



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

REPORT ON USAGE AND VALUE

Submitted to:

The Book Strategy Group
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TABLE OF CONTENTS

Acknowledgements	1
1. Introduction	2
1.1 Study Background and Objectives.....	2
2. Methodology	3
2.1 Survey Methodology	3
2.2 Survey Sample Characteristics.....	4
2.3 Focus Group Methodology	8
3. Findings	9
3.1 Current Status of Reading Books.....	9
3.2 Value of Reading.....	22
3.3 Book Purchasing	26
3.4 Relative Value of Reading.....	32
3.5 Importance of Reading Canadian.....	38
4. Summary	47

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Study Products:

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

- ◇ Marketing, Library usage, illegal downloading and publishing
- ◇ Appendix Material: Consultation Instruments
- ◇ 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.

2. METHODOLOGY

2.1 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 keep 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 Probit 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.

2.2 SURVEY SAMPLE CHARACTERISTICS

The following sections provide details on the distribution of each 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 2.1: 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 sample (23 to 26 per cent) has at most a high school education.

Table 2.2: 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 2.3: 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%

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

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 2.4: Proportion of sample with children under 18 living at home

	March Survey (n=1568)	October Survey (n=1590)
<i>Children under 18 living at home</i>		
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 2.5: Provincial/territorial distribution of sample

	March Survey (n=1568)	October Survey (n=1590)
<i>Province/Territory</i>		
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 cities². 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 2.6: Urban/Rural distribution of sample

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

c) Internet and Social Media Use

Most Canadians in the 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 Canadians 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 2.7: 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%

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.

More than half of respondents in the 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 2.8: Frequency of social media use and sites used

<i>How frequently do you use social media? (n=1368)</i>	
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%
<i>Which of the following do you use, if any? (n=1002)</i>	
Facebook	90%
LinkedIn	42%
Twitter	34%
Pinterest	21%
Tumblr	5%
Other	6%

2.3 FOCUS GROUP METHODOLOGY

Focus groups involving the general public were conducted in four Canadian cities (Ottawa, Halifax, Winnipeg, and Calgary). Participants were recruited using the EKOS *Probit* panel. A recruitment screener was developed to identify book readers (see Appendix B). Groups were stratified to ensure a balance of men and women and representation of a variety of adult age cohorts. A focus group guide (provided in Appendix C) was developed by EKOS in consultation with the client. Based on the experience of the first group in Ottawa, refinements to the guide were implemented.

Groups were held in hotel meeting room facilities in the respective cities. Refreshments were provided and participants were provided \$70 for their attendance. Audio recordings and researchers' notes and observations from the focus groups formed the basis for analysis and reporting of results.

3. FINDINGS

3.1 CURRENT STATUS OF READING BOOKS

a) Amount of Time Spent Reading

Four in five Canadians (80 per cent) read books on a regular basis (i.e., in the last three months). The incidence is higher among women than it is among men, as well as among younger Canadians. It is marginally lower in Quebec and Atlantic Canada. This is about the same proportion as found in a 2005 readership study³ by the Department of Canadian Heritage (PCH) which found that nearly 87 per cent Canadians have read at least one book for pleasure in the 12 months preceding the study and a national study on reading in Canada conducted by EKOS Research in 1991⁴, documenting a 20+ year trend in reading among Canadians. A study citing⁵ data from the 2010 General Social Survey found that 76 per cent of Canadians (over age 15) read books as a leisure activity. Overall, book readership may be trending upwards over the past several decades. A 1978 Statistics Canada data set⁶ notes that over a 12 month period, 63 per cent of Canadians reported reading a book.

By comparison, a similar proportion (87 per cent) read online (e.g., websites/blogs), although there is no gender or language gap. Again, it is Canadians under 35 who are most apt to read online. Almost as many Canadians who read books have read newspapers in a three month period (76 per cent), although older Canadians (55 or older) and those whose first language is neither English nor French are more likely to have done so. Fewer read magazines (62 per cent), although the proportion is still high. Again, it is the oldest Canadians (55 or older) who are most apt to read magazines.

³ Canadian Heritage. *Reading and Buying Books for Pleasure. 2005 National Survey*. March 2005.

⁴ Communications Canada, *Reading in Canada*, 1991

⁵ Hill Strategies. *Provincial Profiles of Arts, Culture and Heritage Activities in 2010*. March 2012.

⁶ Statistics Canada. *Survey of Leisure Time Activities*. 1978. (through odesi online)

Table 3.1: Proportion of English Canadians who read (last 3 months) by key demographics

	Books	Magazines	Newspapers	Websites/Blogs
Overall	80%	62%	76%	87%
Gender				
Men	75%	64%	77%	87%
Women	85%	60%	76%	86%
Age				
<35	84%	54%	72%	94%
35-54	77%	62%	71%	86%
55+	81%	69%	86%	82%
First language				
English	80%	62%	75%	87%
French	72%	60%	74%	84%
Other	79%	62%	80%	84%

The 80 per cent of Canadians who read books read an average of just over five hours per week (5.6)⁷. This is slightly higher than a 2005 readership study⁸ by PCH which found the average time spent reading is four and a half hours per week, or measured in 1991 in the Reading in Canada study where it was 4.4 hours (measured on the basis of reading in the previous week). Readers of websites and blogs described even more weekly reading (8.6 hours on average), whereas the three in four Canadians who read newspapers spend 4.4 hours per week doing so. Among the six in ten who read magazines, they spend fairly little time doing so (1.9 hours per week on average). Reading newspapers and magazines seems to also have been stable over the last 20+ years given that *Reading in Canada* measured these at 3.6 hours reading newspapers in the previous week and 2.1 hours reading magazines in the same timeframe. Statistics Canada's 2010 General Social Survey results⁹ indicated that those who participated in reading books, magazines and newspapers did so for 10 hours per week (1 hour, 26 minutes per day), compared with the combined 11.9 hours measured in the current survey.

⁷ This measurement was taken in March for the period of December through February. When asked again in October for the period of August and September the weekly average rose to 7.8 hours per week, presumably reflecting increased reading during summer vacation periods.

⁸ Department of Canadian Heritage, *Reading and Buying Books for Pleasure. 2005 National Survey*. March 2005.

⁹ Statistics Canada. *Table 1.1: Average time spent per day on various activities, for the population and participants aged 15 and over, by sex*. General Social Survey 2010.

Table 3.2: Average number of hours spent weekly reading by key demographics

	Books	Magazines	Newspapers	Websites/Blogs
Overall	5.6	1.9	4.4	8.6
Gender				
Men	6.4	1.9	4.6	9.7
Women	7.8	1.9	4.1	7.5
Age				
<35	6.6	1.3	3.0	10.3
35-54	6.6	1.8	3.5	7.9
55+	8.3	2.2	6.0	7.5
Children at home				
Yes	6.0	1.7	3.1	7.3
No	7.7	1.9	4.8	9.2
First language				
English	7.2	1.9	4.4	8.6
French	5.6	3.6	3.2	10.5
Other	6.9	1.5	4.1	8.1

- Among those who read books, women are not only more likely to read, they also spend more time reading each week.
- Weekly reading time is also higher among readers 55 or older (and related to this, individuals who do not have children at home). This is consistent with the 2005 PCH readership study which noted that older people (55 years old and older) read a higher than average number of books, and with 2010 Statistics Canada findings¹⁰ that individuals age 65 to 74 were 1.4 times more likely than the Canadian average to read at least one book per month.
- The average time logged reading websites and blogs is higher among men, those under age 35, people without children at home, and Francophones. It is also higher among residents of Ontario, although this is partially driven by the younger age of Ontario respondents in the sample.
- Canadians age 55 and older spend significantly more time reading newspapers, and, consequently, so do people without children at home.
- Canadians age 55 and older and people with incomes between \$80,000 and \$120,000 spend more time, on average, reading magazines than other Canadians.
- Heavy book readers spend a lot of time reading other types of materials. They are among those who spend the most time reading newspapers and websites/blogs.

¹⁰ Statistics Canada. *Consumption of culture by older Canadians on the Internet*. January 2013.

- Those who do not read books at all also spend more time reading websites and blogs than do moderate or light book readers.
- The amount of time spent reading magazines and newspapers is correlated.

Most focus group respondents described themselves as active readers, typically spending at least some portion of their week reading books. Illustrating the wide variety of readers and reading intensity that exists, participants indicated that they spend anywhere from two to 30 hours in a week reading books, saying that factors such as vacations or phase of life (taking classes, new parent, retirement) can influence the amount of time they spend reading.

One in seven Canadians (15 per cent) said that they had accessed an audiobook in the past three months. The incidence is higher among those who spend a significant amount of time reading books (as well as websites and blogs), and those who read e-books.

- Lower income Canadians (less than \$40,000 a year) are more likely to have accessed an audiobook in the past three months than those with higher household incomes.
- Rural Canadians are less likely than Canadians in urban areas to have accessed an audiobook in the past three months.

b) Proportion of Leisure Time Spent Reading Books

Respondents were asked to report the proportion of their leisure time that they spend reading books. On average, nearly one-quarter of Canadians' leisure time (23 per cent) is spent reading books¹¹. Women spend a higher proportion of their leisure time on reading books (27 per cent) compared with men (19 per cent). Reading time as a proportion of leisure time is otherwise surprisingly consistent across different segments of Canadians (e.g. by age, income, and geography). People who read magazines and newspapers spend marginally less of their leisure time reading books.

¹¹ There is no way to account for multi-tasking. This percentage may be lower as a portion of all leisure activities (compared with leisure time).

Table 3.3: Proportion of leisure time spent reading books, by key demographics (n=1,262)

	Proportion of Leisure Time Spent Reading Books (Average)
Overall	23%
Gender	
Men	19%
Women	27%

The majority of Canadians say the time they have spent reading for leisure has not changed in the past year. One in four Canadians (25 per cent) say they are now spending more time reading books for leisure, while nearly the same proportion (23 per cent) is spending less time doing so. Women are more likely than men to have increased their time spent reading for leisure. On the other hand, younger Canadians (under age 35) are more likely than older Canadians to have decreased their time spent reading for leisure, as are parents.

Table 3.4: Change in amount of time reading for leisure (past year) by key demographics

	Time spent reading for leisure	
	Decreased	Increased
Overall	23%	26%
Gender		
Men	23%	22%
Women	24%	30%
Age		
<35	35%	29%
35-54	23%	25%
55+	15%	15%
Income		
<\$40k	25%	33%
\$40-80k	21%	25%
\$80-120k	25%	21%
\$120k+	23%	23%
First Language		
English	23%	26%
French	28%	25%
Other	30%	29%

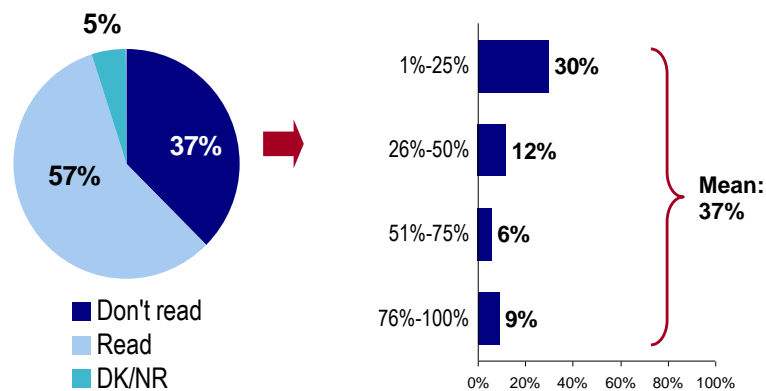
- Residents of major cities are much more likely than those in smaller cities and rural areas to have increased their time spent reading for leisure in the past year.

c) Proportion of Time Spent Reading for School and Work

The majority of Canadians spend some time reading for school and/or work, including reading fiction or non-fiction books, in print or electronic format. Fifty-eight per cent of Canadians spend some time reading for school or work, spending an average of 37 per cent of all of their reading time on school and/or work related reading. Most of these people spend less than half of their total reading time on school and/or work related reading. In 1991 *Reading in Canada* found that 23 per cent of reading was done for work or education, suggesting an increase over the past two decades.

Reading for Work or School

“Approximately, what proportion of your reading time do you spend reading for school or work (as opposed to reading for leisure), including reading fiction or non-fiction books, in print or electronic format?”



EKOS Research Associates Inc.

n=1262

ACP Survey, 2014

- The proportion of men who read for work or school is higher than it is among women. The ratio of work or school-related reading compared with leisure reading, however, is the same between men and women.
- Not surprisingly, people age 55 and older are less apt to be reading for school or work whereas those under 35 are the most apt to do so. The proportion of reading time spent on work/school related reading (among those who do so) is about the same across age

segments. Residents of rural areas, who also tend to be older, report a lower incidence of reading for work or education as well.

- Work/education related reading increases with household income. Again, the proportion of reading time is about the same across income segments.
- People whose first language is neither English nor French are marginally more apt to read for work or school and also report a higher proportion of their total reading time spent reading for work/school.

Table 3.5: Proportion of reading time spent for school or work by key demographics (n=1,262)

	Incidence of Reading for Work/School (%)	Proportion of Reading Time Spent Reading for Work and/or School (%)
Overall	58%	37%
Gender		
Men	62%	39%
Women	54%	35%
Age		
<35	73%	41%
35-54	65%	34%
55+	35%	35%
Household Income		
<\$40k	44%	39%
\$40-80k	47%	36%
\$80-120k	63%	34%
\$120k+	73%	39%
First language		
English	57%	35%
French	67%	41%
Other	68%	49%

The majority of Canadians say the time they have spent reading for leisure and reading for school and/or work has not changed in the past year. One in three (31 per cent) is spending more time reading for school or work in the past year, while 17 per cent are spending less time doing so. A 2013 Environics study¹² reported that six in ten (62 per cent) Canadians are reading for pleasure. Twenty per cent are reading more, while 12 per cent read less. Only five per cent indicate they do not read for pleasure.

- Younger Canadians (under age 35) are more likely than older Canadians to have increased the amount of time they spend reading for work or school. (People in Ontario are more likely

¹² Environics Research Group. *National Reading Campaign. Pleasure Reading Survey*. October 2013.

than those in other provinces to have increased the amount of time they spend reading for school or work in the past year, partly because of a younger Ontario sample in the survey.)

- Canadians with lower incomes (under \$40,000) are more likely to have decreased the amount of time they spend reading for work or school.
- People whose first language is neither English nor French are more likely to have increased the amount of time spent reading for work or school, compared to native English and French speakers.

Table 3.6: Change in amount of reading for work/school (past year) by key demographics

	Time spent reading for work/school	
	Decreased	Increased
Overall	17%	31%
Gender		
Men	13%	30%
Women	21%	32%
Age		
<35	22%	42%
35-54	13%	24%
55+	20%	27%
Income		
<\$40k	36%	27%
\$40-80k	19%	38%
\$80-120k	14%	30%
\$120k+	10%	26%
First Language		
English	18%	28%
French	9%	42%
Other	17%	48%

d) Reading Fiction

When asked what proportion of their reading time is devoted to fiction, one-third of Canadians say most of their reading time is spent on fiction (i.e., 75 per cent or more of their reading), and only one in ten say that they read any fiction at all. The average proportion of overall reading devoted to fiction is reported to be 59 per cent.

- More women read fiction than men (90 versus 80 per cent), and they also report a higher proportion of their reading is devoted to fiction (63 versus 54 per cent).

- Readers who devote the least amount of time on a weekly basis (i.e., fewer than five hours per week) are also least apt to read fiction.
- Older Canadians (55 or older) report that a higher concentration of their reading time is spent reading fiction (63 per cent). Those reporting moderate household incomes (i.e., \$40,000 to \$80,000) also report the most time reading fiction relative to other income cohorts.
- The incidence of reading fiction is lowest among residents of Alberta (78 per cent). Manitoba and Saskatchewan residents devote more of their reading time to fiction (65 per cent of their reading time is spent on fiction).

Table 3.7: Incidence and Proportion of reading devoted to fiction, by key demographics (n=1262)

	Incidence of reading fiction	Proportion of reading devoted to fiction
Overall	86%	60%
Gender		
Men	80%	54%
Women	90%	63%
Age		
<35	86%	55%
35-54	85%	59%
55+	86%	63%
Income		
<\$40k	81%	54%
\$40-80k	86%	63%
\$80-120k	87%	59%
\$120k+	86%	59%
Region		
BC/Territories	87%	59%
Alberta	78%	61%
Saskatchewan & Manitoba	83%	65%
Ontario	88%	58%
Quebec	87%	61%
Atlantic Provinces	86%	59%

e) Proportion of Time Spent Reading Digital Books

Half of Canadian readers (48 per cent) spend some of their reading time reading books in a digital format (e-books). On average, e-book readers spend about half of their reading time reading e-books (48 per cent). One in five Canadians (19 per cent) spends the majority of their reading time on e-books, including 13 per cent who read e-books almost exclusively.

- Canadians age 55 and older are somewhat less likely to read e-books. Older Canadians who read digitally spend about half of their time reading e-books rather than paper copy books, which is in line with the national average.
- Lower income Canadians (those with household incomes under \$40,000) are also less apt to read e-books compared with more affluent Canadians. They report spending less of their reading time with e-books (41 per cent).

Table 3.8: Proportion of reading time spent reading e-books, by key demographics (n=1,262)

	Incidence of Reading Electronic Books	Proportion of reading time spent reading digital books
Overall	48%	48%
Age		
<35	50%	47%
35-54	50%	48%
55+	42%	49%
Income		
<\$40k	34%	41%
\$40-80k	47%	48%
\$80-120k	50%	49%
\$120k+	55%	50%

- Greater proportions of time spent reading e-books are associated with social media use, incidence of accessing free e-books, and moderate to heavy levels of book reading (i.e. more than five hours per week).
- People who do not read magazines spend a much greater proportion of their reading time reading e-books (33 per cent of their reading time) compared to those who do read magazines (19 per cent).
- People who access libraries spend a smaller proportion of their reading time on e-books (21 per cent) compared to those who do not use libraries (27 per cent).

E-book reading continues to grow in Canada. Half of Canadians (48 per cent) say they have spent more time reading e-books in the past year. One in three (35 per cent) is spending about the same amount of time reading e-books, while just 14 per cent say this has decreased for them in the past year.

This trend is consistent with a 2013 Environics¹³ study for the National Reading Campaign which measured electronic publication usage: 45 per cent of respondents indicate they have increased the amount of electronic publications read in the past year, while a similar amount (47 per cent) indicate they have not changed their e-reading habits in the past year,

- Younger Canadians (under age 35) are more likely than older Canadians to have increased their time spent reading e-books. On the other hand, people with children at home are more likely than those without to have decreased the amount of time spent reading for leisure and their time spent reading e-books.

Table 3.9: Change in e-reading habits (past year) by key demographics

	Time spent reading e-books	
	Decreased	Increased
Overall	14%	48%
Gender		
Men	14%	46%
Women	14%	50%
Age		
<35	14%	60%
35-54	17%	47%
55+	10%	41%
Income		
<\$40k	15%	52%
\$40-80k	18%	43%
\$80-120k	11%	49%
\$120k+	12%	48%
Children at home		
Yes	22%	49%
No	10%	49%
First Language		
English	14%	46%
French	19%	47%
Other	12%	56%

¹³ Environics Research Group. *Pleasure Reading Survey*. October 2013.

Almost all focus group participants had read at least one digital book; however, most said they prefer physical books. A few have “switched back” from e-readers to physical books. Those who prefer physical books to digital ones say they “love to hold a real book”, “love the smell of books” and the general tangibility of books. A few note that print books help them to unwind at night; digital books can be harder on the eyes and stimulate them to stay awake. Those who prefer physical books also note that they do not have to worry about battery life.

The most frequently mentioned benefit of digital books is the ease of use and decreased weight of material when travelling. Some are dedicated digital readers, who are now “used to it” and will only purchase and read a digital version of a book even if it is already available to them in hard copy. A few noted the convenience and immediacy of buying digital books. The ability to search for certain words, highlight text, or use the e-dictionary are noted as benefits to digital reading for some.

A few who primarily read digital books noted that they continue to buy physical books for their children as they feel it is important for children to develop a relationship with a physical book. A few indicate that the artwork/illustrations in children’s books are an important part of the experience, and that there are no technological barriers to reading physical books.

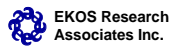
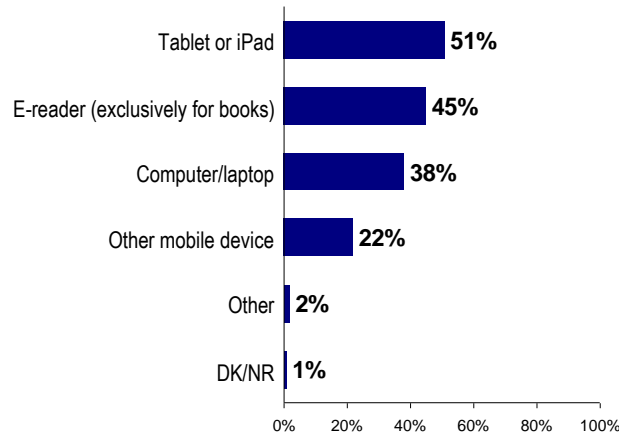
A few said that the price of digital books seem too high relative to physical books (most notably compared to paperback books). Some feel that print books have greater value in terms of price and the perceived longevity of a book; they “demand more respect” than digital books. A few indicated that there are some compatibility barriers to buying e-books on certain e-readers.

f) Method of Accessing Digital Books

The majority of Canadians access digital books on more than one device. One in two Canadians who read e-books (51 per cent) accesses them on a tablet, such as an iPad. Almost as many (45 per cent) access their e-books on an e-reader used exclusively for books, and four in ten (38 per cent) access them on a desktop computer or laptop. About half as many (22 per cent) accesses their e-books on another mobile device, such as a smartphone. Although 58 per cent of those using a device said that they only use one of these, one in four (27 per cent) said that they use two different types of devices (often using a computer and tablet). One in six (15 per cent) uses three or four types of devices.

Methods of Reading E-Books

“How do you access electronic print books in digital format?”



n=570

ACP Survey, 2014

- An e-reader is a choice more often made by women (54 per cent), seniors (58 per cent) and those who read the most (i.e., more than 10 hours per week) (62 per cent), compared with their counterparts.
- Computers or laptops are more often selected as the method for reading digital books among men (47 per cent) and readers under 35 years of age (52 per cent).
- A tablet is most often a choice made by more affluent readers (59 to 63 per cent of those digital readers reporting household incomes of \$80,000 or greater). Those with less income are more apt to use a computer or laptop (52 per cent).

Table 3.10: Devices used to access books in digital format (e-books) (n=570)

	Multi function tablet	E-reader	Computer/laptop	Other mobile device
Overall	51%	45%	38%	22%
Gender				
Men	54%	40%	47%	23%
Women	49%	50%	31%	21%
Age				
<35	44%	37%	52%	31%
35-54	56%	44%	33%	26%
55+	53%	58%	31%	9%

	Multi function tablet	E-reader	Computer/laptop	Other mobile device
Overall	51%	45%	38%	22%
Income				
<\$40k	32%	30%	52%	31%
\$40-80k	41%	47%	34%	19%
\$80-120k	59%	46%	35%	14%
\$120k+	63%	55%	39%	26%

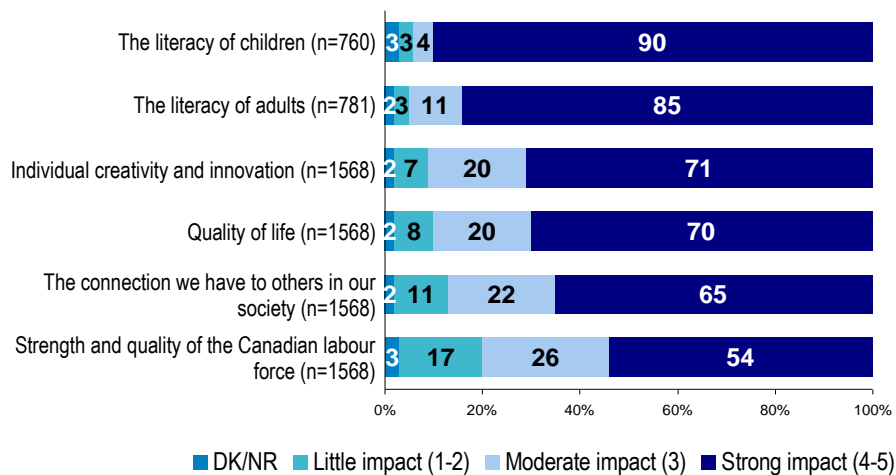
3.2 VALUE OF READING

a) Social Impacts of Reading

Canadians feel that reading books impacts society positively in a number of ways. Perhaps most obviously, Canadians say that the impact of reading has a strong impact on the literacy of both children and adults (according to 90 per cent and 85 per cent, respectively). Seven in ten feel reading has a positive impact on quality of life (70 per cent) and on individual creativity and innovation (71 per cent). Similarly, 65 per cent of Canadians feel that reading books strengthens our connections with others. Although a slightly more tenuous connection for some, just over half of Canadians (54 per cent) also see reading as strengthening the Canadian labour force by improving qualifications for jobs.

Social Impacts of Reading

“In your own view, how much of an impact does reading books have on each of the following?”



- Women are more likely than men to see many of the benefits of book reading, including literacy of adults, quality of life, social connection, and strengthening the labour market.
- Older Canadians (55+) are more likely to see the benefits of reading on the Canadian workforce and on quality of life. Younger Canadians (under 35) are more likely to see the benefits to children's literacy, while those between 35 and 64 are more likely to feel that reading books benefits individual creativity and innovation.
- High income Canadians (\$120,000+) are more likely to see the benefit to quality of life.
- People with children are more likely to see the benefit to adult and child literacy and to creativity and innovation.
- Native English speakers are more likely to see the benefit to creativity and innovation and adult literacy, while those whose first language was not English are more likely to see the benefit to social connection.
- Readers of various publication types (books, but also newspapers, magazines, websites) are more likely than non-readers to see many of these as benefits of reading. Medium to heavy book readers and buyers, library users, and people who read for school/work are also more likely to see these benefits.

Focus group participants observed that the impact of reading books on Canadian society is "huge". Reading helps to keep us informed, stimulates the mind, and expands vocabulary. Reading helps a person concentrate on complex ideas and broadens perspective. One said that reading "can help both weaken and strengthen biases". One noted that "you need imagination to read"; for example, often people enjoy a book more than the movie version of a book because of all the feeling, imagination and interpretation that is involved in reading.

Those with grandchildren noted the satisfaction with reading to them, as it is an engaging activity to sit down with a child and is a conduit to relationships. A few indicated that everyone needs to find what reading means to them, but everyone will find something and it starts with building a love of reading in children. As one articulated, "Teachers tell kids in grade school that 'You read to become intelligent, to become better writers and conversationalists and to be a better citizen'."

b) Personal Reasons for Reading

When asked what their main reasons are for reading, two in five Canadians (40 per cent) say they read for pleasure, enjoyment, fun, or entertainment. Informal learning and information gathering is the reason why almost one in three read (31 per cent). Another one in five people say they read as a way to relax (20 per cent). Four per cent read for other reasons, including mental stimulation and creativity. (Although most Canadians see reading as having an impact on creativity and innovation, few seem to read for this purpose). Similarly, only one in three of those who read for work or school say that they are reading primarily for information or knowledge. (More than half said they read mainly for enjoyment and/or relaxation/escape.)

“I have always enjoyed reading. It is a way to broaden the imagination and escape reality for a little while.”

“I have always enjoyed reading and the main reason why I read is for educational purposes (not related to my school/course work). I enjoy learning about new topics and I find that books are a great way to increase both the breadth and depth of my knowledge.”

“I love the immersive nature of fantasy novels! It offers an escape from the stress of life. I enjoy imagining the characters and I love the smell of a new book!”

“I read because it is a physically relaxing yet mentally very stimulating activity (sometimes too much!). Escapism is a huge part of why I love reading, and learning more about a given topic is a close second. I read to rest, to learn and to temporarily be in a different world.”

“I use reading to increase my knowledge of the people and places around me, as well as to ‘exercise my imagination’ through reading fictional novels.”

“It is good for my mind and imagination, and my mental health! Reading is very useful, it can be a retreat, or a way to practice and focus attention, not to mention a way to learn about virtually any topic. I also get attached to certain authors, and like to see what they will come up with next.”

- As seen previously in the percentage who read for work or school, more men than women say they read for information, learning, and knowledge. Women are more likely than men to read for relaxation, leisure, and escape.
- People over age 55, Anglophones, and people with incomes between \$80,000 and \$120,000 are more likely to say they read for pleasure or enjoyment. People with incomes between \$40,000 and \$80,000 and Allophones are more likely to read for education or learning.

Relaxation and escape is more often a reason given by people with incomes greater than \$120,000.

- Canadians in large cities are more likely to read for education and learning.
- Light readers, library users and people who read for school or work are more likely to read for learning or education, whereas heavy readers, non-library users and people without school or work reading are more often read for pleasure or enjoyment.

Almost all focus group participants indicated that book reading is a valuable part of their life. Some cited the learning experience of reading, and that reading helps to broaden the mind or can help relieve stress. They value reading for a variety of reasons including building knowledge, entertainment, and escapism. Many enjoy reading books for the ability to connect to others and being exposed to different ideas or new worlds. Many indicated that they enjoy reading more than other entertainment activities and almost always have a book with them. Participants said that:

“Reading enriches your life.”

“There’s no more valuable way to spend your time than reading a book.”

“It’s like a time machine.”

“A book helps to feel more connected with the human experience”.

“A book is like yoga for the mind.”

“I can’t go to sleep without reading.”

“If you stop reading, you stop learning.”

Books can also be exciting and part of a social experience, such as the anticipation of the release of new books or discussing books at book clubs. A few further pointed to the social experience of discussing books with others, communicating knowledge, and interaction as a result of a book.

Many feel that more people should be readers. A few people observed that reading seems to be on the decline with the “dumbing down” of society. A few feel that children are reading less, with a few pointing to the amount of activities kids are involved in detracting from reading time. A few, however, challenged this by saying that reading in children may be the same or that overall, readership may be increasing as there are more book clubs, more books read as a result of movies. One noted that popular books, such as Harry Potter, entice children to read more. Trends towards improving literacy rates may also be increasing readership.

Some indicated that they would say to the broader public that reading “opens your world and takes you places”. About half indicated, however, that you “can’t preach to someone to read, you either do or you don’t. It’s hard to entice people to read if they aren’t interested.”

The social and personal value of books extends beyond reading for pleasure. A report on the Arts and Individual Well-Being in Canada explored the link between various cultural activities and eight social indicators. According to the report, “book readers have a 28 per cent greater likelihood of reporting very good or excellent health than non-readers, even accounting for other factors. Book readers are 74 per cent more likely than non-readers to have volunteered in the past year, even after controlling for other factors. In a model of satisfaction with life, book readers have a 15 per cent greater likelihood of reporting very strong satisfaction with life than non-readers”.

3.3 BOOK PURCHASING

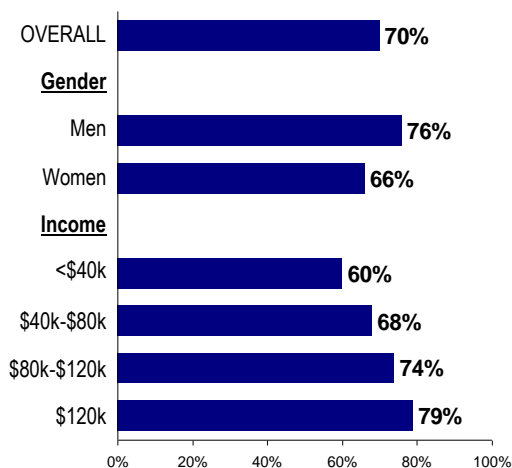
a) Ownership of Books

According to the survey, Canadians typically own 70 per cent of the books they read. Almost none say that they borrow exclusively (i.e., only six per cent say they borrow most¹⁴ of the books they read). Over a third (36 per cent), however, say that they only borrow a few of the books they read or they do not borrow books at all. Light readers (reading five hours or less per week) are more apt to own rather than borrow their books.

¹⁴ “A few to none” is defined as 5 per cent or fewer of the books they read; “most/all” is defined as 95 per cent or more of the books they read.

Proportion of Books Canadian Read That They Own

“What is the proportion of books Canadian read that they own?”



 EKOS Research
Associates Inc.

n=1262

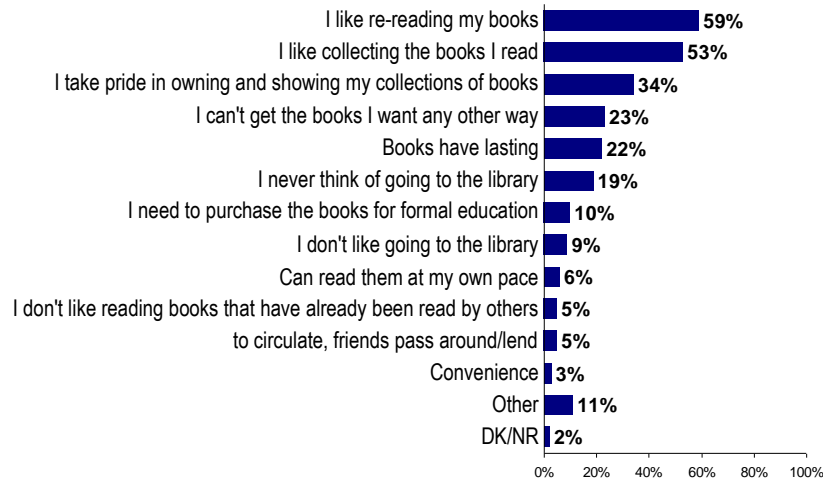
ACP Survey, 2014

- Demographically, four in ten men say that they own all or most of their books (compared with 31 per cent of women), and men generally report a larger percentage of their books that are owned (75 per cent), compared with women who report owning 64 per cent of their books on average.
- The propensity to own books increases with household income. More than four in ten Canadians with household incomes of \$80,000 or higher own all or most of their books (reporting an average ownership of about 77 per cent or more of the books they read). Among lower income Canadians (reporting household incomes of \$40,000 or less) only one in four own all or most of their books and the average ownership level is 58 per cent of the books they read.
- Parents have less of a tendency to own high proportions of the books they read.
- The propensity to own books does not differ significantly with age.
- Anglophones in Quebec report the highest tendency to own the books they read (78 per cent on average). Residents of BC and the Territories have less of a tendency than others across the country to own the books they read (on average, 65 per cent).

Canadians who own more than half of the books they read say they prefer to own rather than borrow for a variety of reasons. The top reasons, for the majority of Canadians, are that they like re-reading books (59 per cent) and they like to collect the books they read (53 per cent). Similarly, 34 per cent take pride in owning and showing collections of books. Over one-quarter say they do not think to or do not like to go to the library (28 per cent), cannot get some of the books they want without buying them (23 per cent), or like to own books because of their lasting (and sometimes increasing) value (22 per cent). Some need to purchase their books for their education (10 per cent). A few like to circulate books to friends, prefer to read books at their own pace/timeframe, or do not like reading books that have been read by others (six per cent or fewer in each case).

Reasons for Owning Books

“Why do you prefer to own printed or digital books rather than borrow them (i.e., what is the main benefit for you personally) ?”



EKOS Research
Associates Inc.

n=919

ACP Survey, 2014

- Readers who spend many hours reading per week (i.e., 10 or more) are more likely to say that they prefer to own books because they like re-reading their books. Those who spend a lot on books are also more likely to say they like collecting their books and take pride in ownership. Canadians who read e-books are not as likely to say that they own (and collect) books because books have lasting value, compared with readers who only read hard copy books, who are more apt to own and collect books, seeing them as having lasting value.
- Younger Canadians (under 35) are more likely than those over 35 to say that they like collecting books and/or take pride in ownership, or say they need to own books for formal education.

- The least affluent (i.e., reporting household incomes under \$40,000) are the most likely to say they like collecting books, take pride in ownership, do not like going to the library, and need to own books for school. Canadians reporting household incomes over \$120,000 stand out in their greater propensity to not consider libraries.

While some focus group participants primarily borrow books, such as from the library or friends/family, most participants indicated that they prefer to purchase a book, most notably when they are familiar with the author or generally perceive that it will be a good book. Some simply prefer new books; for example, “I like new fresh books that have been untouched.” Some like to collect books to add to their personal library to read more than once (although a few indicate that they never get around to re-reading) or lend to others. Those who purchase physical books indicated that they are not sensitive to the price of books, prefer new rather than used books, or like to take their time reading a book (rather than worry about having to return it).

b) Spending on Books

In the current survey, respondents were first asked about spending in the previous 60 days, and 38 per cent said that they had not spent any money to purchase books. This seems largely in line with the 32 per cent measured in 1991 in *Reading in Canada* (saying that they had not purchased books in the previous three months). Respondents were subsequently asked about spending in the last 12 months. The majority of Canadians (81 per cent) spend at least some money on the purchase of books on an annual basis; a similar finding to the 2005 PCH National Survey where eighty-one per cent of all respondents in the sample stated that they bought one or more books (new or used) over the last 12 months. Those least apt to spend on books (i.e., in the past 12 months) are seniors and those with the least income, as well as rural residents. Those who read for work or school are most apt to say that they have spent on books in the past year. The average annual expenditure among the 81 per cent who spend on books is \$313, although this increases with household income, and is higher among those who read for school or work, the heaviest readers (i.e., reading more than 10 hours per week), and/or those who also read newspapers. It is lowest among rural residents and in Atlantic Canada.

Extrapolating this annual spending to all members of the general public, including the 19 per cent who do not spend on books in a 12 month period, the average expenditure is \$253.53.

Table 3.11: Incidence and amount of annual spending on books by key segments

	Incidence of Spending	Average Annual Expenditure
Total (n=1262)	81%	\$313
<i>e-book reader</i>		
Yes	83%	\$338
No	81%	\$281
<i>Read for school/work</i>		
Yes	86%	\$353
No	75%	\$250
<i>Library user</i>		
Yes	80%	\$330
No	83%	\$283
<i>Income</i>		
Less than \$40,000	76%	\$221
\$40,000 to \$80,000	80%	\$262
\$80,000 to \$120,000	86%	\$376
\$120,000 or more	88%	\$347
<i>Urban/Rural</i>		
Large Urban Centre	80%	\$326
Other Urban	84%	\$315
Rural	74%	\$270

A Hill Strategies Research report¹⁵, based on Statistics Canada's Survey of Household Spending, found that Canadian consumer book spending (excluding school books) in 2008 amounted to \$1.403 billion. Nearly one-half of households purchased books in that year with an average of \$226 spent on books for those households. While this average amount is notably lower (likely due to the six year difference and/or sampling method), the socioeconomic and geographic patterns hold true as the propensity to buy books increases with education, income, and city population.

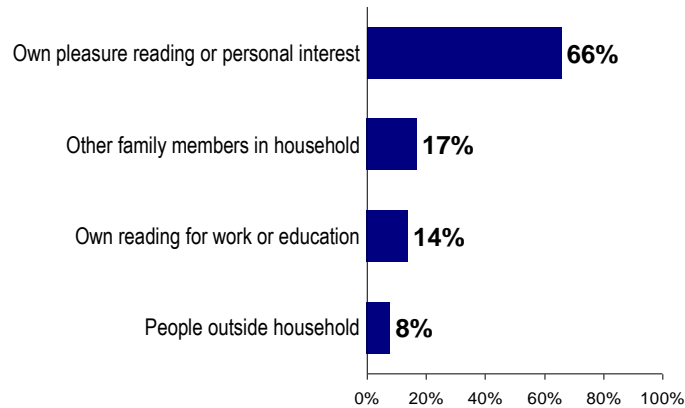
Some focus group participants indicated that their spending on books lately has increased, due to factors such as the convenience and accessibility of books for purchase (buying online, the destination experience of book stores), the perceived lack of other quality entertainment, or an increase in the unit cost of books. Others indicated that their spending is decreasing, due to a change in practice to borrowing books, or to the cost of books decreasing through price discounts at large physical or online retailers.

¹⁵ Hill Strategies Research Inc. *Who buys books and magazines in Canada?* March 16, 2011.

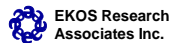
The large majority of spending on books is devoted to books for personal reading (66 per cent). The remaining third is split roughly equally between reading for education or work, and purchases for other family members, with a small portion of the spending share dedicated to people outside the home.

Spending on Books for Personal Reasons

“What is the proportion of Canadian’s spending on books for personal reading, work/school, or others?”



Base: Spent money on books in the past 12 months



n=1005

ACP Survey, 2014

People with children living at home spend a significantly smaller proportion of their book spending for their own reading (53 per cent, versus 71 per cent for people without children at home) and spend a greater proportion on books for other family members in the household (29 per cent, compared to 11 per cent for people without children at home).

Some focus group participants said that books are a much better value than other entertainment such as, for example, movies, because, “Books last longer” and “a book can change you more than a movie”. Compared to sports and concerts, most feel that a book holds their attention longer and costs less. A few mentioned that they judge the value of what they spend their money on by the impact, rather than just the time spent; and felt that books have a strong impact on an individual.

Most feel that books are generally a great value and are reasonably priced. A few indicated that a book has added value because you can experience it repeatedly, share or pass them to other people, and this makes books “priceless”. Many feel that the pricing of a book can be variable; \$40 can be a lot for one book but sensible for another. A few noted shopping experiences such as “getting 4 books for \$50” or “\$78 for 11 books” as reasonably priced given the value of the book. A few indicated that children’s books seem less reasonably priced.

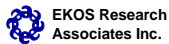
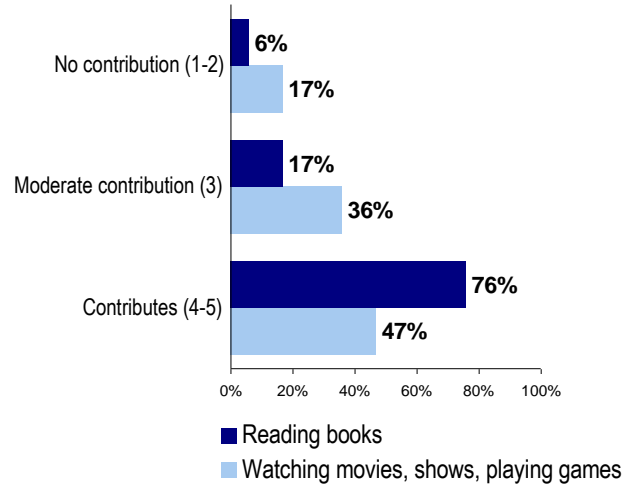
3.4 RELATIVE VALUE OF READING

In order to place the amount and value of reading into a comparative context, survey respondents were asked about their hours spent watching something on a screen (e.g., television, movie, computer games, YouTube, etc.). Compared with the 80 per cent who read on a regular basis (i.e., in the previous two months), 95 per cent said that they watch something on a screen, excluding reading e-books. The average time spent in screen-based activities is 17.8 hours: more than double the hours spent reading books. Time spent on screen-based activities is higher among men and younger age cohorts, but decreases with age, as well as with higher household income.

When asked about the contribution that reading books and screen-based activities make to their quality of life, respondents are much more likely to rate reading books as having a strong contribution (76 per cent rated it a four or five out of five). By comparison, fewer than half (47 per cent) rated screen-based watching of movies, shows and playing games as making a strong contribution to quality of life.

Reading & Screen Time – Quality of Life

“How much of a contribution does reading books/watching movies, shows, or playing games for leisure make to your quality of life?”



n=1263 (those who read)

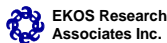
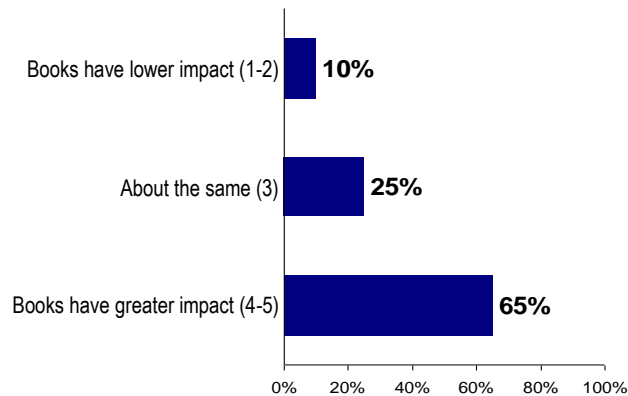
Book Strategy, Wave 2, 2014

- As with incidence and amount of reading, women are much more likely to rate reading books as making a strong contribution to quality of life (83 per cent compared with 68 per cent among men, who are more likely than women to rate screen-based activities strongly, although even among men, only 13 per cent rate screen-based activity as making a strong contribution).
- Naturally, the contribution made by reading books increases as reading intensity increases (i.e., those who spend more hours reading are more apt to give it a strong rating in their lives). Similarly, those who read in digital format (who are often those who read more in hours) and those who spend more on books provide stronger ratings of the role that reading books plays in their lives.

Given the greater tendency to see reading books as having a strong impact on quality of life compared with the contribution made by screen-based activities, it is not surprising that two in three (65 per cent) readers say that the comparative impact from reading books is greater than the impact from the watching movies or shows, and gaming. Another one in four see these activities as having equal value in their lives, but only one in ten sees the value of watching or playing something on a screen as having a larger contribution to quality of life.

Relative Impact – Reading vs. Screen Time

“Compared with watching movies, shows, or playing games for leisure, how would you rate the impact of reading books for leisure on your quality of life?”



n=1263 (those who read)

Book Strategy, Wave 2, 2014

- Following a similar pattern as that presented earlier, women, parents, and individuals over 35 are more apt to rate the value of reading books as higher than the contribution made by screen-based activities.
- Those under 35, residents of the largest cities, and those who read for school are more apt to see reading books and screen-based activities as having equal contributions to their quality of life.

a) Relative Spending – Reading vs. Screen Time

In spite of the relative contribution of reading books in determining quality of life, respondents indicated that they spend about three times as much money on screen-based activities as they do for books. Just under eight in ten spent something on books (77 per cent) in any given year, and a slightly higher proportion (82 per cent) spent on screen-based activities in that same timeframe. The average expenditure is reported to be \$329 per person (which includes buying for themselves and others in the household, as well as for gifts), which is on par with the figure reported in the first survey (\$313). Comparatively, 82 per cent of respondents indicated that they spend an average of \$933 in a year, including the cost of tickets, subscription fees, and utilities to support regular screen-based activities. Pro-rating these figures to the full population, \$253.33 is spent on books, while \$765.06 is spent on screen-based activities.

Table 3.12: Relative spending on reading and screen-based watching

	Approximately how much money did you personally spend to purchase books, for leisure reading, including print and electronic format, in the past 12 months for yourself or for others?		Approximately how much money did you personally spend in the past 12 months for yourself or for others, for leisure activities that involved watching or playing something on a screen?	
	Spending (%)	\$ (Mean)	Spending (%)	\$ (Mean)
Overall	77%	329	82%	933
Gender				
Men	74%	325	85%	1,020
Women	80%	331	77%	845
Age				
<35	78%	362	90%	936
35-54	76%	351	84%	964
55+	77%	282	73%	905
Income				
<\$40,000	69%	320	74%	806
\$40,000-\$80,000	76%	294	80%	1,061
\$80,000-\$120,000	85%	291	86%	855
\$120,000+	79%	443	88%	1,060
Region				
BC-Territories	78%	383	82%	749
Alberta	76%	349	83%	1,469
Sask/Man	74%	301	80%	1,022
Ontario	78%	322	82%	845
Quebec	74%	307	69%	935
Atlantic Provinces	67%	259	79%	937

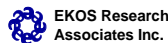
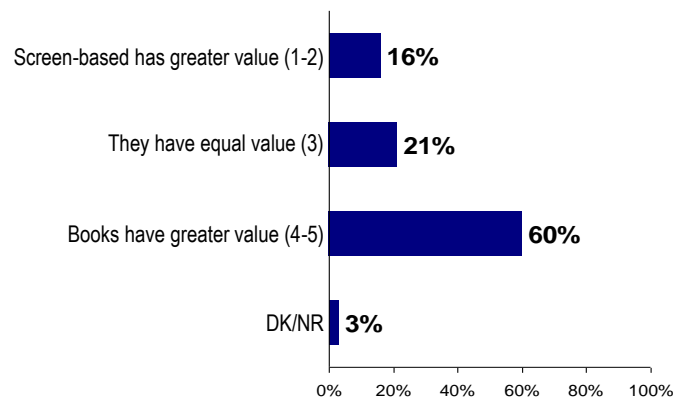
	Approximately how much money did you personally spend to purchase books, for leisure reading, including print and electronic format, in the past 12 months for yourself or for others?		Approximately how much money did you personally spend in the past 12 months for yourself or for others, for leisure activities that involved watching or playing something on a screen?	
	Spending (%)	\$ (Mean)	Spending (%)	\$ (Mean)
Urban/Rural				
Major cities	76%	331	84%	901
Smaller urban centres	77%	344	81%	969
Rural	74%	267	76%	891
Reading Purpose				
Pleasure	84%	332	83%	837
Work	87%	372	87%	831
School	84%	511	87%	1,094
E-Book Reader				
Yes	86%	375	88%	988
No	82%	318	77%	810

- Expenditure on books is relatively even among men and women, and age groups under 55, although spending drops off after 55. There is a considerable increase in spending in the most affluent households. Across the country, spending is highest among residents in BC and lowest among those in Atlantic Canada, as well as in rural areas generally.
- Those who read in digital format spend more, which is likely related to the fact that they are also more intense readers (i.e., those who read more hours per week). There is a sharp increase in spending for books among those who read for school, clearly substantiating the information provided by post-secondary education (PSE) students in the focus groups and key informants in the interviews.
- Spending for screen-based activities highlights different patterns, showing higher expenditures made by men, residents of the Prairies, and those in different income cohorts. It is only those who read for school that report the highest spending for both books and screen-based activities.

In terms of value for money, taking into consideration the level of spending and the contribution to quality of life, books are clearly seen by the majority of Canadians as having the greater value for money. Six in ten are of this view, while one in five (21 per cent) rate them equally. Only 16 per cent believe that the value for money for screen-based activities is greater.

Relative Spending – Reading vs. Screen Time

“In terms of value for money, how do you compare the amount of money you spend for paper copy and e-books for leisure reading, with the amount you spend to watch or play something on a screen (e.g., movies, shows, or gaming) for leisure?”



n=1263 (those who read)

Book Strategy, Wave 2, 2014

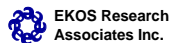
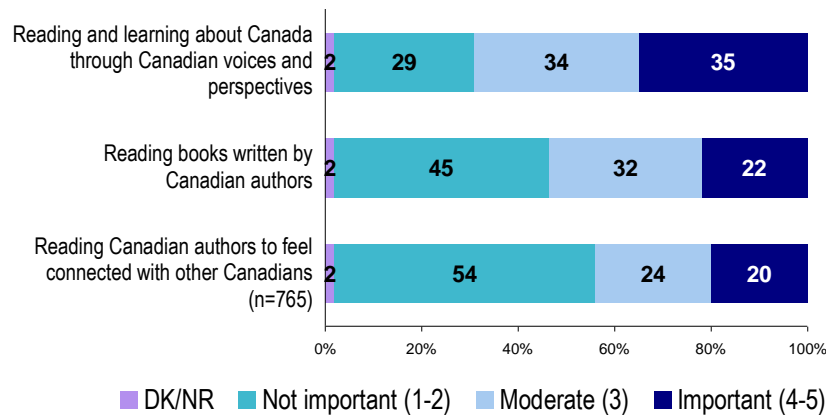
- Following the pattern already described, women are more apt to see the value of books as higher. Those over 55 are also the most positive about books while those under 35 are the most likely to see the value of screen-based activities as stronger (22 per cent versus only 12 to 14 per cent of those over 35).
- The views of BC residents are the strongest regarding the positive value of books (69 per cent rating books as having the greater value). This is also a pattern found among those reading for pleasure (62 per cent), whereas those reading for school are the most likely to rate screen-based activities as having the better value (23 per cent versus 14 to 15 per cent of other readers).
- Naturally, more intense readers are the most positive about the relative value for money of books; however, this also is the pattern found among those who spend the most on books. For example, three in four of those spending the highest amounts on books say that books have the greatest value.

3.5 IMPORTANCE OF READING CANADIAN

The survey explored the importance of reading Canadian literature along three separate dimensions. Overall, results suggest that Canadians place comparatively little importance on reading of Canadian works, in spite of the overall value they place on reading books. Some respondents indicated in open comments, and in focus groups that they are interested in quality, irrespective of country of origin of the books they read. One-third of Canadians (35 per cent) place a high level of importance on reading and learning about Canada through Canadian voices and perspectives, although three in ten (29 per cent) do not see this as a particularly important goal. Just one in five (22 per cent) consider reading books written by Canadian authors to be an important activity (compared to 45 per cent who say it is not important) and a similar proportion (20 per cent) feels that reading the works of Canadian authors to achieve a sense of connection with other Canadians is a worthy endeavour (versus 54 per cent).

Perceived Importance of Canadian

“How important are each of the following?”



n=1590

Book Strategy, Wave 2, 2014

- Men are consistently more likely to assign a low level of importance to reading Canadian. For example, 54 per cent say reading books written by Canadian authors is of little importance, compared to 36 per cent of women.
- Not surprisingly, those who read books regularly place comparatively more importance on Canadian literature than non-readers. For instance, 24 per cent of readers say reading books by Canadian authors is highly important, compared to 14 per cent of non-readers.

Most focus group participants have read books by Canadian authors. Most seek out or notice if books are by Canadian authors, while some noted that they “don’t read a book because it’s Canadian, [they] read it because it’s good.” Some indicate that it is of no importance to them to read Canadian books. Some say they will “at least give it a look”, but the subject would supersede the nationality of the author. As one noted, “It is a nice plus if afterwards I notice the author is Canadian.” A few indicate that they “feel a bit of guilt” that they don’t read more Canadian-authored books.

Participants who read non-fiction noted that the history, political, and regional interest books they read are typically Canadian. Some indicated that they prefer Canadian fiction because it “speaks to me more” or noted certain genres, such as science fiction, that have good Canadian authors. A few feel it is essential to read and support Canadian authors. Those who read Canadian books say there are “some very good books”, both fiction and non-fiction. As articulated by one participant, “no one is short changed” by reading only Canadian authors.

Some participants make a point of reading Canadian authors because they like having the national and regional connection to an author, like to support local writers and local presses, and feel a responsibility to know what is being talked about nationally. A few indicated that the advantage of Canadian authored books is that readers get a fresh take on familiar places or learn about places they knew nothing about.

Some indicate that Canadian authors should do more publicity to promote their work. Some learn about Canadian authors through CBC and *Canada Reads*, and other avenues highlighting Canadian authors. In retail stores, a few noted there is a Canadian symbol in sections around Canadian authors. Awards like the Giller Prize entice a few participants to seek out Canadian authors. As indicated by one participant, “I wouldn’t go look for books by Canadian authors, but hearing people talk about it makes me interested.” A few will occasionally feel intrigued by a particular Canadian author and seek out their work.

Some participants feel that there is not enough diversity in Canadian literature. A few noted that there needs to be more literature available outside the mainstream, including other cultures, ethnicities, regions, and diversity of voices and experiences. A couple of respondents indicated that Canadian literature is too myopic and Ontario-centric. A few note that this direction of Canadian literature may be due in part to government priorities and subsequent funding support. For example, fostering a strong Canadian identity can be at the expense of richness and diversity of Canadian authors.

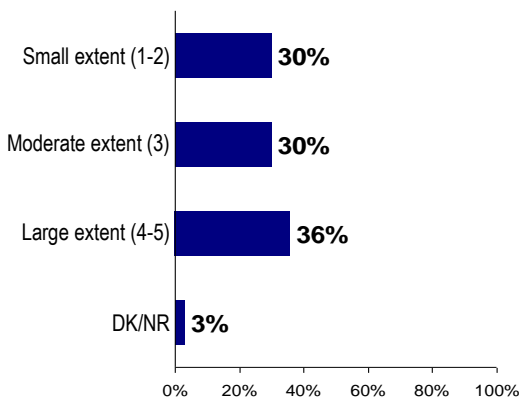
Some participants said “of course” it is important to get books in front of Children early, but not necessary to be by Canadian authors. A few participants in the PSE focus groups indicated that they did not enjoy the Canadian books they were required to read in K-12, as they were “too bleak”, and as a result, do not look favourably on Canadian literature.

a) Perceived Need for Public Campaign

Canadians are divided on the need for a public awareness campaign to promote Canadian authors. One-third (36 per cent) believe there is a great need for this type of campaign while a similar proportion (30 per cent) feels that such a campaign would be largely unnecessary and another three in ten (30 per cent) are in the middle on the need for a public awareness campaign.

Perceived Need for Public Campaign

“To what extent is there a need for a public awareness campaign that emphasizes the benefits of Canadians reading books by Canadian authors?”



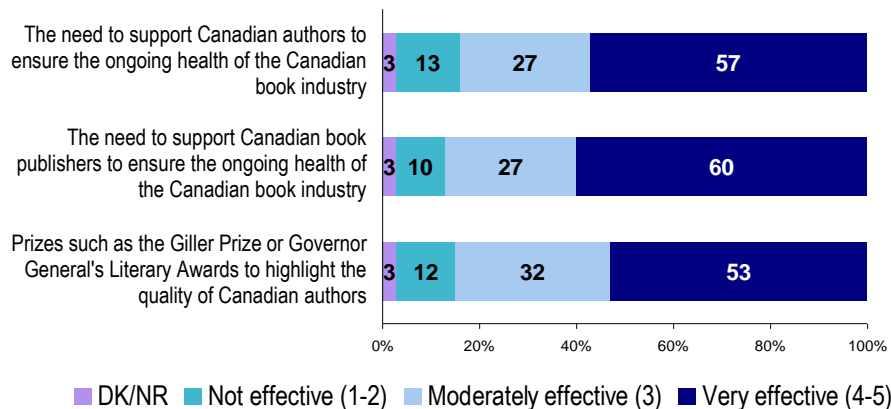
- Women are comparatively more supportive of a public campaign (44 per cent say large extent, compared to 28 per cent of men).
- The perceived importance of a public campaign declines with income (from 49 per cent among respondents with an annual household income of less than \$40,000 to 22 per cent among those earning \$120,000 or more).
- Not surprisingly, those who read books on a regular basis are more supportive of this campaign.

b) Methods of Emphasizing Value of Canadian Books

Those respondents who feel that there is at least some need for a public awareness campaign were presented with three strategies for highlighting the value of reading Canadian books and asked about the effectiveness of each one. All three options were widely met with optimism. Just under six in ten (57 per cent) say a message reminding Canadians of the need to support Canadian authors would be highly effective, and a similar proportion (60 per cent) believe that stressing the need to support Canadian publishers would resonate well. Half of Canadians (53 per cent) feel that awarding prizes to highlight the quality of Canadian authors would be an effective strategy.

Methods of Emphasizing Value of Canadian

“How effective would each of the following be in highlighting the value of Canadians reading Canadian books?”



- Women are consistently more positive, more often rating these messages as highly effective.
- Readers are more likely to believe in the effectiveness of these strategies. For example, 64 per cent say that focusing on the need to support Canadian authors would be effective; in comparison 43 per cent of non-readers say it would be ineffective.

c) Perception of Quality of Canadian Books and Industry

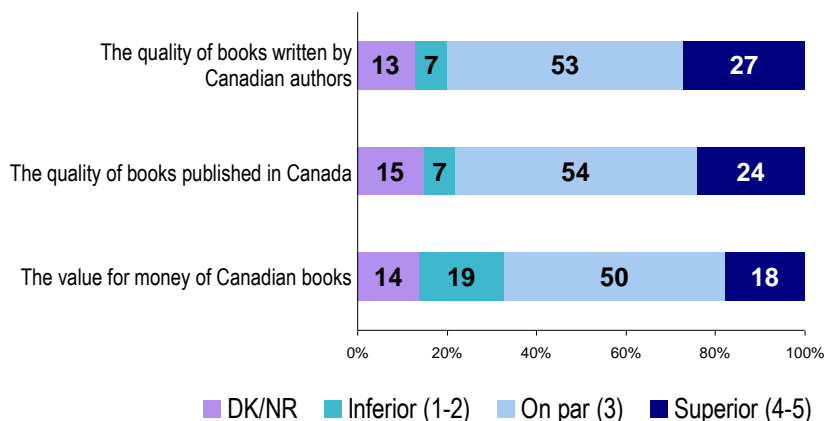
It seems clear that Canadians see the quality of Canadian books as being at least on par, if not marginally higher quality, than other books written and produced around the world. Half of respondents to the survey (53 to 54 per cent) rated books written by Canadian authors or books published in Canada as having equal quality of other books¹⁶. One in four (24 to 27 per cent) rated Canadian authors or Canadian published books as higher quality. Very few view Canadian authors and books as inferior in quality, although 13 to 15 per cent said that they were unsure. It is useful in any communication strategy to know that Canadians do not respond differently in terms of reacting to the quality of Canadian books, irrespective of whether messaging talks about Canadian authors or Canadian published books.

In terms of relative value for money, Canadian books are seen as being on par with other books, according to 50 per cent of respondents. In this case, however, there is a slightly stronger contingent (19 per cent) of the view that the value of Canadian books is marginally inferior to that of other books; rivalling the proportion that believes Canadian books has superior value. This may be driven by the separate Canadian and United States book prices listed on most books on the shelves of books stores.

¹⁶ Respondents were randomly assigned to one of two sub-samples and given the question asking about books written by Canadian authors or the question asking about books published in Canada. Half of respondents were also assigned the question about value for money (and half were not asked this question).

Perception of Quality of Canadian Books & Industry

“How would you rate...?”



n=760; half sample

Book Strategy, Wave 2, 2014

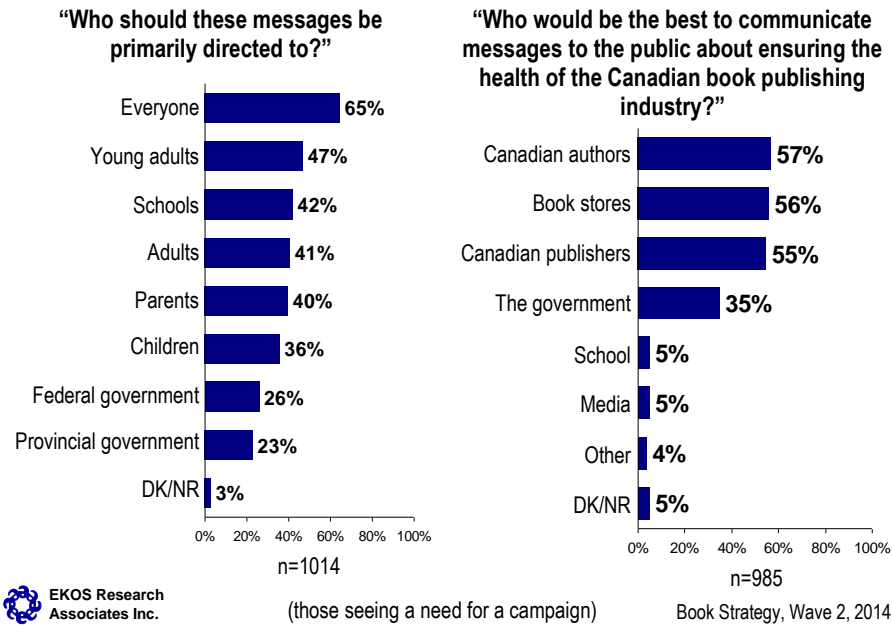
- There are very few noticeable differences in the views expressed by various segments of the population regarding perceived quality and even value for money of Canadian books. Women are marginally more positive than men regarding value for money, as are those reporting the least income, possibly because they spend the least.

d) Campaign Targeting and Voice

Respondents rating one or more of the tested strategies as at least moderately effective were presented with a list of potential audiences for this campaign and asked to select the ones to which the campaign message should primarily be directed. Results reveal broad support for simply directing the campaign to everyone (65 per cent). Just under half (47 per cent) believe these messages should be directed to young adults, while four in ten believe the target audience should be schools (42 per cent), adults (41 per cent), parents (40 per cent), or children (36 per cent). Just one-quarter feel these campaigns should focus on the federal government (26 per cent) or provincial governments (23 per cent).

Respondents were also asked who would be best positioned to deliver these messages and Canadian authors (57 per cent), book stores (56 per cent), and Canadian publishers (55 per cent) are widely believed to be the most effective messengers. Optimism regarding the government's ability to communicate these messages is much more tepid, with just one in three respondents (35 per cent) identifying the government as the best messenger.

Campaign Targeting and Voice



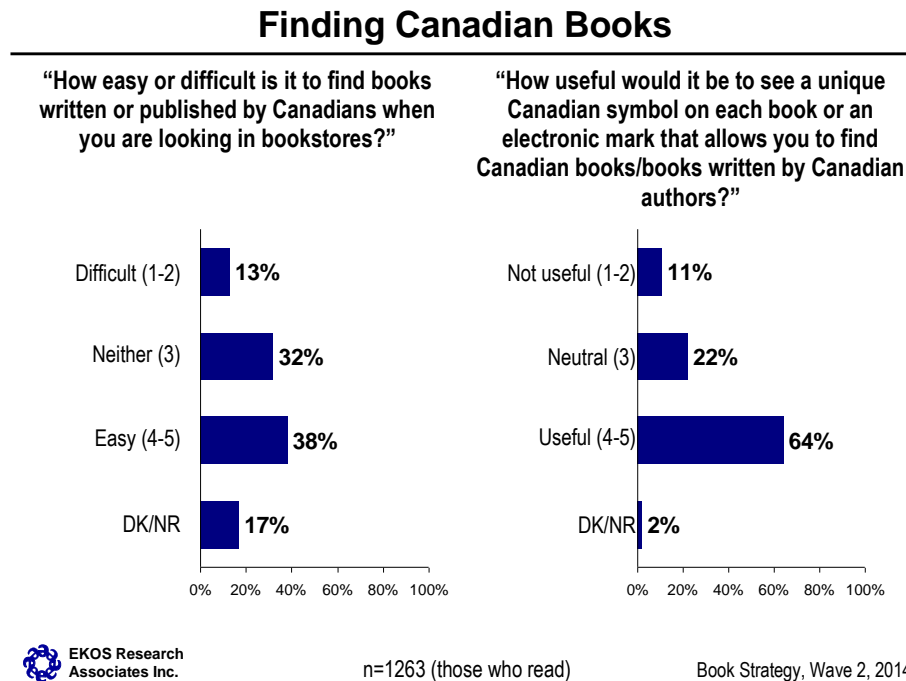
- Women are more likely to favour a broad campaign that addresses everyone (73 per cent, compared to 54 per cent of men). Women are also more likely to say that book stores are best positioned to deliver this message (62 per cent versus 47 per cent).
- Younger Canadians (i.e., those under 35) are somewhat more likely to support targeting young adults and children.

When asked to describe in their own words what they feel would be effective in highlighting the value of Canadians reading Canadian books responses largely fell into the following four thematic areas, illustrated with some key examples of individual responses.

What would be effective in highlighting the value of Canadians reading Canadian books?	
Themes	Illustrative Quotes
Integration into the school/education system to engage children and youth (school-based initiatives, children/youth exposed at an early age to develop interest)	<p>Start children young, target Canadian authors in school.</p> <p>Promoting Canadian authors in elementary school, mandatory books written by Canadian authors.</p> <p>Having Canadian authored books as part of required reading in schools and post-secondary institutions.</p> <p>Canadian children will be growing in all areas of expertise and knowledge for Canada thus becoming stronger Canadians in all aspects.</p>
Increased publicity/promotion/advertising campaigns of Canadian content (general and specific mentions in media)	<p>Print ads in subways and bus shelters for Canadian books.</p> <p>Events such as Word on the Street and others, which give profile to the authors. I believe that interaction between authors and readers is very effective.</p> <p>Radio, television and newspaper interviews with authors.</p> <p>A public awareness campaign, using various media that emphasizes the contribution to cultural vibrancy that results from a healthy Canadian publishing industry.</p> <p>A campaign to outline the variety of genres and works out there, especially works that everyday people can relate to</p> <p>Canadian talk shows need to be promoting Canadian authors.</p>
Greater emphasis on the connection/value to Canadian identity and perspectives (culture, history, values, diversity...)	<p>It reinforces Canadian values and perspective in an international world.</p> <p>Promoting a sense of Canadian pride and in turn supporting one of our own, so to speak.</p> <p>Keeping Canadians in tune with their culture.</p> <p>Highlight uniqueness of being Canadian, i.e., sense of humour, interesting stories, history, nature.</p> <p>Learning about cultural and national identity issues. Absorbing Canadian history.</p>
Increased promotion of the quality of Canadian books / Remaining competitive	<p>That the content is just as relevant and competitive with foreign books.</p> <p>History of Canadian literature.</p> <p>Feels that a lot of Canadian authors are too far to the left or right, so it would be effective to highlight Canadian books that aren't like that.</p> <p>The quality of the books themselves.</p> <p>How world class Canadian authors are.</p> <p>Content that is equally entertaining as American authors.</p>

e) Finding Canadian Books

Although relatively few readers said that they have difficulty finding Canadian books (13 per cent), the majority of respondents (64 per cent) believes that including a symbol on Canadian works would help readers identify them as Canadian (compared to just 11 per cent who say this would not be useful and just over one in five who are in the middle).



- Residents of British Columbia are somewhat more likely to say that it is easy to find books by Canadian authors at bookstores.
- Women are considerably more positive about the value of symbols and electronic marks used to identify books written by Canadian authors.

4. SUMMARY

CONSUMPTION PATTERNS

- Most Canadians (8 in 10) read books, averaging over five hours per week in reading. Reading books cuts across all demographic and geographic segments of the country. One in four reads for work or school, and all but 10 per cent read for leisure, favouring fiction over non-fiction in a ratio of almost two to one.
- Reading is a key element of Canadians' leisure activity, occupying about a quarter of all leisure time. For about half of Canadians, reading occupies about the same amount of time as it has in the past, although an equal but balanced proportion have experienced an increase or decrease in the amount they read, or the amount they read for work or school specifically.
- Heavy book readers spend a lot of time reading other types of materials. They are among those who spend the most time reading newspapers and websites/blogs.
- About half read in digital format, favouring a pattern of younger readers, although more than four in ten of even the oldest cohort read some e-books. E-readers typically read on a multifunction tablet or e-reader, although many use a computer or laptop. E-books are most notably valued for being easier to travel with and not posing any technological barriers. However, focus groups indicated a strong preference by some for the experience of reading a physical book.
- Focus groups indicated that Canadians read Canadian authors across genres like history, politics, and science fiction, and feel there are many good Canadian books to choose from; however, few deliberately try to read Canadian books, preferring instead to read "good books" that might happen to be Canadian.
- Just over three in four (77 per cent) Canadians purchase books on an annual basis with an average annual expenditure of \$329 (\$253 as an average of all members of the public including those who do not spend on books). This is compared with 82 per cent who spend on screened-based activities including watching shows, videos or movies, as well as gaming; spending three times the amount that they do on books (\$933) in an average month (\$765 across all members of the public including those who do not spend on screen-based activities).

VALUE OF READING

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

BOOK PURCHASING

- Canadians own most of the books they read, mainly because they see the value in being able to re-read their books or because they like to collect them.
- Canadians usually choose to read a book because they are familiar with the author, they are interested in the topic, or because of recommendations from others, usually from friends and family.
- Physical book stores and online book sellers are the most important places for learning about books to read and are the places where most Canadians buy their books. Focus group participants confirmed that browsing bookstores brings a sense of pleasure.
- E-book readers typically purchase books from the major online retailers, but are open to the idea of accessing e-books through online renting/borrowing and through sites where content is made available through paid advertising.
- In terms of the value of reading as a leisure activity in comparison to other pastimes or forms of entertainment, focus group participants mentioned that book reading is good value for money and creates an experience that has a lasting impact.

APPRECIATION FOR CANADIAN BOOKS IN THE COMMERCIAL/ TRADE SECTOR

- The case for Canadian books in the context of leisure reading is less obvious to many Canadians, according to survey results. Learning about Canada through Canadian voices and perspectives holds some resonance but most people feel that 'reading Canadian' is not really all that important. Nor are most people convinced that an awareness campaign is required to address what some perceive to be a non-existent problem. Some responses suggested that most people don't pay much attention to whether authors they read are Canadian or not, and knowing that the author or publisher is Canadian is not important enough to sway their decision about which books to read. Certainly, some respondents indicated that they read Canadian books, but not at the expense of quality (i.e., "I won't read it just because it's Canadian").
- That said, respondents did find arguments about the need to support Canadian authors and the Canadian book industry compelling, understanding that what is not exercised atrophies. They also see prizes for literature as a good way of highlighting the value and quality of Canadian writing. Further, survey results do not suggest that Canadians have any sense of inferiority when it comes to the quality of Canadian books, typically seeing them as at least on par, if not a little better in quality than other books.
- In the case of a campaign designed to elevate public awareness of Canadian books and their value, respondents suggested messaging aimed at the broadest audience, with some additional efforts targeting youth and schools, where young people can be exposed to Canadian books early on. Canadian authors, book publishers and retailers are seen as equally viable voices and perspectives from which to send the message.