



A RESEARCH REPORT BY BOOKNET CANADA

BNC

RESEARCH 12.2016

Canada Reads:

Congratulations,
nominees!

What happens now?
What if you win?



**BOOKNET
CANADA**

PREPARED BY BNC STAFF

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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 comes 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 Research's literary award studies help Canadian publishers avoid surprises during awards season. By looking at sales data from previous years, we can better predict potential sales and order spikes, giving you the data you need to ensure you have enough copies in the warehouse and on booksellers' shelves.

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 of the 2011 to 2016 winners.

Our research shows that interesting sales patterns follow the debates and the extensive 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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The first section of this study compares the 2016 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 2016 nominated titles individually, showing volume sold, units on hand (OH), and units on order (OO). 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 2011 to 2016, 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.

NOTE:

- All dates used in the graphs represent week-ending dates.
 - BNC calculates percent change based on average units sold three weeks prior to shortlist and winner announcements compared to units sold in the week following each announcement. These calculations are dependent on a given title's availability in the market.
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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 (e.g., 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.

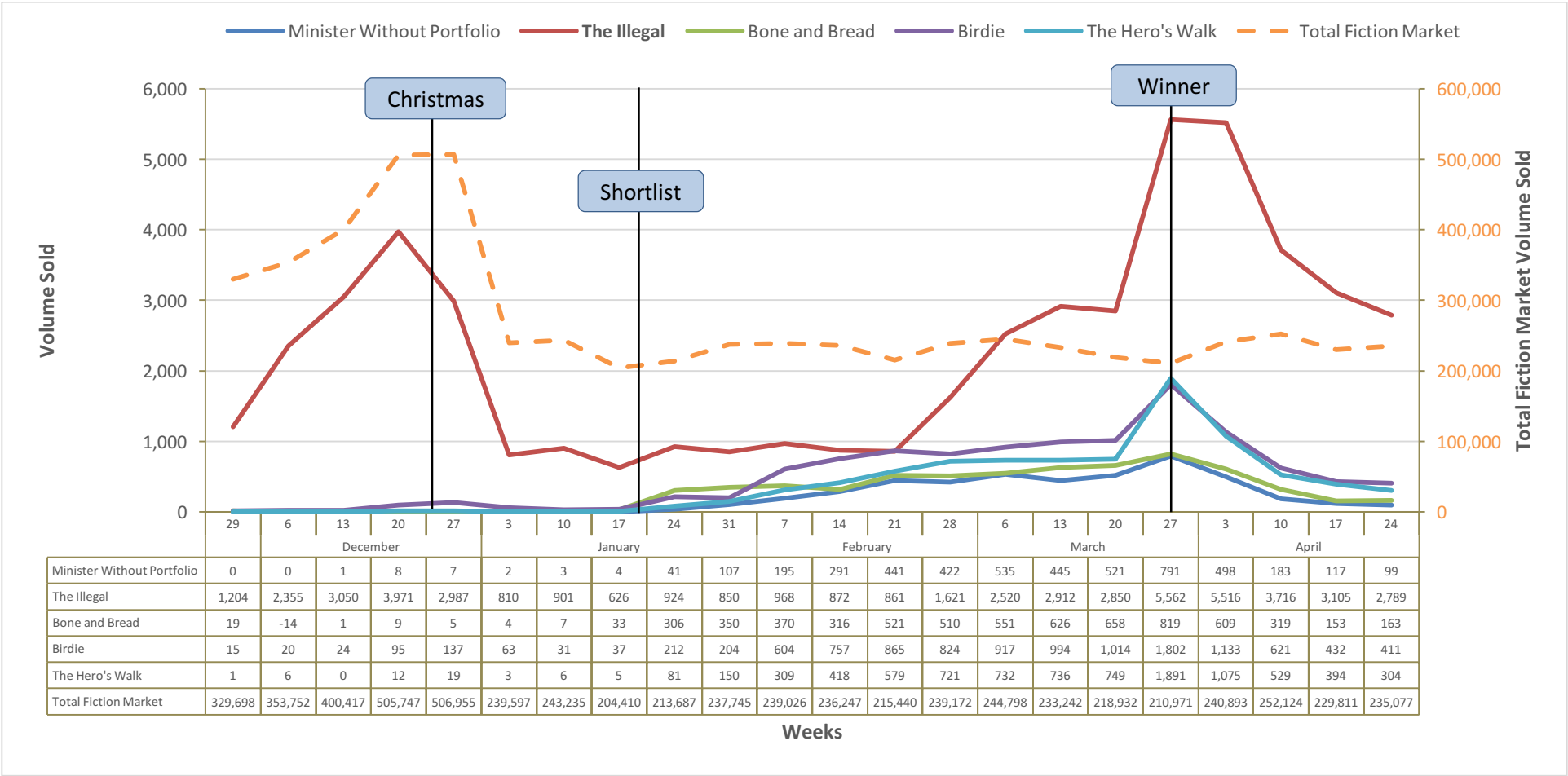
New booksellers have begun contributing to BNC SalesData since our first literary awards study, conducted in October 2006. Some changes seen in year-over-year sales figures may be due to the increased number of stores reporting sales, rather than a true increase in overall sales.

At this time, ebook sales are not represented in BNC's data. Therefore, all numbers in this report refer to print books only.

CBC CANADA READS 2016

ORGANIZED BY THE CBC
NOMINATIONS ANNOUNCED JANUARY 20, 2016
DEBATE WEEK MARCH 21-24, 2016

Volume Sold



Shortlist announcement (January 20, 2016):

- The nominated titles saw an average increase in sales of approximately 1,849% during the week following the shortlist announcement. These sales continued to increase in anticipation of the debate week.
- *Birdie* and *The Hero's Walk* experienced a strong spike in sales during debate week, potentially affected by the order in which the books were voted off – they were eliminated in 3rd and 2nd place respectively.
- *The Hero's Walk* won the 2001 Commonwealth Writers' Prize for the Best Book in Canada & the Caribbean; however, the results of this award were not evident in our analysis, likely due to the length of time that had passed since the receipt of this award.

Winner announcement (March 24, 2016):

- **Nominees:** Sales peaked during the week of the debates and unit sales reflect the order in which titles were eliminated. Titles saw an average increase of 32% in the week following the debate and then sales continued to decline for eliminated titles.
 - **Winner:** Debate-week sales for the winning title, *The Illegal*, were more almost double the sales of the previous week. *The Illegal* experienced a 100% increase in sales following the debate.
 - *The Illegal* sold the most copies post-debate, enjoying above-average sales. *The Illegal* also saw significantly higher sales than the four other titles mid-December, likely influenced by reader anticipation after the acclaim and publicity of his previous novel, *The Book of Negroes*. *The Book of Negroes* was a 2007 Scotiabank Giller Prize Nominee, and won the 2007 Rogers Writers' Trust Fiction Prize, the 2008 Commonwealth Writers' Prize for Best Book Overall, and the 2009 Gustavus Myers Outstanding Book Award. It is also the only novel to win both Canada Reads (2009) and its French counterpart, Le Combat des livres (2013), for *Animata*, the French translation of the novel.
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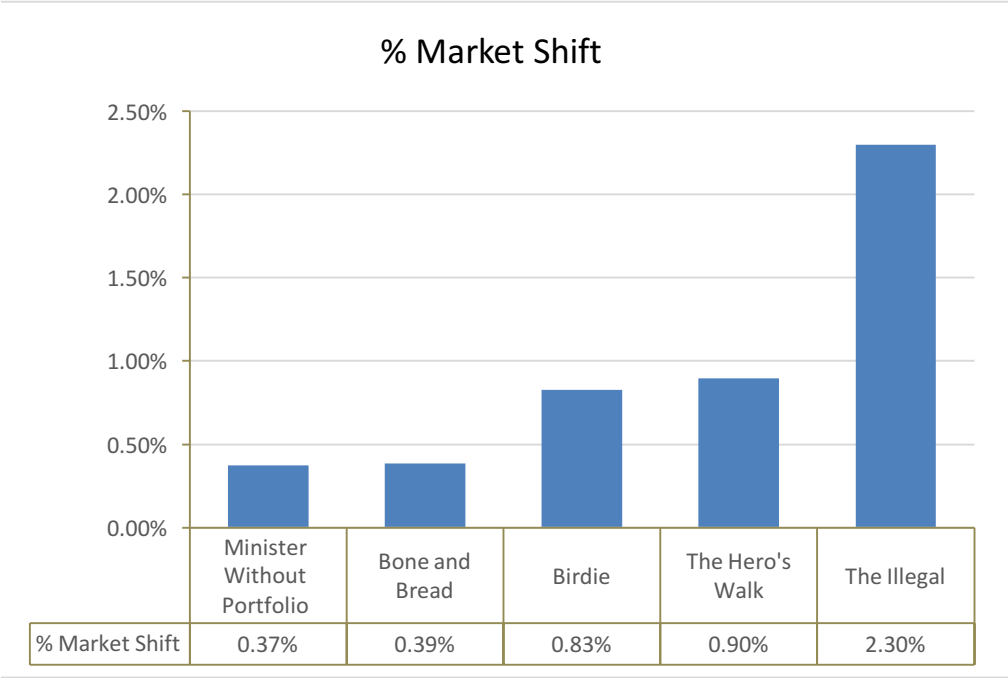
2016 NOMINEES

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. *Minister Without Portfolio* was voted off on day one, *Bone and Bread* was voted off on day two, and *Birdie* was voted off on the last day of debate. *The Hero's Walk* was eliminated by a vote of 3 to 2 on the final day, leaving *The Illegal* the 2016 winner.

This year's competition showed a correlation between a title's rank in the competition and market share shift, with *The Illegal* experiencing the largest market share shift percentage. Interest in this title was likely influenced by reader anticipation after the acclaim and publicity of Lawrence Hill's *The Book of Negroes*, a previous Canada Reads winner that was adapted into a miniseries by the same name, which aired on CBC in 2015.



Nominee

MICHAEL WINTER’S MINISTER WITHOUT PORTFOLIO

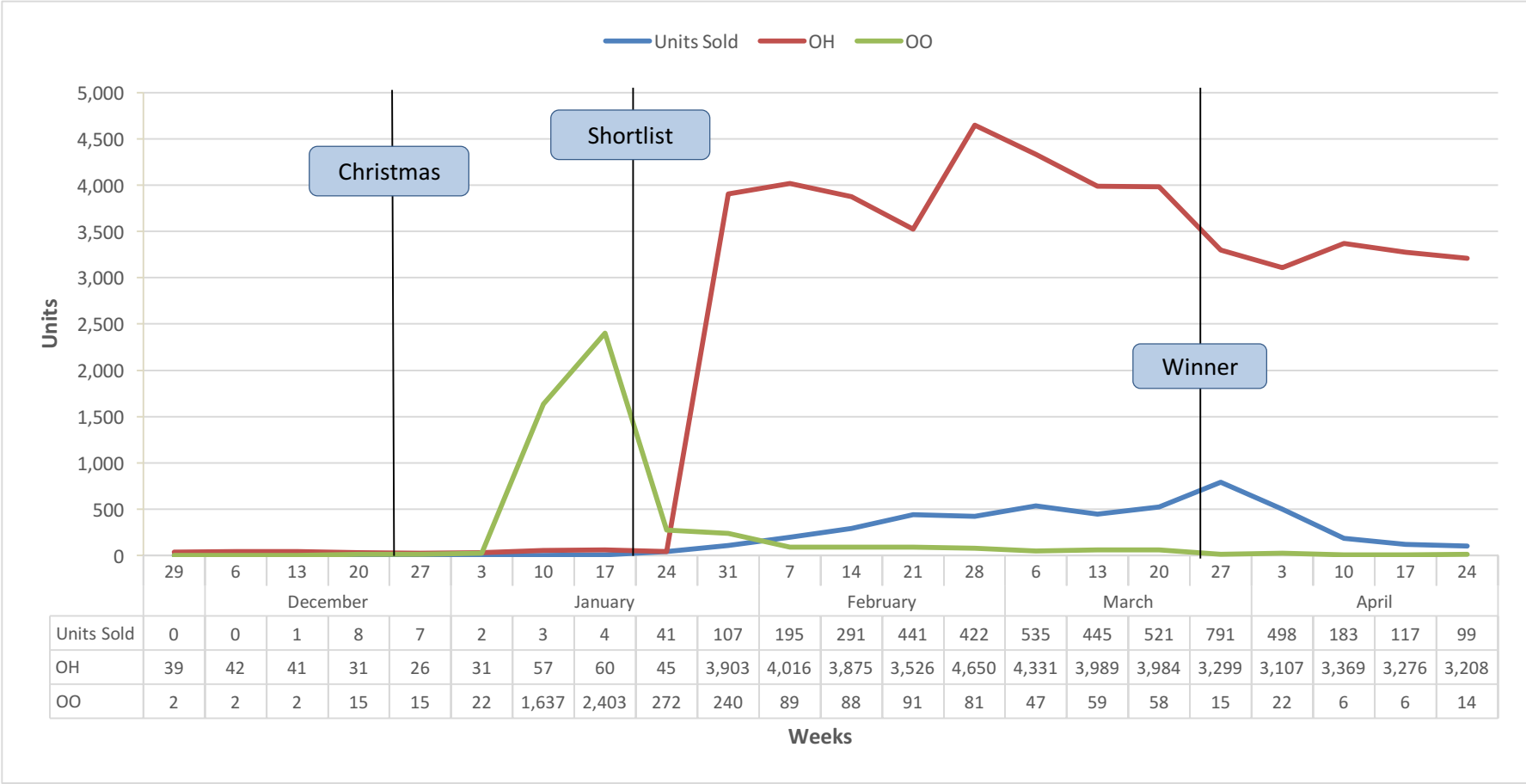
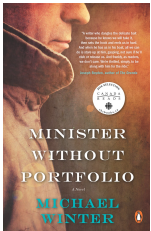
Defended by Adam “Edge” Copeland

Sales vs. On Hand vs. On Order

- Combined HT and TP ISBNs

PENGUIN CANADA
TRADE PAPERBACK
9780143187806
\$21.00

HARDCOVER TRADE
9780670067152
\$30.00



Nominee

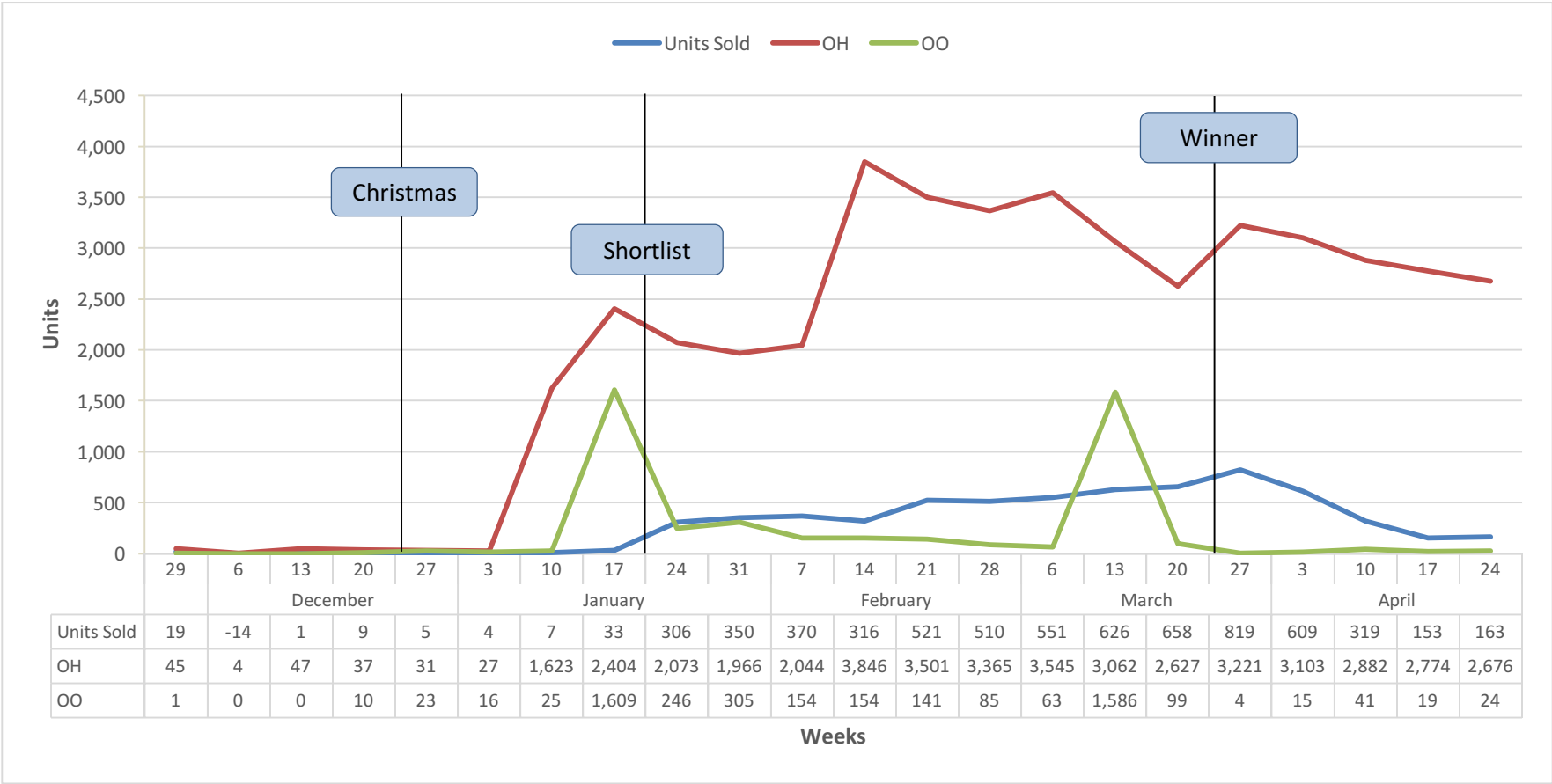
SALEEMA NAWAZ'S *BONE AND BREAD*

Defended by Farah Mohamed

HOUSE OF ANANSI PRESS
TRADE PAPERBACK
9781770890091
\$22.95



Sales vs. On Hand vs. On Order



Nominee

TRACEY LINDBERG'S *BIRDIE*

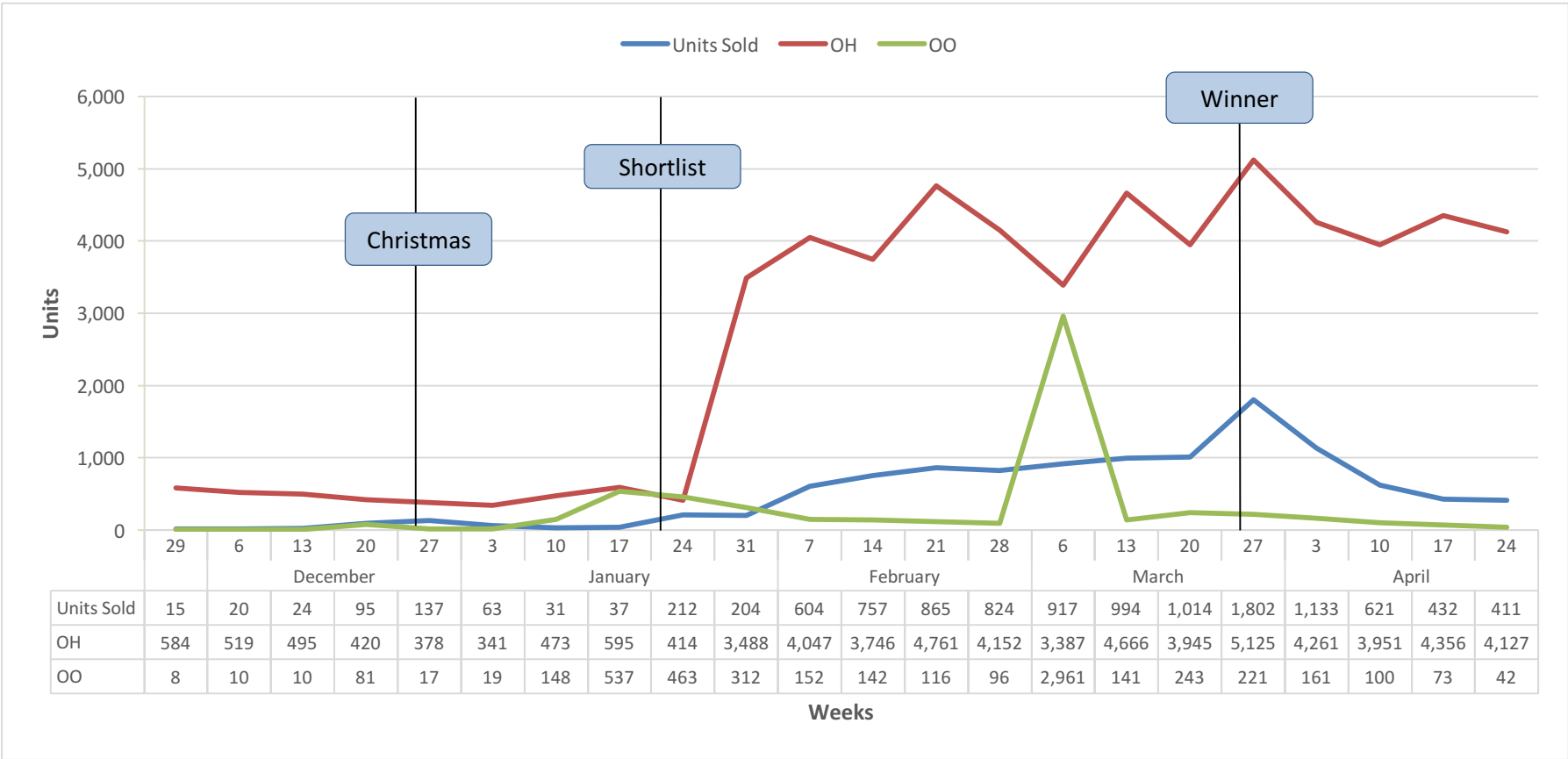
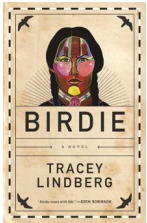
Defended by Bruce Poon Tip

Sales vs. On Hand vs. On Order

- Combined HT and TP ISBNs

HARPERCOLLINS PUBLISHERS
TRADE PAPERBACK
9781443451352
\$22.99

HARDCOVER TRADE
9781554682942
\$29.99

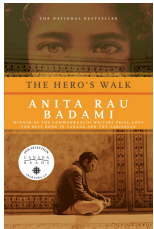


Nominee

ANITA RAU BADAMI'S *THE HERO'S WALK*

Defended by Vinay Virmani

KNOPF CANADA
TRADE PAPERBACK
9780676973600
\$21.00



Sales vs. On Hand vs. On Order



WINNER

LAWRENCE HILL'S *THE ILLEGAL*

Defended by Clara Hughes

Sales vs. On Hand vs. On Order

- Combined TP and HT ISBNs

HARPERCOLLINS PUBLISHERS

HARDCOVER TRADE

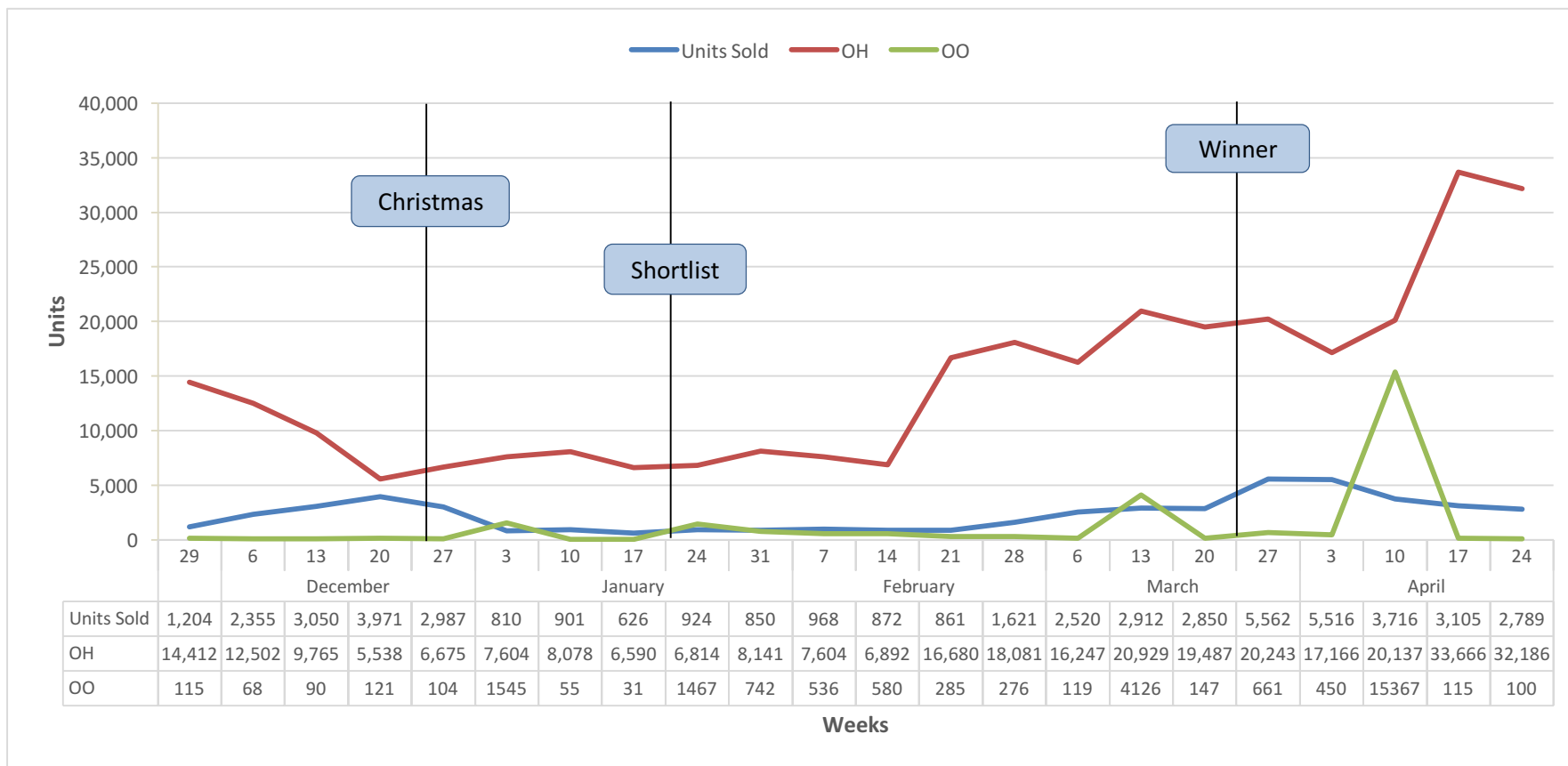
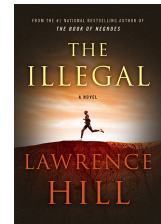
9781554683833

\$34.99

TRADE PAPERBACK

9781554683840

\$24.99



WINNER COMPARISON 2011–2016

2016

Lawrence Hill's *The Illegal*

HARPERCOLLINS PUBLISHERS

HARDCOVER TRADE | 9781554683833 | \$34.99

TRADE PAPERBACK | 9781554683840 | \$24.99

2013*

Lisa Moore's *February*

HOUSE OF ANANSI PRESS

TRADE PAPERBACK | 9780887849626 | \$19.95

2015 *

Kim Thuy's *Ru*

RANDOM HOUSE OF CANADA

TRADE PAPERBACK | 9780307359711 | \$18.95

TRADE PAPERBACK | 9780345816146 | \$17.95

2012*

Carmen Aguirre's *Something Fierce*

DOUGLAS & MCINTYRE

HARDCOVER TRADE | 9781553654629 | \$32.95

TRADE PAPERBACK | 9781771000369 | \$21.00

2014*

Joseph Boyden's *The Orenda*

PENGUIN GROUP (CANADA)

HARDCOVER TRADE | 9780670064182 | \$32.00

TRADE PAPERBACK | 9780143174165 | \$22.00

2011*

Terry Fallis's *The Best Laid Plans*

McCLELLAND & STEWART

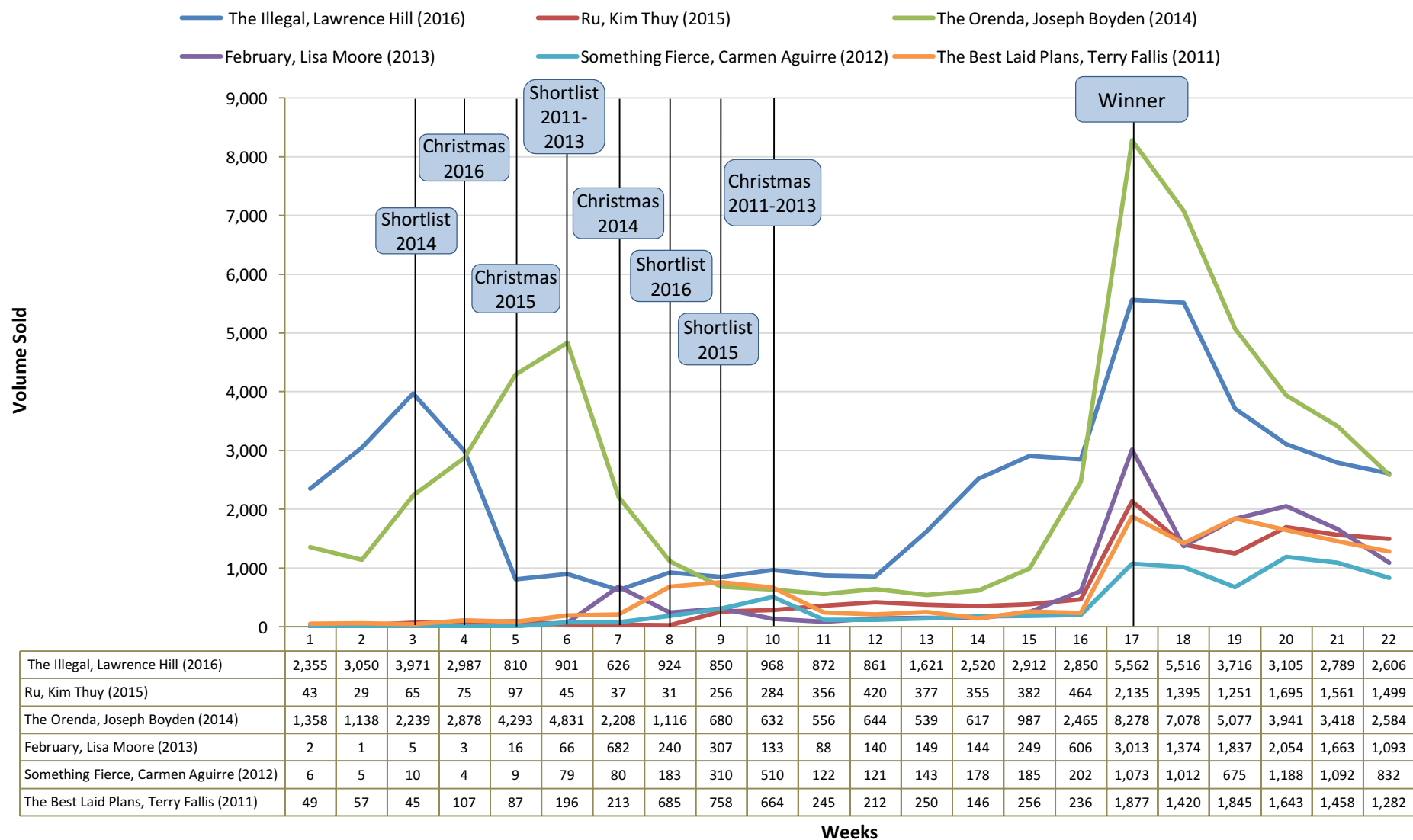
TRADE PAPERBACK | 9780771047589 | \$19.99

* Years where the program allowed the public to submit nominees and vote in polls prior to the debate.

The Canada Reads timeline has changed slightly over the past few years. In previous years, the shortlist was announced prior to Christmas, and typically sales would increase when the shortlist was announced and increase again at Christmas. In 2016, the longlist was announced prior to Christmas and the final five were announced mid-January. While this timing eliminates potential sales during the holiday season, the uptake following the shortlist announcement in January speaks to the award's influence during a time when the overall market is in a post-Christmas decline, remaining flat for a few months thereafter.

Despite these changes, sales trends remain consistent year-over-year. Sales tend to level out in weeks prior to the debate, followed by another increase in sales during debate week. Winning titles experience a spike during the debate week and continue to experience above-average sales for many weeks following the winner announcement.

WINNER COMPARISON: VOLUME SOLD



CONCLUSION

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

- The shortlist announcement has a notable and consistent effect on the market share of the nominated titles. In previous years, sales increased 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. This year, sales increased following the shortlist announcement through to debate week.
 - Debate week has an 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 the debate.
 - Sales of nominated titles spike during the debate week and then drop off rather quickly, whereas sales of the winning title increase following the debate week and remain strong 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.
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