interventions have been successful. A government scheme worthy of brief note took place in Ontario in the early 2000s, when public concern over deteriorating school libraries led the province to offer dedicated funding to school boards for print-material purchases for school and classroom libraries. There was no requirement that the funds be spent on Canadian-authored books, and in spite of the program's objective, it emerged after the fact that the reporting guidelines were sufficiently vague to allow spending on materials other than books. The experience demonstrated that good intentions are only a start for any innovation intended to increase the availability and reading of Canadian-authored books in schools. Every detail has to be carefully considered to ensure it is contributing to the stated goal.

Another failed undertaking was an attempt led by BC publisher Bob Tyrrell of Orca Books to establish a school book club offering Canadian-authored books from a range of publishers in a book fair structure. This initiative was perceived as a competitive challenge by Scholastic, which used various measures to discourage schools from using Canadian First book club services. After several years' effort, the experiment was deemed a failure by its investors and shut down.

The consequences of lack of awareness and access to Canadian books

There are identity and cultural consequences when young people are repeatedly exposed to stories and settings that are foreign to their own experience. Their self-awareness as Newfoundlanders or Manitobans or Calgarians or Hamiltonians is stunted when the characters they are reading about communicate the value of being a New Yorker or a Texan or a proud American. The opportunity to understand the dynamics of their own history and culture is missed while they learn about southern US culture and racism in Harper Lee's *To Kill a Mockingbird* – a perennial long-form fiction choice of Canadian teachers – but never

learn about Canadian-style racism in Jody Warner's *Viola Desmond Won't Be Budged* or Beatrice Mosionier's *In Search of April Raintree*. To supplement a high school course on 20th-century history, their teacher may well offer them *The Causes of the Vietnam War*, a US-authored publication that understandably presents a different version of this conflict than would a Canadian author writing for a Canadian audience.

These examples only begin to touch on the significant, long-term educational and social implications for our young people if they do not have access to Canadian books in their classrooms and school libraries. If there are no policies to confirm the importance of offering students access to Canadian works, nor any accompanying measures to make this desirable and doable for teachers, then a cumulative absence of Canadian literature and culture in schools comes about without anyone seeking or intending to make it happen.

Value and deliver

Most Canadians and most Canadian educators believe in the value and importance of Canadian cultural work. The days when American and British writers and their books were regarded as superior to our own are long gone. Indeed, Canadian school librarians once believed that they *were* providing substantial Canadian content in their collections for young people. This was evident in a 2006 survey, the only survey on this issue we were able to locate, in which school librarians reported that a respectable 34 per cent of their collections were Canadian. Of these school librarians, 70 per cent selected the option offered in the survey setting 10 to 40 per cent as the share of Canadian materials in their collections. They would probably have believed that a similar percentage of the reading and use of their collections was of Canadian works.⁶

Our assessment is that these perceptions are no longer accurate, even if they were 12 or 15 years ago. If wholesalers and other vendors reported the percentage of their school sales represented by new Canadian-authored books (currently they do not), our estimate is that the number would be considerably less than the numbers reported in 2006. And if the purchases of Tree award titles were taken out of the calculation, we believe the share of Canadian books in school libraries would be expressed by a single digit. As noted earlier, industry sales data shows that many new and recent Canadian-authored titles, independently recommended by librarian reviewers for the collections of schools and public libraries, are selling only a few hundred copies in their lifetime in Canada.

In such a complex situation, where policies and practices vary from one school to another, one board to another, and one province to another, it is daunting to identify universal measures that would reverse this downward trend and make a significant positive impact on awareness and reading of Canadian-authored books. Nevertheless, we concluded that there is an opportunity to build on the uncontested success of a number of initiatives already in place. There are interventions that could, over a short period of time, fuel a dramatic re-engagement of young Canadians with their literature.

An essential first step is the establishment of a policy framework to underpin and nurture a set of initiatives. We call for:

6. The creation of policies by provinces and school boards to assert the educational and cultural importance of young Canadians' ample access to the work of Canadian authors and to Canadian books expressing Canadian experience, values, attitudes, and culture in all formats, subjects, and age levels in school classrooms and libraries.

This call to action will seem redundant to some, since there are policy goals and objectives in many board and provincial documents that express this sentiment. We include it here because when a policy goal is not explicit, but simply assumed as a shared value, there is no link to actions to implement it nor markers to measure its achievement.

Tree awards

Our next proposal reflects our view that the best route to change is to build on precedents that have successfully increased awareness and readership of Canadian-authored books. The Tree awards are such a foundation. The opportunity here is to expand the Tree awards from the current short lists of titles to a much broader range of works selected every year. We recommend that:

7. Tree awards expand the range of children's and teen Tree award nominees to encompass a "long list" of as many books as their evaluation teams find suitable for recommendation as appropriate for classrooms and school libraries, similar to the long lists regularly developed by *CM: Canadian Review of Materials* reviewers and the Canadian Children's Book Centre's Best Book evaluators. This much-enlarged selection would create an annual list of several hundred new Canadian-authored books, all with the authoritative endorsement of the Tree awards' quality standards, for every age group of children and teens.

Schools and boards have dedicated funds to finance Tree award book purchases in the past. Lack of funds at the school level will be the largest single limitation on participation in this expanded version. However, the well-known popularity and proven success of the Tree awards, and their contribution to literacy and cultural awareness, is such that this undertaking should be fully funded by provincial departments and ministries of education and the federal government, in its funding role for education of Indigenous peoples and the children of the Canadian military. Funding should permit every school wishing to participate to do so. The cost of broadening the program would be modest for the substantial benefits it will generate by giving students access to high-quality Canadian children's and teen books and attracting public attention to important cultural and educational issues. The call to action:

8. Provincial governments and the federal government should implement their overall educational and cultural goals with respect to literacy, reading, and providing a grounding in Canadian culture by fully funding the annual purchase by public schools of all Tree award titles in quantities adequate for classroom and school use and by permitting maximum participation in the Tree awards programs by all students, regardless of the access to resources at the schools or boards.

In Quebec, we've seen the successful operation of an accredited bookstore system that gives schools ready access to a broad inventory of Canadian-authored books, available to browse and discover year round. That system does much more for the community and for readers than just facilitate the placement of Canadian-authored books in school classrooms and libraries, but that benefit is one of its most far-reaching and influential.

Tree award book purchases by schools are currently divided between bookstores and school library wholesalers, with the majority of purchasing done through wholesalers. We recognize the importance of this revenue for the major participating wholesalers. We recognize, too, that this creates an incentive for wholesalers to promote Tree award participation among schools. At the same time, the substantial expansion of the Tree awards we are proposing would significantly increase the sales volume of these purchases. Channelling this spending through accredited independent bookstores would strengthen those stores in communities across the country. We suggest a transition period in this area, during which existing wholesalers might expand by opening independent bookstore operations, not unlike the expansion of some independent bookstores into book wholesaling to serve the school market. This would contribute to the goal of growing the independent bookstore sector while respecting the business interests of the wholesalers affected. This approach leads to several recommendations:

9. Provincial Tree award book purchase funds should be tied to accredited bookstores, whose accreditation would require fully stocking and displaying Tree award titles plus a wide selection of Canadian-authored titles for public and professional buyers.
10. Publishers submitting titles for Tree award consideration would continue the existing practice of selling the books on specified discount terms and contributing a percentage of these sales to Tree award administrative organizations across the country to cover the costs of running these award programs.
11. In provinces where the majority of current Tree award title purchases are channelled through library wholesalers, a three-year transition to the accredited bookstore model should be allowed, which would give affected wholesalers time to adapt by integrating an accredited bookstore presence into their operation, just as many successful independent bookstores have developed wholesale operations that sell to school and public libraries.

School book fairs

A strengthened network of accredited independent bookstores could offer an alternative or supplement to existing Scholastic school book fairs. Although Scholastic has in the past used a combination of carrots and sticks to maintain their market position, the educational and cultural benefits of book fairs that present students with a more comprehensive selection of Canadian-authored books should lead principals, school boards, and departments of education to consider interventions to open up this market. We offer the following calls to action:

12. Provincial governments should regulate school book fairs and require all school book club retailers to include a wide range of affordable Canadian-authored titles, including a fair range of titles from independent publishers, in all school book fairs.
13. School book fair regulations should give priority access to local accredited bookstores with a presence in their communities on terms at least as favourable as those accorded to their current book fair supplier.

School library software and digital infrastructure

Because the software used by school libraries, school boards, and book wholesalers is central to providing information to educators and young people using school resources, developing next-generation versions of this software that allow for full data to distinguish Canadian-authored titles and independently published titles is critical to successful policy implementation. This enhancement would prioritize the display and recommendation of Canadian resources in print and digital formats. We call for the following action in this area:

14. Funding for a major portion of the costs of software enhancements and upgrades, to allow for the capture and display of metadata fields reflecting Canadian authorship and Canadian content, and for recommendation engines that give priority and preference to Canadian content, fairly balanced between books originated by multinationals and independent publishers.

Classroom resources in print and digital

Though an expanded Tree awards program would greatly increase awareness and consumption of new Canadian-authored books for leisure and classroom reading, there is a broader need for provisions that will ensure the ongoing acquisition of these materials, both print and digital. Given that the Canadian market will always be open to resources developed internationally, particularly from the US, and given that such imported products will always earn bigger margins from whatever sales are found in Canada, market forces will continue to reinforce a bias against Canadian materials and toward imports. The only counterweight to this perennial market condition is public policy that is well designed and carefully structured. This leads to a call for ongoing policy and budgetary interventions:

15. Provincial governments should ensure that policies designed to encourage the use of Canadian-authored materials are accompanied by funding specifically dedicated to purchasing these Canadian materials.

Digital resources pose a clear challenge in Canadian education. Educators are accustomed to free access to these resources on the internet. The overwhelming share of free materials are developed for US use and reflect American values, priorities, and realities. Quality Canadian digital resources for classrooms are a viable alternative only if they, too, are free

or if educators have adequate funds to purchase them. This issue was recognized in a 2016 research report commissioned by the Ontario Media Development Corporation. This led to the establishment of a program aimed at increasing awareness and use of Canadian materials in Ontario schools. Modestly funded at \$500,000 over three years, the program is unusual in that branch plants of multinational publishing firms were eligible for support along with independent Canadian publishers. Our calls to action in this area are for a scaled-up initiative by all provinces:

16. To foster the creation of materials, including digital materials, reflecting Canadian experience, values, attitudes, and culture, provincial governments should ensure that their funding support allows Canadian materials to sell at prices equivalent to similar materials created elsewhere and that the funding for the purchase of these materials is adequate to guarantee their acquisition and use as called for by their educational and cultural objectives and policies.

Current data on the presence of Canadian-authored and published materials in Canadian schools is badly needed. We applaud the moves now underway to gather information on sales to schools by library wholesalers, for example, and we urge an evaluation of the Canadian component of school classroom and library collections and purchases. Our call to action is:

17. Provincial education ministries and departments should gather data on student access to and use of Canadian-authored print and digital materials, enabling the evaluation of the policies and programs aimed at achieving substantial increases in access and use.

In conclusion

Our findings regarding the declining presence of Canadian books in schools today surprised all of us. We are aware of the commitment of Canadian educators to the importance of Canadian cultural work and their high regard for the quality and range of Canadian books. The situation we document in school library resource centres and in classrooms is not a product of policy. It arises as the unintended consequence of a variety of circumstances, including the transition to digital management of library resources and changes in

how new materials are purchased, where the implications for Canadian content are by no means obvious. It also arises from the economic realities of book publishing, distribution, and sales.

What is evident is that if we want young people to encounter Canada, Canadians, and Canadian creative work in their education, we have to intervene to ensure it happens.

Public Libraries

Libraries are much-valued public institutions in Canadian life. They attract the highest user participation of any cultural organization, and they are second only to bookstores in connecting readers with books. Unlike book retailers, who have an essential, often overriding commercial mission, libraries are driven by a public service mission. They create awareness and provide access to books, including Canadian-authored books, in virtually every community across the country.

The multiple roles of public libraries

Making books available to users and lending them for free is what most of us would consider the primary role of public libraries, and this is indeed their single largest activity. The country's 26 largest public library systems served 4.9 million active users in 2015; they counted 73 million visits and circulated 127 million items.⁷ The average public library user borrowed about 25 items, mostly books, during that year.

Public libraries fulfill several other important functions. The library is a source of reference information and material in both print and digital form, which can be used in the library itself or made available for borrowing or digital use at home. It is a community cultural and meeting centre, offering free or low-cost facilities for myriad activities that bring people together. The library is often an adult education resource as well, mixing access to books with a variety of enriching programs.

The environment offered by public library branch buildings invites exploration and discovery, whether browsing shelves and displays, reading informally, or downloading digital content. Patrons of all ages can feel welcome, aided by helpful staff, comfortable furnishings, and readily available tools. In all their roles, Canadian public libraries have embraced the digital world, providing users with internet access, free access to digital databases, and lending books in e-book and audio formats.

Public libraries represent a substantial ongoing annual investment of public funds in books and other materials. The 2015 statistics for those 26 largest public library systems show total print material expenditures accounting for \$66 million, e-books for \$13 million, periodicals for \$9 million, audio/video materials for \$29 million, and electronic/digital materials for \$26 million. These library systems reported total spending of \$640 million. This far outstrips all other spending related to writing, books, and leisure reading by public agencies.

There appears to be no recent authoritative research on the current operations and practices of public library systems in Canada that addresses collections policies and practices and focuses on the place of Canadian-authored print and e-book titles in libraries. What follows is an overview based on the research we were able to locate and the input of think tank participants. The description we offer does not apply in full to every public library system across Canada; there are innumerable variations in policies and practices. What follows represents our best efforts to present a description of policies, practices, and outcomes that are widely shared, as well as an initial analysis of the impact on awareness and readership of Canadian-authored books today.

Public library goals

As municipal (and sometimes provincial) institutions, public libraries are established and operate under provincial legislation that provides the framework for their activities. The bulk of their funding usually comes from the local municipality, and their governance is the responsibility of the municipality. Most library systems have a measure of autonomy from city politics and civic administrations, with independent citizens appointed as board members (often joined by local councillors), but they are ultimately dependent on their city or town councils.

The overall goals of public libraries are set by each system, within the parameters of governing provincial legislation. The primary goal, of course, is to provide library services to the citizens they serve. Their success in doing so is usually measured by circulation statistics in conjunction with other measures, such as the number of visits to libraries, the uses made of library-provided databases, attendance at events held at libraries, and the count of reference questions received.

Public library systems report their results to their board and city council, and their numbers become part of a larger statistical record compiled in annual Canadian Urban

Libraries Councils (CULC) reports. Performance is assessed by trends within a single system and by comparisons of per capita or per user activity levels and expenses with other systems.

Libraries also track spending on all materials and on specific categories, such as mass-market paperbacks and children's books. They count the number of new titles and items added to their collections annually.

Professional librarians and library managers view Canadian-authored books as valuable, important, and interesting to their users. They typically regard Canadian works and books by local and provincial or regional authors as having special cultural significance. Specific policies are often set out regarding local/provincial/regional books, authors, Indigenous authors and books addressing reconciliation themes, and other specific priorities. Overall policies regarding Canadian-authored books taken as a whole appear to be far less common.⁸ A commitment to generating awareness and offering access to Canadian-authored books is often considered to be embedded in day-to-day decisions and practice. However, it is not often formally articulated or crystallized into explicit system goals, and it is not built into operational infrastructure or subject to measurement and evaluation. Few public library systems track metrics relating to their performance with Canadian-authored books.

Major public library systems often have policies or practices to collect a high percentage of the Canadian-authored, professionally published books they are aware of. This means having one copy in the system and having information about that book in the system's catalogue. However, ensuring that titles are in the library's collection is not the same as generating awareness and reading of that title by placing copies in a significant number of branch locations, where library users will encounter them through browsing and display. Only a few library systems currently track the overall presence of Canadian books in their collections or the share Canadian-authored books represent in circulation numbers or the activities of the library that promote Canadian books. However, an ongoing project by BookNet Canada working with CULC will soon make much of that data readily available to public library managers.

With the greatest responsibility of any public institution to provide Canadians unfettered access to books, there is an opportunity for public libraries to formalize the role they play in the awareness and reading of Canadian books.

Leisure reading and public libraries

Given the level of engagement of Canadians with their local public libraries, it is no surprise that books borrowed from libraries account for a substantial share of all the leisure reading. A 2017 BookNet study found that 46 per cent of all book readers in English Canada had checked out one or more library books (in print or digital) in the previous 12 months. An Atlantic readers' spring 2017 study reported that 65 per cent of book readers in the region said they had visited a public library in the past year (though the study did not go on to ask whether they borrowed a book on that visit). Earlier Canadian studies surveying book readers about library visits have produced similar significant numbers. A small sample survey of 400 book readers across English Canada in the winter of 2018 found that 72 per cent reported borrowing one or more books from their public library in the past six months.

Book readers report that retail stores are the largest source of the books people read (62 per cent in a 2005 Department of Canadian Heritage study), but public libraries were second at 32 per cent and were more important as a source than books borrowed from other people (19 per cent). These statistics show how people rate these sources but do not necessarily reflect what share of total reading is accounted for by each source.

We have not located any recent research on the share of total book reading represented by books borrowed from public libraries. In the baseline 1978 reader survey, books from public libraries accounted for only 9 per cent of books read, compared to 29 per cent from bookstores and 21 per cent borrowed from other people.⁹ Today the share for books borrowed from public libraries would undoubtedly be higher, considering that the large urban library systems (which represent the majority of public library activity, but by no means all) report the above-noted 127 million items borrowed, of which more than half are certainly books. BookNet's 2017 reader survey found that 46 per cent of all book readers are public library users. So even without recent statistics on what percentage of total books read come from public libraries, the power and importance of the public library as a distribution channel is evident.

Awareness of books and public libraries

While libraries are a source of books to borrow and read, they perform a second, vital function: They create awareness of and provide information about books in general. Library users discover books they don't know about by encountering them in libraries –

in displays and on shelves. Books effectively market themselves, with their covers and jackets carrying the essential metadata. As a participant in our discussions noted, exit surveys of library users report that patrons are generally happy with their experience and happy with the books they take from the library. However, a significant percentage leave with items other than those they intended to borrow. This is similar to the experience of bookstore customers. This observation is reinforced by the findings of a 2018 survey of book readers conducted for the Eastbound conference.

Library catalogues and collection circulation systems also generate awareness of books. Borrowers using the library catalogue – today always digital – can search the library’s collection, just as they search books available from Amazon.ca or Indigo.ca. Online library catalogues provide book descriptions, author biographies, cover images, reviews or review quotes, details of prizes, and even reader comments. They operate as recommendation engines, suggesting other titles the user might like. Beyond their catalogues, libraries use their websites to make recommendations and provide lists of related reading to suit individual interests or book club tastes. These recommendations have a major impact on readers’ choices.

Library e-book lending is, of course, entirely digital in its operation, with searching, discovering, and borrowing all conducted digitally by the user. The dominant supplier of e-books and e-book lending platforms to English-language Canadian public libraries is Overdrive, a US-based subsidiary of Japanese multinational Rakuten, which also owns Kobo, originally a Canadian-owned competitor of Amazon’s Kindle. Overdrive has sophisticated software to describe books and to recommend a range of similar titles to individual borrowers.

The critical role of public libraries in creating awareness of books – through physical copy display, presence on shelves, and the library’s digital infrastructure – is well documented. An Ekos study conducted in 2015 asked a sample of English-language book readers: “Where do you find out about books that you want to read?” A substantial 41 per cent responded: libraries. Only friends/family and bookstores ranked higher (at 72 per cent and 52 per cent, respectively), with online bookstores at 45 per cent.¹⁰

A small-sample survey of about 400 book readers conducted in spring 2018 for a presentation to the Eastbound 2018 conference reported similar numbers. There were 25 per cent of respondents who identified public libraries as having an important role in their discovering new books and authors, which was virtually identical to retail bookstores (at 26 per cent) and online bookstores (22 per cent), ahead of “traditional” media at 17 per cent,

but similar to online/social media (28 per cent). In the same survey, 70 per cent of respondents who had visited a public library in the past six months “somewhat agreed” or “strongly agreed” that they often discover new books and authors by browsing shelves and displays at their public library. Reinforcing that number was the fact that 35 per cent reported that on their last visit to a public library they were there to browse, while 39 per cent went to get a specific book or author, and 26 per cent were there for both reasons. The same respondents reported that a high percentage of the books they borrowed was as a result of browsing.

Confirming the results of many other studies, the library users reported that they were “very interested” (21 per cent) or “somewhat interested” (34 per cent) in reading books by local and Canadian authors. The public library users reported that they “strongly agree” (25 per cent) that their library has a good selection of Canadian and local authors, and another 38 per cent “somewhat agree.”

This suggests that public library users currently see their library as a good source of Canadian-authored books. The survey also found strong support for more emphasis on Canadian books – 26 per cent of respondents said they would be very positive about such an emphasis, while another 41 per cent said they would be positive. Only 3 per cent said they would be negative, and another 4 per cent didn’t know.

Though this study is based on a small sample, it gives an initial indication that the discovery role of public libraries is very significant for public library users. It also indicates that there is wide public support for the current role of public libraries in creating awareness and readership of Canadian books and for an enhancement of that role.

Other studies have reported similar results regarding the role of public libraries in generating awareness. BookNet’s 2017 reading study found that 30 per cent of book readers reported that public libraries are a source of awareness for the books they read, the same percentage as was reported for all social media combined. Considering that 46 per cent of the population say they are public library visitors, this number suggests that virtually everyone who walks in the door of a public library finds the library to be a source of awareness and information about books. That statement may seem obvious, and it will not surprise any librarian or any public library user, but it has great significance when considering the role for public libraries in generating awareness and encouraging the reading of Canadian-authored books.¹¹

Collection policies and practices

Public libraries have undergone a gradual but dramatic shift in their acquisition and collection policies and practices. Until the late 1960s and early 1970s, many public library systems made a priority of acquiring books they deemed high in literary quality, the better to serve their users. This led them to resist pressures to increase the presence of Canadian-authored books in their collections. Canadian books were considered less accomplished and, therefore, less appealing than the best works of British and American authors. Libraries also steered clear of genre fiction in mass-market paperback form, represented at the time by such lines as Harlequin Romance. This understanding of the library's mission made the introduction of books in languages other than English, in neighbourhoods where Chinese, Portuguese, or Italian were strongly present, controversial.

Public library systems have since revolutionized their approach to collections. Librarians strive to match their supply and selection of books with the demands of their patrons. An institutional commitment to free expression and a dedication to serving the reading interests of their users now underpins key collection practices in Canadian libraries. Responding to library patrons' interests and providing the books users want to borrow and read is a fundamental principle of public library collection policies. Following this principle generates high levels of user satisfaction with public library services, high use of public library collections, and high circulation numbers.

Current practices in public library collection management include these key measures:

Profile building

Many public library systems build profiles of criteria for the books they want to offer. These criteria are based on data about the reading interests they see expressed in their circulation statistics. Many systems find that fiction makes up the majority of their circulation, particularly genre fiction like mystery, romance, and science fiction. Their criteria for collection-building prioritize these categories.

Outsourced book selection

Having identified the profiles that define their priorities for collection building, a significant number of library systems contract out the work of selecting individual books and deciding on the distribution of these books among their branch locations to library

wholesalers. A library system may outsource selection for some categories of titles while retaining that function in-house for others.

Book selection personnel at library wholesalers, themselves professional librarians, work from each library's collection profile to make selection and distribution decisions and work within the system's spending budget.

Coordinating the appearance of new titles

Another element in collection building and management relates to the timing of decisions and the arrival of new books in library systems. Public libraries try to anticipate consumer demand and ensure that new books are purchased and delivered to their branches just when consumer awareness is peaking. Ideally, new releases arrive on library shelves at the same time as they appear in bookstores. Awareness building for new books typically takes place in the weeks immediately before and after this arrival date. When the process works well, public libraries gain the maximum circulation benefit from every new title they place in their branches.

Wider title range, fewer copies

The relatively recent practice of acquiring a wider range of titles by buying a smaller number of copies of each title is at least in part a consequence of system-wide digital circulation management software. Digital catalogues make it easy for a user or a librarian to locate a requested or searched-for title somewhere in the library's system. A book does not have to be on the shelf of the local branch for the user to find it. Coupling the digital catalogue with an efficient method for moving books from one branch to another means that an available copy can be in the user's hand in short order. With this technology, fewer copies of a title can efficiently meet demand.

Hold

Another collection-management practice that is easily managed with digital collection software is the "hold" function, which allows a library user to join a waiting list for a work currently not on shelves but lent to another library patron. Holds increase the circulation efficiency of every physical copy of a book in the system. At the same time, they offer reasonable satisfaction to a library user. While the best service to users is to put a copy of a requested book in their hands immediately, the promise of access in the near future is

considered good service by most. Holds have the additional benefit of allowing collection managers to adjust for misses by book selectors: Holds accumulating on a new title demonstrate that the book selector failed to accurately anticipate demand for that title. Collection managers review hold statistics regularly and use them to augment their initial purchase decisions when demand warrants. (Overestimates of demand do not trigger the opposite transaction, i.e., libraries do not typically return books that prove to generate lower demand than expected.)

Public library materials purchasing

Public libraries mostly purchase their print and e-book materials from intermediaries, not from publishers. Print books are purchased from specialist library wholesalers, though some library systems purchase some books directly from publishers. The public library wholesaling business is Canadian based and Canadian owned, and it includes large firms with a regional or national reach and smaller firms with a specialized offering or with a provincial or local reach. Wholesalers offer public libraries a range of services, including one-stop shopping for books from all publishers, book selection based on library-supplied profiles and budgets, and cataloguing and processing of books ready for branch library shelves. There is vigorous competition among wholesalers for public library system business. Library systems generally tender for wholesaling services, and a system may use the services of more than one wholesaler for their print materials.

While wholesalers compete for business on the basis of the quality and speed of the services they offer, much of the competition among the firms is based on the discounts they offer on list price of the books they supply to a library system. Discounts vary depending on the size of the library system and its requirements. We are informed that for large public library systems, the discounts offered by wholesalers can be 40 to 45 per cent off publishers' list prices. Discounts are important because many public library systems have materials budgets that are not increasing, so receiving the best possible value for every dollar spent is vital for maintaining and improving services to library users.

Wholesalers selling to libraries at 40 to 45 per cent off list prices are buying their books from publishers and distributors at significantly greater discounts – usually ranging from 50 to 60 per cent. The deeper the discount offered by publishers, of course, the bigger the margin the wholesaler earns from their sales. The large multinational publishers operating in Canada can afford to sell their books at these discounts and remain profitable. Since the vast majority of the books they are selling are imported into Canada and have their devel-

opment and start-up costs covered by sales in their home market, the cost to the originating multinational publisher of the run-on copies sold in Canada is the cost of printing the run-on copies plus export royalty, distribution, and marketing costs. In contrast, Canadian-authored titles developed and published by the multinationals or by independent Canadian publishers also have to cover their development and start-up costs from sales in the Canadian market. Multinational publishers in Canada sell their Canadian-authored titles to libraries at the same deep discounts as their foreign-authored titles. Independent Canadian publishers, however, generally sell their books at significantly lower discounts to wholesalers.

This set of circumstances, and particularly the fact that library wholesalers sell all of their books to public libraries at a single contractual discount, means that library wholesalers generally earn better margins when they sell foreign-authored books and Canadian-authored books published by multinationals than when they sell Canadian-authored books published by independent Canadian publishers. Multinational publishers earn better margins when they sell foreign-authored books to wholesalers than when they sell Canadian-authored titles.

Given that the marketplace is organized this way, the unintended consequence is that the supply chain has a built-in structural bias away from Canadian-authored books, specifically those published by independent Canadian publishers.

Public libraries' digital infrastructure

Most public library systems in Canada have fully digitized their cataloguing and circulation operations. Digital infrastructure has allowed public library systems to be far more efficient in their use of personnel and to give library users better access to information about books in their collection and a better experience as a library user. Canadian public libraries acquire their digital infrastructure from specialist suppliers who develop library systems. The major systems in use come from US suppliers.

This infrastructure currently does not allow Canadian-authored books to be easily identified. The cataloguing standards and practices used by public libraries are international in scope (heavily influenced by the United States) and are usually not currently structured well for incorporating this piece of information. Local cataloguing practices can provide more complete information, but these practices are not consistently applied. The result is that it is often impossible for a librarian looking at information about a book to know for

certain whether that book is written by a Canadian author. Cataloguing standards do, of course, support the identification of books that are on Canadian subjects, but public library digital infrastructure means that Canadian books as a category are often not easily visible to library systems, librarians, or library users.

Book selection tools and procedures

To understand the outcomes of public library book selection, we looked beyond the policies and practices to the tools that are used in the selection process. These assist librarians and wholesalers in responding to user demands accurately and in the most timely way possible.

Catalogues and supporting information

The first tool used by wholesalers (and by libraries whose librarians retain the book selection function) is the publisher's seasonal catalogue, which is the source of essential meta-data about new books: content descriptions, author biographies, sample chapters or even complete texts, specifications, and promotional plans. Independent Canadian publishers present this information for a few thousand new Canadian-authored titles annually. The multinationals do the same for several hundred new Canadian-authored titles – plus tens of thousands of titles by American and other international authors. This enormous array of new products poses an unenviable challenge for library collection building.

Sales rep recommendations

To sift through these lists and find the books that users are most likely to want to borrow, library selectors depend on a second resource, the publisher's sales representative. The sales rep is likely to have reliable additional information about bookstores' responses to a new title, the marketing campaign behind it, and realistic projections of consumer response. Reps help librarians by identifying their "top titles" for the selectors' attention.

Professional book reviews

A third important tool enabling good book selection is the professional library-focused book review. All library book selectors make extensive use of the reviews that appear – well in advance of publication – in the leading library book review resources: *Library Journal*, *Publishers Weekly*, *Kirkus Reviews*, and a few others.

Canadian books in the selection process

The collection policies and procedures just described very closely resemble those used in US public library systems. That is natural, given that the vast majority of the books being considered, selected, purchased, and distributed in English-language Canadian libraries come from US publishers and US authors. Processes that work well for imported books, however, have unintended consequences for Canadian books.

Profile building

Public library collection profiles are built to implement the goals and objectives of public library systems, which usually means purchasing new titles in the genres that users favour in order to achieve maximum circulation. Because there are no consistently articulated goals and objectives expressing a priority or special cultural value for Canadian books, most collection profiles do not call on selectors to give any particular importance or weight to Canadian books compared to all the other books they are evaluating. For many selectors, books are books.

Outsourced selection

Book wholesalers' personnel, like other professional librarians, recognize the quality and appeal of Canadian-authored books. Their work demands that they be familiar with Canadian authors, just as they are with foreign authors. In their selection work, however, they are dealing with multiple suppliers and varying practices regarding pricing and discounts. As noted above, Canadian book wholesalers typically earn higher margins on their sales of foreign books and Canadian-authored books published by multinationals compared to Canadian books from independent publishers. This creates a built-in structural bias toward imported books over many Canadian ones. Even if independent publishers sought to match terms available from the multinationals, the margins available on imported books mean that independents' terms can always be bested by multinationals.

Coordinating the appearance of new titles

In the last few years, publishing timelines in Canada have been adjusted so that independent Canadian publishers are releasing their catalogues and new title information in the same time frame as multinational publishers. Most Canadian-authored books are now on an equal footing in this area.

Catalogues and selection tool information

Canadian publishers have been endeavouring to provide greater depth of information to public libraries about new books. Information goes beyond book descriptions, author biographies, and covers to include tables of contents, sample chapters, printed advance reading copies (ARCs), promotion plans, and other supplementary materials.

Canadian-authored and independently published books are catching up with foreign books on this score, but there remain weaknesses to be overcome.

Sales rep recommendations

Many public library systems and library wholesalers consider themselves well served by sales personnel representing the multinationals but less well served, or not served at all, by sales reps for independent Canadian publishers. This is surprising, since virtually all independents have sales forces that call on and maintain relations with public library systems and library wholesalers. It may be that because independent publishers represent such a small percentage of their buying, wholesalers and libraries find there is never enough time to get to their offerings. (Any one of the multinationals represents a bigger share of library buying than all the independent Canadian publishers combined.)

It may be a reflection of the nature of the catalogues and lists. Sales reps for the multinationals, with thousands of new titles to sell, can easily isolate the “top titles” from their lists for the attention of library selectors. Reps for the independent Canadian houses are offering books that often have relevance and interest to all Canadian readers, including public library users – that is why they were taken on by the publisher in the first place. Only when a publisher is publishing local or regional titles is it obvious that, beyond that local or regional market, a Canadian title is not likely to be a “top title.” Cherry-picking only a few new books from an independent Canadian publisher’s list means that the majority are unlikely to be considered for purchase for library branch collections. This practice means that book selectors can easily miss many Canadian-authored titles that would appeal to library users and fit the profiles established for library collection decisions.

Professional book reviews

Public library book selectors will typically find multiple professional reviews in the major US library review periodicals for most of the US titles they are considering. The reviews are available to them as selection tools when they are making their decisions. For many

new Canadian titles, no such reviews are available at the time selection and purchasing decisions are made.

This reflects another difference in industry practices. There is relatively little professional library book reviewing of adult titles in Canada. *Quill and Quire* is the most prominent review vehicle, but it has space to review only a modest number of new Canadian adult titles annually. Other publications, such as *Canada's History*, *Literary Review of Canada*, *Canadian Geographic*, and the *Globe and Mail*, along with the very few other daily newspapers with book pages, have to meet the need for both professional and consumer book reviews. But these reviews are timed to appear when the book is available to the public in bookstores – several months after public library book selectors have made their choices.

Canadian children's books, however, benefit from a much more active professional reviewing community, with four major review sources: *Quill & Quire*, *Canadian Children's Book News*, *CM: Canadian Review of Materials*, and the National Reading Campaign. In addition, there are important recommended lists based on library reviews and outside evaluation. These reviews, too, invariably appear after selection decisions are made. In fact, some library wholesaler book selectors are unaware of these sources and make no use of them. The issue is timing, not budget – most of the key Canadian resources are available at no cost to Canadian librarians.

The absence of review resources at the time selection and purchase decisions are made creates a serious handicap for Canadian books in the public library selection process. Understandably, library selectors are more likely to opt for books that are recommended and praised by professional reviewers in prestigious US library publications, rather than Canadian books for which they have to rely on information from the publisher or their own knowledge of the author and the subject.

Canadian publishers exporting their books to the US market have conformed to publishing schedules there in hopes of winning reviews from US library publications. Children's publishers are particularly well positioned to do this, and they have adapted to requirements for early support materials. The ironic result is that Canadian public library book selectors are relying on US librarian reviewers, with American priorities and relevance in mind, to evaluate the quality, appeal, and relevance of Canadian children's books.

Publishers of Canadian-authored fiction likewise work with the requirements of the US market, and a number of new Canadian-authored books come to the attention of library

selectors every season because they are reviewed in advance of publication in US library periodicals. Publishers of Canadian non-fiction are in a less advantageous situation, particularly when the subject matter of their books is relevant to Canadian readers but not to American audiences.

Wider title range, fewer copies

Today, Canadian-authored books that are intended to appeal to broad reading audiences are typically bought in quantities that place them in 10 to 40 per cent of public library branches. In relatively few instances are new books bought in quantities that would place them in 80 to 100 per cent of library branches. The result is that these books do not exist as items to be discovered through the browsing and display function of public libraries in 60 to 90 per cent of public library branches.

Public library managers, as noted, have learned how they can meet the demands of users effectively with buying policies that do not place one or more copies of every book they wish to provide to their patrons in every branch in their system. Increasing access to Canadian-authored books does not mean one copy per branch. There are substantial opportunities for increased access by moving up from 10 to 40 per cent to a higher percentage that nevertheless remains below 100 per cent.

By purchasing a wider range of titles in smaller per-copy quantities, a public library system is diminishing each book's presence in displays and on shelves and losing opportunities to raise awareness of Canadian books. The same is true, of course, for non-Canadian books in the system. Important to note here is that foreign-authored books arrive in Canada with a substantial "awareness advantage." The advantage arises from the coverage these books receive in the digital and traditional media in their home market, coverage that spills over into Canada. Canadian readers become aware of books from the full range of Canadian and international media. Canadian-authored books, however, are likely to appear in only a fraction of those media – the ones that originate in Canada. In a context where public libraries play an important role in generating awareness of books, where imported books benefit from the spillover of US media coverage in Canada, and where there is no distinction in library digital infrastructure for Canadian material, the impact of this loss is more serious for Canadian books.

Holdings

Hold policies increase the reading of library copies of Canadian-authored books, just as they do other books. Canadian books are discoverable in public library collections' catalogues, as are all other books. This feature of library digital infrastructure does not currently allow librarians to highlight their holdings of Canadian books nor to give them priority or special attention in their recommendations to library users. Analysis of library holds could be undertaken to see whether Canadian-authored titles have higher numbers of holds than other books. This would give library managers a way of measuring whether their current collection building decisions do reflect library user demand for Canadian content.

The impact of public library policies and practices on awareness and reading of Canadian books

As collection and acquisition policies are currently structured, the average public library user is exposed to a small percentage of all new books that appear in any year. That is the inevitable consequence of burgeoning book publishing, compared with the relatively static physical space available in Canadian branch libraries. With collection development policies that give new books by American, British, or other authors the same priority as new books by Canadian authors, the result is that only a fraction of Canadian books currently benefit from the public libraries' ability to create awareness and reader demand.

Forecasting user demand and responding to it has unintended consequences for the place of Canadian-authored books in public libraries. Books by non-Canadian authors come to the attention of Canadian readers through the full range of awareness channels originating internationally and operating in Canada. Canadians are avid users of both mainstream traditional media and digital media originating in the US, and these media generate a wide range of awareness of US, UK, and other authors in Canada. These books have an awareness advantage in Canada.

Canadian digital and traditional media create awareness of Canadian authors and books, but of course they create awareness of foreign authors and books as well. When public libraries are user-demand driven in their collection policies, it follows that their collections will have a heavy representation of foreign authors and books that have benefitted from awareness generated both by media originating abroad and by coverage in Canadian media.

The many changes that have occurred in library collection management have had the unintended consequence of reducing the presence of Canadian-authored books in public library branch collections. There have been no reliable statistics on Canadian content in library collections, so the change cannot be quantified. However, our view is that, all practices taken together, it is likely that Canadian books account for a declining share of books borrowed from public libraries. The less borrowing there is of Canadian books, the less reading there is of them.

BookNet Canada, together with the large public library systems and library software vendors, has been developing digital infrastructure to produce data on public library collections and circulation similar to the data available about bookstore sales through its SalesData service. The data will allow libraries to analyze their holdings of Canadian-authored books and to monitor circulation of these books. A preliminary data sample from a small percentage of public libraries showed that, in those library systems, Canadian-authored books accounted for six per cent of total circulation in that sample in April 2018. Further results as the BookNet service comes into full use will provide a more accurate measure of current public library operations and enable us to measure the impact of any measures introduced to generate higher awareness and more reading of Canadian-authored books. This service will also permit libraries to monitor the share of Canadian-authored books in their collections in key genres and subjects and to track the reading of Canadian-authored books in different genres and subjects.

Some aspects of public library operations contribute to the exposure of Canadian books, among them listings in digital catalogues, inclusion in librarian recommended reading lists, and the involvement of local authors at library-sponsored events. However, the current practices of public library systems do not maximize the potential of libraries in this endeavour.

E-book reading

E-book reading merits special attention. Most large public library systems in Canada rely on the US wholesaler, distributor, and infrastructure provider Overdrive for their e-book operations. English-language Canadian public libraries use Overdrive software to manage their e-book collections, including the lending process. (French-language publishers rely on digital infrastructure from DeMarque, a Quebec-based company.) Overdrive's software also governs the discovery process, where library users search for or browse available e-books.

Overdrive also functions as the vendor of books in e-book format to libraries; its users are required to purchase their e-books from Overdrive. Publishers, including Canadian publishers, who wish to sell their books in e-book format to libraries have to make them available through Overdrive's wholesale operation. Publishers can set the library price for their e-books, but Overdrive sets the terms on which the books can be sold (for example, no limits on the number of times an e-book circulates) and demands a substantial share of the library purchase price (often 50 per cent) as its margin for handling the sale.

More important for the role of libraries in providing access to Canadian books is that the structure of Overdrive's software makes it very difficult, though perhaps not impossible, for users to distinguish Canadian-authored titles. Mingled with foreign-authored titles, they are not distinctively tagged or featured. In non-fiction categories, Canadian subjects cannot be separated from American subjects. When public library systems purchase Canadian e-books for their users through Overdrive, users are unlikely to notice that a small segment of the library's collection is Canadian. The opportunities to promote and support the discovery of Canadian-authored e-books are currently truncated or non-existent.

However, some public library systems have introduced alternative approaches to e-book collections and lending. A Nova Scotia initiative, now in its third year, has demonstrated that public library users respond very positively when they can easily discover and borrow Canadian e-books. This "Read Local" operation runs as a separate, local content platform within the Overdrive software environment. A more recent undertaking in Alberta, which offers public library users access to virtually all Alberta-published e-books, relies on the DeMarque platform. This initiative has been implemented, but generating awareness and readership is the challenge being addressed by the provincial government, public libraries, and publisher partners involved in this project.

The lesson from these innovations is that when public libraries create an infrastructure to give easy and well-promoted access to Canadian-authored e-books, users discover, read, and enjoy them to a much greater extent than when they are indistinguishable in a large assembly of non-Canadian works.

Canadian-authored books: an opportunity for public libraries

This survey of current practices and policies in English-language public libraries documents a great opportunity: Libraries can reinforce their function as valued community cultural institutions by championing local, regional, and nationally recognized Canadian authors and books.

Branch public libraries have the ability to supply many hundreds of new Canadian books every year. Free of the commercial constraints felt by bookstores, public libraries can present their users with an enticing array of new books combined with a deep offering of popular and successful recent or older titles – a collection far richer than what is available anywhere else in the community. This has cultural value in itself.

The available research on reading and attitudes indicates that this initiative would be warmly welcomed by library users. Canadian readers express very positive attitudes toward Canadian authors and Canadian books. As BookNet reports: “Over the past 15 years, impressions of Canadian authors have improved. In 2017, 84% of book buyers were ‘moderately,’ ‘somewhat,’ or ‘very’ impressed with Canadian-authored books, compared to only 70% in 2012.”¹²

Readers also report a strong positive interest in reading Canadian: “We asked Canadian book buyers how interested they are in reading books by Canadian authors and the majority (84%) said they are either ‘very’ or ‘somewhat interested,’ which is up from 75% in 2012.”¹³

Among book readers who said they had not read a Canadian book in the past 12 months or who did not know if they had, BookNet found a surprisingly high interest and positive attitude toward Canadian books. As the report points out, “43% of book buyers are interested in reading Canadian books but aren’t already, or don’t know if they are. This could be a missed opportunity that perhaps points to a shortage of identifying information on products or retail displays (physical and online) that showcase Canadian authors.”¹⁴

These findings suggest that initiatives to increase the availability and presence of Canadian-authored books in public libraries would be welcomed and supported by the public. As a result, this would contribute to the value citizens place on their local public library systems.

There may seem to be a contradiction between these survey findings and the actual behaviour of public library borrowers – and the books they borrow. We think that this underlines a conundrum in public library operations: Public library systems seek to *respond* to demand through their collections policies, but, at the same time, their day-to-day activities *create* demand for books.

Given the decline of traditional media in Canada that have a role in creating awareness of Canadian books, the public libraries’ role in generating awareness is becoming even more

important. We believe that this is an important opportunity for Canadian public libraries to play a larger role in the cultural and literary life of the country, to offer authors and publishers greater access to the reading public, and to give readers access to Canadian-authored books they would otherwise not be aware of.

One of our think tank participants briefed us on the role of public libraries in countries where the national language and culture is challenged by powerful neighbours with rich cultural lives. The citizens of Holland and the four Scandinavian countries are almost all readers of languages other than their own and are familiar with books and authors from larger countries with substantial and attractive cultural lives. One of the policy measures used in those countries to sustain writing and reading in their national language is strong support for the public library system and collection policies that ensure their own books and authors are well represented and highly visible in those libraries. This approach reflects the interest and commitment to the national language and culture that we see in reader surveys in English Canada.

We see an opportunity and a need for initiatives that give public libraries a central place in the appreciation and promotion of Canadian books, and we believe that this is an opportunity for a major cultural policy initiative from the federal government as a strategic measure to close the gap that has arisen between the creation of Canadian books and the public's awareness of these books and access to them. We are proposing a set of measures that would give public libraries a central role in Canadian books. The first call to action is:

18. Public library systems should crystallize their role regarding Canadian culture and Canadian books by incorporating in their collection policy the objective of making known and available a wide range of Canadian-authored books in all genres and on all subjects to all public library users.

A high-level collection policy incorporating this objective adopted by public library systems or by provincial culture departments could be implemented through guidelines and measurement, including statistics on Canadian authorship of books in library collections, circulation of those books, and spending on them. This would give library managers and boards an overview of their system's role in creating awareness and readership of Canadian books.

Some of our participants consider that this policy measure alone would lead to library systems enhancing the presence of Canadian-authored books in their awareness and supply activities. A more robust approach would be to modify library practice to establish

a separate materials category for Canadian-authored books, which would parallel the separate categories managed by libraries for other important types of materials, such as e-books, periodicals, databases, and films.

Typically, there is a specific allocation of the overall materials budget to each category, a separate acquisition practice with specialized suppliers, measurement of the size of the system's collection, and measurement of the use of the materials. Libraries recognize that the decision about allocating a materials budget among these categories is an important annual policy decision, just as is determining what amount of the total system budget is allocated to materials. Major library systems report on their spending and their activities for each of these categories.

We believe that establishing and maintaining a separate category for Canadian-authored books alongside the other major categories of materials is the approach that has the greatest potential to enable libraries to successfully implement this policy. It would allow for a different approach to purchasing, which could level the playing field between Canadian-authored titles offered at deep discounts by multinational publishers and Canadian-authored titles published by independent Canadian publishers who can only afford to offer somewhat smaller discounts. We are therefore making this recommendation:

19. Public library systems should establish a separate budget category and a separate collection development structure for purchasing, building, and maintaining branch collections of Canadian-authored books alongside other categories of library materials.

We acknowledge that public library systems could achieve the policy goal set out in recommendation 19 without taking this additional step, and we note that the public library participants in our think tank did not believe that this step is called for. We agree that it is not necessary, but it has important advantages: It would allow the discount gap to be simply addressed in library supplier tendering, it gives clear visibility to Canadian-authored books as a major category of library materials, and it could be a step toward public library participation in an accredited bookstore policy, as discussed in the previous chapter of this report. The latter would also ensure that libraries direct their spending on Canadian-authored books to bookstores, supporting those bookstores' presence in the community.

Public libraries face many demands on their limited funds, and the materials budget is often difficult to protect or enlarge since it is much more easily modified than spending on other major items, such as staff and buildings. We understand that any recommendation

that public libraries increase their spending on Canadian-authored books would be troubling for public library systems, since it can be read to imply that they should spend less on other items.

As we have already noted, provincial and federal governments are currently devoting substantial resources to contribute to the costs of creating Canadian-authored books through programs for writers and Canadian-owned publishers. These programs are vital and help create a rich stream of new Canadian-authored books by writers and publishers located all across the country and in virtually every genre. What is lacking is awareness and access to these books.

The single most efficient and effective measure to start filling this gap is a greater presence of Canadian-authored books in public library systems large and small across the country. This greater presence can be achieved without libraries having to restrict access to other materials, providing them with additional resources for their collection building. Collection funds are in short supply in virtually every Canadian public library system. From a public policy point of view, new spending that might range from \$10–15 million annually to double existing spending by public libraries on Canadian-authored books is a modest but effective incremental cultural measure that would have high visibility and high public acceptance. It would also substantially increase the results flowing from existing programs that support writing and publishing.

We anticipate that many public library systems would welcome such a funding initiative and would take advantage of it to offer their users a greater range of Canadian-authored books. We recognize that the demand for specific new Canadian books is not as intense from public library users as it is for many of the other books public libraries are currently providing. We believe this is due in large part to the “awareness gap” mentioned above. By providing public library systems with additional funds for collections, to cover the costs of this policy initiative, libraries and their users would experience no diminishment of the inflow of books by international authors. The experience would be one of an enrichment of new books by an additional flow of new titles by Canadian authors.

There are precedents for federal government programs of support for the activities of public libraries, reflecting larger public policy objectives. In 1967, the year of the Canadian Centennial, Ottawa offered funding to place large collections of Canadian books into public libraries across Canada. A second precedent was the CAP (Community Access Program), which was undertaken by the federal Department of Industry in 1994 and ran with federal funding until 2012. This program addressed the public policy priority of widening

internet access to Canadians, particularly those in rural and small town communities and poorer neighbourhoods. It was championed at the time by the minister of industry. The program provided funding for public libraries and other public facilities to offer community access to the internet (for a brief description, see https://en.wikipedia.org/wiki/Community_Access_Program). Our recommendation is:

20. The federal government should institute a new Canada Book Fund component to augment existing public library system spending on Canadian-authored books, matching current spending and every incremental public library system dollar thereafter.

This proposal recommends a program that would be open to public library systems interested in offering users a wider collection of Canadian-authored books. We expect that the take-up for this program would be moderate in the first year or two and that the experience of early users would be important in discovering the response of library patrons and the impact on circulation. Positive early results from this initiative would, we believe, lead to widespread use of this program by public library systems of all sizes across Canada.

Some provinces might have concerns about direct federal funding to their public library systems for constitutional or other reasons. In these cases, the federal government could provide the support through agreements with these provinces' public library services.

Parallel to providing funding to support a major increase in the presence and availability of Canadian-authored books in public library branches is a measure to enhance public library digital infrastructure. This would allow the initiative to have maximum impact and visibility. Public libraries need enhancements to their catalogue and circulation management software to capture, display, and allow searching of Canadian authorship.

Canadian public libraries generally do not have the functionality to incorporate a tag in their cataloguing information and software that identifies a title authoritatively as Canadian-authored. Public library systems often report that this information about book authorship is not currently available to them. Over the past decade, BookNet Canada has worked with all Canadian publishers to provide this piece of information for the books they publish or distribute, and it has encouraged book distributors and library wholesalers to capture it and make it available. This required a change to the international standard developed for the exchange of bibliographic information about books in the marketplace

(the ONIX specifications). Libraries rely on another international standard, MARC, which does not currently have a field to identify the nationality of a book's author. There are fields that could be adapted for that purpose in Canada, and in the long term the MARC system could be upgraded to allow for this data to be incorporated in a standard way in all MARC records. There are other ways that Canadian public libraries could identify Canadian-authored books in their digital systems. The public library community in Canada should address this issue, and the costs of this digital infrastructure initiative should be considered part of the overall investment needed for public libraries to play a larger role in providing Canadians with information about and access to Canadian-authored books. Hence this recommendation:

21. Federal funding support should be provided for the incremental costs of improving the digital infrastructure used by public libraries for collection management so that Canadian-authored books can be identified as such in library catalogues and users can easily search and discover Canadian-authored books.

The two previous recommendations would create an important opportunity for public libraries to play a larger role in promoting, displaying, and offering branch library users a greater range of local, regional, and Canadian authors and books. Public libraries have always considered one of their key roles to be sharing information about interesting and important new books with users. Digital media offer new and appealing ways for public libraries to get the word out to users about books and authors. Library websites and libraries' presence on social media offer an opportunity to create awareness of new Canadian-authored books that library users are not hearing about through other media channels. Many library systems would welcome access to more resources to enhance their current digital operations. There is also a potential role for library organizations to create digital assets to promote Canadian books and authors that could be made available to public library systems. Our recommendation is:

22. As a component of a federal program of support for enhancing awareness and reading of Canadian books via public libraries, funding should be made available to public libraries to cover a substantial portion of the costs of digital promotion initiatives featuring Canadian-authored books.

Regarding public library policies and practices concerning the purchasing of print and e-book copies of Canadian-authored books, we note the practice in Quebec that a component of the accredited bookstore policy is that public libraries purchase all their books

from accredited bookstores. As noted, these purchases are one of the streams of revenue that support the extensive network of accredited bookstores in Quebec.

Consideration of an accredited bookstore policy in English Canada will be at the provincial level. As noted above, we are recommending that a version of the accredited bookstore policy be put in place across the country. A component of this policy could be that the public libraries in a province move their purchasing to bookstores. A more modest approach would be for public libraries to purchase their Canadian-authored books from accredited bookstores. This would support expanded selections of Canadian-authored books in those stores and would generate moderate incremental sales revenues for the bookstores.

Some public library systems in English Canada currently purchase books from bookstores, and there have been experiments with this approach by other libraries and by bookstores that have not worked out satisfactorily. To meet the needs of public libraries, bookstores would need to supply the same package of services libraries receive from their current suppliers. These could include selection services based on profiles and budgets, cataloguing, and processing so that books are shelf-ready. Libraries look for fast delivery of new titles, so books appear on their shelves at the same time as they appear in bookstores.

The most important advantage of the public library systems' current suppliers is pricing. As noted, major public library systems are receiving discounts of 40 to 45 per cent when they buy books from their current suppliers. In contrast, independent bookstores buying from publishers are often receiving discounts of 40 to 45 per cent. When bookstores sell to school or public libraries, they typically offer a 20 per cent discount – and report that it is difficult to cover their costs when they sell on these terms. This has led booksellers who have sought to sell to the library market to set up wholesaler divisions in order to receive the very favourable discounts offered to wholesalers by multinational publishers. We have been informed that these efforts have not worked particularly well for the bookstores or for libraries, and they are not a major factor in the market today.

The impact and benefit of public library purchasing on bookstores is most obvious outside of major urban centres. In smaller cities and towns, public library purchasing from a local bookstore can be an important source of revenue that contributes to the viability of that store. There is also likely to be a match in the scale of the purchasing and the size of the retail operation. In contrast, a large urban public library system would be a challenging customer for any single bookstore in that city.

Public policy can solve the pricing issue, and it did so at the time of implementation of the accredited bookstore policy in Quebec. The benefits of a stronger network of independent bookstores, set out in this report earlier, would justify a provision in funding support for Canadian-authored book purchases. Library systems opting to purchase from accredited bookstores in their province would receive federal funding adjusted to account for the higher cost of books purchased from the bookstore, as compared to the pricing from the library's supplier of other print books.

The decision about whether some or all public library book purchases should be directed to accredited bookstores is part and parcel of developing a policy appropriate to the circumstances of individual provinces and territories. What works in Newfoundland may well not work in Ontario. Our recommendation is that the appropriate overall federal policy would cover off the price issue, so the provincial or local level decision is made on the basis of the specific circumstances in that jurisdiction:

23. Federal funding for Canadian-authored book collection development in public libraries should be adjusted to compensate for the higher costs experienced by libraries moving their Canadian-authored book purchasing to accredited bookstores.

A doubling of the spending on Canadian-authored books, and hence a dramatic increase in the numbers and visibility of those books, would have an immediate impact in branch libraries across the country. It would not lead to every Canadian-authored book being available in every public library branch of participating library systems, an approach that would not reflect libraries' understanding of patrons' reading interests. It would, however, double the range of Canadian-authored books available to users in every branch. It would also give libraries and their users a promotable new offering, over and above existing collections. Upgrading library digital infrastructure to incorporate Canadian authorship and supporting library promotion of Canadian books would also increase the visibility of these books.

Think tank participants underscored the value and importance of public library librarians and users enhancing the identity of Canadian-authored books for the books themselves. There is a particularly promising opportunity for independent Canadian publishers to enhance awareness not only of their Canadian-authored books, but of their role as publishers of these books. The parallel that was pointed out was the Canadian winemakers who set out to establish Canada as a recognized producer of high-quality wines, which could compete with those from traditionally recognized wine producers like France, Italy, and Germany.

We see this as a key contributor to the ultimate objective of creating awareness and generating reading of Canadian-authored books, particularly those from the independent publishing sector. The suggestion was that independent publishers help maximize the visibility of Canadian-authored books through the mechanism of a VQA-style labelling program. Readers could then easily identify new independently published Canadian-authored books on library shelves. Our recommendation is:

24. Independent publishers should ensure that new Canadian-authored books are identifiable with an industry-wide provenance label, which publishers and publisher organizations would promote to enhance the discovery of independently published Canadian-authored books.

The importance of this measure was underlined by public library think tank participants. It offers what seems to be an early and easy “win” that would give independent publishers a way of underlining the distinctiveness and value of their titles while also giving librarians a tool they are looking for to permit them to play a larger role in creating awareness and readership of these books.

Augmenting public library offerings of Canadian-authored e-books offers another opportunity to increase the discoverability of Canadian books. Here we have several calls to action:

25. Canadian public library systems should use their relationship with their e-book circulation management vendors to secure enhancements in this digital infrastructure to create awareness and manage the circulation of e-books, allowing them to identify and give priority and special presence to Canadian-authored books in their e-book collections.
26. Canadian public libraries should consider moving to a separate digital infrastructure for Canadian-authored e-books if this is necessary to allow them to deal with publishers and authors on business terms that offer fair compensation for the multiple use of e-books in their systems and/or to promote local/regional/Canadian e-book titles successfully.
27. Publisher organizations should collaborate with public library organizations to develop business terms for Canadian-authored e-book sales and the digital infrastructure required to support those sales in ways that are fair to libraries, publishers, and authors.

A strong working relationship has been developed between the large urban public library systems in Canada through their organization (CULC) and the Association of Canadian Publishers through its organization eBOUND. This could provide the venue for more discussion and action to move on these recommendations. Experience with individual initiatives in Nova Scotia and Alberta has pointed to opportunities and pitfalls associated with measures to increase awareness and readership of e-book versions of regional Canadian-authored titles.

We acknowledge that efforts to create awareness and support the increased circulation of Canadian print and e-books will require significant modifications to the existing digital infrastructure used by public libraries – or a shift to a new generation of infrastructure, perhaps combined with other digital tools such as a discovery layer. We heard, too, that there are serious shortfalls in the provision of complete and timely information about new Canadian books to public libraries. There are also major gaps in the way professional librarian book reviews reach librarians. To be truly useful, existing Canadian review publications need to operate with enhanced digital tools within library-friendly time frames.

Changes will require ongoing consultation and engagement among the key players involved in the supply chain for books to public libraries, including publishers, distributors, accredited bookstores, professional library review media, library organizations, and others. Professional networks in Canada have atrophied in recent years, and for these initiatives to be successful they must be rebuilt. We make several proposals to address these issues:

28. Publishers and librarians should reinstitute an annual professional conference for the exchange of information and for collaborative work on the measures that will enhance the role of public libraries in creating awareness and increasing the reading of Canadian books.
29. Library organizations' professional development programs, post-secondary curricula, and information channels should be encouraged to increase their coverage of Canadian books and Canadian publishing. Publishers should support and offer their participation in these efforts to help broaden librarians' knowledge of the writing and publishing scene in Canada.
30. Publishers and industry organizations should greatly improve their methods of providing public library book selectors with comprehensive and timely information

on upcoming Canadian-authored titles, including high-quality cataloguing data, and with ongoing promotional ideas – displays, promotions, and digital communication with patrons – to foster awareness and reading of Canadian titles in library collections. Appropriate mechanisms for creating awareness among branch library staff should also be developed.

31. Measures to provide better information and data to publishers about demand and use of books in public libraries should be encouraged, permitting publishers to initiate publishing projects to meet the needs of public library users.
32. Professional library book reviewing organizations and media should be eligible for funding support to help raise their profiles among librarians, increase their coverage of Canadian-authored books, operate on schedules that serve the needs of public library collections development, and ensure their resources are affordable for all public libraries.
33. Public library systems and publishers should collaborate in developing innovative measures and in implementing these and other proven steps to enhance the role of public libraries in creating awareness of Canadian-authored books through all means, including displays, promotions, and digital communication with users.
34. Development of digital infrastructure with the capacity to recognize and promote Canadian-authored books in public library collection operations and collection management, for both print and digital formats, should be eligible for funding support under an enhanced Canada Book Fund program. The enhanced digital infrastructure should allow full identification of the local and regional dimensions of the subject matter and authorship of Canadian books.

These measures would strengthen the role of public libraries in their community and would be powerful and relatively low-cost initiatives to give Canadians significantly greater knowledge of and access to the creative work of Canada's writers and publishers.

University Libraries, Bookstores, and Courses

A universe of 2 to 3 million individuals

According to Universities Canada, the association of Canadian universities and colleges, there were some 1.7 million students at Canadian universities in 2016, of which 1,016,000 were full-time and 290,000 part-time (the rest were described as “other”). There were also some 46,000 full-time professors, not counting sessional professors, adjunct professors, and teaching assistants. In total, Canadian universities provided employment to close to 250,000 people. This means that approximately 2 million individuals have access to Canadian books and journals, either online or in person, through university libraries and bookstores. In addition, an estimated 1,000,000 alumni enjoy some access to university libraries and full access to bookstores. That’s as many as 3,000,000 potential users and customers across the country.

Universities Canada counts 97 public and private not-for-profit Canadian universities and colleges in Canada, but as some are affiliated colleges of universities, we have put the actual number at 78. In our discussions, we tried to ascertain the levels of Canadian-published content among library book and journals collections at these universities, as well as Canadian-published and/or -authored content in university courses and spending on Canadian materials, insofar as such information is available. We also looked at course and trade book sales in university bookstores and the impact of the takeover of the management of many Canadian stores by a foreign firm.

University libraries

Roles, goals, and modern acquisition methods

Provincial governments are the primary funders of Canadian universities, with student fees, donations, and other revenue streams augmenting their budgets. Universities

also receive indirect funding from federal sources, such as research councils and other national strategic initiatives. The universities themselves set the budgets for their university libraries.

Like public libraries, university libraries are much-valued institutions that are driven by a public service mission. Central to that mission is a mandate to preserve knowledge through the acquisition and archiving of books, journals, and other documents. They serve professors, who can then conduct research, publish with appropriate outlets, and keep abreast of developments in their disciplines in order to enhance their teaching. They give students access to both cumulative and new research, which are resources with which they can prepare their assignments and graduate theses. Finally, university libraries assemble collections that speak to the history of their country. This is why the visibility and availability of Canadian materials is important – they offer students and professors a Canadian view of the world.

The majority of titles purchased by university libraries are academic books and journals, relevant to all the faculties present on campus. However, there is an important place in university libraries for trade books too – original fiction, poetry, plays, non-fiction, and reference works. Unique to university libraries is the acquisition of books and journals in a multitude of foreign languages: Scholars and students, especially those at the graduate level, need to be aware of the work that is being done in their field, whatever the language of origin. English- and French-language university libraries in Canada do buy books and journals predominantly published in their respective languages, but English-language books are well represented in francophone university libraries and vice versa.

In years past, in a print-based environment, collections librarians at university libraries researched publisher catalogues, scanned key journals for reviews and publication notices, and obtained academic committees' input to assemble a list of books that met their collections policies. Over the last three decades, however, the roles of collections librarians have become more complex, with an increase in the number of books, formats, and disciplinary requirements. As a result, the tools they use to identify potential book purchases have also changed.

Libraries employ a number of acquisition and ordering methods; the seven most important to this discussion (as summarized on Wikipedia) are:

- 1) firm orders for the specific books a library wants;
- 2) standing orders for all titles that fit a particular category or subject;

- 3) an approval plan document, sometimes running to hundreds of pages, that outlines for vendors and book wholesalers the parameters governing the library's acquisition decisions – publisher, scholarly level, format, pricing, and more – across a range of subject areas. Collections librarians develop approval plans to mirror their collection policies. Books are selected by the vendor and sent to the library, which is charged only for the titles that it accepts into its collection;
- 4) blanket orders, which are a combination of firm order and approval plan, from a certain publisher or vendor. The library contracts with the publisher or vendor to purchase everything that this publisher or vendor has available on a specified topic;
- 5) subscriptions, which are used for journals, newspapers, or other serials that a library will acquire. Subscriptions are usually for a specific length of time and must be renewed at the end of the contract;
- 6) leases, which allow access to particular resources, most often electronic resources such as databases, journals, and web-based materials, for a specific period of time;
- 7) patron-driven acquisition (PDA), also referred to as demand-driven acquisition (DDA), which is a user-driven selection model of library collection development in which a library provides full-text electronic access to a collection of books but only purchases materials for permanent retention when certain thresholds are reached for an item (e.g., number of requests or number of pages read).

Approval plans, the third method, now account for much of the acquisition workflow for medium and large university libraries. What the approval plan method does not do, however, is make Canadian books easily discernable in the system. Most of the wholesalers supplying libraries with print and e-books are US- or Europe/UK-based, and Canadian content represents less than 1 per cent of their offerings. There are no identifying marks for Canadian titles unless a Canadian-specific plan is developed as part of the overall approval plan program. But even if universities have a policy of purchasing Canadian materials, this does not mean that a particular print or e-book title will be identified, especially if the approval plan vendor is not profiling the Canadian publisher or all books from that Canadian publisher. Increasingly, the tendency to purchase collections in a given field often means that individual titles may be lost or not added to a particular collection.

A major research library may specify in its approval plan that it wishes to purchase a book by an individual who did a PhD at its own university, or who teaches there, or a work that concerns the city where the library is situated. However, such works may not be seen by the collections librarian if other criteria in the approval plan inadvertently exclude them; for example, materials based on dissertations are often excluded. A case in point:

A book by a scholar who obtained her doctorate at one Canadian university was published in 2008 by that university's press. The work was based on her thesis, and the subject matter was listed by the publisher as being "History: Canada: Quebec: Pre-Confederation Canada." Nevertheless, the book escaped purchase by the university library until 2010, when the author, who was teaching courses at the university that year, complained to the library that her book, published by the press across the street on campus, was not among its holdings.

A changed environment in libraries

In the course of discussion at our think tank sessions; in email and personal conversations with university librarians, scholarly journal publishers, and university press publishers; and in our research of this area, it became clear that the environment at university and college libraries has changed dramatically in recent years. This new environment arises from a number of factors related to acquisition practices: the favouring of digital content over print; the emergence of alternative scholarly publishing models, primarily open access models; the purchasing of books through approval plans with primarily US-based vendors, as mentioned above; the decline of the Canadian dollar against the currencies of those countries where most scholarly books and journals are published; the monopoly-like dominance of a few large commercial publishers in academic publishing; the Big Journal deal for journals, which has seriously eroded library book budgets; the lower circulation of print materials; and the reallocation of space in libraries from stack use to study use. All of these factors are having an impact on the presence of Canadian print materials in university libraries. Most significant is the shift to purchasing electronic rather than print versions. Only a few of the major university libraries buy both hard copy and e-book editions – which they may do through different vendors/wholesalers.

University libraries' expenditures on overall and Canadian content

Detailed data on Canadian content in Canadian university libraries is scant, though a picture does emerge from the few available studies and from anecdotal evidence provided by knowledgeable experts at our think tank sessions.

The Canadian Association of Research Libraries (CARL), which represents 29 large Canadian university libraries and two federal government libraries, published data on overall acquisitions in their 2017 report, *Expenditures, Establishments and Collections, Emerging Trends, Use, Facilities and Services*. For 2015–16, library materials spending totalled \$311,105,744, with a one-time resources purchase – mostly books – of \$57,994,622.

(Ongoing resource purchases, including multi-year subscriptions for journals, and library support make up the greater portion of the total.) There is no information available on how much of this is for Canadian print or e-book materials.

The same report shows that library materials spending represented 38.8 per cent of total library expenditures. Further, it compared material and library expenditures to total university expenditures: The national average for total materials expenditure was \$11,474,698 out of total university operating expenditures of \$605,242,000. Materials expenditures represented an average of 1.9 per cent of the total university expenditures, and university libraries represented 4.38 per cent of total university expenditures. Between 2012 and 2016, there were changes in these ratios, including a national average percentage change in university expenditures of 12.07 per cent and a percentage change in materials expenditures of 15.1 per cent. While it appears that collection spending increased during this time, it was almost certainly allocated to the acquisition of electronic journal subscriptions.

Canadian university libraries spending power

Canadian university library spending (expressed in US dollars) in a North American context can be extrapolated from *The Chronicle of Higher Education, Spending by University Research Libraries, 2012–13*, a 2014 study of the top 55 US and Canadian libraries. It includes nine Canadian institutions. The University of Toronto ranked third, after Harvard and Yale, with materials spending of US\$42,824,113 and total library spending of US\$77,464,495, for a ratio of 55.28 per cent. The ratio of materials spending to total library spending for the remaining eight institutions ranged from 54.91 per cent (University of Saskatchewan) to 36.23 per cent (Université de Montréal). The total expenditure on material acquisitions for these nine Canadian university libraries in 2012–13 was US\$155,398,089.

eBOUND Canada, a not-for-profit organization whose aim is advancing the digital engagement of Canadian publishers, addressed university library funding and overall budgets in its report *EBook Collection Practices: A Report to the Canadian Publishing Community on Trends and Issues in Canada's Public, University, and College Libraries*. Citing the Canadian Association of University Business Officers' (CAUBO) 2012–2013 *Financial Information of Universities and Colleges* report, it found that the national average for library funding in 2012 was less than seven per cent of the Canadian university total for operating expenditures.

According to the 2011/12 Canadian Association of Research Libraries (CARL) statistics, of the money allocated for books and journals in Canada's research libraries, over 70 per cent was spent on journals and less than 30 per cent on books. Electronic journal expenditures accounted for 85 per cent of the journal expenditures compared to only 28 per cent of the book expenditures for electronic books. Carleton University library, for example, reported that the portion of the collections budget allocated to electronic resources has steadily increased from 54 per cent in 2005–2006 to over 70 per cent in 2012–2013. In comparison, the print monograph budget declined 32 per cent between 2009 and 2012. The trend that Carleton's numbers reflect is typical.

This trend has accelerated further in the past few years, with acquisitions of electronic journals at a handful of universities estimated at close to 80 per cent of collections budgets. This leaves very little room for book acquisitions, whether in print or electronic formats.¹⁵

Canadian e-book collections in Canadian university libraries

Important initiatives have been undertaken to ensure that Canadian books are available in the digital collections of university libraries. The idea began in the infancy of e-books when, in 2005 and 2006, McGill-Queen's University Press and UBC Press, through Gibson Library Services, were able to sell a few hundred titles in electronic format to the libraries of the University of Alberta and the University of Calgary with the aid of funding from the Alberta government.

In 2008, thanks to a grant from the Canadian Foundation for Innovation (CFI) and matching funds from anglophone and francophone university libraries and member presses from the Association of Canadian University Presses (ACUP), some members of the Association of Canadian Publishers (ACP) worked in conjunction with Gibson Library Services to negotiate through the Canadian Research Knowledge Network (CRKN) an \$8 million purchase of Canadian-authored e-books to be housed in all 78 university libraries in Canada. The titles included all frontlist and backlist titles available at that time in e-book format from Canadian university presses plus some titles from Canadian trade publishers. The sale was part of the much larger CFI Digital Content Infrastructure for the Human and Social Sciences (DCI) Project, which was intended for the purchase of digital products, including journals.

Following on the success of this innovative agreement, members of ACUP and the participating trade publishers met in 2012 with representatives from all regional Canadian university libraries and CRKN to carry the initiative forward. The objective was to place digital copies of all relevant books published in Canada and authored by Canadians in all university libraries, including titles published after the initial 2006–08 collection. In February 2013, it was decided to begin with a pilot sale of peer-reviewed books from ACUP to the larger university library members of the Ontario Council of University Libraries (OCUL) and to host the e-books on OCUL's Scholars Portal platform. The content would come from the 15 members of ACUP.

A price formula was devised, based on full-time enrolment numbers at each university (FTEs), for frontlist titles, immediate backlist, and backlist titles going back to 2006. Three alternate-use models were developed to balance the librarians' desire to provide as much unrestricted reading and access as possible with the publishers' concerns about potential loss of revenue, primarily with course adoption books where multiple users could simultaneously read or download or print selected sections. Each press set the user terms on each title as either single-user (SUPO), single-user view only (SUPO Plus), or multi-user (MUPO). In addition, already existing open access books were included as part of the collection. It was agreed by the libraries and publishers that each year these settings would be reviewed for the purpose of moving more SUPO and SUPO Plus titles to MUPO.

Soon after the signing with the original 10 OCUL university libraries, six smaller OCUL institutions (fewer than 10,000 student FTEs) also signed on. The agreement covered a range of French- and English-language works published between 2006 and 2013 and was ongoing for newly published titles. After the pilot sale, the plan was to extend the model nationally to all university libraries for university press books and, ultimately, to include books from trade houses as had occurred in the initial 2008 CRKN sale.

The 16 libraries celebrated the value of the then 6,000-title collection of frontlist, midlist, and backlist e-books, a resource that made available to their students, faculty, and staff a significant body of work on Canadian topics in the social sciences and humanities. Shortly afterwards, OCUL documented that an astounding “24% of the most-used titles were from the ACUP/APUC collection. This is impressive given the ACUP/APUC collection comprises only around 2% of the entire list of commercial titles available on the platform.”¹⁶ It is also evidence that when Canadian content is available in Canadian libraries, it is widely accessed and desired over non-Canadian content.

Extending the e-book initiative nationally

To carry the plan forward nationally, it was decided to involve both CRKN and eBOUND Canada. In 2015, CRKN was able to extend the agreement nationally, building on the work of OCUL and ACUP and offering perpetual ownership and local hosting rights on OCUL's Scholars Portal platform. The new Canadian University Press EBook License agreement was signed with some CRKN libraries for Canadian scholarly monographs published by members of ACUP. But the expected uptake did not occur, and fewer libraries were prepared to commit, especially from Quebec and the Atlantic and Western provinces. There are now 25 universities participating in the agreement, with only nine institutions outside of Ontario participating.

Of the new institutions joining at the CRKN agreement level, only a few opted to add the available backlist titles to their digital book collections. The reasons for this and for the generally lower uptake were many and varied. Among them: the offer went to libraries at the end of their budget years, and their resources had already been spent. Others wanted to buy the list, but only if all titles were in MUPO. Some libraries claimed to have bought the list, or part of it, through collections from other non-Canadian vendors, so they believed there would be duplication in their purchasing. Perhaps the most significant reason had to do with the value of the Canadian dollar. Once higher than its US counterpart and strong against European currencies, the Canadian dollar fell precipitously that year. Given that Canadian university libraries typically have long-term agreements with vendors and purchase over 99 per cent of their materials from foreign sources in foreign currencies, there was little left for the purchase of Canadian titles – no matter how desirable the collection.

January 1, 2017, marked the first renewal of the licence for e-books between CRKN, eBOUND, and ACUP. The licence, which includes content from the 17 ACUP member presses, provides access to a comprehensive collection of more than 10,000 titles while also offering libraries the flexibility to choose among several collections arranged by publication year. The second phase of the licence covers content from 2017 through 2019. In theory, libraries value Canadian content and wish to support Canadian scholarly production. However, in practice, to date the list of universities participating in the licence has not grown, nor has the subsequent plan to include suitable books from trade houses become a reality.

This experience illustrates the complexity involved in the acquisition of Canadian books by university libraries, the commitment of many universities to this objective nonetheless, and the limitations of the access by academics and students to Canadian material, depending on their university.

Broadening access to university press titles

What each university library paid for the collection of e-books offered by this initiative was initially based on three different discounts that related to copyright years for frontlist, recent backlist, and older backlist titles. When universities came on board later, the model was modified so that full-time enrolment (FTEs) also affected pricing. The result was that a small-enrolment university, like Université Sainte-Anne, would receive an extraordinary discount of 98 per cent for each frontlist title, whereas a large university such as Toronto, UBC, or McGill would get a 10 per cent discount. In effect, the approach was the philosophy of the big deal: If all the university libraries participate, publishers can and will offer big discounts.

Competing demands for funds, with no clear policy priorities in place, stand as a barrier to the robust presence of Canadian books in Canadian university library collections. Our anglophone and francophone university presses publish some 700 titles per year. Most are by Canadian authors writing on Canadian themes in the humanities and social sciences. According to the financial model established between ACUP and eBOUND with CRKN, placing all 700 frontlist titles in the digital collections of every university library in Canada would cost \$1–3 million annually, depending on the pricing and user access terms negotiated. The pricing offered by university presses in 2018 would put the figure at just over \$1 million.

Those same 700 peer-reviewed titles could be added to the collections of every public library system in this country for about the same amount, again depending on the outcome of negotiations. Since these works are written primarily by scholars in the social sciences and humanities whose research is most likely funded by the Social Sciences and Humanities Research Council (SSHRC), their university press publishers have proposed that, as part of its mandate to encourage broader research communication, SSHRC create a new strategic fund to subsidize the dissemination of the research found in these books among users of all Canadian university and public libraries. (This new fund would be in addition to the funding it provides to the Awards to Scholarly Publication Program, which is administered by the Humanities and Social Science Federation of Canada and subsidizes the editorial and production costs of about 200 new titles annually.)

Such a program would result in access to all Canadian university press frontlist e-books for some two million users of university libraries and all Canadian public library users. Implementing this proposal would guarantee that those e-books will have long-term presence and preservation on two different digital platforms: Scholars Portal for university libraries and Overdrive, or another e-book platform, for public libraries.

As noted, university libraries tend to buy subjects or specific publishers' lists. A large-scale multinational university press publisher like Oxford or Cambridge can afford to and does offer Canadian university libraries deep price discounts on their titles because Canada is not their primary market. For Canadian-published books, however, Canada is the primary market, and so university press discounts to Canadian university libraries remain relatively modest in order to help recoup the costs of originating these titles. Support from a public agency like SSHRC to finance the acquisition of Canadian e-books by university and public libraries would help level the playing field with foreign publishers and promote and foster the discoverability of Canadian books in those libraries.

Of course, university libraries purchase appropriate books from independent Canadian publishers as well as works from university presses. Both types of publishers experience the same barriers, which leads to the proposal that trade and academic titles suitable for university libraries be given the same consideration as titles from university presses. For those works, a title-by-title purchasing model might be best. The full realization of the national plan initiated by ACUP and eBOUND with CRKN would encompass all these Canadian-authored books. This measure would significantly enhance the presence of Canadian books in the Canadian university environment.

[A made-in-Canada distribution model for university press titles](#)

University libraries express a strong preference to purchase e-books rather than print versions, as we know. Print acquisition still dominates, but print purchases by university libraries have recently decreased by 15 per cent, while e-book purchases have increased by the same amount. The eBOUND Canada survey of university libraries undertaken in 2015 reported that “at least half of the respondents planned to increase budgets for e-books that fiscal year.”¹⁷ The survey also noted that there was “no single dominant ebook aggregator or collection model.”¹⁸

University presses and Canadian trade and academic publishers currently distribute their e-books through aggregators and their print books through print distributors to ensure

that Canadian books are available to university libraries and bookstores around the world. Canadian university press books are available through US and UK/Europe print wholesalers and on aggregator platforms, including DesLibris (the only Canadian aggregator), EBSCO, ProQuest, JSTOR, and Project Muse. Ironically, these international distributors and aggregators are currently the main vehicles by which Canadian books reach Canadian universities. But, as noted earlier, this situation is highly problematic. Canadian-authored and published books that meet the needs and interests of Canadian university libraries are often hidden in a flood of content from other countries and are too often missed in the selection process.

The need is for a made-in-Canada distribution model that will allow university libraries to access their books, digital and print, from Canadian sources. Canadian publishers are well placed to promote and market their books in both print and electronic formats to already supportive Canadian university librarians who have established networks based on national, regional, and shared interests. A history of successful collaboration between publishers and university librarians to achieve common goals provides a strong foundation. Here is an opportunity to use the experience of these efforts and to put in place a workable structure and ongoing funding.

University library catalogue software

Canadian university libraries use a variety of collection management software tools that rely on MARC records and other publisher and vendor supplied metadata to index and identify the materials in a university library catalogue. Even with the sophistication of these systems, the ability to identify and search for Canadian-authored books is only as good as the detail of the metadata provided with each book record entered into the system. There are Canadian subject headings but no specific Canadian content metadata tag applied to each Canadian item.

Making Canadian authorship difficult to determine or invisible to users works against the purpose of catalogues to provide easy access to relevant content. And when Canadian content occupies a very small share of the overall collection, the difficulties are compounded. Similar to the many initiatives suggested in this report to move to a digital infrastructure that supports the discovery of and access to Canadian books, there is an opportunity and need for this functionality. It was added to Onix standards as a result of an initiative by Canadian publishers. It is suggested that MARC record specifications also incorporate it.

Recommendations

The recommendations we set out here are aimed at solidifying the role of university libraries in offering Canadians access to a wide range of Canadian-authored books and at allowing university libraries to support Canadian authors and their work. The successful adoption of these proposals would mean that every Canadian-authored book that is appropriate for purchase by a Canadian university library will be available in every university library in the country. Our proposals are:

35. University libraries should adopt as one component of their collection policy that they will collect every scholarly book and appropriate trade book authored by a Canadian in every field of study at their university.
36. University libraries should specify in their approval plans to e-vendors and print wholesalers that the acquisition of a title by a Canadian author is a priority.
37. University libraries should set aside a designated portion of their acquisition budgets for Canadian-authored and published books.
38. The Canadian Foundation for Innovation should have a new round of funding to ensure that university libraries that have not bought backlist titles from participating Canadian university presses since the 2008 initiative are able to purchase backlist titles not in their collections.
39. The Social Sciences and Humanities Research Council should establish a new strategic program in its research communication division. Funded at \$1–3 million annually, this program would enable the approximately 700 frontlist and peer-reviewed Canadian books (not including books designated by publishers as course adoption books) published by Canadian university presses to be digitally available in every university library in Canada. SSHRC would review university press programs every three years, as it does for journals, and make the purchase directly from the publishers.
40. The Social Sciences and Humanities Research Council should establish a parallel strategic program in partnership with all public library systems to ensure the widest possible access to books published by university presses in digital form by public library users.

41. The Social Science Federation of Canada should increase the funding budget of the Awards to Scholarly Publishing Program to ensure that all books that pass peer review and are adjudged by the ASPP in the “good” category are supported. To enable this, the number of titles supported should be increased to 240 titles annually, and the average grant should be increased to \$12,000 per title to enable proper and affordable dissemination of scholarly published books by Canadian authors.
42. Those universities not included in the current agreement between ACUP, eBOUND Canada, and CRKN should participate in the collective purchase of university press e-books for frontlist as well as backlist title purchases, so that professors and students in all Canadian universities have access to the same books. This should be done urgently, while the current agreement is in effect.
43. Trade publishers of titles suitable for university libraries and eBOUND Canada, together with CRKN and university libraries, should develop and implement a parallel initiative under which university libraries acquire appropriate e-books from independent Canadian trade publishers.
44. The Canada Book Fund should include a new component for a program parallel to the SSHRC initiative, as recommended in no. 39 above, to fund the purchase of e-books published by independent Canadian trade and academic publishers appropriate for university libraries on the terms negotiated by the parties specified in the previous recommendation.
45. The titles destined for university libraries should be housed with Scholars Portal and those destined for public libraries with Overdrive or another digital depository.
46. The descriptive metadata used by the publishing industry and the library profession should be enhanced to hold and display a data tag identifying Canadian-authored books. This would facilitate searching for Canadian books and encourage awareness and discovery of Canadian books by university library users. Support where needed for this metadata practices upgrade should be part of an industry-wide initiative of the Canada Book Fund. It should be undertaken in parallel with the initiative recommended above (no. 24), which outlines that publishers ensure new Canadian-authored books by university presses and independent Canadian trade publishers be identified with an industry-wide

provenance label, which publishers, authors, and publisher organizations would promote to enhance the discovery of independently published Canadian-authored books.

47. Canadian university and academic presses should create a seasonal collective electronic catalogue with quality metadata of all their forthcoming titles in English, French, Indigenous languages, and other languages for distribution to university libraries so that joint promotional plans, displays, and author readings can be undertaken with those libraries.

University bookstores

Virtually all Canadian universities have a bookstore, but the mandate for these stores varies greatly from institution to institution. Indeed, there have been major changes in mandate and management over the past three decades.

All university bookstores sell textbooks and course materials prescribed by course instructors. All sell merchandise, beginning with institution-specific clothing and memorabilia but often extending into other categories. Some stock and sell a selection of trade books aimed at appealing to faculty and students for reading that goes beyond required textbooks.

University bookstores have faced a variety of challenges: competition for textbook sales from online booksellers, particularly Amazon, that offer lower prices than campus stores; competition posed by used books, sold informally by students or more formally by specialist used book vendors; digital versions sold to students directly and illegal digital versions found for free on the web; and increasing percentages of students who purchase no texts from any source. As university administrations have become more conscious of their role as managers of commercial real estate – attractive to private sector operators of food services, cafés, and the like – university bookstores have been challenged to operate on a purely commercial basis. They are expected to return commercial space level rents to their universities and to occupy smaller spaces when this will achieve higher per-square-foot sales and a better return for university management. This has led to a shrinking presence for university bookstores on many campuses; as an example, in 2018, the University of Regina bookstore had its floor space reduced by about 50 per cent, while its former remaining space was renovated to accommodate other revenue-generating activities.

Another development is the emergence of a US campus-bookstore operator, Follett, as the manager of many of Canada's university and community college bookstores. Federal cultural policy prohibits foreign takeovers of book retailers in Canada, in parallel to the prohibition on foreign takeovers of independent Canadian book publishers and distributors. But this policy has not prevented Follett from becoming a major player in university and college bookstore operations under management agreements with willing administrations. In June 2018, Follett listed 20 Canadian college bookstores and 11 Canadian university bookstores in six "states" on its website – BC, Alberta, Manitoba, Ontario, New Brunswick, and Nova Scotia. Canada represents only about three per cent of Follett's store count, but we were told that Follett is an active presence in the Canadian market, seeking new management contracts. Canadian bookstore managers are well aware that their university administrators are regularly solicited by Follett, with offers that may include an attractive upfront prepayment of future rent and/or franchise fees.

Follett's Canadian on-site store managers use similar or identical business systems to those used in the US stores. Buying is centralized at the US head office. A telling experience of this arrangement was cited by one of our participants, a Canadian law book publisher who visited a Follett store in a major Canadian university. There he was shown a special display of legal titles (not textbooks) aimed at law school students and professors by the proud store manager. He saw that all the books in the display were American law books with very limited relevance in Canada, given that Canada has its own legal system. The bookstore manager was understandably embarrassed and had not noticed that the books selected for the promotion by head office were unlikely to be successful with the target audience.

Trade books in campus bookstores

Some university bookstores stock virtually nothing but the textbooks and course materials specified by instructors for student purchase. Others grant a small amount of shelf space to a few trade books, often titles written by their faculty members or histories of the institution.

Other university bookstores take a different approach, devoting a sizable percentage of their floor space to a well-curated array of trade books designed to appeal to the reading interests of the community of scholars and students they serve. In this, the university bookstore is operating just as an independent bookstore does, seeking to match its inventory with customer interests and to maximize sales through informed decisions about which

books to stock and promote. A university bookstore with an attractive space and a good location can benefit from an immediate customer base of readers and reach beyond the university or college to the wider population of readers.

Like other independent booksellers, university bookstores were hard hit by the price discounting and retail competition of Amazon and Chapters/Indigo. Sales and margins from trade book sections suffered dramatically, much more so than textbook operations. This generated pressure to reduce trade sections and store space overall, so trade book inventory was replaced with merchandise that promised better per-square-foot sales and higher margins. It also helped open the field for outside management contract bidders.

Another factor hurting trade book sales was the decline in spending on print books by faculty and students. Swapping print for digital formats may have played a role in this, as could a shift in purchasing habits from bricks and mortar stores to online vendors. The result was that lower sales led to cutbacks in trade book display and stock, which led to lower sales and further cutbacks in display and stock. One university bookstore cited in our discussions enjoyed annual trade books sales of \$1.5 million 10 years ago; today, those sales are down by 80 per cent. The bottom line is that there are now far fewer university bookstores with strong trade book sections playing the role of a good independent bookstore in their university community and in the larger community beyond.

The consequence for Canadian-authored trade books is a loss of access to an important reading audience for both fiction and non-fiction. The awareness and the sales generated by the trade sections of university bookstores have not been replaced in the Canadian marketplace.

[A new mandate for university bookstores](#)

Canadian universities recognize and assert their important position in the country's intellectual, educational, and creative life, and they have embraced many innovations in recent years to advance that position. Controversy surrounds some elements of university operation, posing challenges for university boards of governors, presidents, and senior administrators. One of these challenges concerns copyright. Canada's universities and Canada's publishers have been on a collision course in recent years over the 2012 changes to the Copyright Act, specifically over provisions in the Act that have been interpreted by university administrators to allow for multiple copying of copyrighted work drawn from published books (and other sources) without payment to publishers or authors if those copies are for educational use. In the continuing conflict, however, universities and their associa-

tion, Universities Canada, have reiterated their fundamental commitment to supporting and encouraging creative work and the activities of Canadian writers and publishers.

There is an opportunity for Canada’s universities to take an initiative that would underscore this commitment and at the same time enhance the position of their institution in the local community. The opportunity is to establish (or reinforce, if it is in place now) a mandate for their university bookstore to play the role of an independent trade bookstore with a special emphasis on Canadian writers and their books. The trade division of every university bookstore could be developed to serve the leisure reading interests of the university’s staff, faculty, and students as well as the wider local community. These stores could help strengthen the independent bookstore sector that we propose earlier in this report, supported by all the measures recommended for independent bookstores. Our call to action is:

48. Every Canadian university should give its bookstore a mandate to operate a substantial “store within a store,” with a specific emphasis on Canadian-authored books. These stores should be eligible to participate in government measures to support independent bookstores, including accreditation and support for awareness events and activities.

This initiative would be widely welcomed within the universities themselves and in their local communities, for the same reasons that any independent local bookstore is seen as a valuable community resource. It could also help mitigate the current breach between Canadian writers and publishers and universities that was triggered by the copyright conflict. It would also increase the awareness among students and faculty of the wide variety of Canadian books on topics that appeal and are relevant to them. Increased awareness through bookstore displays, events, and social media activities would lead to increased reading – a benefit that is particularly relevant for the current university student population whose leisure reading activities and positive experiences with books are low compared to other age groups.

There are two highly successful examples of this approach in operation in English Canada today. The first is the University of Lethbridge Bookstore, which operates in a community of 90,000 alongside a big box chain bookstore, a Christian bookstore, and several smaller retail outlets. The university bookstore has a sizable trade book section, stages frequent book-related events, supports local authors and local books, and offers a comprehensive selection of children’s books and adult fiction and non-fiction. This “store within a store” operates in conjunction with a café, university merchandise, a textbook operation, and an

e-book/digital division. A visual tour of the store is available online at <http://tours.methodvisual.com/uoflbookstore/>.

The second is the University of Toronto Bookstore, which is located in the former home of the Toronto Reference Library, on the south side of the university campus and easily accessible to the public (though not in a shopping area). Operated as a subsidiary of the University of Toronto Press, which itself is organizationally independent of the University of Toronto, the bookstore has the significant benefit of a beautiful and functionally appropriate heritage building that could not be easily put to any other use. The bookstore offers an impressive stock of trade books across a wide range of subjects, including history (1,154 titles in stock in June 2018), social sciences (2,324 titles), law (305 titles), children's books (836 titles), and a surprisingly short list of 68 titles tagged as being written by U of T faculty. (Perhaps it is not surprising, given the issues noted about digital infrastructure, that the bookstore's website does not identify Canadian-authored titles or permit a search for Canadian books.)

These two examples from vastly different cities and institutions show how university bookstores could re-establish their role as independent trade bookstores on every Canadian university campus while implementing a business model that resembles in many ways the successful independent bookstores discussed earlier. Like them, university stores could and would enhance their relationship with their customers and communities through events and social media outreach.

Digital infrastructure

Canadian university bookstores have been successful at maintaining a trade association, even though independent trade bookstores in English Canada no longer have a national association to represent their interests. The group numbers about 20 independent university bookstore members. This organization has been involved in an initiative to address the shift in course materials from print to digital and have done this in a joint venture with an organization of independent American university bookstores.

The Canadian university bookstore digital infrastructure, like most digital infrastructures used in the book trade, would require significant enhancements to support the discovery and promotion of Canadian-authored titles in the trade “store within a store” environment. Our proposal is:

49. Software used by Canadian university bookstores to support a trade book operation should be eligible for government support for replacement, upgrading, or enhancement that enables greater visibility and capacity to privilege Canadian-authored books.

University bookstore management and reporting structures

As outlined here, university bookstores could play a critical role in enhancing awareness and access by students and faculty to Canadian creative work. Given the impact that current university students will have on Canadian society in the coming decades, and given the openness that characterizes young people as they encounter intellectual and cultural life while at university, it is vital that the world they meet emphasizes Canada and Canadians. Discovering Canadian authors as well as Canadian perspectives, experiences, ideas, and issues should be central in Canadian universities. Good bookstores stocked with well-selected, relevant, interesting, and appealing books contribute greatly to the discovery process. Our recommendations are intended to achieve that result.

A university bookstore that aspires to this role has to be managed by skilled bookstore managers embedded in their community and knowledgeable about the readers and potential readers they serve as well as the books and writers that will interest them. This can be done only by qualified bookstore managers who work for their institutions, are committed to their store's missions, and are able to operate with sufficient autonomy. Our call to action is:

50. Canadian universities should retain (and where necessary, regain) management and control of their bookstores and give bookstore managers a role and level of responsibility parallel to that of an independent bookstore owner/manager to achieve the multiple mandates of their store.

A corollary of this proposal is that the appropriate reporting structure for a university bookstore is to administrators whose responsibility is educational and cultural, not commercial. An administrative structure in which the university bookstore is a component of a facilities management operation, with the goal of maximizing university revenues from real estate or commercial operations such as franchised food and café operations, is not appropriate for a community-oriented bookstore. The structures of individual institutions vary, but it is imperative to establish a reporting structure that recognizes and rewards the bookstore's achievement in terms of a cultural and educational mission. A university bookstore is akin to a university art gallery, theatre, or library. Our recommendation is:

51. University bookstores should be placed in management structures that are devoted to their university’s cultural and educational missions.

Community college bookstores

While our recommendations in this section have so far addressed universities, we are very conscious of the growing presence of community colleges across Canada. These institutions also have bookstores, though their missions tend to be comparatively limited. It may be the more focused mandates of community colleges that have led their senior administrations to place fewer expectations on campus bookstore operations.

Nevertheless, the potential exists for community colleges, as much as for universities, to serve the cultural and intellectual interests of their students and faculty. Innovative community college presidents, particularly in smaller communities not served by a university, have an opportunity to expand their modest college bookstore by giving them the same mandate to operate a “store within a store” modelled after a trade bookstore. Our proposal is:

52. Community colleges should serve their students, faculty, and communities by extending the mandate of their campus bookstore to operate a “store within a store” trade bookstore, following the practices recommended for all Canadian university and college bookstores.

University course content: texts and coursepacks

Our researcher was able to find little information on the extent of Canadian content in university courses, and the only data available on textbook sales in Canadian universities comes from US sources. Canadian university bookstores do not provide their textbook sales information to BookNet’s SalesData service. University library collection and circulation information might offer some clues about the status of Canadian-authored books, scholarly articles, and other material in the reading of students, but we were unable to find any such data.

The articles published by Canadian scholars in Canadian learned journals and in journals based elsewhere in the world are widely used as course readings and course materials in Canadian universities. Journal publishers are able to rely on indexers for information

about use and readership of the articles they publish, which in turn is frequently used by scholars when reporting on their research and writing for tenure or promotion purposes. There is currently no similar measure of the readership of scholarly books, or portions of those books, and we were told that authorship of a scholarly book, published after peer review, is often discounted or ignored in tenure and promotion consideration. More important for our purposes, we are left with little reliable intelligence about Canadian content in university course materials.

The future of learned journal publishing in Canada is under close examination at present. Funding bodies are pressing for open access to journal articles and offering supplementary funding to replace diminished subscription revenues, while editors and publishers are weighing the options of losing this significant revenue stream and increasing their dependence on operating grants or fees for article publication from scholarly authors. Ensuring that Canadian scholars have Canadian peer-reviewed journals that will publish their work is imperative for scholarship that focuses on topics of mainly Canadian interest. The writing and publication of those articles is essential if Canadian university students are to learn about their country.

The use of Canadian-authored books in university courses is also changing dramatically. Textbooks have been and remain an important resource for course reading material in many disciplines, but until recently, many course instructors made scholarly and academic books (instead of or, less frequently, alongside textbooks) required reading in their courses. This was a significant source of readership and revenues for university presses and academic publishers. Over the past 20 or 30 years, an alternative emerged in the form of coursepacks, which are collections of materials, including scholarly articles and chapters drawn from scholarly and academic books, selected for their specific relevance by the course instructor. These coursepacks were produced by photocopying the selections and binding them into a single printed volume. Once a course instructor located and selected the individual items, the onerous task of locating copyright holders and negotiating and paying the required permission fees to make the copies resulted in coursepacks being administratively complex.

This awkward situation was partially resolved with the creation of Access Copyright, the copyright collective organized by publishers of books, magazines, and newspapers along with authors and writers. Access Copyright set up a process that simplified the coursepack process and provided certainty regarding copyright, with reporting and payment at a reasonable per page rate. Universities worked with this, and publishers and authors benefited

from payment for use. Publishers and authors received the funds paid by the universities, minus a distribution fee for Access Copyright's services. The total payments from this tariff were substantial, reaching \$30 million annually.

The division of these funds among publishers and authors was complex and not entirely transparent. A portion was based on a sampling of copying and on the number of titles offered by publishers for potential copying, i.e., their repertoire. For Canadian publishers of scholarly and academic books, the revenues earned from this arrangement were significant. For multinational firms with enormous repertoires of Canadian- and foreign-authored titles, the revenues earned were substantial, although there is no data available on specific amounts paid out to publisher categories or to individual publishing houses.

Access Copyright proposed a different approach for universities that relied on a substantially larger per-student tariff, coupled with permission to use up to 10 per cent of any book in the repertoire for coursepacks or other uses. In the context of a broader discussion about the value of open access, this proposal provoked much resistance from the university community. Universities declined to pay the tariff, and amendments made to the Copyright Act in 2012 – extending provisions that allowed for “fair dealing” of copyrighted material for educational use – were interpreted by Universities Canada and virtually all universities as allowing for use of up to 10 per cent of books without payment.

Revenues from coursepacks to Canadian publishers and authors largely dried up. As described earlier, the universities' interpretation of the Act is highly controversial, pitting advocates of free use of copyrighted material and open access to scholarly work against writers and publishers. These conflicts were very much in evidence in the hearings of the House of Commons Industry Committee on the review of the Copyright Act, which were held across Canada in May 2018.

Enabling the free use of chapters of Canadian-authored books for university courses and in coursepacks could, in theory at least, increase the use of this content. It could lead to the substitution of Canadian scholarship for high-priced textbooks written by Canadian or non-Canadian authors. We found no research that tracked shifts in course material related to pricing.

The organization that initiated this think tank project and report, Canadian Publishers Hosted Software Solutions, has been active in this area for the past three years. Its purpose is to create a digital platform where the individual chapters from scholarly and academic books by Canadian authors in the humanities and social sciences can be discovered by

course instructors, reviewed and read online, and selected for inclusion in a coursepack collection that can then be delivered to the instructor's university bookstore in print or digital format or both. The individual chapters are priced at an average of 10 cents per page per copy, so a coursepack of 300 pages drawn from a variety of different authors and books would be priced at \$30. Printing a hard copy, if a print version is desired, would add another \$6 or \$7 to the cost. A university bookstore ordering the coursepack would add its normal textbook markup, resulting in a volume selling to students for about \$50. This compares very favourably to the current prices of university textbooks, yet it allows publishers and authors to be paid a reasonable price for the use of chapters from their books.

The platform went live in spring 2018 (at www.canadiancoursepacks.ca) with about 3,000 individual chapters, tagged with subject headings to accelerate the process of discovering and reviewing relevant content for course use. An additional feature of the platform is that the discovery-review-selection-production process is simple for both course instructors and university bookstores. There is no need to contact and negotiate permissions for each chapter or arrange licences for each chapter from Access Copyright. Many Canadian publishers of scholarly and academic books have opted in and are in the process of preparing the subject tags that have to be applied to individual book chapters in order to load books onto the platform. The objective is to have 1,000 books, representing the 10,000 chapters by the Canadian authors most suitable for course use in the humanities and social sciences, available by May 2019.

In 2018–19, the platform is to be expanded to include categories of Canadian creative writing, namely poetry, short stories, and plays by Canadian authors. Once this expansion is undertaken, the platform will offer course instructors in English literature and other subjects a simple way to create an anthology of Canadian creative works suitable for their specific teaching needs, in a print or digital form, at a reasonable cost to their students. Here, too, the publishers and authors will be fairly compensated for use of their work.

This initiative represents an innovation in digital infrastructure, since the organization, working with a web developer, had to create the software that would support the project. It requires collaboration among publishers and a supportive policy environment. One determinant of the impact and success of this initiative will be finding a solution to the vexing question of who should pay for the work of Canadian creators made available through this platform. At the time of writing, the search was on for an approach that would be acceptable to all the parties involved: university students; university administrations; governments, particularly the federal government through its responsibility for copyright; publishers; and authors.

With a resolution of the issue of who will pay, the coursepack platform has the potential to substantially increase the use of Canadian-authored works in university courses. It can fill a gap in the knowledge bank of course instructors, who have difficulty keeping on top of the work of Canadian scholars in their field. Without bookstores that stock and display all the new books from Canadian university presses and academic publishers, without reviewing journals and publications that promptly and reliably cover the latest publications, and without access to the full range of just-released titles at the annual gathering of scholars (the Congress of Learned Societies) due to the absence of many important publishers, academics are liable to miss relevant new work. The fallback is to use well-promoted work from scholars in other countries.

The design of the coursepack platform, with widespread participation by Canadian publishers, will enable scholars to locate work otherwise unknown to them. The platform will be able to communicate information and news about relevant books to users through display, email, and social media. This non-profit project's sponsoring publishers see the platform as an example of a digital infrastructure initiative that can proactively address the decline in awareness and readership of Canadian-authored books.

In conclusion

As public institutions with cultural, research, scholarly, and educational missions, universities and colleges have the potential to play a major role in enhancing the discovery and reading of Canadian-authored books. This is first expressed in the degree to which Canadian material is incorporated into the courses at those institutions. Sadly, there is very little reliable first-hand information available on this topic. Canadians expect that Canadian students are learning about Canada and Canadian experience in their education. Whether this is happening is not clear. Where there is evidence, in the collections offered to students and scholars by university libraries, on the shelves of university bookstores, and in the textbooks and coursepacks used for teaching, there are clear opportunities for increasing access, for improving the discovery and use of Canadian books, and for enlarging the readership of Canadian material.

Like public library systems, universities and colleges could become champions of Canadian creative work. They could undertake high-visibility initiatives to offer their communities appealing, attractive university bookstores serving all kinds of readers, not just students and faculty. They could make their libraries centres of excellence in their collections and in

their promotion of Canadian books and journals available for reference and reading. They could encourage their faculty to increase their use of Canadian works in course materials. And they could participate in finding a middle way to ensure that Canadian creators – publishers and writers – are compensated fairly when their work is used in universities.

We believe that there would be broad, enthusiastic support for these initiatives from governments, from university board members, from alumni, from students, from faculty, and from the general public. All would see such actions as examples of universities and colleges doing more of what they should be doing as key public institutions in Canadian society.

CBC Radio and CBC Digital

Introduction

How awareness of books is generated has been investigated by several major studies of Canadian book readers, as has been described. Some data is available on sources of awareness for Canadian books specifically, but most of the research deals with all books. Usually book readers report that they are influenced by multiple sources: word of mouth recommendations, social media sharing, author appearances on radio and TV, coverage of books in newspapers and magazines, encountering a book in a bookstore or library. Awareness and interest in a book or an author is, of course, cumulative.

Earlier in this report, we made the distinction between first-encounter awareness and second, subsequent, reinforcing awareness. We believe that further research on awareness would find CBC Radio to be a particularly important source of first-encounter awareness for Canadian-authored books. The long-standing Massey Lectures series on CBC Radio's *Ideas* program is an excellent example of this role. The Masseys demonstrate the potential of CBC Radio to generate first-encounter awareness and readership of books by prominent thinkers and scholars on subjects significant to Canadian public life. This potential was substantially enhanced in 2002, when the Massey Lectures were issued as regular non-fiction trade books by an independent Canadian publisher. The series also went on tour that year, to record the broadcast lectures, offering personal contact between the lecturer/author and audiences just as the book version arrived in bookstores. Massey Lectures titles have an impressive sales history – between 5,000 and 25,000 copies, on occasion reaching 50,000 copies – which earns them a ranking on Canadian bestseller lists almost every year.

CBC Radio also plays an important role in second-encounter awareness. For example, interviews with the shortlisted authors for the Giller on *As It Happens* allow many in the CBC's audience who may have seen the Giller list to hear the authors discuss their work.

These are just two examples of many that drew our attention to Canada’s public broadcaster as a vehicle for increasing the awareness of Canadian authors and their books. Here, a number of readily identifiable strategic initiatives could have a significant positive impact.

CBC Radio and CBC Digital as important awareness channels

There are several compelling reasons why CBC Radio and CBC Digital offer important and achievable avenues for significantly higher awareness of Canadian books and authors across English Canada.

Audience demographics

Demographic data on CBC Radio listeners and Canadian book readers shows that both audiences have similar characteristics in terms of gender, age, and education. Radio audiences are good prospects for programming content about Canadian books and authors. In turn, book readers are good prospects for radio program listenership. This is borne out by reader consumer surveys: a recent study of book buyers in Atlantic Canada found that almost half (48 per cent) listen to CBC Radio at least once a week; 12 per cent listen daily. The average of these listeners tune in to CBC Radio 4.2 days per week.¹⁹

CBC Radio’s highest audience ratings across English Canada are for local morning shows, followed by local noon and afternoon shows. The major network shows (*The Current*, *Q*, *Sunday Edition*, *Day Six*, and others) retain audience from these local shows in all regions and reach substantial numbers of book readers daily. Though not always recognized as such by the Canadian book trade, CBC Radio is now the most powerful mainstream media outlet covering authors and books. Other media considered influential, like the *Globe and Mail*, reach only a fraction of the audience of CBC Radio and offer increasingly limited coverage of books and authors.

CBC Digital

CBC has a strong digital presence, and the organization now seeks to think “digital first” in its activities. Offering its radio and television content in a variety of digital formats, and creating digital-only content, broadens CBC’s reach and offers the prospect of attracting wider audiences among younger Canadians. This digital priority gives CBC even greater potential for generating awareness of Canadian books and authors.

Proven success

CBC Radio has proven its effectiveness in creating audiences for authors and readership for books. The role that CBC Radio played from the 1950s to the 1970s in creating a market for the young novelists and poets then emerging on the Canadian literary scene is well documented. Alice Munro, Irving Layton, Leonard Cohen, Mordecai Richler, Margaret Atwood, Margaret Laurence, and Al Purdy are among the talents given early exposure at the CBC. When these writers published books, there were readers eager to buy and read them. Writers also benefitted from CBC Radio commissions or purchase of their works for performance on air.

Today, CBC Radio's capacity to create awareness and generate readership of Canadian-authored books is no less critical. The Massey Lectures is one illustration; the Canada Reads initiative is another. At the local and regional level, publishers and authors report that author appearances and book-related programming have a powerful impact on sales of local and regional titles. Their experience reflects the large audience share of book readers captured by local morning, noon, and afternoon shows, and they demonstrate the positive link between awareness, purchase, and reading.

Quality content opportunities

The enormous variety of Canadian books published every season offers a trove of rich subject matter and knowledgeable personalities. Authors are located in every part of the country, and they are diverse in every dimension: gender, age, social class, race, occupation, and interests. The fact that a publisher has worked with a Canadian author to create a book that can stand up in the marketplace alongside thousands of others means that the author and the work are likely to interest book readers – and by extension CBC Radio listeners.

Publishers' experiences across English Canada are that CBC Radio producers and programmers are generally aware of and responsive to the potential of Canadian authors, especially at the local and regional level. However, production staff at national radio shows seem less aware of the full range of this programming resource, particularly from authors and publishing houses located outside Toronto. Inevitably, national radio shows produced in Toronto are embedded in a competitive media environment, vying for attention with US and other international media. Toronto-based staff are more likely to be aware of and attracted to easily accessed content coming from New York rather than content from New Brunswick.

Mission

A final incentive relates to the mission of the CBC, one that aligns closely with the mission of independent Canadian publishers. Both have the goal of giving Canadian audiences access to Canadian cultural and artistic expression, and both are supported in this by major public investments from the federal government. (As noted, most independent publishers also receive funding from provincial governments.) Both further the goals of government cultural policy: They assist in the creation and production of Canadian cultural work; they make that work known and available to Canadian audiences; and they reach significant audience numbers in their respective media.

Book publishers and CBC producers make myriad decisions about how to use the resources they are given, along with the resources they earn, to carry out their cultural missions. Choices are made constantly as to what creative works will be offered to audiences. Both seek to promote and prioritize high-quality and interesting Canadian works in a market where Canadian consumers have ready access to foreign works of all kinds. Both have to compete with the cultural products of the rest of the world.

Given these shared circumstances, we believe there is a clear need and opportunity for Canadian publishers and CBC Radio/CBC Digital to work more closely together. For Canadian publishers, the opportunity is to achieve much greater awareness of Canadian books and authors. For CBC Radio/CBC Digital, the opportunity is to identify and gain access to a wider range of content that will interest and appeal to the audiences they are seeking.

In terms of public policy objectives, the synergies are compelling. Closer collaboration between publishers and CBC Radio/CBC Digital around Canadian books and authors will allow both to better serve the goals of federal and provincial cultural policies.

It is worth considering, too, that CBC Radio, in both English- and French-language Canada, is an effective monopoly, as it is the only national radio network system in the country. Having a monopoly in a key medium of communication creates special responsibilities to act in the public interest and to protect and promote the national interest. As one of our broadcasting participants commented, “If CBC isn’t going to do this, then who is?”

CBC programming decision-making

An understanding of how CBC Radio and CBC Digital manage their content issues is essential to realizing the potential for collaboration.

CBC Radio senior management is the decision-maker regarding the structure of the radio schedule, allocating time slots and financial resources to individual programs. Each show has a staff unit headed by an executive producer, who has ultimate responsibility for the content and the success of his or her program. Unit members pitch ideas at program story meetings, where decisions are made. CBC Radio staffers place a high value on their editorial independence and their prerogative to make the final decisions about the content of their shows. (Whereas CBC Television has moved to purchasing independently produced content from Canadian producers, this practice is rare in radio. Terry O'Reilly's show, *Under the Influence*, is the only current example.)

Publishers seeking coverage of specific books and authors try to match their offerings to the content priorities and interests of individual programs, and they make their pitches accordingly. Producers and executive producers evaluate those pitches and decide which to take forward to story meetings.

Presenting books and authors as potential program items is a book publicist's art, but there are some important external factors that affect their success. CBC staff numbers have been steadily shrinking, meaning there are fewer personnel resources devoted to developing and producing program content. The cost in time of evaluating an idea and producing it for a show is always a consideration. All things being equal, the greater the staff time required to develop an idea, the less likely it is to be accepted or even proposed at story meetings. This is a challenge for authors and books, since there is a presumption that a book-related story item will require familiarity with the book's content or the author's body of work. The reading time required to make this judgment and prepare the item may not be justifiable in the mind of the producer or host.

As well as evaluating story ideas in the light of their program's focus and their estimate of audience interest in the idea, CBC producers work within a number of overriding policies and guidelines. A recent example is the broadcaster's diversity policy, which has led to greater diversity among CBC staff and on-air personalities as well as in program content (CBC/Radio Canada, *Inclusion and Diversity, 2015-2018 Plan*). CBC radio producers now pay close attention to gender balance among program guests, and, based on informal

evidence, it seems there is an internal objective for many programs to attain a 50-50 gender balance among all guests. Another governing policy concerns music programming: A directive of the CRTC requires that 50 per cent of the music played on CBC Radio must qualify as Canadian content.

CBC Radio – local and regional

At the core of CBC Radio’s strength and continuing success with audiences is its presence on the ground in so many cities and regions across the country. This is not as evident in southern Ontario, where CBC Toronto serves not only that metropolis but the large populations of Mississauga, Brampton, Oakville, Guelph, Kitchener-Waterloo, Cambridge, Hamilton – the list is long. Elsewhere in Canada, however, cities and regions benefit from a local CBC presence with local daily programming. New Brunswick, for instance, has separate English-language CBC stations in Moncton, Fredericton, and Saint John, each with its own weekday morning show. CBC’s French-language network Radio-Canada also has stations in New Brunswick, an officially bilingual province.

Canadian books and Canadian publishers have a similarly grounded presence in towns and cities across Canada. While Toronto was the centre of most Canadian book publishing in the 1960s and 1970s, today, much more independent publishing takes place outside Toronto than in that city. There never was the same concentration of writers, but the presence of book publishers in so many Canadian communities has contributed to an even greater geographic diversity in authorship. The economics of book publishing have changed sufficiently that local and regional markets will now support books whose primary audience is local and regional. As a result, a large percentage of the Canadian-authored books being published, particularly those from independent publishers, is aimed at a local or regional readership.

This geographic overlap between books and publishers on the one hand and local and regional CBC Radio on the other is already recognized informally by both sides in many communities. If formalized, there is potential for greater benefits to all. For example, if local and regional coverage of authors and books were deepened, CBC Radio and CBC Digital would have access to an invaluable source of fresh and engaging content for national distribution. An existing model is the weekly program *The Story From Here*, which selects high-interest local content for broadcast to a national audience. There is an opportunity on the diversity front as well, since the authors being published for local and regional readers across the country very much reflect the diversity of Canada’s citizens.

CBC News

In Canadians' minds, CBC is first and foremost a news source. Traffic to CBC's very successful website (14 million unique visitors monthly) is news driven, with CBC providing what the audience considers to be trustworthy international, national, and local news. This heightens the importance of what is considered "news" in CBC policy and practice.

Its handling of news about culture and cultural figures has varied over the years. Today, news items about books and authors are relatively rare. Book-related stories are not often considered newsworthy, and there are few reporters identified as cultural reporters in the regions. (It's worth noting that Radio-Canada appears to take a different view of the news value of the cultural sector and is more likely to consider stories about books, authors, and book-related events as newsworthy.)

There is a precedent, however, for treating the cultural sector as a source of news in the same way that sports and business are treated as news sources. The news segment "Arts Report" ran for more than 20 years on the Radio 2 network, and today the cbc.ca/arts site aggregates content relating to the arts across Canada, just as cbc.ca/books aggregates content about books. The model and the opportunity exists for more news coverage of all kinds of Canadian cultural activity.

CBC Books

CBC Books has a small Toronto-based staff and an enormous mandate, with much of its effort directed toward Canadian books and Canadian authors. (At an industry meeting in 2016, a CBC Books staffer reported an internal Canadian content guideline of 70 per cent.) A relatively recent initiative, it has helped amplify the coverage of Canadian-authored books by the CBC, and it offers tremendous potential for future development.

The CBC Books unit aggregates CBC's coverage of books and authors, carries out its own projects (such as Canada Reads and the CBC's literary prizes), and manages the cbc.ca/books portal. It generates editorial content for the portal and assembles content (like its bestseller list) from outside sources. It provides access to existing book-oriented radio shows – Shelagh Rogers's *The Next Chapter* and Eleanor Wachtel's *Writers & Company* – as well as some book and author items from national, regional, and local shows.

CBC podcasts

Podcasts are growing in popularity with digital consumers in Canada, and CBC is moving into podcasting to expand the audiences for its existing programs and to offer new programming exclusively as podcasts.

Podcasting lends itself to independent production, and CBC could emerge as an important distribution channel for Canadian podcast producers. Given the highly segmented nature of the readership for individual books and authors (usually measured in thousands, not the tens or hundreds of thousands expected for radio shows), podcasting has potential as another means of addressing the awareness deficit around Canadian authors and books.

Building collaborative relationships to enhance awareness of Canadian books

The potential for CBC Radio and CBC Digital to play a more powerful role in generating awareness of Canadian authors and books is clear. It is also evident that there is an opportunity for CBC to increase its audience, to intensify its positive engagement with that audience, and to help meet its need for high-interest, high-value content at a low cost.

There are currently ongoing contacts between Canadian publishers, particularly independent publishers, and CBC management and staff. Largely, however, the CBC and Canadian book publishers operate in separate silos, with little interaction beyond pitches by publishers' promotion staff who are seeking coverage for books and authors or involvement in CBC-initiated promotions like Canada Reads. Despite its current programming, the corporation isn't linked to the book world in a way that would best serve its interests. Creating a robust relationship between Canadian publishers and the CBC requires three elements.

Effective working relationships between publishers and CBC

Given the attractions and advantages of programming based on books and authors, publishers report a surprising range of experiences with their local and regional CBC programmers. In the absence of any overall guidelines in this area, book coverage depends on the effectiveness and professionalism of publishers' promotion staff and on the individual values, attitudes, and experiences of CBC personnel with program decision-making

responsibility. We heard anecdotally that some CBC local afternoon shows are eager and enthusiastic about books and authors, while others make it a practice to strictly limit such coverage.

There is a need to develop productive working relationships at all levels in order to tackle the complexities of collaborating successfully. Establishing relationships with the CBC has never been addressed in an organized way by the independent publishing sector, although it is certainly done by individual publishing houses targeting specific programs. Our first call to action is:

53. The leadership of publishing organizations and publishing houses across Canada should contact and build relationships with CBC English-language national and regional management, based on their shared mission to create, produce, and distribute Canadian cultural work to the Canadian public.

There is also a need and an opportunity for national, provincial, and regional publishing organizations to articulate the case to the CBC at all levels for a substantial shift in policies and priorities to achieve greater coverage of Canadian books and authors:

54. Publishing organizations across the country should develop a coordinated plan to inform all levels of the CBC, from senior management to production units, of the strong overlap between CBC Radio's audience and the book reading audience; the wide range of accessible content represented by Canadian books and authors, particularly local and regional books and authors; and the many opportunities for synergies in audience outreach between publishers' marketing and promotional activities and CBC Radio's and CBC Digital's content development.

Content matched to CBC priorities and needs

Effective working relationships will help publishers identify the specific needs of CBC staff so they can efficiently discover new Canadian books and authors. It's accepted that American media are an easily tapped source of usable program content items for CBC producers. There is currently no equally easy-to-use, authoritative, and professional source of information about upcoming and newly released Canadian books.

Even more difficult is sourcing information about authors of recent books that touch on suddenly newsworthy topics. A news story will unexpectedly develop that relates to a subject about which there are one or more Canadian authors with expertise, and they often

have a book in print directly relevant to that story. CBC producers looking for appropriate content are likely to be unaware of the book and the author, and the publisher may not have the resources to provide that information in a timely manner.

Given the energy normally invested by publishers in the promotion of each new book, an aggregating publisher news website offering details of new and upcoming books designed for CBC Radio and CBC Digital staff would involve a relatively small incremental effort. Coverage of already-published yet still topical books could also be provided, an undertaking that would be justified in terms of exposure. With a target readership of only several hundred media personnel, such a dedicated book news site could be highly effective in bridging the information gap between publishers and the CBC and other media professionals. The call to action is:

55. Develop a national English-language book news site and digital publication that targets a professional audience of media producers and news reporters and will highlight new and newsworthy Canadian books and their authors, plus those authors and books relevant to current news events.

A reliable supply of high-quality content

For publishers, this is the easiest requirement of the three identified to achieve greater awareness of Canadian books and authors through CBC Radio and CBC Digital. In every region, and in virtually every location with a local CBC station, publishers are releasing a constant stream of appealing new books by established and emerging authors. A substantial portion of these books is developed and designed for an audience that closely aligns with the target audience of the local and regional CBC stations. The stories behind these books and their creation makes their authors appealing as guests and their subjects desirable as program content.

A potential weakness in this area is an author's lack of skills required for media work. Writers, after all, have primary skill sets that relate to writing, not to media appearances and performance. Many writers have both, but it is unusual for book publishers to ensure that their authors are well prepared for media exposure. Media training is taken for granted for those who have to present themselves and their work via the media – political candidates, corporate executives, non-profit organization representatives, and others. For many publishers, however, formal media training for their authors would be an unfamiliar undertaking.

The factor most likely to encourage it would be the prospect of more media appearances by authors – demand, in this case, would generate supply. This is an opportunity for publisher organizations to offer a valuable service to their members: professional media training for authors. It would also help build the confidence of media producers in the quality of the content offered by authors and their works. The call to action is:

56. Publisher organizations should develop the capacity for and offer professional media training to authors of forthcoming books.

New media for book promotion

In considering the relationship between publishers and all Canadian media – not just the CBC – the current economic state of the media industry is an unavoidable factor. Shrinking revenues and cutbacks in content development budgets are realities in today’s landscape. As noted, the very nature of books makes them seem time costly, especially when the media prospect has to be familiar with a title from start to finish. Publishers do provide promotion-oriented metadata of various kinds to assist producers, editors, and journalists, but the quality of this metadata is as critical as the quality of the book itself.

Because most media are now multi-platform – as is the CBC in repurposing all content from radio and television to digital – there is a need for book promotion information to be multimedia as well. Publishers are comfortable with a wide variety of information and promotion vehicles, both print and digital. The growing emphasis on visual support for content creates an opportunity for innovation in the media materials publishers provide on new books and their authors.

Our proposal is that a short video presentation be made for every new book entering the market – in effect a video press release – in a standardized format specific to book publishers. We visualized a 3- to 4-minute video that would encapsulate the content of the book, provide a short clip of the author discussing the book, and demonstrate the connection the book will make with its intended readership. Using a standard format would enhance its usefulness to media contacts, as would its adaptation to potential media channels. Hard dollar costs associated with this promotion tool would be low. The most significant expense will be the staff time associated with developing creative content that meets the needs of the target media audience.

A brief video presentation has the double benefit of providing easy-to-absorb and time-efficient information about a book together with a sampling of the author’s media skills. It also offers visual content to accompany audio or text. The proposal is:

57. Publishers should develop a standardized short-format video presentation for new Canadian books, which would be included in all promotion packages provided to media contacts.

Regional presence for CBC Books

CBC Books is open to coverage of books written and published outside of Toronto, especially when the intended readership is national. There is an important and low cost opportunity to reuse local and regional book coverage already being produced on other platforms. To capture this content, CBC Books could broaden its staffing to include a unit member based in each region of the country. CBC Books would thereby also increase its capacity to generate book-related content at the regional level and do much more to aggregate and repurpose local and regional content for national audiences on the CBC Books portal. The call to action is:

58. Provincial and regional publisher organizations, working with local and regional CBC management, should seek to have a dedicated CBC Books unit staff member in their province or region, who would be responsible for aggregating book-related content and delivering it to the CBC Books portal and for generating additional content based on regional writing and publishing activities.

Tracking the presence of Canadian books on CBC Radio

CBC Radio offers a substantial amount of coverage relating to books and authors every week on existing local, regional, and national shows. While publishers are most conscious of the coverage offered by book-specific programs, such as *The Next Chapter* and *Writers & Company*, plus the annual Canada Reads broadcasts, these account for only a small portion of all the broadcast items featuring writers and their books. Unfortunately, we are aware of no data tracking service that provides information on the content of CBC Radio programming, and we have no statistics on the breakdown of author and book content between Canadian and international authors.

There is currently a very strong presence of international authors throughout CBC Radio programming. This is often a secondary product of radio coverage of stories initiated by other media. Naturally, international media covering non-Canadian stories mostly rely on experts and commentators who are familiar and local to the media source. Relying on these sources, CBC producers are likely to turn to the same non-Canadian experts and commentators, and in many instances these will be authors. Further, international media coverage of new books and their authors provides story ideas for CBC producers and naturally leads to coverage of those books and authors on CBC programs. These circumstances are contributing to a larger share of non-Canadian books and author coverage across all CBC Radio programming.

CBC Radio programming is produced within the context of the CBC's mandate and with the guidance of policies like the diversity policy and the Canadian content rule for music. Given the importance of CBC's role in generating awareness of books and authors, the broader need for effort in the face of the awareness decline that has been occurring, and the CBC's mission to provide access to Canadian cultural work, there is a powerful case for a similar policy commitment to ensure that Canadian books and authors have a strong presence throughout CBC Radio. Indeed, the measures proposed here, if implemented, could easily lead to a preponderance of Canadian content in CBC Radio's book coverage.

We understand that, generally, executive producers don't welcome standards or criteria that put limits on their creative freedom. We also believe that the best scenario is one where mutual interests – as outlined in this report – inspire all parties to the same resolve. These considerations stand behind all the proposals we are making. Policy makers and CBC management could opt for a collaboration-only approach on this issue. We note, however, that this was not done for other items identified as priorities.

If the need to enhance CBC Radio's role in creating awareness of Canadian books and authors in English Canada is deemed important and urgent, there is a clear way forward. It is expressed in the following call to action:

59. CBC Radio should establish goals for creating awareness of Canadian books and authors as a baseline for every program unit and adopt a standard that 50 per cent of the coverage of books and authors be Canadian in content or authorship.

We accept that there are situations where the standard would not be appropriate for a program with a specific international mandate – *Writers & Company* is a case in point. Simi-

lar issues arose when CBC Radio developed its response to the CRTC-mandated policy of 50 per cent Canadian content for music. Generally, though, a standard of the kind we are suggesting would encourage producers to think of Canadians first for their programming needs. It would also create an incentive for publishers to be far more proactive in providing material to meet the needs of CBC producers.

Programming initiatives

The CBC's schedule and programming priorities undergo regular revision. Shows have a life, and as audiences' interests change, CBC Radio modifies its offerings.

To find inspiration for programs that might influence awareness of Canadian books and authors, we can look first at enterprises beyond the media. One oft-cited phenomenon is the growing popularity of public events featuring authors in communities across Canada. These have evolved from simple readings by poets and novelists to debates, panel discussions, lectures, and conferences. There are multi-session events, including writers' festivals, public library lecture series, university public lectures, author presentations at events like *The Word on the Street*, and charity fundraisers featuring writers in conversation. Many of these are supported directly or indirectly by public funding from federal, provincial, and/or municipal bodies. All are potential sources of interesting, quality content for CBC Radio, CBC Digital, and CBC-distributed podcasts. Because the incremental cost of turning an existing public presentation into radio programming is often modest, these events could be a much more frequently tapped source of programming content than they are currently. Plus, the event and its participants would enjoy a much larger audience through CBC broadcast. The call to action is:

60. Book-related event organizers should consider the potential of every public event for radio programming, digital content, and/or podcasts. Publisher marketing organizations should offer their expertise in how to propose and package public events for distribution through the CBC.

Experienced CBC managers have found that brainstorming is an effective way to develop new program ideas. The current practice is to assemble 100 good ideas, then winnow the list to 12 to be trialled as summer series, and, finally, develop 3 as network shows. This method could be used to develop innovative programming ideas that would strengthen CBC Radio's ability to generate awareness of Canadian authors. The call to action is:

61. Publishing marketing organizations should facilitate sessions involving independent publishers and experienced radio broadcasters to brainstorm programming ideas that would enhance awareness of Canadian authors and books.

Radio programmers have learned to borrow and adapt ideas from public broadcasters around the world. Publishers have a vested interest in identifying program ideas that have proven their effectiveness in raising awareness of authors and books in other countries. Because of the extensive export marketing activities of independent Canadian publishers, the publishing community has contacts in virtually every country who know their national book markets and who are aware of successful promotion vehicles. These sources could be solicited for information about potential models. Of particular interest are ideas that are transferable to multiple channels – radio, digital, and podcasts. This initial information could be the basis for a modest research report identifying appropriate program models to CBC management. The call to action is:

62. Publisher marketing organizations should coordinate information gathering by publishers from their international contacts regarding public broadcasting activities to identify examples of radio program formats not currently used in Canada that have proven their ability to generate interest in and awareness of books and authors.

CBC Books

The content currently offered by the CBC Books digital site is appealingly packaged and designed to encourage readership of Canadian-authored books among a younger audience, in the main those who rely on news sites and social media as their primary source of news. Content initiatives by CBC Books, including lists of recommended titles and the Canada Reads promotion, are having a powerful impact on awareness and reading.²⁰

Current coverage is restricted, however, to a relatively small number of new titles. Information about those titles is likewise limited. The impression is that the bulk of the content on the site is the original work of CBC staffers, presumably members of the CBC Books unit.

Earlier we noted the considerable amount of high-quality content that could be repurposed for the site from existing book coverage on national, regional, and local shows as well as from CBC-distributed podcasts. Here are two other areas of potential action that would

add depth to CBC Books at very low or no incremental cost while attracting greater traffic and enhancing the role of CBC Books in promoting awareness of Canadian-authored books.

Aggregating published reviews of Canadian books

Current CBC Books policy is that the site does not generate, commission, or publish a category of content termed “book reviews.” Today, that term is ambiguous. Book reviews range from the thoughtful essays published in the *Literary Review of Canada* to shorter pieces written for general readers in daily newspapers to very short notices in a variety of print sources. An important distinction is between reviews commissioned by editors and written by professional writers, or writers with appropriate background and subject knowledge, and the consumer comments (often labelled as reviews) that are posted at on-line sites like Indigo.ca and Amazon.ca. Most professionally commissioned and edited reviews reach small readerships and are not easily found by interested book readers.

Readers are experiencing steadily declining access to book coverage, including reviews, due to the drastic shrinkage of our major newspapers and magazines and the associated cutbacks in space devoted to books, including new Canadian books. Book reviews are a relatively modest source of book awareness according to reader surveys, but they play a role in first-encounter awareness leading to reading. Reviews by independent professional writers generally offer a more informed, more nuanced appreciation of books than the informal consumer comments posted by readers and offered by online bookstores or book sites like Goodreads. Without access to professionally written reviews, however, readers looking for information or evaluations have little choice but to turn to informal reader comments.

There is an opening here for a content aggregator with a sizable readership to bring together published reviews of Canadian books. We believe that the CBC Books site could and should take on that role. With first publication rights going to the publications commissioning the reviews, CBC Books could aggregate as many of the published reviews of Canadian books as possible at modest cost, making them available on an ongoing basis for interested readers.

This undertaking would be particularly valuable in the area of Canadian children’s books. Reviewing is largely done by several publications that reach mainly professional librarians, booksellers, authors, and publishers: *Quill and Quire*, *Canadian Children’s Book News*, and *CM: Canadian Review of Materials*. Aggregating these published reviews, and making

them available to parents and teachers as well as book professionals, would make a significant contribution to increased awareness of Canadian children's books and, ultimately, to the buying, borrowing, and reading of those books. Our call to action is:

63. CBC Books should extend its mandate to republishing book reviews from all Canadian publications, aggregating these reviews, and promoting them so they can be easily discovered by the audience of general readers reached by CBC's website.

Distributing publisher-generated awareness content

Book publishers and publishing organizations have taken steps to address the awareness issue with various initiatives. The Association of Canadian Publishers, the national association of Canadian independent publishers, manages a consumer-facing website, 49thShelf.com, that is intended to promote Canadian-authored books from all publishers. There has been a substantial investment of public funds in developing and maintaining this site. Regional publishing associations have awareness activities that support the books published by their members, addressing primarily local and regional audiences. They have also developed initiatives to create and produce digital content about books – material that can be found on websites maintained by these associations.

Book-reader surveys are regularly carried out to measure the impact of sources of awareness. In one of its surveys, BookNet Canada measured the audience for the 49th Shelf project alongside other sources, such as Facebook, Instagram, and Twitter.²¹ The survey measured 49th Shelf at 1 per cent, compared to Facebook at 49 per cent, Twitter at 25 per cent, and Goodreads – a better comparison because it is book focused – at 9 per cent.

The Atlantic Publishers Marketing Association has conducted similar surveys of readers in the Atlantic region. There, no industry digital initiative has shown up as a measurable source of awareness. The Atlantic publishers' traditional print promotion activities have demonstrated a measurable impact on awareness and on purchases of regional books. The audience reach of the association's digital activities is, however, measured in the low thousands of visitors per month.

Here, too, is an opportunity for CBC Books. Our calls to action are:

64. Publisher associations should develop partnerships between publisher awareness projects and CBC Books, providing their full range of quality content about Canadian authors and books to CBC Books for public distribution through its site.

65. A partnership should be put in place to allow all content currently being created by the 49thShelf.com project to be distributed by CBC Books.

In conclusion: CBC's role in Canadian book awareness

There is currently no publisher association, author organization, or other book-related institution with the necessary resources or skills to tackle the awareness issue on a scale that will make a significant difference in the English-language Canadian book marketplace. Only the CBC – specifically CBC Radio and CBC Digital – has the mission, resources, and audience reach to achieve a measurable, national impact on Canadian book awareness. An opportunity to halt the growing gap between Canadian authors and Canadian readers lies in collaboration between book publishers and the CBC. An initiative of this kind would be a valuable counterpart to the local initiative on the part of public library systems discussed earlier in this report. It would also complement the measures proposed to strengthen the independent bookstore sector and increase the presence of Canadian books in retail stores.

If the CBC opts to participate in initiatives of the kind suggested here, the benefits for Canadian writers, publishers, and readers are obvious. Writers will gain larger audiences for their books and, from the higher earnings they receive, will have greater capacity to carry on their creative work. Readers will gain by discovering a vast array of appealing, interesting, enjoyable books that they would otherwise not know about. Librarians and booksellers across the country will see greater interest and greater demand for Canadian books and will be able to reinforce their commitment to Canadian creativity by giving more prominence to Canadian books.

The benefits for the CBC are also clear. Producers and programmers will gain access to an ongoing stream of high-quality, high-interest, affordable content that appeals to current and potential audiences. Such content will assist in meeting their targets for audience growth and diversity. The high value Canadians place on Canadian books means that an increased presence for these books and their authors on the CBC will help support the public broadcaster among the Canadian public. It will also provide a new way for the CBC to align its mission with the goals of federal public policy to foster Canadian artistic expression and to make Canadian creative work readily accessible to Canadian audiences.

Conclusion

In every distribution channel examined by this report, we found that awareness of Canadian authors and Canadian books is in serious decline. Readership of Canadian books is falling, as readers turn increasingly to books from the US, the UK, and other countries. Canadians value Canadian writers and their work, but changes in the ways they find out about books, and in the ways they buy or borrow them, are eroding the presence of Canadian expression in our literary landscape.

We believe this downward trend is specific to English Canada. Thanks to significant structural differences in the French-language, primarily Quebec-based, book trade, our francophone colleagues do not share the profound sense of unease felt by the think tank participants who contributed to this report, though they do express concerns around awareness of Canadian-authored books.

The causes of this declining awareness in English Canada proved to be obvious yet still surprising. We learned that digitization – not so much books in digital, e-book form, but digitization of the business processes in the book supply chain – has been a major factor. Digital tools have made Canadian-authored books indistinguishable from foreign-authored books at virtually every point in the chain. It's no wonder that many readers report that they don't know whether the books they are reading are Canadian or not – it's often difficult to tell. And it's not unusual that bookstores and libraries don't know how many Canadian books they are stocking or how many they are selling or lending. The digital systems they use don't normally consider that a relevant piece of information to track or report. It's also understandable that bookstores and libraries don't prioritize Canadian books in their operations; their business management systems don't allow them to do so. And when it can be done, the process is awkward, frustrating, and yields an unconvincing result.

We found that the current distribution channels to school libraries and classrooms and to public library systems carry intrinsic, though unintended, biases that work against

Canadian books. We discovered that media and news coverage of Canadian books and authors can present unexpected hurdles to programmers and producers. And when we looked more closely at the steps that have been taken to help raise awareness of Canadian books and authors, we found in some cases disappointing and barely measurable results.

Addressing the decline in awareness and reading

For over three decades, there have been numerous and varied efforts by independent non-profit organizations, book publisher organizations, and others to create awareness of books and authors and to encourage more book reading in English Canada. Some initiatives are directed entirely at Canadian books and authors; others address both Canadian and non-Canadian books. These activities receive significant funding from federal and provincial sources.

Industry practice has been to describe and evaluate these activities based on an assessment of the perceived value and appeal of the activity itself, rather than a measurement and evaluation of actual results. For example, the measurement of the results produced by a public event featuring an author is a count of the attendees. This is an understandable proxy for the result that the event is intended to achieve, namely to create awareness of that author and to generate readership of the author's books. Whether attendance figures are a measure of the desired result is generally not known.

What we do know is this: the deterioration in overall awareness of Canadian authors and books and the associated decline in reading of Canadian books has happened while these promotion activities were ongoing.

In these circumstances, it is urgent for the organizers, supporters, and funders of these activities to consider a radically different approach. We set out the following observations as a first attempt to identify the approach that is needed to address this awareness gap:

- Organizations are needed that have the internal capacity – the skills, experience, knowledge, and resources – to address major components of the awareness gap in an effective way and on a meaningful scale.
- Organizations that see themselves as having that capacity, or of developing that capacity, need to step up and declare themselves.
- There is a need for a major scale-up in the available resources – a magnitude increase – to address the awareness gap in English Canada.

- Organizations seeking to address this issue should be fully committed to meaningful measurement of the results of their activities, evaluation of their work, and ongoing modifications that may arise from the measurement and evaluation in order to achieve maximum measurable results from the resources they deploy.
- These evaluation, measurement, and modification activities need to be far more rigorous, transparent, and committed than current industry practices.

It is beyond the scope of this report to do more than point to the need and opportunity for major change in what Canadian publishers individually and collectively do to create and sustain awareness of their authors and books. English Canada can look to French Canada and to the independent francophone publishing industry for many effective examples of how this can be done.

The awareness gap is a challenge for every participant in Canada's book trade. As we note throughout this report, there are concrete steps that can be taken by every sector to address it. In truth, there is a high level of mutual dependence among all these sectors. We all recognize that authors need publishers to reach readers and that publishers need authors to grow their business. We can also acknowledge that public libraries need Canadian authors and books to play their full role in the cultural life of the country, providing Canadians with access to our own creative minds, ideas, experiences, and history. This interdependence embraces us all.

One concluding call to action is:

66. Resources, organizations, and industry practice all need to be scaled up dramatically in order to tackle the large and growing awareness gap and to address the downward slide in the awareness and reading of Canadian-authored books, particularly those from independent publishers in English Canada.

A key parallel initiative that would benefit everyone with an interest in understanding the status of Canadian-authored books in Canada is to prepare and publish annual reports on awareness and reading of these books. BookNet Canada produces an exemplary set of reports, including annual reports, on retail book sales in English in Canada and has an ongoing consumer reader survey. BookNet has also carried out a range of specific studies, which have produced data on many topics.

For this report we were able to obtain statistics on the share of total book sales represented by Canadian-authored books. BookNet has the raw data to be able to analyze these

issues in many different ways – for instance, regionally. One important value of BookNet statistics is that they report on books published by all three types of publishers: independent Canadian firms, multinational branch plants, and foreign-based publishers. BookNet could provide a comprehensive picture of trends in Canadian-authored book reading generally and track the roles of the different publishing industry sectors.

We are well aware that BookNet’s data does not capture 100 per cent of English-language Canadian-authored book sales: To date, Amazon has refused to supply its sales data, some independent bookstores do not report their data, and sales through non-bookstore retailers are largely missing. It appears that sales not included in BookNet may be disproportionately those of the independent Canadian publishing sector. Those publishers, small- to medium sized and located all across the country, are strongly oriented toward finding sales in the widest possible range of retail outlets and locations. Those publishing firms often find that a substantial portion of their retail sales is not included in BookNet statistics. There is research to be done to reconcile BookNet sales numbers of Canadian-authored titles with those reported by publishers.

BookNet is in the midst of an important multi-year project to gather circulation data from public library systems and report on this activity at the title level, parallel to what they already do for bookstore sales. As noted earlier, this project will provide the public library community and other BookNet subscribers with important data on readership to supplement sales data. Among this data’s many uses will be the ability to report on the presence of Canadian-authored books in library collections and the circulation of these books to public library users. Our recommendation is:

67. BookNet Canada should expand its annual statistical reporting on the book trade to encompass data and analysis on sales and reading of Canadian-authored books through bookstores and libraries and broaden its consumer survey to measure attitudes about as well as readership of Canadian-authored books.

A second important source of data to track changes in the presence of Canadian-authored books in Canada is the Department of Canadian Heritage (DCH), which obtains extensive information on the activities of most Canadian-owned publishers in annual applications for support from the Canada Book Fund. Data from this source was requested and provided for this report, and this data is set out in the brief historical review in this report. Comparative data for the period in the early 2000s was published by DCH in a statistical report.

We believe that book trade participants and policy makers would all greatly benefit from annual publication of data on Canadian-authored book awareness and reading. Our recommendation is:

68. The Department of Canadian Heritage should prepare an annual report of industry statistics based on data received from Canada Book Fund recipients to report on and analyze trends in publishing, sales, and readership of Canadian-authored books published by the Canadian-owned publishing sector

The uncertain future of independent and multinational Canadian publishing

We could not consider the future of Canadian books and writing without the context of Canadian publishing, and this report reflects on the very different implications and consequences of a decline in the reading of Canadian books for the independent and multinational sectors.

The long-term achievement of Canadian cultural policy has been to foster a strong, diverse community of writers and publishers. The creation and production of books by Canadian authors and independent publishers is now securely rooted across Canada.

The multinational publishers in Canada have meanwhile steadily increased their share of the market by publishing Canadian-authored books to sell alongside those originated by their foreign parent firms. As previously noted, successful publishing by a branch plant helps sustain the separate existence of that branch plant. If the Canadian list declines in profitability, however, the rationale for a separate operation in Canada diminishes. In that situation, the managers of the branch plant have an interest in ensuring that their Canadian-authored books find readers in Canada. As a result, there is a certain limited common interest between the independent publishing sector and the multinationals in addressing the decline in awareness and readership of Canadian books. We should note, though, that a wholehearted and unconflicted commitment to this objective comes only from the independent publishing sector, which derives no benefit when Canadians buy foreign-authored books instead of Canadian-authored ones.

The current situation has important and worrying implication for independent Canadian houses. Growth for these firms has, in recent years, meant growing export sales of Canadian-authored books. A majority are now exporters, and exports as a percentage of total

sales are increasing for many English-language firms. These sales have been particularly appealing lately because the decline of the Canadian dollar has had a dramatic impact on profitability. So the skills, abilities, knowledge, and management attention of independent publishers have been redirected toward exports, and in particular to exports of printed books to the US – by far the most profitable strategy available to Canadian firms.

As a consequence, independent publishers are encountering a new opportunity, one that encourages them to adjust their publishing decisions and acquire or develop those Canadian-authored books that can be successfully marketed not only in Canada but also in the US. This influences the kind of books that writers can write to be published and the kind of subjects they can tackle. It introduces a bias against books that are relevant, interesting, and important to Canadians only.

A second consequence is that publishers will be led to accept books that fit with the publishing house's list but are written by non-Canadian authors. A successful Canadian publisher of illustrated non-fiction for children, for instance, who sells titles in the US will soon find manuscript proposals arriving from US authors writing in this same genre. If the Canadian publisher knows from experience that it can successfully publish and market an American author in the US and sell a few copies in Canada, too, such a project represents an appealing business opportunity. Under the support programs of federal and provincial governments, an American-authored book will not generate the grant revenues that a Canadian-authored book does. However, a profit-and-loss projection for the foreign-authored book may show that it can stand as a viable project without subsidies. It may well be more profitable than an alternate project from a Canadian author.

Opportunities of this kind are now regularly presenting themselves to independent Canadian publishers. The publishers' commitments to Canadian authors, and to the Canadian market, remain, but their experience of the shrinking Canadian market for each new book tilts them toward thinking of export sales first. Once the US market is the prime market for new projects, opting for American-authored manuscripts is a logical next step.

It is reasonable to expect that more independent Canadian publishers will react to market developments in these ways. The response is sound business strategy, after all, but it is undermining cultural policy objectives. Providing substantial public support to develop and sustain an independent Canadian publishing industry is appropriate only if that publishing capacity is used to allow Canadian writers to effectively reach Canadian readers. If public policy does not address the shrinking demand for Canadian books in Canada, the publishing capacity that has been slowly developed with an investment of many millions of public

dollars over the past four decades will be diminished and ultimately lost. Canada will have a Canadian-owned sector, but it will be publishing for foreign markets. Canada, as an independent voice with our own values, experiences, attitudes, creativity, and history, will shrink from sight in the world of books.

Rebuilding the infrastructure for Canadian writing and Canadian books

Canadian literature emerged as a successful expression of Canada's cultural life in the 1960s and 1970s, the result of the work of highly talented writers; imaginative, entrepreneurial book publishers; and the support and audience-building role of CBC Radio. Success in the past, however, is no guarantee of security in the future. Much of the ground that was gained began to give way at some point in the 1990s or early 2000s. The impact of digital infrastructure, the realities of the English-language book trade, and the introduction of digital media as a growing source of awareness of books has cost Canadian books even more ground, and those losses are accelerating. Publishers may well carry on, but the survival and continuation of an independent national literature in English Canada is by no means assured.

Canada needs to rebuild the awareness, distribution, and readership components of the supply chain that carries books from writers to publishers to bookstores and libraries to readers. This document identifies a number of interventions and initiatives that we believe will effectively launch that rebuilding effort. We offer its information, analysis, and ideas for consideration by everyone involved and committed to Canadian books and to the policy makers whose mandate is to sustain and foster Canadian cultural life.

Canada is an independent country only because Canadians have insisted on the measures necessary to attain that status. Canada now has its own independent cultural life, but only because Canadians have worked hard to create and maintain it. If we want to continue to have a vigorous, lively, and mature book culture, we have to take bold steps to preserve it. As writers, publishers, librarians, booksellers, media producers, readers, policy makers, and political leaders, we have to act now to make the changes and take the initiatives that are needed to have our own books read and enjoyed today and into the future.

Summary of Recommendations and Calls to Action

These recommendations and calls to action are provided by the steering committee based on conclusions drawn from the think tank discussions. They should not be taken as representing the views of all members of the think tank or of their organizations.

Independent bookstores

These initial proposals have the goal of doubling the sales of Canadian-authored books in the existing independent bookstore sector and achieving 50 new independent bookstores across Canada in the next 5 years.

1. Public funding to qualifying independent bookstores for staffing and other direct costs of events and awareness activities, including digital initiatives, featuring Canadian authors and their Canadian-published books.
2. Collaboration between Bookmanager and BookNet to promote independent bookstore start-ups and to provide support in the form of promotion of the concept, new bookstore owner-manager training, and the development of measures that publishers can implement to assist with new stores' opening inventory financing.
3. Immediate access for qualifying new independent bookstores to public library purchasing of Canadian-authored and Canadian-published books.
4. Independent bookstores should be eligible for municipal support as cultural spaces in the form of subsidies or property tax rebates when such measures are required to allow them to operate as viable business operations.
5. Develop and implement programs in all Canadian provinces whereby accredited bookstores become the source for publicly funded purchases of Canadian-authored books by schools and public libraries in exchange for stocking and displaying a wide range of Canadian-authored titles.

School classrooms and libraries

The goal of the following proposals is to substantially increase the access that children and teens have to Canadian authors and Canadian books in school classrooms and libraries. In the absence of reliable data about their presence today, quantifying this goal will require further research and information gathering.

6. The creation of policies by provinces and school boards to assert the educational and cultural importance of young Canadians' ample access to the work of Canadian authors and to Canadian books expressing Canadian experience, values, attitudes, and culture in all formats, subjects, and age levels in school classrooms and libraries.
7. Tree awards expand the range of children's and teen Tree award nominees to encompass a "long list" of as many books as their evaluation teams find suitable for recommendation as appropriate for classrooms and school libraries, similar to the long lists regularly developed by *CM: Canadian Review of Materials* reviewers and the Canadian Children's Book Centre's Best Book evaluators. This much-enlarged selection would create an annual list of several hundred new Canadian-authored books, all with the authoritative endorsement of the Tree awards' quality standards, for every age group of children and teens.
8. Provincial governments and the federal government should implement their overall educational and cultural goals with respect to literacy, reading, and providing a grounding in Canadian culture by fully funding the annual purchase by public schools of all Tree award titles in quantities adequate for classroom and school use and by permitting maximum participation in the Tree awards programs by all students, regardless of the access to resources at the schools or boards.
9. Provincial Tree award book purchase funds should be tied to accredited bookstores, whose accreditation would require fully stocking and displaying Tree award titles plus a wide selection of Canadian-authored titles for public and professional buyers.
10. Publishers submitting titles for Tree award consideration would continue the existing practice of selling the books on specified discount terms and contributing a percentage of these sales to Tree award administrative organizations across the country to cover the costs of running these award programs.
11. In provinces where the majority of current Tree award title purchases are channelled through library wholesalers, a three-year transition to the accredited bookstore model should be allowed, which would give affected wholesalers time to adapt by integrating an accredited bookstore presence into their operation, just as

many successful independent bookstores have developed wholesale operations that sell to school and public libraries.

12. Provincial governments should regulate school book fairs and require all school book club retailers to include a wide range of affordable Canadian-authored titles, including a fair range of titles from independent publishers, in all school book fairs.
13. School book fair regulations should give priority access to local accredited bookstores with a presence in their communities on terms at least as favourable as those accorded to their current book fair supplier.
14. Funding for a major portion of the costs of software enhancements and upgrades, to allow for the capture and display of metadata fields reflecting Canadian authorship and Canadian content, and for recommendation engines that give priority and preference to Canadian content, fairly balanced between books originated by multinationals and independent publishers.
15. Provincial governments should ensure that policies designed to encourage the use of Canadian-authored materials are accompanied by funding specifically dedicated to purchasing these Canadian materials.
16. To foster the creation of materials, including digital materials, reflecting Canadian experience, values, attitudes, and culture, provincial governments should ensure that their funding support allows Canadian materials to sell at prices equivalent to similar materials created elsewhere and that the funding for the purchase of these materials is adequate to guarantee their acquisition and use as called for by their educational and cultural objectives and policies.
17. Provincial education ministries and departments should gather data on student access to and use of Canadian-authored print and digital materials, enabling evaluation of the policies and programs aimed at achieving substantial increases in access and use.

Public libraries

The goals of the proposals below are to solidify the public libraries' role of offering Canadians access to a wide range of Canadian-authored books and to identify public libraries in the public mind as champions of Canadian authors and Canadian books. The success of these proposals should be measured by data that reflects the presence of Canadian books in public library collections, the level of awareness of these books that libraries are able to create, and the readership by public library users. Some baseline data are available on these metrics and more is on the way, but there is a need for more comprehensive data on

the role of Canadian-authored books in public library systems in order to evaluate the impact of proposals such as these:

18. Public library systems should crystallize their role regarding Canadian culture and Canadian books by incorporating in their collection policy the objective of making known and available a wide range of Canadian-authored books in all genres and on all subjects to all public library users.
19. Public library systems should establish a separate budget category and a separate collection development structure for purchasing, building, and maintaining branch collections of Canadian-authored books alongside other categories of library materials.
20. The federal government should institute a new Canada Book Fund component to augment existing public library system spending on Canadian-authored books, matching current spending and every incremental public library system dollar thereafter.
21. Federal funding support should be provided for the incremental costs of improving the digital infrastructure used by public libraries for collection management so that Canadian-authored books can be identified as such in library catalogues and users can easily search and discover Canadian-authored books.
22. As a component of a federal program of support for enhancing awareness and reading of Canadian books via public libraries, funding should be made available to public libraries to cover a substantial portion of the costs of digital promotion initiatives featuring Canadian-authored books.
23. Federal funding for Canadian-authored book collection development in public libraries should be adjusted to compensate for the higher costs experienced by libraries moving their Canadian-authored book purchasing to accredited bookstores.
24. Independent publishers should ensure that new Canadian-authored books are identifiable with an industry-wide provenance label, which publishers and publisher organizations would promote to enhance the discovery of independently published Canadian-authored books.
25. Canadian public library systems should use their relationship with their e-book circulation management vendors to secure enhancements in this digital infrastructure to create awareness and manage the circulation of e-books, allowing them to identify and give priority and special presence to Canadian-authored books in their e-book collections.

26. Canadian public libraries should consider moving to a separate digital infrastructure for Canadian-authored e-books if this is necessary to allow them to deal with publishers and authors on business terms that offer fair compensation for the multiple use of e-books in their systems and/or to promote local/regional/Canadian e-book titles successfully.
27. Publisher organizations should collaborate with public library organizations to develop business terms for Canadian-authored e-book sales and the digital infrastructure required to support those sales in ways that are fair to libraries, publishers, and authors.
28. Publishers and librarians should reinstitute an annual professional conference for the exchange of information and for collaborative work on the measures that will enhance the role of public libraries in creating awareness and increasing the reading of Canadian books.
29. Library organizations' professional development programs, post-secondary curricula, and information channels should be encouraged to increase their coverage of Canadian books and Canadian publishing. Publishers should support and offer their participation in these efforts to help broaden librarians' knowledge of the writing and publishing scene in Canada.
30. Publishers and industry organizations should greatly improve their methods of providing public library book selectors with comprehensive and timely information on upcoming Canadian-authored titles, including high-quality cataloguing data, and with ongoing promotional ideas – displays, promotions, and digital communication with patrons – to foster awareness and reading of Canadian titles in library collections. Appropriate mechanisms for creating awareness among branch library staff should also be developed.
31. Measures to provide better information and data to publishers about demand and use of books in public libraries should be encouraged, permitting publishers to initiate publishing projects to meet the needs of public library users.
32. Professional library book reviewing organizations and media should be eligible for funding support to help raise their profiles among librarians, increase their coverage of Canadian-authored books, operate on schedules that serve the needs of public library collections development, and ensure their resources are affordable for all public libraries.
33. Public library systems and publishers should collaborate in developing innovative measures and in implementing these and other proven steps to enhance the role of public libraries in creating awareness of Canadian-authored books through all means, including displays, promotions, and digital communication with users.

34. Development of digital infrastructure with the capacity to recognize and promote Canadian-authored books in public library collection operations and collection management, for both print and digital formats, should be eligible for funding support under an enhanced Canada Book Fund program. The enhanced digital infrastructure should allow full identification of the local and regional dimensions of the subject matter and authorship of Canadian books.

University libraries, bookstores, and courses

These recommendations acknowledge the full range of the role of universities in Canadian education, culture, research and intellectual life. Universities have a unique opportunity to contribute to Canadians' knowledge, understanding, and creation of our own culture, as well as that of other countries.

35. University libraries should adopt as one component of their collection policy that they will collect every scholarly book and appropriate trade book authored by a Canadian in every field of study at their university.
36. University libraries should specify in their approval plans to e-vendors and print wholesalers that the acquisition of a title by a Canadian author is a priority.
37. University libraries should set aside a designated portion of their acquisition budgets for Canadian-authored and published books.
38. The Canadian Foundation for Innovation should provide a new round of funding to ensure that university libraries that have not bought backlist titles from participating Canadian university presses since the 2008 initiative are able to purchase backlist titles not in their collections.
39. The Social Sciences and Humanities Research Council should establish a new strategic program in its research communication division. Funded at \$1–3 million annually, this program would enable the approximately 700 frontlist and peer-reviewed Canadian books (not including books designated by publishers as course adoption books) published by Canadian university presses to be digitally available in every university library in Canada. SSHRC would review university press programs every three years, as it does for journals, and make the purchase directly from the publishers.
40. The Social Sciences and Humanities Research Council should establish a parallel strategic program in partnership with all public library systems to ensure the widest possible access to books published by university presses in digital form by public library users.

41. The Social Science Federation of Canada should increase the funding budget of the Awards to Scholarly Publishing Program to ensure that all books that pass peer review and are adjudged by the ASPP in the “good” category are supported. To enable this, the number of titles supported should be increased to 240 titles annually, and the average grant should be increased to \$12,000 per title to enable proper and affordable dissemination of scholarly published books by Canadian authors.
42. Those universities not included the current agreement between ACUP, eBOUND Canada, and CRKN should participate in the collective purchase of university press e-books for frontlist as well as backlist title purchases, so that professors and students in all Canadian universities have access to the same books. This should be done urgently, while the current agreement is in effect.
43. Trade publishers of titles suitable for university libraries and eBOUND Canada, together with CRKN and university libraries, should develop and implement a parallel initiative under which university libraries acquire appropriate e-books from independent Canadian trade publishers.
44. The Canada Book Fund should include a new component for a program parallel to the SSHRC initiative, as recommended in no. 39 above, to fund the purchase of e-books published by independent Canadian trade and academic publishers appropriate for university libraries on the terms negotiated by the parties in the previous recommendation.
45. The titles destined for university libraries should be housed with Scholars Portal and those destined for public libraries with Overdrive or another digital depository.
46. The descriptive metadata used by the publishing industry and the library profession should be enhanced to hold and display a data tag identifying Canadian-authored books. This would facilitate searching for Canadian books and encourage awareness and discovery of Canadian books by university library users. Support where needed for this metadata practices upgrade should be part of an industry-wide initiative of the Canada Book Fund. It should be undertaken in parallel with the initiative recommended above (no. 24), which outlines that publishers ensure that new Canadian-authored books by university presses and independent Canadian trade publishers be identified with an industry-wide provenance label, which publishers, authors, and publisher organizations would promote to enhance the discovery of independently published Canadian-authored books.
47. Canadian university and academic presses should create a seasonal collective electronic catalogue with quality metadata of all their forthcoming titles in

English, French, Indigenous languages, and other languages for distribution to university libraries so that joint promotional plans, displays, and author readings can be undertaken with those libraries.

48. Every Canadian university should give its bookstore a mandate to operate a substantial “store within a store,” with a specific emphasis on Canadian-authored books. These stores should be eligible to participate in government measures to support independent bookstores, including accreditation and support for awareness events and activities.
49. Software used by Canadian university bookstores to support a trade book operation should be eligible for government support for replacement, upgrading, or enhancement that enables greater visibility and capacity to privilege Canadian-authored books.
50. Canadian universities should retain (and where necessary, regain) management and control of their bookstores and give bookstore managers a role and level of responsibility parallel to that of an independent bookstore owner/manager to achieve the multiple mandates of their store.
51. University bookstores should be placed in management structures that are devoted to their university’s cultural and educational missions.
52. Community colleges should serve their students, faculty, and communities by extending the mandate of their campus bookstores to operate a “store within a store” trade bookstore, following the practices recommended for all Canadian university and college bookstores.

CBC Radio and CBC Digital

The goal of these calls to action is to reverse the downward trend in awareness of Canadian-authored books by a range of initiatives, with early emphasis on collaboration between publishers and CBC as a public cultural institution with a mission that closely overlaps the mission of book publishers. The audiences that publishers and the CBC reach have similar interests and demographics. Both sides can benefit from pursuing initiatives that make greater use of authors and books for programming and content. CBC’s audiences in English Canada are substantial, and these initiatives can achieve a major impact on awareness at the local, regional, and national levels.

53. The leadership of publishing organizations and publishing houses across Canada should contact and build relationships with CBC English-language national and

- regional management, based on their shared mission to create, produce, and distribute Canadian cultural work to the Canadian public.
54. Publishing organizations across the country should develop a coordinated plan to inform all levels of the CBC, from senior management to production units, of the strong overlap between CBC Radio's audience and the book reading audience; the wide range of accessible content represented by Canadian books and authors, particularly local and regional books and authors; and the many opportunities for synergies in audience outreach between publishers' marketing and promotional activities and CBC Radio's and CBC Digital's content development.
 55. Develop a national English-language book news site and digital publication that targets a professional audience of media producers and news reporters and will highlight new and newsworthy Canadian books and their authors, plus those authors and books relevant to current news events.
 56. Publisher organizations should develop the capacity for and offer professional media training to authors of forthcoming books.
 57. Publishers should develop a standardized short-format video presentation for new Canadian books, which would be included in all promotion packages provided to media contacts.
 58. Provincial and regional publisher organizations, working with local and regional CBC management, should seek to have a dedicated CBC Books unit staff member in their province or region, who would be responsible for aggregating book-related content and delivering it to the CBC Books portal and for generating additional content based on regional writing and publishing activities.
 59. CBC Radio should establish goals for creating awareness of Canadian books and authors as a baseline for every program unit and adopt a standard that 50 per cent of the coverage of books and authors be Canadian in content or authorship.
 60. Book-related event organizers should consider the potential of every public event for radio programming, digital content, and/or podcasts. Publisher marketing organizations should offer their expertise in how to propose and package public events for distribution through the CBC.
 61. Publishing marketing organizations should facilitate sessions involving independent publishers and experienced radio broadcasters to brainstorm programming ideas that would enhance awareness of Canadian authors and books.
 62. Publisher marketing organizations should coordinate information gathering by publishers from their international contacts regarding public broadcasting activities to identify examples of radio program formats not currently used in

Canada that have proven their ability to generate interest in and awareness of books and authors.

63. CBC Books should extend its mandate to republishing book reviews from all Canadian publications, aggregating these reviews, and promoting them so they can be easily discovered by the audience of general readers reached by CBC's website.
64. Publisher associations should develop partnerships between publisher awareness projects and CBC Books, providing their full range of quality content about Canadian authors and books to CBC Books for public distribution through its site.
65. A partnership should be put in place to allow all content currently being created by the 49thShelf.com project to be distributed by CBC Books.

Conclusion

The impact of this report will depend on the response of book professionals and policy-makers, and on their decisions about how to engage with the need to change the structures of the book trade. Much has to be done to respond to and respect the interests of Canadians in having a cultural life that encompasses our own literature and our own thinking alongside work drawn from the rest of the world. As these initiatives develop and move forward, public agencies and book trade organizations need to track results and to measure the steps that are taken, so that everyone can see what is being accomplished in reinvigorating English Canada's book culture here in Canada.

66. Resources, organizations, and industry practice all need to be scaled up dramatically in order to tackle the large and growing awareness gap and to address the downward slide in the awareness and reading of Canadian-authored books, particularly those from independent publishers in English Canada.
67. BookNet Canada should expand its annual statistical reporting on the book trade to encompass data and analysis on sales and reading of Canadian-authored books through bookstores and libraries and broaden its consumer survey to measure attitudes about as well as readership of Canadian-authored books.
68. The Department of Canadian Heritage should prepare an annual report of industry statistics based on data received from Canada Book Fund recipients to report on and analyze trends in publishing, sales, and readership of Canadian-authored books published by the Canadian-owned publishing sector.

Think Tank Volunteer Participants

Biographies

SUSANNE ALEXANDER is the publisher of Goose Lane Editions. Since joining the company at the tail end of the 1980s, she and her colleagues have expanded the publishing program to include more than 300 active titles, encompassing not only fiction and poetry, the heart and soul of the company, but also a wide range of non-fiction titles, including art, biographies, histories, and travel memoirs; works on contemporary social issues; and volumes by Acadian writers in translation. Their most ambitious books? The 1,200-page *Passamaquoddy-Maliseet Dictionary* and *SakKijâjuk: Art and Craft of Nunatsiavut*, scheduled to be issued in English, French, and Inuktitut.

Susanne has served as president of the Atlantic Publishers Marketing Association and Enterprise Fredericton and on the boards and executive committees of the Literary Press Group of Canada and the Association of Canadian Publishers. She has also served on juries and advisory committees for the Canada Council of the Arts, the Department of Canadian Heritage, and the governments of Ontario, Manitoba, Saskatchewan, and New Brunswick.

DYAN BADER has a keen interest in technology and how it can be used to improve the experience of library users. She has been a librarian in three provinces and one state. Through her work, she has learned the value of collaboration, compromise, and creativity. She currently works with public libraries in Nova Scotia.

Dyan was the librarian lead on the Atlantic Canadian e-book Collection. She facilitated the drafting of an e-book licencing agreement between the province/public libraries and publishers for a virtual collection that showcases the works of Atlantic Canadian authors and publishers.

ROBERT BALLANTYNE was born and raised in Smiths Falls, Ontario. He attended the University of British Columbia, where he attained a BA in English Literature and an MA in Art History. He joined Arsenal Pulp Press in 1996 and has been vice-president/associate

publisher since 2004. He is also a past president of the Association of Book Publishers of British Columbia.

PHILIP CERCONE was for 10 years director of the Awards to Scholarly Publications Program. In 1985, he took up an academic appointment at McGill University as executive director and editor-in-chief of McGill-Queen's University Press, and since then he has published some 2,700 books. He is also the series editor of the press's internationally distinguished History of Ideas Series, for which some 80 books have been published since it was established in 1985. He has been president of a number of organizations, including the following: Association of American University Presses, Association of Canadian Publishers, Association for the Export of Canadian Books (now Livres Canada Books), Association of College and University Publishers, Association of Quebec University Presses, Association of English Language Publishers of Quebec, and the Italian Canadian Professional and Businessmen Association of Canada. He was one of the founders of eBOUND and in 2010 was given an Association of Canadian Publishers' award for "leadership through volunteer Service to the publishing industry and to ACP."

CHRISTINA DE CASTELL was director, collections and technology, at Vancouver Public Library, where she was responsible for service and strategy for collections, digital services, and technology. She is now chief librarian of the Vancouver Public Library. She is passionate about reading, learning, and libraries and is fascinated by the way that technology is changing these experiences. Christina has represented the world's and Canada's libraries at United Nations forums, including the World Intellectual Property Organization and the Internet Governance Forum, and she is a member of copyright and e-book leadership groups for libraries in Canada and internationally. Christina is the co-author, with Paul Whitney, of *Trade eBooks in Libraries: The Changing Landscape* (DeGruyter, 2017).

DENISE DONLON is one of Canada's most innovative broadcasters and respected corporate leaders. She is renowned for incorporating social justice, arts and culture, and human rights advocacy into her work. A member of the Order of Canada since 2004, Denise has served as general manager of CBC English radio, president of Sony Music Canada, and VP/GM of MuchMusic and MuchMoreMusic.

NOAH GENNER has an extensive background in independent bookselling, software, and business development. As the leader of BookNet Canada, he orchestrates a skilled team of technical, policy-oriented, and client-focused staff to provide new data management services and supply-chain initiatives to the Canadian publishing, library, and book retail sectors.

Before working at BookNet Canada, Noah ran his own technology and software development consulting business, servicing a wide range of clients, including book publishers and printers. Prior to that, he was director of software development for consumer market research leader Compusense, where he oversaw the development of a variety of software services used by numerous Fortune 500 companies worldwide. Noah serves on the board of directors of the Book Industry Study Group, eBOUND Canada, Livres Canada Books, and EDItEUR.

STEVEN GLASSMAN started his career as a biologist (McGill, 1974) and spent a dozen years as a professional agronomist. He then completed an MBA (York, 1986) and moved into the printing industry. In a company specializing in community newspaper printing and later a direct-mail print shop, Steve oversaw dramatic changes to adapt to new technologies. He is the director of York University's in-house print shop, mailing department, and bookstore. He is proud to be the co-founder and co-owner of an "iconic" downtown Toronto bookstore, Pages Books, which closed in 2009 after 30 years.

DON GORMAN has spent most of his professional life working within the book trade and has held positions as a bookseller, bookstore owner, publisher's sales representative, and acquisitions editor. In 2006 he took over RMB|Rocky Mountain Books (rmbooks.com), a well-established and respected guidebook company that traditionally published three to five books per year. Since then, he has repositioned the company for the 21st century and now successfully publishes and promotes a yearly catalogue of 20 to 30 provocative, engaging, and award-winning books on mountain history, adventure travel, outdoor culture, environmental consciousness, and contemporary photography as well as children's books. He has served on the boards of the Association of Canadian Publishers, Association of Book Publishers of British Columbia, Book Publishers Association of Alberta, and the College of Fellows for the Royal Canadian Geographic Society. An avid fly fisherman, hiker, and runner, he and his kids live in Victoria, British Columbia.

CHRIS HALL has worked in the book industry at McNally Robinson Booksellers in Winnipeg since 1996. He started as a bookseller, got the opportunity to try many more aspects of running a bookstore, and, in 2015, officially took over as co-owner with Lori Baker, his business partner. They now own McNally Robinson Booksellers and Prairie Ink Restaurants in Winnipeg and Saskatoon as well as Skylight Books, a library and school wholesaler based in Winnipeg. They have plans to open a new small store at The Forks in Winnipeg in early 2018.

RICHARD JONES is co-owner of Pajama Press Inc., a Canadian publishing company specializing in quality children's books. Richard has had a long, successful career in the publishing field, particularly in school library sales. His 49 years in the industry includes regional sales manager for Gage Publishing and president of GLC Publishing. Since 1980, Richard has contributed to the success of several national library wholesalers: Learning Tree (a.k.a. National Book Service), Shirley Lewis Information Services, S&B Books, and Whitehots. Richard is very knowledgeable about "take-away" book displays, which are currently the main vehicle for school library book purchasing in most of the major Ontario school boards.

DIANE LANGSTON worked in children's books wholesaling for over 30 years prior to her retirement this year. In the early days of Canadian children's book publishing and wholesaling, she worked as a sales representative in British Columbia and Alberta. After a brief interlude in the wine industry (marketing and promotions), she landed at United Library Services (Calgary) in the role of children's book buyer and manager of collection development. Diane has participated extensively in the children's book community, chairing the Calgary chapter of the Children's Literature Round Table, as a committee member for the Kaleidoscope Children's Literature Conferences, and as a board member for the Canadian Children's Book Centre. She is currently working on an event related to children's literature and truth and reconciliation with Canada's Indigenous peoples.

JAMES LORIMER is the co-owner and president of James Lorimer & Company Ltd. in Toronto and the owner/publisher of Formac Publishing in Halifax. Lorimer & Co has published well over 1,500 books by 1,000-plus authors since it was established in 1970, including more than 500 children's and teen books. Formac has published 750 books since 1982 by 600-plus authors.

He has always been involved in industry associations and activities. He was one of the founders of the organization that became the Association of Canadian Publishers, the long-term treasurer of the Atlantic Publishers Marketing Association in the 1990s, and a member of the founding board of BookNet Canada, 2003-08. He was also director and treasurer of eBOUND Canada. He served two terms as a trustee of the Toronto Public Library and was chair in 1976. He has divided his time between Halifax and Toronto since the late 1970s.

He graduated in economics from the University of Manitoba and received his PhD at the London School of Economics. He is the author of eight books, including a national

bestseller *The Developers* (1978) and the first study of reading in Canada, *Book Reading in Canada 1978* (1983).

BERNIE LUCHT is a distinguished visiting professor in the RTA School of Media at Ryerson University. He was a CBC Radio producer for more than 40 years. Between 1984 and 2012, he was executive producer of the long-running CBC Radio program *Ideas* and the annual CBC Massey Lectures series. He is a member of the Order of Canada and a recipient of the Queen Elizabeth II Diamond Jubilee Medal.

CAMERON MACDONALD's career has focused on the creation, provision, and dissemination of scientific and technical research and information. Most recently, he has led the privatization process that saw the move of the National Research Council of Canada's NRC Research Press from a government program to a not-for-profit private corporation headquartered in Ottawa. Prior to working for NRC Research Press, Cameron worked for CISTI, Canada's National Science Library, in a variety of positions, including director, publisher relations; manager of marketing services; and manager of electronic products services. Before joining CISTI, Cameron worked for the Canadian Standards Association, the Ontario Ministry of Consumer and Commercial Relations, Technical Standards Division, and several engineering and architecture organizations. Cameron is currently retired but very active on the boards of the Canadian Association of Learned Journals and Access Copyright. Cameron has a masters in Library Science from the University of Toronto and a bachelors of arts from Trent University.

SUSAN MCINTOSH began her publishing career at Douglas & McIntyre/Groundwood Books as the sales rep for Ontario and left in 2005 as VP of sales and marketing. She is currently associate press director at McGill-Queen's University Press (MQUP) with responsibility for sales and marketing in all territories. She has most recently been providing marketing support and planning for MQUP's new UK operation. Susan has served on the boards of the Association of Canadian Publishers, Livres Canada Books, and Association of English-Language Publishers of Quebec.

PETER MANDELLOS is the director at Paragraphe Bookstore, with almost 30 years of bookstore experience in the heart of downtown Montreal. Paragraphe is Quebec's largest independent, spirited, full-service, English-only bookstore. Peter is responsible for all aspects of the business, including Paragraphe's English wholesale division to libraries, which is the largest in the province. Peter is extremely proud of Paragraphe's participation in over 80 literary events a year and has been involved in over 1,500 book events throughout his career.

JEFF MILLER is the president and publisher of Irwin Law Inc, which he helped found in 1995. Prior to starting Irwin Law, he was the higher education publisher at Copp Clark Ltd. He is the past president of the Ontario Book Publishers Organization and currently a governor and treasurer of the Canadian Copyright Institute.

MICHAEL NEILL is the founder and owner of Bookmanager. He's been the owner of Mosaic Books since 1995 (founded in 1968). Both companies are managed by Michael's wife, son, and daughter in Kelowna, BC. Bookmanager provides systems to manage point of sale, inventory, supply-chain efficiencies, sales reporting and ranking, bibliographic data, tools for buying frontlist and backlist, and e-commerce websites for bookstores. Bookmanager started in 1987 and is currently used by over 350 independent bookstores, including 300 in Canada.

BRIAN O'DONNELL (facilitator) brings a breadth of knowledge and experience gained from over 40 years in the publishing industry. He was director of business development and international relations at Access Copyright after more than 15 years as president and CEO of Irwin Publishing. His background is academic and educational publishing, and he has worked for several companies, including Addison-Wesley and Copp Clark Publishing. Brian also taught in the Publishing Program at Ryerson University and has written and developed online courses for educational and academic publishing as well as the business of book publishing.

VICTOR RABINOVITCH was the president and chief executive officer of the Canadian Museum of Civilization Corporation (2000-11), which is responsible for the Canadian Museum of Civilization and the Canadian War Museum. Before joining the corporation, Victor was assistant deputy minister, income security programs, at Human Resources Development Canada. From 1995 to 1998, he served as assistant deputy minister, cultural development and heritage, in the Department of Canadian Heritage. He was responsible for policies and programs in broadcasting, cinema, publishing, sound recording, copyright, museums, and performing arts. He led the departmental team responsible for the modernization of Canada's Copyright Act and the implementation of programs to assist book publishing, such as the program that has morphed into the Canada Book Fund, film and television production, museums, and national cultural-training institutions. Victor was also assistant deputy minister at Fisheries and Oceans Canada, where he served in a variety of capacities.

Before joining the federal public service, Victor specialized in labour issues, serving as national secretary for Workplace Health and Safety with the Canadian Labour Congress from 1978 to 1982. From 1976 to 1978, he served as executive director, Manitoba Department of Labour. His publications include “Method and Success in Canada’s Cultural Policies” and “Museums Facing the Trudeau Challenge.” He is currently a distinguished fellow of the School of Policy Studies at Queen’s University, where he teaches courses on Canadian cultural policy.

KEN ROBERTS was the chief librarian of the Hamilton Public Library from 1994 to 2012. During his time at Hamilton, the library system received numerous national and international awards. Ken was a member of the Royal Society of Canada’s Expert Panel on the future of Canada’s libraries and archives. He is the recipient of multiple awards, including induction into McMaster University’s Alumnae Gallery of Distinction.

As a children’s novelist, Ken was nominated for the Governor General’s Award, the Christie Book Award, the Canadian Library Association’s Children’s Book of the Year Award, the Silver Birch Award, and the Silver Birch Express Award. He is one of only a handful of Canadian writers named to the Horn Book/Fanfare Book of the Year list, and his books have received starred reviews in *The Horn Book*, *Library Journal*, and many other publications. He is (sort of) retired and lives on Vancouver Island.

ERROL SHARPE founded Fernwood Books in 1978, a sales and marketing company that today operates under the name Brunswick Books, representing over 20 publishers. He was a co-founder of Garamond Press (1982) and the founder of Fernwood Publishing (1992). He holds an MA from Saint Mary’s University and worked for over 20 years as a contract professor at Atkinson College, York University, and later Saint Mary’s University. He is the author/co-author of several books, scholarly papers, and magazine articles. He lives in Boutillier’s Point, Nova Scotia, with his partner, Beverley Rach.

CAROL STEPHENSON, for the past 30 years as an academic librarian, has been engaged in issues affecting scholarly communication, including roles at the university, provincial, and national levels, and has participated on publisher advisory boards. Carol currently provides electronic resources licensing and negotiation services to the Council of Prairie and Pacific Libraries, which includes 37 universities and colleges in western Canada. Carol was also involved in the Ontario university e-book deal with eBOUND and the Association of College and University Printers as part of her previous licensing role with the Ontario Council of University Libraries.

RICHARD STURSBURG has spent his entire career working in broadcasting, film, television and program production. He was assistant deputy minister, culture and broadcasting, at the federal Department of Communications, president of the Canadian Cable Television Association, CEO of Starchoice and Cancom (now Shaw Direct), chairman of the Canadian Television Fund, executive director of Telefilm Canada, and head of English services at the CBC. His book, *The Tower of Babble*, was named one of the best books of 2012 by the *Globe and Mail*.

JOYCE WAYNE (facilitator) is an author, editor, and educator. She was the trade editor at *Quill & Quire*, the editorial director of non-fiction at McClelland & Stewart, and the publicist for James Lorimer & Co. She is the recipient of the Fiona Mee Award for literary journalism.

For 25 years she taught at Sheridan College in Oakville, where she was the head of the Journalism program, director of the Centre for Internationally Trained Individuals, and the faculty's representative on the board of governors. In 2014, she published her first novel, *The Cook's Temptation*. She writes a regular column for a Canadian bank and is working on a new book.

MARILYN WILLIS has 35 years' experience in the education field, completing her career as coordinator of Library Service in the Peel District School Board. She received the Award of Excellence for her advocacy for the school library. On her retirement, she continued her role in library services with book selection for K to 12 schools for Whitehots, presenting at national conferences, and consulting with schools. Marilyn has recently been involved with the Ministry of Education and their Experience Ontario program, helping grade 12 students choose their next steps. She was also involved with StAR program, encouraging young researchers as they changed their world. She currently supports the Canadian Children's Book Centre with book selection. During the summer, she mentors teachers in Hefei, China.

Sources for Charts

Chart 1

Source: Department of Canadian Heritage, Canada Book Fund applicants for the relevant reporting year. The data includes new titles designed as trade books, and does not include textbooks or reference books.

Chart 2

Source: BookNet Canada SalesData, reporting on list value of unit sales of print books from retailers and wholesalers reporting sales to BookNet. This table reports data on the sales of all titles published by Canadian-owned publishers, including both Canadian- and foreign-authored titles. The BookNet SalesData survey includes a high percentage of all retail sales in English in Canada, but it does not include Amazon.ca or Amazon.com and does not include many gift and craft accounts. Also not included are e-book sales. Consumer surveys do report on e-book purchases and reading, and these are a relatively small component of book sales in English Canada. E-book trade sales of Canadian-authored titles by Canadian-owned publishers are a very small percentage of total sales.

Charts 3 and 3A

Source: BookNet Canada SalesData. The BookNet database, which includes virtually all trade book titles sold by bookstores and wholesalers in English in Canada. The data reflects total numbers of ISBNs with publication dates during the 2017 calendar year and announced as available by their publishers or distributors.

Chart 4

Source: BookNet Canada SalesData, reporting on list value of unit sales from all retailers and wholesalers reporting sales to BookNet. The list price value of reported sales exceeds the actual retail sales value of these sales as a result of discounts offered to customers by retailers and wholesalers. This table reports data on the sales of all titles published by Canadian-owned publishers, including both Canadian- and foreign-authored titles. The BookNet SalesData survey includes a high percentage of all retail sales in English in

Canada, but it does not include most Amazon.ca or Amazon.com sales and does not include many gift and craft accounts or e-book sales.

Chart 5

Source: BookNet Canada SalesData report for new Canadian-authored titles published 1 March, 2017, to 28 February, 2018.

Chart 6

Source: BookNet Canada SalesData. This table reports trade book sales tracked by the SalesData service, and does not include book sales by non-reporting bookstores and other retailers, e.g., gift accounts.

Chart 7

Source: BookNet Canada SalesData, reporting on list value of unit sales from all retailers and wholesalers reporting sales to BookNet. Over the period of this table, the sample group grew significantly. The list price value of reported sales exceeds the actual retail sales value of these sales as a result of discounts offered by retailers and wholesalers. This table reports data on the sales of all titles published by Canadian-owned publishers, including both Canadian- and foreign-authored titles. The BookNet SalesData survey includes a high percentage of all retail sales in English in Canada, but it does not include Amazon.ca or Amazon.com sales and does not include many gift and craft accounts. It also does not include e-book sales.

Chart 8

Source: BookNet Canada SaleData, reporting on list value of unit sales from all retailers and wholesalers reporting sales to BookNet. Over the period of this table, the sample group grew significantly. The list price value of reported sales exceeds the actual retail sales value of these sales as a result discounts offered by retailers and wholesalers. This table reports data on the sales of all titles published by Canadian-owned publishers, including both Canadian- and foreign-authored titles. The BookNet SalesData survey includes a high percentage of all retail sales in English in Canada, but it does not include Amazon.ca or Amazon.com and does not include many gift and craft accounts. It does not include e-book sales. Note that Department of Canadian Heritage data on sales covers trade book sales (including e-books) plus sales of other categories of books including reference books and educational books, and they break down sales between Canadian-authored and other books published by Canadian-owned publishers.

Chart 9

Source: BookNet Canada. This data shows unit sales by Canadian-owned publishers to an unchanging sample of retailers and wholesalers (the “ring fence group”). By reporting on sales to an unchanging group of customers, these figures provide a clearer picture of changes in the role of Canadian-owned publishers in the retail book market during the time period 2009–2017.

Charts 10, 11, 12, and 13

Source: Canada Book Fund (CBF), Department of Canadian Heritage, reporting on data from all Canada Book Fund recipients in the relevant funding year. Data from CBF recipients provides the most comprehensive available statistics on the Canadian-owned book publishing industry. CBF eligibility requirements are such that most book publishers with significant commercial operations are fund recipients. Sales included in these CBF statistics include trade books, school and post-secondary textbooks, and other significant book genres. Print and e-book sales are both included. Note that BookNet Canada’s SalesData service reports only trade book sales in print format.

Chart 14

Source: Atlantic Publishers Association, Reader Survey, December 2017. Sample size was 400. Last-book-read data was provided by respondents, and analyzed by Mike Hamm of the Bookmark, Halifax.

Chart 15

Source: Noah Genner, BookNet Canada Presentation to Eastbound 2018 conference, Halifax, May 2018.

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