



# Public Opinion on the Value of Books in the English Language Book Sector

## **SUMMARY REPORT**

Submitted to:

The Book Strategy Group  
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## Study Products:

This Summary Report is one of five documents produced for this study. The other four documents include reports on:

- ◇ Marketing, Library usage, illegal downloading and publishing
- ◇ Usage and Value
- ◇ Public Opinion on the Value of Books in the Education Book Sector
- ◇ Appendix Material: Consultation Instruments Report



# 1. BACKGROUND

The Book Strategy Group (BSG), an ad hoc committee representing the interests of Canadian writers and publishers, commissioned public opinion research on current attitudes of English-speaking Canadians about the cultural and economic value of written works. The research explores matters of pricing, copyright law, file-sharing, ownership and lending models, as well as views on Canadian content, and assessments of knowledge and valuation of self-published books and traditionally published books. This report presents a summary of findings.

## 1.1 STUDY BACKGROUND AND OBJECTIVES

The goal of this research is to understand the value – social, cultural, economic – that English-speaking Canadians place on books. This research will be used to provide direction to the book industry in its efforts to better engage key influencers and to increase the sustainability and competitiveness of Canadian publishers and writers. This research may be used to inform:

- ongoing public conversation with creators, producers, readers, educators, etc.;
- development of new business models that more accurately reflect demand;
- public awareness campaigns;
- redirection of resources to formats or distribution systems that better serve changing tastes and public interest; and,
- additional research on specific issues emerging from this process.

## 1.2 METHODOLOGY

The study comprised five individual components as follows:

- A nationally representative survey of 1,568 Canadians 18 years of age and older. The sample source for this study was members of the EKOS *Probit* panel, which offers complete coverage of the Canadian population (i.e., Internet, phone, cell phone), assembled through random recruitment and equal probability sampling. The objective of the initial survey is to gauge broad attitudes, knowledge, and perceptions regarding books and the book publishing industry.
- A series of four focus groups with members of the general public on reading habits, the value and role of reading books in their lives and the lives of Canadians in general. The discussions also touched on some of the same topics from the survey (e.g., library usage, unauthorized

digital downloading, role of publishers). Focus groups took place in Calgary, Winnipeg, Ottawa and Halifax.

- A series of four focus groups with post-secondary students on the requirements for books used in their classes, along with associated costs, the perception of the quality of books used in education, use and value of using Canadian books in the classroom, unauthorized copying/downloading, and role of publishers. Focus groups took place in Calgary, Winnipeg, Ottawa and Halifax.
- Key informant interviews were conducted in the education sector to ascertain how the that sector perceives and values books, with a particular focus on issues of copyright and interpretation of fair use, as well a consideration of how purchasers and end users value Canadian versus foreign authorship. Interviews were completed with 18 interview respondents, with at least 2 from each of library and information science professionals, post-secondary students' associations, administrators of post-secondary institutions, primary and secondary institutions, as well as copyright specialists, and post-secondary publishers.
- A second, nationally representative survey of 1,590 Canadians 18 years of age and older. The *Probit* panel was also used, drawing a new, independent sample for the second survey. The second survey further explored relative value of books compared with other leisure activities, Canadians' reading of Canadian books for leisure and in the classroom, as well as the perceived value of such activity. The role of publishers and marketing strategies were also explored.

## 1.3 NOTE TO READERS

In addition to this summary report, there are four other reports related to this study. Three technical reports are also available, providing the full detailed results from the different lines of evidence. A fuller description of the methodology for each component can also be found in the reports. A fourth report contains appendix material of the data-collection instruments used to obtain results. Two technical reports present findings on issues related to discretionary reading. The first explores in detail patterns of reading, purchasing and borrowing books, and examines the role that reading has in our society and in people's lives personally. The role and value placed on Canadian books is also explored in the first of these two reports. In the second, patterns of where readers obtain information and look for books are presented. An examination of illegal downloading, as well as perceptions of the publishing industry are also featured.

The third technical report focused on the education side of the industry, exploring how books are used in education, and by post-secondary students specifically, as well as the role and value of Canadian books in the classroom.

## 2. FINDINGS

### 2.1 DISCRETIONARY READING

#### a) Consumption Patterns

- Most Canadians (8 in 10) read books, averaging over five hours per week in reading. Results from various sources including a 1978 Statistics Canada report<sup>1</sup> suggest that the proportion of Canadians who are reading has been increasing over the last 35 years. Reading books cuts across all demographic and geographic segments of the country. One in four read for work or school, and all but 10 per cent read for leisure, favouring fiction over non-fiction in a ratio of almost two to one.
- Reading is a key element of Canadians' leisure time, occupying about a quarter of all leisure time. Heavy book readers spend a lot of time reading other types of materials. They are among those who spend the most time reading newspapers and websites/blogs.
- The average amount of reported time spent reading books for leisure, work or school is just under six hours per week, potentially rising to seven in the summer months. About a third of Canadians say that 75 per cent or more of their reading time is spent reading fiction. Only one in ten say they read no fiction at all. The overall average proportion of reading devoted to fiction is 59 per cent.
- For about half of Canadians, reading occupies about the same amount of time as it has in the past, although an equal but balanced proportion have experienced an increase or decrease in the amount they read, or the amount they read for work or school specifically.
- About half of readers read e-books, with higher concentrations among younger readers although more than four in ten of even the oldest cohort read some books digitally. E-reading typically relies on a multifunction tablet or e-reader, although just over one in three use a computer or laptop. Fewer use a smaller mobile device such as a smartphone although this is still the case for almost one in four.
- E-books are most notably valued for being easier to travel with and not posing any technological barriers. However, focus groups indicated a strong preference by some for the experience of reading a physical book.
- Focus groups indicated that Canadians read Canadian authors across genres like history, politics, and science fiction, and feel there are many good Canadian books to choose from;

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<sup>1</sup> Statistics Canada. *Survey of Leisure Time Activities*. 1978. (through odesi online)

however, few deliberately try to read Canadian books, preferring instead to read “good books” that might happen to be Canadian. A few felt that there is a lack of diversity in Canadian literature and that they would read more Canadian books if there was more diversity of perspectives and segments of society represented.

- Over three in four Canadians (77 per cent) purchase books on an annual basis with an average annual expenditure of \$313. Across all Canadians, including those who do not spend, the average expenditure is \$253 on an annual basis. This is compared with 82 per cent who spend on screened-based activities including watching shows, videos or movies, as well as gaming; spending three times the amount that they do on books (\$933) in an average month. Across all Canadians this represents \$765 annually.

## b) Value of Reading

- Canadians, and readers in particular, are convinced of the value of reading, seeing the strong social benefits to individual Canadian adults and children (e.g., literacy and creativity), but also to society in general in terms of quality of life, social cohesion and strength of the economy. Focus groups confirmed that they see the impact of reading books on Canadian society as “huge”. People see books as a way to learn, to open one’s mind and imagination, and to connect with others.
- Most say they read for enjoyment or relaxation and escape, although one in three say they read for education and information gathering.
- Book readers have a strong appreciation for the value of this activity in their quality of life, with three in four saying it makes a solid-to-strong contribution. Comparatively, only half of those pursuing screen-based activities rate its contribution in the same way. Given the stronger appreciation for the contribution of reading books on quality of life, coupled with the three-times greater expenditure required to watch movies, shows or videos, and access/purchase games, it is not surprising that Canadians have a strong appreciation for the value for money that they get from books. Results showed that almost four times more people say that books represent a much greater value for money than screen-based activities, than those who believe screen-based activities have better value for their dollar.

## c) Book Purchasing

- Canadians own most of the books they read, mainly because they want the option to re-read their books or because they like to collect them.
- Canadians usually choose to read a book because they are familiar with the author, are interested in the topic, or because of recommendations from others, usually from friends and family.

- Physical book stores and online book sellers are the most important places for learning about books to read and are the places where most Canadians buy their books. Focus group participants confirmed that browsing bookstores brings a sense of pleasure.
- E-book readers typically purchase books from the major online retailers, but are open to the idea of accessing e-books through online renting/borrowing and through sites where content is made available through paid advertising.
- In terms of the value of reading as a leisure activity in comparison to other pastimes or forms of entertainment, focus group participants mentioned that book reading is a good value for money and creates an experience that has a lasting impact.

#### d) Use of Libraries

- Six in ten Canadians have used a library in the past 12 months, most often for pleasure reading rather than for school/work, and most often to access print copies of books. Reasons for not using a library, as put forward by focus group participants, have largely to do with the convenience of buying books and a desire to own rather than borrow.
- One in five is accessing digital books through libraries, although most borrow printed materials. Most borrowers say that they would be likely to, at some point, access an e-book through a library rather than purchasing it.
- Canadians see libraries as mainly having the benefit of allowing individuals to access (and discover) a great variety of reading material. Over half, for example, have learned about an author at the library and then purchased the author's book(s) as a result.
- They also see a wide variety of socio-cultural benefits to the community including increasing creativity and literacy, as well as overall quality of life to residents, and offering a vibrant meeting space in the community.

#### e) Appreciation for Canadian Books for Discretionary Reading

- The case for Canadian books in the context of commercial reading is less obvious to many Canadians than it is in the education context, according to survey results. Learning about Canada through Canadian voices and perspectives holds some resonance but most people feel that 'reading Canadian' is not really all that important. Nor are most people convinced that an education campaign is required to address what some perceive to be a non-existent 'problem'. Some responses suggested that most people don't pay much attention to whether or not authors they read are Canadian or not, and knowing that the author or publisher is Canadian is not important enough to sway their decision about which books to read. Certainly,

some respondents indicated that they read Canadian books, but not at the expense of quality (i.e., I won't read it just because it's Canadian).

- That said, respondents did find arguments about the need to support Canadian authors and the Canadian book industry compelling, understanding that what is not exercised atrophies. They also see prizes as a good way of highlighting the value and quality of Canadian writing. Further, survey results do not suggest that Canadians have any sense of inferiority when it comes to the quality of Canadian books, typically seeing them as at least on par, if not a little better in quality than other books.
- In the case of a campaign designed to elevate public awareness of Canadian books and their value, respondents suggested messaging aimed at the broadest audience, with some additional efforts targeting youth and schools, where young people can be exposed to Canadian books early on. Canadian authors, book publishers and retailers are seen as equally viable voices and perspectives from which to send the message.

## f) Book Publishers

- Most Canadians understand that book publishers play a role in printing, manufacturing, and producing books, but other roles are much less widely known. Focus group participants were also aware that publishers are involved in editing, developing content, and promoting books and authors, but were not confident that they knew all of the activities of publishers and to what degree they perform which tasks.
- Canadians who typically read books are more aware of many roles of publishers, including: selecting the best books for publication, shaping and editing manuscripts, advertising, promoting and selling books, designing the cover art and layout of each book, making books accessible to the public, and improving the quality of books.
- In focus groups, participants welcomed knowing more about what publishers do, how they fit into the book creation process, and what the level of effort is that publishers put into a book relative to authors and others involved.
- Many Canadians know that self-publishing is a route that authors can take to get their book published. Those who are aware of self-publishing think that not using a publisher impacts the author's ability to promote the book and the packaging of the book. However, Canadians are less likely to say that self-publishing may have impacts on other aspects such as the quality of the writing and accuracy of the content, and only a minority would have reservations about the accuracy and quality of a self-published book's content.
- Focus group participants indicated some preconceptions about the quality of self-published books, but weighed this with what they perceive as advantages of self-published books: a way for authors of niche genres and topics to get their work published, and for authors to hold on to more of the revenue from their sales.

- Publishers are seen by the general public as having a strong advantage over self-publishing in terms of the promotion and distribution of books.
- Focus group participants perceive publishers as taking the largest share of a book's sale (estimated at 40% to 60%), and feel this is not fair in comparison to the share of authors, which they feel to be too low (estimated at 5% to 25%).
- Most Canadians understand that book publishers play a role in printing, manufacturing, and producing books, as well as generally making books accessible to the public. Other roles, however, are less widely known.
- Survey results suggest that Canadians see the need for publishers to play strong roles in elevating the quality of books, finding and supporting new authors, and increasing the diversity of available books, as well as ultimately ensuring the health of the Canadian book industry. While it is not expected that the Canadian public would be in a position to know what publishers do on these fronts, it is noteworthy that at least some Canadians perceive that publishers contribute relatively little on these issues. This suggests that any public campaign designed to raise public awareness and appreciation for Canadian books might also take the opportunity to highlight the role and efforts of publishers on a number of fronts.

## g) Unauthorized Downloading

- Though more than one in three Canadians has accessed a free e-book, few (six per cent) have had unauthorized access to an e-book they otherwise would have had to pay for. In focus groups, only a small number had knowingly accessed an e-book for free without authorization; some were altogether unaware of this practice.
- The predominant concern that Canadians have about accessing free e-books relates to the quality of the content. They are more likely to be compelled to pay for a book if they know that there is a connection between their payment and authors getting paid for their work. Arguments about supporting the book industry and ensuring payment for publishers resonate less well. One-third would not consider the lost revenue to the author; two thirds would not consider the lost revenue to the publisher.
- Focus groups confirmed a strong sense of sympathy for the livelihood of authors and feel most compelled to think accessing free e-books is wrong because it deprives authors of income. That said, there was also some divergence in focus group discussions on whether sharing individual digital books, person to person, is as morally and legally wrong as unauthorized book access/sharing on a mass scale.
- By and large, Canadians are not particularly aware of or concerned with the problem of unauthorized downloading. Compared with the incidence of illegal downloading of other materials (e.g., music) the issue of books is just not on the public radar.

- Digital rights management is not a widely understood concept. Most who do understand the concept, however, are aware that it protects publishers and authors from piracy, but some feel DRM has negative implications for readers.
- In spite of the lack of awareness or concern for the issue, Canadians easily understand the implications of illegal downloading for authors, and the Canadian publishing industry. What is more, they also see the value in strong and clear messages telling the public that this is unacceptable behaviour, emphasizing the impact on the health of the industry, and need for authors and publishers to be paid for their work.
- There is some scepticism, however, about the extent of impact that a public campaign of this nature would have on the public at large (and ultimately on those who download illegally). Other research components have suggested that the greatest impact may be felt by aiming messaging at youth in particular.

## h) Marketing and Communications

- Although readers did not report a problem in finding Canadian books, they nonetheless appreciate the value in a symbol that would identify Canadian sources more easily. Since Canadians do not view Canadian sources as inferior to other sources, this type of symbol should not systematically relegate Canadian books to a second tier of choices among Canadian consumers. Other actions designed to increase the profile of Canadian books might include additional advertising and generally greater prominence of Canadian books in retail displays.
- Media advertising, advertising in retail space at point of sale and in social media were each put forward as viable opportunities for promoting Canadian books.
- The idea of digital warehouses for e-books (such as a Netflix model) has some traction on the commercial side among those who read digitally (i.e., four in ten showed some interest), but many said they prefer to own their own copies of books, and even prefer to have print copies of books. For those expressing an interest in such a service, the most attractive element is the access to a wide array of books, rather than the opportunity to reduce expenditure.

## 2.2 BOOKS FOR USE IN THE CLASSROOM

### a) Consumption Patterns

- Much of the academic work done by students remains heavily reliant on books in some form, with the amount of book reading dependent on the level of education and subject. In K-12, there is a strong focus on a consistent approach to the curriculum with teachers and library

staff largely responsible for the selection of books. In post-secondary education (PSE), the curriculum development is left largely to the course instructor.

- Most PSE students indicate that the overall cost of books for school is expensive, and most expensive for some students in their first year of studies. To mitigate costs, some PSE students buy used books, even if the text book is an older edition. Some students defer buying books until they understand how thoroughly the book will be used for the course.
- Interview respondents communicate that spending for books in the education sector has changed notably over time. Representatives of the publishing industry noted that revenue has decreased in the last two decades, most sharply in the last ten years. Those from K-12 institutions indicated that public spending on education has decreased, resulting in less funding available to purchase books. Some noted that the cost of PSE texts has increased, resulting in students purchasing fewer books but spending the same amount overall.
- PSE students in focus groups noted a strong preference for buying required books, rather than renting, sharing, or sourcing them for free, in order to ensure that they have convenient access to them when they need them. These PSE students described purchasing physical textbooks as an investment for adding to their personal library for later reference.
- Some sources of textbooks (e.g., campus bookstores) are perceived to be considerably more expensive and students try to make a point of finding alternative sources. Less expensive sources are typically sought wherever possible (e.g., available from some professors, ordering online from international sources).

## **b) Use of Canadian Books**

- PSE students described the usage of Canadian authored or published books in their studies; however, the extent to which they encounter Canadian books depends greatly on the course or subject. PSE students are appreciative of Canadian textbooks, particularly for Canadian-specific content (such law or health care) and where there is a need for relevant units of measure. For other fields, most students feel that as long as the textbook is applicable and relevant to their learning, it need not be Canadian.
- There are a range of perceptions regarding the relative cost of Canadian versus American versions of PSE textbooks. While some see them as less expensive, due to the volume of production, many see them as more expensive. For a few a higher cost is justified if the product is truly Canadian, however, most balk at a Canadian reprint of an American book sold at a higher cost.
- Most K-12 interview respondents felt that consideration should be given to books from Canadian authors to foster Canadian identity. A few interview respondents espoused the view that there is not enough Canadian content in K-12, arguing that the publishing industry could

launch an initiative at developing more curriculum-based Canadian content to influence the next generation of readers.

### c) Digital Books

- Most interview respondents agreed that a clear change in the last five years has been the emergence of digital books and material for educational use. Likewise, library representatives from both K-12 and PSE noted that institutions are centrally purchasing digital books and licenses from a variety of publishers. PSE students note at least some assigned reading is digital, although much is still hard copy. Most PSE students are reading at least some digital books, however, many say they prefer a physical book for educational use over digital. Although digital was said to have advantages in terms of convenience and transportability, physical copies are still easier to use for making notes and studying. Use of digital versus hard copy depends in part on price, the availability of digital updates, and the ability to resell a digital copy, if desired.

### d) Value of Textbooks

- PSE students perceive that the price of academic books has been based on the industry having a captive audience and noted the large variance of prices in books (from \$40 to \$400).
- Most students agreed that the price of a book can be justified if it is valuable to the course or has helped to get a good grade in the course. Students also identified that if they were excited about a course, they were more tolerant of the cost of the text book.

### e) Value of Canadian Books

- Survey results indicate that Canadians see an obvious case to be made for the use of Canadian educational tools in teaching at both the K-12 and post-secondary levels, although the advantage in K-12 is perhaps even more compelling and obvious for some.
- Unlike unauthorized downloading, the argument for Canadian books in the education sector seems an immediately compelling one, translating to six in ten seeing a strong need for a campaign to ensure that the public is aware of the issue and its implications for the quality of education in Canada.
- Provincial governments are seen as the organizations most responsible for ensuring that students have access to Canadian educational books.
- In terms of messaging about the need for Canadian books, the most effective approaches would focus on using material that contains Canadian references, published in accordance

with Canadian standards and curricula, and with Canadian perspectives. Supporting Canadian authors and sustaining a healthy industry are of secondary importance.

- Interestingly, this is also best framed in a positive rather than negative context (i.e., describing the value of using Canadian rather than the disadvantage in using other frames of references and sources). Positive collaborations to achieve the end goal are also seen as effective. Respondents also volunteered that messages that highlight the benefit to Canadians from increased knowledge about Canada and ourselves as Canadians (i.e., identity, culture, history and values) are particularly powerful.
- Again, youth, parents and the school system are seen as the best target for messaging, and schools and teachers are seen as the best voice from which to communicate the message (i.e., teachers and schools).

## f) Library Usage

- Most PSE students in the focus groups use libraries for sourcing materials for research and essays. Some will try to access libraries for textbooks to save the cost of purchasing books but reported that few copies are typically available.

## g) Fair Dealing

- There was limited understanding of the term *fair dealing* among PSE students, although some had heard of the term or were vaguely aware of the concept. A few held the view that fair dealing provisions are too restrictive for students; a few mentioned that the limits are there for a good reason.
- Many interviewees indicated awareness of fair dealing, although a few did not recognize the term. Of those aware, many indicated that there is more specifically “disagreement” over the term. A few stated that legislation and Supreme Court decisions provide clarity for stakeholders.
- Some PSE students said they suspect or are aware that some sharing and copying happens for education, which would be considered illegal. Copying and sharing print and e-books are seen by many students as ethically and morally a “grey area” and justifiable in certain circumstances.
- Some PSE students said that it is okay to access material for free without authorization because they have little income, that sharing knowledge should be free, that it is not right to have to pay for an entire book when only a portion of the book is required reading, that updates should be free with the price of the initial purchase, and that they judge some books as not being worth the price charged.

- PSE students understand that accessing books for free when they are meant to be paid for has an impact on the people who produced the book, and ultimately leads to higher prices for books. Many expressed little sympathy, however, for the impact this has on book publishers. In fact, many PSE students in the focus groups expressed negative sentiments about education book publishers who are perceived to be gouging low income students with high prices simply because the books are required reading. Several participants argued that this motivates students to find other ways to get the books they need without paying what they perceive to be inflated rates. They also acknowledged that they are further perpetuating the “vicious cycle” of increasing prices, describing it as an “unsustainable model”.
- Interview respondents remarked that digital licensing arrangements can increase access for students while ensuring reasonable benefit for publishers: publishers know how much they are selling, the arrangements are easy for libraries to use, and students have greater access to material.

## h) Book Publishers

- PSE students admitted little knowledge of the role of publishers in the educational sector. Mostly, students see publishers of academic books as responsible for “bringing it all together”: choosing books to publish, commissioning authors to write a book, compiling sections and making choices about the flow and approach of the book, providing advances to authors, editing, and handling book design and layout. Some students pointed out that marketing textbooks is different from marketing consumer books because there is already a market for textbooks.
- Some PSE students knew of self-published books being assigned for courses. Some noted that self-published books may be less durable, but almost no one expressed concerns with other aspects of self-published books, such as the quality of writing, the quality and accuracy of the content, or the usability and relevance to their studies. Some students feel that professors who assign self-published textbooks are demonstrating empathy for students in terms of the reducing cost to students of education and books.

## i) Business Models

- A number of suggestions were provided to change the way that books are created, published and paid for; alternative business models that increase the benefit for authors and publishers along with consumers. These include:
  - ◇ Making chapters or portions of books available
  - ◇ Ensure a reasonable cost of textbooks
  - ◇ Develop a rental or subscription model

- ◇ Combine books with supplementary content
- ◇ Treat e-books as living documents
- ◇ Relax restrictions on e-books
- ◇ Provide updates to K-12 digital texts
- ◇ Promote a diverse publishing industry
- ◇ Offer better metadata on publications
- ◇ Allow for advertising in textbooks

## j) Marketing and Communications

- In terms of books in the education sector, respondents suggested that pricing to make Canadian books competitive, as well as possible guidelines in place regarding the use of Canadian sources, are key to increasing promotion of Canadian books in the classroom.
- Digital warehouses for schools and post-secondary students accessing education books was seen as considerably more attractive and useful, particularly for post-secondary students, and even more so among those who reported that they read for school.

## k) Communication Strategies

- In terms of mitigating unauthorized access to books, PSE students in the focus groups were sceptical that a public education campaign would change the behaviour of students. Some PSE students suggested strategies such as:
  - ◇ Educating students about copyright
  - ◇ Educating people on where the money from a purchase goes
  - ◇ Reaching students and readers when they are young
  - ◇ Explaining the role of publishers
  - ◇ Informing how behaviour affects consumers
  - ◇ Providing clearer information about meaning of copyright



# 3. KEY POINTS

## 3.1 DISCRETIONARY READING

- Canadians readily see the social benefit of reading and of libraries on Canadian society, understanding the value they contribute to literacy, social cohesion, innovation and general quality of life in communities (March survey).
- There is a strong culture of reading books in all segments of Canadian society, as well as a strong culture of ownership and valuing of books (March and October surveys).
  - ◇ Eight in 10 Canadians report reading roughly five to eight hours/week, representing about one-quarter of their overall leisure time.
  - ◇ Half read digital formats.
  - ◇ Reported spending is about \$300/year for themselves and others (\$250 on average across all Canadians, including those who do not spend on books).
- There is a deep appreciation for the value of reading books in one's personal life and the contribution it makes to quality of life and value for money.
  - ◇ Canadians read for a variety of reasons including relaxation/to unwind, escape, and to become informed (March survey).
  - ◇ Reading books is seen as having considerably greater value than the screen-based activities on which they spend almost twice as much time.
  - ◇ It is also seen as having much greater value for money, particularly given that Canadians spend three times as much on screen-based activities (October survey).
- Although the value and rationale for leisure reading is clear to consumers, the value and rationale for reading Canadian books is less clear and low in the consciousness of Canadians.
  - ◇ Focus group participants confirmed that Canadians select books based on authors, topic and quality, more so than on country of origin, and most are not aware of where the books they read are written or published.
  - ◇ Some even express the view that they will not decide not read some books simply because they are Canadian (October survey and general public focus groups).

- In general, however, consumers do not see Canadian books as inferior in quality to those produced elsewhere, although they may be marginally likely to see Canadian books as slightly more expensive (October survey).
- While Canadians are not prone to noticing where the books they read come from, nor are they willing to read or purchase books simply because they are Canadian, they clearly understand and are receptive to messages highlighting the need to support the Canadian book industry in order to maintain a healthy Canadian sector (All components).
  - ◊ They are particularly sympathetic to the needs of Canadian authors (All components).
- To this end, Canadians believe that a Canadian symbol and awards/prizes as good ways of elevating Canadian books in the public consciousness, particularly at the point of sale, as well as through media/social media platforms (October survey).
  - ◊ Libraries are also seen as having broader value in the community to meet and discover, including finding out about new (Canadian) authors (March survey, general-public focus groups)
- Broad targeting of the public is seen as the best approach to communicate about Canadian authors and books, as well as specific targeting of youth, especially through schools. The voices of authors, publishers and retail are seen as valuable tools through which to communicate the message (March survey).
- Support of the book industry and publishers sits near the bottom of the priority list from the perspective of Canadians when it comes to paying for books. The role of publishers in enriching the final product of the book, and the variety of books that are generally available to the public, are not immediately obvious (i.e., top of mind), in part because many do not understand the role of publishers and the degree of involvement they have in the creation and distribution of a book. Canadians feel they better understand the role of authors and their value to the broader industry.
- Most Canadians do not recognize illegal downloading as a growing problem. They do recognize the obvious repercussions of this and are very supportive of messaging efforts designed to raise public awareness of the ramifications on Canadian authors and publishers (October survey).
  - ◊ Youth are seen as the best target for this type of campaign.
- While some interest was expressed among consumers for digital warehousing, Canadians seem more strongly attached to the tradition of owning physical books compared to other cultural products (e.g., movies). E-book readers typically purchase their books from several main sources; however, they are open to possible new models of borrowing e-books.

- ◇ Results suggest a small but eager market is interested in having access to a variety of books in digital format, and available for only short periods of time.

## 3.2 READING FOR EDUCATION

- Books are considered an important piece in education, from K-12 to PSE. Stagnant and even decreasing budgets for material in K-12 are contributing to declining revenues for book publishers. In PSE, the price of individual text books was noted to have increased considerably, encouraging students to purchase fewer books overall.
  - ◇ Budget and cost pressures result in alternative strategies such as sourcing material online, accessing through a library, or deferring the purchase of some books (Education sector interviews and PSE focus groups).
- The emergence of digital books and the popular adoption of mobile tools for accessing them (e.g., tablets and e-readers) have added to the material available for educational use, particularly in the last five years. Although more digital books are available, PSE students declare a preference for traditional print books for learning (Education sector interviews and PSE focus groups).
- Canadian text books are used and appreciated in instances where Canadian-specific content is useful for providing relevant examples or units of measure.
  - ◇ In other cases, most students feel that as long as the textbook is applicable and relevant to their learning, it need not be Canadian (Education sector interviews and PSE focus groups).
- From the perspective of the general public, while the case for Canadian books is not as obvious in the context of discretionary reading, most Canadians readily understand and agree with the value of Canadian sources in K-12 and PSE learning (October survey).
- Canadians see the arguments/messages for using Canadian books as obvious and compelling (i.e., using Canadian references and perspectives, published to Canadian curricula and standards) (October survey).
  - ◇ It is useful to note that many Canadians are not aware of the degree to which Canadian books are used in the classroom, possibly making this the easiest way to introduce messaging (i.e., “Did you know that...”)
- Positive examples of Canadian books used in the classroom, as well as productive collaboration between government, education and industry are seen as likely to have the greatest impact, aiming messaging at youth, parents and schools (October survey).

- ◇ Communication suggestions from the education sector and students largely involve efforts to provide greater information on the sector, to be more transparent and connect about how actions of those using or assigning the material affect the individual author or (to a lesser extent) publisher (Education sector interviews and PSE focus groups).
- Alternative business models suggested by students and the education sector include increased flexibility of material, such as making portions of books available (buying a chapter), providing updates to digital books, developing rental or subscriptions to e-books, and ensuring a reasonable cost of text books to avoid adverse actions (Education sector interviews and PSE focus groups). Similarly, while Canadians register some interest in digital warehouses on the commercial side, most Canadians see the value of this type of business model in the education sector (October survey).
- PSE students admitted little knowledge of role of publishers in the educational sector. Mostly, students see publishers of academic books as responsible for hiring authors and producing the books; little marketing is viewed as necessary for books in the education sector (PSE focus groups).
- There was limited understanding of the term *fair dealing* among PSE students; education stakeholders had greater awareness and opinion. Of those aware, many indicated that there is disagreement over the term among different parties; legislation and Supreme Court decisions are viewed as the authority on providing clarity (PSE focus groups).
- Communication suggestions largely involve efforts to provide greater information on the sector, to be more transparent and to clarify how actions affect the individual author or (to a lesser extent) publisher (PSE focus groups).

### 3.3 SUGGESTED PRELIMINARY STRATEGIC ACTIONS

Based on the research, we propose for consideration four major strategic actions to engage key influencers and to increase sustainability and competitiveness of Canadian publishers and writers:

#### a) Enhance dialogue

1. Socialize findings within the sector and among policy decision-makers:
  - Active dissemination of key findings to authors and publishers to equip them to lend their voices vis-à-vis policy makers.
    - ◇ Create dialogue opportunities within the sector for concerted future actions.

- Active dissemination of key findings to policy makers and public funders.
  - ◇ Create dialogue opportunities on the policy level with respect to copyright. Authors and publishers should engage through all possible channels with creators of policy and its implementation in law and in practice at relevant levels of jurisdiction.
  - ◇ Identify opportunities for promotion of Canadian books in Canadian schools through engagement with faculties of education and teacher training, as well as ministries of education.

## b) Retail/Public

2. Develop a strong Canadian brand symbol for use by Canadian publishers/educational publishers.
  - Quality has to be embedded as a key characteristic, as people will not read a book simply because it is Canadian, but they wish to read high quality books on topics and in genres that are of interest to them.
    - ◇ Pre-requisite: Canadians see Canadian books as equivalent or superior quality to foreign books.
  - Make locating Canadian books/authors/publishers easier in the retail environment without relegating books into a Canadian section. (Only 4 in 10 find it easy today).
  - Develop an attendant communications-driven public awareness campaign to introduce the graphic symbol and what it tells readers about Canadian books. Work with publishers and retailers to implement the graphic symbol in printed books as well as e-books, at point of sale in retail, on websites and in social media presence.
    - ◇ Can make the case for a strong, healthy Canadian publishing sector to encourage adoption/implementation.
3. Create a Celebrating Canadian Achievement campaign to extend positive coverage resulting from the most prestigious national book awards (Giller, GGs) through a sustained communications effort. Consider how to engage Canadians as participants in this campaign through enabling mechanisms, e.g. People's Choice Awards based on online voting and short-listing.

## c) Education

4. Develop a public awareness campaign to promote/highlight use of Canadian material in K-12 schools and post-secondary education institutions with a focus on positive approaches.

- Readiness is higher in education than retail for a broad public awareness campaign.
- Such a public campaign can be expected to create a halo effect, raising awareness of Canadian books in general.
- Can address hot button issues in context, e.g. cost of books; illegal downloading.
  - ◇ Take the opportunity to connect students with the face of Canadian publishers.
  - ◇ Distribute information videos clarifying copyright laws, what is an offence / what is not.
- Specific added targeting of teachers, parents and curriculum consultants and purchasers of materials.

#### **d) Further research**

- Quantify the estimated loss of revenue to Canadian publishers from illegal downloading within education system as well as illegal file sharing among general population.
  - ◇ Use this to undertake advocacy work and to feed into a public awareness and behaviour change campaign.
- Feasibility study for a publisher-owned digital warehouse of e-books in both education and retail sectors.