



A RESEARCH REPORT BY BOOKNET CANADA

# **BNC** **RESEARCH** 12.2014

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Canada Reads:  
Congratulations  
nominees!  
What happens now?  
What if you win?



**BOOKNET**  
**CANADA**

PREPARED BY BNC STAFF

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## SUMMARY

CBC's Canada Reads literary contest is highly publicized and widely followed. Its debate-style format and interactive components make it popular with the public. To get a sense of what to expect during the upcoming Canada Reads season, and to help publishers with stock and demand planning, we've created a trend analysis of last year's shortlist and winner as well as a comparison in sales and stock position for the winners from every year between 2006 and 2014. Our research shows that interesting sales patterns follow the debates and the extensive media (including social media) coverage that goes along with this contest. This study includes:

- Week-over-week comparison of volume sold for all nominees.
  - Stock position by week – How many units were on hand during the Canada Reads season?
  - On-order position by week – When do orders rise and fall, and by how much?
  - Market trends by week, and percentage of market share for the nominated titles.
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## APPROACH

The first section of this study compares the 2014 Canada Reads nominees by volume sold and includes a look at the overall fiction market sales during this time. The comparison by volume sold helps us understand how the award affects consumer behaviour, and how it relates to the rise and fall of the fiction market as a whole.

Next, we look at the 2014 nominated titles individually, showing volume sold, units on hand, units on order, and the average actual selling price throughout the Canada Reads timeline. This shows us the retail demand and how retailers are predicting sales, especially during the holiday season.

Finally, the year-over-year comparison looks at the winners from 2006 to 2014, showing the impact of the competition over time and noting similarities and special cases. The volume sold comparison shows how the competition is reaching readers, on-hand numbers show how retailers are predicting sales, and on-order information shows the retail demand.

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## INTRODUCTION

To the Canada Reads nominees and their publishers: cheers to you and to the Canadians who love to read! Excitement and anticipation abound at the prospect of getting into the ring and debating, but with this free pass to endorsement, publicity, and a national broadcast come questions and planning. You need to know how your nomination may affect orders, whether you need to reprint, and what to do if you win. BNC SalesData is here to help with the process.

This report was created exclusively for the publishers of the nominees. This information is put together with the hope that it will lead your house, authors, booksellers, and publicity and marketing directors in the right direction.

## CAVEATS

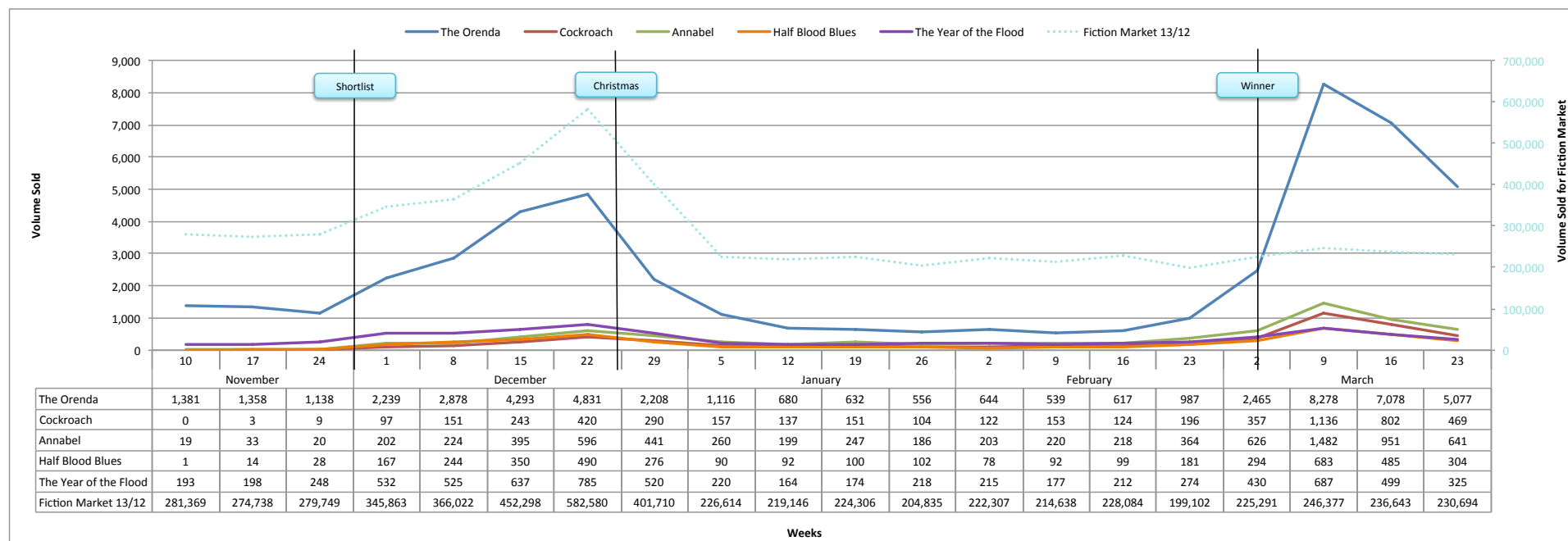
Based on publisher feedback, we estimate that BNC SalesData represents 85% of book industry sales. Certain retail categories are not completely covered by our retail panel, and this should be noted in any interpretation of these results, as the effect of certain awards may not be fully captured in our data. These retail categories include:

- Independent bookstores: BNC SalesData includes many major independent bookstores, but does not include many smaller ones, any of which could be actively promoting an award winner. It also does not capture many specialty independent bookstores (children's books, science-fiction, etc.) where a genre- or subject-specific award may have more impact. However, we are able to detect even the slightest variation in sales in our independent panel, so we are confident that sales changes in the independent market are well represented.
  - K-12 and higher-education sales: our panel does not include direct institutional sales to schools or college/university textbook sales.
  - New booksellers have begun contributing to BNC SalesData since our first literary awards study, conducted in October 2006. Some changes seen in year-over-year sales figures may be due to the increased number of stores reporting sales, rather than a true increase in overall sales.
  - At this time, ebook sales are not represented in BNC's data. Therefore, all numbers in this report refer to print books only.
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# CBC CANADA READS 2014

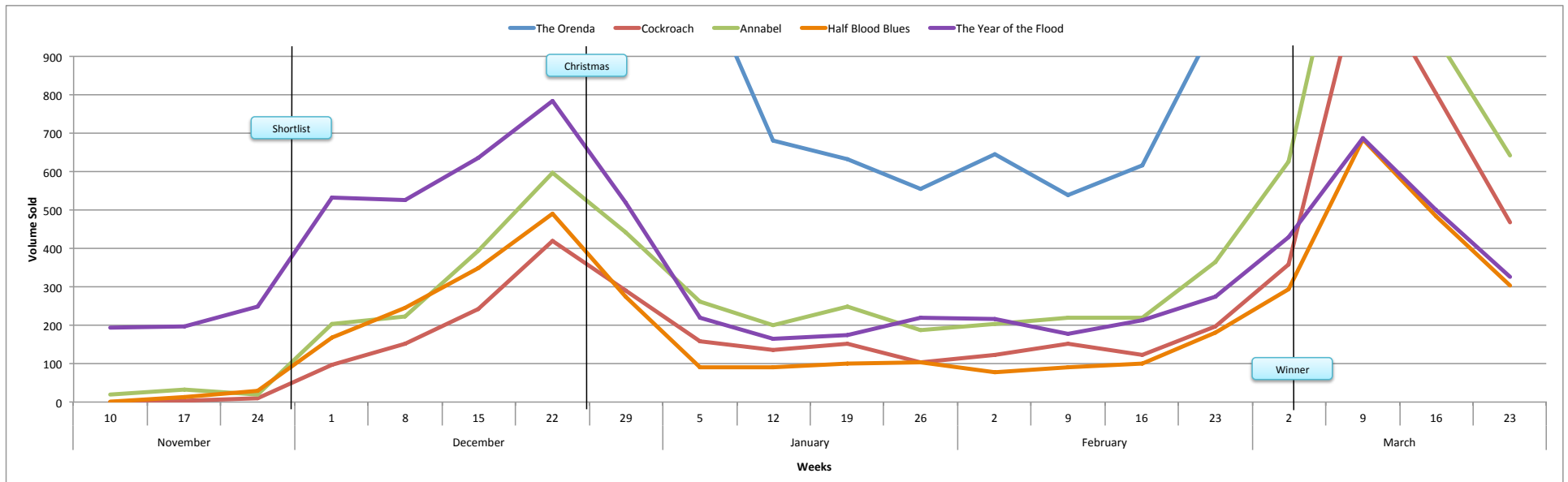
Organized by the CBC

## Volume Sold



This graph represents the volume sold for each nominated title over a twenty-week period centered on the Canada Reads season. The dotted line shows the volume sold of all titles in the fiction market during this time period. The left axis represents the number of units sold by each specific title, while the right axis shows the total volume of fiction sales within the market for the same period. This graph aims to provide insight into the Canada Reads nominees' market share over the award season by comparing their sales with overall market sales.

## Volume Sold - Expanded View



The figures on the next page demonstrate the influence of the Canada Reads program on Canadian book sales. All calculations are based on sales data from the week before and the week of the announcement.

**Shortlist announcement**

- The nominated titles saw an average increase in sales of 519% during the week following the shortlist announcement. These sales continued to increase by 94% on average from the nominee announcement until Christmas. This increase is in line with the normal Christmas sales increase for the market as a whole.

**Winner announcement**

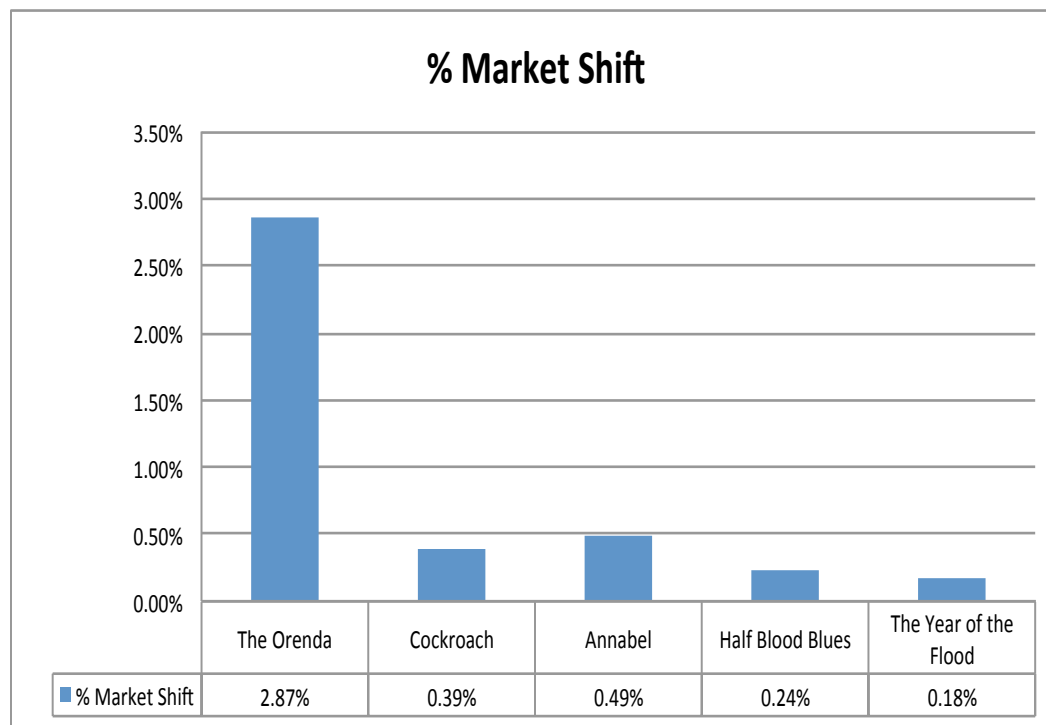
- **Nominees:** Sales remained fairly level for all nominees between Christmas and the debate week in February. During the week of the debates and winner announcement, sales for all nominated titles increased by an average of 137% compared to figures from the previous week.
  - **Winner:** Debate week sales for the winning title were more than double the sales of the previous week. Nominee sales also spiked during the debate week, but the winning title continued to enjoy above-average sales for several weeks, while sales of the other nominated titles quickly returned to pre-debate-week levels.
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## 2014 NOMINEES

### Market Share Shift

This bar graph compares the shift in market share during debate week for all nominees, and helps us see whether there is a connection between sales and the order a title was voted off in the debates.

Percent of market share during debate week was compared with a baseline market share from five weeks earlier to calculate the shift each title saw during debate week. *The Year of the Flood* was voted off on day one, *Half Blood Blues* was voted off on day two, and *Annabel* was voted off on the last day of debate. *Cockroach* was narrowly edged out by a vote of 3 to 2 on the final day, leaving *The Orenda* the 2013 winner.



As the graph illustrates, this year's competition showed a close correlation between rank in the competition and market share shift. The overall victor, *The Orenda*, was also the winner of the Canada Reads People's Choice Award with 58% of the total vote, and experienced the largest market shift percentage. Yet the third title to be eliminated, *Annabel*, had the second highest market shift percentage and was placed second in the People's Choice voting. With the exception of *Half Blood Blues* and *The Year of the Flood*, there is a notable correlation between nominees' market shift percentage and the People's Choice ranking. Perhaps both voter popularity as well as previous nominations play a significant role, as *The Orenda* was also nominated for the 2013 Giller Prize.

The following graphs take a closer look at sales, on-hand, and on-order information for the individual nominees.

Nominee: Margaret Atwood

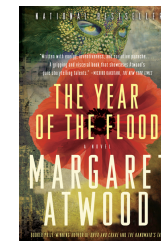
## THE YEAR OF THE FLOOD

RANDOM HOUSE OF CANADA

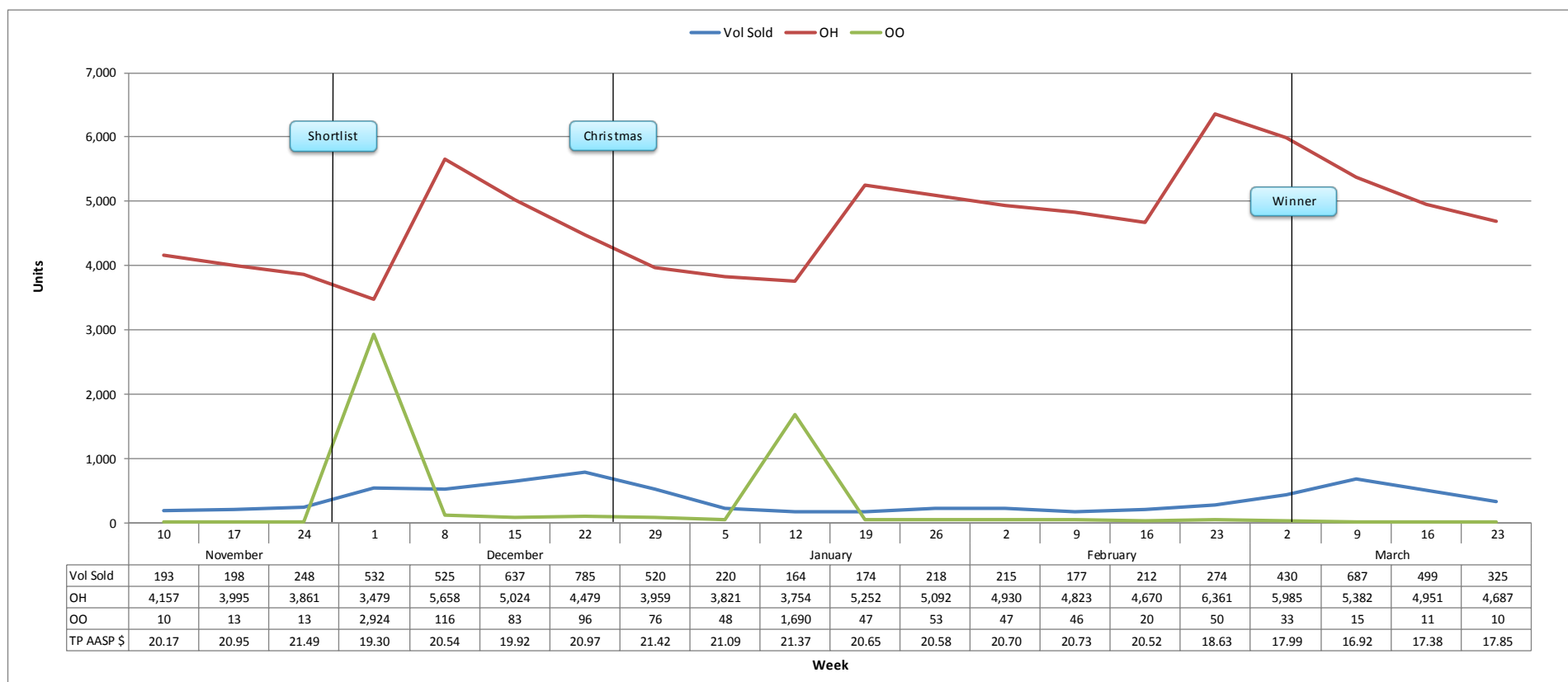
TRADE PAPERBACK

978-0307397980

\$22.00



Sales vs. On Hand vs. On Order



Nominee: Esi Edugyan

## HALF BLOOD BLUES

HARPERCOLLINS PUBLISHERS LTD.

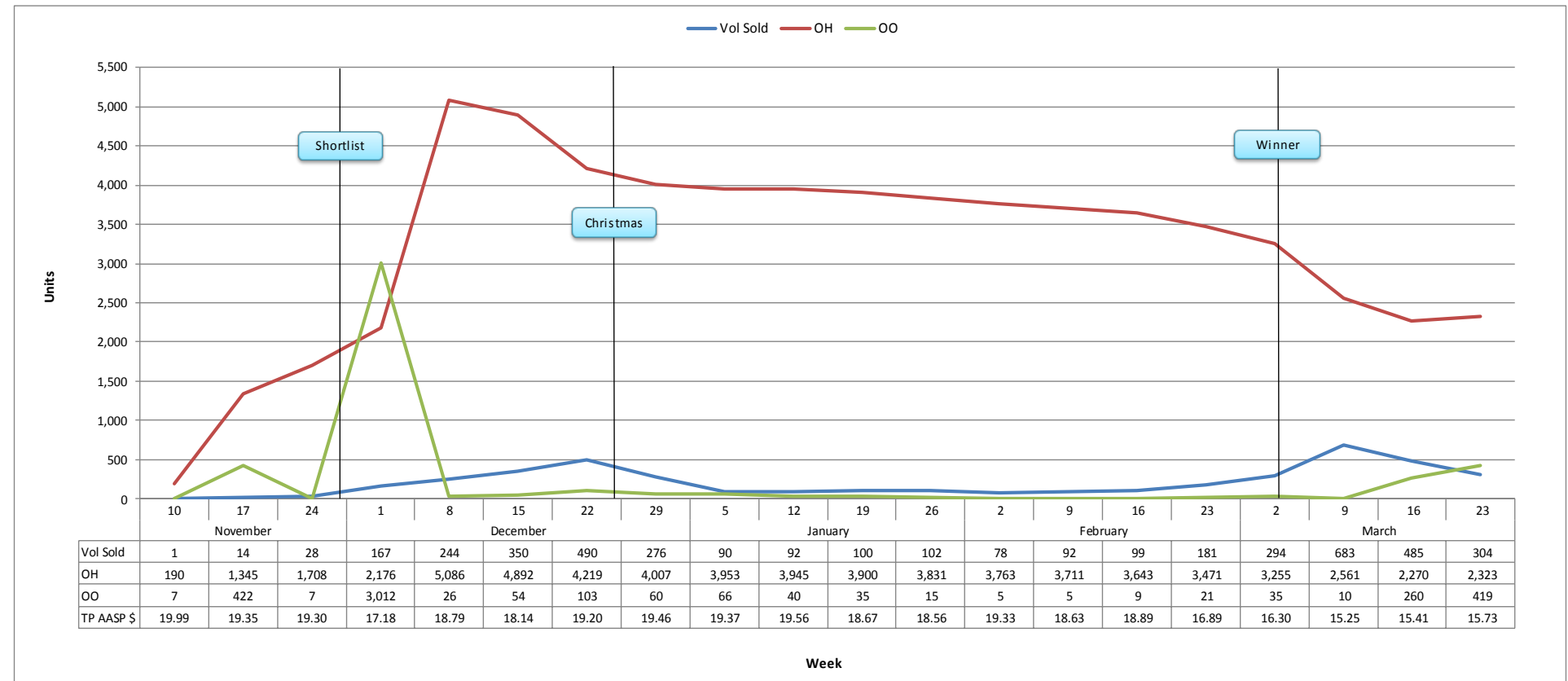
TRADE PAPERBACK

978-1443433471

\$19.99



Sales vs. On Hand vs. On Order



Nominee: Kathleen Winter

**ANNABEL**

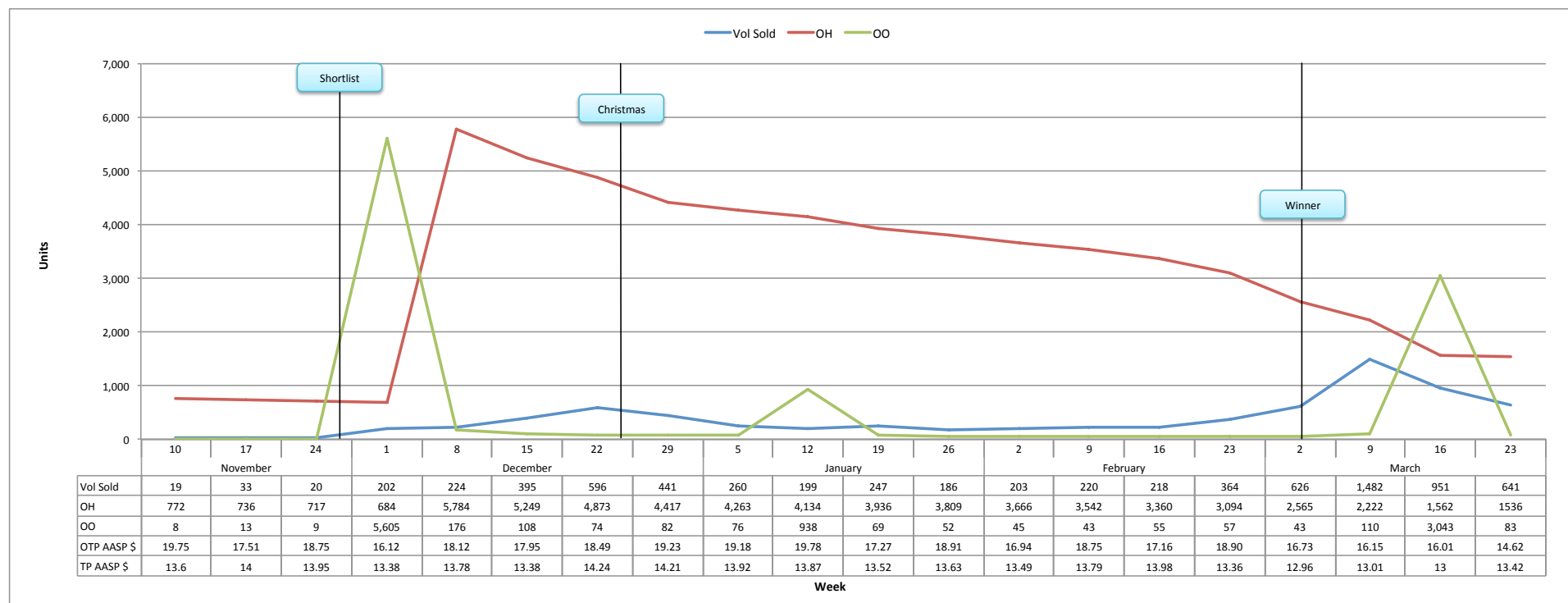
Sales vs. On Hand vs. On Order

HOUSE OF ANANSI PRESS

ORIGINAL TRADE PAPERBACK – 978-0887842900

TRADE PAPERBACK – 978-1770893344

\$19.95



\*Data from both the original trade and trade paperback editions were combined for the totals used in the graph above.

Nominee: Rawi Hage

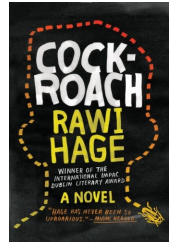
**COCKROACH**

HOUSE OF ANANSI PRESS

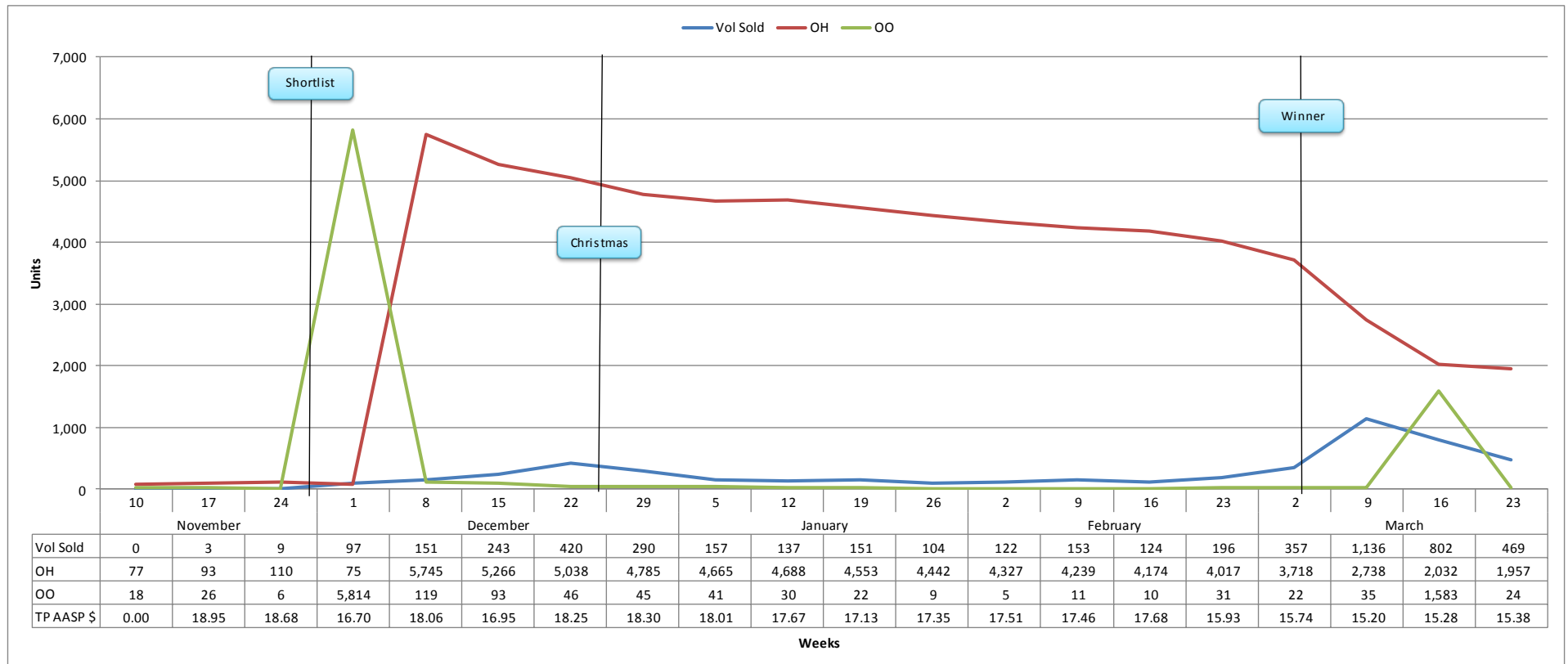
TRADE PAPERBACK

978-0887848346

\$18.95



Sales vs. On Hand vs. On Order

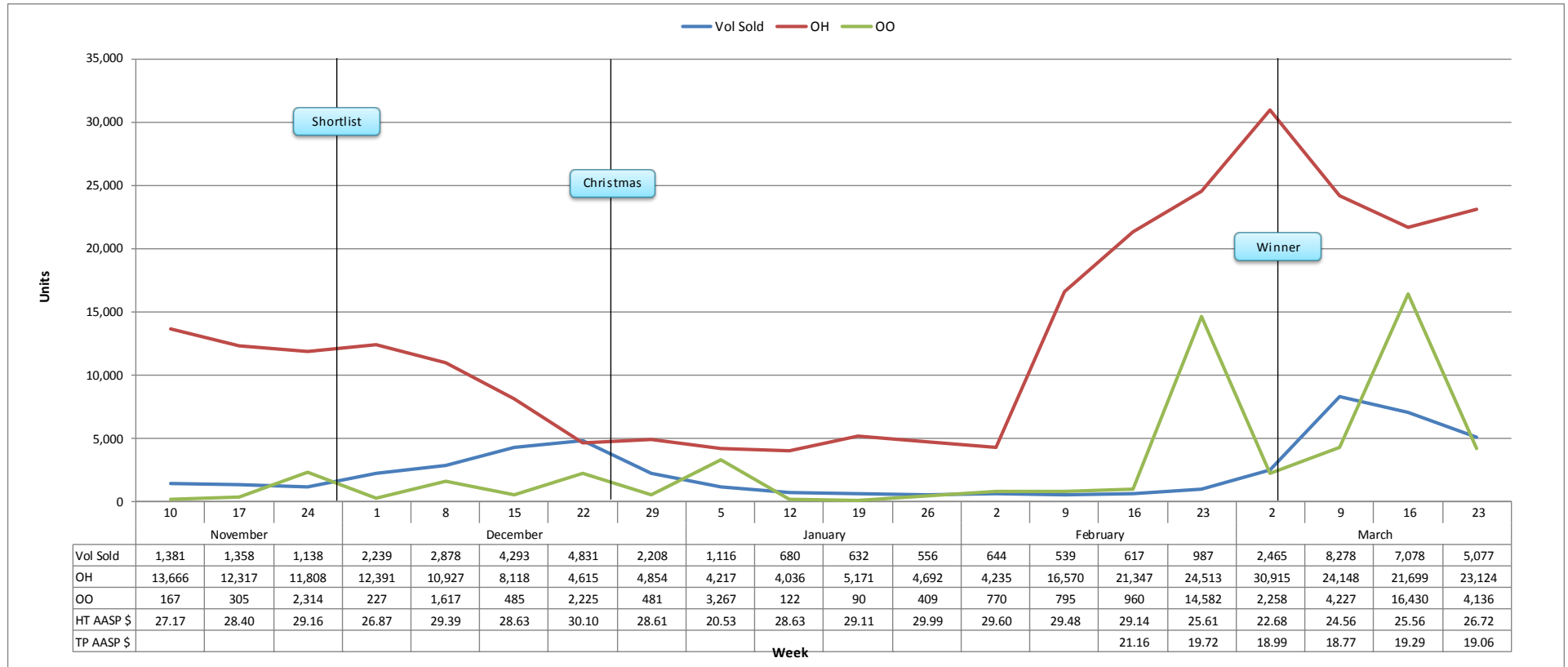
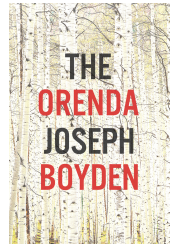


Winner: Joseph Boyden

## THE ORENDA

Sales vs. On Hand vs. On Order

PENGUIN GROUP (CANADA)  
 HARDCOVER TRADE – 978-0670064182  
 TRADE PAPERBACK – 978-0143174165  
 \$32.00/\$22.00



\*Data from both the hardcover trade and trade paperback editions were combined for the totals used in the graph above.

## WINNER COMPARISON 2006-2014

### 2014\*

Joseph Boyden's *The Orenda*  
 PENGUIN GROUP (CANADA)  
 HARDCOVER TRADE | 9780670064182 | \$32.00  
 TRADE PAPERBACK | 9780143174165 | \$22.00

### 2013\*

Lisa Moore's *February*  
 HOUSE OF ANANSI PRESS INC  
 TRADE PAPERBACK | 9780887849626 | \$19.95

### 2012\*

Carmen Aguirre's *Something Fierce*  
 DOUGLAS & MCINTYRE  
 HARDCOVER TRADE | 9781553654629 | \$32.95  
 TRADE PAPERBACK | 9781771000369 | \$21.00

### 2011\*

Terry Fallis' *The Best Laid Plans*  
 McCLELLAND & STEWART  
 TRADE PAPERBACK | 9780771047589 | \$19.99

### 2010

Nicolas Dickner's *Nikolski*  
 RANDOM HOUSE OF CANADA  
 TRADE PAPERBACK | 9780676978803 | \$19.95

### 2009

Lawrence Hill's *The Book of Negroes*  
 HARPERCOLLINS PUBLISHERS  
 TRADE PAPERBACK | 9781554681563 | \$24.95

### 2008

Paul Quarrington's *King Leary*  
 DOUBLEDAY CANADA  
 TRADE PAPERBACK | 9780385666015 | \$19.95

### 2007

Heather O'Neill's *Lullabies for Little Criminals*  
 HARPERCOLLINS PUBLISHERS  
 TRADE PAPERBACK | 9780060875077 | \$17.50

### 2006

Miriam Toews' *A Complicated Kindness*  
 KNOPF CANADA  
 TRADE PAPERBACK | 9780676976137 | \$22.00

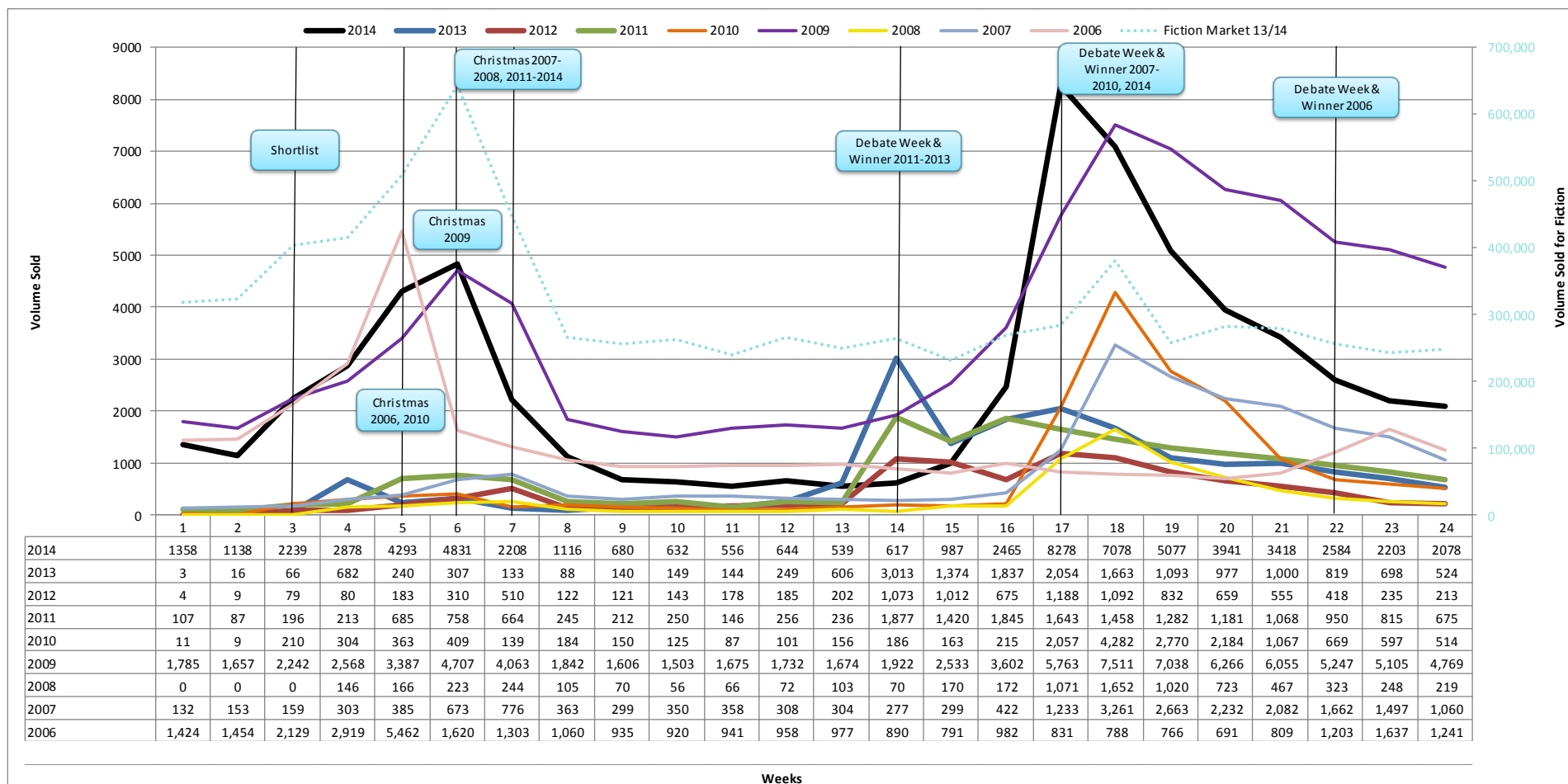
Sales trends for Canada Reads winners are comparable year over year. Sales increase when the shortlist is announced, increase again at Christmas, and level out between Christmas and debate week, followed by another increase during debate week. A spike occurs during the debate week and the week following the winner announcement.

It is interesting to note that 2014 is the fourth year that the program has allowed the public to submit nominees and vote in polls for their favourite books; this public campaign resulted in a top-10 list from which the panelists chose the titles they would defend. Some trends emerge if we compare sales between viewer voting and non-voting years:

- The sales volume for the winning title over a comparable 24-week period was higher in non-voting years than voting years.
- However, the volume of sales for all shortlisted titles over a comparable 24-week period was higher in voting years than non-voting years.

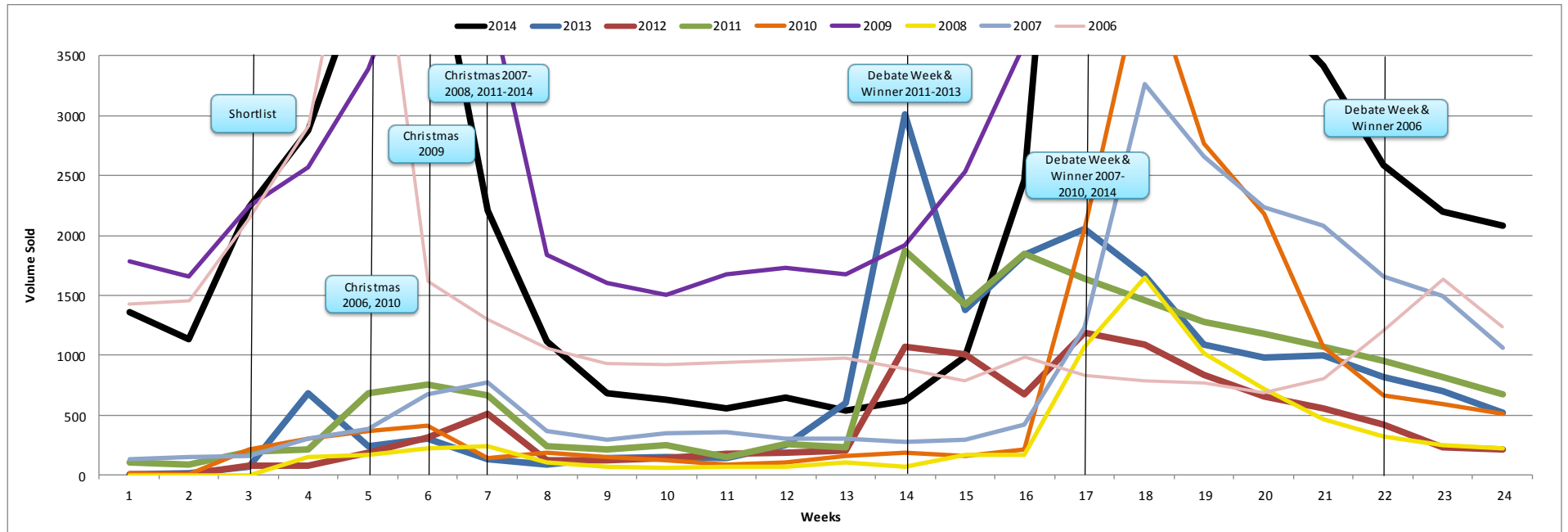
\* The program allowed the public to submit nominees and vote in polls during this year.

## Winner Comparison - Volume Sold (bold lines represent voting years)



2014: *The Orenda* 2013: *February* 2012: *Something Fierce* 2011: *The Best Laid Plans* 2010: *Nikolski* 2009: *The Book of Negroes* 2008: *King Leary* 2007: *Lullabies for Little Criminals* 2006: *A Complicated*

## Volume Sold - Expanded View



## CONCLUSION

CBC's Canada Reads literary competition has a significant impact on book sales in Canada. By analyzing the sales trends we see each year for the nominated and winning titles, we can fairly conclude that:

- The shortlist announcement has a small but consistent effect on the market share of the nominated titles. Sales increase significantly between the shortlist announcement and the Christmas holidays, both as a result of early publicity for the competition and the normal holiday sales increase in the overall market. Sales then level out between Christmas and debate week.
  - Debate week has a major impact on sales for all nominees, but in most years the nominees who are voted off earlier in the week see less of an impact than those who make it to the last day of debate.
  - Sales of nominated titles spike during the debate week and then drop off rather quickly. Sales of the winning title increase following the debate week and remain high for several weeks.
  - Retailers have taken note of the competition's impact, and are skilled at predicting demand, managing stock, and placing appropriate orders one to three weeks before the debate week.
-