

Canadian books count...

A Study of the Ontario School Library and Public Library Acquisition Process

A Report Prepared for:

**The Organization of Book Publishers of Ontario
and
The Ontario Media Development Corporation**

By:



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POLLARA Inc. (<http://www.pollara.com>), the largest Canadian public opinion and marketing research firm, helps its clients improve their performance through strategic research designed and analyzed by consultants who are experts in their fields.

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I. Introduction

POLLARA is pleased to present to the Organization of Book Publishers of Ontario (OBPO) and the Ontario Media Development Corporation (OMDC) with the following report of findings from a study regarding Ontario Public Library and School Library purchases.

A. Background and Objectives

OBPO and OMDC commissioned POLLARA to conduct a study investigating the purchases and purchase decisions of Ontario's Public Libraries and School Libraries.

The RFP stated:

Over the past ten years, dwindling acquisitions budgets and library cutbacks, closures and staff reductions have had a dramatic effect on sales of Canadian books by Ontario book publishers to this market. In particular, children's book publishers have noted a significant decrease in library sales. This, coupled with a shrinking trade marketplace, proved deleterious for the growth of the domestic book publishing industry. There is a need to better understand how purchasing is done and how to market to decision makers in the library community.

OMDC and OBPO will use information gathered from this research to better target marketing approaches to the Ontario Public Library and School Library markets.

The research consisted of two phases. Phase 1 involved in-depth telephone interviews with key informants from Ontario library associations, relevant government ministries, and wholesalers and publishers who sell to Ontario Public Libraries and School Libraries. Phase 2 of the research was an online survey of these same libraries.

This report describes the findings of each phase in turn, and provides conclusions and recommendations based on the research as a whole.

Phase 1 Objectives

Phase 1 of the research had two principal objectives. The first was to gain a detailed understanding of the collection acquisition processes of Ontario Public Libraries and School Libraries including the factors that influence purchase decisions. The second objective was to gather respondents' input regarding Phase 2 of the research. It assessed the feasibility of the proposed Phase 2 methodology and sought ways to fine-tune the data collection instrument that will be used to collect information about libraries' recent acquisitions.

Phase 2 Objectives

This second phase consisted of an online survey of Ontario Public Libraries and School Libraries.

The objectives of Phase 2 were to collect information regarding:

- Sources of Ontario Public Library and School Library purchases
- Factors influencing book selection decisions
- Attitudes towards Canadian Books in Libraries
- Perceived barriers to having more Canadian authored books in libraries
- Factors that would encourage librarians to purchase more Ontario/Canadian content for their libraries
- Preferred communications channels to get information about Canadian books to library staff
- Aggregate Public Library and School Library purchase budgets, and breakdown by categories, for up to the last three years.

B. Methodology

Phase 1

A “top down” approach was used to develop the intelligence and data needed to meet the objectives of the study. Phase 1 of the research consisted of 22 in-depth telephone interviews with the following stakeholders:

Persons Interviewed	Number of Interviews
Key informants – Associations and other stakeholders	5
Key informants – Ministry of Culture	2
Key informants – Ministry of Education	1
Wholesalers	5
Publishers	9
Total	22

Each interview lasted between 20 and 70 minutes. The discussion guide was designed by POLLARA, in consultation with OBPO and OMD. The guide was tailored to the particular groups of respondents – publishers, wholesalers, library associations and government contacts.

A number of topics were covered during the interviews with the overall aim of understanding the collection acquisition processes of Ontario Public Libraries and School Libraries in terms of the following:

- Overview of the acquisitions process including differences between Public Libraries and School Libraries.
- Key factors that influence purchase decisions and title selection
- The role played by purchasing groups, collective purchasing agreements and wholesalers in determining title selection
- The priority that Canadian authors receive in acquisitions
- The overall percentage of current library collections that is Canadian-authored and whether this is tracked by libraries

- Whether the proportion of Canadian authored books in library collections increasing or decreasing
- What could be done to encourage libraries to purchase more Ontario or Canadian books
- The effect of budget cutbacks on the acquisition of materials for children.

Phase 1 of the research also assessed the feasibility of Phase 2 of the research (the online survey of Public Libraries and Public School Libraries in Ontario) and the best way to conduct it. Respondents were asked about:

- The feasibility of the proposed online methodology
- Ways to fine-tune the data collection instrument that will be used to collect information about libraries' recent acquisitions
- Who the key decision makers are within the Public Libraries and Public School Libraries who would best be able to complete the online survey.

Phase 2

The online survey questionnaire was designed by POLLARA in collaboration with OBPO and OMDC.

E-mail invitations were sent to potential respondents, including Librarians/Library Staff, Library CEOs, School Principals and Teacher-Librarians. Initial invitations were sent out on October 19, 2005 and the survey closed on November 30, 2005.

The following organizations assisted in distributing the survey:

- Southern Ontario Library Service (SOLS)
- Ontario Library Services North (OLSN)
- The Ontario Principals Council (OPC)
- The Catholic Principals Council of Ontario (CPCO)
- The Ontario School Librarians Association (OSLA).

All efforts were made to encourage participation in the survey. The e-mails contained a link to the online survey which respondents were asked to complete. Respondents were also given the option of completing the survey by fax, by mail or by telephone if they preferred.

A number of reminders were sent to participants in the interim. POLLARA staff assisted some of the respondents in filling out the survey and answering questions. Many of the larger Public Libraries were also contacted by telephone to encourage their participation in the survey.

In response to those efforts, and in spite of the fact that many libraries do not have easy access to the financial data requested as part of the survey, 434 completed surveys were received:

- 125 from Ontario Public Libraries - these respondents represent 70% of Public Library cardholders in Ontario
- 309 from Ontario School Libraries – 210 Elementary, 82 High Schools, and 17 Other.

II. Executive Summary

This study was conducted to gain an understanding of the collection acquisition process of Public Libraries and School Libraries in Ontario, gather information on acquisition budgets, assess the proportion of Canadian books in current library collections, and determine the factors that influence book selection decisions. In addition, attitudes towards Canadian books in libraries were examined, and ways to encourage librarians to buy more Canadian books were identified, as were perceived barriers to increasing acquisitions of Canadian books.

The study was conducted in two phases. In Phase I, 22 in-depth interviews were conducted with various industry stakeholders, publishers and wholesalers. In Phase II, an on-line survey of 434 libraries was conducted.

No Common Process

Study findings indicate that there is no common acquisition process among public and school libraries, making it difficult for the publishing industry to use a systematic approach to market to this community. The majority of public library and school library purchases, however, are made through wholesalers (or “jobbers”). Overall, public libraries purchase 81% of the total dollar value of their books from wholesalers, and school libraries purchase 57% through them. Librarians, pressed for time, often rely on the lists and catalogues that they publish. As a result, wholesalers play an important role in title selection and acquisition.

The Role of Wholesalers

Survey respondents acknowledged the importance of the role played by the wholesalers. They deliver two important benefits to under-staffed and under-budgeted libraries: the convenience of one-stop shopping and volume discounts – and convenience and price are of particular importance to smaller libraries. Most publishers also recognize the importance of the role played by the wholesalers and direct their marketing effort at them, in an attempt to ensure that their books are included in the wholesalers’ lists and catalogues.

By contrast, a few publishers still regard wholesalers and purchasing groups as functional vehicles to get the books from them to the libraries, while they are in fact an important player in the acquisition process. In some cases, particularly in smaller libraries, wholesalers will select the individual titles for entire categories of a library collection, or even a complete collection for a new library.

Factors that Influence Title Selection

Survey respondents ranked patron requests (public libraries) and curriculum connection (school libraries) as the most important factors driving their book selection decisions.

Awards and nominations, as well as book reviews, also play a significant role in influencing title selection. The Quill and Quire and the Globe and Mail are seen as important sources that librarians consult for book reviews. The Silver Birch Awards were frequently mentioned as being an important factor in title selection.

Clearly, members of the library community are very positive in their views of Canadian books and their importance. While it is “never the most important factor”, Canadian authorship, content, setting and themes are generally taken into consideration when librarians select books for their collections.

Lack of Awareness of Canadian Books and Canadian Authors

However, there is insufficient knowledge across the industry of which books and authors are actually Canadian. In spite of this low awareness of Canadian authorship, respondents have expressed a desire to select Canadian books for their library collections. They are of particular importance to school libraries, where curriculum dictates some Canadian content. Also, schools want the children to “*see themselves in the books they read*”.

Aside from budget cutbacks, the lack of awareness of Canadian books and authors combined with the difficulty in identifying Canadian authors was identified as the main barrier to increasing the number of Canadian authored books in library collections.

Need to Implement Measurement System

The majority of libraries do not currently track Canadian authored books in their collections. Indeed, in addition to the difficulty in identifying Canadian authored books, which in itself represents a major obstacle to acquiring more Canadian books, one of the problems with tracking and measuring Canadian authorship within current library collections is that there is no standard definition of what constitutes a Canadian author. This needs to be addressed before any measurement system can be implemented.

A common definition will also allow for better identification and focus on Canadian books in the marketing process.

Developing a tracking code, based on an industry definition of “Canadian books”, will be critical to the implementation of an ongoing measurement system of Canadian book sales. After facing a similar challenge, the television industry had to develop specific codes in order to track Canadian content. Television stations cooperated to jointly develop a definition and related codes that would allow the set up of a tracking system.

Publishers and wholesalers need to take a similar approach to develop a common definition of what the industry considers to be a “Canadian book”. This will allow them to develop a code to enable publishers and wholesalers to track all sales of Canadian books. Inventory and shipping software programs should be adapted accordingly to flag Canadian books, using this code, throughout the acquisition and cataloguing process.

Encouraging Librarians to Buy more Canadian Books

Respondents’ suggestions on ways to encourage librarians to purchase more Ontario and Canadian authored books were consistent with the perceived barriers identified in the survey. The measures thought to be most effective revolve primarily around raising awareness of Canadian authored books, and making those books easier to find and identify. They also suggest that increased library budgets and government grants aimed at the specific purchase of Canadian books would also contribute to raising Canadian content in library collections. Over half the respondents, however, rejected the proposal of “*government guidelines requiring libraries to allocate a certain percentage of their budget to Canadian publications*”.

Library Purchases

While librarians often do not have easy access to financial data, and many found it difficult to provide a breakdown of their budget for library purchases, particularly in terms of the proportion of Canadian content, the financial data collected provides a solid estimate of total spending, especially in the public library sector. In total, 309 School Libraries and 125 Public Libraries responded to the online survey – the 125 public libraries that responded represent 70% of Ontario active library cardholders.

Based on the findings from the survey, we can estimate total public library expenditures on materials in 2004 to be \$57,378,620.

In order to further confirm our estimate of total spending among public libraries, we compared it to two other sources. First, we found that this amount is in line with the results from the 2003 Ontario Ministry of Culture Libraries Survey in which Ontario libraries had total library materials

expenditures of \$54,001,808. We also compared the total estimate to a third amount calculated using information provided by wholesalers, which provided an estimate of approximately \$56,500,000.

With regards to school libraries, we found it more relevant to calculate an estimate of materials expenditure per student, rather than extrapolate to the entire market from the partial financial information provided. The average per student spending is estimated to be \$13.03 per student.

As can be expected, given the lack of awareness of Canadian authors mentioned earlier, close to half of the respondents could not indicate the percentage of Canadian authored books in their collection. Among those who provided an answer to this question, the average percentage is estimated to be 26% among public libraries and 34% among school libraries.

Communicating with Librarians

Librarians would like information about Canadian books to be communicated to them in a number of ways. While there is no consensus regarding a preferred method, electronic means such as email and Internet were most frequently mentioned, including monthly emailed newsletters distributed through library service listserves and other similar services. General media, book reviews and journals are also a good source.

In its communications efforts, the publishing industry might want to emphasize the concepts that received the strongest agreement scores from survey respondents. The librarians most strongly agree that it is important “*to have Canadian books in libraries*” and “*to encourage the writing and publishing of Canadian books*”. Clearly, support for authors and creators would be viewed very positively. Agreement was not as strong with statements referring to “*Canadian values*” and to those values being different and being reflected in our books.

Recommendations

Based on the findings of the study, we would recommend that the following initiatives be undertaken to encourage librarians to buy more Canadian books, and to assist the industry in measuring sales of Canadian books:

- As mentioned earlier in this summary, one of the priorities is to first develop an industry-accepted definition of what constitutes a Canadian author – Is it someone who was born in Canada? Someone who lives in Canada? Someone who is published by a Canadian publisher? (For example, one of the wholesalers said that they measure Canadian

authorship using a set of criteria such as Canadian Publisher, Canadian Author, Canadian Illustrator and Canadian Content. If the book satisfies at least two of these criteria, it is considered Canadian.) Publishers and wholesalers need to cooperate to develop this definition.

- Once a definition of “Canadian book/author” has been agreed to, a process needs to be initiated to systematically track sales of Canadian books throughout the acquisition and cataloguing process. Publishers’ and wholesalers’ inventory and shipping software programs should be adapted to include a “Canadian code” developed from the definition, to flag all Canadian sales at the distribution point. The detailed description of books provided at the source (ISBN, etc.) could also include this Canadian code so that it would be tracked through the entire selling and cataloguing process by publishers, wholesalers and librarians.
- Increased marketing and promotional efforts focused specifically on Canadian titles:
 - marketing efforts aimed at increasing awareness of Canadian authors should target all the various decision-makers and influencers, including librarians and other library staff, CEO’s of public libraries, school principals, wholesalers and distributors, as well as the general public – *“more marketing aimed at readers and clientele...”, “higher profile would lead to more patron requests”*
 - provide libraries with materials that can be immediately used as promotion to increase awareness among their readers (free posters, bookmarks, etc.)
 - because of the importance of word-of-mouth in marketing books to librarians, *“creating a buzz”* is key – through promotional activities and getting positive reviews that will get people talking
 - assist libraries in arranging author visits
 - make more information and reviews about Canadian books available on the Internet
- Make it easier to identify Canadian books – identify books more clearly in showrooms and catalogues. Aside from offering separate sections exclusively for Canadian books, this could be done by adding a (maple leaf) logo to the publications and on the books themselves to clearly identify books as Canadian. Relevant websites could also include a

“Canadian books” button on which users could click for information specific to Canadian books.

- Provide libraries with resources that will help them identify and track Canadian authorship. This could include making available stickers of the logo mentioned above, to be affixed directly on Canadian books so that library staff and readers will immediately know that a book is Canadian. In addition, software programs that will facilitate tracking Canadian content in their collections might be developed to assist libraries.
- To increase marketing efficiencies, encourage and help publishers to communicate and promote electronically. As a marketing tool, the medium is relatively new for many. Provide support and training for publishers on how to use the Internet effectively to communicate, promote, and to bring members of their target markets (librarians, general public, etc.) to visit their websites.
- Create a “one-stop service”, preferably on-line, that would allow librarians to source Canadian material, get the information they need to make a purchasing decision (including ISBN and all publisher/wholesaler ordering information, etc.), order, and even pay online – all in one easy visit to a single website with appropriate links.
- School libraries would like to see more books that relate to their curriculum so they don’t have to buy American books to fill the needs. Curriculum-related content should also be clearly identified: web sites should be searchable by curriculum areas and grade levels, as well as titles, authors, etc.
- Ensure that books and their covers are attractive – *“kids DO choose books by their covers”, “paperback novels are a ... hard sell to students at the junior/intermediate level...”*
- Support a continuing positive collaboration between wholesalers and publishers.

III. Phase 1 – In-Depth Interviews With Key Informants

The following section summarises the findings of the in-depth interviews conducted by POLLARA.

A. The Purchasing/Acquisition Process

Respondents were first asked to describe their understanding of the purchasing/acquisition process in Ontario Public Libraries and School Libraries.

The overall opinion is that there is no common process for purchasing/acquisitions in the library community. Differences exist between the ways that Public Libraries and School Libraries operate and between the ways that individual libraries operate within each of these two groups when it comes to purchasing.

Most publishers and wholesalers indicated that both Public Libraries and School Libraries spread their purchases throughout the year, rather than having one single order for the year, although the volume of purchases does vary according to the budget cycle. One publisher said that School Libraries tend to order once or twice a year, when the budgeted funds come in - usually around April.

Public Library Acquisitions

Respondents indicated that for Public Libraries, the acquisitions process, including the decisions of what titles to select, is most often conducted at the library rather than at the branch level. There are exceptions to this rule, but respondents said that it varies from library to library and is not dependent on the size of the library or on the number of branches.

Larger libraries with more staff will often have a selection committee or technical services department responsible for acquisitions. In the biggest libraries, the departments will also have higher-level positions that are responsible for coordinating specific service/collection areas. For instance they might have a Child and Youth Advocate who would select titles for the children's collections. Smaller libraries have far fewer staff – in some cases only a handful – who will perform a number of different functions

within the library. For instance, the library CEO might also be responsible for acquisitions.

School Library Acquisitions

Respondents reported that the acquisitions process varies greatly between different schools and school boards. In some boards, title selection is done centrally at the board level, while in others – particularly the smaller boards - decisions are left up to individual school librarians. If a school does not have a librarian, it is sometimes the school principal or a library technician who purchases the books.

In some cases, even in boards where the majority of purchasing is done at the individual school level, the school board may occasionally place a bulk order for a particular book and will then distribute copies to all the schools in the board. These variations in the acquisition process between schools and boards mean that it is difficult even for publishers and wholesalers to know whom to approach with marketing materials.

Wholesalers indicated that some school boards have contracts with certain wholesalers while others do not. Some have approved vendors' lists and if a wholesaler is on the list, the teachers and teacher librarians can purchase from them. In some cases the teachers have to get a quote before making a purchase, in other cases they do not.

Sources of Books

Respondents in all groups (publishers, wholesalers and key informants) report that the majority of both Public Library and School Library purchases are now made through wholesalers (also known as “jobbers”) and distributors. Ontario School Libraries purchase almost exclusively through wholesalers, while Ontario Public Libraries tend to buy the bulk of their books from distributors and wholesalers. Only a very small proportion of books are now purchased direct from the publisher or from books stores.

Although none of the respondents were able to say exactly how much is purchased through wholesalers and distributors, many estimated it to be between 70% and 90%. One publisher thought that 99% was bought through wholesalers while another thought that 100% of Public Library purchases and 80-90% of School Library purchases were made through wholesalers.

A few publishers said that they do still market directly to School Libraries and Public Libraries, but very rarely sell to them directly. Most of their effort is now directed towards building relationships with and marketing to

the wholesalers in the hope that the wholesaler will add their books to their catalogues.

Publishers find it easier to market to the libraries and boards that have central buying systems. One publisher indicated that it is much more difficult to market to smaller rural libraries. The main way for publishers to reach these smaller libraries is to have their books featured in reviews on the Internet or in professional journals.

While libraries still represent an important market for the publishing industry, many respondents felt that School Libraries and, to a lesser extent, Public Libraries, are buying in smaller quantities than before. One of the publishers said, *“Years ago what would have happened is that the library system would buy a copy for each one of its branches... Now they’ll buy three copies and they rely on the interlibrary loans to distribute it.”*

One wholesaler said that the total Public Library market for a title in Ontario is in the dozens or hundreds - even in the case of Harry Potter, libraries only purchased a thousand copies that were shared among libraries.

Effect of budget cutbacks on children’s books

Publishers indicated that, while the quality and selection of children’s books published has greatly increased over the last several years, budget cutbacks have had a particularly severe effect on the acquisition of material for children. A few publishers refer to this situation as having very “negative consequences”. According to some, this is not a recent phenomenon – they said that it has been happening for the last 10-15 years.

Many felt that budget cutbacks have been more severe in School Libraries than in Public Libraries. A few said that in Public Libraries, budget cutbacks have often affected staffing levels rather than materials budgets.

Not only have budgets been reduced overall, children’s books also have to compete for funds against other library purchases such as electronic and multimedia resources. One publisher said that in the past, out of a print run of 4,000 to 5,000 picture books, 1,500 to 2,000 would be going to libraries, whereas they are now lucky to sell 600-800 copies to them.

A few people mentioned that libraries now tend to buy paperback books rather than hardbacks and one publisher said that some teachers are even paying for books out of their own pockets.

B. Key Factors Driving Title Selection and Purchase Decision

In order to gain an understanding of how libraries choose particular titles for their collections, respondents were asked about the key factors that influence the purchase decision and title selection.

Overall, it was felt that patron requests were the main factors influencing title selection in Public Libraries while the majority of respondents thought that curriculum driven content was the most important factor for School Libraries.

Book reviews and awards are thought to play a significant role for both Public Libraries and School Libraries, as do wholesaler suggestions either through their lists and catalogues or through in-store staff recommendations. Unprompted, a few wholesalers and key informants said that Canadian content was also a factor in title selection for both Public Libraries and School Libraries.

In addition, Public Libraries are believed to be concerned with having a comprehensive and diverse collection whereas respondents felt that School Libraries purchase decisions are driven more by the price of the books and ease of ordering and availability.

The following tables list respondents' perceptions of key factors that influence title selection and purchase decisions in order of importance.

Key Factors in Title Selection and Purchase Decision –

WHOLESALEERS' PERCEPTIONS

Public Libraries	School Libraries
Patron requests	Curriculum connection
Wholesaler lists/recommendations	Wholesaler lists/recommendations
Meet needs of collection	Book reviews and awards
Book reviews and awards	Price
Canadian content	Attractiveness of covers
Curriculum connection	Canadian content

Key Factors in Title Selection and Purchase Decision –

PUBLISHERS' PERCEPTIONS

Public Libraries	School Libraries
Patron requests/popularity	Curriculum driven/content
Book reviews & awards	Book reviews & awards
Author name recognition	Teachers' requests
Wholesaler lists	Catalogs/lists/visits from wholesalers and distributors
Ensuring that they have wide ranging collection/Subject matter	Student requests
Relevance to curriculum	Ease of ordering; one-stop-shopping
	In stock/No delay/Time saving
	Price

Key Factors in Title Selection and Purchase Decision –

KEY INFORMANTS' PERCEPTIONS

Public Libraries	School Libraries
Patron requests/Popularity	Price/Discounts
Community/Collection needs	Availability/Materials in stock
Current materials	Relevance to curriculum
Wholesaler recommendations	Wholesaler suggestions
Book reviews	Unbiased/Balanced collection
Latest Canadian materials	Canadian content
Ease of ordering	Good layout

Libraries receive catalogues from distributors and wholesalers and consult book review in journals and newspapers on a regular basis. Many respondents mentioned the Quill and Quire and the Globe and Mail as important sources that librarians consult for book reviews, although one publisher thought that the Quill and Quire was aimed more at the publishing industry and was less likely to be read by teachers.

Many of the journals and newspapers which librarians consult for book reviews are American, though some are Canadian.

Other sources, in addition to the Quill and Quire and the Globe and Mail, mentioned by respondents include:

- The School Library Journal
- Voice of Youth Advocates
- Canadian Children's Book Centre Book News
- Publishers Weekly
- Kirkus Review
- New York Times
- McLeans
- American Publishers' Weekly
- Sleuth of Baker Street
- Web Reviews on Amazon, Indigo and Chapters sites.
- Lists published by the American Libraries Association

One of the key informants said that Public Libraries sometimes perform a Situational Analysis in order to formulate their collection development policies. This situational analysis enables libraries to determine what is needed in their communities. They use census data to gain an understanding of the community's composition and what their needs are.

Public demand is thought to play a greater role in the selection of fiction books while the choice of what non-fiction books to order is more often based on what the library currently has in its collection and which areas need more materials. One of the wholesalers indicated that for some libraries, title selection for certain categories of books – such as picture books – is decided by the vendor rather than by the library.

Although respondents felt that patron requests play a big role in Public Libraries' book purchase decisions, one publisher felt that the factors that influence purchase decisions sometimes change over time. At one time, the library might be more concerned with building a collection of books that is varied, well rounded and a good reflection of what is published, while at

another time (maybe as readership drops) they may place a greater emphasis on ordering more popular titles.

School Libraries are generally not as well funded as Public Libraries. Many School Libraries are staffed by clerical staff who do not have the benefit of the Teacher Librarians' background and professional training when making title selections. This impacts on the factors that drive the selection process.

School libraries are thought to be more likely than Public Libraries to select books based on book reviews and awards or their relevance to the school's curriculum. Many respondents mentioned the Tree Awards for children's books (such as the Silver Birch Award in Ontario) as being an important factor in title selection. Schools are much more likely to order a book if it has won one of these awards.

Some schools and big boards set up display events (like book fairs) and invite book vendors to participate. Some publishers and wholesalers send boxes of books to schools and the schools choose and keep what they want. This has advantages with regards to time savings and pre-selection but it also offers a limited choice and the costs are higher.

C. The Role of Wholesalers and Other Bulk Purchasing Groups

Interviewees were asked about the role that wholesalers, purchasing groups and collective purchasing agreements play in determining title selection.

Almost all respondents agreed that wholesalers and other bulk purchasing groups play an important role in influencing title selection because librarians, pressed for time, often rely on the lists and catalogues that they publish – *“They don’t decide the philosophy of the purchasing libraries, but they make individual title selections based on what the libraries instruct them to do.”* By contrast, some publishers regard wholesalers and purchasing groups as functional vehicles to get the books from them to the libraries.

Respondents indicated that many libraries will present the wholesaler with a budget for various categories of books and will rely on the wholesaler to select titles to fill those categories. For example, they might tell the wholesaler that they have X amount of dollars to spend on their history or politics sections and the wholesaler will choose titles to meet that budget. As one publisher said, *“Increasingly, what’s going on is the librarians... they’re not even interested in the names of the books or the titles. They have to fill these sections and so they leave it up to the wholesalers to figure out what’s the hottest and latest book that they should be purchasing.”* In some cases, wholesalers will provide a new library with a complete collection.

Respondents felt that wholesalers play a more important role in title selection for smaller Public Libraries (which have few staff) than for larger libraries that have a staff dedicated to collection development.

One publisher thought that these groups impact the decision of whom the libraries will do business with, as well as what titles they will buy. Buying through wholesalers means that libraries can buy from different publishers and benefit from the convenience of one-stop-shopping and volume discounts. These are two important benefits driving the purchase decision, particularly because staff cutbacks in the library community mean that libraries are less likely to have a member of staff dedicated solely to acquisitions.

Wholesalers do not just sell the books to the libraries; they can also offer additional processing services. For instance, they can put the books in

dust jackets with security strips and bar codes so that they are ready to be put on the library bookshelves right away. They can provide the library with electronic cataloguing records that can be loaded into the library's database. These additional services are particularly useful for those libraries with fewer staff that would not have the time to do these things themselves.

Wholesalers indicate that School Libraries are more likely to rely on them to select titles than Public Libraries. Many School Libraries, particularly those without teacher librarians do not have sufficient knowledge of the materials that are available and rely on the knowledge and expertise of staff from the wholesalers.

One key informant said that School Library staff like to “*see and feel*” books before buying, rather than simply ordering through a catalogue. They will often go to wholesalers' showrooms and choose items from the shelves. The wholesalers have special themed displays and books are organized by topic and by grade level. This makes the selection process much easier for teachers and librarians who would otherwise lack the time or training to choose appropriate titles.

A few publishers expressed concern about the role played in the industry by wholesalers. They are perceived by some to be reactive in that they do not “market” the books but respond to the expected needs from their client base. They felt that no judgment is made on the quality of a book before it is included in the wholesalers' lists. An award or a good review will act as a trigger for a book to be added to the list.

Although publishers are expected to give a discount to wholesalers, most seemed to accept this as a standard part of business and only one publisher felt pressured by them. The discounts are well established and wholesalers do not pressure publishers to increase them. However, they do acknowledge that the discounts have affected their revenues.

On the other hand, there were mentions by wholesalers that they are, to some extent, “*subsidizing*” Canadian books, since it would usually be less expensive to simply buy from U.S. sources that offer larger discounts.

D. Canadian Authorship

Interviewees were asked a number of questions relating to Canadian authored books in libraries including:

- Do you think that the fact that an author is Canadian is considered in a librarian's decision to acquire a title?
- What would you estimate to be the overall percentage of the current library collections that is Canadian-authored?
- Do you think that the proportion of Canadian authored books in library collections is increasing or decreasing and, if so, why?

Almost all respondents felt that both Public Libraries and School Libraries do consider the fact that a book is Canadian authored when deciding whether to acquire a particular title. While the fact that an author is Canadian is never the most important factor in the decision to acquire a title (a book must meet other criteria first) it is taken into consideration.

Respondents indicated that Canadian authorship is particularly important in School Libraries, primarily because the curriculum dictates some Canadian content. As a result, Canadian authorship is "*extremely important*" in subjects such as geography, history and other social sciences. One key informant gave the example of maths books that would have exercises that make use of the metric system rather than the U.S. imperial system. In addition, Canadian authorship is considered more important in children's fiction and picture books because the schools want the children to "*see themselves in the books they read.*"

However, although respondents think that Canadian authorship is considered important, many feel that there is insufficient knowledge, particularly within School Libraries, about which books and authors are Canadian. This is especially true of School Libraries that do not have teacher librarians.

A few respondents indicated that Canadian authorship might not be as important to Public Libraries. They are thought to choose many of their titles based on popularity and Canadian authorship is not something that is considered important by patrons. However it was felt that, all things being equal, Public Libraries would select a Canadian authored book first, particularly in subject areas such as law or accounting where Canadian content is more relevant.

There was no consensus among interviewees regarding whether they thought libraries specifically track Canadian authored books in their collections. While some thought they would have it as a field in their MARK records, others did not. Respondents felt that Public Libraries were more likely to track Canadian authored books than School Libraries.

One of the problems with measuring Canadian authorship is that there is no standard definition of what constitutes a Canadian author – someone who was born in Canada? Someone who lives in Canada? Someone who is published by a Canadian publisher? One of the wholesalers said that they measure Canadian authorship using a set of criteria such as Canadian Publisher, Canadian Author, Canadian Illustrator and Canadian Content. If the book satisfies at least two of these criteria, it is considered Canadian.

Many in the industry feel that no one knows what the overall percentage of Canadian authored books is in current library collections. In fact, librarians and the publishing industry itself often do not know which authors are Canadian. Many respondents were unable to provide even a “guesstimate” of the proportion of books in library collections that are Canadian authored. One publisher thought it was about 25% Canadian while another thought it was as high as 60%. A wholesaler thought it was about 30% whereas one of the key informants thought it was somewhere in the region of 3% to 5%.

Similarly, respondents were uncertain whether the proportion of Canadian authored books in library collections is increasing or decreasing, though they were more inclined to feel that it is increasing than decreasing. One publisher said this is because awareness of Canadian books – particularly children’s books is being raised through book reviews and awards, while a wholesaler felt that the quality of Canadian books has increased.

However, while some think that the proportion of books in library collections that is Canadian authored is increasing, they also believe that the total number of books being purchased by libraries is decreasing because of budget cutbacks.

E. Encouraging Librarians to Purchase More Canadian Books

Respondents were asked what could be done to encourage librarians to purchase more Ontario and Canadian authored books. The solutions they suggested fell into four main areas:

- Raise awareness of Canadian authored books
- Increase library budgets (or require a proportion of funding to be spent on Canadian authored books)
- Make Canadian authored books easier to find/more readily available
- Continued improvement in the quality of Canadian authored books.

Some publishers thought that librarians would only purchase more Ontario or Canadian authored books if their budgets were increased. Many respondents felt that libraries would like to purchase more Canadian materials but they are unable to do so because of lack of funds. A few said that Canadian books are often more expensive or less heavily discounted than their American counterparts.

One wholesaler expressed disappointment that when the Ministry of Education gave out money to schools, there were no criteria requiring them to spend money on Canadian books. One of the key informants suggested that there should be government funded grant programs specifically to help libraries purchase Canadian authored books.

Others thought that libraries would purchase more Canadian authored books if librarians and school staff had a greater awareness of what Canadian authored books are available. They felt that librarians should be provided with more marketing material focused specifically on Canadian titles. Respondents feel there is a need for more communication to create links and inform people, particularly within school libraries, about which authors are Canadian. A few suggested that Canadian books should be more clearly identified in showrooms and in catalogues.

A publisher said that one of the biggest factors in the marketing of books to librarians is word-of-mouth, so “*creating a buzz*” is key, through promotional activities and getting positive reviews, etc. One of the publishers felt that newspapers such as the Globe and Mail could play a role by devoting more of its book reviews to Canadian authored books.

Some respondents felt that publishers and distributors are already working to promote Ontario and Canadian authored books. For instance, one key informant mentioned that there was a booth at the Ontario Library Association Conference where Ontario magazines, digital media, and book publishers could promote Ontario products to Ontario Public Libraries.

A few publishers believe that communicating and promoting electronically will be "*the biggest way*" to achieve success. They are still trying to find out how to "*plug in*" to this relatively new medium, but the movement to communicate via Internet is considered to be critical. For example, publishers are creating teachers' guides to get teachers to visit their web sites, and they are encouraging authors to create their own web sites.

School visits by authors are also an important, but labour intensive, method of increasing awareness.

A few felt that Canadian authored books need to be easier to obtain. This includes making sure that they are in stock and not out of print. One of the publishers said that school librarians in particular find it hard to source Canadian material and that they would like to be able to look in just one place rather than in a variety of journals and newspapers. They thought it would be good if there were an online service that listed all Canadian authored books sorted by category.

Others believed that if the quality of Canadian books (good stories, well written, good illustrations) continued to increase, libraries would buy more of them. Indeed some indicated that this is already happening.

One of the wholesalers said that publishers might be reluctant to publish books that are too Canadian specific because they would be unlikely to sell in the U.S.A.

F. Reactions to Proposed Online Survey for Phase 2

One of the objectives of Phase 1 of the research was to assess the feasibility of Phase 2 – an online quantitative survey of Public Libraries and School Libraries in Ontario. In Phase 2, Public Libraries and School Libraries will be e-mailed a link to an online survey in which they will be asked questions relating to their collection purchases. As part of this online survey they will be asked to provide financial information about their libraries' purchases in each of the last three years broken down by category.

Respondents in Phase 1 of the research were asked if they felt that the online methodology was suitable for librarians, whether libraries would have access to the financial data requested and whether the libraries would be willing and able to share it. Respondents were shown the proposed form to be used for collecting financial information about acquisitions and were asked for suggestions on how to improve it. To ensure that the right people within the libraries are targeted, and to maximize the response to the online survey, interviewees were also asked whom the survey should be sent to within the Public Libraries and School Libraries.

Respondents believed that an online methodology is appropriate for the survey. They felt that the majority of librarians are computer-savvy and that they would be comfortable completing the survey online. However one respondent thought that school staff might be less computer literate than librarians in Public Libraries.

Interviewees did not think that there would be any confidentiality issues that would prevent libraries from completing the online survey. Because Public Libraries and School Libraries are publicly funded organizations, the information requested was not considered to be confidential.

When asked if libraries would have easy access to the type of data being requested, one of the key informants stated that many Public Libraries, particularly in Northern Ontario, are not fully automated and that they will have to consult their card catalogue rather than an online database of their collection. One publisher thought that in some Public Libraries, it might be necessary to consult both the acquisition and the purchasing departments.

Since there was no consensus on the degree to which libraries track acquisitions by Canadian authors, respondents were unsure if libraries would be able to provide the breakdowns of acquisitions of Canadian

authored materials. Once again, a few respondents stressed the difficulty of even defining what constitutes Canadian authored materials.

One of the key informants was concerned about how quickly libraries would respond to the survey. They said that Public Libraries are given three months to complete the Ministry of Culture's annual survey and, even then, many do not return their questionnaires before the deadline.

Because the acquisition process varies so much from library to library and from school to school, it is not easy to determine to whom the surveys should be sent. This is a problem that publishers and wholesalers also face when targeting their marketing campaigns.

For Public Libraries, respondents generally agreed that the survey should be completed at the library level rather than at the branch level. It was suggested that the survey be addressed to the library CEO/Library Director.

For School Libraries it was suggested that the survey should be addressed to the School Principal with a note asking them to forward it to the Teacher Librarian, if applicable.

Based on suggestions provided, the financial information section of the online survey includes:

COLLECTION PURCHASES 2004/05 FISCAL YEAR				
		<i>TOTAL</i>		HOW MUCH OF THE TOTAL IS CANADIAN-AUTHORED? <i>(IF POSSIBLE)</i>
		Number of Titles	Total Expenditure	Number of Titles
			\$	Total Expenditure
				\$
TOTAL EXPENDITURES				
BOOKS SUBTOTAL				
Of Which	Adult fiction		\$	\$
	Adult reference		\$	\$
	Adult non-fiction (excludes reference)			
	Adult poetry, drama		\$	\$
	Children's picture books – ages 4-8		\$	\$
	Children's fiction, other – ages 7-12		\$	\$
	Young adult fiction – ages 12+		\$	\$
	Children's and young adult reference		\$	\$
	Children's non-fiction (excludes reference)		\$	\$
	Young adult non-fiction (excludes reference)		\$	\$
	Young adult graphic novels		\$	\$
E-BOOKS				
AUDIOBOOKS				
SOFTWARE AND SOFTWARE LICENCES (e.g., on CD Rom, network) SUBTOTAL				
Of Which	Games		\$	\$
	Educational		\$	\$
FEATURE FILMS, SHORTS AND TV PROGRAMS (eg., on DVD, VHS) SUBTOTAL				
Of Which	Adult		\$	\$
	Children's		\$	\$
MUSIC				
PERIODICALS (Print and digital formats)				

IV. Phase 2 – Online Survey

The following section summarises the findings of the online research conducted by POLLARA. The report looks at the survey results broken down into six categories, defined as follows:

- Ontario Public Libraries Overall (n=125)
 - Smaller Ontario Public Libraries (Those serving a population of 100,000 or fewer)
 - Large Ontario Public Libraries (Those serving populations of more than 100,000)
- Ontario School Libraries Overall (n=309)
 - Smaller Ontario School Libraries (Schools with 1000 students or less)
 - Larger Ontario School Libraries (Schools with more than 1000 students)

The Public Libraries that responded to the POLLARA survey represent 70% of Ontario active library cardholders. While School Libraries generally found it more difficult to provide the information required in the survey, 309 submitted their responses, including 210 Elementary, 82 High Schools and 17 Other Schools.

As the views of each category of respondent are compared throughout this report, differences are mentioned where they apply. It is worth noting that the different views reported by respondents from small and large libraries are also indicative of the different staff composition of each group. Indeed, larger libraries have more staff and more trained Librarians than do smaller libraries, which are often operated by part-time or volunteer staff.

A. Sources of Collection Purchases

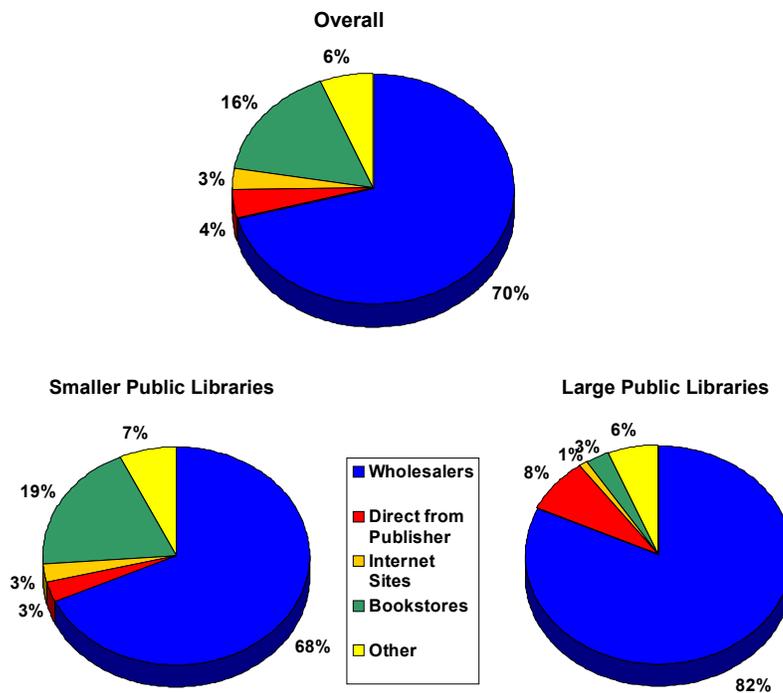
In order to gain an understanding of the buying process, respondents were asked for a breakdown of the sources of their collection purchases. The high proportion of respondents who report using wholesalers highlights the importance of the role they play in the overall buying process.

Public Libraries

Indeed, public libraries make, on average, almost three-quarters (70%) of collection purchases through wholesalers. Bookstores are a source of 16% of purchases compared to 4% direct from publisher and 3% from Internet Sites. Other sources that make up the remaining 6% of collection purchases include: retail/variety stores, direct from author, second hand bookstores, donations and book clubs.

Large public libraries indicate that they make a greater proportion of their collection purchases from wholesalers (82%) and direct from publishers (8%) than do smaller libraries (68% and 3%). Smaller libraries make a much larger proportion of their purchases from bookstores than do the large libraries (19% vs. 3%).

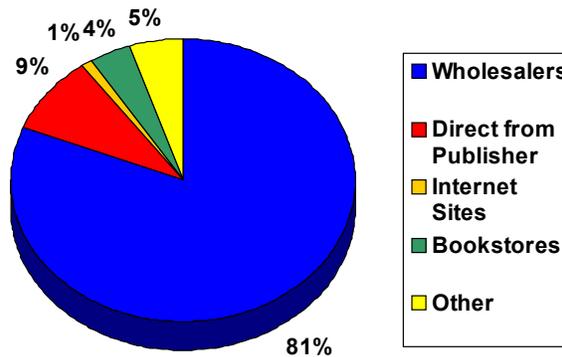
Sources of Public Library Collection Purchases



Q. Approximately what percentage of your collection purchases are made through the following sources?

To also gain an understanding of the total dollar value of purchases being made from each of the sources, the expenditure of each library needs to be taken into account. Weighting the data by each library's total materials expenditure for 2004 yields the following distribution of purchase sources.

**Sources of Overall Public Library Collection Purchases
(By Total Expenditure on Materials in 2004 Fiscal Year)**

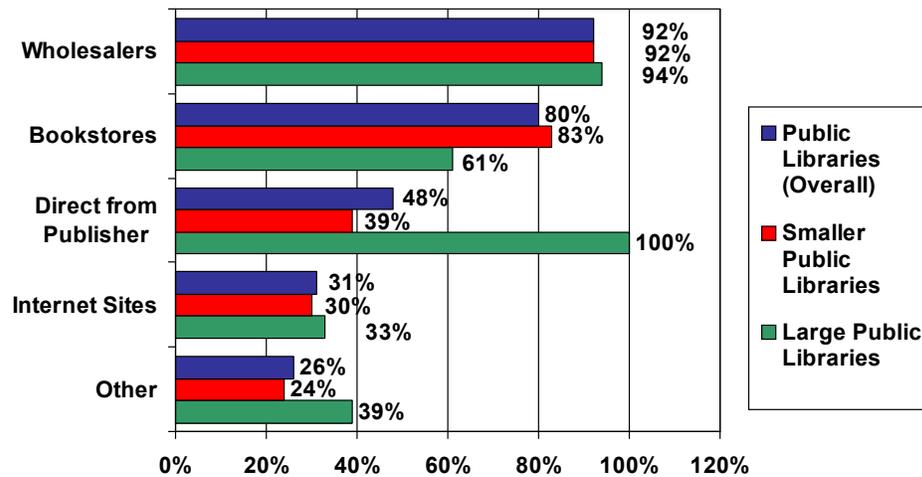


Q. Approximately what percentage of your collection purchases are made through the following sources? (WEIGHTED BY 2004 Dollar Amount of Total Materials Expenditures n=98)

This breakdown indicates that wholesalers are the source of 81% of the dollar value of Ontario Libraries' collection purchases and publishers 9%. Bookstores only account for 4% of the dollar value of purchases while Internet sites make up 1%.

Finally, the following chart shows that 92% of Ontario Public Libraries purchase at least some of their materials from wholesalers, 80% buy at least some from bookstores, 48% direct from publishers, 31% from Internet Sites, and 26% buy at least some of their materials from other sources.

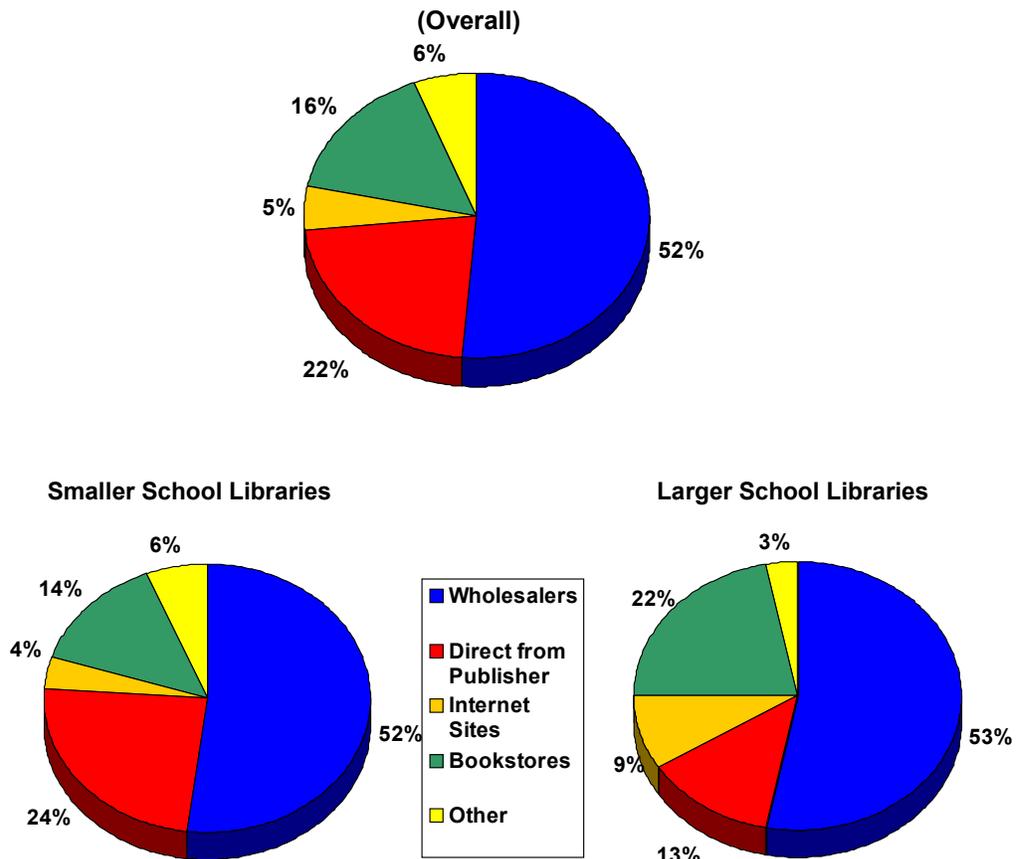
Percentage of Ontario Public Libraries Acquiring Any of Their Collection Materials from the Following Sources



School Libraries

School libraries purchase a smaller proportion of their books from wholesalers (53%) than do public libraries (70%). It is interesting to note that larger schools make a greater proportion of their purchases (22%) from bookstores than do smaller schools (14%) while the smaller schools report purchasing a greater proportion directly from the publisher (24% vs. 13%).

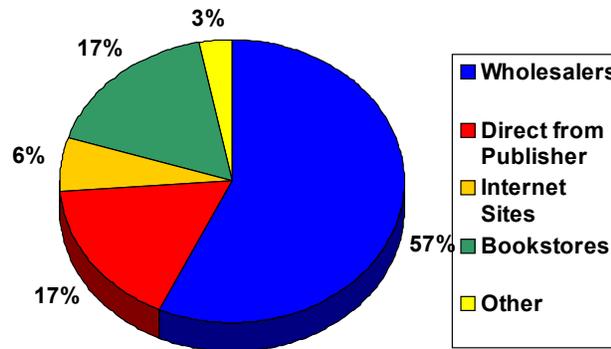
Sources of School Library Collection Purchases



Q. Approximately what percentage of your collection purchases are made through the following sources?

Weighting these figures by the School Libraries' total materials expenditure for 2004 to reflect the relative volume of purchases made by each school library yields the following distribution of purchase sources.

**Sources of Overall School Library Collection Purchases
(By Total Expenditure on Materials in 2004 Fiscal Year)**

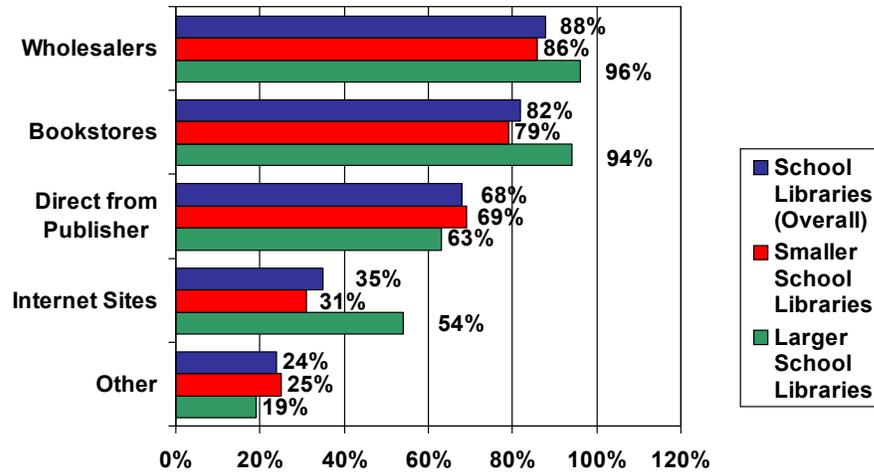


Q. Approximately what percentage of your collection purchases are made through the following sources? (WEIGHTED BY 2004 Dollar Amount of Total Materials Expenditures n=109)

Weighting the data like this indicates that wholesalers are the source of 57% of the dollar value of School Libraries' collection purchases and publishers 17%. Bookstores also account for 17% of the dollar value of purchases while Internet sites make up 6%.

The following chart shows that 88% of School Libraries purchase at least some of their materials from wholesalers, 82% buy at least some from bookstores, 68% direct from publishers, 35% from Internet Sites and 24% buy at least some of their materials from other sources.

Percentage of School Libraries Acquiring Any of Their Collection Materials from the Following Sources



B. Factors Influencing Book Selection

Respondents were presented with a list of factors and were asked to indicate whether each one influenced their libraries' book selection decisions "strongly", "somewhat", or "not".

Public Libraries

Public Libraries indicate that requests from patrons and staff have the greatest influence on their book selection decisions. The fact that a book is "Canadian", as well as book awards, nominations and reviews also strongly influence their book selection.

Book awards, nominations and reviews are much more important to large public libraries than they are to the smaller ones, as are Canadian authorship and content.

Overall, 82% of respondents said that patron requests strongly influence the book selection decisions and 18% said they somewhat influence the decisions. Staff requests also play an important role in influencing book selection decisions. 58% of respondents said that these strongly influence book selection and 35% said they somewhat influence it.

Libraries also select books based on awards and nominations (54% strongly influence, 45% somewhat influence) and book reviews (50% strongly influence, 44% somewhat influence).

As mentioned earlier, large libraries are much more likely to consider these latter factors than smaller libraries, with 83% of large libraries indicating they were "strongly influenced" by book awards and nominations, compared to 49% of smaller libraries, and 67% of large libraries vs. 48% of smaller ones saying they are "strongly" influenced by book reviews.

Respondents also consider whether the book is Canadian authored (55% strongly influence, 42% somewhat influence) or whether it has Canadian content, settings and/or themes (50% strongly influence, 49% somewhat influence). The fact that the book is illustrated by a Canadian also has an impact on the selection decision (30% strongly influence, 54% somewhat influence).

The fact that a book is "Canadian" bears more weight in the book selection decisions of large libraries than it does in smaller libraries. While 67% of large libraries report being "strongly" influenced by the fact that an author is Canadian, 53% of smaller libraries feel the same way. And while 67% of

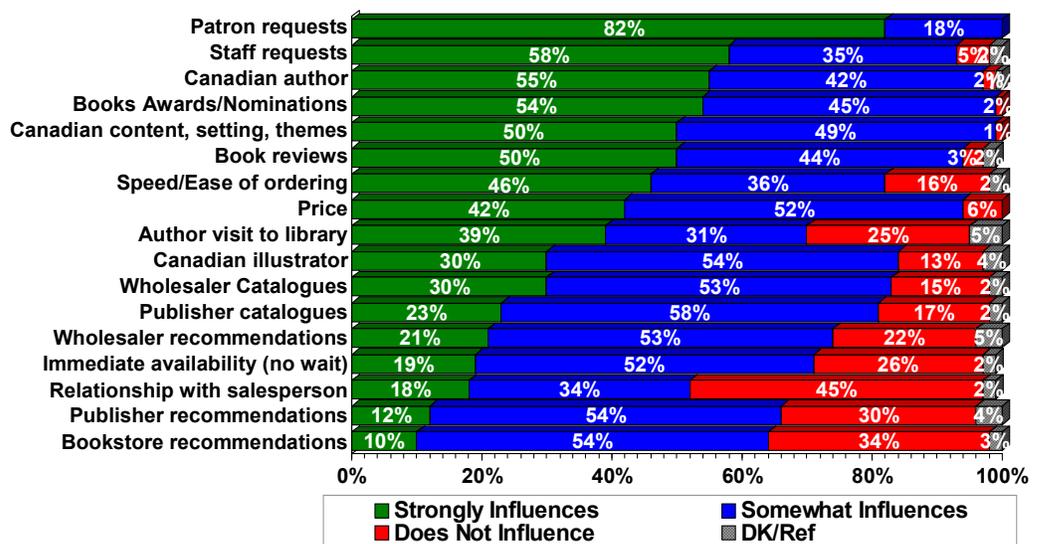
large libraries are “strongly” influenced by Canadian content, setting and themes, only 49% of smaller libraries are.

Convenience and Price also influence large and small libraries differently. Smaller libraries are more conscious of both, with 50% saying they are “strongly” influenced by Speed and Ease of Ordering and 46% saying they are “strongly” influenced by Price, compared to 28% and 17% respectively for large libraries.

Catalogues and recommendations appear lower on the list, but still play a role in the selection decision. Librarians indicate that catalogues and recommendations received from wholesalers are more influential than those received from publishers or bookstores.

The comprehensive charts that follow provide the detailed scores for each factor on the list.

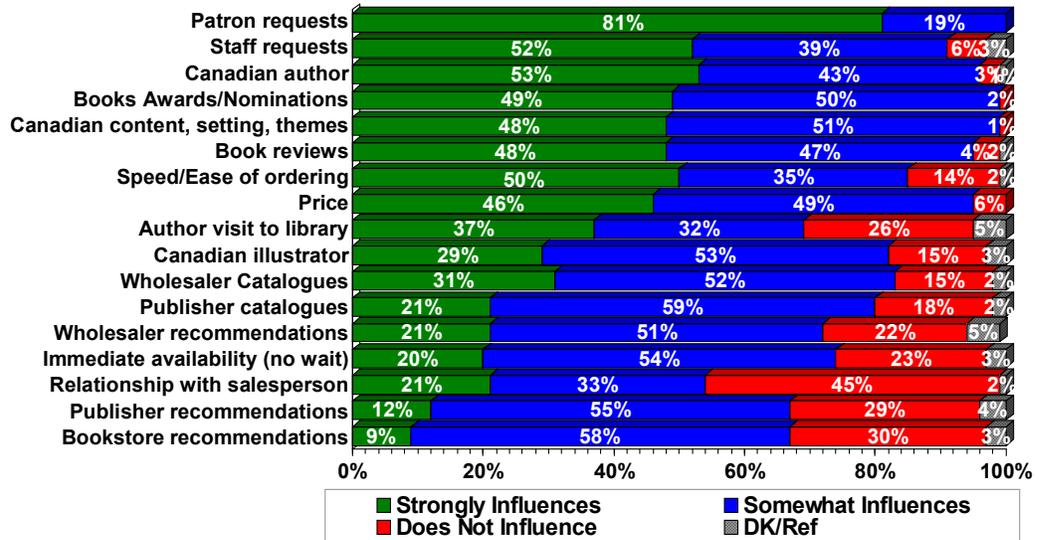
Factors Influencing Public Library Book Selection Decisions – OVERALL



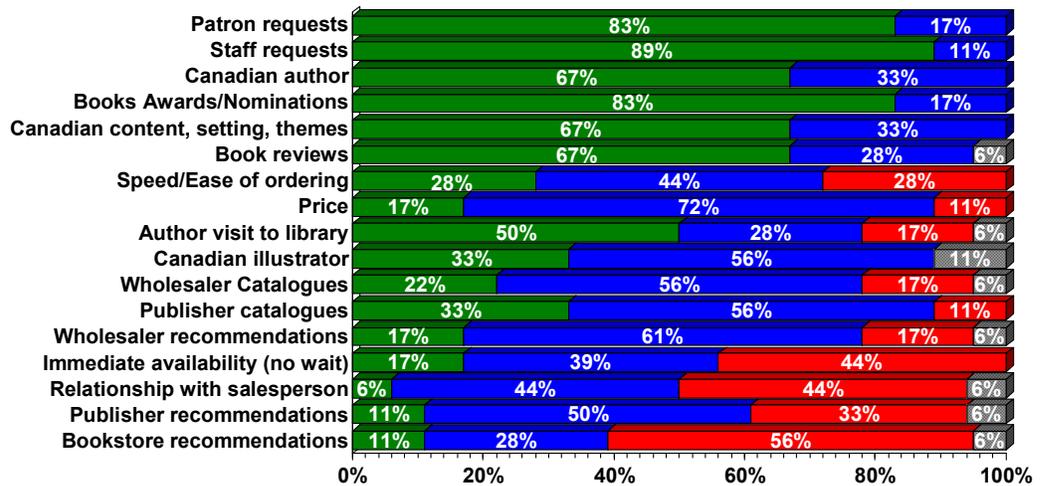
Q. Please indicate to what extent each of the following factors influences your library's book selection decisions

Factors Influencing Public Library Book Selection Decisions

Smaller Public Libraries



Large Public Libraries



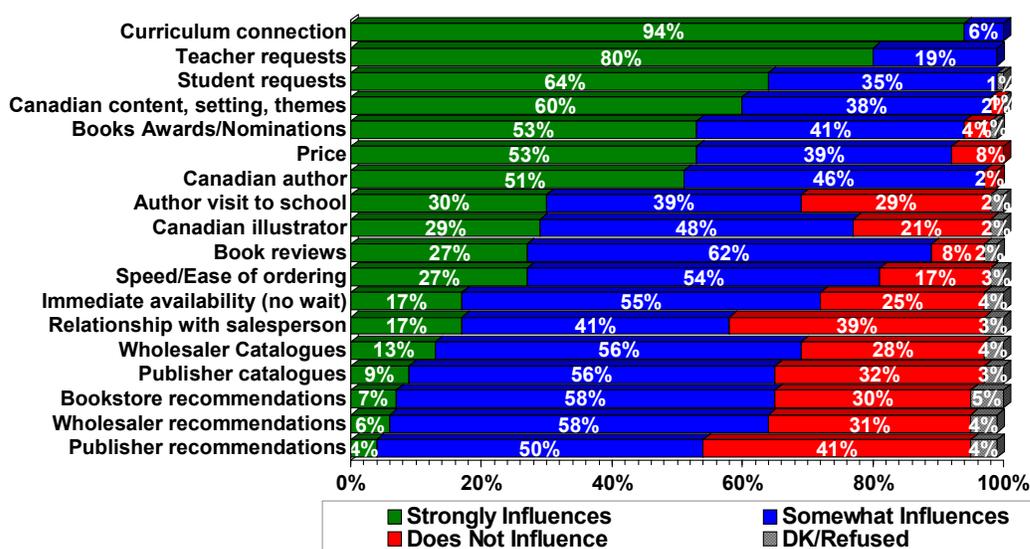
Q. Please indicate to what extent each of the following factors influences your library's book selection decisions

School Libraries

Curriculum connection is the most influential factor for School Libraries when they make book selection decisions, with 94% of respondents saying that curriculum connection strongly influences the book selection decision. Teacher requests are a close second with 80% saying that these strongly influence book selection decisions, followed by student requests (64%).

Canadian content, setting and themes (60%), as well as Canadian authorship (51%), also strongly influence the book selection decisions in school libraries. Book awards/nominations (53%) and price (53%) are also considered to be strong influences for the majority.

Factors Influencing School Library Book Selection Decisions - OVERALL



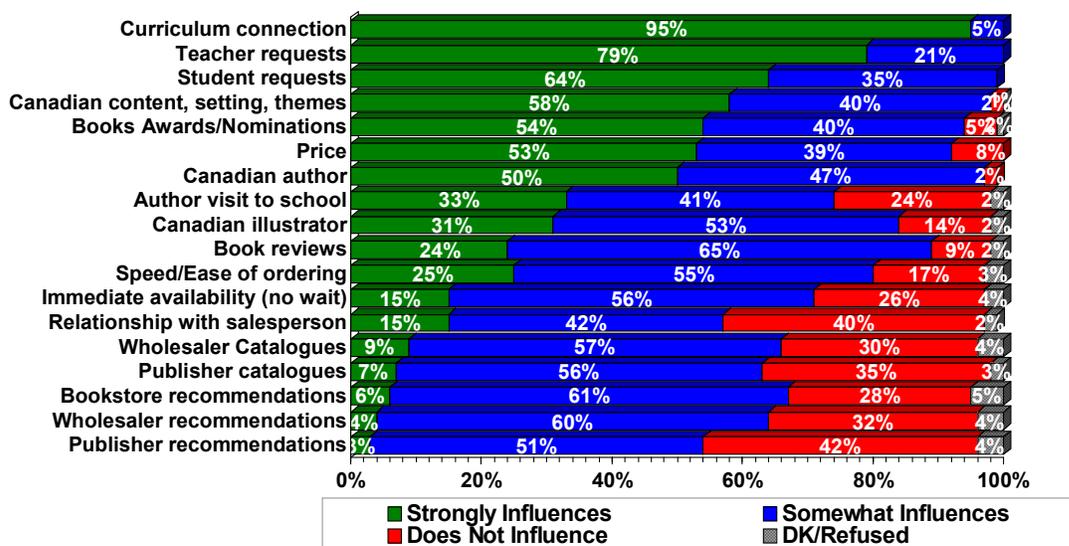
Q. Please indicate to what extent each of the following factors influences your school library's book selection decisions.

Canadian content, setting and themes plays a larger role in the decisions of larger schools (71% strongly influence vs. 58% in smaller schools), as do book reviews (42% strongly influence vs. 24% in smaller schools). Smaller schools are more likely than larger schools to be influenced by author visits to the school (56% of larger schools say it does not influence their decision, compared with 24% in smaller schools). Respondents in 54% of larger schools indicate that the fact that a book has a Canadian illustrator does not influence them, compared with 14% in smaller schools. Also, smaller schools are less likely to be influenced by book reviews (24% say it strongly influences them, compared to 42% in larger schools).

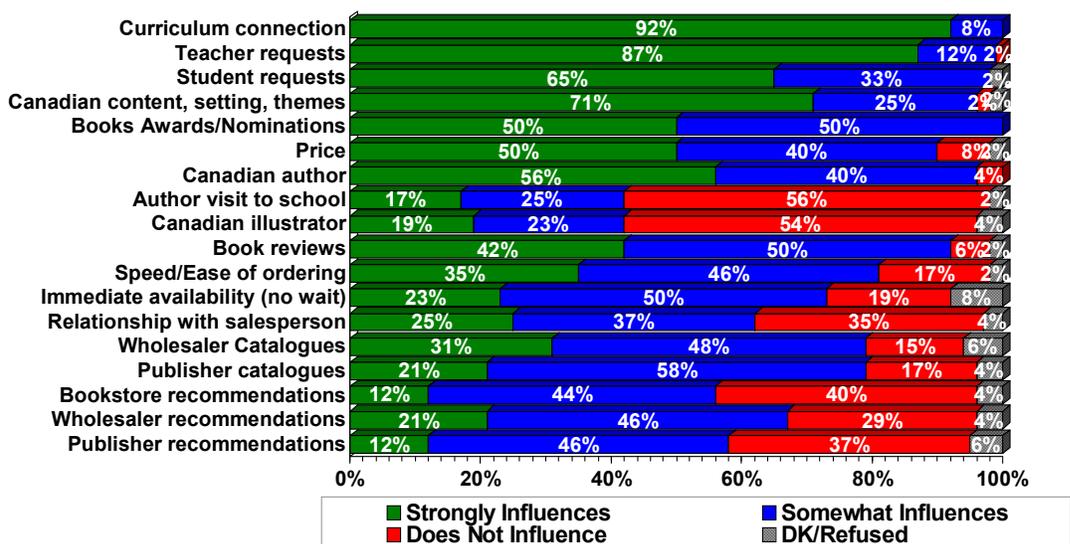
Results also show that while 90% of Elementary Schools indicate they would be strongly or somewhat influenced if the book was illustrated by a Canadian, only 44% of High School would be similarly influenced. Likewise, author visits to the school would strongly or somewhat influence 81% of Elementary School compared to only 40% of High Schools.

Factors Influencing School Library Book Selection Decisions

Smaller Schools



Larger Schools



Q. Please indicate to what extent each of the following factors influences your school library's book selection decisions.

C. Attitudes Towards Canadian Books

In order to gauge libraries' attitudes towards Canadian books, respondents were presented with a list of statements and they were asked how strongly they agreed with each statement using a 10-point scale where 1 meant they *strongly disagreed* and 10 meant they *strongly agreed*.

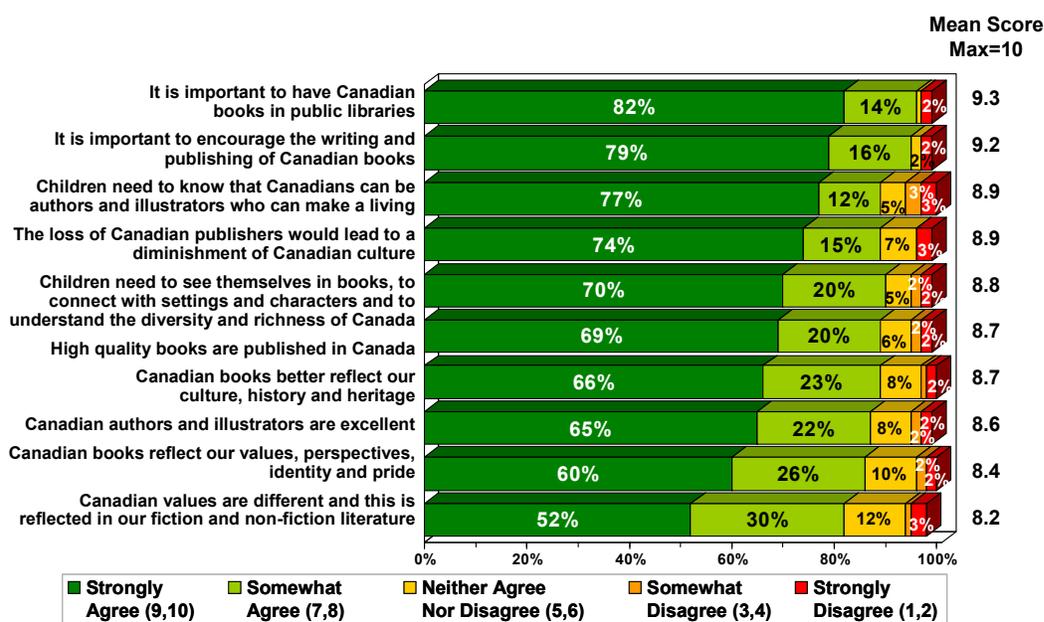
Public Libraries

Public Libraries are extremely positive in their view of Canadian books and their importance. Over half strongly agreed (scores of 9 or 10 out of 10) with every statement that they were presented with, and all scores were above 8, which is considered a good score.

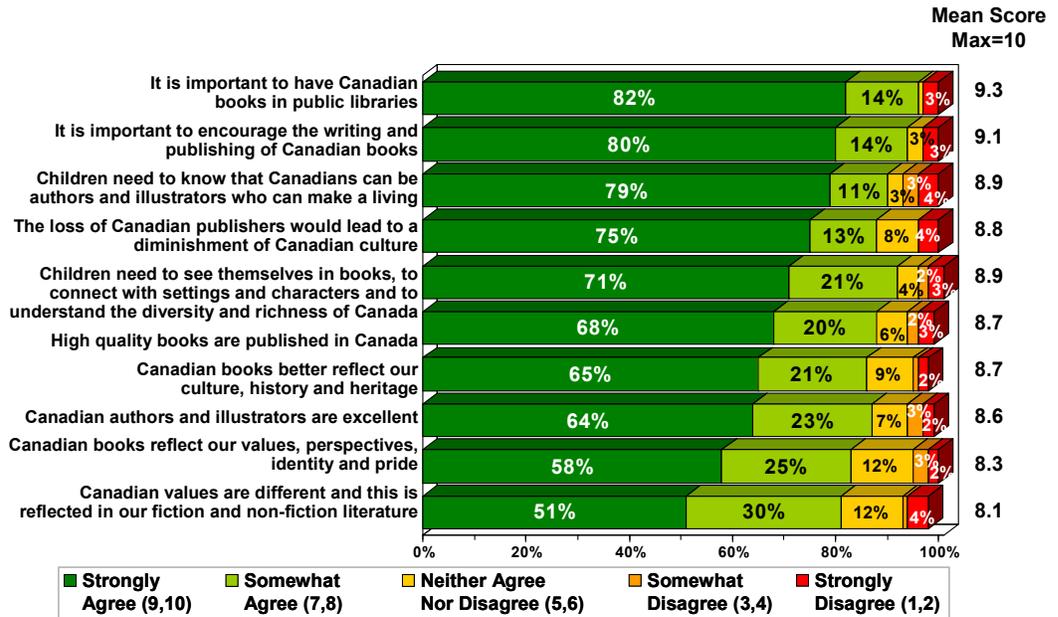
The statement that they most strongly agreed with is that "*It is important to have Canadian books in public libraries*", with 82% strongly agreeing, closely followed by "*it is important to encourage the writing and publishing of Canadian books*", with which 79% of librarians strongly agreed.

Agreement was lowest (although still strong) for the two statements that referred to Canadian values, "*Canadian values are different and this is reflected in our fiction and non-fiction literature*", and "*Canadian books reflect our values, perspectives, identity and pride*". However, only 4% of respondents either somewhat or strongly disagreed with these statements.

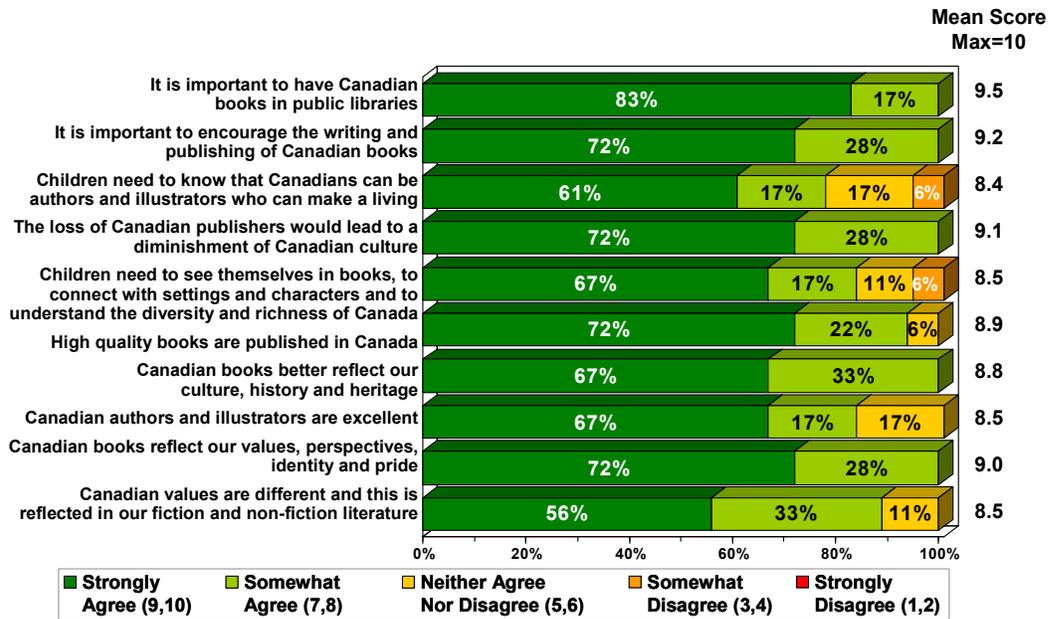
Public Libraries' Attitudes Towards Canadian Books - Overall



Public Libraries' Attitudes Towards Canadian Books - Smaller Libraries



Public Libraries' Attitudes Towards Canadian Books - Large Libraries



Q: Please indicate how strongly you agree or disagree with the following statements using a scale from 1 to 10 where 1 means you strongly disagree and 10 means you strongly agree.

There was a high degree of consensus overall between larger and smaller libraries regarding the statements. However, results reflected a few differences in the views of respondents. The large libraries were somewhat less likely to agree that *“children need to know that Canadians can be authors and illustrators who can make a living”* than smaller libraries (with 61% of large libraries strongly agreeing with the statement compared to 79% of smaller libraries). Also, large libraries were more likely to agree that *“Canadian books reflect our values, perspectives, identity and pride”* (72% of large libraries strongly agree and 28% somewhat agree vs. 58% of smaller libraries saying they strongly agree and 28% somewhat agreeing).

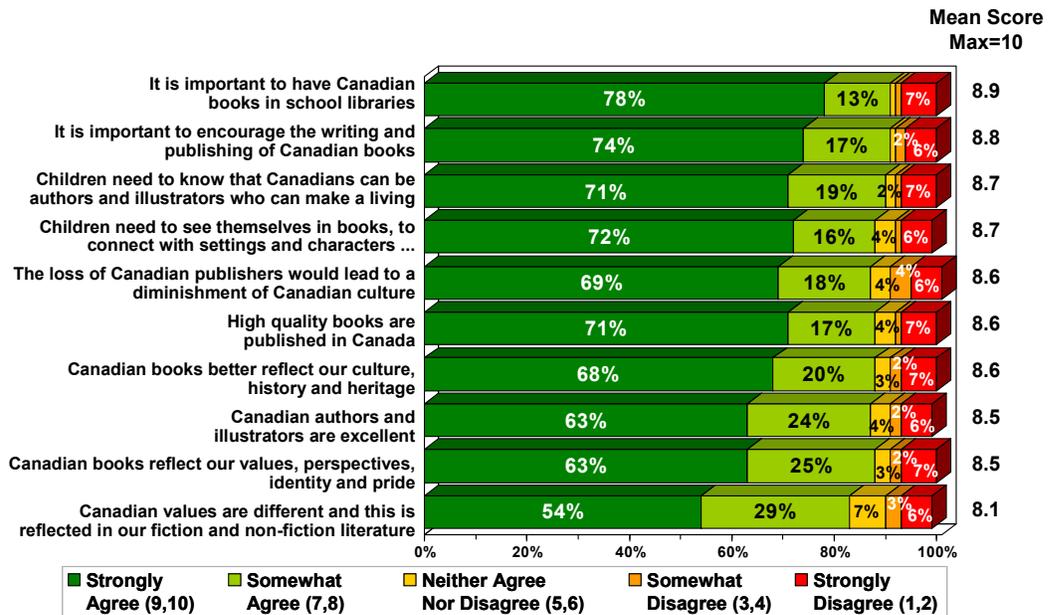
School Libraries

A majority of respondents from School Libraries also strongly agreed with the statements regarding Canadian books. Again, all scores were good - above 8 on a 10-point scale.

As with Public Libraries, School Libraries agreed least strongly with the statement that *“Canadian values are different and this is reflected in our fiction and non-fiction literature”* (but, as was the case for the Public Libraries, agreement was still strong, with 54% indicating they strongly agree). Similarly they agreed most strongly with the statements that *“It is important to have Canadian books in school libraries”* and *“It is important to encourage the writing and publishing of Canadian books”* (78% and 74% respectively saying they strongly agree).

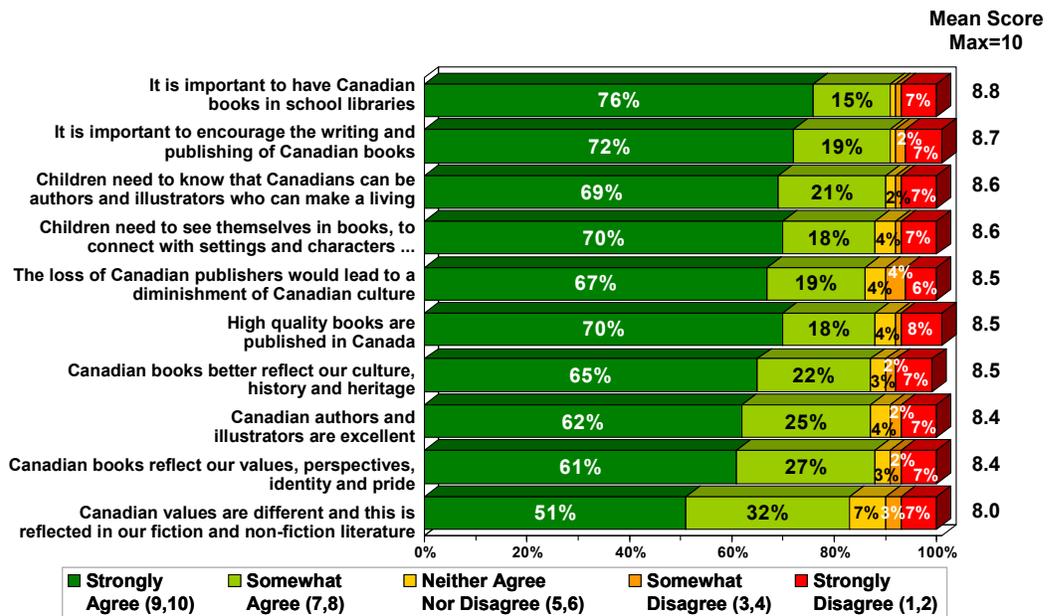
Respondents from the larger schools expressed stronger agreement with all the statements than their counterparts from the smaller schools.

School Libraries' Attitudes Towards Canadian Books – Overall

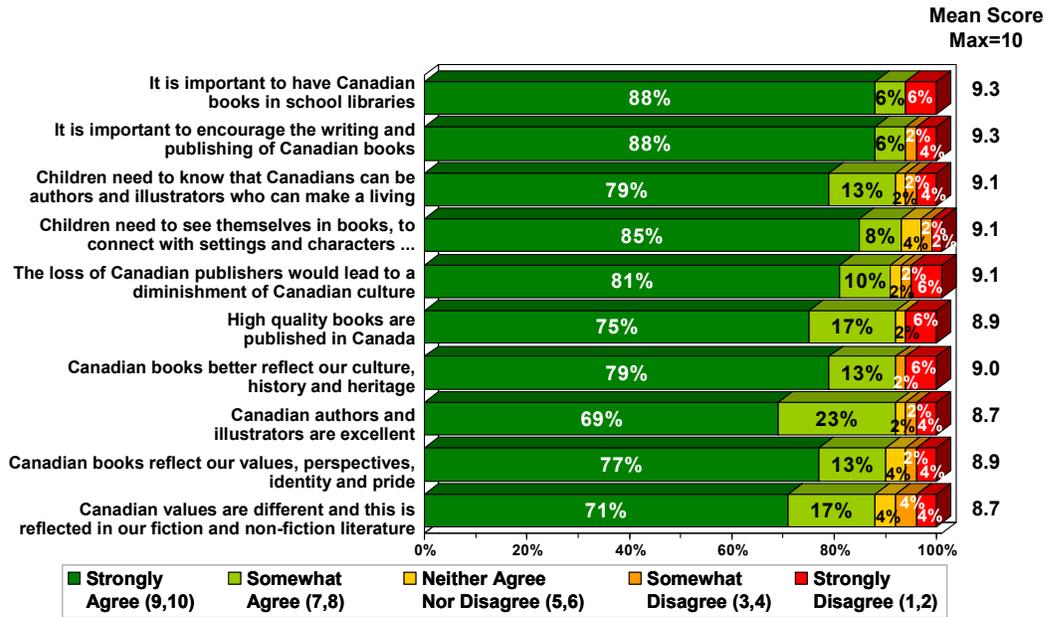


Q: Please indicate how strongly you agree or disagree with the following statements using a scale from 1 to 10 where 1 means you strongly disagree and 10 means you strongly agree.

School Libraries' Attitudes Towards Canadian Books – Smaller Schools



School Libraries' Attitudes Towards Canadian Books – Larger Schools



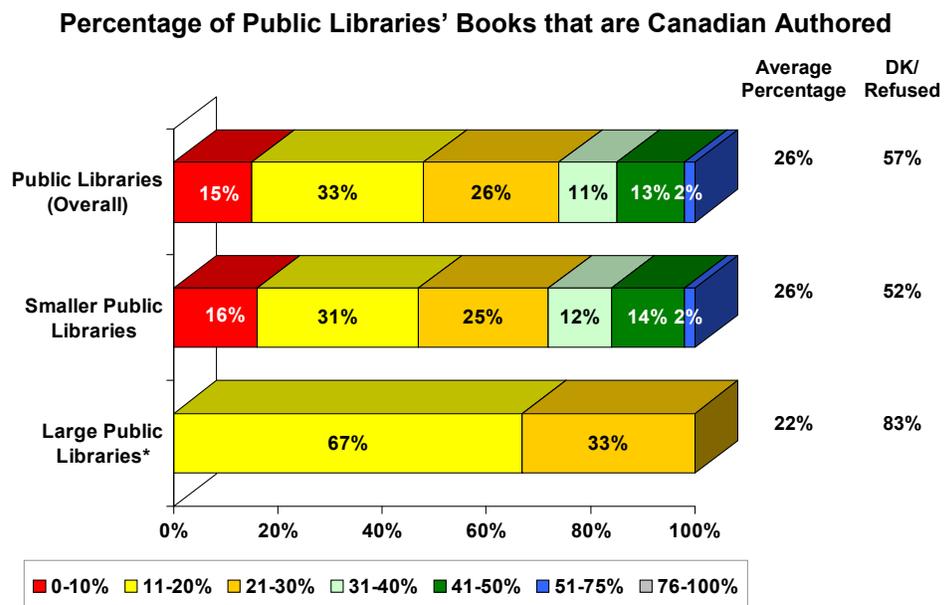
Q: Please indicate how strongly you agree or disagree with the following statements using a scale from 1 to 10 where 1 means you strongly disagree and 10 means you strongly agree.

D. Canadian Books in Library Collections

The results of the survey confirm the opinions of key informants gathered in the first phase of this study regarding the lack of information available about the proportion of Canadian books in library collections. Indeed, findings indicate that awareness of Canadian authors is low and data regarding Canadian books is generally not tracked systematically in the library community.

Public Libraries

Over half (57%) of public libraries were unable to say what percentage of books in their library collections is Canadian authored. Among the largest libraries, only three of the 18 libraries responding were able to provide an answer to the question.

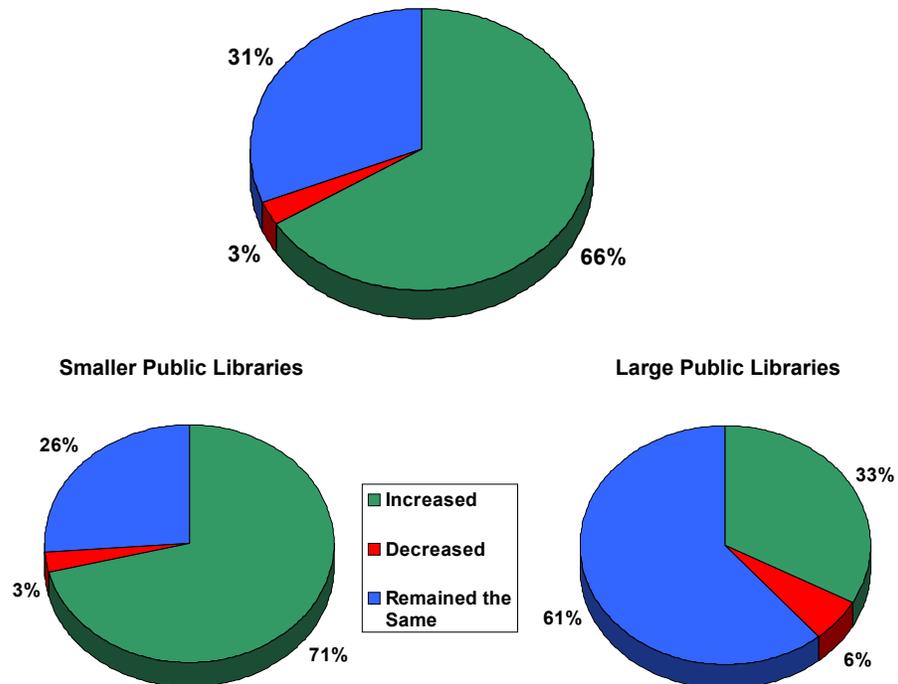


Q: Overall, what percentage of books in your library are Canadian authored?
(Base : Those that provided an answer)

The average percentage of Canadian authored books among those that answered was 26%. The percentage was similar for both large and smaller libraries (22% and 26% respectively), however the percentage varied from library to library. Over half of libraries overall (59%) said that between 11-30% of their collection is Canadian authored, while at the lower end of the scale, 15% of libraries reported that 0-10% of books in their library are

Canadian authored, and at the top end, 15% also said that between 40-75% of books in their library are Canadian authored.

Change in Proportion of Books in Collections That Are Canadian Authored Public Libraries (Overall)



Q: Compared to five years ago, would you say that the proportion of books in your collection that are Canadian authored has increased, decreased or remained the same?

Overall, two-thirds (66%) of public libraries indicate that the proportion of Canadian authored books in their collections has increased in the last five years, one-third (31%) say it has remained the same, and only 3% (4 libraries) say it has decreased.

However, smaller libraries are significantly more likely to report increases than large libraries. Over twice the percentage of smaller libraries as large libraries (71% vs. 33%) say that the proportion of Canadian authored books in their collections has increased in the last five years. Conversely, large libraries are more than twice as likely to say that the proportion has remained the same (61% vs. 26%).

Reasons why proportion of Canadian authored books has increased in public library collections in the last five years

	Overall n=82	Smaller Libraries n=76	Large Libraries n=6
Canadian Content Important	32%	34%	0%
Accessibility/Availability of Canadian Books/Authors	30%	26%	83%
Publicity/Promotion/Marketing	17%	17%	17%
Better Quality of Materials/Authors	16%	13%	50%
Awareness	12%	13%	0%
Funding/Budget	10%	9%	17%
Increased Demand	6%	7%	0%
Donations	6%	7%	0%
Change of Librarian	5%	5%	0%
OLA Reading Programs/Clubs	4%	4%	0%
Catalogues offer more Canadian Authors/Content	2%	3%	0%

Base: Those who said the proportion of Canadian authored content in their collections has increased compared to five years ago.

The reason most commonly cited by respondents from smaller libraries for the increase is that Canadian content is important (32%) and they have made a conscious effort to increase the quantity of Canadian authored books in their collections. This is reflected in comments such as:

- *“We are making a more determined effort to collect Canadian materials”*
- *“I have made a point to purchase more Canadian books”*
- *“I value Canadian authors and illustrators. It is necessary to guard our Canadian culture from too much American influence.”*

A similar proportion, particularly among respondents from larger libraries, (30% overall, 26% smaller libraries and 83% larger libraries), indicated that there is more Canadian content available than in the past and that the quality of these materials is increasing (16% overall).

- *“There are more Canadian authors/illustrators”*
- *“More books available. More authors writing better books.”*
- *“There are more high caliber Canadian authors than there were say 10 years ago”*
- *“The increase has occurred largely in the juvenile/young adult collection. This is mainly due to the increase in quality titles in this area.”*
- *“Surge in quality children’s materials written and illustrated by Canadians.”*
- *“Increased availability of Canadian resources, more titles, more diversity of subject matter”*
- *“More and better selection, especially in non-fiction.”*

Almost one in five (17%) respondents attributed the increase to “publicity/promotion/marketing” and similarly 12% of smaller library respondents said that there is now greater awareness of Canadian authored books.

- *“Greater promotion of Canadian authors.”*
- *“More awareness of Canadian authors and illustrators.”*
- *“More publicity – Books section of the Globe is a big influence and does a great job covering Canadian authors.”*
- *“Better overall awareness of Canadian authors.”*

Ten percent of libraries said that increased budgets/funding has allowed them to purchase more Canadian authored content for their collections and six percent said the increase was thanks to donations of Canadian materials.

- *“Trillium Grant, donations from OLA”*

- *“Donations of books through Lieutenant Government/Kids Ontario Read/SOLS books donations..”*
- *“Our budget for purchasing has improved.”*
- *“More funding for purchases.”*
- *“Donations from bookstores.”*

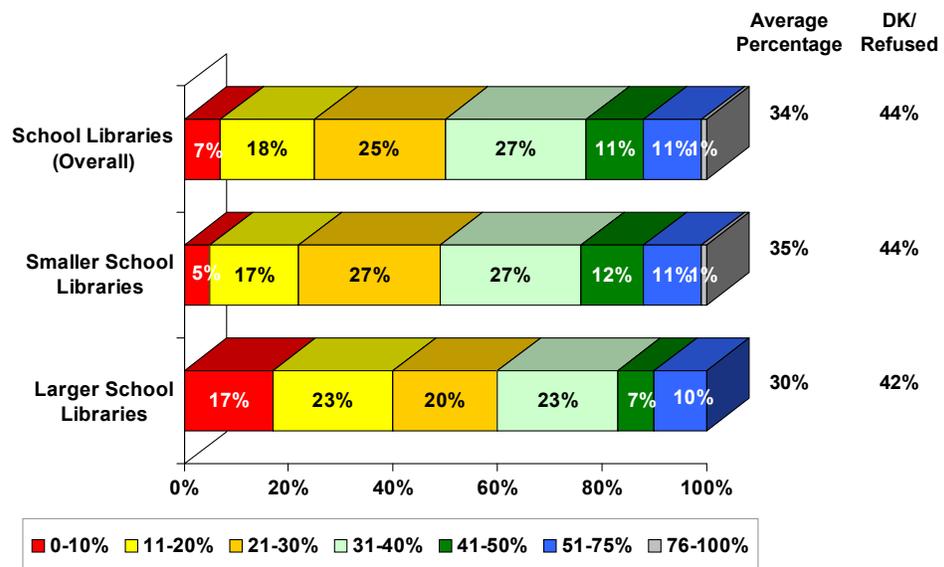
Other reasons for the increase in smaller libraries include increased demand (6%), change of librarian (5%), reading programs (4%) and that catalogues offer more Canadian authors/content (2%).

Among the four libraries that said the proportion had decreased, one respondent said the reason for the decreasing proportion of Canadian books in the collection was that selection/availability had decreased. Another felt that the decrease was caused by a strong media influence on readers – in particular that *“When U.S. legislation changed enabling publishers to also own media outlets, we noticed the pressure to purchase more copies of bestsellers which are usually U.S.”*

School Libraries

As with the Public Libraries, a large percentage of School Libraries (44%) were unable to provide an estimate of the percentage of books in their library that are Canadian authored. However, of those that did provide an answer, they reported that, on average, 34% of books in their collections were Canadian authored. The percentage was slightly higher in smaller school libraries (35%) than in larger school libraries (30%). Almost three-quarters of schools (70%) said that between 11-40% of their collection was Canadian authored.

Percentage of School Libraries' Books that are Canadian Authored

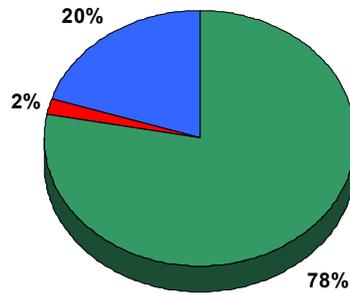


Q: Overall, what percentage of books in your school library are Canadian authored?
(Base : Those that provided an answer)

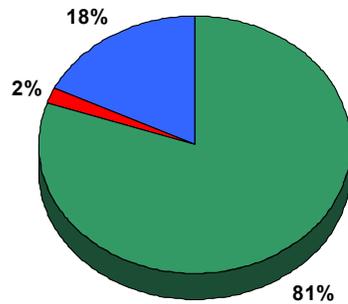
Over three-quarters (78%) of School Libraries indicated that, compared to five years ago, the proportion of books in their collections that are Canadian authored has increased. One in five (20%) said it has remained the same while only 2% said it has decreased. Smaller schools were more likely to report an increase than larger schools (81% vs. 63%) while the larger schools were more likely to say that the proportion had remained the same (33% vs. 18%)

Change in Proportion of Books in Collections That Are Canadian Authored

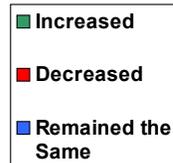
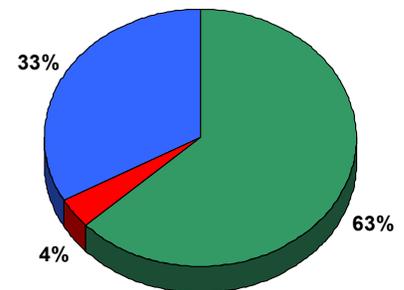
School Libraries (Overall)



Smaller School Libraries



Larger School Libraries



Q: Compared to five years ago, would you say that the proportion of books in your collection that are Canadian authored has increased, decreased or remained the same?

Reasons why proportion of Canadian authored books has increased in School library collections in the last five years

	Overall n=240	Smaller Schools n=207	Larger Schools n=33
OLA Reading Programs/Silver Birch	38%	40%	27%
Canadian Content Important	37%	36%	42%
Accessibility/Availability of Canadian Books/Authors	21%	22%	15%
Curriculum	13%	9%	33%
Awareness	12%	13%	6%
Publicity/Promotion/Marketing	7%	7%	6%
Funding/Budget	5%	5%	6%
Better Quality of Materials/Authors	5%	5%	3%
Other	10%	9%	12%
DK/Refused	6%	6%	3%

Base: Those who said the proportion of Canadian authored content in their collections has increased compared to five years ago.

Participation in OLA reading programs such as the Silver Birch was the most frequently cited reason, especially by smaller schools, for the increased proportion of Canadian authored books in school library collections and was mentioned by 38% of respondents overall. Specific comments include:

- *“White Pine award books are ordered every year now”*
- *“Participation in the Ontario Library Association reading programs.”*
- *“One reason is the Ontario Library Association’s Awards (Silver Birch, Red Maple, White Pine)”*
- *“Use of OLA reading programs – Silver Birch and Blue Spruce”*

- *“OLA Forest of reading initiatives provides list of suitable Canadian books.”*

Many schools (37%) attribute the increase to the importance of Canadian content and making an effort to purchase more Canadian authored books:

- *“I feel that having books by Canadian authors is important to our students and consciously choose good Canadian literature for our library where appropriate.”*
- *“We have consciously purchased literature with Canadian authors in mind.”*
- *“Have made a point of purchasing books written for and by Canadians.”*
- *“We live in Canada and our libraries should reflect this fact.”*

Over a fifth (21%) also say that Canadian authored materials are more available/accessible than in the past:

- *“More to choose from.”*
- *“Availability, improved quality and prices.”*
- *“I am finding more to purchase”*
- *“More availability and quality keeps improving.”*
- *“Easier to obtain.”*
- *“More and better materials available.”*
- *“Canadian books are more readily available now.”*

Over one in ten overall (13%), including 33% of larger schools and 9% of smaller schools, indicate that the curriculum is at least partly responsible for the increase in Canadian authored materials in libraries:

- *“Curriculum has influenced our purchasing, especially in the Canadian heroes unit in Grade 9, Civics, History, some encyclopedias and science books.”*
- *“More emphasis in the curriculum on Canadian events, people, history etc.”*

- *“Since we have a common curriculum across Ontario, with its large population, writers and publishers are writing with the curriculum directly in mind.”*

A number also felt that publicity, promotion and marketing had played a role (7%) as had greater awareness of Canadian materials in general (6%):

- *“One reason has been the increased awareness of titles through the OLA Forest of Reading programs. I buy multiple copies of these titles.”*
- *“Publishers and wholesalers have been better at highlighting Canadian talent.”*

Other factors which had caused libraries to increase the proportion of Canadian authored materials in their collections include extra funding (5%), the availability of better quality materials (5%), demand from teachers (3%), changes in staff (3%) and author visits (2%).

Only 6 of the 309 schools that responded to the survey said that the proportion of books in their collection that are Canadian authored has decreased in the last five years. The reasons for this include:

- *“It is sometimes difficult to purchase books with core Canadian content due to the fact that many of the publishers are American and say there is a limited market for Canadian focused content.”*
- *“Cost of books and limited budget.”*
- *“Too many American imports and not enough Canadian publishers doing the content I need.”*
- *“Lack of availability. No time to seek out Canadian content.”*
- *“Canadian content not available on certain topics.”*

E. Barriers to having more Canadian Books in Library Collections

Respondents were presented with a list of items and asked which, if any, they considered to be barriers to having more Canadian authored books in their collections. They were also asked to identify other perceived barriers.

While budget cutbacks was identified as the main single obstacle, the lack of awareness of Canadian books and Canadian authors (*“low awareness of Canadian books”*, combined with *“difficulty in identifying Canadian authors”*) represents the most important barrier to having more Canadian books in library collections.

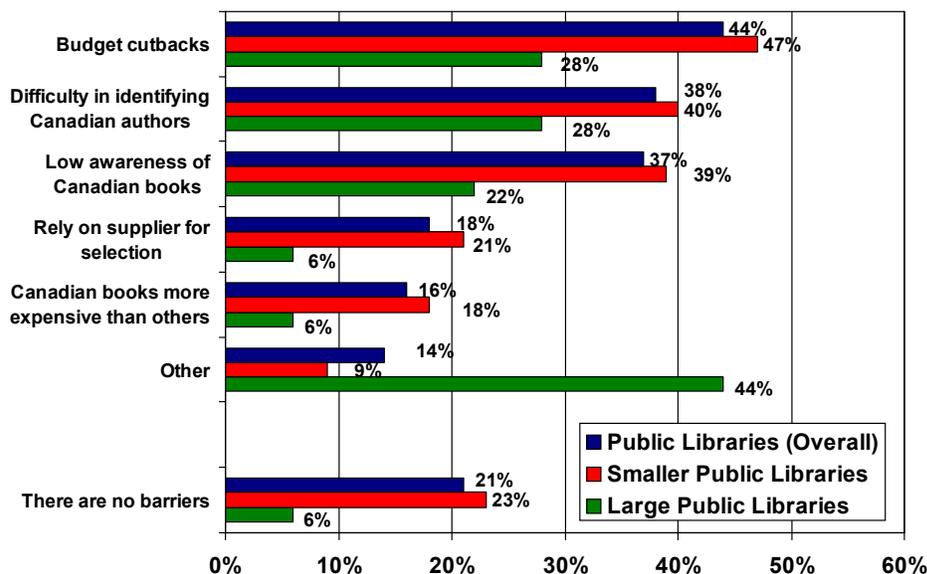
Public Libraries

Difficulty in identifying Canadian authors was identified as a barrier by 38% of libraries overall including 40% of smaller libraries and 28% of large libraries. Similarly, low awareness of Canadian books is seen as a barrier by 37% of Ontario Public Libraries overall including 39% of smaller libraries and 22% of large libraries.

Almost half of Ontario Public Libraries (44%) indicate that budget cutbacks are a barrier to having more Canadian books in public libraries. Budget cutbacks are more likely to be a barrier for smaller libraries (47%) than for large libraries (28%).

A reliance on suppliers for selection is considered a barrier by 18% of libraries – again more so by smaller libraries than large libraries. 16% of public libraries feel that Canadian books are more expensive than others and that this is a barrier to having more Canadian authored books in libraries.

Barriers to Having More Canadian Authored Books in Public Libraries



Q. What are the barriers to having more Canadian authored books in public libraries?
(SELECT ALL THAT APPLY)

Fourteen percent of Public Libraries, including 44% of large public libraries (8 libraries), indicated that there were other barriers to having more Canadian authored books in Public Libraries. A few respondents, including 22% of large public libraries report that there are not enough Canadian books being published, either in general, or in certain subject areas. Another barrier is that there is not enough demand from library patrons for Canadian books and that they prefer to read best sellers, primarily from the U.S. A few also feel that they do not get enough information, particularly about small publishers. Specific comments include:

- *“May not be available in subject required.”*
- *“Not enough selection in adult fiction”*
- *“Low to moderate demand”*
- *“Low interest in new Canadian authors”*
- *“Requests from patrons for ‘best-sellers’” “Best-selling non-Canadians”*
- *“Patron preference not always Canadian”*
- *“The availability of cheap US paperbacks.”*
- *“US companies are in your face advertisers”*

- “No reliable reviewing media for Canadian”
- “Receiving publication info from small presses”
- “Small press/self-pub. hard to find”

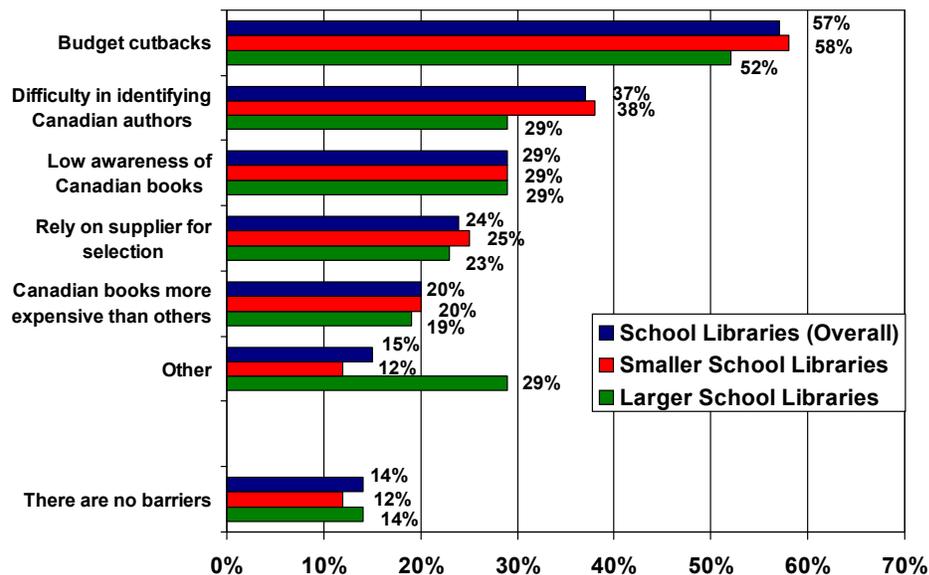
Overall, 21% of public libraries feel that there are no barriers to having more Canadian authored books in public libraries. Smaller public libraries are more likely to feel this way than large public libraries (23% vs. 6%).

School Libraries

As with Public Libraries, budget cutbacks were seen as the greatest single obstacle by School Libraries. However, this represents a greater problem for School Libraries than for Public Libraries, with 57% of School Libraries compared to 44% of Public Libraries, indicating this was a barrier to having more Canadian authored books in their libraries.

Again, low awareness of Canadian authors and Canadian books, combined, is seen as the greatest barrier to having more Canadian authored books in School libraries. Indeed, more than a third of respondents cite “difficulty in identifying Canadian authors” as a barrier to having more Canadian authored books in school libraries. This is slightly more of a problem for smaller schools 38% than for larger schools 29%. And 29% cite “low awareness of Canadian books” (29%) as a barrier.

Barriers to Having More Canadian Authored Books in School Libraries



Q. What are the barriers to having more Canadian authored books in school libraries?
(SELECT ALL THAT APPLY)

When asked if there were any other barriers to having more Canadian authored content in school libraries, 10% of respondents cited low availability, especially on curriculum related topics, and 2% said there was no need/demand or interest. Specific comments include:

- *“Availability of good Canadian material”*
- *“The more available, the more I use!”*
- *“Canadian books relevant to curriculum needed”*
- *“Few Canadian books on social issues”*
- *“High School material not available”*
- *“Lack of Canadian content e.g. geography”*
- *“Lack of General Reference by Canadians”*
- *“Limited non-fiction selection”*
- *“Canadian books cannot compete against U.S.”*
- *“Dominance of American popular culture”*
- *“Time required to source Canadian material”*
- *Time and specific personnel for task”*
- *“Quality and student preference”*
- *“Limited audience”*

Overall, 14% of respondents saw no barriers to having more Canadian authored books in school libraries.

F. Encouraging Libraries to Purchase More Canadian Content

Respondents were asked to rate the effectiveness of a number of measures that might encourage them to purchase more Canadian content for their libraries.

Public Libraries

The measures identified as the best solutions are consistent with the perceived barriers identified earlier.

Of the options presented to them, respondents from Ontario Public Libraries felt that “marketing to make librarians more aware of which authors are Canadian” would be the most effective way of encouraging public libraries to purchase more Canadian content. Almost two-thirds (62%) thought it would be extremely effective (scores of 9 or 10 out of 10) while an additional one in five (21%) thought it would be somewhat effective (scores of 7 or 8 out of 10).

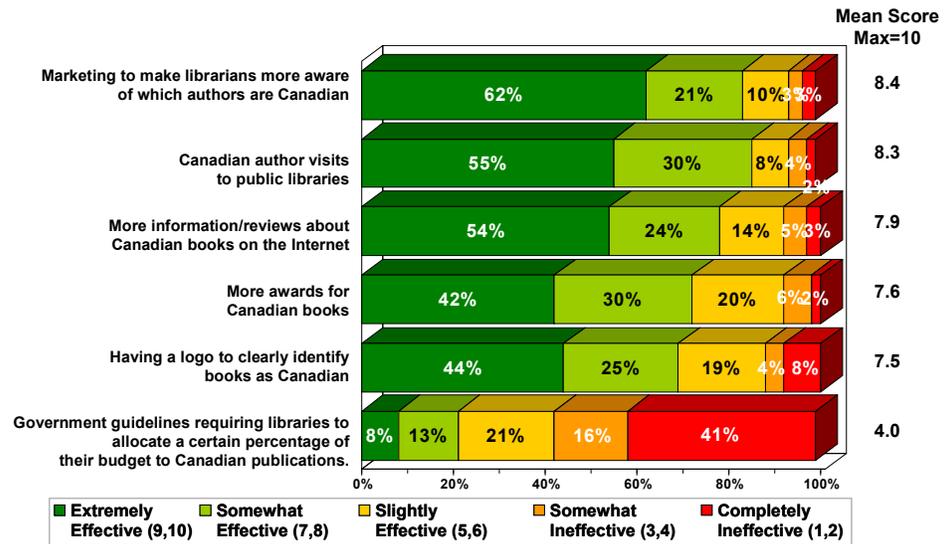
This was closely followed by “Canadian author visits to public libraries”, which 55% thought would be extremely effective and 30% thought would be somewhat effective.

Fifty-four percent thought that having “More information/reviews about Canadian books on the Internet” would be extremely effective while “more awards for Canadian books” and “having a logo to clearly identify books as Canadian” were thought to be extremely effective by 42% and 44% of respondents respectively.

Over half of respondents rejected the proposal of “Government guidelines requiring libraries to allocate a certain percentage of their budget to Canadian publications.” Forty-one percent said such a measure would be completely ineffective (scores of 1 or 2 out of 10) and 16% said it would be somewhat ineffective (scores of 3 or 4 out of 10).

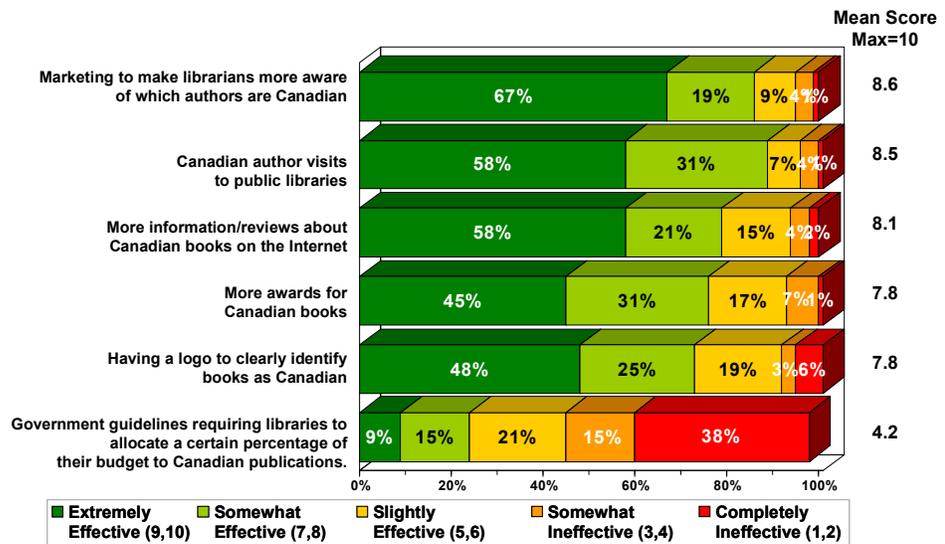
While smaller libraries were more receptive than larger ones to all proposed measures, both groups agreed about which measures would be most effective.

Encouraging Public Libraries (Overall) to Purchase More Canadian Content

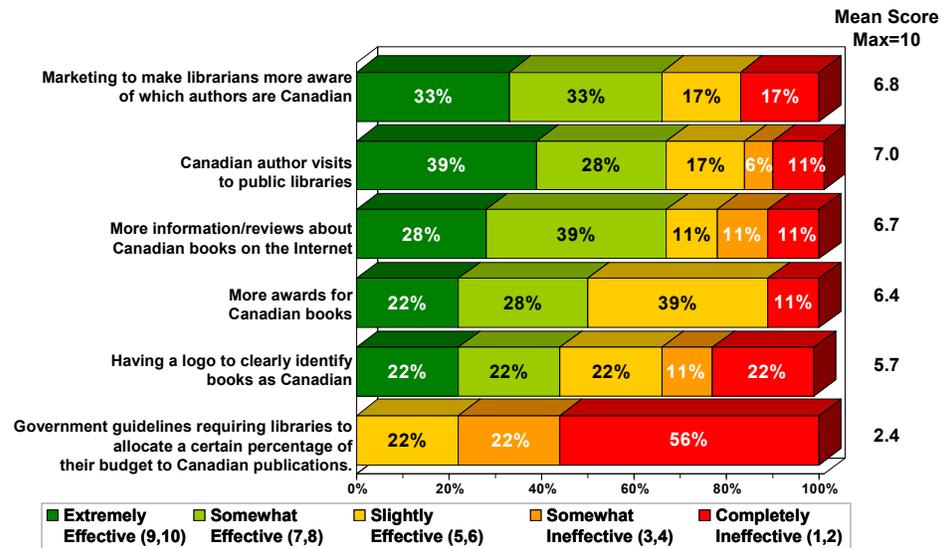


Q: How effective do you think each of the following factors would be in encouraging you to purchase more Canadian content for your library? Please use a scale from 1 to 10 where 1 means completely ineffective and 10 means extremely effective.

Smaller Public Libraries



Large Public Libraries



Q: How effective do you think each of the following factors would be in encouraging you to purchase more Canadian content for your library? Please use a scale from 1 to 10 where 1 means completely ineffective and 10 means extremely effective.

When asked the open-ended question “what other factors, if any, would encourage you to purchase more Canadian content for your library?”, respondents had a number of suggestions, listed in the table that follows.

In all, 14% of respondents said that more listing/cataloguing/promoting/of Canadian books would encourage them to purchase more. While 17% of smaller libraries said that more funding/budget would encourage them to purchase more, this was not a factor mentioned by any of the large libraries. Larger libraries are more restricted by a lack of availability of suitable books and a lack of patron demand.

What other factors would encourage you to purchase more Canadian content for your library?

	Overall	Smaller Public Libraries	Large Public Libraries
Listing/cataloguing/promoting/ of Canadian books	14%	14%	17%
More funding/budget	14%	17%	0%
Awareness of Canadian Authors/Publishers	10%	10%	11%
Demand from Public/Patrons	8%	7%	17%
More Canadian subjects	7%	6%	17%
Cost of books/provide incentives	7%	7%	6%
Visits from authors	4%	4%	6%

Some specific comments include:

- *“Higher profile would lead to more requests”*
- *“More information regarding Canadian authors including book title, book content, availability”*
- *“More marketing aimed at readers and clientele of public libraries. Client demands have a great influence on what we purchase.”*
- *“More promotion from publishers concerning their Canadian authors so that patrons are aware of the authors and will check out their books - if they are not familiar with them like they are with John Grisham, for example, they are less likely to take a chance and read their books. They are more likely to stick with the well promoted and super well-know American authors!”*
- *“More TV and radio coverage of Canadian authors and books results in increased interest in these books from patrons. If patrons want them, I'll buy them.”*

- *“Current information from reputable publishers; availability of books on specific subjects where Canadian content is essential, such as Canadian geography”*
- *“A bigger budget! Most of us look longingly at the Canada Reads selections and hope that the Friends of the Library or an individual will donate a copy.”*
- *“Awareness of Canadian authors in various fiction genres would help.”*
- *“Wholesalers create selection material that specifically lists Canadian books.”*
- *“Better price, more reviews, better marketing and promotion”*
- *“Demand from the public for Canadian authors and content”*
- *“Increased public demand, which might come with increased awareness of Canadian books and their importance.”*
- *“I think that if we were able to get fairly well known, well reviewed Canadian authors to do talks, at a reasonable cost, this would drive up the demand. More demand equals more books.”*
- *“Bring more authors to Northern Ontario for readings and displays”*
- *“More available - especially in non-fiction, that fit with the curriculum, and is specifically Canadian content.”*
- *“Nonfiction books specific to Canada. For example, we really need books written for adults (not lawyers) on Canada law. Books about Canadian history, Canadian animals, etc. etc. Canadian fiction is quite well covered.”*
- *“We would be looking for Native Reference material for our library as we live on the First Nation.”*

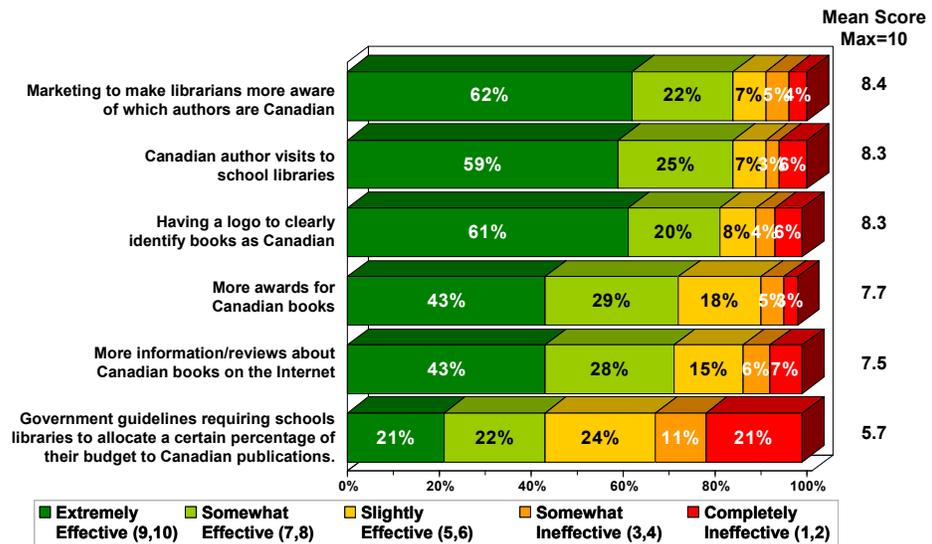
School Libraries

School Library respondents agreed with respondents from Public Libraries that “marketing to make librarians more aware of which authors are Canadian” would be the most effective way of encouraging them to purchase more Canadian content for their library. In total, 62% thought such a measure would be extremely effective and 22% thought it would be somewhat effective. “Canadian author visits to school libraries” and “having a logo to clearly identify books as Canadian” were considered almost as effective, with 59% and 61% respectively rating these as extremely effective and 25% and 20% rating them as somewhat effective. “Canadian author visits to school libraries” and “having a logo to clearly identify books as Canadian” were considered almost as effective, with 59% and 61% respectively rating these as extremely effective and 25% and 20% rating them as somewhat effective.

Over two-thirds of survey respondents also indicated that “more awards for Canadian books” and “more information/reviews about Canadian books on the Internet” would be either somewhat or extremely effective in encouraging them to purchase more Canadian content for their libraries (72% and 71% in total, respectively).

The School Library respondents also agreed with their Public Library counterparts that “Government guidelines requiring school libraries to allocate a certain percentage of their budget to Canadian publications” would be the least effective of the measures proposed. However, 43% thought such guidelines would be either extremely (21%) or somewhat (22%) effective.

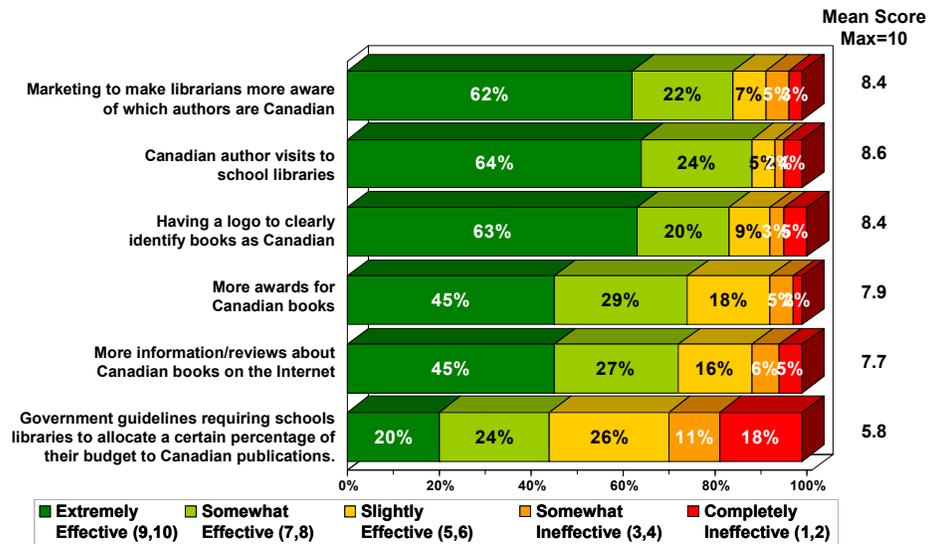
Encouraging School Libraries (Overall) to Purchase More Canadian Content



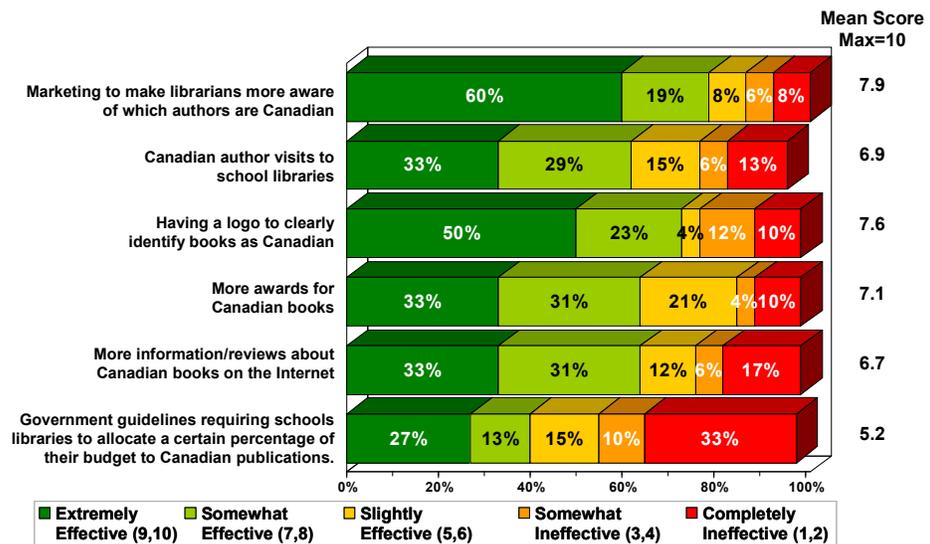
Q: How effective do you think each of the following factors would be in encouraging you to purchase more Canadian content for your library? Please use a scale from 1 to 10 where 1 means completely ineffective and 10 means extremely effective.

Smaller schools were significantly more likely to consider “Canadian author visits to school libraries” an extremely effective way of encouraging them to purchase more Canadian books for their libraries than were larger schools (64% and 33% respectively). Smaller schools also felt “more awards for Canadian books” and “more information/reviews about Canadian books on the Internet” would be marginally more effective than did larger libraries.

Smaller Schools



Larger Schools



Q: How effective do you think each of the following factors would be in encouraging you to purchase more Canadian content for your library? Please use a scale from 1 to 10 where 1 means completely ineffective and 10 means extremely effective.

When asked the open-ended question “what other factors, if any, would encourage you to purchase more Canadian content for your library?” respondents had a number of suggestions. The most frequently mentioned suggestions were “having more materials that relate to the curriculum” and “more funding/budget”.

Larger schools were more likely than smaller schools to complain about lack of suitable material – whether related specifically to the curriculum, related to Canadian subjects or availability in general.

Although increased funding was mentioned by a similar proportion of both small and large schools (12% and 13% respectively), smaller schools were somewhat more likely to say that the reducing the cost of books/providing incentives would encourage them to purchase more Canadian content (8% vs. 2%).

What other factors, if any, would encourage you to purchase more Canadian content for your library (OPEN ENDED)

	Overall	Smaller Schools	Larger Schools
Related to curriculum	13%	12%	21%
More funding/budget	13%	12%	13%
Listing/cataloguing/promoting/ of Canadian books	7%	7%	8%
Cost of books/provide incentives	7%	8%	2%
More Canadian subjects	6%	4%	17%
Availability	6%	5%	13%
Good quality/Well written	5%	5%	0%
Awareness of Canadian Authors/Publishers	4%	4%	6%
Interesting to read/themes/ appearance	4%	4%	4%
Other	16%	15%	20%
DK/Refused	43%	47%	25%

The following quotes elaborate on some of these themes:

- *“Budget: more money means more book-buying”*
- *“Money! I search for Canadian Books when I am buying for our library. I don’t have any problems finding the books I want, it is the budget available to purchase books.”*
- *“Government subsidy specifically to buy Canadian books.”*
- *“More direction from government and school boards as to availability and purchasing opportunities”*
- *“A single catalogue/listing of Canadian books with ISBN and publisher/wholesaler ordering information”*
- *“Book sellers who deal only in Canadian content”*
- *“Catalogues exclusively dedicated to Canadian authors and illustrators”*
- *“Have a list of books and authors and subject content- related to the curriculum.”*
- *“Have an all Canadian book publisher that only handles Canadian authors and titles. Especially in the non-fiction area.”*
- *“Having it promoted to me as Canadian when it appears in any kind of catalogue.”*
- *“Publish more. Drop the prices.”*
- *“Authors and publishers continuing to produce quality literature and non-fiction that responds to the needs of Canadian children.”*
- *“Availability of Canadian authored books in all subject areas”*
- *“The hardest part of purchasing Canadian content is the availability and cost. Many curriculum areas have few or no Canadian books available to meet the needs, or they’re way too expensive, so we have to go with American. If more suitable Canadian books were available at a reasonable cost, then I’d probably buy them.”*
- *“We buy as many as available. The problem is there aren’t enough Canadian titles WRITTEN on the topics we need (research books, not fiction).”*

- *“Canadian books related to the Ontario curriculum in high school would be the main way to encourage me to buy more.”*
- *“More curriculum related books at a variety of appropriate reading levels on specialized topics for high school.”*
- *“Canadian publishers do not seem to be publishing materials for Canadian geography and other non-fiction topics. We need more social science topics that reflect Canadian perspectives. The problem is not with fiction but mainly non-fiction. Too many wholesalers do not provide enough Canadian materials for us to buy. A lot of the content is American. Book Fairs are mainly targeting elementary schools and not enough secondary schools.”*
- *“Good quality non-fiction that relates to the curriculum and is written aimed at different academic levels”*
- *“Full-time trained librarians in school libraries instead of depending on the goodness of untrained/keen volunteers.”*
- *“Having a teacher librarian in the school. Currently this position is not funded.”*
- *“Kids DO choose books by their covers, so ensuring that books have cover art that appeals to them is important.”*
- *“Make them available, make them attractive and encourage more Canadian authors to write/publish!”*
- *“Publishers need to take a hard look at the physical appearance of the books they are printing. Paperback novels are an especially hard sell to students at the junior/intermediate level. They are perceived as having less attractive cover art and being unconventional in size in comparison to the American and British material available.”*
- *“Lower prices for author visits or support from the government or school boards to assist in the cost of author visits. Schools do not have much money to buy books and even less to have author visits which range from \$300 and up. Some libraries would prefer to spend that money on books rather than an author.”*

G. Communicating Information About Canadian Books to Libraries

Public Libraries

There was no consensus among respondents concerning the best way to get information about Canadian books to them. Overall, electronic means such as e-mail (18%) and Internet/Websites/Online (13%) were the most frequently mentioned methods. However, these appealed more to smaller libraries than large libraries. 28% of large libraries wanted to get information through the publishers compared to 10% of smaller libraries.

More respondents (13%) would prefer to receive information about Canadian books from publishers rather than from wholesalers or distributors (8%).

What is the best way to get information about Canadian books to you?

	Public Libraries Overall	Smaller Public Libraries	Large Public Libraries
E-mail (General)	18%	21%	6%
Internet/Website/Online (General)	13%	14%	6%
Mainstream Media (General)	12%	12%	11%
Reviews/ Book Reviews (General)	9%	9%	6%
Professional Journal/Quill and Quire	9%	8%	11%
Mail/Regular Mail	7%	8%	0%
Conferences/Meetings/Associations/ Board/Other Librarians	7%	7%	6%
Specifically Canadian Publications/Lists	6%	5%	17%
Catalogues (general)	6%	7%	0%
Flyers/Pamphlets/Newsletters	6%	6%	6%
Other	14%	17%	0%

Other potential sources of information about Canadian materials include the mainstream media (12%), book reviews (9%), and professional journals such as the Quill and Quire (9%). Some would like to receive information by regular mail (7%), or flyers, pamphlets or newsletters (6%).

Some specific suggestions include:

- *“Through my wholesaler. They do a good job with the materials they get but they just don't get material from many of the small presses. Helping those small presses get their books reviewed would be great.”*
- *“Publishers catalogues, newspapers and websites are what this library primarily consults. The publishers and wholesalers are aware of which authors, old or new, are Canadian and can indicate that if they choose. Bookstore and wholesaler websites could do the same with something like Google's radio button click for "Canadian sites". I believe people would use that feature, at least to inform themselves about the availability of Canadian material and to evaluate it for purchasing decisions.”*
- *“Perhaps publishers identifying Canadian authors clearly in their catalogues. Also, encouraging reputable reviewing journals to cover Canadian titles regularly”*
- *“A magazine which reviews Canadian material, I use Quill and Quire now but would like something similar to Booklist”*
- *“Email newsletter might be helpful. We subscribe to Quill and Quire and this helps. Try and read newspaper reviews and bookstore reviews as much as possible when we hear about a book.”*
- *“I already read Q&Q and Books in Canada. I would hate to see anything developed that would compete with their readership. Reviews or announcements could be sent in a monthly emailed newsletter through library services listserves.”*
- *“I like best book lists, such as those that appear at year's end in the Globe and Mail. Perhaps public libraries could also exchange lists of most frequently circulating Canadian titles, which might serve as an ordering guide. Or they could exchange book club picks with discussion questions included.”*

- *“Promotion, promotion, promotion - give us materials that we can immediately use as promotion in our libraries to make our patrons aware! Send us information online, make it brief but good”*
- *“Southern Ontario Library Service workshops and the OLA Superconference. Each Canadian children's book should have a Maple Leaf logo on it to help us select titles.”*
- *“Trade fairs, magazines, free bookmarks promoting your product - free posters too.”*
- *“Use SOLS as a communication vehicle”*

School Libraries

As with the public libraries, there was no consensus among respondents in school libraries concerning the best way to get information about Canadian books to them. Overall, electronic means such as e-mail (19%) and Internet/Websites/Online (14%) were the most frequently mentioned methods. Conferences/Meetings/Associations/Other librarians were mentioned by 16% of respondents, 13% suggested flyers/pamphlets/newsletters and 12% regular mail.

Catalogues were mentioned by 10% of respondents while 7% said professional journals such as the Quill and Quire.

Again, there was a slight preference for receiving information from publishers (6%) rather than wholesalers and distributors (5%).

What is the best way to get information about Canadian books to you?

	School Libraries Overall	Smaller School Libraries	Larger School Libraries
E-mail (General)	19%	20%	15%
Conferences/Meetings/Association/ Other Librarians	16%	15%	21%
Internet/Website/Online (General)	14%	15%	12%
Flyers/Pamphlets/Newsletters	13%	13%	12%
Mail/Regular Mail	12%	12%	13%
Catalogues (General)	10%	9%	15%
Professional Journals/Quill and Quire	7%	6%	12%
Book Reviews	6%	5%	10%
Specifically Canadian Publication/List/Book	6%	5%	6%
Mainstream Media (General)	5%	5%	4%
Other	23%	21%	31%

Canadian books that clearly states how they connect to the curriculum both in terms of subject and grade level. Specific suggestions for the best way to get information about Canadian books to school libraries include:

- *“Personal email, packages addressed to “teacher-librarian”, opportunities to see the books in person - I don’t like buying from catalogues because you can’t see what you are getting”*
- *“e-mail about new publications and new authors with information regarding curriculum connections, reviews of the book, recommended grade levels and other titles of the author.”*
- *“CLA and OLA listservs; a list of Canadian publishers and their content areas and grade levels.”*
- *“OLA website and magazines - other journals like Quill and Quire”*

- *“Develop a user friendly web site containing fiction and non-fiction Canadian titles searchable by author, keyword, curriculum area etc.”*
- *“Perhaps a web site dedicated to review/promotion of new and proven Canadian books and sources for acquiring these. Maybe a mailing list to interested participants that sign-up through the internet site.”*
- *“A display in a central location, OSLA superconference (presentation about Canadian books/ Canadian books marked at displays, etc.)”*
- *“Advertising in Quill & Quire, mailers and presence at big conferences, i.e. SuperConference in Toronto in Jan/Feb”*
- *“In boards that have Teacher-Librarians, we need to share our experience. More than half of our elementary schools have new Teacher-Librarians, mainly due to retirements. This means we have a lot of inexperienced people trying to make purchases and they aren't always aware of Canadian publishers and authors. Perhaps a kit giving an overview of Canadian authors and their books? Most of all, we need to help each other. Otherwise, we'll have schools full of Scholastic Book Fair books and nothing else.”*
- *“Canadian Publishing houses flyers and pamphlets. There need to be more Canadian publishers.”*
- *“At the start of each school year a list of new Canadian materials that have become available, how they connect with the curriculum, their prices and their publishers”*
- *“Perhaps having a catalogue of Canadian material. High schools need Canadian content to meet curriculum needs. Fiction is far easier to find.”*
- *“Catalogue or newsletter listing only Canadian content, author, etc - Canada's best either by Dewey subject for nonfiction and levels for fiction or some other method to indicate grade level/reading level/curriculum connections suggested. Many book vendors already do this and many indicate which books are Canadian - perhaps you could support their catalogues in this fashion and not need to print anything separate.”*

- *“A “Canadian Content Curriculum Connections” publication ...need to know which publishers deal with high degree of Canadian content...or On-line Catalogues with pictures and samples of the text and picture content identifying possible curriculum connections. Also catalogues sent in mail.”*
- *“We are drowning in paper and e-mails! Compile one list, clearly sorted, including French/English, target age/level, author, themes, connection to specific Ontario subject grades/strands, collection, publisher, price, where to buy, etc. Have it accessible on the Internet and update it on pre-announced regular dates.”*

H. Financial Data

To gain a better understanding of how much Public Libraries and School Libraries spend on various categories of materials (both Canadian and others), respondents were asked to provide financial data for library purchases for up to the last three years.

As was expected after conducting the first phase of this study, responses to the online survey confirm that librarians often do not have easy access to financial data, and very few track Canadian authored books. Even after repeated attempts and reminders, very few respondents were able to provide financial data beyond 2004. As a result, this section provides a breakdown for the 2004 financial data.

Public Libraries

In total, 125 public libraries responded to the survey, representing 70% of active library cardholders in Ontario. Of those, 98 (78%) provided at least some financial data for the 2004 fiscal year.

Overall, these 98 libraries reported a total of \$35,968,560 of expenditures on all library materials. These libraries had a total of 3,215,886 cardholders (63% of all active cardholders in Ontario) meaning that expenditure per cardholder averaged \$11.18. Using this figure of \$11.18 per active cardholder and a total Ontario Library population of 5,130,122 cardholders, we can estimate total library expenditures on materials in 2004 to be \$57,378,620.¹

A total of 47 libraries were able to provide information about their expenditures on Canadian materials. Taking into account the number of active cardholders and the total expenditures of these libraries, we can estimate that, overall, Ontario Public Libraries spent between 9% and 14% on Canadian material in 2004, that is between \$5,165,000 and \$8,033,000.

¹ This is in line with the results from the 2003 Ontario Ministry of Culture Libraries Survey in which Ontario libraries had total library materials expenditures of \$54,001,808 and 5,130,122 active cardholders, resulting in an average spend of \$10.53 per cardholder.

The following table summarizes the average spent per cardholder in the various categories where data was collected – for each category, the base size (number of responding libraries) and the total number of active cardholders in these libraries are also shown. It should be noted that because not all libraries answered each category, the totals do not sum correctly.

KEY 1st line = Average per cardholder e.g. 0.58
2nd line = Number of libraries responding e.g. n=76
3rd line = # active cardholders in these responding libraries e.g. (2,471,048)

ONTARIO PUBLIC LIBRARIES COLLECTION PURCHASES 2004 FISCAL YEAR				
	TOTAL		TOTAL CANADIAN-AUTHORED	
	Number of Titles	Total Expenditure	Number of Titles	Total Expenditure
TOTAL EXPENDITURES <i>(SEE DATA KEY ON PREVIOUS PAGE)</i>	0.58 n=76 (2,471,048)	\$11.18 n=98 (3,215,886)	0.06 n=47 (421,222)	\$1.05 n=47 (426,266)
BOOKS SUBTOTAL – of which...	0.18 n=63 (1,967,234)	\$8.69 n=80 (2,745,038)	0.04 n=36 (346,585)	\$0.75 n=35 (346,335)
Adult fiction	0.09 n=34 (1,298,650)	\$3.88 n=35 (2,181,903)	0.02 n=15 (237,491)	\$0.32 n=15 (237,491)
Adult reference	0.05 n=29 (438,343)	\$0.97 n=28 (961,713)	<0.005 n=11 (230,801)	\$0.19 n=10 (228,401)
Adult non-fiction (excludes reference)	0.15 n=28 (434,276)	\$2.61 n=29 (1,205,532)	0.02 n=9 (227,680)	\$0.58 n=9 (227,680)
Adult poetry, drama	<0.005 n=6 (210,375)	\$0.06 n=7 (312,089)	<0.005 n=6 (210,375)	\$0.03 n=6 (210,375)
Children's picture books – ages 4-8	0.01 n=24 (1,190,040)	\$1.45 n=24 (1,536,128)	<0.005 n=12 (230,707)	\$0.08 n=12 (230,707)
Children's fiction, other – ages 7-12	0.04 n=25 (415,650)	\$0.38 n=25 (930,287)	<0.005 n=11 (229,787)	\$0.06 n=11 (229,787)
Young adult fiction – ages 12+	0.01 n=23 (400,950)	\$0.19 n=26 (1,782,130)	<0.005 n=9 (228,035)	\$0.02 n=9 (228,035)
Children's and young adult reference	0.01 n=14 (343,730)	\$0.09 n=15 (613,319)	<0.005 n=6 (184,912)	\$0.04 n=6 184,912)
Children's non- fiction (excludes reference)	0.06 n=23 (431,723)	\$0.63 n=25 (953,257)	0.01 n=9 (227,435)	\$0.16 n=9 (227,435)
Young adult non-fiction (excludes reference)	<0.005 n=11 (261,445)	\$0.06 n=14 (619,704)	<0.005 n=8 (210,260)	\$0.01 n=8 (210,260)
Young adult graphic novels	0.01 n=11 (268,843)	\$0.10 n=13 (617,002)	<0.005 n=2 (186,250)	<\$0.005 n=2 (186,250)

Table continues on next page....

E-BOOKS SUBTOTAL	0.09 n=8 (287,934)	\$0.09 n=8 (303,418)	<0.005 n=1 (18,900)	<\$0.005 n=1 (18,900)
AUDIOBOOKS SUBTOTAL	0.01 n=41 (1,500,976)	\$0.38 n=45 (2,127,556)	<0.005 n=16 (259,529)	\$0.10 n=16 (259,529)
SOFTWARE AND SOFTWARE LICENCES e.g., on CD Rom, network SUBTOTAL of which...	<0.005 n=20 (308,814)	\$1.13 n=26 (2,011,749)	0.01 n=6 (194,143)	\$0.26 n=5 (191,643)
Games	<0.005 n=7 (27,628)	\$0.07 n=6 (26,228)	0.01 n=1 (300)	\$0.33 n=1 (300)
Educational	<0.005 n=10 (248,271)	\$0.81 n=10 (490,132)	<0.005 n=4 (198,528)	\$0.02 n=4 (198,528)
FEATURE FILMS, SHORTS AND TV PROGRAMS eg, on DVD, VHS SUBTOTAL of which....	0.01 n=39 (1,456,994)	\$0.91 n=46 (2,393,462)	0.01 n=17 (262,611)	\$0.11 n=16 (262,361)
Adult	0.07 n=17 (198,271)	\$0.83 n=23 (2,112,153)	<0.005 n=4 (9,975)	\$0.04 n=4 (9,975)
Children's	0.03 n=16 (198,121)	\$0.28 n=22 (2,112,003)	<0.005 n=4 (9,325)	\$0.05 n=3 (9,075)
MUSIC SUBTOTAL	0.01 n=21 (1,281,488)	\$0.45 n=24 (2,011,427)	0.01 n=9 (63,097)	\$0.16 n=8 (62,847)
PERIODICALS Print and digital formats SUBTOTAL	0.01 n=57 (1,400,235)	\$1.19 n=65 (2,455,522)	<0.005 n=42 (177,975)	\$0.22 n=32 (125,003)

The following table shows a detailed breakdown of Ontario Public Library book purchases as a percentage of their total book purchases.

ONTARIO PUBLIC LIBRARY BOOK PURCHASES – 2004 FISCAL YEAR				
	% of All Book Titles	% of Dollars Spent on All Books	% of Canadian Book Titles	% of Dollars Spent on Canadian Books
BOOKS SUBTOTAL – of which...				
Adult fiction	19%	37%	26%	21%
Adult reference	11%	9%	7%	13%
Adult non-fiction (excludes reference)	34%	25%	36%	38%
Adult poetry, drama	<0.5%	1%	2%	2%
Children's picture books – ages 4-8	3%	14%	6%	5%
Children's fiction, other – ages 7-12	10%	4%	5%	4%
Young adult fiction – ages 12+	3%	2%	3%	2%
Children's and young adult reference	2%	1%	3%	3%
Children's non-fiction (exc. ref)	15%	6%	11%	11%
Young adult non-fiction (exc. ref.)	1%	1%	1%	1%
Young adult graphic novels	3%	1%	<0.5%	<0.5%

School Libraries

Of the 309 schools that responded to the survey (representing 6% of the schools in Ontario), 109 (35%) provided at least some financial data for the 2004 fiscal year.

Overall, these 109 School Libraries, which together have 79,069 students, reported a total of \$1,029,898 in total materials expenditures. This equates to \$13.03 per student.

Eighty-nine (89) school libraries with 63,764 students provided overall materials expenditures for Canadian authored materials. The total value reported was \$245,326, equivalent to \$3.85 worth of Canadian authored library materials per student.

Taking into account the number of students and the total expenditures of these responding School Libraries, we can estimate that, overall, School Libraries spent between 30% and 32% of their materials budgets on Canadian material in 2004.

The following table summarizes the average spent per student in the various categories where data was collected – for each category; the base size (number of responding school libraries) is also shown. It should be noted that because not all school libraries answered each category, the totals do not sum correctly.

KEY: 1st line = Average per student e.g. 1.07
2nd line = Number of schools responding e.g. n=95
3rd line = Number of students in these responding schools e.g. (69,992)

SCHOOL LIBRARIES COLLECTION PURCHASES 2004 FISCAL YEAR				
<i>(SEE DATA KEY ON PREVIOUS PAGE)</i>	TOTAL		TOTAL CANADIAN-AUTHORED	
	Number of Titles	Total Expenditure	Number of Titles	Total Expenditure
TOTAL EXPENDITURES	1.07 n=95 (69,992)	\$13.03 n=109 (79,069)	0.30 n=86 (61,969)	\$3.85 n=89 (63,764)
BOOKS SUBTOTAL – of which...	1.15 n=76 (54,150)	\$12.78 n=87 (61,193)	0.32 n=72 (50,799)	\$4.04 n=75 (52,424)
Adult fiction	0.08 n=50 (34,906)	\$0.82 n=48 (32,676)	0.03 n=45 (31,133)	\$0.37 n=46 (31,913)
Adult reference	0.04 n=47 (30,456)	\$1.40 n=45 (29,776)	0.01 n=43 (28,823)	\$0.20 n=43 (29,013)
Adult non-fiction (excludes reference)	0.08 n=47 (31,769)	\$1.73 n=45 (29,539)	0.01 n=40 (26,421)	\$0.25 n=41 (26,761)
Adult poetry, drama	0.01 n=45 (30,589)	\$0.10 n=44 (28,949)	<0.005 n=39 (25,941)	\$0.11 n=40 (26,281)
Children's picture books – ages 4-8	0.18 n=61 (42,997)	\$1.82 n=55 (35,337)	0.06 n=51 (32,583)	\$0.78 n=49 (30,658)
Children's fiction, other – ages 7-12	0.19 n=57 (36,682)	\$1.40 n=50 (30,177)	0.08 n=49 (29,257)	\$0.60 n=46 (27,162)
Young adult fiction – ages 12+	0.21 n=54 (34,803)	\$1.69 n=51 (32,083)	0.08 n=50 (30,663)	\$0.65 n=50 (31,393)
Children's and young adult reference	0.05 n=44 (28,305)	\$1.26 n=43 (27,235)	0.01 n=38 (23,865)	\$0.20 n=39 (24,845)
Children's non-fiction (excludes reference)	0.23 n=52 (33,172)	\$3.74 n=48 (28,612)	0.09 n=43 (26,987)	\$1.90 n=41 (25,312)
Young adult non-fiction (excludes reference)	0.26 n=45 (29,563)	\$2.19 n=42 (26,868)	0.03 n=40 (24,998)	\$0.34 n=39 (23,853)
Young adult graphic novels	0.03 n=57 (40,510)	\$0.43 n=54 (37,365)	<0.005 n=45 (29,918)	\$0.09 n=43 (28,348)

Table continues on next page....

E-BOOKS SUBTOTAL	0.01 n=76 (62,591)	\$0.09 n=62 (46,929)	<0.005 n=55 (42,859)	\$0.02 n=56 (42,534)
AUDIOBOOKS SUBTOTAL	<0.005 n=81 (65,374)	\$0.07 n=67 (50,710)	<0.005 n=61 (46,715)	\$0.01 n=57 (44,123)
SOFTWARE AND SOFTWARE LICENCES e.g., on CD Rom, network SUBTOTAL of which...	0.02 n=75 (60,907)	\$0.87 n=69 (55,130)	<0.005 n=61 (48,390)	\$0.33 n=60 (46,030)
Games	<0.005 n=57 (46,872)	<\$0.005 n=47 (33,929)	<0.005 n=45 (33,319)	<\$0.005 n=46 (33,669)
Educational	<0.005 n=56 (42,347)	\$0.78 n=46 (34,499)	<0.005 n=46 (34,269)	\$0.27 n=44 (31,799)
FEATURE FILMS, SHORTS AND TV PROGRAMS eg, on DVD, VHS SUBTOTAL of which....	0.01 n=74 (57,973)	\$0.54 n=65 (48,195)	<0.005 n=55 (40,870)	\$0.10 n=55 (40,005)
Adult	0.02 n=36 (21,691)	\$0.33 n=34 (20,598)	0.01 n=32 (19,978)	\$0.13 n=32 (19,978)
Children's	0.03 n=42 (28,876)	\$1.40 n=37 (23,644)	0.01 n=34 (20,634)	\$0.36 n=33 (19,194)
MUSIC SUBTOTAL	<0.005 n=65 (49,790)	\$0.05 n=56 (40,528)	<0.005 n=50 (37,233)	\$0.02 n=52 (36,868)
PERIODICALS Print and digital formats SUBTOTAL	0.03 n=73 (53,327)	\$1.02 n=72 (52,908)	0.01 n=66 (49,174)	\$0.28 n=62 (45,144)

The following table shows a detailed breakdown of School Library book purchases as a percentage of their total book purchases.

SCHOOL LIBRARY BOOK PURCHASES – 2004 FISCAL YEAR				
BOOKS SUBTOTAL – of which...	% of All Book Titles	% of Dollars Spent on All Books	% of Canadian Book Titles	% of Dollars Spent on Canadian Books
Adult fiction	6%	5%	7%	7%
Adult reference	3%	8%	2%	4%
Adult non-fiction (excludes reference)	6%	10%	3%	5%
Adult poetry, drama	1%	1%	1%	2%
Children's picture books – ages 4-8	13%	11%	15%	14%
Children's fiction, other – ages 7-12	14%	8%	19%	11%
Young adult fiction – ages 12+	15%	10%	19%	12%
Children's and young adult reference	4%	8%	4%	4%
Children's non-fiction (exc. ref)	17%	23%	22%	35%
Young adult non-fiction (exc. ref.)	20%	13%	8%	6%
Young adult graphic novels	2%	3%	1%	2%

Technical Notes:

These averages are calculated by summing the values of the libraries that answered a particular category and dividing it by the total number of active cardholders (or students) in those same libraries. For instance if 10 libraries answered a category and their combined expenditure was \$100,000 and they had a total of 200,000 active cardholders (or students), the average per active cardholder (or student) would be calculated as $\$100,000/200,000 = \0.50

The majority of Ontario Public Libraries indicate that their Fiscal Year begins in January.

Only 8 public libraries provided any financial data for the 2003 financial year and none of them provided details of their expenditures on Canadian materials, and four libraries provided their total materials expenditures for 2002 - too few to report on.

The majority of School Libraries indicate that their Fiscal Year starts in September.

Only 10 schools reported any financial data for the 2003, and two schools provided any data for the 2002 fiscal year.

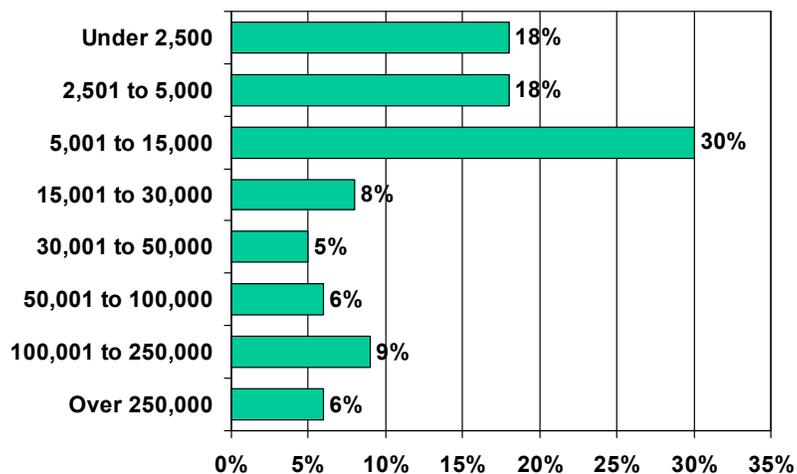
I. Library and Respondent Profiles

Public Libraries

In all, 125 Ontario Public Libraries responded to the survey, representing 70% of active library cardholders in Ontario. These include 21 of the 31 largest libraries in Ontario, including 16 of 19 Ontario CULC (Canadian Urban Libraries Council) libraries.

Just over a third (36%) serve populations of 5,000 or less. Two-thirds (66%) of the Public Libraries responding to the survey serve populations of 15,000 or less, and 15% serve populations of 100,000 or more.

Population Served by Library (Overall)



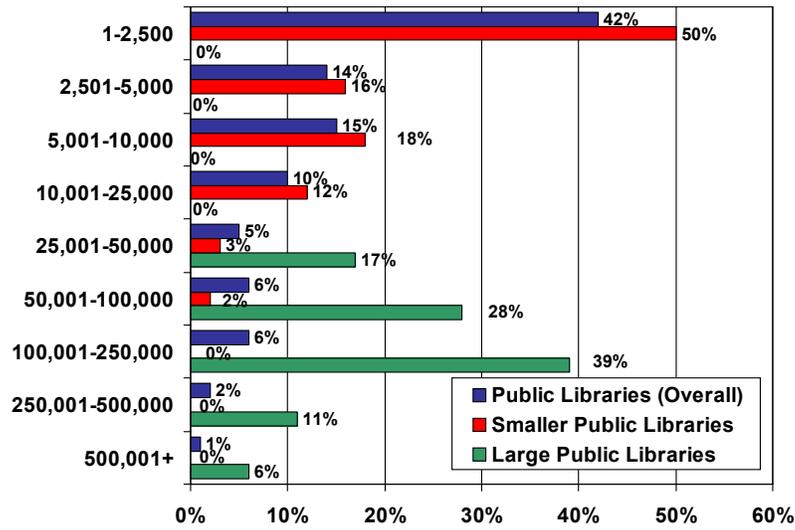
Q.

What is the total population served by your library?

Overall, the 125 libraries that responded to the survey had a total of 3,574,605 active cardholders (defined as people who have used their library card in the past 2 years). The Ontario Ministry of Culture Ontario Library Statistics Summary indicated that in 2003, Ontario Libraries had a total of 5,130,122 active cardholders. The libraries that responded to the POLLARA survey account for 70% of these cardholders.

The plurality (42%) of Public Libraries that responded to the survey reported having 2,500 or fewer active cardholders. Just under a third (29%) have between 2,501 and 10,000 active cardholders, 21% have between 10,001 and 100,000 active cardholders while 9% have over 100,000 active cardholders.

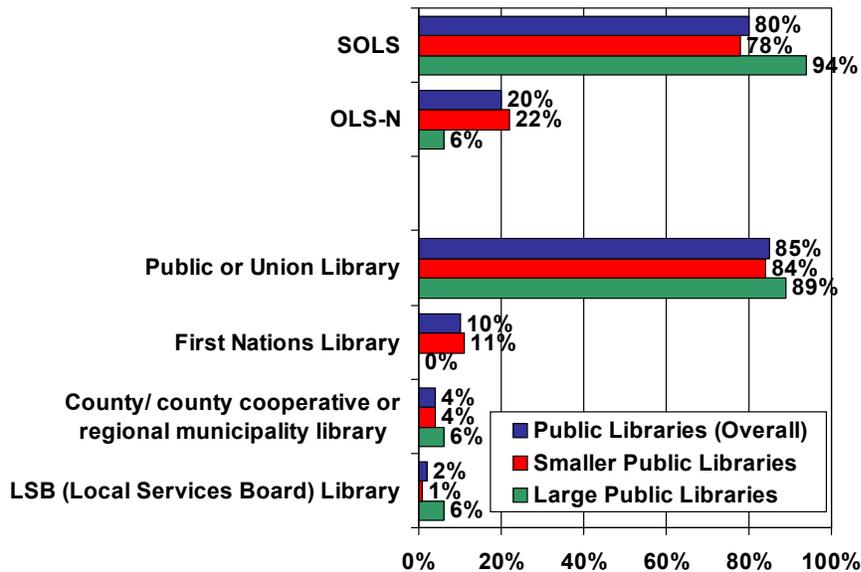
Number of Active Cardholders



Q. Number of Active Library Cardholders (How many have used their library card in the past 2 years)?

80% of the Ontario Public Libraries that responded to the survey come under the Southern Ontario Library Service (SOLS) region. The vast majority of Public Libraries (85%) were either Public or Union Libraries and 10% were First Nations Libraries.

Public Library Profile

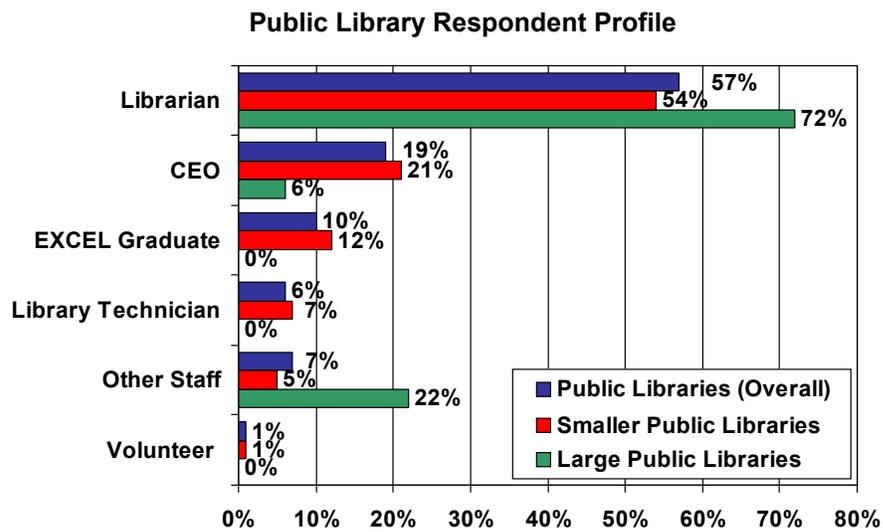


OLS Region and Type of Library Service

Q.

The majority (57%) of survey respondents indicated that their position in the library is Librarian. One in five (19%) surveys were completed by the Library CEO while 10% were completed by staff who are EXCEL Graduates.

72% of surveys submitted by the large libraries were completed by a librarian, compared to 54% in the smaller libraries. The library CEO was more likely to be the member of staff answering the survey in the smaller libraries (21%) than in the large libraries (6%).



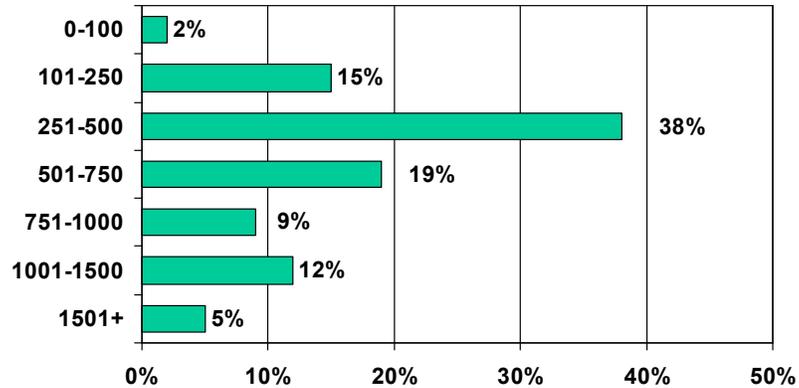
Q. Q.

What is your position in the library?

School Libraries

The Ontario Schools that responded to the survey had, on average, 615 pupils each. The plurality of schools (38%) had between 251 and 500 pupils. Almost one in five (17%) had 250 or fewer pupils while an equal number (17%) had over 1000 pupils.

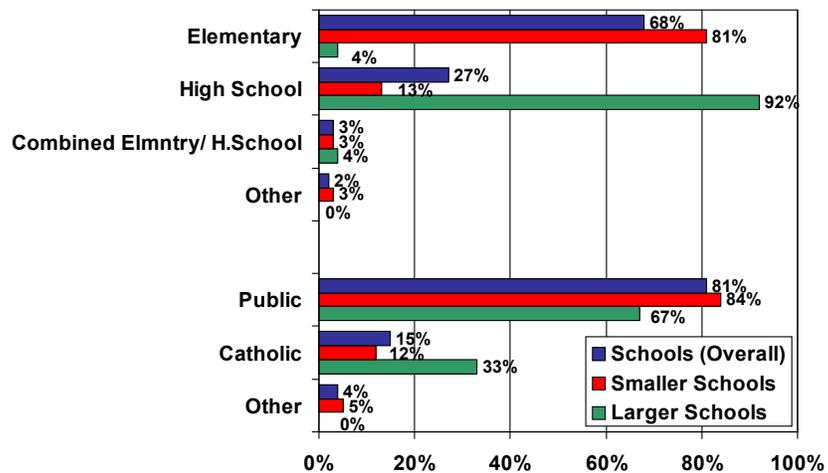
Number of Pupils Attending the School



Q. How many students attend this school?

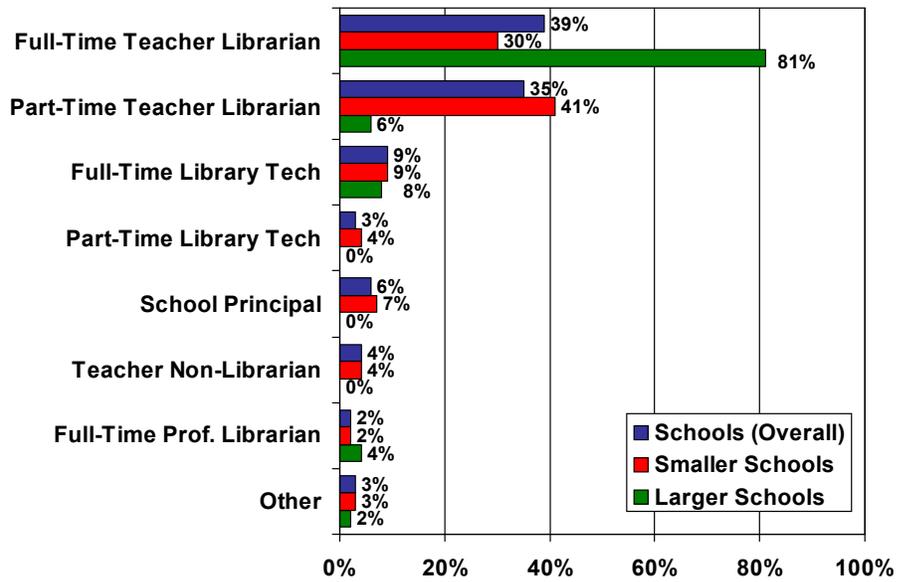
Just over two-thirds (68%) of the schools responding to the survey were elementary school while 27% were high schools. 81% of responding schools were Public Schools and 15% were Catholic Schools. The remaining 4% were independent schools.

Type of School



The majority of respondents to the School Library survey were either full-time (39%) or part-time (35%) teacher librarians. The survey was significantly more likely to be completed by a full-time teacher librarian in the larger schools (81%) than in the smaller schools (30%). The smaller schools were more likely to have a part-time teacher librarian complete the survey (41%) than were the larger schools (6%).

School Library Respondent Profile



What is your position in the school?

Q.

V. Conclusions and Recommendations

No Common Process and the Role of Wholesalers

There is no common acquisition process among public and school libraries, making it difficult for the publishing industry to use a systematic approach to market to this community. The majority of public library and school library purchases, however, are made through wholesalers (or “jobbers”).

As a result, wholesalers play an important role in title selection and acquisition. They deliver two important benefits to under-staffed and under-budgeted libraries: the convenience of one-stop shopping and volume discounts. Many publishers direct their marketing effort at them, and it is important that they continue to work in close collaboration with wholesalers.

Factors Driving Title Selection

It is important, however, to continue to also direct marketing and communication efforts to a larger audience. Indeed, patron requests are the most important factors driving book selection decisions in public libraries, and awards and nominations, as well as book reviews, also play a significant role for all decision-makers and influencers. Curriculum connection is considered most important in school libraries.

Low Awareness of Canadian Authors

The difficulty in identifying which books and authors are Canadian represents the greatest obstacle, along with budget cutbacks, to increasing the number of Canadian books being purchased.

In addition, the majority of libraries are unable to indicate the percentage of Canadian authored books in their collections. One of the problems with tracking and measuring Canadian authorship within current library collections is that there is no standard definition of what constitutes a Canadian author.

It is crucial for the publishing industry to develop a definition of what constitutes a Canadian author and then develop a tracking code that will allow for all Canadian sales to be flagged through the acquisition and cataloguing process. When the television industry faced a similar challenge some time ago, television stations cooperated to develop codes for tracking Canadian content.

Publishers and wholesalers should jointly develop such an agreed upon definition and related codes. In addition to the measurement of Canadian book sales, a common definition will also allow for better identification and focus on Canadian books in the promotion and marketing process.

Library Purchases

The library community represents an important market for the book publishing industry. Total public library expenditures on materials in 2004 is estimated at \$57,378,620, and the average materials expenditure in school libraries is estimated to be \$13.03 per student. Based on the information collected from the libraries that were able to provide an estimate, the overall percentage of Canadian books in library collections is estimated to be approximately 26% among public libraries and 34% among school libraries.

Communicating with Librarians

In communicating with librarians, electronic means such as email and Internet would be best received. A monthly newsletter emailed through library service listserves and other similar services would be a good channel. General media, book reviews and journals remain good sources of information for librarians.

Recommendations

Based on the findings of the study, we would recommend that the following initiatives be undertaken to encourage librarians to buy more Canadian books, and to assist the industry in measuring sales of Canadian books:

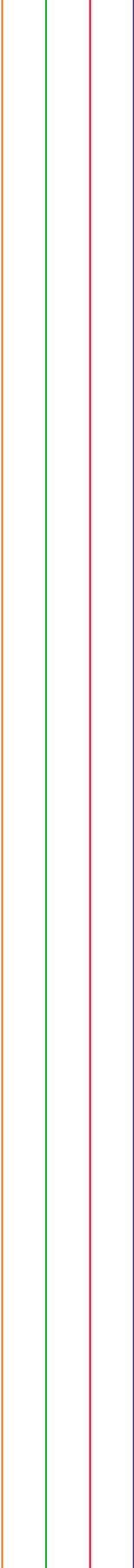
- As mentioned earlier in this summary, one of the priorities is to first develop an industry-accepted definition of what constitutes a Canadian author – Is it someone who was born in Canada? Someone who lives in Canada? Someone who is published by a Canadian publisher? (For example, one of the wholesalers said that they measure Canadian authorship using a set of criteria such as Canadian Publisher, Canadian Author, Canadian Illustrator and Canadian Content. If the book satisfies at least two of these criteria, it is considered Canadian.) Publishers and wholesalers need to cooperate to develop this definition.
- Once a definition of “Canadian book/author” has been agreed to, a process needs to be initiated to systematically track sales of Canadian books throughout the acquisition and cataloguing process. Publishers’ and wholesalers’ inventory and shipping software programs should be adapted to include a “Canadian code” developed from the definition, to flag all Canadian sales at the distribution point. The detailed description

of books provided at the source (ISBN, etc.) could also include this Canadian code so that it would be tracked through the entire selling and cataloguing process by publishers, wholesalers and librarians.

- Increased marketing and promotional efforts focused specifically on Canadian titles:
 - marketing efforts aimed at increasing awareness of Canadian authors should target all the various decision-makers and influencers, including librarians and other library staff, CEO's of public libraries, school principals, wholesalers and distributors, as well as the general public – *“more marketing aimed at readers and clientele...”*, *“higher profile would lead to more patron requests”*
 - provide libraries with materials that can be immediately used as promotion to increase awareness among their readers (free posters, bookmarks, etc.)
 - because of the importance of word-of-mouth in marketing books to librarians, *“creating a buzz”* is key – through promotional activities and getting positive reviews that will get people talking
 - assist libraries in arranging author visits
 - make more information and reviews about Canadian books available on the Internet
- Make it easier to identify Canadian books – identify books more clearly in showrooms and catalogues. Aside from offering separate sections exclusively for Canadian books, this could be done by adding a (maple leaf) logo to the publications and on the books themselves to clearly identify books as Canadian. Relevant websites could also include a “Canadian books” button on which users could click for information specific to Canadian books.
- Provide libraries with resources that will help them identify and track Canadian authorship. This could include making available stickers of the logo mentioned above, to be affixed directly on Canadian books so that library staff and readers will immediately know that a book is Canadian. In addition, software programs that will facilitate tracking Canadian content in their collections might be developed to assist libraries.
- To increase marketing efficiencies, encourage and help publishers to communicate and promote electronically. As a marketing tool, the

medium is relatively new for many. Provide support and training for publishers on how to use the Internet effectively to communicate, promote, and to bring members of their target markets (librarians, general public, etc.) to visit their websites.

- Create a “one-stop service”, preferably on-line, that would allow librarians to source Canadian material, get the information they need to make a purchasing decision (including ISBN and all publisher/wholesaler ordering information, etc.), order, and even pay online – all in one easy visit to a single website with appropriate links.
- School libraries would like to see more books that relate to their curriculum so they don’t have to buy American books to fill the needs. Curriculum-related content should also be clearly identified: web sites should be searchable by curriculum areas and grade levels, as well as titles, authors, etc.
- Ensure that books and their covers are attractive – *“kids DO choose books by their covers”, “paperback novels are a ... hard sell to students at the junior/intermediate level...”*
- Support a continuing positive collaboration between wholesalers and publishers.



VI. Appendices

A. Public Library Questionnaire

OBPO/OMDC SURVEY ON-LINE PUBLIC LIBRARY SURVEY QUESTIONNAIRE

FIRST SCREEN – INTRODUCTION

The Organization of Book Publishers of Ontario (OBPO), through the support of the Ontario Media Development Corporation (OMDC), has retained the services of POLLARA, a market research firm, to undertake a study investigating the purchases and purchase decisions of Ontario's public libraries and public school libraries.

The aggregate results of the study will be made available to participants. Of course, to respect the privacy of individual respondents, all specific information collected will remain strictly confidential – only POLLARA will have access to the data.

In all questions, please try to fill in as many categories as you can, choosing the category that is most appropriate. If you do not have access to accurate statistics, please try to make an informed estimate.

Thank you for taking the time to fill out this survey. We would like to ask you to respond by November 30, 2005.

Once you have begun filling in the survey, if you need to stop and wish to continue later, you can scroll down to the bottom of the page and click on the submit button. You will be taken to a page containing an address. Bookmarking this page will not allow you to resume the survey, you will need to copy or write this address down to use later to access the survey again

ABOUT THE LIBRARY

Q. Legal Name of the Library:

Q. Postal Code

Q. Ontario Library Service (OLS) Region

Ontario Library Service – North (OLS-N)
Southern Ontario Library Service (SOLS)

Q. Type of Library Service

Public or Union Library
First Nations Library
County/ county cooperative or regional municipality library
LSB (Local Services Board) Library

Q. Number of Active Library Cardholders (How many have used their library card in the past 2 years) _____

Q. What is the total population served by your library

Under 2,500
2,501 to 5,000
5,001 to 15,000
15,001 to 30,000
30,001 to 50,000
50,001 to 100,000
100,001 to 250,000
Over 250,000

ABOUT YOU

Q. What is your position in the library?

Librarian (Hold a degree in library/information science from an accredited school e.g. MLS, MIS, MLIS)
Library Technician (Hold a diploma in library techniques from a community college)
EXCEL Graduate (Hold an EXCEL certificate)
Other Staff (All other staff not included above)
Volunteer
Other (specify) _____

COLLECTION DEVELOPMENT

Q. Approximately what percentage of your collection purchases are made through the following sources?

Wholesalers _____ %
 Direct from publisher _____ %
 Internet sites (e.g. Amazon) _____ %
 Bookstores (e.g. Chapters, Indigo) _____ %
 Other (specify) _____ %

Q. Please indicate to what extent each of the following factors influences your library's book selection decisions. Do they strongly influence book selection decisions, somewhat influence book selection decisions, or do they not influence book selection decisions?

INFLUENCE ON BOOK SELECTION DECISION →	Strongly Influence	Somewhat influences	Does not influence
Staff requests			
Patron requests			
Immediate availability (not having to wait for stock)			
Canadian content, setting, themes			
Canadian author			
Canadian illustrator			
Author visit to library			
Book reviews			
Books Awards/Nominations			
Wholesaler Catalogues			
Wholesaler recommendations			
Bookstore recommendations			
Publisher catalogues			
Publisher recommendations			
Speed/Ease of ordering			
Relationship with salesperson			
Price			

CANADIAN BOOKS

Please indicate how strongly you agree or disagree with the following statements using a scale from 1 to 10 where 1 means you strongly disagree and 10 means strongly agree.

- Q. It is important to have Canadian books in public libraries
 - Q. It is important to encourage the writing and publishing of Canadian books.
 - Q. The loss of Canadian publishers would lead to a diminishment of Canadian culture.
 - Q. Canadian values are different and this is reflected in our fiction and non-fiction literature.
 - Q. Canadian books better reflect our culture, history and heritage
 - Q. Canadian books reflect our values, perspectives, identity and pride
 - Q. Children need to know that Canadians can be authors and illustrators who can make a living.
 - Q. Children need to see themselves in books, to connect with settings and characters and to understand the diversity and richness of Canada.
 - Q. Canadian authors and illustrators are excellent.
 - Q. High quality books are published in Canada
-
- Q. Overall, what percentage of books in your library collection is Canadian authored?
(ENTER PERCENTAGE)
 - Q. Compared to five years ago, would you say that the proportion of books in your collection that are Canadian authored has increased, decreased or remained the same?
 - Q. IF INCREASED OR DECREASED AT PREVIOUS QUESTION. Why has it increased/decreased? OPEN ENDED
 - Q. What are the barriers to having more Canadian authored books in public libraries?
(SELECT ALL THAT APPLY)
 - Budget cutbacks
 - Canadian books more expensive than others
 - Low awareness of Canadian books
 - Difficulty in identifying Canadian authors
 - Rely on supplier for selection
 - There are no barriers
 - Other (specify)

How effective do you think each of the following factors would be in encouraging you to purchase more Canadian content for your library? Please use a scale from 1 to 10 where 1 means completely ineffective and 10 means extremely effective.

- Q. Government guidelines requiring public libraries to allocate a certain percentage of their budget to Canadian publications.
- Q. Having a logo to clearly identify books as Canadian
- Q. Canadian author visits to public libraries
- Q. More information/reviews about Canadian books on the Internet
- Q. More awards for Canadian books.
- Q. Marketing to make librarians more aware of which authors are Canadian.

- Q. What other factors, if any, would encourage you to purchase more Canadian content for your library? (Open ended)

- Q. What is the best way to get information about Canadian books to you? (Open ended)

COLLECTION PURCHASES

Q. What is the starting month of your fiscal year? (*enter month:*)

On the following page, please provide information in as many categories as possible. We realise that you may not have exact figures available – in which case please submit a “best estimate”, or at least fill in the sub-total for the category.

Please provide your most recent year’s data although if you can also fill this out for the past 3 years, that would be greatly appreciated.

Once you have begun filling in the survey, if you need to stop and wish to continue later, you can scroll down to the bottom of the page and click on the submit button. You will be taken to a page containing an address. Bookmarking this page will not allow you to resume the survey, you will need to copy or write this address down to use later to access the survey again

COLLECTION PURCHASES 2004 FISCAL YEAR				
		TOTAL		HOW MUCH OF THE TOTAL IS CANADIAN-AUTHORED? (IF POSSIBLE)
		Number of Titles	Total Expenditure	Number of Titles
			\$	Total Expenditure
				\$
TOTAL EXPENDITURES				
BOOKS SUBTOTAL				
Of Which	Adult fiction		\$	\$
	Adult reference		\$	\$
	Adult non-fiction (excludes reference)			
	Adult poetry, drama		\$	\$
	Children's picture books – ages 4-8		\$	\$
	Children's fiction, other – ages 7-12		\$	\$
	Young adult fiction – ages 12+		\$	\$
	Children's and young adult reference		\$	\$
	Children's non-fiction (excludes reference)		\$	\$
	Young adult non-fiction (excludes reference)		\$	\$
	Young adult graphic novels		\$	\$
E-BOOKS				
AUDIOBOOKS				
SOFTWARE AND SOFTWARE LICENCES (e.g., on CD Rom, network) SUBTOTAL				
Of Which	Games		\$	\$
	Educational		\$	\$
FEATURE FILMS, SHORTS AND TV PROGRAMS (eg., on DVD, VHS) SUBTOTAL				
Of Which	Adult		\$	\$
	Children's		\$	\$
MUSIC				
PERIODICALS (Print and digital formats)				

REPEAT TABLE FOR 2003 and 2002 FISCAL YEARS.

Q. Finally, do you have any other comments you would like to make? (OPEN ENDED)

THANK YOU FOR TAKING THE TIME TO FILL OUT THE SURVEY.

B. School Library Questionnaire

OBPO/OMDC SURVEY ON-LINE SCHOOL LIBRARY SURVEY QUESTIONNAIRE

FIRST SCREEN – INTRODUCTION

The Organization of Book Publishers of Ontario (OBPO), through the support of the Ontario Media Development Corporation (OMDC), has retained the services of POLLARA, a market research firm, to undertake a study investigating the purchases and purchase decisions of Ontario's public libraries and public school libraries.

The aggregate results of the study will be made available to participants. Of course, to respect the privacy of individual respondents, all specific information collected will remain strictly confidential – only POLLARA will have access to the data.

In all questions, please try to fill in as many categories as you can, choosing the category that is most appropriate. If you do not have access to accurate statistics, please try to make an informed estimate.

Thank you for taking the time to fill out this survey. We would like to ask you to respond by November 30, 2005.

Once you have begun filling in the survey, if you need to stop and wish to continue later, you can scroll down to the bottom of the page and click on the submit button. You will be taken to a page containing an address. Bookmarking this page will not allow you to resume the survey, you will need to copy or write this address down to use later to access the survey again

ABOUT THE SCHOOL

Q. Is your school:

- Elementary
- High School
- Combined Elementary/High School
- Other (Specify) _____

Q. Is the school:

- Catholic
- Public
- Other (Specify)

Q. How many students attend this school? _____

Q. Does the school have a library?

- Yes – CONTINUE
- No – TERMINATE

ABOUT YOU

Q. What is your position in the school?

- School Principal
- Clerical Staff
- Teacher Non-Librarian
- Full-Time Teacher Librarian
- Part-Time Teacher Librarian
- Full-Time Professional Librarian
- Part-Time Professional Librarian
- Full-Time Library Technician
- Part-Time Library Technician
- Other (specify) _____

COLLECTION DEVELOPMENT

Q. Approximately what percentage of your collection purchases are made through the following sources?

- Wholesalers _____ %
- Direct from publisher _____ %
- Internet sites (e.g. Amazon) _____ %
- Bookstores (e.g. Chapters, Indigo) _____ %
- Other (specify) _____ %

Q. Please indicate to what extent each of the following factors influences your library's book selection decisions. Do they strongly influence book selection decisions, somewhat influence book selection decisions, or do they not influence book selection decisions?

INFLUENCE ON BOOK SELECTION DECISION →	Strongly Influence	Somewhat influences	Does not influence
Teacher requests			
Student requests			
Curriculum connection			
Immediate availability (not having to wait for stock)			
Canadian content, setting, themes			
Canadian author			
Canadian illustrator			
Author visit to school			
Book reviews			
Books Awards/Nominations			
Wholesaler Catalogues			
Wholesaler recommendations			
Bookstore recommendations			
Publisher catalogues			
Publisher recommendations			
Speed/Ease of ordering			
Relationship with salesperson			
Price			

CANADIAN BOOKS

Please indicate how strongly you agree or disagree with the following statements using a scale from 1 to 10 where 1 means you strongly disagree and 10 means strongly agree.

- Q. It is important to have Canadian books in school libraries
 - Q. It is important to encourage the writing and publishing of Canadian books.
 - Q. The loss of Canadian publishers would lead to a diminishment of Canadian culture.
 - Q. Canadian values are different and this is reflected in our fiction and non-fiction literature.
 - Q. Canadian books better reflect our culture, history and heritage
 - Q. Canadian books reflect our values, perspectives, identity and pride
 - Q. Children need to know that Canadians can be authors and illustrators who can make a living.
 - Q. Children need to see themselves in books, to connect with settings and characters and to understand the diversity and richness of Canada.
 - Q. Canadian authors and illustrators are excellent.
 - Q. High quality books are published in Canada
-
- Q. Overall, what percentage of books in your school library collection is Canadian authored? (ENTER PERCENTAGE)
 - Q. Compared to five years ago, would you say that the proportion of books in your collection that are Canadian authored has increased, decreased or remained the same?
 - Q. IF INCREASED OR DECREASED AT PREVIOUS QUESTION. Why has it increased/decreased? OPEN ENDED
 - Q. What are the barriers to having more Canadian authored books in school libraries? (SELECT ALL THAT APPLY)
 - Budget cutbacks
 - Canadian books more expensive than others
 - Low awareness of Canadian books
 - Difficulty in identifying Canadian authors
 - Rely on supplier for selection
 - There are no barriers
 - Other (specify)

How effective do you think each of the following factors would be in encouraging you to purchase more Canadian content for your school library? Please use a scale from 1 to 10 where 1 means completely ineffective and 10 means extremely effective.

- Q. Government guidelines requiring schools libraries to allocate a certain percentage of their budget to Canadian publications.
- Q. Having a logo to clearly identify books as Canadian
- Q. Canadian author visits to school libraries
- Q. More information/reviews about Canadian books on the Internet
- Q. More awards for Canadian books.
- Q. Marketing to make librarians more aware of which authors are Canadian.

- Q. What other factors, if any, would encourage you to purchase more Canadian content for your library? (Open ended)

- Q. What is the best way to get information about Canadian books to you? (Open ended)

COLLECTION PURCHASES

Q. What is the starting month of your fiscal year? (*enter month:*)

On the following page, please provide information in as many categories as possible. We realise that you may not have exact figures available – in which case please submit a “best estimate”, or at least fill in the sub-total for the category.

Please provide your most recent year’s data although if you can also fill this out for the past 3 years, that would be greatly appreciated.

Once you have begun filling in the survey, if you need to stop and wish to continue later, you can scroll down to the bottom of the page and click on the submit button. You will be taken to a page containing an address. Bookmarking this page will not allow you to resume the survey, you will need to copy or write this address down to use later to access the survey again

COLLECTION PURCHASES 2004/05 FISCAL YEAR				
		TOTAL		HOW MUCH OF THE TOTAL IS CANADIAN-AUTHORED? (IF POSSIBLE)
		Number of Titles	Total Expenditure	Number of Titles
			\$	Total Expenditure
				\$
TOTAL EXPENDITURES			\$	\$
BOOKS SUBTOTAL			\$	\$
Of Which	Adult fiction		\$	\$
	Adult reference		\$	\$
	Adult non-fiction (excludes reference)			
	Adult poetry, drama		\$	\$
	Children's picture books – ages 4-8		\$	\$
	Children's fiction, other – ages 7-12		\$	\$
	Young adult fiction – ages 12+		\$	\$
	Children's and young adult reference		\$	\$
	Children's non-fiction (excludes reference)		\$	\$
	Young adult non-fiction (excludes reference)		\$	\$
	Young adult graphic novels		\$	\$
E-BOOKS			\$	\$
AUDIOBOOKS			\$	\$
SOFTWARE AND SOFTWARE LICENCES (e.g., on CD Rom, network) SUBTOTAL			\$	\$
Of Which	Games		\$	\$
	Educational		\$	\$
FEATURE FILMS, SHORTS AND TV PROGRAMS (eg., on DVD, VHS) SUBTOTAL			\$	\$
Of Which	Adult		\$	\$
	Children's		\$	\$
MUSIC			\$	\$
PERIODICALS (Print and digital formats)			\$	\$

REPEAT TABLE FOR 2003 and 2002 FISCAL YEARS.

Q. Finally, do you have any other comments you would like to make? (OPEN ENDED)

THANK YOU FOR TAKING THE TIME TO FILL OUT THE SURVEY.