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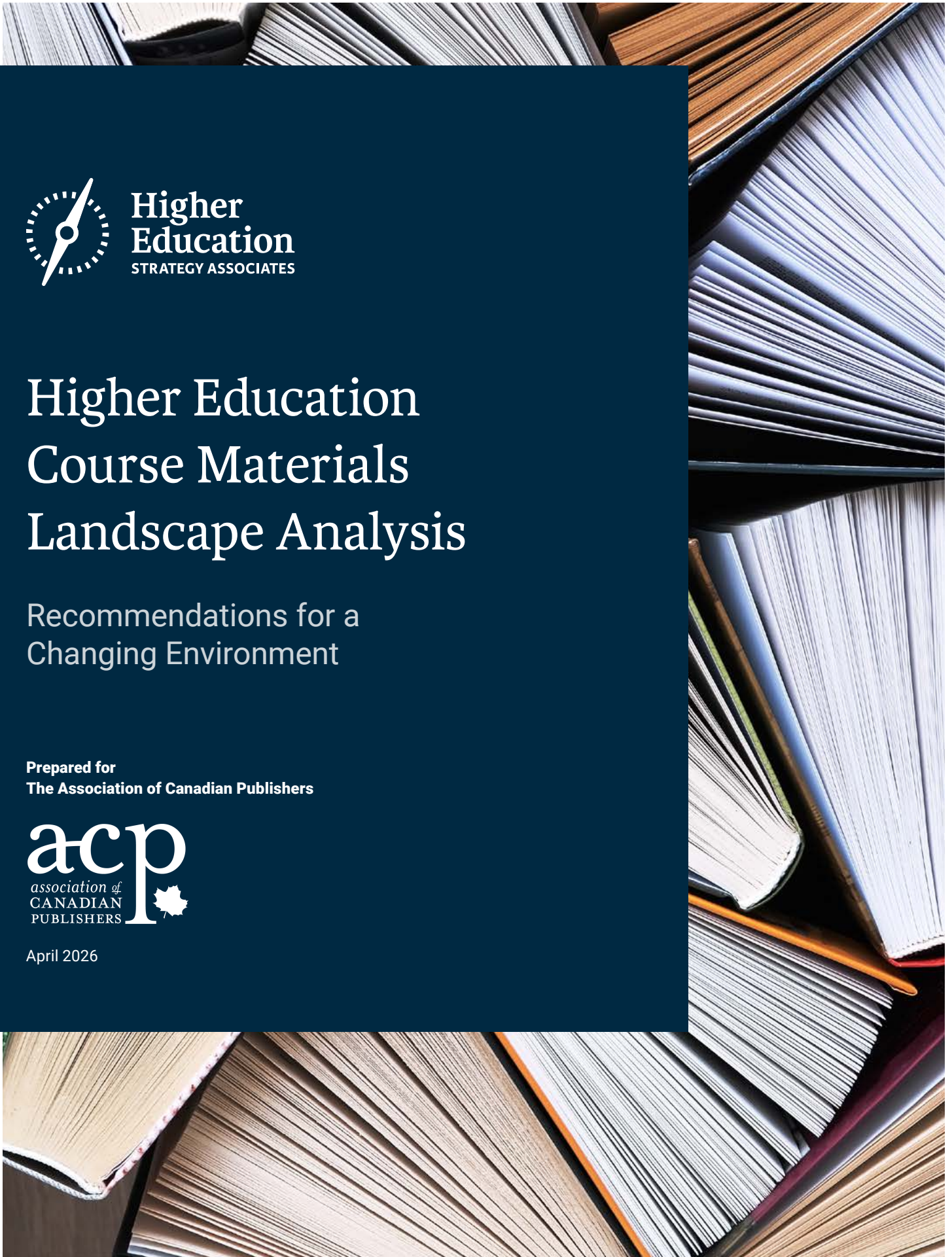
# Higher Education Course Materials Landscape Analysis

Recommendations for a  
Changing Environment

Prepared for  
The Association of Canadian Publishers



April 2026





Higher Education Strategy Associates (HESA) is a Toronto-based firm providing strategic insight and guidance to governments, postsecondary institutions, and agencies through excellence and expertise in policy analysis, monitoring and evaluation, and strategic consulting services. Through these activities, HESA strives to improve the quality, efficacy, and fairness of higher education systems in Canada and worldwide.

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Any errors or omissions are the authors' alone.

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# Executive Summary

This report presents findings and recommendations from a study of how course adoptions and sales interact in the Canadian higher education market, identifying where and why disjunctions occur and how publishers can position themselves amid compounding structural pressures.

Drawing on over 247,000 adoption records from the Brian Murphy Group (BMG), qualitative interviews with faculty, students, librarians, campus store personnel, and copyright officers, and a survey of over 400 students, the study maps the forces reshaping the market for course materials in the humanities and social sciences (HSS).

The findings point to a set of reinforcing structural, economic, technological, and pedagogical pressures that have accumulated over two decades. The most consequential driver is the structural shift away from a single adopted textbook toward instructor-curated collections of readings, OER, and multimedia resources. This is compounded by the growing precarity of the teaching complement, which disrupts the relationship-based sales models on which smaller publishers depend. Enrolment declines in the humanities, the disciplines in which many ACP members are concentrated, are shrinking the addressable market, while rising title fragmentation means that the titles that are adopted are being picked less often. The BMG data show that adoption intensity dropped from 61 adoptions per 1,000 enrolled students in 2021 to 38 by 2024. Canadian publishers hold a relatively steady 19-20% share of HSS adoptions in recent years, but face unique competitive pressures from the scale advantages of US and UK publishers that dominate the remaining 80%.

Our research suggests that price sensitivity operates as a moderating rather than a primary driver of purchasing decisions for students and faculty, particularly in the Arts, Humanities and Social Sciences. According to survey responses, most students still purchase required materials, and interviews suggest that any decision to forgo them is driven more by perceived value in meeting course requirements than by price alone. Trying to push down costs (for example, by offering rental options) is not likely to dramatically increase sales.

Libraries and other institutional purchasers want Canadian content to be available digitally but do not necessarily need complex platforms.

Generative AI is an emerging force. It is possible that AI may partially level the competitive playing field for smaller publishers while also rewarding large-scale investment typically only available to large-scale publishers.

Building on this analysis, Canadian publishers should consider

- Providing faculty with ready-to-use framing to help students understand why the course materials are important
- Looking for opportunities to support communities in which instructors can share ideas
- Redoubling efforts to communicate the value of course materials directly to students and inform librarians about their options
- Develop and regularly update modular content repositories
- Explore the new kinds of accompanying resources that are being made possible by advances in AI
- Favour materials that mirror shifts in pedagogy towards questioning information
- Support well-designed inclusive access programs
- Move away from rental models where they compete with purchasing
- Simplify return policies which can deter bookstores from buying books, and offer generous return policies
- Work to coordinate the digital platforms on which Canadian publications are made available to reduce friction for students.



# 1. Introduction

The higher education course materials segment, which includes books, bundles, homework systems, and instructor resources, has historically been an important market for publishers. Today, however, several interconnected structural pressures are converging to reshape the market in important ways. Some of these forces are immediate; others are slower moving but no less consequential, and yet most if not all overlap. The shifting definition of “affordable,” for instance, cannot be separated from the proliferation of free digital materials or generative artificial intelligence. That the composition of the student body and the accumulation of demand on their time is different from what it was ten years ago impacts how instructors choose to use course materials, up to and including whether they choose them at all.

The Association of Canadian Publishers (ACP) represents over 115 Canadian-owned and controlled book publishers from across the country. As outlined in its public-facing mandate, the ACP exists to support and advocate for its members by fostering a thriving Canadian book publishing industry through policy development, professional development, and information sharing across the book industry and the broader cultural sector. Canadian publishers occupy a distinct segment of the higher education materials market. Unlike the multinational commercial publishers that dominate global course material sales, Canadian-owned presses tend to be smaller, more specialized, and more likely to publish in the humanities and social sciences. Many produce materials that reflect Canadian legal frameworks, cultural realities, and policy contexts, content for which there is no ready substitute from international publishers. These publishers face particular competitive pressures: they lack the scale to invest in the comprehensive digital platforms and supplementary resource suites that larger commercial players use to differentiate their offerings, and they operate in disciplinary markets, particularly the humanities, where enrolments have been declining. Understanding the forces shaping the course materials market is therefore of particular strategic importance to the ACP and its members.

In the context of a changing market and seeking to better understand how changes in the market and in higher education more broadly affect course materials adoptions and usage, the ACP commissioned Higher Education Strategy Associates (HESA) to map sales trends within the Canadian higher education publishing market; investigate how course materials are selected, adopted, and purchased;

identify factors contributing to declining sales and increasing returns; and surface successes, unmet needs, and opportunities. In the process, HESA incorporated an equity lens, accounting for how systemic barriers (e.g., accessibility, affordability, OER access) affect students and precariously employed professors and instructors, and the dissemination of work by equity-deserving creators and scholars.

This report contributes to the ACP’s core mandate of information sharing. By contextualizing market data within the broader shifts of the cultural and educational sectors and supplementing our understanding of buying motivations across the higher education materials adoption chain, this report fulfills a key pillar of the ACP’s mandate: fostering a shared understanding of the industry’s evolution. The following pages offer a portrait of a sector in transition, providing the clarity needed to ensure that Canadian publishers can continue their vital work of supporting Canadian scholarship and pedagogy.

## Overview of Approach

Findings for this report were developed through a mixed-methods design that included quantitative data analysis and qualitative interviews with faculty, students, campus store personnel, librarians, and copyright officers. The research is organized across four phases spanning December 2025 through March 2026.

HESA began with a baseline market analysis drawing on anonymized publisher sales data supplied by ACP members, examined for trends in volumes, pricing, returns, edition cycles, and the shift between physical and digital formats. HESA also analyzed post-secondary adoption data at Canadian institutions compiled by the Brian Murphy Group (BMG) between 2019 and 2025 and analyzed trends in adoptions and enrolments across fields and publisher country of origin<sup>1</sup>. Supplementing the data analysis, we also engaged with participants across the course material purchasing chain so as to understand what influences decisions at each step and to better understand, crucially, what the key drivers of change are in recent years. This included:

- An online survey of 454 students focusing on decision-making rationale<sup>2</sup>. These students were drawn



from a standing panel of Canadians who agree to complete surveys and receive gift cards as completion incentives.

- Ten (10) semi-structured interviews with students, which aimed to understand in more depth not just the changing nature of student purchasing behaviour, but the forces and rationale that influence their decisions.
- Semi-structured interviews with five (5) campus store buyers across four (4) provinces to better understand the pressures of buying, returns, and evolving competition.
- Semi-structured interviews with ten (10) instructors across disciplines, institution types (colleges and universities), and employment status (full-time vs. part-time), employment tenure (2-20+ years), and provinces (ON, AB, BC, and NS) to understand how course material selection criteria are evolving.
- Semi-structured interviews with six (6) librarians in postsecondary institutions exploring changes in course material access, reserve patterns, and institutional copyright practices.

The survey data provides an aggregate overview of how students behave within the adoption chain and the motivation for those behaviours. In addition to the quantitative data, HESA researchers analyzed the data from qualitative interviews to understand narrative threads and patterns across interested parties, paying particular attention to themes and comments that have bearing on how Canadian publishers may evolve in the coming years.

A note on the definition of course materials: Throughout this report, “course materials” refers to resources assigned or recommended by instructors for use in a specific course, including textbooks, digital texts, bundles, homework systems, and instructor-curated course packs. It does not include lab equipment, goggles, uniforms, or other physical supplies that students may be required to purchase for a course. While the qualitative interviews made this distinction clear, some survey respondents may have interpreted the term more broadly. Readers should bear this in mind when reviewing survey data on spending and purchasing behaviour.

## 2. The Canadian Higher Education Course Materials Market

The world of higher education publishing has been under sustained pressure emanating from monumental shifts in technology, teaching and learning practices, and the growth and decline of disciplines across post-secondary institutions that have upended its business model for over two decades.

### 2.1 Historical Context & Evolution

The Canadian higher education publishing market is a complex arena where global commercial players compete with smaller, specialized domestic presses and university-affiliated publishers. Beginning in the mid-2000s, publishers began facing increasingly large and diverse competitive pressures within the higher education course materials market. While resale of older textbook editions always resulted in downward pressure on sales after a new edition's first year, the consolidation of bookstores, from university-owned independents to privately operated continental

chains, created a multi-store used book market that significantly accelerated the erosion of publisher revenues via new physical copies. At the same time, digital publishing began to alter the textbook and course materials market, from how materials were produced, to what distribution mechanisms were needed, to how they were consumed by customers. Although digital adoption in higher education lagged behind the trade publishing sphere, it represented a fundamental shift in buying and selling habits, introducing new complexity to bookstore buyers' choices and enabling the proliferation of direct publisher-to-student sales channels. The shift to digital that introduced direct-to-consumer sales was just



one of the ways the bifurcation between publishers of different sizes accelerated, as the capacity to invest in digital infrastructure became an important competitive advantage.

Subsequent changes in the course materials market have in many ways favoured large commercial players and further required smaller publishers to adapt on their own. Along with digitizing their catalogues, publishers (large commercial ones, mostly) began developing comprehensive suites of instructional and student support resources. Instructional supports were designed to support professors with their teaching, while student supports enhanced learning outcomes.



The implications of these shifts in teaching complement for the course materials market are significant and compounding. Faculty interviewees described a recurring pattern: instructor turnover means that course material decisions are frequently revisited, sometimes abandoned, with each new appointment. When a contract instructor is assigned a course weeks before it begins, the practical result is often a reliance on whatever materials are most immediately accessible, whether that is a large publisher's well-marketed textbook with ready-made supplementary resources, freely available OER, or the previous instructor's materials if they are even available. This churn works against the kind of sustained publisher-instructor relationship that smaller Canadian publishers have historically relied upon. Some publishers have their sales team visit the majority of large universities and colleges in Canada at least once annually, a practice spanning several decades. That kind of long-term relationship building presupposes a stable teaching complement. When instructors cycle through courses on short-term contracts, these relationships are harder to establish and maintain, and publishers with smaller sales forces are disproportionately affected.

Time-poor instructors who often are teaching several courses on short notice require support, which larger publishers have been able to provide. However, supplement-

tal instructor resources that most benefit contract faculty proved expensive and time-consuming to develop, driving publisher input costs upwards. To recoup these investments, publishers required increased adoption and sell-through rates to maintain margins. This dynamic created a structural disadvantage for smaller publishers unable to absorb such investment and forced smaller publishers to compete differently, which we will return to shortly.

These seismic changes have greatly impacted smaller publishers, which have needed to find different ways to carve out space for themselves both as providers of higher education course materials and in other markets. The production of HSS books is relatively stable in Canada, and the production of scholarly books from university presses specifically is increasing. However, the demand for HSS titles has not increased with supply, resulting in the number of units sold per title to decline. At the same time, trends in HSS disciplines show a long-term shift in how knowledge is disseminated. The ratio of journal articles to monographs in the social sciences and humanities has been growing, as scholarship increasingly circulates through article-length publications rather than book-length works. This shift toward shorter-form scholarly output has consequences for course material selection: faculty in HSS fields are increasingly able to construct reading lists from journal articles, book chapters (which nevertheless relies on books being produced in the form of book chapters and the perceived ability to copy parts of texts under fair dealing), and curated digital resources rather than assigning a single textbook. The result is a fragmented demand environment in which the traditional model of the adopted textbook competes with instructor-curated assemblages of materials drawn from multiple sources.

These broader market-level forces operate alongside more localized pressures, including escalating operational costs for post-secondary institutions, changes in program preferences and ideas about the value and purpose of education, a legislative environment focused on immediate open access, and a sociocultural imperative to decolonize and Indigenize the Canadian scholarly record. These drivers, while not directly within the publishing ecosystem, nevertheless exert significant pressure on several actors within the adoption chain.

## 2.2 The Adoption Chain

Higher education publishing occupies a distinct niche within the publishing landscape, and as such, is affected by, and must navigate, vastly different market dynamics. For



instance, trade publishing is largely driven by consumer demand and sales depend, to a certain extent, on capturing a local, cultural, social, or political zeitgeist (as amplified by things like booktok, New York Times Bestseller lists, and book prizes). Higher education publishing sales, and course materials adoption and purchases in particular, are instead governed by interrelated decisions made by several parties along the decision-making chain that are far less susceptible to popular demand.

Demand, in this context, is not a simple metric to observe but rather the product of indirect signals working through institutional, faculty, bookstore, and student decision-makers. Understanding where Canadian publishers can most effectively intervene requires mapping how this chain operates in practice. There is considerable overlap and variation between institutions and professors that influence the adoption chain. Nevertheless, we can identify overall patterns or stages in processes that are common amongst institutions.

The institution, often overlooked, plays a vital role in the adoption chain. Institutions create a portfolio of programs and professors are assigned courses within that portfolio, and these courses are in some ways a function of institutional programming priorities and student demand. These are hardly static—programs are developed and terminated as the world of knowledge and the boundaries of disciplines evolve— and the choices institutions make about programming have downstream effects on course material adoption and purchase. Whether this is a function of a decrease in student demand or the availability of programs drives demand is a question for another research project, but what we can show with available data is that the size of broad areas of undergraduate study in Canada has changed significantly in recent decades, therefore affecting which materials are likely to be in higher demand than others.

Once courses are assigned, the instructor becomes the central decision-maker, but not all instructors operate under the same constraints. Some professors are constrained by institutional policies, limiting their choices or budgetary thresholds for course materials, whereas others have no say in the matter at all, with departmental committees or curriculum designers having made the choice. In instances where professors or instructors are not at liberty to select the materials, these are often fixed and difficult to change. In instances where the professor or instructor is at liberty to make a choice, they are faced with several factors influencing their decision, including price, format, content, student preference, and the value of supplementary resources.

More often, faculty we interviewed over the course of this project shared that they tended to choose textbooks for first-year or lower-level or large multi-section courses, and then opt for more open course, journal articles, online and multi-media course packs or reserves for upper level, elective and graduate courses. This pattern is consistent with the BMG adoption data showing that introductory courses represent the plurality of the adoption market, which is where textbooks have their strongest foothold. It also aligns with a broader pattern noted in recent research on HSS knowledge dissemination: as the ratio of journal articles to monographs in the social sciences and humanities continues to grow, the assembled-syllabus model becomes increasingly viable for upper-division courses where instructors have greater autonomy and where students are expected to engage with primary literature.

Once an instructor has chosen which material(s) to use, they can influence sales by the way they choose to communicate sales and access channels. An instructor may direct students to the campus bookstore, recommend an independent retailer, point students toward online platforms, or, whether explicitly or implicitly, signal that materials can be obtained through alternative means, including piracy.

This communication decision has significant consequences for publishers and campus stores alike, as it determines which sales channels, if any, capture the resulting demand. Following quickly upon the amendment of the Copyright Act in 2012, which among other things added “education” as a purpose for fair dealing, almost the entire higher-education sector outside of Quebec stopped paying to license the copying of copyright-protected works. Without consulting publishers, the institutions developed policy guidelines that claimed the limits that had been allowed under their abandoned collective licences—a single chapter or up to 10% of a work—were now the new limits allowed as fair dealing, without compensation. While this policy was twice judged to be unfair in court, the Supreme Court eventually declined to rule on its fairness, and invited the Government of Canada to clarify the limits of fair dealing for education if it so wished, and that is where the dispute still rests. Publishers and authors regard these practices as substituting for paid licensing, previously in the tens of millions of dollars per year, and most believe they also substitute for sales, since free digital copying allowed by the institutions now competes with paid purchasing. This dynamic is reinforced by institutional practices into which publishers have limited visibility. Instructors commonly share materials via library-catalogue links embedded in the learning manage-



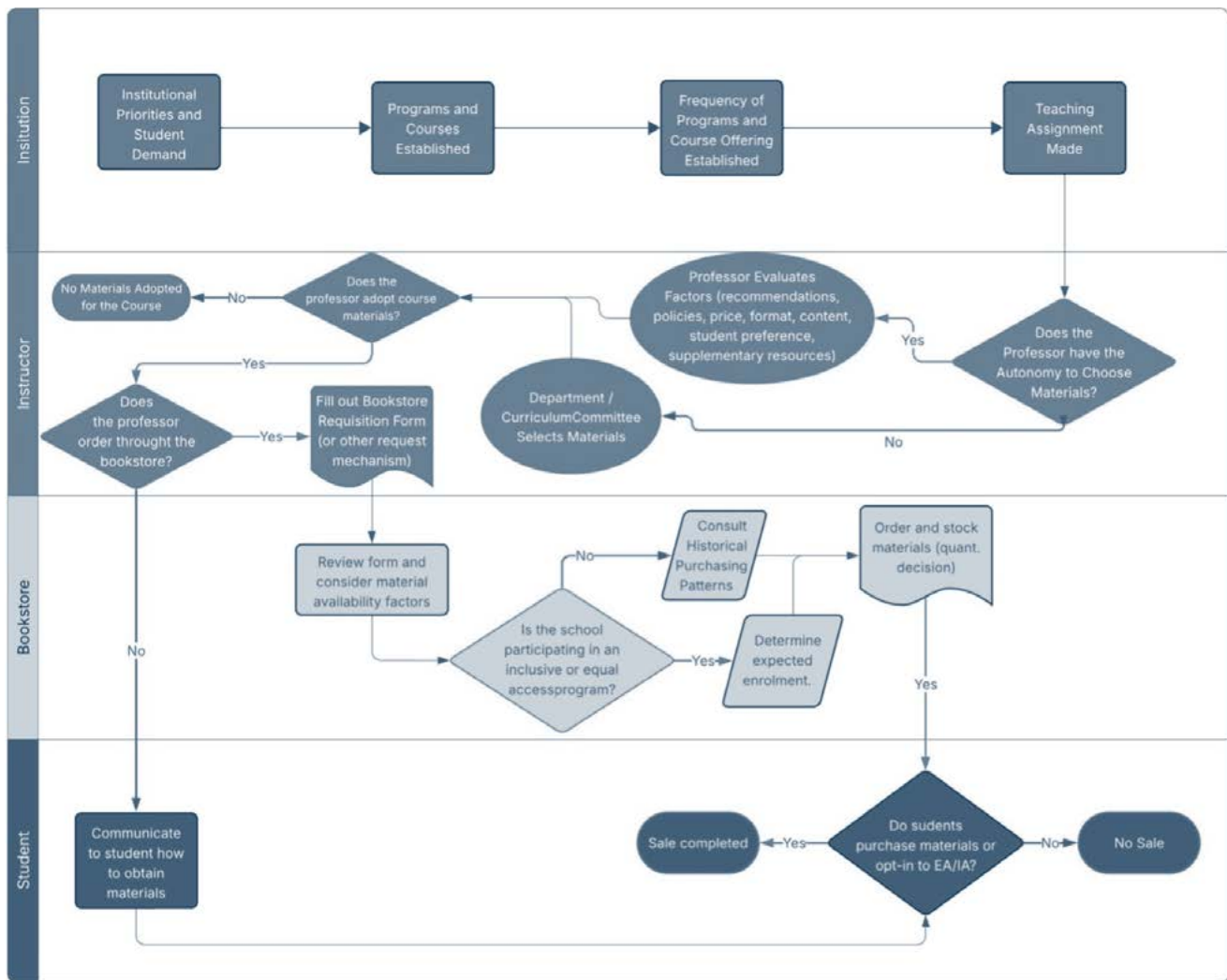
ment system (LMS), a pattern that has led some presses to designate their titles as single-user rather than include them in multi-user library bundle deals, precisely because link-sharing at scale cannibalizes sales. Other instructors may bypass institutional copyright clearance altogether by implementing strategies such as hosting PDFs on personal Google Sites, cloud folders, or informal course repositories outside the LMS, where university copyright offices have no mechanism to intervene, and which is, in effect, a form of piracy.

Assuming the instructor places an order for course materials with the campus store, the buyer receives instructor orders and calibrates purchasing against historical sell-through patterns, weighing the trade-offs between underordering (and potentially losing sales if a re-order is needed) and overordering (which can result in costly returns).

Bookstore decisions on purchasing are also dependent on whether or not the institution is participating in an inclusive or equitable access program. Where such programs exist, purchasing decisions follow a different logic, typically bulk digital licensing rather than individual-copy ordering. Where they do not, buyers typically rely on historical sell-through data for the course or comparable courses, sometimes supplemented by informal knowledge about specific student cohorts.

At the end of the chain, students decide whether to purchase, rent, borrow, or forgo the required materials altogether based on a confluence of drivers that are outlined below, including anticipated course usage, format preferences, and the availability of alternatives, but, perhaps surprisingly, not strongly by individual financial anxiety.

Figure 1: The Course Material Adoption Chain, Simplified



# 3. Findings - Key Course Materials Adoption and Purchasing Trends and Drivers

The resulting analysis is driven by an analysis of buying patterns from over 81,000 unique adoption records between 2019 and 2025 supplemented by qualitative interviews conducted with several actors along the course materials adoption chain and a survey of over 400 current students. Across the corpus of interviews, we analyzed comments by topic, while considering the role of interviewee in the course materials adoption chain, to be able to elucidate common themes. As such, this section is concerned with outlining the trends in course material adoption and purchase as well as the drivers that are contributing to evolving adoption and buying patterns at postsecondary institutions in Canada.

## 3.1 Structural Shifts

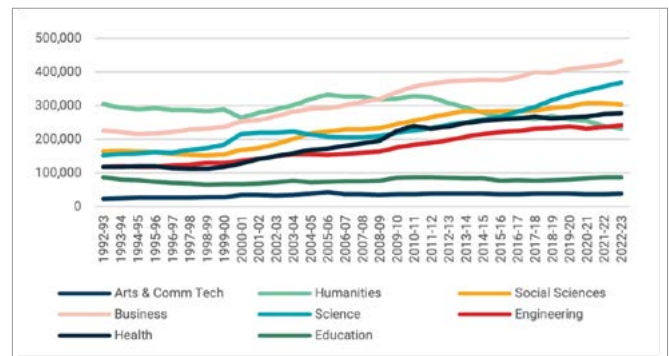
To understand the evolving landscape of course material adoption, one must first examine the foundational shifts occurring at the macro-institutional level. Chief among these drivers are the long-term fluctuations in student enrolment, which fundamentally redefine program demand and the subsequent volume of materials required. This section outlines the overarching trends in student enrolment and their granular impact on subject-specific adoption patterns, establishing the necessary evidentiary baseline before exploring the specific drivers that propel these changes.

### 3.1.1 Enrolment Fluctuations

Institutions' offerings and student enrolment shifts have a substantial bearing on course material sell through. After all, course materials can only be adopted for a course that exists, and courses only exist as part of institutional portfolios of programs and departments that offer courses as part of programs or as open electives. There have been notable changes in college and university enrolments in the last 30 years. As Figure 2 shows, while Humanities had the most enrolments in the early 90s, they had the sixth most enrolments by the early 2020s. Enrolment in the social sciences, on the other hand, increased substantially, adding nearly 100,000 enrolments over the 30 year period even though it was the third most popular category of disciplines by enrolment in both the early 90s and early 2020s.

Overall, there are other notable trends. Since 2012-13, enrolments in engineering and science experienced the highest levels of relative growth with engineering enrolments increasing by 23% over that period, surpassing overall

Figure 2: College and University Enrolments by Major Field of Study, 1992-93 to 2022-23



enrolments in humanities for the first time in 2022-2023, and science enrolments more than doubling (a 52% increase) during that period. Business, Health and Social Sciences each experienced moderate increases, 16% in the case of business and health and 10% in the case of social sciences. The humanities experienced a decline of approximately 24% during that period. While these shifts may not have a direct impact on individual adoption decisions, they greatly impact the number of instructors who may be put in a position to make a decision about course material adoption, and, consequently, which types of course materials face growing or shrinking pools of potential adopters.

Aggregate trends in enrolment can mask some important differences by institution type. With respect to changes in course preferences among postsecondary students, the humanities and social sciences, the disciplines in which members of the Association of Canadian Publishers publish most of their materials, have experienced different trajectories: While humanities enrolments have declined across both the college

Figure 3: University Enrolments in Humanities and Social Sciences, 1992-93 to 2021-22

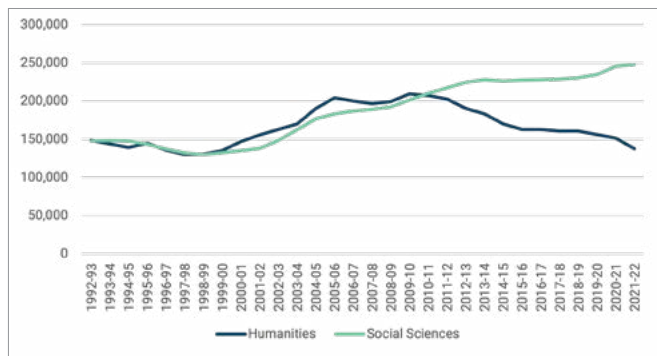
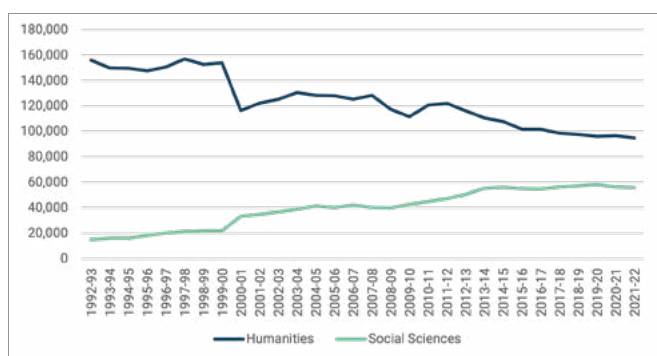


Figure 4: College Enrolments in Humanities and Social Sciences, 1992-93 to 2021-22



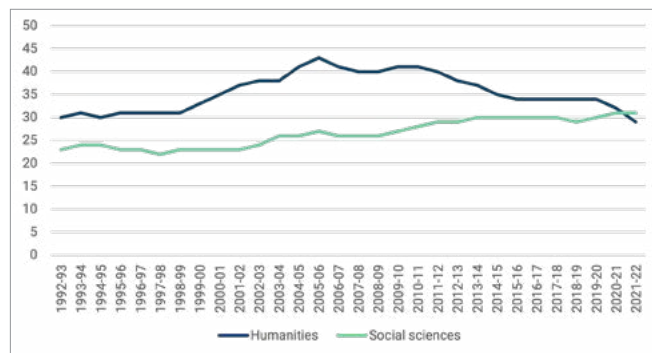
and university sectors since at least 2009, social sciences enrolments have been increasing (see Figures 3 and 4).

More precisely, with respect to university enrolments, between 2011-12 and 2021-22, the humanities fell by 32%, while the social sciences increased by 14%. Enrolments in social sciences surpassed those in humanities courses around 2011. At the college level, however, the Humanities continue to represent a larger proportion of enrolments than social sciences, even though they have been declining in the last few decades. This is due in part to the nature of Quebec colleges, where a large portion of university-bound students are enrolled in CEGEP programs considered to be part of the humanities.

Changes in course enrolments have implications for class sizes and therefore the distribution of course material adoption patterns. Most fields have seen rising student-faculty ratios, including the humanities up until the mid-2000s. In the humanities, this ratio is decreasing because enrolments have dropped faster than faculty positions over the past fifteen years. For publishers, this may be a bellwether

indicating that in the social sciences, each adoption by a course instructor is likely to result in an increase in potential sales to students whereas the opposite would be the case for humanities courses.

Figure 5: Ratio of Enrolled Students to Full-Time Tenure and Tenure-Tracked Academic Staff, by Broad Field of Study, Canada, 1992-93 to 2021-22



### 3.1.2 Faculty Employment Patterns

These structural shifts in enrolment patterns are occurring alongside escalating operational cost pressures on colleges and universities. In response, until the Immigration, Refugees, and Citizenship Canada announced its cap on International Student Permits in 2024, colleges and universities had reportedly become increasingly reliant on contract-term teaching positions<sup>3</sup> wherein instructors are less likely to be compensated for out-of-class preparation time and may be assigned courses on short notice. The implications of these shifts in teaching complement have been important for the course materials market. Faculty interviewees described a recurring pattern: instructor turnover means that course material decisions are frequently revisited, sometimes abandoned, with each new appointment. When a contract instructor is assigned a course weeks before it begins, the practical result is often a reliance on whatever materials are most immediately accessible. This churn works against the kind of sustained publisher-instructor relationship that smaller Canadian publishers have historically relied upon. Several publishers maintain sales representatives who visit the majority of large universities and colleges in Canada at least once annually, a practice spanning several decades. That kind of long-term relationship building presupposes a stable teaching complement. When instructors cycle through courses on short-term contracts, these relationships are harder to establish and maintain, and publishers with smaller sales forces are disproportionately affected. Newer faculty, sessional or contract faculty or those

teaching upper-level expert-driven electives often described a lack of connection with knowledgeable publisher representatives, awareness of course material options, limited interaction with previous or other faculty, which resulted in a sense of isolation when aligning course material options with learning outcomes. Faculty view publishers as well-situated to share trends and approaches and provide a community of practice to not only introduce course material options, but share collective knowledge of approaches to course design, notable texts, digital and multi-media options being offered by other expert faculty in similar fields of study.

Moreover, the loss of administrative support within departments compounds these pressures. Where departmental assistants typically help coordinate textbook orders, maintain course material records across semesters, and serve as a point of contact for publisher representatives, budget cuts have reduced this capacity at many institutions. When combined with the proliferation of formats and platforms available, the administrative load of selecting, ordering, and integrating course materials has grown just as the support infrastructure has shrunk.

### 3.2 The Course Materials Adoption and Purchasing Landscape

The postsecondary course materials environment is characterized by two major forces: macro-level fluctuations in student populations and subsequent micro-level changes in material selection.

#### 3.2.1 Humanities and Social Sciences Subject and Course Level Patterns

Further consideration of course materials adoption data from the Brian Murphy Group offers a more granular view of how these enrolment shifts translate into actual course material selections within the HSS disciplines specifically. As shown in figure 6, which draws from over 247,000 adoption records in humanities and social sciences between 2021 and 2025, the top 12 course subjects, which account for approximately 73% of all reported HSS adoptions during that period, shows that English dominates, representing nearly a fifth of all HSS adoptions in the most reliable years of data coverage (2022-2024), followed by Psychology at around 11-17% and Sociology at 7%. Anthropology, Communication Studies, History, and Political Science each account for between 3% and 8% of adoptions per year.

The distribution of adoptions across course levels provides further insight into where the market's volume resides. As shown in figure 7, introductory and general undergraduate courses dominate across all observed years, accounting for approximately 36-43% of all HSS adoptions, with intermediate undergraduate courses representing another 25-34%. Together, lower-division courses (Introductory undergraduate and intermediate undergraduate) represent the majority of the adoption market, which is significant because, as interviews with faculty and students alike revealed, these are the courses most likely to use a traditional textbook as the primary assigned resource. Upper-division courses, graduate courses, and non-degree programs collectively account for the remaining share but tend to rely more heavily on journal articles, edited collections, and instructor-assembled materials.

Figure 6: Proportion of Adoptions by Subject, Top 12 subjects (representing 73% of all adoptions catalogued), 2019-2025

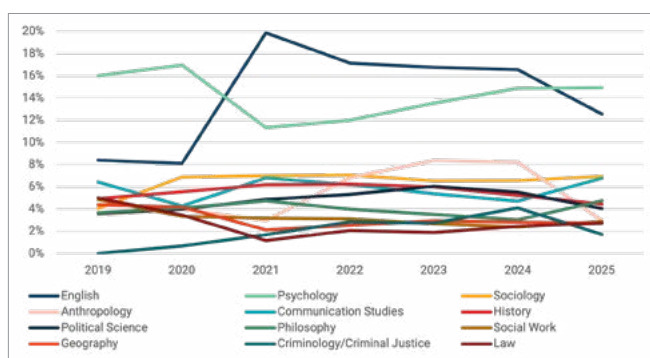
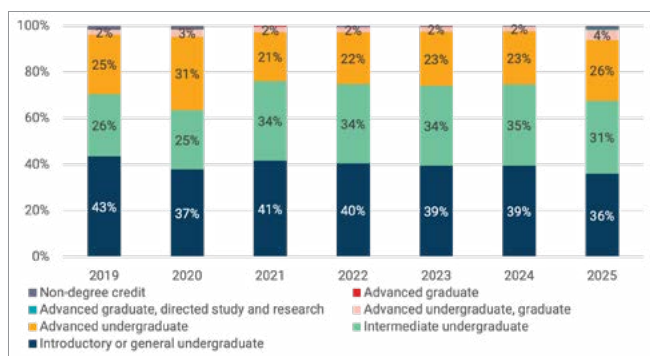


Figure 7: Adoptions in HSS Courses by Course Level, 2022-2025

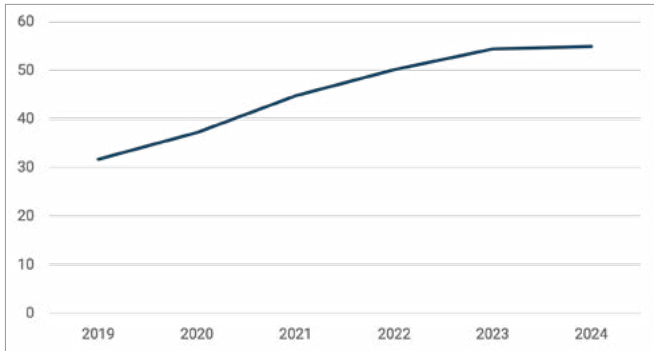


#### 3.2.2 Adoption Intensity

One of the more telling findings from the BMG data is the relationship between adoption intensity and enrolment growth. Earlier, it was suggested that since the ratio of enrolled students in social sciences to full-time tenure and ten-

ure-tracked academic staff (figure 5) was increasing, this could translate into more sales per adoption. Indeed, the mean enrolment per section in the BMG data indicates growth in the average size of reported class from 2019 to 2022 and flattening in 2023 and 2024 at around 54 students (Figure 8).

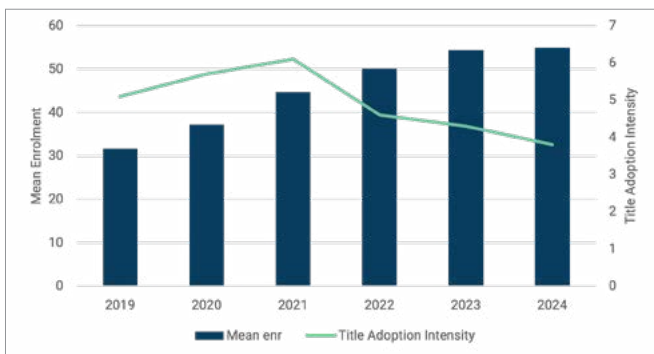
Figure 8: Mean Enrolment by Report Course Section, Humanities and Social Sciences Courses, 2019-2024



Theoretically, if classes are getting bigger, every single adoption won by a publisher should be worth more unit sales. However, the data shows that this multiplier is not large enough to make up for the decrease in total adoptions. Even as classrooms got more crowded, the number of potential sales hit a ceiling.

We can see the extent to which growth in classroom size translates to growth in potential sales not by looking at total adoptions, but rather at adoption yield, which is how many title are being adopted for every 100 students in the reporting pool. As Figure 9 shows, in 2021, every 100 students in our reporting pool generated 6.1 adoptions. Today, that same group of 100 students generates only 3.8 adoptions. This represents a 37% decline in market density in just three years.

Figure 9: Title Adoptions per 100 to Mean Enrolment, 2021-2024

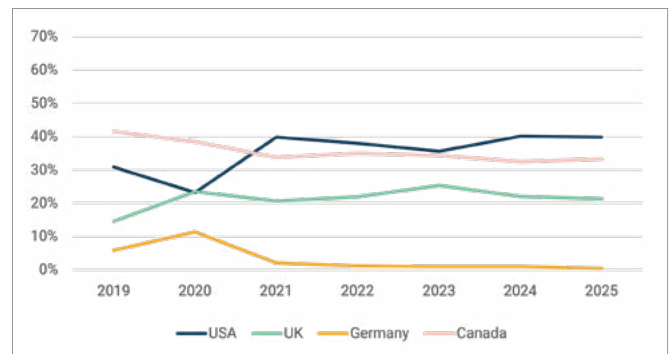


The upshot is that the modest gains in class size are no longer enough to offset the stagnation in title adoption volume. There may be more students per section on average, but the link between headcount and title adoptions is not linear meaning that the “intensity” of adoptions is decreasing. The classes are getting bigger, but the rate at which those students are being required to obtain titles for courses is falling significantly faster.

### 3.2.3 Canadian Publisher Market Share

With respect to Canadian publishers specifically, the BMG data indicates that Canadian-headquartered publishers account for approximately 33-34% of HSS course material adoptions in recent years (2023-2025, see Figure 10), down from a high of roughly 43% in the earliest years of the dataset when coverage was more limited (2019-2021). From 2022-2024, when the dataset is most stable, the Canadian share has held relatively steady at around 33%.

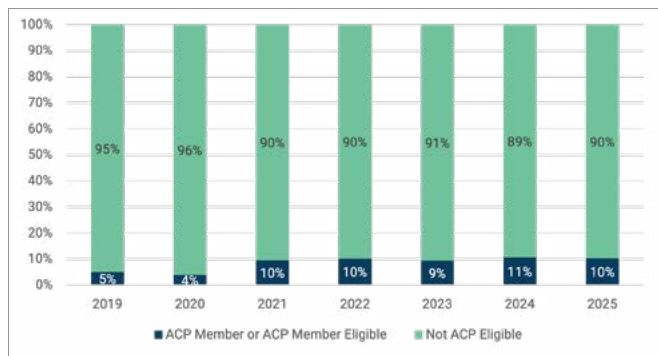
Figure 10: Publisher Market Share in HSS Adoptions, Selected Countries 2019-2025



Within the Canadian market, there are ACP and ACP Eligible members<sup>4</sup>. These publishers represent a portion of all Canadian publishers. Considering ACP member and ACP eligible publishers only, we note that the market share remains relatively stable at around 10% in the most stable years of the data set (2021-2024) (see Figure 11).



Figure 11: ACP Member Publisher or ACP Member-Eligible Publisher Market Share in HSS Adoptions, 2019-2025



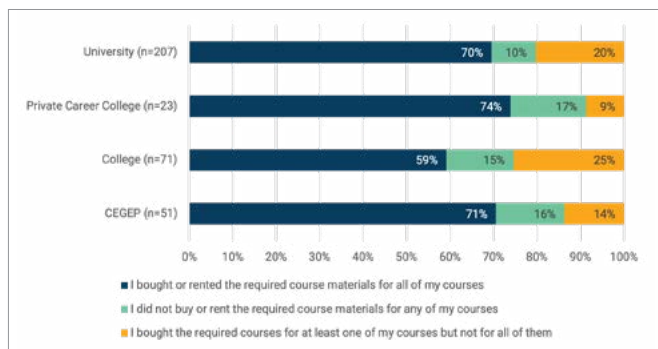
ACP members are holding their ground with respect to their market penetration but not significantly shifting the overall share. ACP members are maintaining their relative position in a reporting pool that is seeing decreasing intensity (as shown in Figure 9).

### 3.3 Economic Drivers and Purchasing Behaviour

Enrolment trends and, consequently, adoption patterns observed in the Canadian HSS sector are driven by a confluence of several factors, not the least of which are economic considerations by several members across the adoption chain. This section examines the primary drivers—starting with student affordability—that are currently dictating purchasing behavior and the long-term viability of traditional material models.

Most students who responded to the survey bought or rented all the required materials for their courses. Students at (public) colleges were less likely to buy or rent all their materials than students at universities, but a majority (59%) still bought the materials for all their courses.

Figure 12: Purchase/Rental Decisions by Type of Institution

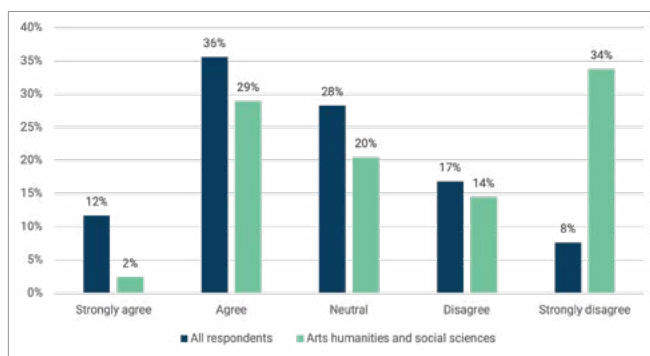


The following analysis can provide some insight into the students who choose not to buy or rent required materials, but they are a minority,

#### 3.3.1 Affordability and Price Sensitivity

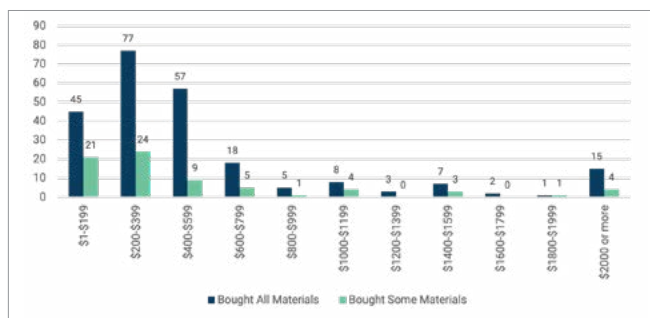
Price sensitivity is a factor for a significant proportion of students, with 48% of survey respondents viewing material costs as a significant financial burden (see figure 13). However, respondents in the Arts, Humanities and Social Sciences<sup>5</sup> were much less concerned than students in other disciplines, with a clear majority disagreeing that these costs are a significant financial burden.

Figure 13: Student Perceptions of Course Material Costs as a Financial Burden by Purchasing Behaviour (n=368, n=83)



Among the 241 student respondents in the survey who provided information about how much they spent on course materials in the past semester, the modal category (that is, the most frequently selected spend range) for students was between \$200-399 (n=77). The median is higher, residing in the \$400-499 range. Overall, nearly three-quarters of respondents (74.3%) spent less than \$600 on course materials. Fifty-one percent spent less than \$400.

Figure 14: Student Spending on Course Materials in their Most Recent Term of Study by Purchasing Behaviour (Self-Reported) (n=314)

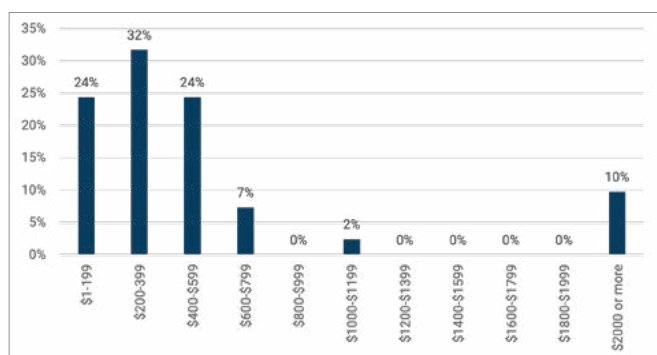


Students who bought for only some of their courses spent a median of \$270 for the semester whereas students who indicated they bought for all courses spent a median of approximately \$350.

Of the students who reported both their spending and the number of courses they were taking, 41 were in the Arts, Humanities and Social Sciences and all bought the required course materials for all their courses. For this group the median spending per course was \$87.50, less than the \$100 for students in other disciplines. This figure was reduced by the inclusion of college, CEGEP and private career college students in the sample. University students in the Arts, Humanities and Social Sciences had a median spend of \$100 per course with required materials.

The distribution of spending for this group is similar to the pattern for students in other disciplines, with most students reporting spending under \$600.

Figure 15: Spending on Course Materials in Most Recent Term of Study by Arts, Humanities and Social Science Students (n=41)



Students' willingness to spend on course materials depends on their perceived value as much as their cost. When asked about characteristics influencing decisions about purchasing and format, price was important, but so was the availability of free online alternatives (including through piracy). In qualitative responses, interviewees noted that being required to buy a book which was rarely used in class was a major frustration and made them think twice about buying required materials in future. Perhaps surprisingly (as renting is marketed as a low-cost alternative) buying over renting emerged as a preferred cost-saving alternative, as it allows for cost-sharing with classmates.

Both faculty and students in interviews noted budget constraints and price sensitivity as an important variable

influencing the purchase and adoption of course materials, leading instructors to consider cheaper or free alternatives, such as renting a book for shorter term (which has limited buy-in, as noted below), assigning public domain materials, and even substituting academic materials for purchase with free, popular audience alternatives, such as material available on YouTube. In large enrolment courses, the scale amplifies cost considerations for some faculty, with one instructor noting the cost implications for 1500 students rather than considering the cost on a per student basis. However, price influence mechanisms differ between faculty and students: faculty report choosing less expensive or free materials to reduce the financial burden on students, whereas students report foregoing materials altogether not at a specific price point per se, but rather when the costs exceed their perceived value relative to the course requirements. Students reported often drawing on peer networks and online platforms such as Rate My Professor and Reddit to inform these decisions. In other words, if the text was perceived as highly correlated to notable improvements in the likelihood of succeeding in the course, price sensitivity decreased substantially.

That price was important but not the strongest driving factor is supported by a cross comparison across key indicators (financial anxiety, grade anxiety, time pressure) between students who bought and those who did not. As shown in figures 16-18, there are no clear differences between students who purchase/rent materials for all courses versus those who purchase/rent for no courses across key indicators. For many students, decisions are driven by course requirements rather than student finances. There are some differences between those groups and students who pick and choose for which courses they will buy or rent materials, but they are a much smaller group.

Figure 16: Levels of Finance-Related Worry Among Students with Different Material Purchase Behaviors (n=368)

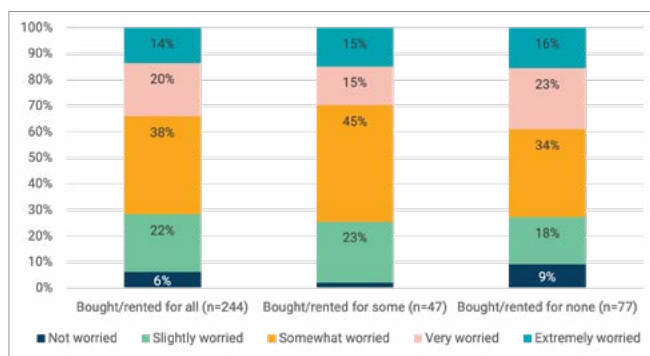


Figure 17: Levels of Grade-Related Worry Among Students with Different Material Purchase Behaviors (n=368)

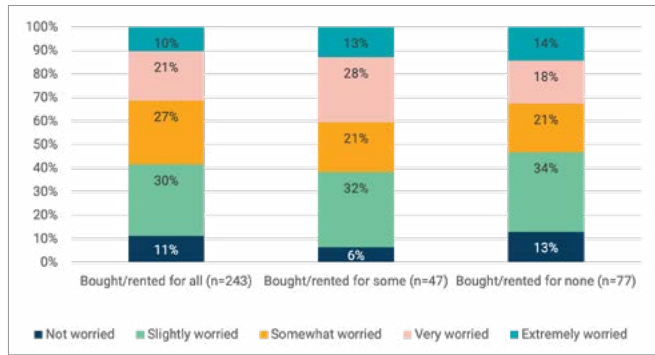
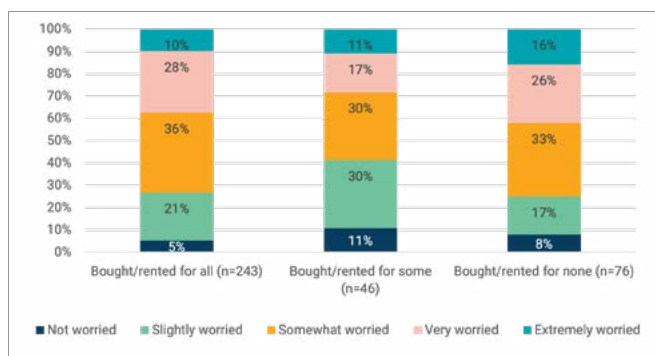
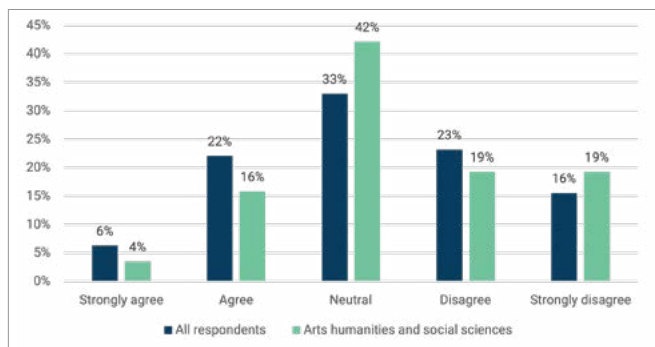


Figure 18: Levels of Time-Related Worry Among Students with Different Material Purchase Behaviors (n=366)



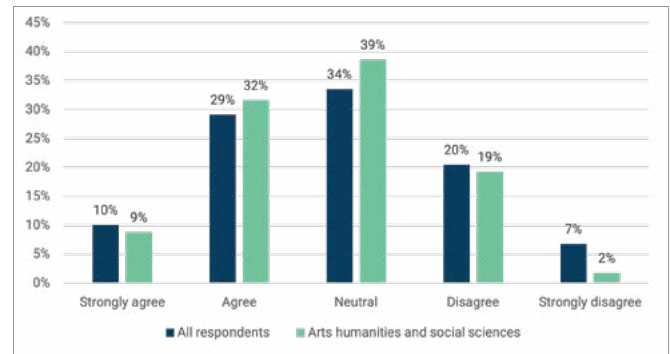
Notwithstanding the above, some students do report foregoing purchasing course materials because they simply cannot afford them. A non-trivial minority of respondents (28%) reported that inability to afford materials had harmed their academic performance (see figure 19), though this was less common among respondents in the arts, humanities and social sciences (20%).

Figure 19: Perceived Impact on Student Academic Performance Due to Course Material Affordability, Self-Reported (n=367, n=57)



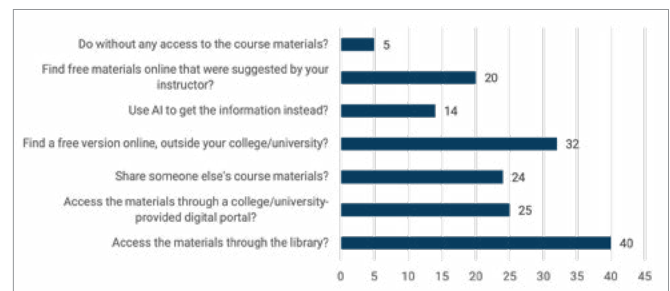
Further, a significant minority (39%) also believed they could find required cheaper alternatives to required course materials quite easily (Figure 20). Indeed, very few students simply did without course materials. As noted above the ability to find alternatives easily greatly impacted the degree to which students were willing to buy the material.

Figure 20: Degree to which Students Perceive they can Easily Find Cheaper Course Material Alternatives (n=367, n=57)



As outlined in Figure 21 where students opting for alternatives to renting or purchasing, they reported predominantly accessing the materials through the library and/or finding a free version online. They used a wide variety of alternative sources to obtain the materials. The most common were the university library and finding a free (potentially illicit) version of the materials online.

Figure 21: Ways Students Obtained Course Materials When They Chose Not to Buy (Select All that Apply)



Only five Arts, Humanities and Social Science students who responded to the survey were in this position making the sample size too small from which to draw any significantly robust takeaways that would apply to this subset of students in particular.

Piracy by students is a factor affecting demand for legitimate course materials, although most students do not seem to be

doing this. Anecdotally, some students who have a strong preference for permanent paper resources may choose to print whole books if only digital access is available.

### 3.3.2 Structural Adaptations to Rising Price Sensitivity

Over the years, there have been several attempts to address price sensitivity and its impacts on sell through and adoption rates. These have included rentals, purchasing used books, sharing books, adopting an inclusive access model (IA), and adopting Open Educational Resources (OER). These adaptations have reached various levels of acceptance, success (differently defined by different interested parties) and have made the course materials selection and purchasing ecosystem more complex.

#### 3.3.2.1 Rental Programs and Temporary Access Options

Rental programs, first introduced as physical rentals offered by bookstores and now more commonly as digital rentals where students obtain digital access to a text for the duration of the course, were introduced as a means of providing a more affordable option for students. Our interviews revealed that these programs are generally viewed skeptically, with one faculty member stating they hate rental books and another calling the practice “gross”, as rental models often (but not universally) cost a significant percentage of the full book price, while offering no resale value or ongoing/long-term access (which can be particularly important for foundational texts that have use beyond a single term)—a sentiment shared in student interviews as well.

A significant proportion of students nevertheless appear to make use of rental programs. In our survey, 42% of students who acquired course materials for some or all of their courses rented at least some of them (see figure 22).

Students who indicated that they do not always buy all course materials for all of their courses are more likely to rent than students who report buying all course materials (77% vs 58%). There are limited benefits to publishers or campus stores as well. Renting appears to reduce purchasing — almost all renters said they would have bought if renting weren’t available (See Figure 23). Students valued owning physical textbooks but noted high costs pushed them toward time-limited digital rentals, which they reportedly found frustrating.

The practice of rental programs therefore appears to be one where no one is terribly satisfied. Students appear to partici-

pate reluctantly because of personal circumstances rather than enthusiastically. Some professors report finding the practice rather distasteful, and bookstores are losing out on sales they otherwise would be getting if rental was not available.

#### 3.3.2.2 The Used Book Market

Figure 22: Proportion of Students who Rented Course Materials in the Last Semester (Did you rent any of your course materials?) (n=245)

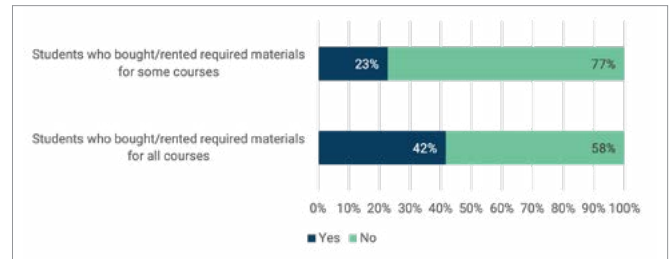
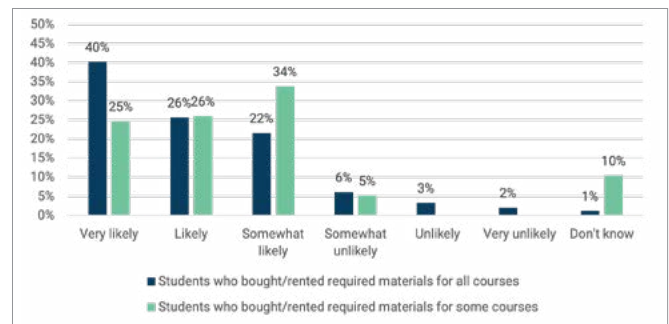


Figure 23: Student Likelihood of Purchasing Course Materials Without Rental Option (If you had not had an option to rent, how likely is it that you would have bought the course materials?) (n=246, n=77)



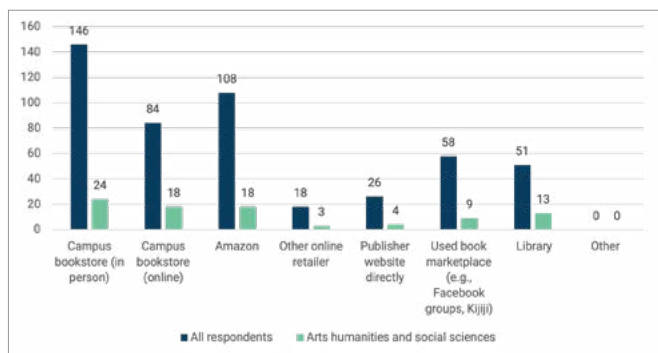
The used book market has been affecting publishing sales and campus store sell-through for decades and is perhaps the oldest student cost-saving strategy. When campus stores supplied physical copies primarily, buy-back programs and selling used copies featured an important part of inventory. For students, the ability to sell books privately has also been common practice. Supporting access to used books remained front of mind for several interested parties in the adoption chain that we interviewed. Faculty reported keeping textbooks for multiple years to reduce prices for students, indicating that used books are a practical response to student budget constraints, hoping it will increase student access to the text. If the text is in its third or fourth year of use, for example, then the rationale forwarded by interviewed faculty is that students will likely not see value in

buying a (new) but mostly outdated text. This practice, we were told, is only applicable in certain disciplines where course material content does not need very regular updates.

When students were asked where they typically sourced their materials, however, the used book market did not feature as a prominent avenue for acquisition. With bookstores increasingly moving away from print, used-book marketplaces, such as Facebook marketplace or other selling groups are understood to be the primary way in which students exchange used books. Out of 491 selected responses, only 58 respondents indicated that they purchased one or more of their books through a used marketplace (see figure 24).

Several factors are likely to have contributed to the curtailing of the used book market, most notably, the increasing proportion of course materials delivered through online formats, which are not resalable.

Figure 24: Where Students Purchased their Course Materials (Select all that Apply)



### 3.3.2.3 Inclusive Access Programs

Inclusive access (IA) models that distribute resource costs among students (alternative models with similar goals go by various names including equitable access, digital textbook access, and e-text initiative) are typically flat-rate, digital-first course-materials subscription programs for undergraduate students, provided on an opt-out basis (and, very rarely, on an opt-in basis) and a relatively new effort. These programs have drawn mixed reactions from interested parties along the adoption chain<sup>6</sup>. These mixed responses manifest largely as a difference in interpretation of the value of the trade-offs with respect to access and costs inherent in inclusive access programs. Third party research indicates that programs do increase student access to materials<sup>7</sup>, but research is split on whether or not these programs support

increased student retention and success<sup>89</sup>. The lower cost than individual purchase, regardless of chosen field of study, and convenience of having materials automatically delivered right to their learning management system (LMS) have been reported as some of the reasons for the success of this program. However, those who oppose IA models, reported that these programs have the effect of removing student choice of how to acquire materials, effectively making purchasing materials the default and challenging zero-cost textbook (ZTC) initiatives on campuses<sup>10</sup>. While there are some student groups who oppose inclusive access programs on the grounds that they limit student autonomy and choice with respect to course materials, most student interviewees with which we spoke were either unaware of inclusive access type programs or indifferent. In one case, a student interviewee who does participate in an IA program indicated that the convenience of having all texts on day one and receiving a package with all her physical course materials was extremely convenient, which was not an insignificant benefit as a time poor student (see section 3.6.1 for more on time poverty and its impacts on students and their engagement with texts).

Interviewees from campus stores supported inclusive access programs as providing predictability and stability with respect to inventory management. One of the biggest challenges bookstores articulated was effectively managing inventory and returns, a problem that is largely solved with inclusive access type programs, which work through digital first offerings, but also offer predictable sell through for materials that are only available in physical copy. There are regulations that make the implementation of such programs not possible at every institution, however. One campus store interviewee noted *de jure* barriers exist to implementing inclusive access at certain institutions. For example, at some institutions, the campus store is unable to charge fees to student accounts, a necessary ability to implement the program at the institution.

### 3.3.2.4 Open Educational Resources

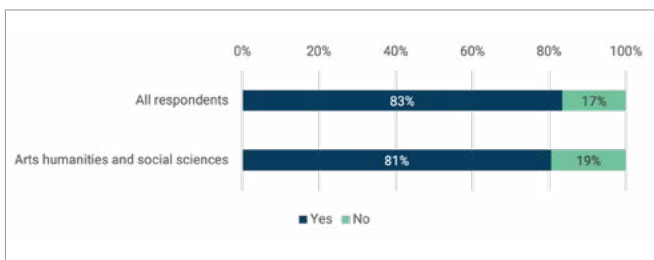
Finally, discussions around Open Educational Resources (OER) surfaced the tension between the idea that in its ideal form, scholarship is a trusted public good that advances shared interests in pursuing societal goals and human understanding (which means that, as such, should remain non-commodified) and the very real understanding that all actors within the knowledge development and transfer ecosystem need to be compensated. OER development falls largely as an attempt to make real the idea that knowledge development and circulation is for all, which is considered

laudable but, as interviewees acknowledged, fails to account for the material reality of the inputs required for the OER output. This tension led many participants to share the belief that OERs' ability to penetrate the course materials market will reach a limit, particularly since its reliance on governmental or philanthropic funds could expire, while simultaneously indicating an appreciation for the ideological underpinnings of the movement.



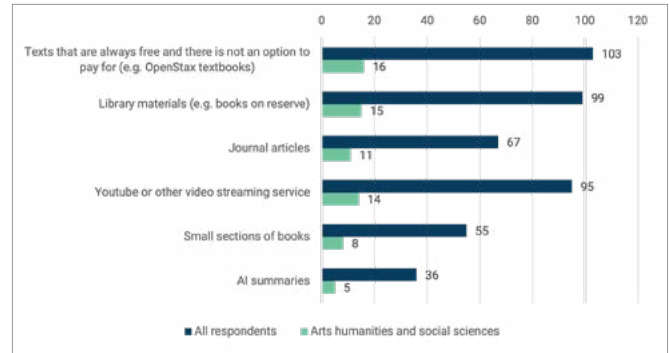
Nevertheless, survey data confirms that OER and free materials have achieved significant penetration in Canadian higher education already. Survey results support high uptake of OER resources with roughly 48% of respondents (219 out of 454) were enrolled in at least one course without required course materials, and in nearly all such cases (83%), free resources were either provided or assigned (see Figure 25). The most commonly assigned free resources were open educational resources (e.g., OpenStax) and library materials, representing just over 22% and 21% of cases, though a significant proportion of students were also assigned YouTube or other streaming video content (see Figure 26).

Figure 25: Prevalence of Instances when Students Were Provided with Free Course Materials in Courses Without Required Purchased Materials (n=217, n=36)



What initially served as a motivating force for the development of OERs—that is, removing financial barriers to access in the face of high course materials costs—continues to feature prominently as an important consideration for

Figure 26: Types of Free Materials Assigned in Courses Without Purchase Requirements



faculty adoption, according to our interviews with faculty.

Another perceived benefit was increased student engagement. Faculty reported that since it was free, they observed students engaging with the material readily instead of waiting to see whether or not purchasing the material would be worth the investment. Moreover, in several interviews, instructors moved away from commercial textbooks and instead sourced external OER materials, then integrated them directly into the course structure. Limitations of OER adoption identified included lack of suitable content, including explicitly the lack of Canadian content.

Student interviews corroborated these findings. Interviewees indicated these alternatives are instructor-driven rather than student-sought: students engage with open-source or instructor-produced texts, videos, and podcasts when recommended by faculty but do not typically seek them out independently. Interviewees observed, too, that these alternative materials, in their experience, are most commonly assigned in courses that are a part of institution-wide or general education requirements, which may include—as interviewees cited—courses such as Indigenous studies or communications requirements, rather than courses that are required for students' programs.

### 3.3.3 Campus Store Returns

While we have to date focused on cost as a driver from students and faculty decisions, it also has bearing on bookstore buyers' decision-making. Return rates have implications both for publishers who need to manage them and for buyers who incur costs and time to complete them in the event that they do not sell all their stock. In some cases, the costs of returns have forced bookstores to change their



business model entirely. In one instance, a campus store respondent indicated that return rates had been approaching 80% in recent years, making stocking print economically unviable; As a result, the store ceased selling print textbooks at retail entirely in September 2024. The bookstore now operates on an affiliate model for print, collecting a commission on sales fulfilled by an outside party rather than holding inventory.



Bookstore interviewees who continued to stock physical materials indicated that sales and sell through are intimately tied with the ability to properly forecast demand, which they added was an increasingly difficult thing to do well. Not only are buying patterns fluctuating across disciplines and over time, but the proliferation of formats and options have made accurate forecasting all but impossible. Bookstores nevertheless want to provide students with their first-choice form of material (lest it create a vicious circle of decline wherein students would buy from the store if only had the store stocked what the student wanted when they wanted it and because having multiple formats is now the expected norm, according to students). When accurate forecasting is not possible, which has especially been the case since the onset of the Covid-19 pandemic, we heard, there are real consequences. Under ordering and over ordering are both bad for sell through, which is bad for bookstores and publishers alike and contributing to the former's decline. Publisher return windows, bookstore interviewees shared, make this more complicated and harder at a time when bookstores are struggling.

### 3.4 Technological Drivers

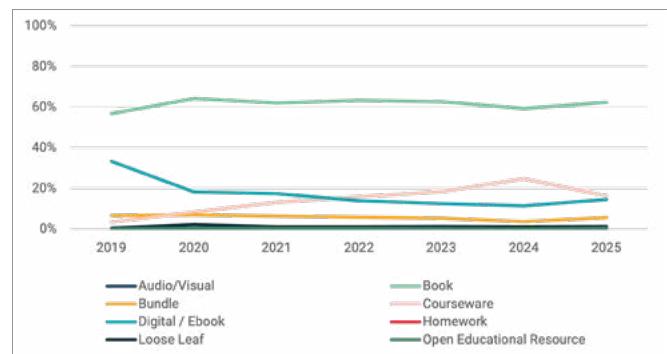
While professors' and instructors' influence, followed by economic considerations, largely dictate *which* materials students acquire, changes in educational technology are impacting *what* those materials look like and how they are utilized in the classroom. According to Bergstorm et al., the scholarly education materials market is now undergoing a

"second digital transformation" transitioning from the mere digitisation of print-era legacy formats toward a natively digital, interlinked, and service-oriented ecosystem<sup>11</sup>. Both the ongoing digital transformation and the advent of generative artificial intelligence are currently reshaping the value proposition of traditional publishing.

#### 3.4.1 Digital Transitions

The shift towards providing resources via digital format being a long ongoing shift in the sector did not temper how interviewees considered its impact. It featured as the most operationally disruptive force for campus stores in particular. Most interviewees indicated that digital had overtaken print sales, with some noting this occurred before the pandemic and others identifying COVID-19 as the decisive accelerant. This observation is counter to what our publisher sales data from Brian Murphy Group indicated, likely meaning that the observation from campus store interviewees are reflective of the patterns across all types of publishers, including large commercial publishers, rather than the subset that belongs to the Association of Canadian Publishers. Looking at data from the BMG about adopting by format and controlling for Humanities and Social Sciences course material adoptions only, print still accounts for about two-thirds of adoptions. There was a one-time acceleration in the adoption of digital materials in 2020 and a relative flattening since (Figure 27).

Figure 27: Proportion of Adoptions by Format, 2019-2025

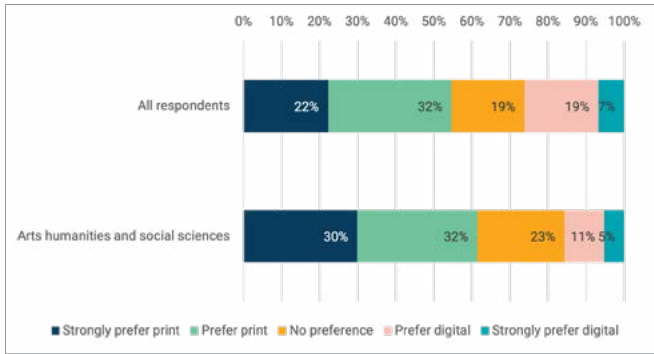


The shift to digital is not universally lauded. Despite a pervasive narrative that, as digital natives, students simply prefer digital resources, responses across the survey and in interviews are far more nuanced. When asked about format, student survey respondents tended to indicate that if given the option, continue to prefer printed course materials to online-only. Specifically, 200 out of 370 respondents



indicated that they either preferred or strongly preferred print (54%). In contrast, fewer than 100 out of the 370 respondents indicated a preference for digital to any degree, representing slightly more than a quarter of respondents (26%). Among survey respondents in the Humanities and Social Sciences, preference for print is even stronger: 64% of respondents prefer print with 16% preferring digital.

Figure 28: Student Preference for Print versus Digital (n=370, n=57)



Interview comments supported the theory that students prefer print, even though they expect to have the choice between print and digital. Both students and campus bookstore staff reported a resurgence in demand for print materials, which is more pronounced in certain disciplines<sup>12</sup>, driven by screen fatigue and the sheer multitude of platforms making accessing resources cumbersome. Some students described print as allowing for deeper learning: opportunities to mark-up or highlight valuable sections for studying along with being a foundational text to refer back to in more advanced courses within a subject area (particularly in the STEM fields). Some also remarked that to make full use of digital materials required additional investment and so opt for the traditional text and then consult artificial intelligence tools or online free resources to augment the text for their own learning. Additionally, as mentioned above, the shrinking price difference between print and digital makes the trade-off between formats far less appealing.

One group remains committed to digital adoption for practical reasons: Libraries face pressure on their shelf space so are not keen to buy physical books if they can avoid it, but they will obtain e-books wherever possible. These do not need to be highly sophisticated, but simply a digital version of the text with enough user permits for students to reliably access the information.

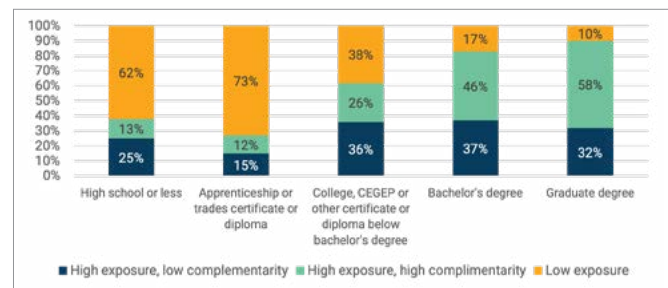
### 3.4.2 The Rise of Generative Artificial Intelligence

The growing use of Generative Artificial Intelligence (GenAI) is upending how instructors work with course materials and even how assessments are being designed and delivered, with important implications for course materials providers, such as publishers. One study from the US showed that approximately half of students and almost a quarter of faculty are regular users of GenAI<sup>1314</sup>. Whether a positive development or not, GenAI is a part of postsecondary education now. GenAI has the potential to impact several types of activities within the higher education sector, and more precisely on the Humanities and Social Science. For instance:

- AI is forcing many instructors to: (re)design curricula and assessments to prevent academic misconduct or to directly integrate the use of GenAI, to help with developing course material, or with grading. AI may be used to reduce workload for certain aspects of course design and delivery<sup>15</sup>
- Many AI models are raising concerns around intellectual property rights as models are trained to use existing knowledge work, including copyrighted work<sup>161718</sup>

AI models have the power to shape the social imagination, requiring the skilled analytical intervention of social scientists and humanists to ensure a just development and deployment of AI. AI literacy is estimated to become an increasingly prevalent requirement to succeed in the workforce, with organizations predicting that 80% of new jobs will require AI-literate workers<sup>19</sup>. Figure 29 shows AI occupational exposure and complementarity levels across educational levels in Canada, which displays the increasing level of exposure and complementarity expanding across the PSE sector.

Figure 29: Potential artificial intelligence occupational exposure and complementarity across educational levels in Canada, percentage of employees, May 2021, StatsCan



Faculty in interviews stated that AI is widely seen as transformative or described as a “tsunami” in terms of its disruption with a particular concern that students are trading the development of their critical thinking capacities, the very essence of education, for convenience. They pointed to a lack of coordinated response to this emerging technology in recent years. Many indicated that they and their colleagues were not really even able yet to fully deconstruct the evolving impacts and pivot in rapid ways to respond to this pedagogically nor able to provide a thoughtful recommendation with respect to how it affected course material choice.

A common adaptation in response to the technology’s impact on assessment is that “if it is important, it has to be done in the classroom,” to preserve educational integrity. Nevertheless, this approach leaves instructors hamstrung, as there are insufficient contact hours and much of the work is individual anyhow to support skill development. Some digital texts do restrict the volume of cut and paste options to prevent this, but many do not and, we heard, workarounds are relatively easy. Similarly, faculty will often also use AI or online related platforms (open access and free resources) to produce their own more customized teaching, assessment, pedagogical and applied supports. These latter advances in online, free and AI-powered accessible study supports could account for a reported reduction in interest in publisher-based courseware, assessment and learning features.

Traditional course material value adds, such as test banks and PowerPoint slides and homework systems provided by publishers in the interest of supporting student learning and supporting time-pressed instructors risk obsolescence with the development of GenAI. It has been common for faculty who choose textbooks, course materials and OER that come with added test banks, practice questions, definitional supports, slides and ways to engage the text (particularly for larger, undergraduate courses – or with multiple TA sections)—and some interviewees indicated that they still do—but acknowledge that these may not be as relevant when students are able to take traditional textbooks and use online free tools/platforms themselves, to copy in the text and then engage in the bespoke ways they prefer (e.g., Quizzlet, Notion, Perusall, ChatGPT, Gemini). Interviewees indicated that the advent of GenAI has dramatically lessened their usefulness, as this is one thing current models are actually really good at.

These support resources have historically been a differentiator for large publishers as their development was financially prohibitive for many smaller publishers. What has historically been a selling value proposition for large commercial

publishers at the expense of less well-resourced, smaller publishers has all but evaporated. AI tutorials, instructor resources and student study supports are acknowledged as very useful tools and many faculty view publishers being in a unique position to bring rapidly needed collective expertise, resources and guidance through AI-designed courseware.

Faculty outlined concerns about the lack of AI knowledge, practice examples and relevancy in current publisher offerings. This is particularly acute in courses in business, entrepreneurship, law, technology, computing and data analytics, where the course content seeks material that defines the rapidly evolving real-world applications of AI in the workplace. Students and faculty reported a demand for publications and texts that have the ability to maintain elements of foundational theories, core learnings and methodologies, while updating elements of case studies, simulations, data sets to account for developments in AI. This may require publishers to consider the layouts, links and potentially adaptable digital elements of course materials that could be more readily updatable with current innovation.

Contrary to faculty accounts that suggested deep overreliance on AI by students, student interviewees reported being much more restrained in their AI usage. Some reported using AI to summarize large volumes of data or to extract key concepts in an accessible way, for example, asking the models to ‘explain it to me like I’m a 5th grader’. On the other hand, others were more hesitant to use AI at all, particularly when connecting use with written assessments. Some students indicated that despite encouragement from faculty to engage AI to develop ideas, analysis or enhance learning of key concepts, they also have strict or explicit AI policies about submitting written assignments that have been supported by AI (e.g. having to report your use of AI or sign that you did not use AI at all), which left students uncertain about the best way in which to ethically incorporate it. In other words, most students reported using AI in ways that are concordant with how instructors reported hoping AI will develop—that is, as a surrogate instructor that engages with the student in their development.

### 3.5 Pedagogical and Content Drivers

Intersecting with developments in structural, technological and economic drivers are the ever-enduring considerations of pedagogical value and content that underpin faculty decisions to adopt texts and student decisions to purchase. As the world of education evolves, so too do considerations around what is considered useful, why, and by whom.



### 3.5.1 Instructor Influence and Perceived Usefulness

Despite concerns about cost, instructors assigning books and then not making them essential to student success was a commonly cited source of frustration and was cited as the determining factor in some students' decisions to purchase course materials or not.

### 3.5.2 Demand for Inclusive and Representative Content

Several faculty respondents described active efforts to include content related to social and critical race studies, disability studies, gender studies and anti-oppressive practice, and so expect their course materials to include engagement with these topics. There is also recognition that some subject areas still have critical gaps for recognition and representation of equity deserving communities, and that most materials, particularly textbooks, do not adequately reflect emerging or evolving discourses. Some faculty stated that this directly influenced their reliance on scholarly journals and digital (or multimedia) assets, which respondents considered more relevant.

Several faculty participants also indicated that incorporating Indigenous content where possible in their courses, and therefore course materials, was also a key driver in decision-making. However, they noted that form follows content when it comes to Indigenous works. Faculty interviewees noted that courses where Indigenous content needed to be centrally integrated did not entirely rely on traditional textbooks, but instead made use of online, visual, and audio sources that are engaging and felt more appropriately reflective of the content. Students in Indigenous courses also echoed these similar formats and options for course materials. Faculty emphasized this approach as important to protect and reflect cultural and historical integrity.

### 3.5.3 Demand for Canadian Content

Our interviewees shared that in first- and second-year foundational courses, particularly in STEM and theory driven fields, Canadian authorship is less critical, as instruction draws on international thinkers and widely accepted core frameworks. Participants shared that the importance of Canadian content varied both by discipline and course level. The desire for Canadian content has, according to faculty interviewee reports, even slowed the uptake of some OERs as some of these contain insufficient Canadian content.

Students, on the other hand, did not explicitly request more Canadian content, but their priorities reveal an implicit demand for it. In interviews, they repeatedly emphasized wanting course materials with direct relevance to their future professional and career contexts, citing that characteristic as a determining factor as to the value of the material for their learning—a requirement that necessitates Canadian-specific content and examples to deliver meaningful value in several disciplines.



### 3.5.4 Demand for Skills-Building Resources

The advent of all sorts of non-traditional educational providers created a renewed necessity for post-secondary institutions to articulate their distinct value to students and society. That distinction is largely articulated as a difference between content delivery and skills development. While post-secondary institutions do of course transmit content, their perceived primary value is in skill development. As a result, faculty expressed demand for tools that strengthen academic skills, not simply deliver content. Faculty interviewees expressed a desire for publishers to become allies in building students' academic skills through thoughtful pedagogical design and active learning resources rather than content delivery.

The importance of skills-based learning was particularly stressed by faculty interviewees teaching in applied business contexts where they described case-based resources as central to course design rather than supplemental tools. Similarly, the use of "Ivy Publishing business cases" highlights reliance on case-based learning resources that ground theory in applied scenarios, often with a Canadian focus. These types of resources shape both engagement and assessment design, which in turn heavily influence course material choices, indicating that course materials are not simply responding to course design, but sometimes shape parts of it.

### 3.6 Environmental Drivers

Considerations around whether to assign or buy course materials are greatly influenced by indirect environmental factors that nevertheless permeate course material decisions as students deploy novel strategies to meet course objectives and instructors adapt their teaching and choice of materials to changing realities facing their students and the needs of these same students.

#### 3.6.1 Time Poverty

Faculty participants observe that the student cohort has changed. They report their students are more time-strapped, whether with work or other extra-curricular engagements, than they would have been in previous years—a shift with direct consequences for course material demand and how faculty imagine being able to assign material. Faculty want to assign materials students will use, and students articulate gauging whether to engage with material based on perceived career value rather than intellectual exploration or professor expectations. In response to those expectations, we heard that there have been multiple initiatives to support students. For campus stores, this has come in the form of making course purchasing easier, either through more sophisticated ordering systems or convenience features ranging from direct integration into learning management systems to physical delivery options to inclusive access programs. For some faculty, initiatives include choosing course material that emphasize current case studies, simulations and multi-media digital resources, making the link between learning outcomes and real-world application ever more evident. This latter emphasis on currency was identified as reason faculty were moving away traditional publisher materials where the publication cycle is seen as too slow and therefore producing texts that are rapidly outdated and lacking in applied relevancy and instead moving towards coverage of current events using case studies and simulation exercises.

#### 3.6.2 The Attention Economy and Demand for Multi-Modal Materials

The attention economy further compounds difficulties in assigning large bodies of text. Faculty observed that students are engaging quickly rather than deeply and reportedly engaging less with text-based materials, gravitating instead toward visual and audio formats. Interviewees cited platforms like Perusall, as helpful platforms that

support different learning styles and improve outcomes and enhance pedagogy rather than replace it. Students who engaged Perusall stated this was the choice of particular faculty to adopt, but appreciated the ability for annotating assigned text, video and audio content.

Faculty report having to increasingly explain the value of readings in supplementing what is covered in class and not just a repeat of material. In response, some curate syllabi in such a way that they hope will keep students more engaged and captivated and keep readings “cheap and cheerful” and short (under 5 to 10 pages per lesson). This latter trend was particularly pronounced in reporting from college faculty, who shared the need for easily digestible texts with accessible language.

In sum, faculty interviewees on several occasions emphasized the need for three things: concision, accessibility, and relevance which they indicated needed to take the form of shorter, more media-rich materials that can sustain attention and connect with students. Several pointed to models like short introduction type texts as accessible formats or more dynamism in the layouts of textbooks to break up dense chapters with animation, simulations, digital links and reflexive questions. There were calls for updated current issues and texts that “speaks this generation’s language” and offer current real-world data, case studies and career relevancy, noting that some 2010-era textbooks still in circulation are not keeping pace with changes in AI, content, and presentation.

For some faculty interviewees, this was a natural evolution of how content needs to be curated and delivered. Others, however, described this shift as self-proliferating. With students having content delivered via highly engaging and gamified formats, the expectation is developing that this should be the norm. Faculty in the humanities and social sciences report adjusting their course material selection as expectations set by students’ experiences in other types of courses (where, it is implied, reading is less or not emphasized) mean that they adjust as well. In a moment when programs are structurally incentivized to compete for student enrolments within their own institution, and at a moment when the humanities in particular are under threat, instructors report being more likely to consider alternative formats that cater to students’ preferences so as not to risk further enrolment decline.

#### 3.6.3 Post-Pandemic Learning Patterns

Faculty also report rising student anxiety, accommodations, and difficulty with independence, and that those do shape



material choices. Several noted students today need significantly more direction and guidance than their predecessors and that they struggle with basic academic navigation tasks, such as finding the library, accessing open texts, or navigating course platforms or digital resources. These patterns were sometimes linked to COVID-era disruptions and students having passed through earlier stages “without consequences” or adequate guidance. As a result, many faculty reported that the impacts of the pandemic have resulted in the addition of remedial elements of course learning outcomes that are dedicated to teaching “how to read academic texts” rather than adopting or assigning materials that advance critical thinking or theory. This leads to a reduction in the adoption of traditional theory based, long-form texts or academic journals that can often be “dense” and not accessible or readily “digestible” for most current students, instead opting for more short, multi-media free digital resources or self-authored materials, slides or videos. Overall, most comments point to declining traditional reading engagement, increased career instrumentalism, and course redesign toward shorter, visual, in-class, and AI-aware approaches.



### 3.7 Synthesis: Key Drivers

What the preceding sections reveal is not a market under discrete, separable pressures, but rather in which structural, economic, and technological forces reinforce each other at several of the decision chain, creating a cascade of effects that are felt throughout the decision-making process. The table below synthesizes some of these key drivers and influences operating across students, faculty, librarians, and bookstore buyers, capturing both the factors that most meaningfully shape their behaviour.

#### 3.7.1 Compounding Forces

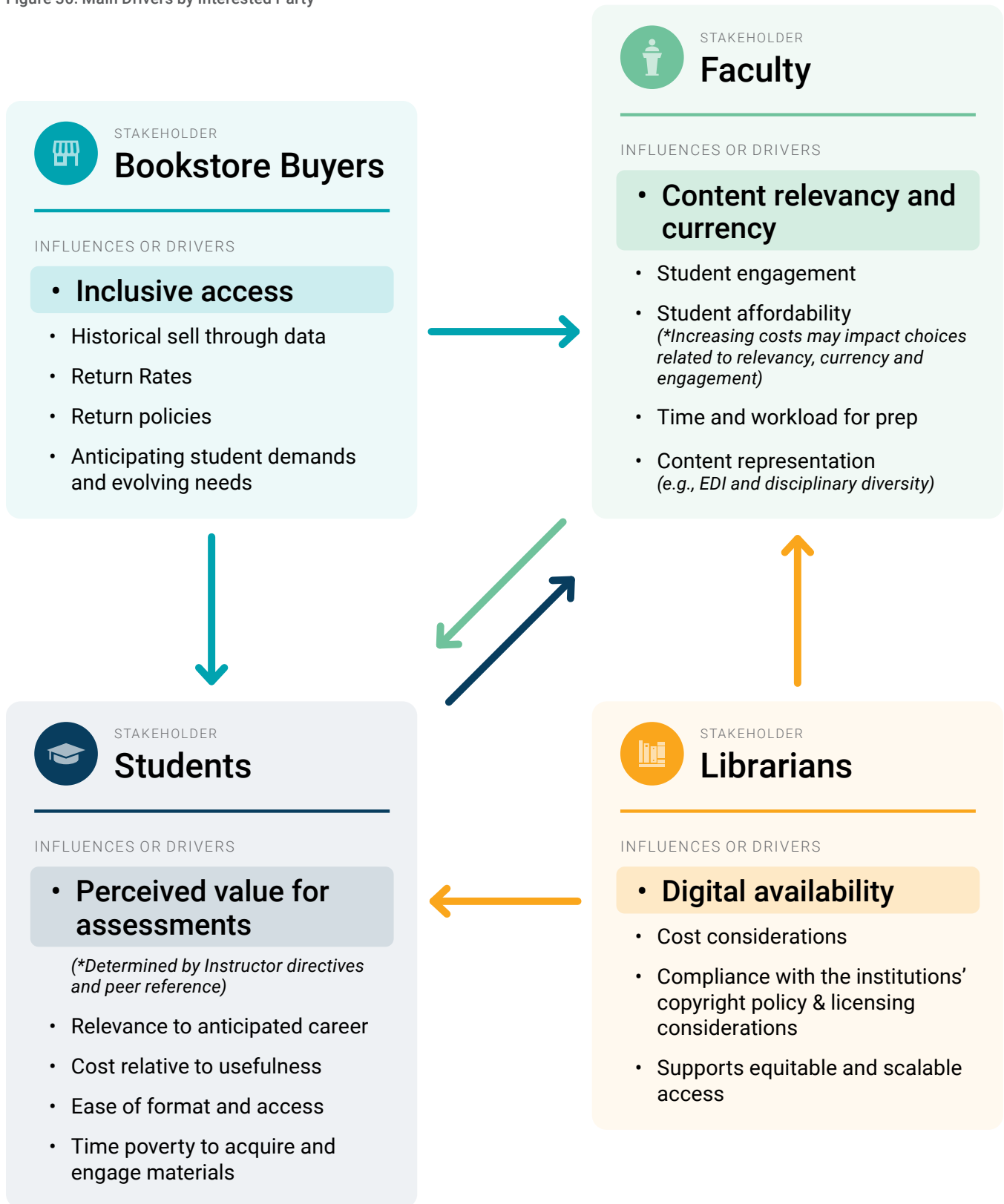
The current pressures facing Canadian course material publishers are not the product of any single driver or influence, but of several interconnected dynamics that compound one another at every step of the decision chain. When a faculty member, responding to student affordability or engagement concerns, opts for an OER instead of a commercial text, for example, that decision also reduces the signal students receive about the value of purchasing, which in turn reduces sell-through at the campus store, which narrows the bookstore’s confidence in ordering, which further limits student access to materials that might otherwise have been adopted. No single actor in the chain is behaving unreasonably, but each is now responding rationally to the trending pressures they face. However, the cumulative effect of these drivers is a market that is becoming structurally harder to operate in. The challenge facing publishers today is not simply that students are price-sensitive, or that digital formats have proliferated, or that free alternatives have become much more available. Rather, it is that all of these forces are operating simultaneously, and they are reinforcing each other in ways that make any single-point intervention insufficient.

This matters for how publishers think about responding. Addressing affordability alone does not resolve the relevance problem. Improving design or format does not fix the distribution chain. Faster publication timelines do not on their own build faculty adoption. Investing in supplemental or courseware materials does not help if generative AI can replicate those materials on demand. Producing more modular, updatable content does not overcome student disengagement if instructors are not designing assessments that require students to actually use it.

What the findings suggest instead is the need for a coordinated, multi-pronged approach that recognizes instructor behaviour as the most powerful point of intervention, but understands that instructors themselves are responding to student engagement pressures, time constraints, and the growing availability of free alternatives that publishers will also need to address. The recommendations that follow are offered in that spirit: not as isolated fixes as the adoption of any one in isolation is likely to generate limited and disappointing returns. They are considered as mutually reinforcing opportunities that, taken together, target the points in the chain where changing the signal changes the outcome.



Figure 30: Main Drivers by Interested Party



# 4. Recommendations

## 4.1 Faculty Support and Enablement Recommendations

Feasibility  
Impact



### 4.1.1 Equip faculty with information about the value of the course material to students

Across bookstore interviews, a consistent finding was that students purchase materials when assignments require direct engagement with the text. Publishers and faculty who design courses with book-dependent assessment reported that this significantly improves adoption and sell-through. Faculty can benefit from assistance in delivering messages about the usefulness and benefits of acquiring course materials. Provide faculty with ready-to-use framing to help students understand why the course materials are important, emphasizing how they contribute to professional preparation, or provide other means of amplifying this form of communication.

This builds on existing publisher-faculty relationships and requires no new infrastructure. It targets the most consistent finding in the research: students purchase when instructors clearly signal why materials matter.

Feasibility  
Impact



### 4.1.2 Build Communities of Practice to Support Course Material Selection

New instructors need support and community when navigating course material options. Many faculty reported being introduced only to discipline-specific ideas without broader understanding of how colleagues across their institution use materials effectively, a gap instructors felt publishers could help fill. Publishers should facilitate communities where instructors can share best practices, understand the full spectrum of available options, and make more informed curation decisions that advance course success.

ACP's existing publisher network provides the organizational foundation this would require, though participation will likely vary by member size. The documented isolation of new and sessional faculty from both publisher resources and peer practice represents a gap currently unaddressed by any actor in the adoption chain.

Feasibility  
Impact



### 4.1.3 Communicate value of course materials directly to students

Students communicate with each other frequently about the value of texts for courses, though they may be left to themselves individually or as a group to identify what those key characteristics of value are. Do not assume pedagogical benefits are self-evident. Find ways to communicate directly with students (on potential, institutional, community or social media platforms) about how course materials will support their success in the course.

The investment is shareable across ACP members, which improves feasibility. Instructor signals and peer networks remain the primary drivers of student purchasing; direct publisher-to-student communication works best as reinforcement of those channels rather than a substitute for them.



Feasibility ●●○  
Impact ●○○

#### 4.1.4 Build bridges with librarians to support material adoption in courses

Librarians are a vital knowledge source that can support instructors in identifying resources that are not as immediately obvious to faculty (whether through advertisement or publisher representatives). Librarians can be vital allies supporting instructors in finding course materials that meet their course objectives and ensuring instructors are aware of publisher offerings. Work with librarians to socialize the availability of options and features of publisher catalogues with explicit links to courses delivered at the institution.

The outreach investment is modest relative to other recommendations. Librarians are increasingly reactive rather than embedded in course selection, which limits their downstream influence on adoption. The opportunity is narrow but may provide some downstream effects.

### 4.2 Content and Pedagogy Recommendations

Feasibility ●●●  
Impact ●●●

#### 4.2.1. Invest in new forms of supplemental materials that accompany course materials

The development of generative artificial intelligence means that traditional supplemental materials, such as slides and test banks are no longer as high value. If a text is being developed with supplemental materials, focus on interactive tools and materials that enhance teaching and cannot be easily replaced by generative artificial intelligence.

The feasibility of this shift is stronger than it may appear, as GenAI has eroded the supplemental advantage of large commercial publishers, creating a more level playing field for ACP members to invest competitively. The impact follows a similar shift, as faculty are actively seeking interactive, pedagogically irreplaceable tools as traditional test banks and slide decks lose their value proposition.

Feasibility ●●○  
Impact ●●●

#### 4.2.2 Lead on AI Integration in Course Materials

Instructors understand that students will inevitably need to engage with AI in their daily lives. While many students are reluctant because of strict institutional or course policies on AI use, most interviewees noted AI was a tool to be used but used responsibly. Develop resources that help understand AI's capabilities and limitations, engage critically with AI outputs, and use AI in ways that demonstrate academic integrity within different disciplinary contexts.

ACP's national network is positioned to pool expertise and produce AI course content collectively that no single publisher could develop alone. The impact of moving in this direction is more considerable, as demand is acute in fast-moving disciplines where faculty cite the absence of relevant AI content as a direct barrier to adopting publisher materials.

Feasibility ●○○  
Impact ●●●

#### 4.2.3 Develop modular content repositories that update regularly

Invest in platforms comprised of curated libraries of case studies, simulations, and short-form content (such as chapters and articles) that instructors can piece together for their courses. The formats meet instructor demand for concision and flexibility and the case studies and simulations address student preference for material they perceive as directly related to their professional futures.



This requires a fundamental shift in production and author models, which constitutes a significant structural commitment, particularly for smaller publishers. For those able to make it, the case rests on a direct match between what this model produces and what faculty have consistently asked for: concise, updatable, flexible content that OER cannot reliably deliver with Canadian currency and editorial quality.

Feasibility



Impact



#### ***4.2.4 Design Content that mirrors the pedagogical shift towards reflexive thinking and learning***

As a part of the desired shift away from content and towards skill development, design content that teaches students to navigate ideological spectrums, question information sources, and engage reflexively with media and question the content instead of allowing for passive consumption.

The strongest adoption signal sits in arts, humanities, and social sciences, making a targeted disciplinary investment more achievable than a system-wide rollout. approaches, may offer a compounding impact. At the same time, AI is accelerating a broader shift away from traditional assessment toward critical and reflexive learning across all disciplines and making this investment more than just a humanities play.

Feasibility



Impact



#### ***4.2.5 Maximize navigational design elements in course materials to help students with intellectual wayfinding and therefore engagement***

Maximizing attractive design elements in text, including more break-out boxes, short chapters, colour-coding chapters, images, write-in exercises for integrated reflection, all enhance students' perception of the value of a text, which in turn improves likelihood of purchase and use.

This is among the most accessible recommendations to act on: a low-cost enhancement to existing production workflows, applicable to both print and digital. Students consistently link ease of navigation and study support to perceived value, and perceived value is a direct driver of purchase decisions.

### **4.3 Access and Distribution Models Recommendations**

Feasibility



Impact



#### ***4.3.1 Advocate the Expansion of Inclusive Access Program at Institutions***

Investing in advancing inclusive access programs directly addresses student time poverty and financial barriers, two important impediments to student engagement in courses. Publishers should work with institutional representatives to remove barriers to the implementation of inclusive access programs to support access to assigned class materials and student success.

The path forward here requires sustained advocacy: structural and regulatory barriers exist at many institutions, and active opposition from some student groups limits the pace of expansion publishers can drive. Where inclusive access programs have taken hold, they have improved both student access and sell-through. That said, publishers can only do so much on their own given the institutional constraints that remain.



Feasibility ●●○  
Impact ●●●

#### 4.3.2 De-incentivize rental models as an alternative to purchasing

Interviewees revealed few benefits to rental models. Students find the savings compared to buying meager, indicating that they sometimes would like to be able to keep the material for longer than the rental period. They also indicate that they would likely buy if the book was not available for rent, meaning campus stores are losing out on potential revenue. While rental programs may have had a benefit at one point in time, the perception of their value has significantly eroded.

Publisher and campus store alignment is required, and some stores continue to position rentals as a student-service offering. Survey data, however, shows the majority of renters would have purchased instead, making this one of the most evidence-backed revenue recovery opportunities in the report.

Feasibility ●●●  
Impact ●●●

#### 4.3.2 Offer generous return policies. Simplify Return Policies and Coordinate them Among Publishers to Support Sell Through

Campus store interviewees who stock physical books want inventory to move as much as publishers do. However, the risk of over ordering sometimes outweighs the risk of losing a few sales due to underordering. This aligns with findings from BookNet's State of Publishing, which stated that "When we asked publishers which changes either company- or industry-wide would have the greatest impact in increasing coordination for all returns across supply chain partners they chose standardizing return policies (50%) and bookseller accountability (50%)"<sup>xv</sup>. Predictable and easier returns reduce bookstore risk and encourage more aggressive purchasing that supports student access. Within this review, publishers could consider bundling shipping and return charges into title pricing to reduce bookstore friction.

The coordination required sits squarely within ACP's mandate, and bookseller demand for standardized return policies is already established in BookNet Canada research. Reducing return risk addresses the conservative ordering behaviour that simultaneously suppresses publisher revenues and limits student access – the same problem from two directions.

Feasibility ●○○  
Impact ●●○

#### 4.3.3 Collaborate and consolidate technical infrastructure to make access to platforms of member organizations universal for associations to reduce access friction

To counter student frustration with platform proliferation to access course materials, advocate for consolidation of technical infrastructure (and/or publisher platforms) that can make access to several publishers' online materials together and reduce costs of operation. Help to reduce the number of logins, portals and access points students must navigate to obtain course materials.

Multi-publisher coordination and shared infrastructure investment are both required, and no strong association-led mandate currently exists to drive them. The impact is incremental: platform consolidation reduces friction for students already committed to purchasing, but it does not address the instructor signals and perceived value gaps that determine whether students purchase at all.



Feasibility



Impact



#### 4.3.3 *Where possible, accelerate publication timelines.*

Invest in processes that reduce time from manuscript to market, prioritizing disciplines where currency of content is a primary adoption driver. Because publishers compete with free resources that are produced in large quantities and in quick volume (such as through serials and free internet platforms), publishing material faster are essential to maintain relevance.

While this recommendation may not immediately change the market dynamics, it is necessary to compete with more immediately generate content, and publisher cycles may not keep pace with rapidly evolving disciplines, and modular content strategies may offer a faster parallel path to the same outcome.



# Appendix A: Survey Respondent Profile

HESA conducted a survey of students. The students were recruited through SAGO, a panel company which pays Canadians to take online surveys. 454 students completed the survey, although not all students were asked or chose to answer all questions. Survey logic was used to ensure students were only asked questions relevant to their circumstances, so not all questions were asked of all students.

The respondents were predominantly university students, and they were spread across all years of study.

Figure A1: Type of institution attended

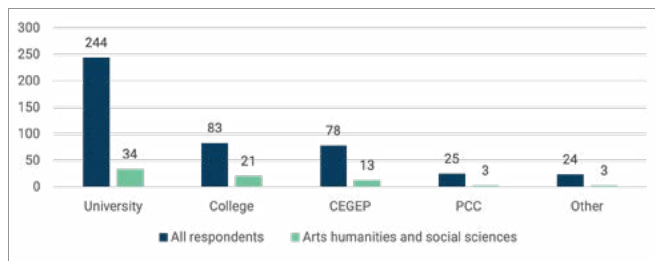
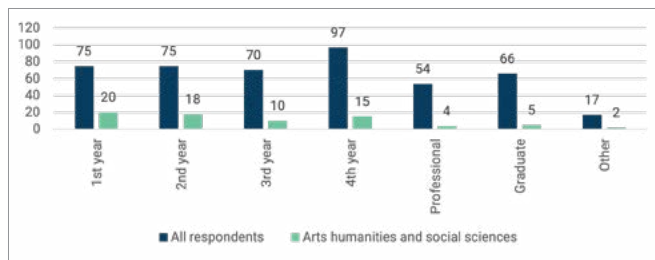
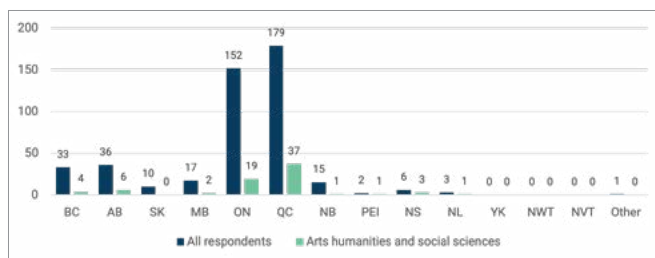


Figure A2: Current year of study



While all provinces were represented, most respondents were from Ontario and Quebec.

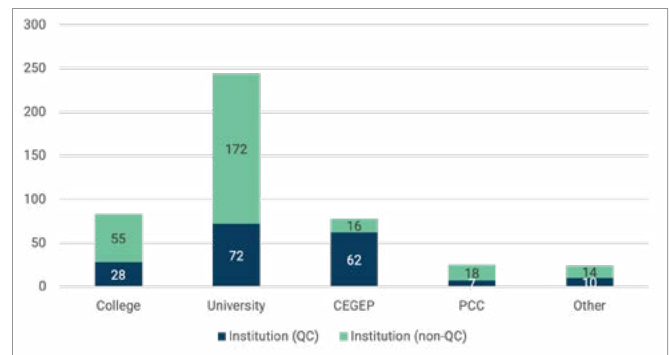
Figure A3: Province or territory in which respondent's institution is located



Students from Quebec were significantly over-represented relative to both their share of Canada's overall student population and the proportion of Quebec residents in the panel. For reference, the underlying panel draws 40% of respondents from Ontario and 14% from Quebec<sup>20</sup>. Since the survey was delivered in English, a minority language in Quebec, this is surprising.

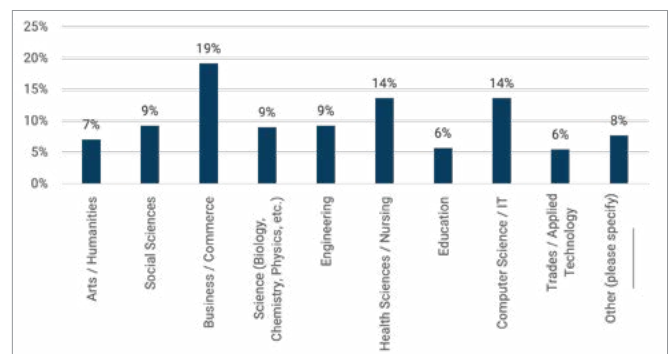
Further analysis reveals that Quebec respondents were disproportionately from colleges and CEGEPs, with 90 of 179 Quebec respondents (50%) attending colleges or CEGEPs.

Figure A4: Institutions attended, Quebec versus other provinces and territories



Respondents were not prescreened by field of study, but the distribution is reasonably similar to the distribution of students by field across Canada. The Association of Canadian Publishers' members tend to emphasize arts, humanities and social sciences, and as noted 16% of respondents (74 individuals) fell into that category.

Figure A5: Primary field of study (n=454) and territories



# Endnotes

1. Because BMG adds schools and adoptions over time, a summary of aggregate patterns risks being misleading. Creating relationships between the enrolment pool and the titles is a more reliable way to paint a portrait of trends. Some figures derived from BMG data in this report should therefore be read as indicative of directional patterns within the dataset rather than precise market-wide statistics. Where possible, we control for dataset coverage changes by comparing ratios or proportions rather than absolute counts.

2. The survey is focused on how and why students decide to acquire course materials. The sample is not a probability sample and should not be interpreted as representative of the Canadian student population. The aim was to explore why students choose not to buy or rent required course materials. It provides useful directional evidence on purchasing behaviours and perceptions, particularly when corroborated by our qualitative findings.

3. As institutions adjust to the downstream impacts of fewer international students coming to study in Canada, it appears that many contract faculty positions are disappearing, though no report studying the quantitative shift in contract faculty numbers since this change in policy exists.

4. As per the Association of Canadian Publishers' website, eligibility criteria are: Has its head office of business in Canada; Is a Canadian-owned and -controlled corporation; Has its managerial, editorial, and financial decisions made by Canadians; Is a professional book publishing firm; Publishes original books by Canadian creators\*\* as a dedicated and ongoing part of its business; Has in print no fewer than four (4) original titles by Canadian creators, no more than 25% of which are authored by principals or directors of the firm; Has produced in the twelve-month period prior to its application for membership, and in each subsequent calendar year, no fewer than two (2) new original titles by Canadian creators; Has been in operation for at least two years from the date of publication of its first original Canadian title; Subscribes to and is willing to work on behalf of the purposes and objectives of ACP. For more details, please consult: <https://publishers.ca/join/>

5. "Respondents in the arts, humanities and social sciences" refers only to those whose primary program of study is in the arts, humanities, or social sciences. It excludes students declared in other programs who nonetheless take courses in these disciplines.

6. This 2023 article by Colleen Flaherty is one example of grappling with the benefits and drawbacks of such programs: Flaherty, C. (2023, May 3). New course materials models: Who benefits? *Inside Higher Ed*. <https://www.insidehighered.com/news/student-success/academic-life/2023/05/03/survey-costs-course-materials-top-college-student>

7. UC Davis Stores. (2023). *Equitable access: 2022–23 impact report*. University of California, Davis. <https://ucdavisstores.com/StoreFiles/143-SchoolFiles/143-pdf/143-ea-2022-23-impact-report-v8-web-email.pdf>

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20. This would not necessarily hold for student members of the panel.

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