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

REPORT ON MARKETING, LIBRARY USAGE, ILLEGAL DOWNLOADING AND PUBLISHING

Submitted to:

The Book Strategy Group
Attention: Carolyn Wood
Executive Director
Association of Canadian Publishers

EKOS RESEARCH ASSOCIATES INC.
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ACKNOWLEDGEMENTS

Study Products:
This Marketing, Library usage, Illegal downloading and Publishing Report is one of five documents produced for this study. The other four documents include reports on:

- ◇ Appendix Material: Consultation Instruments
- ◇ Usage and Value
- ◇ Public Opinion on the Value of Books in the Education Book Sector
- ◇ Summary Report

1. INTRODUCTION

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 the findings from one component of this study: a public opinion survey with English-speaking Canadians.

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.

Two surveys were conducted with the Canadian public as part of this inquiry. The objective of each survey was to gauge broad attitudes, knowledge, and perceptions regarding books and the book publishing industry. A series of focus groups was used to further explore major issues.

1.2 SURVEY METHODOLOGY

The methodology for this study involved two nationally representative surveys of 1,568 and 1,590 Canadians 18 years of age and older. In order to keeps costs at a reasonable level, while ensuring adequate coverage of the target population for a probability-based survey (i.e., at least 90 per cent coverage), the methodology for this study involved an online/telephone hybrid approach for each survey.

In total, 85 per cent of each sample completed the interview as a self-administered form online. The remaining 15 per cent completed the survey over the telephone with a trained interviewer. Each sample was drawn from all provinces and territories, including Anglophones in Quebec, and subsequently

stratified to include a higher than representative portion in the smaller provinces of the country (Saskatchewan, Manitoba and the Atlantic Provinces). The sample source for each survey was members of the EKOS Prob*it* panel, which was specifically designed for online/telephone surveys. Our panel offers complete coverage of the Canadian population (i.e., Internet, phone, cell phone), random recruitment (in other words, participants are recruited randomly; they do not opt themselves into our panel), and equal probability sampling. All respondents to our panel are recruited by telephone using random digit dialling and are confirmed by live interviewers. The distribution of the recruitment process for our panel mirrors the actual population in Canada (as defined by Statistics Canada). As such, our panel can be considered representative of the overall Canadian general public. Each sample size yields a level of precision of +/- 2.5 per cent, 19 times out of 20, for the sample overall and +/- 7 to 11 per cent for most sub-groups that could be isolated in the analysis (including age and gender segments, etc.).

Each survey took an average of 18 to 19 minutes to administer on the telephone, by a pool of bilingual trained interviewers. EKOS Research was responsible for questionnaire development, programming, translation and testing of each questionnaire.

Each survey was monitored for sample efficiency (e.g., rotation and number of call-backs) and gender quotas, as well as for general data quality. Each survey was collected over roughly two weeks; with the first one collected in March 2014 and the second in October 2014. Each number entered into each initial sample was attempted up to eight times before retiring the telephone number, and attempts were spread over the data collection period. The response rate for the first telephone survey was 28 per cent, while the response to the second survey was at a rate of 18 per cent, in part because of collection over Thanksgiving.

1.3 SAMPLE CHARACTERISTICS

The following sections provide details on the distribution of the sample in terms of demographics, geography, and Internet use.

a) Demographics

The sample is largely reflective of the distribution of men and women in the Canadian population. Four in ten in the sample (41 to 42 per cent) are 55 or older, which is higher than the Canadian population according to 2011 census data. One in five (18 to 19 per cent) is between 18 and 34 years old. There is a significant under representation of youth under 25. Survey results were weighted by age and gender to reflect the population for the analysis.

Table 1.1: Gender and age distribution

	March Survey (n=1568)	October Survey (n=1590)
Gender		
Men	53%	49%
Women	47%	51%
Age		
18-34	19%	18%
35-44	35%	38%
55+	42%	41%
No response	4%	4%

Just over one in four in the samples (28 to 29 per cent) have household incomes under $60,000. Just under one in four (23 to 24 per cent) have incomes between $60,000 and $100,000. Three in ten (29 to 31 per cent) have a household income greater than 100,000. The majority have some post-secondary education, including just under four in ten who have a college education or equivalent, and a slightly higher proportion (36 to 40 per cent) who have a bachelor's degree or higher. About one in four in the samples (23 to 26 per cent) has at most a high school education.

Table 1.2: Income and educational distribution of sample

	March Survey (n=1568)	October Survey (n=1590)
Income		
Under $20,000	5%	6%
$20,000 to just under $40,000	9%	10%
$40,000 to just under $60,000	14%	13%
$60,000 to just under $80,000	11%	12%
$80,000 to just under $100,000	12%	12%
$100,000 to just under $120,000	11%	9%
$120,000 to just under $150,000	7%	7%
$150,000 and above	12%	12%
No response	18%	17%
Education		
Some high school or less	3%	2%
High School diploma or equivalent	23%	21%
Registered Apprenticeship or other trades certificate or diploma	4%	5%
College, CEGEP or other non-university certificate or diploma	27%	26%
University certificate or diploma below bachelor's level	7%	6%
Bachelor's degree	25%	26%
Post graduate degree above bachelor's level	12%	14%
No response	2%	1%

Nine in ten people in the March sample (89 per cent) learned English as their first language. Five per cent report their mother tongue to be French, although they currently speak both English and French, and a slightly larger proportion learned a language other than English or French as their first

language (nine per cent)[1]. Thirteen per cent of the sample is foreign-born, which is lower than is found in the Canadian population according to 2011 census data (20.6 per cent).

Table 1.3: First language and birthplace

	March Survey (n=1568)	October Survey (n=1590)
First language		
English as first language	89%	NA
French as first language	5%	NA
Other first language	9%	NA
No response	1%	NA
Born in Canada		
Yes	87%	86%
No	13%	13%

Roughly one in three in each of the samples (29 to 34 per cent) has a child or children under 18 living in their home.

Table 1.4: Proportion of sample with children under 18 living at home

	March Survey (n=1568)	October Survey (n=1590)
Children under 18 living at home		
Yes	29%	34%
No	70%	66%
No response	1%	1%

b)   Geographic Distribution

Following is the sample distribution by province/territory, which was stratified to increase the proportion of cases in the smaller provinces (e.g., in the Prairies and Atlantic Canada), reducing the sample in Ontario. There are also relatively few cases in Quebec as the survey sample was designed to reflect the English-speaking/reading public. Results were subsequently weighted to reflect the geographic distribution of the actual population of Canadians who speak English at home in the analysis of the results.

Table 1.5: Provincial/territorial distribution of sample

	March Survey (n=1568)	October Survey (n=1590)

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[1] This indicator of language was not included in the October survey.

Province/Territory		
BC	19%	15%
Alberta	19%	13%
Saskatchewan and Manitoba	18%	14%
Ontario	23%	31%
Quebec	6%	9%
Atlantic Provinces	15%	15%
Territories	1%	1%

More than one in three Canadians sampled (37 per cent) live in the largest cities[2]. A slightly higher proportion (49 per cent) lives in smaller urban centres. The remainder in the sample (14 per cent) lives in rural areas.

Table 1.6: Urban/Rural distribution of sample

	March Survey (n=1568)	October Survey (n=1590)
Urban/Rural Distribution		
Large urban centres	37%	37%
Smaller urban centres	49%	49%
Rural	14%	14%

[2] The cities with the largest populations in Canada (i.e., over 750,000 in their Census Metropolitan Area) are Toronto, Montreal, Vancouver, Ottawa, Calgary, Edmonton, Winnipeg, Hamilton, and Quebec City.

c)   Internet and Social Media Use

Most Canadians in the March sample (87 per cent) access the Internet multiple times a day. Almost all (97 per cent) use a desktop or laptop computer. In addition, half (53 per cent) access the Internet using a smart phone and just under half use a tablet device (47 per cent). All use the Internet primarily for personal use. Additionally, over half (57 per cent) usually use the Internet for work while another 10 per cent use the Internet for school.

Table 1.7: Frequency of Internet use, devices used, and reason for use

How frequently do you access the internet? (n=1368)	
Multiple times a day	87%
About once a day	9%
Several times a week	3%
What kinds of devices do you use to access the Internet for personal use? (n=1368)	
Desktop computer or laptop	97%
Mobile phone with basic Internet access	8%
Smart phone capable of accessing data, video, etc (e.g., iPhone, Blackberry)	53%
Tablet device (e.g., iPad, Amazon Kindle)	47%
Home gaming system (e.g., Sony PlayStation, Microsoft Xbox, Wii)	12%
Usually use the internet for… (n=1368)	
Work	57%
School	10%
Personal use	99%

More than half of respondents in the March sample use social media on a frequent basis, including those who use social media at least once a day (16 per cent) or multiple times a day (37 per cent). One-quarter of respondents are infrequent social media users, who may access social media sites several times a week or less often. Eighteen per cent in the sample never use social media. Almost everyone who uses social media is on Facebook (90 per cent). Four in ten (42 per cent) use LinkedIn and one in three (34 per cent) use Twitter.

Table 1.8: Frequency of social media use and sites used

How frequently do you use social media? (n=1368)	
Multiple times a day	37%
About once a day	16%
Several times a week	10%
Once a week	5%
Several times a month	4%
Once a month	2%
Less than once a month	6%
Never	19%
Don't know/No response	1%

Which of the following do you use, if any? (n=1002)	
Facebook	90%
Linkedin	42%
Twitter	34%
Pinterest	21%
Tumblr	5%
Other	6%

2. FINDINGS

2.1 PROFILE OF READERS

As measured in the first survey conducted under this research, four in five Canadians (80 per cent) read books on a regular basis (i.e., in the last 60 days). The incidence is higher among women than it is among men, as well as among younger Canadians. It is marginally lower in Atlantic Canada, but otherwise fairly even across different segments of the sample.

The average number of hours spent reading over a two-month period is 7.8, although again, this is higher among women. The average number of hours spent reading is also higher among those with less income, likely elevated because it encompasses retirees. Reading intensity is similarly higher among those who do not have children at home. Reading intensity is lower in the Prairies than elsewhere in Canada.

Reading for work is more common among men and is noticeably less common among those over 55 (including the retired, which likely explains the difference in the age cohort). It increases with household income. The incidence is lower in Quebec. Reading for school is of course higher among those under 35 and is higher in households reporting the highest income, likely influenced by students living at home.

Table 2.1: Incidence, intensity and purpose for reading

	Read (%)	Weekly Hours of Reading (Mean)	Leisure (%)	Work (%)	School (%)
Total	**80%**	**7.8**	**94%**	**41%**	**15%**
Gender					
Male	76%	6.4	92%	48%	16%
Female	85%	9.0	96%	23%	14%
Age					
<35	84%	7.3	89%	49%	40%
35-54	78%	7.7	95%	48%	8%
55+	81%	8.4	98%	26%	1%
Income					
<$40,000	77%	10.3	92%	32%	20%
$40,000-$80,000	80%	8.0	93%	36%	19%
$80,000-$120,000	79%	6.2	96%	45%	58%
$120,000+	81%	6.2	94%	58%	13%

	Read (%)	Weekly Hours of Reading (Mean)	Leisure (%)	Work (%)	School (%)
Parents					
Yes	83%	6.8	94%	46%	16%
No	79%	8.1	94%	38%	14%
Region					
BC-Territories	83%	8.0	94%	40%	19%
Alberta	78%	6.7	93%	46%	9%
Sask/Man	78%	6.6	90%	43%	14%
Ontario	83%	8.2	95%	40%	17%
Quebec	79%	7.7	96%	33%	9%
Atlantic	72%	8.2	96%	39%	10%

Roughly half of respondents (49 per cent) read in digital format, which was also the proportion measured in the first survey. This is lower among those 55 years of age or older, although 44 per cent still read in digital format in this age cohort. Those who read for work and school are considerably more likely to read in digital format (66 and 69 per cent, respectively). Those who read more hours per week are also more apt to read e-books than those who read a limited number of hours on a weekly basis. These same patterns were found in the first survey.

2.2 READING DECISIONS AND LEARNING ABOUT BOOKS

The decision to read a particular book is based largely on three factors: familiarity with an author and liking other books by a particular writer (81 per cent); topic of the book (78 per cent); and the recommendation of others (68 per cent). The quality of the writing is a fourth but less popular driver in the decision, selected by 50 per cent of respondents who read. Other factors that can help a person decide what book to read include online reviews (39 per cent), reading an excerpt of the book (33 per cent), easy access (27 per cent), and the book cover (28 per cent). Factors that matter to fewer than one in four when deciding whether or not to read a book are the requirement to read it (e.g., for school, work, book club – 22 per cent), an accessible price (20 per cent), and the publisher (eight per cent).

In 1991, *Reading in Canada* found that the topic of the book was a key factor in the decision to read a book (65 per cent), whereas the author was relatively less important (35 per cent). Recommendation was also the third most popular factor in 1991 (22 per cent).

Basis for Reading Decisions

"How do you judge whether you want to read a book?"

Reason	Percentage
Like the author/read other books by the author	81%
Like the topic	78%
The book is recommended by people I know	68%
Like the quality of writing	50%
I read online reviews	39%
I read excerpts offered by book seller	33%
Attracted by the book cover	28%
Have easy access to the book	27%
The book is required reading for something	22%
The price of the book	20%
Like the publisher	8%
Other	5%
DK/NR	1%

EKOS Research Associates Inc.

n=1262

ACP Survey, 2014

> While author and topic are both primary reasons for selection of a book, women are somewhat more apt to make their decision based on the author, while men lean marginally toward judging based on the topic. Like women, seniors are somewhat more apt to judge by the author.

> Recommendations are also more often used by women than men to make the selection, which may translate to whether or not readers are library users or not. This pattern is also found among library users (who are more often women).

> Quality of the writing is also more often used to judge a book among those reporting the least household income (under $40,000).

> Online reviews are more often the basis for selection among library users compared with those who do not use libraries. They are also more apt to be a source for judging a book among those living in major urban areas, individuals who read for school or work and those who read e-books.

> Those who select their books on the basis of having easy access to them are more often younger (under 35), less affluent (with household incomes under $40,000), digital readers and those who use libraries.

> Reading excerpts from books is more often cited as a method for choosing among women, compared with men, as well as by readers of e-books and library users.
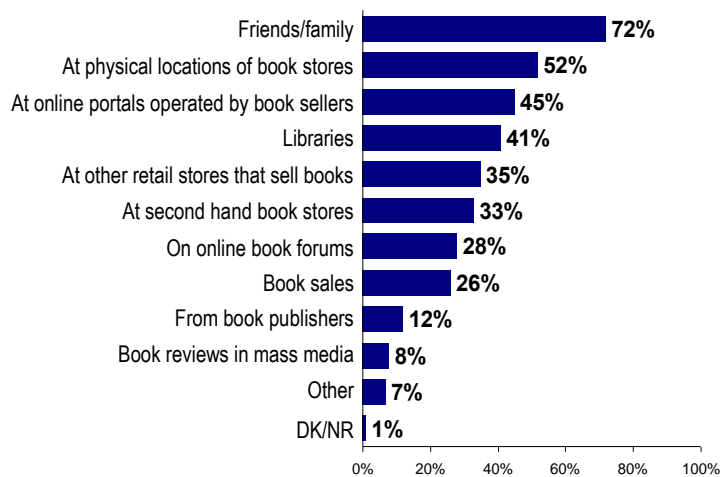
> Those more often attracted by the book cover are women (compared with men), those under 35 and readers with the least household income.

Most participants make their reading decisions based largely on recommendations from personal connections such as friends and family, along with recommendations from other sources such as online reviews (including Amazon.com search recommendations), bookstores (staff picks such as "Heather's Picks"), libraries, and radio (such as *Canada Reads* and other CBC shows). Some choose new books primarily based on a favourite genre or authors.

Friends and family are the predominant source for Canadians finding out about books they want to read. Seven in ten Canadians (72 per cent) learn about books they want to read from friends and family. At a distant second and third, half of Canadians (52 per cent) find out about books they want to read from physical bookstores and 45 per cent go through the online websites of booksellers, which is greater than the proportion learning about books through other (general) retailers (35 per cent). Four in ten Canadians (41 per cent) learn about books from libraries. One in three (33 per cent) find them from second hand book stores, and one in four (26 per cent) from community or library book sales. Almost three in ten (28 per cent) find out about books through online forums like GoodReads, BookTalk, and other websites and blogs. One in ten Canadians finds out about books directly from publishers (12 per cent) and only eight per cent through book reviews.

Sources for Finding Books

"Where do you find out about books that you want to read?"

Source	Percentage
Friends/family	72%
At physical locations of book stores	52%
At online portals operated by book sellers	45%
Libraries	41%
At other retail stores that sell books	35%
At second hand book stores	33%
On online book forums	28%
Book sales	26%
From book publishers	12%
Book reviews in mass media	8%
Other	7%
DK/NR	1%

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n=1262   ACP Survey, 2014

> Women are more likely than men to find out about books from friends and family, as well as from community book sales and book reviews.

- Readers under 35 are more likely than older Canadians to use online book forums. Seniors are more apt than younger readers to visit second hand book stores and other non-specific retailers, as well as to rely on mass media book reviews (e.g., in the newspaper/on the radio).

- Income is associated with whether or not readers visit second hand book stores; these stores are most popular with those reporting household incomes of less than $40,000.

- Readers reporting a mother tongue other than English or French are more apt to rely on online book forums than Anglophones or English speaking Francophones.

- More intense readers (five hours or more per week) are most apt to get books from libraries. Those accessing online book sellers and book forums are more often reading digitally, and those who go to second hand book stores and physical book stores are more apt to also be magazine readers.

A 2012 Quorus study[3] for Canadian Heritage likewise explored the ways in which Canadians discover new books. The study found that "Word of mouth and browsing at large chain bookstores are the most popular ways Canadians discover books, followed by bestseller lists, awards and critical acclaim, and the library. Internet-related approaches have yet to supplant more traditional bricks-and-mortar outlets as a way to discover new books – roughly four in ten Canadians use book retailer websites often or sometimes to discover books compared to 60% for large chain bookstores."

a)   Purchasing Print Books

The majority of the population, 74 per cent, purchase their books at physical book stores, although online purchasing has become an important outlet with 60 per cent of readers using online portals operated by book sellers. Other retail stores such as department stores, drug stores, grocery stores also provide books to 40 per cent of the readers, which rivals community/library book sales, found in libraries and communities (36 per cent). Very few readers (eight per cent) purchase books directly from the publisher.

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[3] Quorus Consulting Group. *Canadian Books, Film, Periodicals and Music Opinion Survey. Executive Summary*. September 4, 2012. Online: http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/canadian_heritage/2012/090-11/summary.pdf

Sources for Purchasing Books

"Where do you purchase books you read?"

Source	Percentage
At physical locations of book stores	**74%**
At online portals operated by book sellers	**60%**
At other retail stores that sell books	**40%**
Book sales	**36%**
Directly from book publishers	**8%**
Other	**6%**
DK/NR	**2%**

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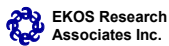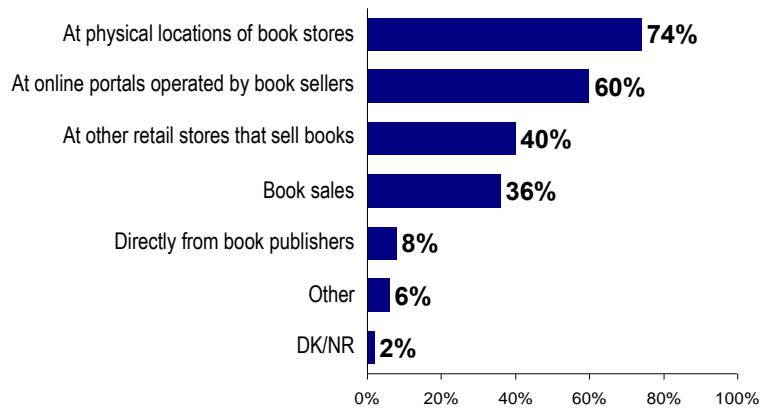
n=1262

ACP Survey, 2014

› Physical book stores are the main vendor for most segments of readers. They stand out as an even more popular choice among magazine readers and library users, relative to those who do not read magazines or use libraries.

› Online portals are also popular with most book buyers. In particular, 35 to 64 year old readers and the most affluent are even more likely to use online portals for purchasing books.

› General retailers are more frequently chosen as a place to purchase books among residents of Saskatchewan and Manitoba as well as Atlantic Canada, and in smaller urban centres. Women, seniors, residents of Saskatchewan and Manitoba as well as Atlantic Canada, magazine readers, library users, and those who read with moderate intensity on a weekly basis (i.e., 6 to 10 hours per week) are all more likely than their counterparts to go to community book sales for their books.

The process of book buying, and discovering a new book, is something focus group participants said they enjoy. Those who are genre- and author-driven go to book stores and search the relevant section for new material. Almost all enjoy destination book stores such as Chapters/Indigo and the "in-store experience", while a few prefer to support local, independent book stores, in order to shop locally and also to make the finding and purchasing of a book more of a "whole shopping experience". Several participants talked about the value of having good (i.e., accurate and compelling) descriptions of the book on the flap to help market the book and make the selection process easier for consumers.

2.3 MARKETING AND COMMUNICATIONS STRATEGIES

a) Sources for Campaign Messages

The three leading sources for information on books and the book industry are: online/websites (55 per cent); book stores (53 per cent); and traditional media where discussions are held about books (47 per cent). Of the two other options offered to respondents, just over one in three (36 per cent) indicated they get information from media advertising. The least used source of information amongst respondents was social media with just over one-quarter of respondents (28 per cent) selecting it as a source of information.

Media advertising was considered to be the most effective way to communicate to the public for a campaign to promote awareness of Canadian authors and publishers (64 per cent). Book stores (55 per cent) and social media (54 per cent) were clear second and third choices, while identification on books themselves (45 per cent) and book seller websites (41 per cent) were selected by fewer than half of respondents.

Sources for Campaign Messages

"Where do you get information about books and the book industry?"

Source	%
Online/websites	55%
Book stores	53%
Traditional media	47%
Media advertising	36%
Social media	28%
DK/NR	6%

0% 20% 40% 60% 80% 100%

n=1232

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(Those who read)

"Where would it be most effective to communicate to the public with a campaign that promotes awareness of Canadian authors and publishers?"

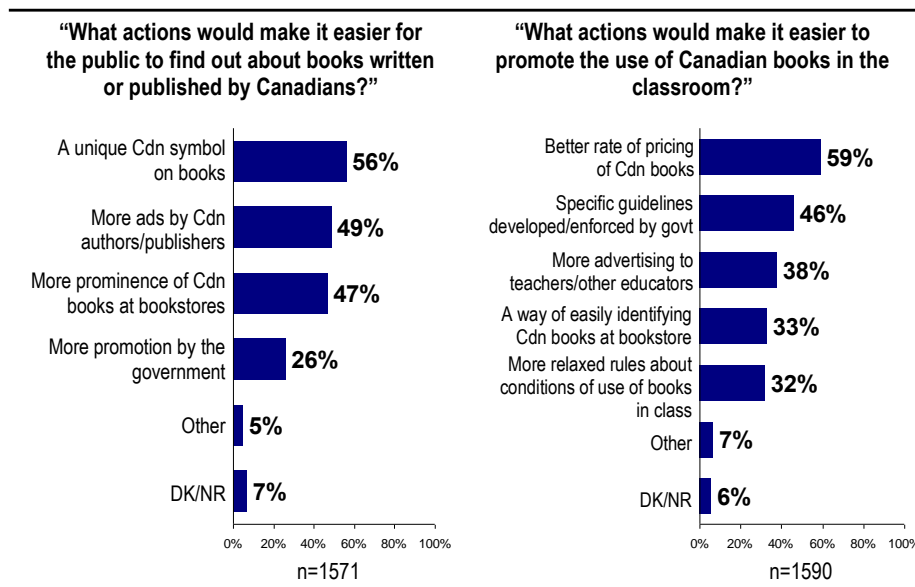| Source	%
In media advertising	64%
In book stores	55%
In social media	54%
On books themselves	45%
On book seller websites	41%
DK/NR	8%

0% 20% 40% 60% 80% 100%

n=1263

Book Strategy, Wave 2, 2014

> Women are more apt than men to receive their information from more traditional sources (book stores, traditional media, and media advertising), as are older Canadians (55 or older), more intense readers and spenders.

> Those who use online/websites as a source of information are more likely to be younger (under 35), affluent (household income over $120,000), read for work purposes, e-book readers, and those who spend more on books.

> Those who are more likely to use social media are typically younger (under 35), less affluent (under $40,000), read for school purposes, more intense readers of books (and therefore higher spenders for books), and are readers of e-book readers.

> Women are more likely than men to consider each of the means of communication as effective.

> Media advertising was considered effective more often by older Canadians (55+). Younger individuals (under 35) are more likely to see it as less effective.

> Book stores are more apt to be seen as effective among those who spend the most on books, but least apt to be seen as effective among those under 35.

> Those who selected a social media awareness campaign were more likely to be younger (under 35) and at the same time those who spend the most on books.

b)   Actions to Increase Awareness of Canadian Books

In terms of actions making it easier for the public to find out about books written or published by Canadians, three options are viewed with similar favour. A unique Canadian symbol on books was cited by over half (56 per cent) as a good method, followed by increased advertising by Canadian authors/publishers (49 per cent) and increased prominence of Canadian books at bookstores (47 per cent). One in four Canadians believes that increased promotion by the government (26 per cent) would make it easier for the public.

In terms of the education sector, better pricing for Canadian books was seen as the strongest option, according to six in ten (59 per cent). Specific guidelines developed and/or enforced by government were also cited as a good route by just under half of respondents (46 per cent). Increased advertising to teachers, an easy way to identify Canadian books, and more relaxed rules about conditions of use were each cited by about one in three as good methods of promoting the use of Canadian books in classrooms.

Actions to Increase Awareness

"What actions would make it easier for the public to find out about books written or published by Canadians?"

A unique Cdn symbol on books	56%
More ads by Cdn authors/publishers	49%
More prominence of Cdn books at bookstores	47%
More promotion by the government	26%
Other	5%
DK/NR	7%

n=1571

"What actions would make it easier to promote the use of Canadian books in the classroom?"

Better rate of pricing of Cdn books	59%
Specific guidelines developed/enforced by govt	46%
More advertising to teachers/other educators	38%
A way of easily identifying Cdn books at bookstore	33%
More relaxed rules about conditions of use of books in class	32%
Other	7%
DK/NR	6%

n=1590

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Book Strategy, Wave 2, 2014

- Women were more likely than men to believe a unique Canadian symbol would make it easier for the public.

- Those who believe more prominence of Canadian books at bookstores would make it easier for the public were more likely to be older (55 or over), and those who read and purchase books more intensely.

- Older Canadians (55+) were more likely to view more advertising as an effective action.

- Income was associated with more promotion by the government; this option was most popular with those reporting household incomes of less than $80,000 and it was less popular with households over $120,000.

c) Book Purchasing from Online Retailers

For Canadians who make book purchases online, the most prominent online seller is Amazon (72 per cent), followed by Chapters/Indigo (60 per cent). Other sources were not selected by a significant number of respondents.

Online Purchasing Sources

"Which online portal operated by book sellers do you purchase from?"

Amazon	72%
Chapters/Indigo	60%
Kobo (Sony)	6%
Apple, iTunes	2%
ABEBOOKS	2%
Other	9%
DK/NR	1%
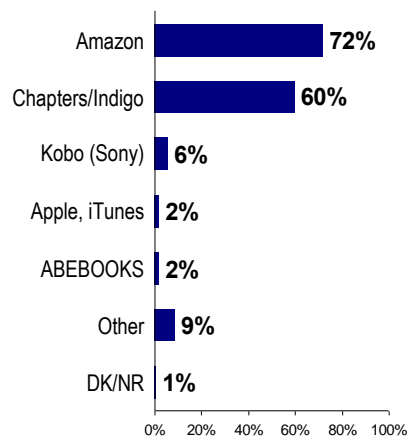
n=715

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"Aside from buying e-books from stores or obtaining them from a library, would you be willing to access e-books through?"

An online rental place you use for e-books	41%
Sites where content is paid for by advertising	37%
Subscription services	26%
None of these	23%
DK/NR	17%
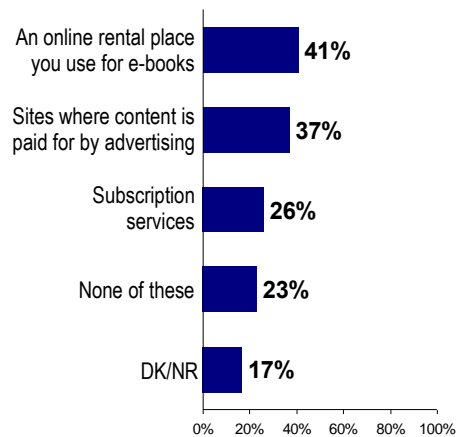
n=570

ACP Survey, 2014

- Canadians who purchase from Chapters/Indigo are more likely to be women, have children at home, and have incomes between $80,000 and $120,000. They are also more likely to be

Anglophones, light readers (one to five hours per week), library users, and live in large urban centers.

Readers of e-books were asked if they would be willing to access e-books through an online rental place they use for books, sites where content is paid for by the advertisers and/or subscription services. Roughly equal proportions (41 and 37 per cent) said that an online rental site for books and/or a site with content paid for through advertising would be acceptable. Fewer (26 per cent) said they would use subscription services. One in five (23 per cent) would not use any of these and 17 per cent are unsure.

> Notably, readers under the age of 35 would be considerably more willing to visit a site where the content is paid for by advertisers (46 per cent), which is also the case with residents of the largest cities and people with incomes between $40,000 and $80,000.

Many focus group participants indicated they have purchased books online at some point, primarily citing Amazon, Chapters, and Barnes and Noble as retailers. A few commend online booksellers for making books more affordable and accessible. Participants cited advantages of online shopping such as a good price, the ability to buy at any time and without standing in line, and the profile feature which recommends books in similar genres or styles. A few also noted the propensity to "binge shop" online, ordering several books at once and not always those they intended to buy before browsing online.

d)   Demand for E-Books Services

E-readers were asked about a possible e-books service, described as a digital delivery service to access e-books, using a model similar to Rogers on Demand or Netflix. Results suggest a strong demand, with four in ten saying they would be likely to use the service. Another one-third (31 per cent) expressed a moderate interest in the service. Three in ten (29 per cent) said they would be unlikely to use this type of model. Although seven in ten expressed at least moderate interest, it should be noted that this is at best a notional reflection of demand based on a non-existent service. Interest is highly likely to be considerably diminished if the service were in place and practical realities known about the pricing and other conditions of the service.

Demand for E-Book Services

"If a digital delivery service for e-books was available (like Rogers on Demand or Netflix), how likely would you be to use this service?"

(Those who read; half sample)

EKOS Research Associates Inc.   n=617   Book Strategy, Wave 2, 2014
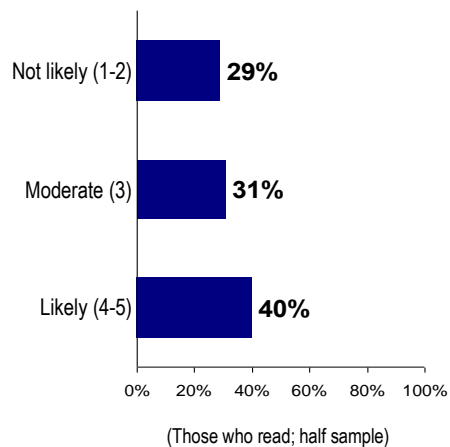
> Older Canadians (over age 55) are less apt than younger Canadians to have an interest in this type of e-books service.

> Demand is higher among those with higher household incomes ($120,000 or over), along with those who spend more on books, and parents.
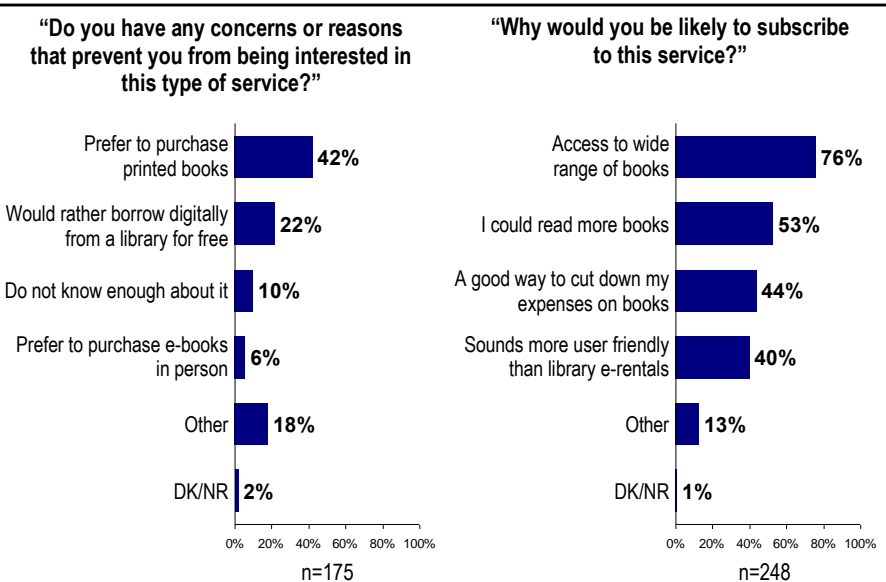
e) Reasons for Demand/ Lack of Demand

Among those with limited interest in the e-book service, 42 per cent explained that they prefer to purchase printed books. One in five (22 per cent) would not use the service because they would rather borrow e-books from a library for free. Ten per cent would like to learn more about the service before considering a subscription, while six per cent prefer to purchase e-books.

Three-quarters (76 per cent) of those interested in the e-book service cited the access to a wide range of books as the reason they would be likely to subscribe. Roughly half indicated that the service would allow them to read more books (53 per cent) or would be a good way to reduce expenses for books (44 per cent). Two in five (40 per cent) feel the service would be more user friendly than library e-rentals.

Reasons for Demand/Lack of Demand

"Do you have any concerns or reasons that prevent you from being interested in this type of service?"

Prefer to purchase printed books	42%
Would rather borrow digitally from a library for free	22%
Do not know enough about it	10%
Prefer to purchase e-books in person	6%
Other	18%
DK/NR	2%

n=175

"Why would you be likely to subscribe to this service?"

Access to wide range of books	76%
I could read more books	53%
A good way to cut down my expenses on books	44%
Sounds more user friendly than library e-rentals	40%
Other	13%
DK/NR	1%

n=248

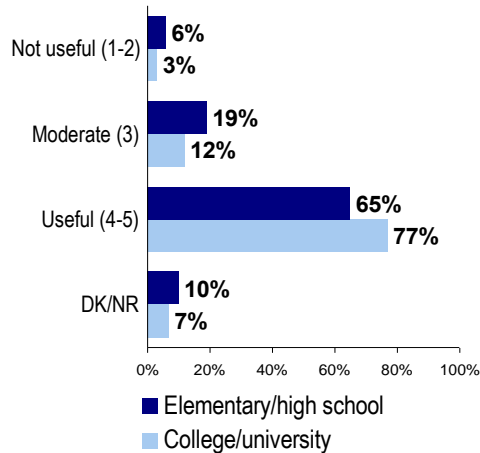**EKOS Research Associates Inc.**

Book Strategy, Wave 2, 2014

> Those who spend only limited amounts on books are more apt to prefer borrowing ebooks from a library than use the type of model described.

> On the other hand, lower income e-book users interested in this model are more likely to say that the subscription would be a good way to cut down expenses on books.

By contrast, the same type of subscription-based model is seen as particularly useful in the education sector. A full two in three respondents (65 per cent) see this as a useful model for K-12 schools, and three in four (77 per cent) said this model would be useful for post-secondary students.

Demand for E-Book Services for Education Sector

"If a digital warehouse for e-books was available for educational text books and material used in elementary and high school/college and university, how useful do you think this would be for public schools to subscribe to this service?"

	Elementary/high school	College/university
Not useful (1-2)	6%	3%
Moderate (3)	19%	12%
Useful (4-5)	65%	77%
DK/NR	10%	7%

EKOS Research Associates Inc.

n=1590

Book Strategy, Wave 2, 2014

› The most affluent readers (reporting household incomes of $120,000 or greater) as well as those who read for school and/work are even more likely than others to see the value in this type of service in the education sector, as are e-readers, and those who spend the most for books.

2.4 LIBRARY USE

Six in ten Canadians (58 per cent) say that in the past 12 months they have visited a public library or an online portal operated by a public library.

› Readers more likely to use libraries than their counterparts include more intense readers (reading six or more hours per week), those who read for work or education, people under the age of 35, allophones, and people with children under 18 at home. Women also have a somewhat higher propensity to visit a library compared with men. Ontarians are also more likely to have used a library.

Table 2.2: In the past 12 months, have you visited a public library or an online portal operated by a public library?

	%Yes

Overall	**58**
Gender	
Men	54
Women	62
Age	
<35	63
35-54	58
55+	53
Children living at home	
Yes	68
No	53
First Language	
English	58
French	46
Other	70

More than half of focus group participants had attended a library recently, with a few regular library users who access most or all of their reading material through the library. A few indicated that they use the library because it is conveniently located for them, to access reference materials, or to discover new books. Those who do not use a library indicated that they prefer to own their books, do not like to attend the library (the physical location or hours of operation) or worry about return dates, or are not deterred by the price of books.

A 2012 study for the Canadian Library Association[4] indicated that 41 per cent of Canadians are active public library cardholders and 20 per cent have a library card but have not used the library in the last three years, resulting in an estimate of 61 per cent of all Canadians with public library membership. The 2005 PCH study[5] reported that 40 per cent of Canadians have borrowed a book in the last 12 months. While a "visit" to a library does not equate to "borrowed a book", the 18 per cent difference in these two studies nearly ten years apart could be due to the greater incidence of online portals operated by libraries. An analysis of public library trends[6] found that the per capita number of library usage transactions rose 45 per cent in the past decade, from 16.6 to 24.1 transactions on average. Much of this increase in transactions was attributed to access of digital information: "use of electronic databases (library Internet subscriptions or

[4] Alvin M. Schrader, Michael R. Brundin. *National Statistical and Values Profile of Canadian Libraries.Report to Canadian Library Association Executive Council*. November 30, 2012.

[5] Department of Canadian Heritage, *Reading and Buying Books for Pleasure. 2005 National Survey.* March 2005.

[6] Lumos Research Inc. for Canadian Urban Libraries Council. *An Analysis of Public Library Trends*. April 2011.

stand-alone or networked CD-ROM databases) more than doubled, and Internet visits to library websites and catalogues grew five-fold in the period. Nevertheless, the number of items circulated per capita had also increased a substantial 16% over the past decade, while per capita in-person visits have remained stable".
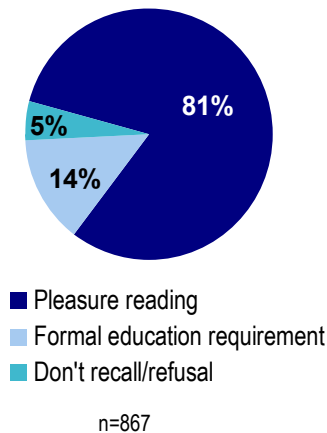
Of the 58 per cent of Canadian readers who have visited a library or online portal operated by a library in the past 12 months, most (81 per cent) have visited to borrow or access books for pleasure reading. Fourteen per cent visit a library as a requirement for formal education.

➤ Those who go to libraries for pleasure reading are more often women, seniors, Anglophones and higher income people ($120,000 and more) and located in rural centers and in the Prairie provinces.

➤ Those who go to libraries as a requirement of education are more likely to be men, under 35, have household incomes between $80,000 and $120,000, and are allophones. They are more likely to be located in Ontario and small urban centers.
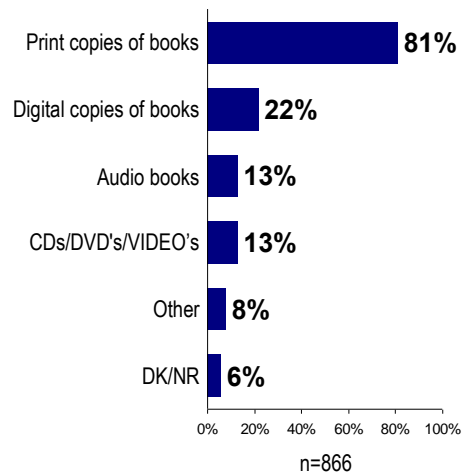
Library users mainly borrow print copies of books (81 per cent). One in five (22 per cent) accesses digital copies of books, while 13 per cent borrow materials other than books such as music and movie CDs and DVDs, and 13 per cent borrow audio books.

Library Usage

"Was this visit for....?"

"Which of the following do you borrow from public libraries?"

81%

5%

14%

■ Pleasure reading
■ Formal education requirement
■ Don't recall/refusal

n=867

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Print copies of books	81%
Digital copies of books	22%
Audio books	13%
CDs/DVD's/VIDEO's	13%
Other	8%
DK/NR	6%

0% 20% 40% 60% 80% 100%

n=866

ACP Survey, 2014

➤ Women are slightly more likely than men to borrow print books, as are parents. Library users between 35 and 64 are most likely to borrow non-book items.

➤ Library users from Alberta are more likely than those in any other province to borrow digital copies of books. Audio books are more popular in Saskatchewan and Manitoba than they are elsewhere in the country.
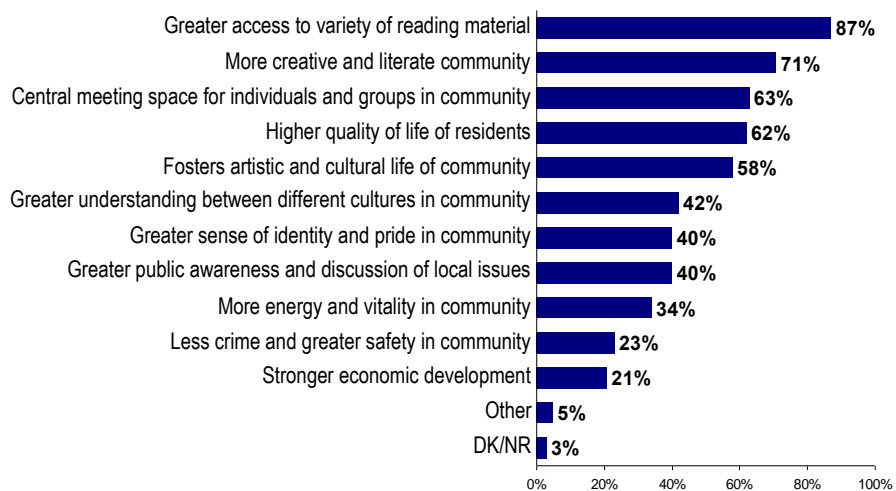
a)   Benefits of Libraries

All respondents were asked what they see as the main benefits of a public library in their community. The most frequently cited benefit is greater access to a variety of reading material (87 per cent). The value of libraries to the life of communities is also strongly felt, as indicated by the many community benefits that Canadians perceive. The second most frequently cited benefit is a more creative and literate community (71 per cent). This is followed by roughly six in ten citing libraries as providing a central meeting space for individuals and groups in the community, and a higher quality of life for community residents, as well as fostering artistic and cultural life of the community. About four in ten also see libraries as cultivating a greater understanding between different cultures in a community (42 per cent), greater public awareness and discussion of local issues (40 per cent), and/or greater sense of identity and pride in the community (40 per cent). One in five to one in three see libraries as creating energy and vitality in the community (34 per cent), decreasing crime and increasing safety in the community (23 per cent), and supporting economic development (21 per cent).

Likewise, a Canadian Heritage study[7] found that Canadians rated libraries highest of the facilities examined in terms of contribution to quality of life, above space for live performances, museums, multi-purpose facilities, heritage centres, art galleries, and artists' space.

Benefits of Libraries

"What do you see as the main benefits of a public library in your community?"

Benefit	Percentage
Greater access to variety of reading material	87%
More creative and literate community	71%
Central meeting space for individuals and groups in community	63%
Higher quality of life of residents	62%
Fosters artistic and cultural life of community	58%
Greater understanding between different cultures in community	42%
Greater sense of identity and pride in community	40%
Greater public awareness and discussion of local issues	40%
More energy and vitality in community	34%
Less crime and greater safety in community	23%
Stronger economic development	21%
Other	5%
DK/NR	3%

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n=1568

ACP Survey, 2014

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7   Phoenix Strategic Perspectives Inc. for Department of Canadian Heritage. *Arts and Heritage in Canada: Access and Availability Survey 2012*. November 2012.

- Women generally show a stronger appreciation for the benefits of libraries in access to reading materials and in the contributions made to community.

- Individuals with lower household income ($40,000 or lower) are more apt than those with higher income to cite many of the benefits of libraries, including: more creative and literate community, fostering artistic and cultural life of community, greater understanding between different cultures in community, greater public awareness and discussion of local issues, greater sense of identity and pride in community.

- Readers with a first language other than English or French are more apt to see libraries as offering a greater understanding between different cultures in the community and a safer community.

- Canadians living in large urban centers are more apt than those in smaller urban or rural locations to cite many of the benefits of libraries to community.

b) Learning about Authors Through Libraries

Over half of library users (55 per cent) have learned about an author at the library and then purchased one of the author's books as a result.

›   Those who read more intensely (six or more hours per week), along with those who spend moderate to higher amounts (i.e., $100 to $350 annually) to purchase books, are more apt than lighter readers and purchasers to have purchased an author's book as a result of learning about the author at the library.

c) Use of Libraries for E-books

Of those who borrow e-books from the library, seven in ten (77 per cent) said they are likely to use the services of a library to borrow e-books instead of buying an e-book at an online store. A further 16 per cent are moderately likely, and seven per cent are not likely.

Library E-Services

"How likely are you to use the services of a library to borrow e-books instead of buying an e-book at an online store?"

- Not likely (1-2)
- Moderately likely (3)
- Likely (4-5)

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n=180

ACP Survey, 2014
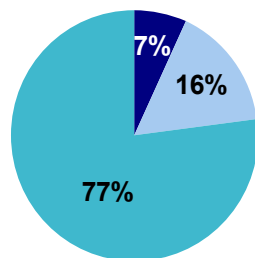
›   Respondents in Alberta are more likely than those in other provinces to use a library to borrow an e-book rather than buy an e-book online. This is also true of residents of rural locations, as well as those who spend the least amount on purchasing books on an annual basis.

Many library users in the focus groups have borrowed digital books. They like the convenience of remote access and some like that the copy disappears automatically without accruing late fees, which is seen as an added convenience for some. A few indicated they found the system of borrowing e-books at the library confusing or did not expect to have to wait for a copy of a digital book while in use by another borrower. A few do not like that the book was automatically returned (when not remembering the return date or expecting it).

2.5   ACCESSING FREE E-BOOKS

About a third of Canadians (35 per cent) have accessed free digital books in the last 12 months.

Table 2.3: Accessing e-books without payment by demographics

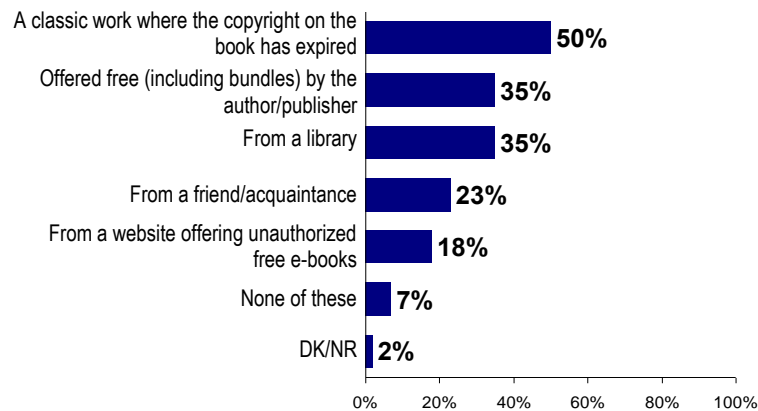| Many people access e-books for free. Have you accessed any e-books for free in the past 12 months?	Yes
Overall	35%
Age	
<34	42%
35-54	39%
55+	27%
Income	
<$40k	28%
$40-80k	31%
$80-120k	36%
$120k+	42%
Book Reading Hours	
Light (1-5)	36%
Medium (6-10)	43%
Heavy (+10)	44%
Read for School/Work	
Yes	43%
No	34%
Book Purchases/12 Months	
Low	37%
Medium	37%
High	43%

Library User	
Yes	44%
No	24%

> Readers who are more apt to have accessed books for free are under the age of 35 and the most affluent readers (reporting household incomes above $120,000). The concentration is also higher in Ontario and among residents living in the largest cities.

> When speaking only of Canadians who are book readers, 39 per cent have accessed a digital book without paying, and 34 to 37 per cent of those who read websites or blogs, magazines, and newspapers have done the same.

> Those who access e-books for free tend to be medium to heavy readers.

In all focus groups, there were many participants who were largely unfamiliar with the practice of gaining unauthorized access to digital books; they had not personally accessed digital books without permission and were not aware that others are doing this to any large extent. Awareness of unauthorized digital book access seemed to be highest in Ottawa, where there were many participants who read e-books and a considerable amount of online content. In Halifax, there was some limited knowledge of Access Copyright's current legal action (known to a participant who is an author). There were a few participants in the Calgary group who had personally gained unauthorized access to a digital book.

Half of those who have accessed a free book in the last 12 months said that these were classic works with an expired copyright (50 per cent) and another 35 per cent said that these were offered by the author or publisher in a bundle with other (purchased) materials. An equal proportion (35 per cent) had obtained these books from the library. One in five has obtained books from a friend or acquaintance. Only 18 per cent reported that they had obtained unauthorized e-books, which is six per cent of Canadians overall.

Reasons for Accessing Books Without Paying

"Was/were the e-books you accessed for free...?"

Category	Percentage
A classic work where the copyright on the book has expired	50%
Offered free (including bundles) by the author/publisher	35%
From a library	35%
From a friend/acquaintance	23%
From a website offering unauthorized free e-books	18%
None of these	7%
DK/NR	2%

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n=518   ACP Survey, 2014

> Those accessing unauthorized e-books are more likely to be under 35, and report lower household incomes.

> Those accessing free books as bundles from authors or publishers are more often men and are typically reading digitally rather than hard copy, relative to their counterparts.

> Those accessing classics with expired copyrights are more often men, people with higher incomes ($120,000 or higher), and light weekly readers (under five hours). The incidence is also higher among people who read for school or work than those who do not, and also among those who report spending moderate to higher amounts for books that they have purchased.

> Those accessing free e-books from libraries are more often women, and are typically reading digitally rather than hard copy.
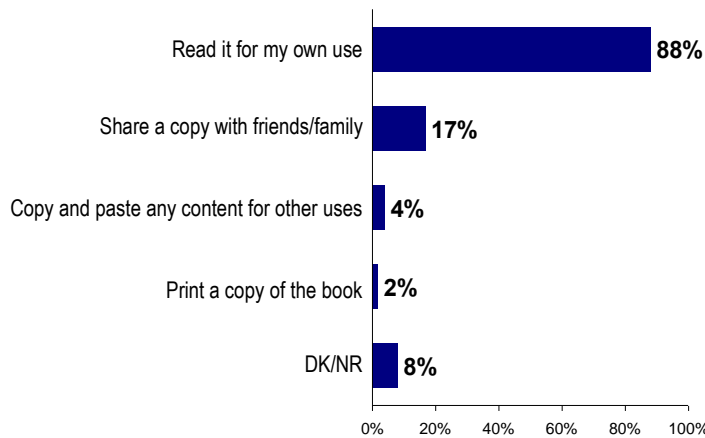
Some focus group participants were unaware of the illegality of accessing digital books

without authorization, but had the feeling that it should be against the law. A few participants spoke of there being a lot of "loopholes" that make it difficult to regulate and monitor digital book access/sharing. One said, "It's [the Internet] the wild west as far as copyright goes", with several agreeing that they do not get the impression that anyone is monitoring this or has any ability to do anything about it.

When asked what happens to purchased e-books after the purchaser has read them, the large majority (88 per cent) say that they keep them for their own use. Seventeen per cent say that they share them with friends and family. Four per cent say that they copy and paste the content for others to use and two per cent say that they print a copy of the book.

Further Uses of E-Books

"After purchasing an e-book, do you…?"

Category	Percentage
Read it for my own use	88%
Share a copy with friends/family	17%
Copy and paste any content for other uses	4%
Print a copy of the book	2%
DK/NR	8%

EKOS Research Associates Inc.

n=567

ACP Survey, 2014

In focus groups, there was some divergence on whether sharing individual digital books, person to person, is as morally and legally wrong as unauthorized book access/sharing on a mass scale. In Calgary and Winnipeg, most participants felt it should be fine to share e-books between individuals, but mass sharing is not okay. A few participants said, however, that sharing even one book goes against copyright and, therefore, "how is mass sharing any worse?" Others wondered if it is less wrong to share/access certain kinds of books, such as obscure or banned books or books that are not available in physical copy – books that readers cannot easily buy "because the publisher doesn't think it's important enough to publish." Some feel that there can be positive results to accessing books for free, like stimulating legitimate purchases of the book and other books by the author or on a similar topic.

The survey also explored Canadians' understanding of the unauthorized downloading of e-books. Overall, unauthorized downloading is not seen as a particularly troublesome issue, with only one in six respondents (17 per cent) rating it as a serious problem. Further, one-quarter (28 per cent) see unauthorized downloading as a non-issue, and 21 per cent see it as a moderate problem. It is important to note, however, that one-third of respondents (34 per cent) do not consider themselves to be sufficiently informed to provide an answer, suggesting relatively low public familiarity with this issue.

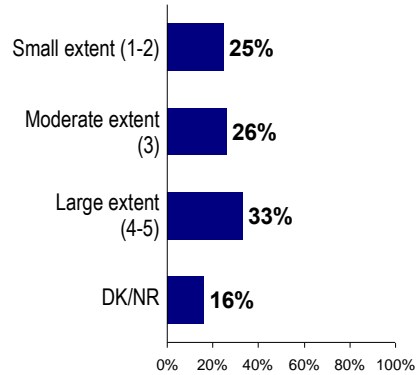Results also reveal divided views on the need for a public awareness campaign to combat unauthorized downloading. One-third of respondents (33 per cent) perceive a pressing need for such a campaign, although nearly as many (25 per cent) believe this campaign would be a waste of resources. One-quarter (26 per cent) believe there is a moderate need for an anti-pirating campaign and one in six (16 per cent) offered no response.

Unauthorized Downloading

"From what you have seen or heard, how much of a problem is the unauthorized downloading of e-books online?"
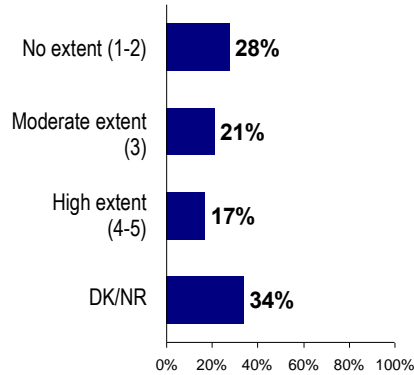
"To what extent is there a need for a public awareness campaign that emphasizes the ethical considerations and harmful effects of unauthorized access of books placed online?"

No extent (1-2)	**28%**
Moderate extent (3)	**21%**
High extent (4-5)	**17%**
DK/NR	**34%**

0% 20% 40% 60% 80% 100%

Small extent (1-2)	**25%**
Moderate extent (3)	**26%**
Large extent (4-5)	**33%**
DK/NR	**16%**

0% 20% 40% 60% 80% 100%

**EKOS Research Associates Inc.**

n=1590

Book Strategy, Wave 2, 2014

> Certain groups – particularly men, those under the age of 35, and e-book users – are considerably more likely to feel informed enough to answer the question, suggesting greater familiar with issues related to digital piracy. These same groups, however, also tend to be the demographic of the view that unauthorized downloading is not a major concern. They are, therefore, also more likely to argue against the need for a public awareness campaign.

The survey also obtained reactions from those who believe that a campaign is at least moderately necessary about the effectiveness of three potential messages or approaches that could be used to discourage the unauthorized downloading of books online. More than half of respondents who believe a campaign is needed believe that reminding consumers of the need to compensate authors, or authors and publishers, (56 to 57 per cent) would be an effective message. A similar proportion (51 per cent) believe that using imagery of a healthy and sustainable book industry that affords authors a decent living would be an effective deterrent to downloading. Just over four in ten (44 per cent) believe that reminding would-be downloaders of the legal and ethical implications of their actions would help curb pirating.

Effective Messages on Unauthorized Downloading

"How effective do you think that messages that emphasize the following would be in making Canadians more conscious of the harmful effects of unauthorized downloading of books online?"

* Half sample

EKOS Research Associates Inc.
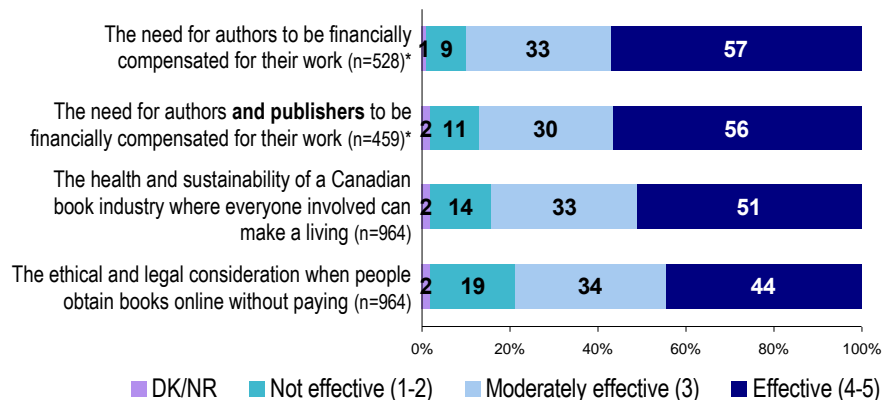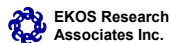
Book Strategy, Wave 2, 2014

> ❯ Women are more positive than men in each instance, and men in particular are more likely to disagree regarding the ethnical and legal considerations when people obtain books online without paying for them.

> ❯ Those reporting household incomes of $40,000 or less find these arguments particularly compelling.

When asked to describe, in their own words, what they feel would be effective in making Canadians more conscious of the harmful effects of unauthorized downloading, responses largely fell into the following four thematic areas, illustrated with some key examples of individual responses.

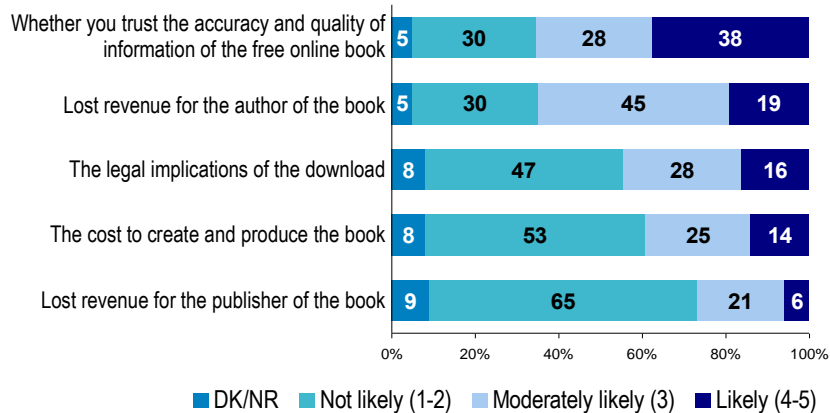| What would be effective in making Canadians more conscious of the harmful effects of unauthorized downloading of books online?	
Associating the loss with the authors/writers themselves, negative impacts on them directly	Show that it is the actual author of the book that is taking the hit.
	Impact on individual authors, especially finance.
	A known author speaking in a short ad stating how the loss of income has affected his or her life and ability to continue writing.
	A friendly disclaimer that (..) you are buying from a legitimate source and helping to support authors.
	Highlight the struggle that authors go through to publish a book and the poor reward for the effort.
Effective punishment, negative consequences, penalties for downloading (fines, incarceration...)	Prominent prosecution of an offender.
	Being aware of the legal implications.
	Make it a criminal offence and prosecute accordingly.
	Fines and penalties.
	People who download without paying would only pay attention if there was a negative consequence for them if they were caught.
Increased advertising, creating public awareness (print, on line, TV/radio...)	Raising awareness would be number 1. I don't think it is an issue that is frequently addressed.
	Advertising on Google or search engines.
	Online awareness and government publication.
	Book marks at the library, customizing plastic bags that you get at the bookstore.
	TV Commercial.
Associating the behaviour with theft/stealing, equivalent to stealing physical property	Drawing the comparison that stealing a book (by illegal downloading) is like stealing from the corner store.
	Make them aware that downloading is similar to shop lifting/stealing.
	It's theft, pure and simple.
	Early education about fraud and theft.
Communicating the message with an information/education approach, informative focus (industry stats, how big a problem it is and why, negative impacts to the industry, businesses and their economic value)	More publicity and articles written about the problem
	Communicating the possible effect that the availability of new books in the future may be in jeopardy if authors and publishers don't receive remuneration for their efforts.
	Bad for the economy.
	Numbers and statistics showing the losses to authors
	We should all talk about copyright infringement as a moral and financial issue that is affecting the livelihood of countless people throughout the world.

b)   Implications of Downloading Free Books

People who have accessed e-books online without paying were asked about some implications of doing this. The aspect of a book that Canadians would be mostly likely to consider if they were to access a free book online (one not offered for free by the publisher or as a promotion) is the accuracy and quality of information in the book. Almost four in ten Canadians (38 per cent) would consider whether they trust the information contained in the book. Approximately three in ten Canadians, however, would be unlikely to consider this factor when accessing a free book online.

If they were to access a free book online, three in ten (30 per cent) would be unlikely to consider the lost revenue to the author, although 19 per cent would consider this. Almost half (47 per cent) would be unlikely to consider the legal implications of the download and only 16 per cent would be likely to consider this. Half (53 per cent) would be unlikely to consider the cost to create and produce the book and just 14 per cent would consider this. A full two in three Canadians (65 per cent) would be unlikely to consider the lost revenue for the publisher of the book, and only six per cent say they would be likely to have this impact in mind.

Factors Influencing Free Downloading

"If you were accessing a free book online (one not offered for free by the publisher or as a promotion), how likely are you to consider the following?"

	DK/NR	Not likely (1-2)	Moderately likely (3)	Likely (4-5)
Whether you trust the accuracy and quality of information of the free online book	5	30	28	38
Lost revenue for the author of the book	5	30	45	19
The legal implications of the download	8	47	28	16
The cost to create and produce the book	8	53	25	14
Lost revenue for the publisher of the book	9	65	21	6

EKOS Research Associates Inc.

n=87

ACP Survey, 2014

> Women are more likely than men to consider the legal implications of the download, although only 24 per cent of women said they would.

> Light book readers and magazine readers are more likely to consider the cost to create and produce the book, although only 22 to 25 per cent said they would.

There was a clear and strong view expressed by most focus group participants that unauthorized access of digital books is morally and ethically wrong, shared even by participants with experience gaining unauthorized access sharing this view. There was a strong understanding that "it's infringing on someone's livelihood" especially the livelihood of authors. Some participants raised the point that others in the book publishing chain are affected by the practice, pointing to designers, artists and illustrators, publishers, and retailers as people who lose out. Participants said that the ultimate impact of the practice is that "everyone pays"; prices go up, and authors have a difficult time earning an income and may stop creating.

Comparisons to the music industry were discussed as a few participants indicated that people may be more inclined to think it is wrong to steal a book than it is to steal music or a movie. Some participants said there is more sympathy for authors and awareness that authors are hurt when people do not pay for books, while the creators of music and movies do not garner the same level of sympathy. Some participants, however, feel that the public is generally inclined to think that digital books are valued differently from physical books: people will not walk out of a store with a stolen book, but when it is available online it feels insignificant and harmless to take (e.g., "it's a bit like taking a pen", everyone does it and it's considered harmless). Some participants said this attitude goes hand in hand with a lack of respect for the arts in general and a lack of the understanding of the value of artistic products. One person said that, "If we want to read good books, everyone needs to get paid."

c)   Willingness to Pay for Books

Canadians would be most compelled to pay for books by an argument that indicates how their payment helps support authors. Other arguments that may be compelling for some highlight how payment supports the book industry and assures quality and accuracy of content. Canadians are more willing to pay for books, rather than obtaining them for free, if they know that paying means that the author is paid for their work (66 per cent). The majority are also willing to pay if they know that it supports the book industry (52 per cent) and if it increases the accuracy, reliability, and overall quality of the information in the book (52 per

cent). A smaller proportion of Canadians are willing to pay for a book in order to ensure that publishers are paid for their work (43 per cent).

Factors in Willingness to Pay for Books

"How willing are you to pay for books (compared to obtaining books for free) if...?"

	DK/NR	Not willing (1-2)	Moderately willing (3)	Willing (4-5)
It ensures that the author is paid for their work	3	10	21	66
It supports the Canadian book industry	4	16	28	52
It increases the accuracy, reliability, and overall quality of the information in the book	7	16	25	52
It ensures that the publisher is paid for their work	4	23	30	43
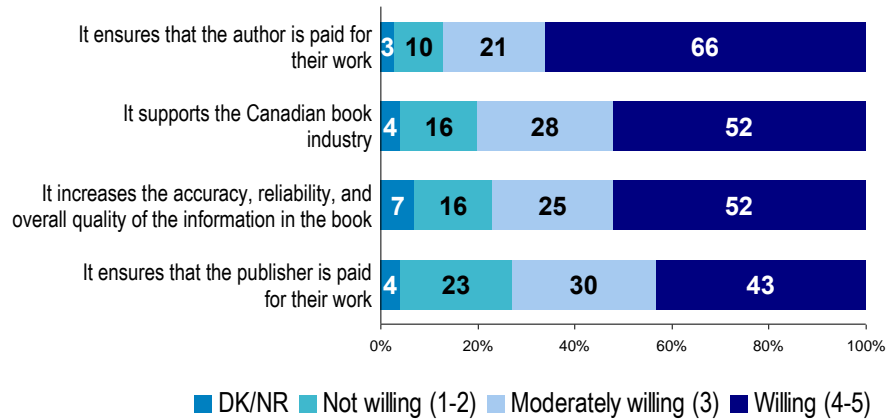
EKOS Research Associates Inc.

n=1320   ACP Survey, 2014

> Women are more likely than men to pay for a book if they know it ensures the publisher is paid for their work. Men are more likely than women to find the argument of accuracy and quality to be compelling. Both are equally willing to pay in order to ensure authors are paid and that it supports the book industry.

> People between ages 35 to 64 are more likely to pay if they are aware of any of these arguments. Those under 35 are particularly unconvinced by the argument that paying for books ensures that publishers are paid for their work (28 per cent rating themselves unwilling to pay if they were told this).

> Those with incomes under $40,000 and those whose first language is French are less likely to be convinced by knowing that it increases the accuracy, reliability, and overall quality of the information in the book. People with incomes between $80,000 and $120,000 are more likely to pay if they know that authors will be paid for their work. People with incomes over $120,000 are more likely to pay if they know the publisher gets paid for their work.

> People in Quebec and those who read for school or work, are heavy book purchasers, and library users are more willing to pay for a book if they hear any of these arguments.

In all focus groups, participants agreed that there should be some concerted effort to

raise public awareness about unauthorized access to e-books. The groups also indicated, however, that it would be a difficult message to deliver. Some said it may take a long time to change attitudes – maybe 20 years before there is a culture of respect for intellectual property, but there was widespread recognition of a need to work toward changing attitudes and behaviours.

Participants were very clear that any message about the cost of illegal sharing to book publishers would be received with scepticism. Several feel the general public would not be sympathetic to hearing a message from book publishers, who they see as disconnected from the public and economically privileged. That said, they feel the public is inclined to sympathize with authors and creators, and that they could have more sympathy for publishers if there were more transparency about the role of the publisher, what is involved in creating a book, and who else is involved and in what ways. Nonetheless, authors are generally regarded as being more credible spokespeople than publishers, and most feel that people could care if they were made to "think from the author's perspective". Other points that were brought up about communicating with the public are the following:

> People should be told how pervasive the issue is and how much it is actually costing those involved in creating and publishing books (i.e., how damaging or threatening this is to the Canadian industry).

> There is a need for messages that speak directly to young people. Many feel that educating the public needs to begin with educating children and young adults because it is when they are young that they do not understand consequences, and they form their values and judgments of right versus wrong. Some suggested engaging authors who are popular with young audiences to deliver messages. Some talked about developing a campaign to reach kids in schools. "Play on the dreams and aspirations" of young people who might want to grow up to be writers; create an engaging call to action that kids will remember (the way kids remember "Stop, drop and roll!"); and make the issue a part of the books children read in school.

> Make it a topic of discussion in the places where people talk about and learn about books. Use initiatives like *Canada Reads* to engage the public broadly in a discussion about the value of Canadian books and the need to support the industry to ensure its health.
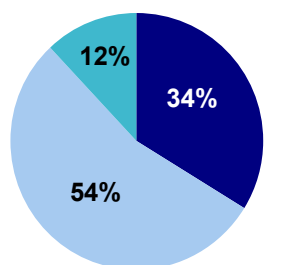
> Some participants said that prosecution of offenders should be part of a multidimensional strategy. Other participants focused on the need for education and a dialogue about right versus wrong; some participants felt that focusing on legality would be rigid and ineffective for changing behaviour. A few felt that it would be useful to know more about the legal implications of unauthorized access. Others indicated confusion about which kind of activities are illegal, suggesting that education efforts need to clarify some "grey areas", like whether it is legal to access and share books with expired copyrights.

> Some said that the government should take responsibility in communicating with the public about these issues through both education and regulation efforts.

> "Buy local" campaigns were mentioned by one participant as a model that has had success in making people feel good about supporting an industry once they understand the importance of the issue and the broader implications of their behaviour.

> The film industry's effort to educate the public on the legal implications of piracy (e.g., the warning before films) was noted by one participant as widely recognizable/memorable.

d) Digital Rights Management

A portion of the respondents were asked, without the aid of a definition, if they were familiar with the term Digital Rights Management or DRM as it relates to digital or e-books. One-third (34 per cent) of respondents said they have heard of DRM. Another portion were provided with an aided description of DRM and asked if they were aware of the technology. Of these, one-quarter (26 per cent) indicated they have heard of DRM.

Awareness of Digital Rights Management

"Have you ever heard the term Digital Rights Management or DRM as it relates to digital or e-books?"
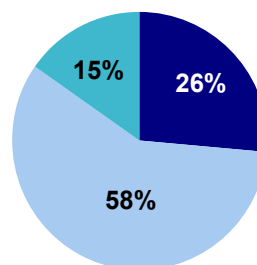
"Digital Rights Management (DRM) is technology put in place to restrict access to, copying and printing of digital material based on copyright. Have you ever heard of this before?"

34%

54%

12%

n=689

26%

58%

15%

n=476

■ Yes
■ No
■ Not sure if I have heard it or not

EKOS Research Associates Inc.

ACP Survey, 2014

› Based on responses to the aided question, younger Canadians (under 35) and people who read for school or work are more likely to have heard of DRM. Familiarity is lowest among seniors and those with household incomes between $40,000 and $80,000.

Among those who have heard of DRM, the majority (60 per cent) understand that DRM protects the publisher and author from piracy. Four in ten (43 per cent) believe that DRM prevents them from sharing an e-book. One-third (32 per cent) believe that DRM does not have any impact on their e-reading experience. Fewer than one in five believe that DRM prevents them from owning the e-book (17 per cent) or that DRM forces them to read within an ecosystem (18 per cent). Twelve per cent declared that if an e-book has DRM they would not buy it.

› Men are more likely than women to say that DRM prevents them from sharing an e-book, forces them to read in an ecosystem, and prevents them from owning an e-book. They are also more likely to say they would not buy an e-book with DRM.

› Younger people (age 35 and younger) are more apt than Canadians over age 35 to say that most of these statements are true, except that DRM protects the author and publisher from piracy.

› Those who have accessed free e-books are more likely than those who have not to indicate that DRM prevents them from owning the e-book, DRM forces them to read within an ecosystem, and that if an e-book has DRM they would not buy it or they would remove it.
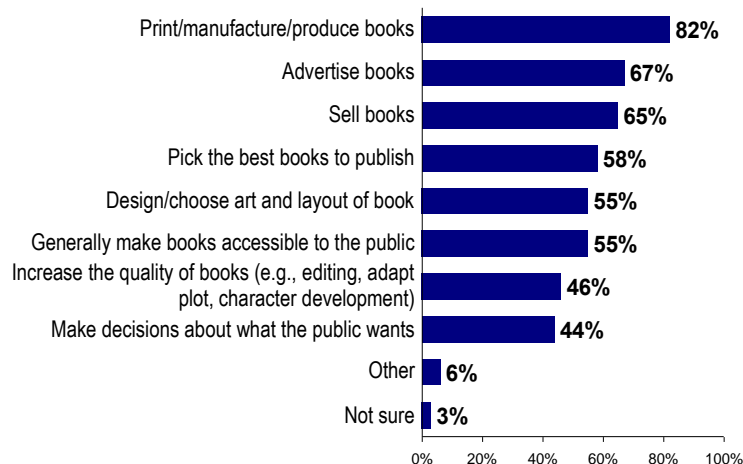
2.6   BOOK PUBLISHING

a)   Public Perception of the Role of Publishers

Half of the sample was asked their views on the role of the book publishing industry. The most commonly understood role of book publishers is to print, manufacture, and produce books (82 per cent). Publishers are also seen as being responsible for advertising (67 per cent) or selling books (65 per cent). Between five in ten and six in ten Canadians identify other elements of publishing companies such as picking the best books to publish (58 per cent), making books accessible to the public (55 per cent), and designing or choosing the art and layout of the book (55 per cent). Just under half (46 per cent) believe that book publishers improve the quality of books (through editing, adapting the plot, character development) and/or make decisions about what the public wants (44 per cent).

Perceived Role of Publishers

"From what you know, what is the role of a book publishing company?"

Role	Percentage
Print/manufacture/produce books	82%
Advertise books	67%
Sell books	65%
Pick the best books to publish	58%
Design/choose art and layout of book	55%
Generally make books accessible to the public	55%
Increase the quality of books (e.g., editing, adapt plot, character development)	46%
Make decisions about what the public wants	44%
Other	6%
Not sure	3%

EKOS Research Associates Inc.

n=816   ACP Survey, 2014

> Women generally have a broader appreciation for the diverse role of publishers than men do. They are more likely than men to say advertising books, picking the best books to publish, designing the art and layout of the book, and making decisions about what the public wants as roles of book publishing companies.

> Those who read digitally and those who are moderately heavy readers (e.g., reading an average of six to ten hours per week) are also more appreciative of the diverse role of publishers.

‣ Those who spend the most on books stand out from lower spenders in their identification of publishers as picking the best books to publish, improving the quality of books and generally making books more accessible to the public.

‣ Those who read for work or school are more apt than those who do not to say that publishers improve the quality of books and are responsible for design and layout.

‣ Canadians who typically read books (i.e., have read books in the past three months) are more likely than those who have not to point to many roles of publishers, including: advertise books, sell books, pick the best books to publish, design art and layout of the book, make books accessible to the public, and improving the quality of books.

‣ The advertising role and responsibility for improving content quality is more apparent to the most affluent (reporting household incomes over $120,000).

Canadians believe the most important role book publishers play is the printing, manufacturing, and production of books (58 per cent). Half of Canadians (52 per cent) also believe making books accessible to the public is an important role. Over four in 10 Canadians see increasing the quality of books (46 per cent) and/or the advertising of books (45 per cent) as an important role that book publishers play. Similarly, just under four in 10 believe that picking the best books to publish (40 per cent) and selling books (39 per cent) are important roles for book publishers. Only around one-quarter of Canadians believe that anticipating what the public wants (28 per cent) and designing/choosing art and layout of books (23 per cent) are among the most important roles.

Role of Publishers

"From what you know, what do you see as the most important roles that book publishers play?"

Role	Percentage
Print/manufacture/produce books	58%
Generally make books accessible to the public	52%
Increase the quality of books	46%
Advertise books	45%
To pick the best books to publish	40%
Sell books	39%
To anticipate what the public wants	28%
Design/choose art and layout of books	23%
Other	4%
DK/NR	5%

EKOS Research Associates Inc.

n=1590

Book Strategy, Wave 2, 2014
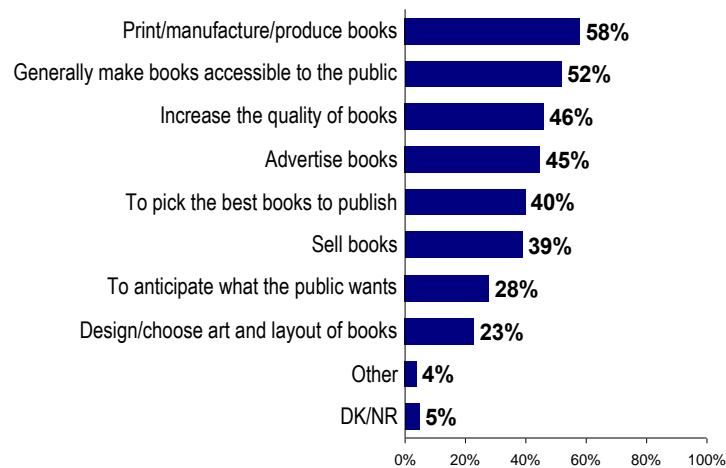
- Those who see making books accessible to the public as one of the most important roles are more often women, Canadians over 55, and those who read and purchase books intensely, while men, the most affluent, and non-book readers who are much less likely to say this.

- Older Canadians are more likely to see increasing the quality of books as an important role.

- Canadians with household incomes of less than $40,000 are more likely to see designing/choosing art and layout of books as an important role for book publishers.

In all focus groups, participants felt they had limited, if any, understanding of what role publishers play, and 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. Participants mentioned the following roles of publishers:

- To identify authors to write a book, and make critical decisions about which books/authors to publish. Some feel publishers are risk takers who need to be good at determining which books will be popular or will have lasting importance. That said, a participant raised a concern that publishers are "sitting on their hands" waiting for books to come to them, rather than actively seeking out potential books. A few participants mentioned with some cynicism that publishers are primarily profit driven, "out to make a buck" which limits their willingness to take risks with what they publish. Some talked of the need for publishers to take more risks and invest more in new Canadian talent to ensure the success of the next generation of Canadian authors. Participants in Calgary mentioned that Canadian publishers are important for getting Canadian authors published.

- Edit, proofread, critically assess the writing and the quality of the content, and improve the writing style. Some indicated that publishers can recommend substantial changes to a manuscript. A few participants raised concerns, however, that the quality of book editing is not what it used to be – they pointed to typos and errors in books that make them think the calibre of writing and editing is going down. Participants in one group indicated that publishers should be responsible for ensuring a manuscript does not plagiarize another source.

- Promote books and assist the author in gaining exposure. Some participants expressed concern, however, that publishers do not do as much marketing as might be expected, or that authors play a substantial role in marketing. "Publishers have a long book list and can only spend so much time on [promoting] one author," a participant said, and another indicated that authors are left with the cost of hiring their own marketing staff.

> Make design, layout, and cover choices.

> Work with authors to shape the content of a book. This was generally a less mentioned or less obvious role of publishers. Some participants talked about this in terms of publishers of children's books having a role in shaping a book's content.
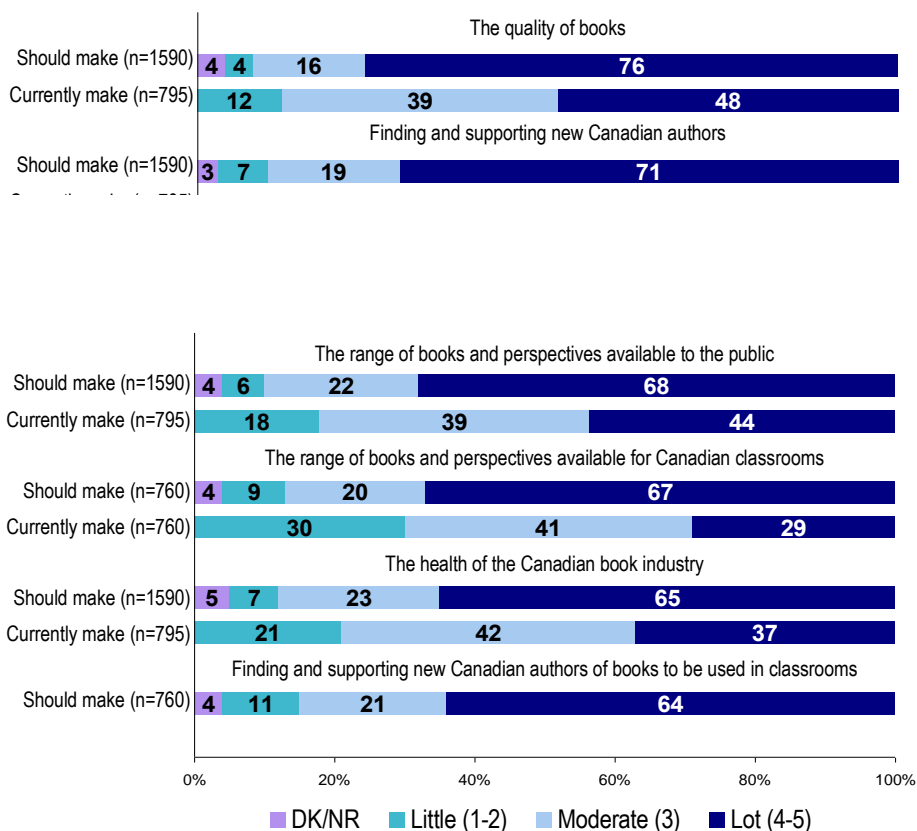
b) Perceptions of Gap in Role of Publishers

When asked their opinion in regards to how much of a contribution publishers should make to elements of Canadian books (quality, health of industry, range of books and perspectives, and finding/supporting Canadian authors) two in three or more Canadians believe publishers should contribute extensively. The quality of books and supporting new authors are the two areas where the largest proportion of Canadians see the need for a strong contribution from publishers, with 76 and 71 per cent respectively indicating the publisher should contribute more than a moderate amount. Respondents were also asked about the role that publishers currently play even though the researchers did not truly expect that the general public would be in a position to know this with any accuracy. Therefore, results are clearly based on public perception, and in fact one in three or more survey respondents indicated that they could not answer on these points. The purpose of this set of questions was to explore the extent to which there is a public perception of a gap between what publishers should be doing and what they are doing in each of these areas. As anticipated, even among the two in three respondents who provided a response, a comparison with the views on the roles that publishers should play suggests that the public believes that publishers should be contributing considerably more than they are currently contributing to the quality and diversity of books, and in finding and supporting new authors and the health of the Canadian book industry.

In terms of the education sector, Canadians also believe that publishers should play a strong role in the quality and range of books, as well as in finding/supporting Canadian education authors. In each case, two in three see publishers as needing to play more than a moderate role. And, as with the commercial side, Canadians also perceive a gap in the role that publishers currently play relative to the ideal contribution that publishers could be making.

Perceptions of Gap in Role of Publishers

**"In your opinion, how much of a contribution should publishers make to…/
From what you know, how much of a contribution do publishers currently make to...?"**

The quality of books

Should make (n=1590)	4 / 4 / 16 / 76
Currently make (n=795)	12 / 39 / 48

Finding and supporting new Canadian authors

Should make (n=1590)	3 / 7 / 19 / 71

The range of books and perspectives available to the public

Should make (n=1590)	4 / 6 / 22 / 68
Currently make (n=795)	18 / 39 / 44

The range of books and perspectives available for Canadian classrooms

Should make (n=760)	4 / 9 / 20 / 67
Currently make (n=760)	30 / 41 / 29

The health of the Canadian book industry

Should make (n=1590)	5 / 7 / 23 / 65
Currently make (n=795)	21 / 42 / 37

Finding and supporting new Canadian authors of books to be used in classrooms

Should make (n=760)	4 / 11 / 21 / 64

Legend: DK/NR / Little (1-2) / Moderate (3) / Lot (4-5)

EKOS Research Associates Inc.

Book Strategy, Wave 2, 2014

❯ Women, those over 55 years of age, and readers (compared with non-readers), in particular those who spend more on books are more apt than other respondents to see the role that publishers should play as strong.

❯ Similarly, women and readers (compared with non-readers), in particular those who read the most, are more favourable than others in their views of what publishers contribute in many of the areas tested.

c) Self-Publishing versus Traditional Publishing

Most Canadians (71 per cent) are aware that some authors publish books themselves without going to a publishing company, otherwise known as self-publishing, although one in ten (eight per cent) are not aware of this and 21 per cent are not sure.
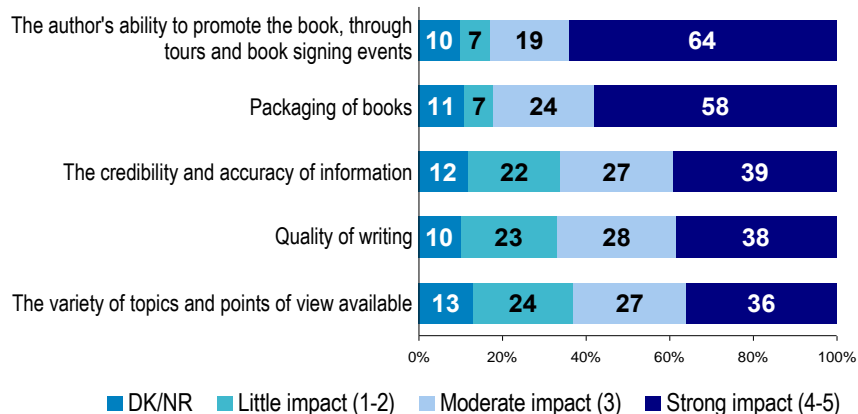
› Higher income Canadians ($120,000+) are more likely to be aware of self-publishing compared to lower income Canadians.

› Residents of the largest cities are more often aware of self-publishing than those in smaller urban or in rural areas.

› Canadians who have accessed free e-books are more likely to have heard of self-publishing.

› Individuals who read books, magazines, newspapers, and websites or blogs are all more apt to have heard of self-publishing than those who do not, as is the case with those who read books digitally and/or read for school or work, and library users.

Participants were well-aware of self-publishing as an alternative to having a book published through a conventional publisher; in one centre (Calgary), the majority of participants mentioned having purchased a self-published book. (In contrast, some participants in Ottawa said they would not know if a book was self-published, given that they do not tend to pay attention to publishers.) Participants perceive both advantages and disadvantages of self-published books. Almost everyone acknowledged a "stigma" around self-publishing, but generally there was a sense that this stigma is unfair and may be waning. Many feel that self-publishing is a good opportunity for authors to "get their books out there". In all focus groups, participants expressed sympathy for authors whom they perceive as not being fairly compensated for their work, and some participants pointed out that self-publishing could be a way for authors to set their own price and not lose some of their book revenues to a publisher. Some participants said self-publishing is "the way of the future" because it "cuts out the middle man" leaving more autonomy for the author.

Thinking about books that are published by a publishing company versus books that are published by authors themselves, respondents were asked how much of an impact publishing companies have on the book created. Almost two-thirds (64 per cent) feel that publishing companies have a strong impact on the author's ability to promote the book, through tours and book signing events. Over half (58 per cent) see a strong impact from the involvement of publishers on the packaging of books. Just under four in ten believe that publishers have a strong impact on the credibility and accuracy of information (39 per cent), quality of writing (38 per cent), and/or the variety of topics and points of view available (36 per cent).

Publishers' Impact on Book

"Generally speaking, thinking about books that are published by a publishing company versus books that are published by the author themselves, how much of an impact do publishing companies have on the book created in each of the following areas?"

Category	DK/NR	Little impact (1-2)	Moderate impact (3)	Strong impact (4-5)
The author's ability to promote the book, through tours and book signing events	10	7	19	64
Packaging of books	11	7	24	58
The credibility and accuracy of information	12	22	27	39
Quality of writing	10	23	28	38
The variety of topics and points of view available	13	24	27	36

■ DK/NR   ■ Little impact (1-2)   ☐ Moderate impact (3)   ■ Strong impact (4-5)

EKOS Research Associates Inc.

n=769

ACP Survey, 2014

> Those who read magazines and/or newspapers are more likely to indicate that publishers have a stronger impact on the quality of writing. Those who read newspapers are more likely than those who do not to indicate that publishers have a stronger impact on the packaging of books, the author's ability to promote the book, the credibility and accuracy of information. Magazine readers are more likely to feel there is an impact on the variety of content available.

> Those who spend the most on books are also most often convinced that publishing companies have a strong impact on the quality of writing.

> Those who read websites or blogs, along with social media users, are more apt than non-users to indicate that book publishers have little impact on the variety of topics and points of views available.

> Heavy readers (10 or more hours per week) are more apt than lighter readers to indicate that book publishers have a stronger impact on the variety of topics and points of views available. Moderate readers (six to 10 hours per week) are more apt to be convinced of the impact of publishers on the author's ability to promote the book.

> Women are more convinced than men about the impact of publishers on the quality of writing, the accuracy of the information in the book, the variety of topics and points of view available, and the author's ability to promote the book.

> Seniors are more apt to see the impact of publishers on the quality of writing and the variety of topics available to the public.

Only three in ten (30 per cent) believe that knowing that a book is self-published has an impact on their trust in the accuracy and quality of information in the book. Just over half (53 per cent) of Canadians feel that the fact that a book is self-published does not have an impact on whether they trust the accuracy and quality of information of the book. Sixteen per cent are not sure.

Impact of Self-Publishing

"Does the fact that the book is self-published have an impact on whether you trust the accuracy and quality of information of the book?"

- ■ Yes
- ■ No
- ■ Not sure

EKOS Research Associates Inc.

n=1086

ACP Survey, 2014
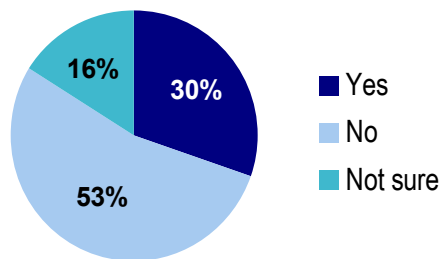
- Men are less likely than women to distrust the accuracy and/or quality of a book that is self-published.

- Those who have read magazines, websites or blogs recently, and/or use libraries are more likely to say that whether or not a book has been self-published impacts their view of the information in the book.
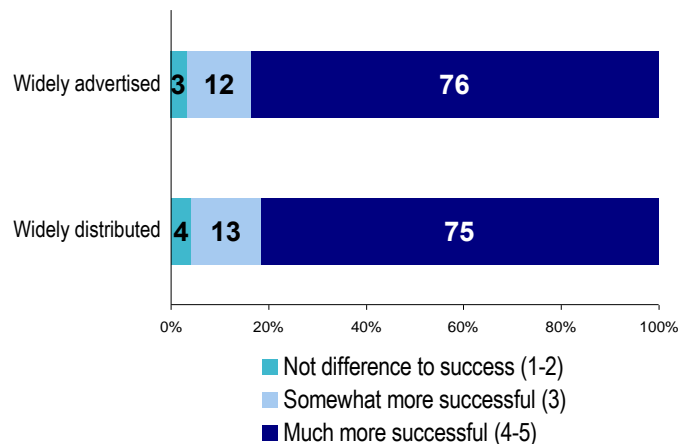
Some participants expressed the impression that most self-published books are books that "no one wanted to publish"; "there is a reason they are self-published." Participants in all groups raised concerns that the quality of writing in some self-published books is not as high as for conventionally published books, presumably because they do not undergo the same rigourous editing. (There was a suggestion from one participant that, as a possible means for additional revenue, publishers could be offering their proofreading services to authors who wish to self-publish.) On the other hand, various participants said that self-published books do not necessarily mean lower quality. According to one participant, "Publishers have always put out propaganda that self-published authors are crappy. That's changing now" as more authors are seeing how they can benefit from self-publishing and readers are discovering enjoyable self-published books.

Some participants mentioned that self-published books play an important role in putting out riskier content or information on obscure fields/topics where the market is small, for which publishers would be less likely to publish. Some also mentioned impressions that self-published non-fiction and children's books can be quite good, although with the assumption that self-published books in other areas may not be as high quality: "Sometimes there are some duds, but sometime you find some neat stuff," said one participant in Winnipeg. Others mentioned that self-publishing can be "really exciting" and "the best way to find the next great author." The quality of writing and content of self-published books was the focus of most participants' comments; only a few mentioned concerns with other elements such as design, layout, and durability. According to these participants, self-published books may not stack up against conventionally published books in this regard.

Comparing books that are published by a publishing company with books that are self-published, most (76 per cent each) feel that publishing companies have a strong impact on the success of books in terms of how widely they are advertised, and how widely they are distributed (75 per cent).

Publishers' Impact on Promotion-Distribution

"How widely books are advertised, promoted, and publicized and distributed?"

Legend:
- Not difference to success (1-2)
- Somewhat more successful (3)
- Much more successful (4-5)

EKOS Research Associates Inc.

Book Strategy Group, 2014

> Canadians between the ages of 35 and 54 as well as those who have read websites or blogs recently are more apt than others to believe that publishing companies increase the success of a book through advertising/promotion and distribution.

> Distribution of the book is an impact seen more often among the most affluent Canadians (reporting household incomes of $120,000 or greater).

Focus group participants were asked to identify who receives a portion of the sales of a book. Almost everyone said they believe that publishers get a big proportion of the sale of a book (if not the biggest), with some stating that they believe a publisher would get between 40% and 60% of a book sale. Many also indicated that the retailer also gets a large proportion, with some saying this proportion is in line with the share that the publisher gets. All groups were unanimous in their perception that authors get a relatively small share of a book sale in relation to the publisher, with some estimates of 5% to 25%, and perceive this as being "not enough" and that it can sometimes take

years before an author is fairly paid for a book. In some groups, participants said that this small proportion is scaled back even further for online sales. In some groups, participants discussed the price of discounted books. Older books are perceived as being discounted because they did not sell well and the retailer is clearing space.

2.7 VIEWS ON THE FUTURE OF the BOOK INDUSTRY

Some focus group participants said that the book industry itself may have to change the way it does business, given technology changes and concerns about unauthorized access of e-books. Some participants expressed concern that authors do not have other means of revenue aside from book sales the way that musicians have revenue streams in addition to music purchases. Others noted that new models for paying music artists do not generate much income for artists. It was suggested that the book industry should expect to see a growth in need for marketers and increasing pressure on authors to sell their books.

Some feel there needs to be better access to books in order for people to buy them, rather than to feel the need to obtain them for free. "It's a social good" to make information available, and a participant suggested that publishers need to be less restrictive in how people use books and which books are available (e.g., more reasonable pricing on books where possible). This should be paired with messages about the need to pay for books and how this supports the health of the industry. One participant said, "If you price things so that there isn't an incentive to 'borrow', then the problem's solved"; in other words, find a market-based solution to the problem.

3. SUMMARY

FURTHER ON MARKETING AND COMMUNICATIONS

› Readers expressed appreciation for the value of a symbol that would identify Canadian sources more easily. Since Canadians do not seem to see 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.

› In terms of books in the education sector, respondents see pricing to make Canadian books competitive, as well as possible guidelines in place regarding the use of Canadian sources as key to increasing promotion of Canadian books in the classroom.

› 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 (a la Netflix) has some traction on the commercial side among those who read in digital format (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.

› 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.

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 and most 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 a great variety of reading material. They also see a wide variety of socio-cultural benefits to the community and the majority sees libraries as having helped them to learn about authors.

ACCESSING FREE E-BOOKS

> Though more than one in three Canadians have 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.

> Digital rights management is not a widely understood concept. However, most who do understand the concept are aware that it protects publishers and authors from piracy, but some feel DRM has negative implications for readers.

UNAUTHORIZED DOWNLOADING

> 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.

> 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 achieved by aiming messaging at youth in particular.

ROLE OF 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.

- 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 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 should be designed to raise public awareness and appreciation for Canadian books but should also take the opportunity to highlight the role and efforts of publishers on a number of fronts.

- 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.

- Many Canadians know that self-publishing is a route that authors can take to get their books published. Those who are aware of self-publishing think that not using a publisher reduces 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 against 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%).