



BNC RESEARCH

A RESEARCH REPORT BY BOOKNET CANADA

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10.2017

The Scotiabank Giller Prize Congratulations, nominees!

What happens now?
What if you win?



**BOOKNET
CANADA**

PREPARED BY BNC STAFF
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Introduction

Congratulations, one of your books has been nominated for a literary award! Along with national recognition comes increased orders and sales numbers. How can you predict when your books will start flying off the shelves? When should you reprint? What if your book wins?

BNC Research's literary award studies help Canadian publishers stay on top of the game and avoid any surprises. 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.

Based on our research, the Scotiabank Giller Prize is the Canadian literary award with the biggest impact on book sales. To get a sense of what to expect during the award season, and to help nominees 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 all the winners between 2011 and 2016.

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 Giller season?
- On-order position by week – When do orders rise and fall, and by how much?

The first section of this study compares the 2016 Scotiabank Giller Prize shortlisted titles 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 behavior, and how it relates to the rise and fall of the fiction market as a whole.

Next, we look at the 2016 shortlisted titles individually, showing volume sold, units on hand (OH), and units on order (OO) throughout the Scotiabank Giller Prize 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 Giller winners from 2011 to 2016, showing the impact of the award over time and noting similarities and special cases. The volume-sold comparison shows how the award 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.

Caveats

Based on publisher feedback, we estimate that BNC SalesData represents 85% of physical book industry sales in Canada. 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 most major independent bookstores, and many smaller ones but not all, any of which could be actively promoting an award winner. It also does not capture some specialty independent bookstores 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.

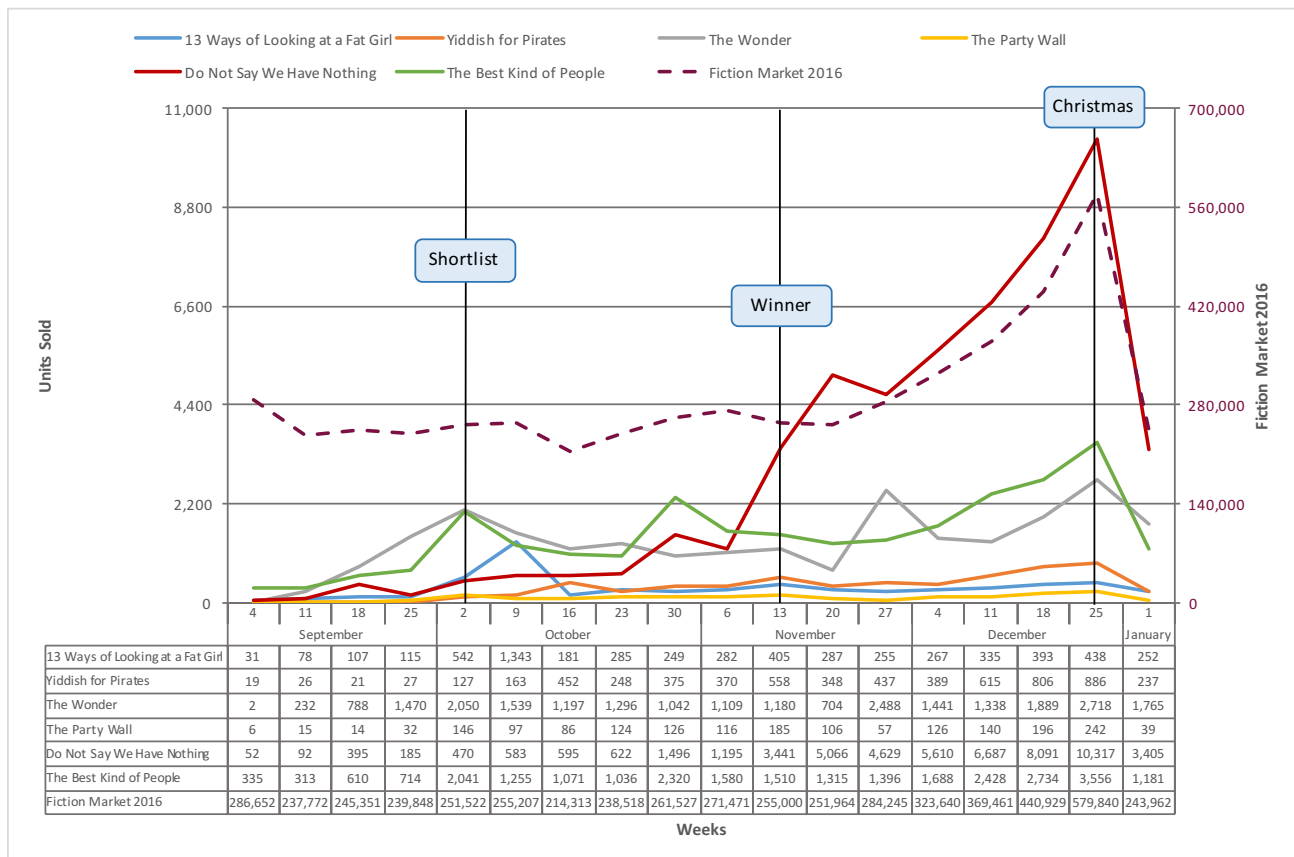
The Scotiabank Giller Prize 2016

Organized by Scotiabank

Nominations announced: Sept. 26, 2016

Winners announced: Nov. 7, 2016

Volume Sold for All Shortlist Titles and Winner



To demonstrate the impact that the Scotiabank Giller Prize has on Canadian sales, the following figures represent the average percent change in unit sales that occurs after the shortlist and winner announcements.

Shortlist announcement (Sept. 26, 2016):

Shortlist titles experienced an average percent change in units sold of 426% after the shortlist announcement. Undeniably, just being nominated has an immediate impact on sales.

Winner announcement (Nov. 7, 2016):

Nominees experienced an average percent change of -12%, whereas the winning title experienced a sales increase of 359% after the winner announcement. After winning, *Do Not Say We Have Nothing* continued to see solid sales during the holiday season and peaked the week before Christmas, suggesting that the Giller Prize positively influences consumer behaviour for the winning title during the holiday season.

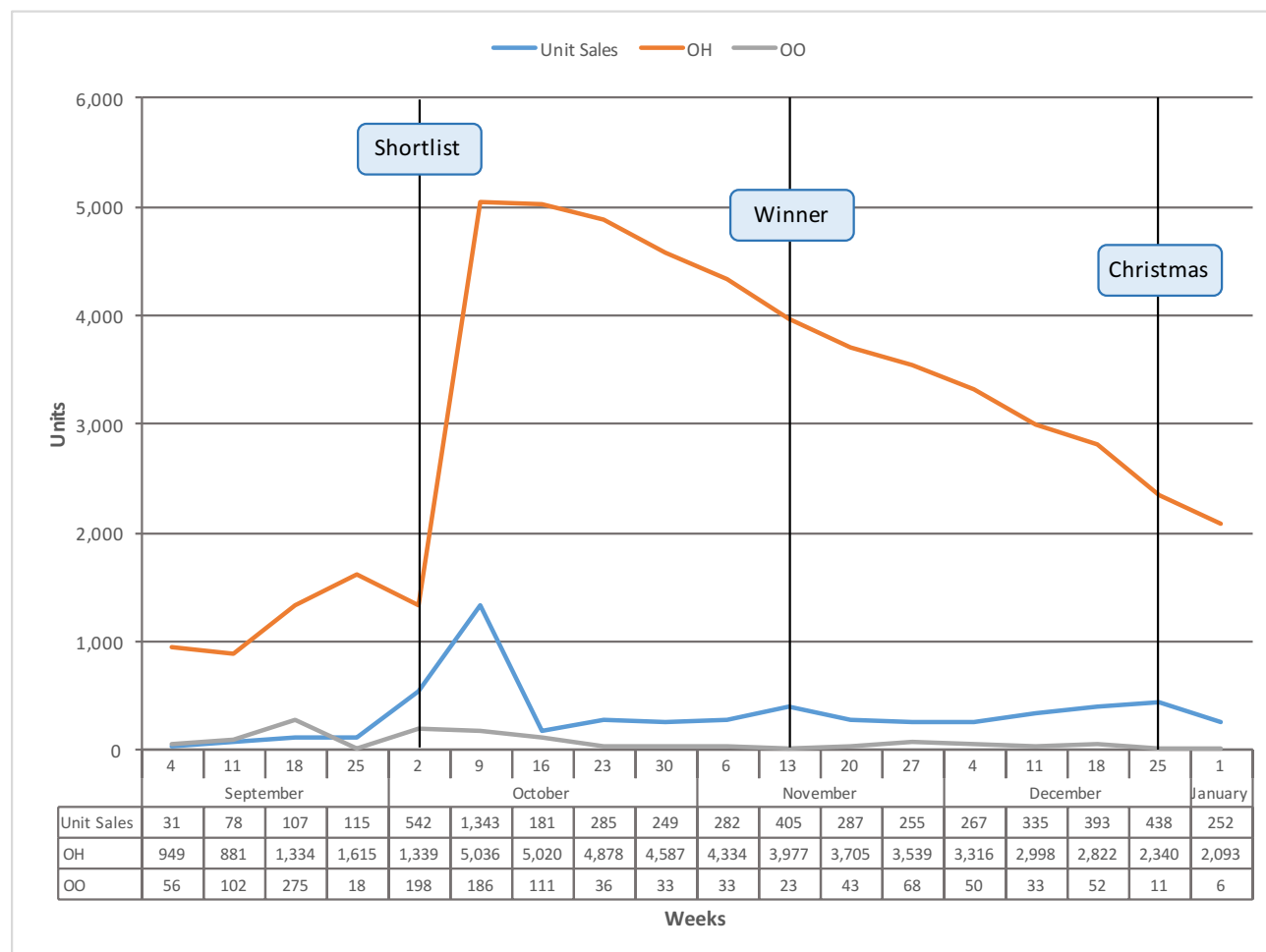
Nominee

Mona Awad's *13 Ways of Looking at a Fat Girl*

Penguin Canada
Trade Paperback
9780143194798
\$20.00



Sales vs. On Hand vs. On Order



Nominee

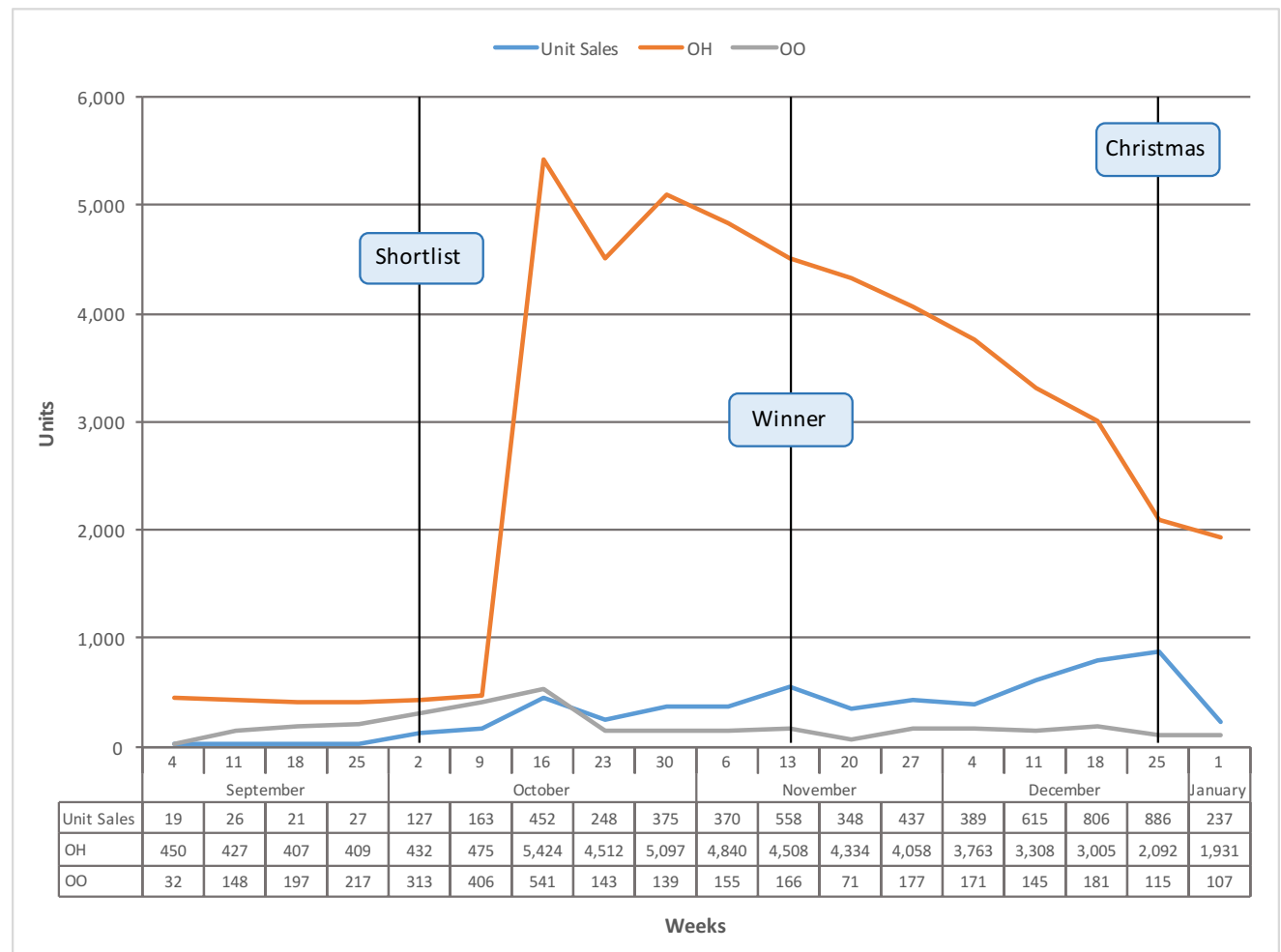
Gary Barwin's *Yiddish for Pirates*

Random House Canada
 Hardcover Trade
 9780345815514
 \$32.00
 Trade Paperback
 9780345815521
 \$21.00



Sales vs. On Hand vs. On Order

- Combined HT and TP ISBNs



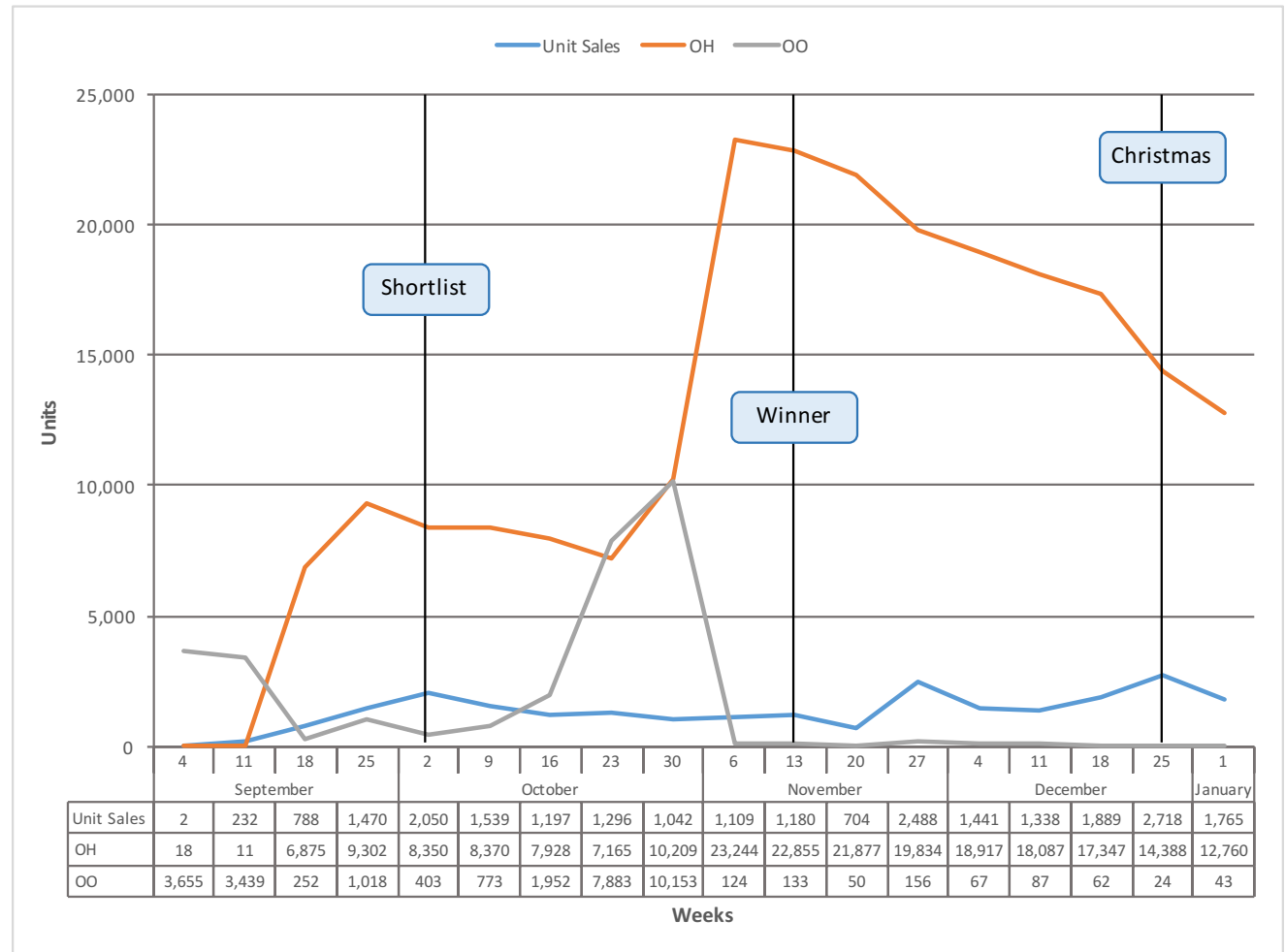
Nominee

Emma Donoghue's *The Wonder*

HarperCollins Publishers
Hardcover Trade
9781443450027
\$32.99



Sales vs. On Hand vs. On Order



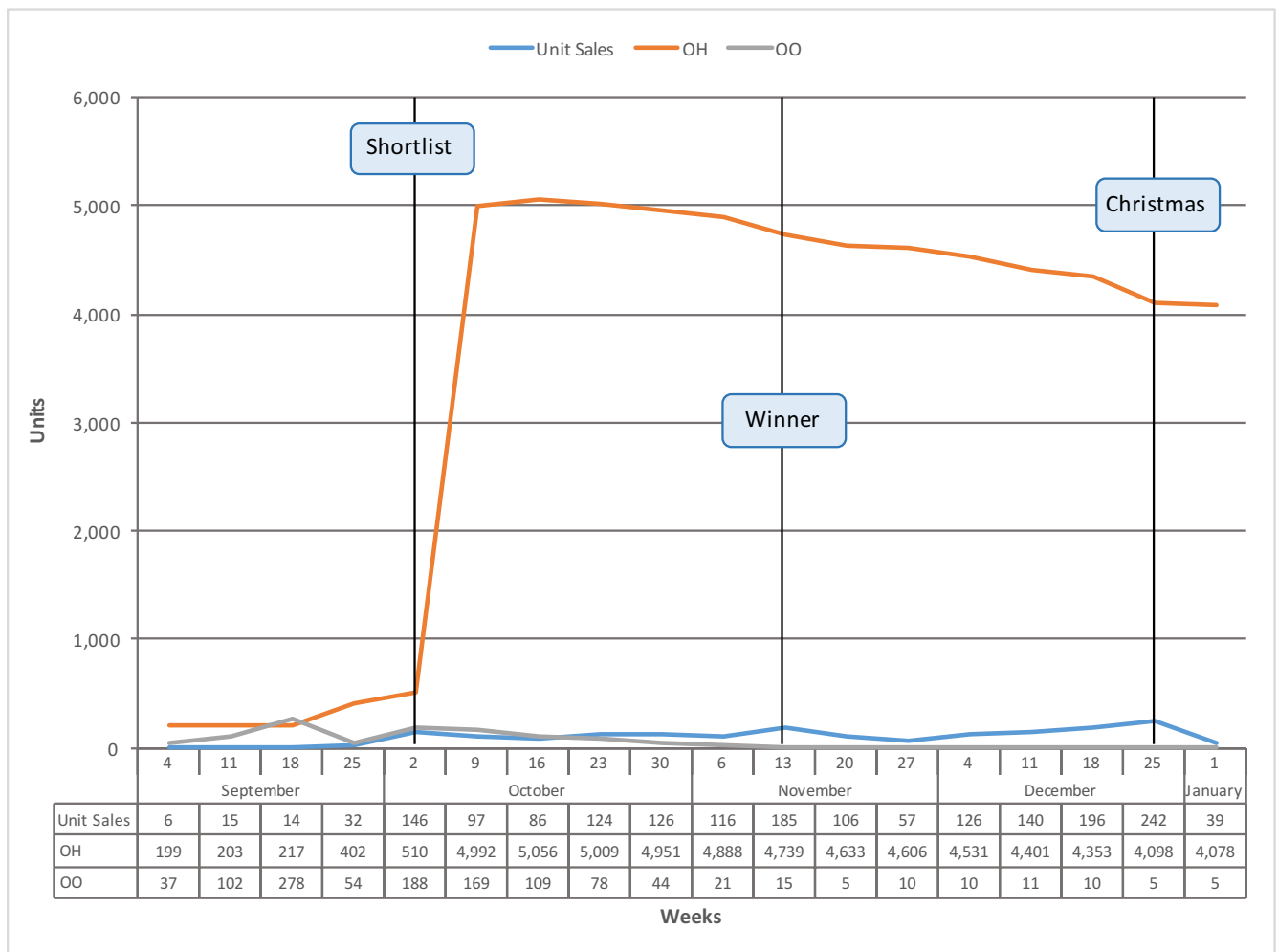
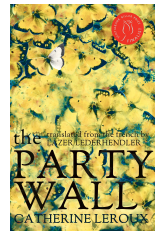
Nominee

Catherine Leroux's *The Party Wall*

Translated by Lazer Lederhendler

Sales vs. On Hand vs. On Order

Biblioasis
Trade Paperback
9781771960762
\$19.95



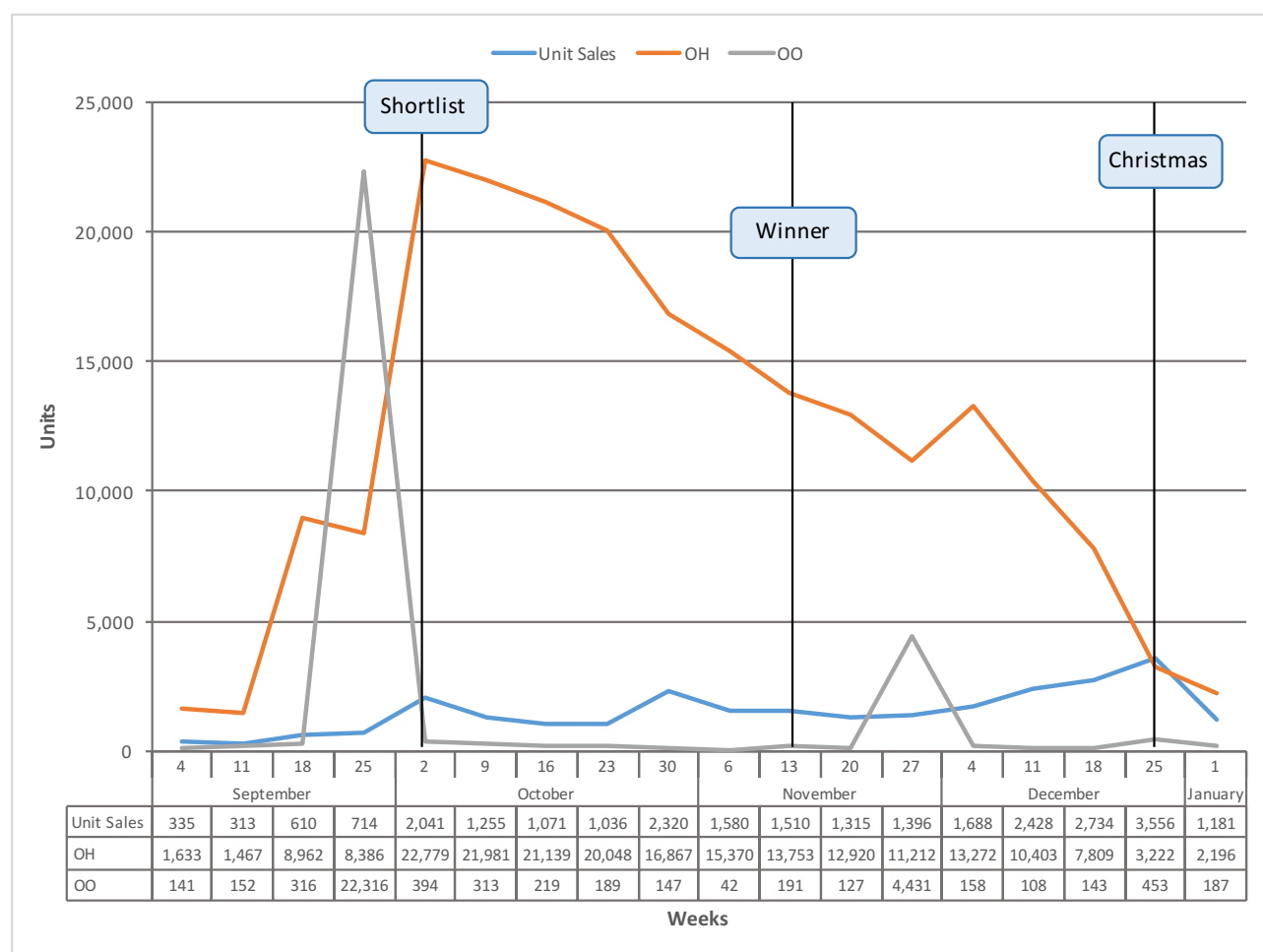
Nominee

Zoe Whittall's *The Best Kind of People*

House of Anansi
Trade Paperback
9781770899421
\$22.95



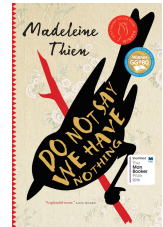
Sales vs. On Hand vs. On Order



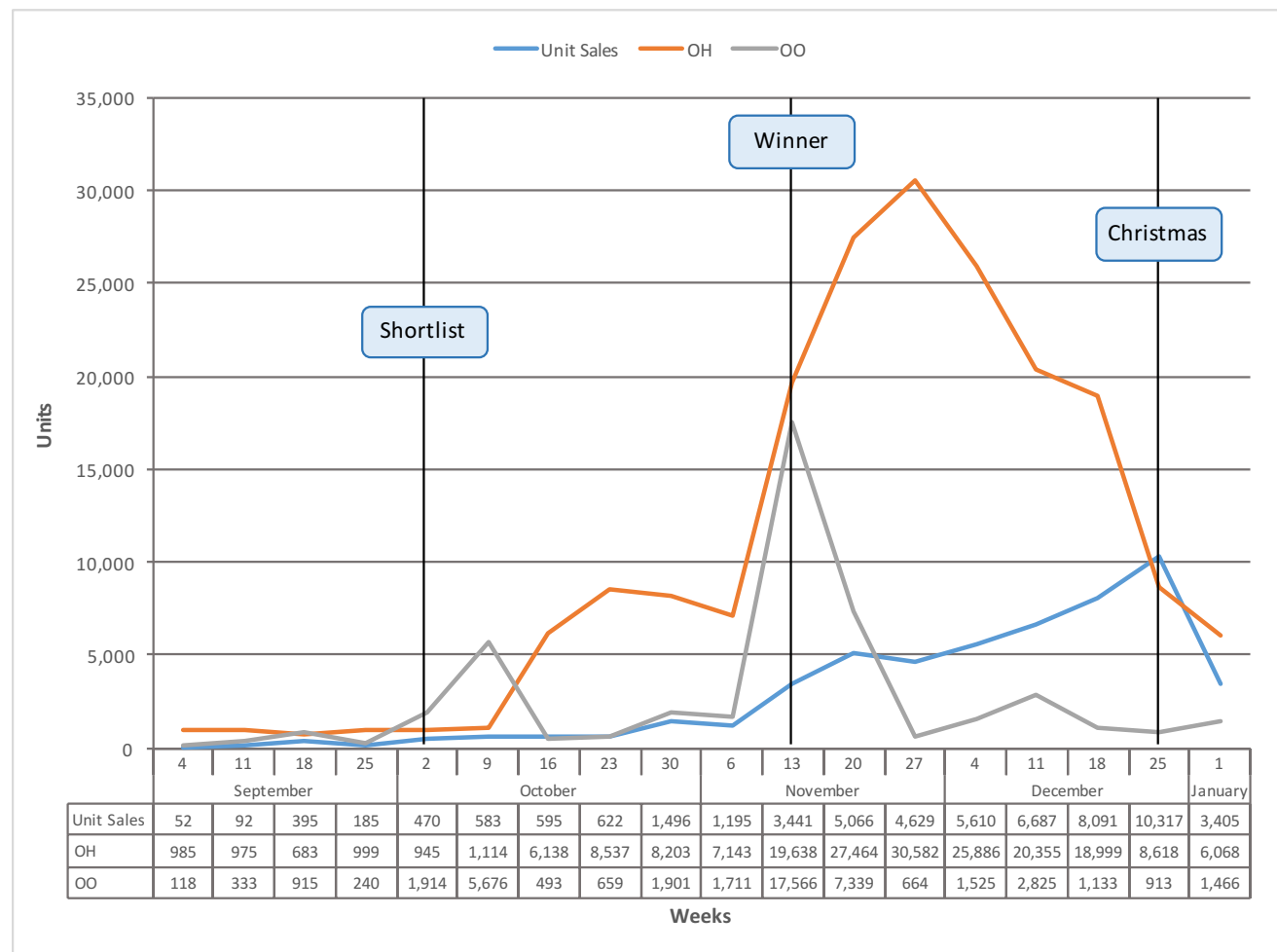
Winner

Madeleine Thien's *Do Not Say We Have Nothing*

Knopf Canada
Hardcover Trade
9780345810427
\$35.00



Sales vs. On Hand vs. On Order



In addition to being shortlisted for the Giller, Madeleine Thien's *Do Not Say We Have Nothing* won the 2016 Governor General's Literary Award for Fiction on Oct. 25, 2016.

Winner Comparison 2011-2016

2016

Madeleine Thien's *Do Not Say We Have Nothing*
Knopf Canada
Hardcover Trade | 9780345810427 | \$35.00

2015

André Alexis's *Fifteen Dogs*
Coach House Books
Trade Paperback | 9781552453056 | \$19.95

2014

Sean Michaels's *Us Conductors*
Random House of Canada
Hardcover Trade | 9780345815767 | \$26.00
Trade Paperback | 9780345813329 | \$24.95

2013

Lynn Coady's *Hellgoing: Stories*
House of Anansi
Trade Paperback | 9781770893085 | \$19.95

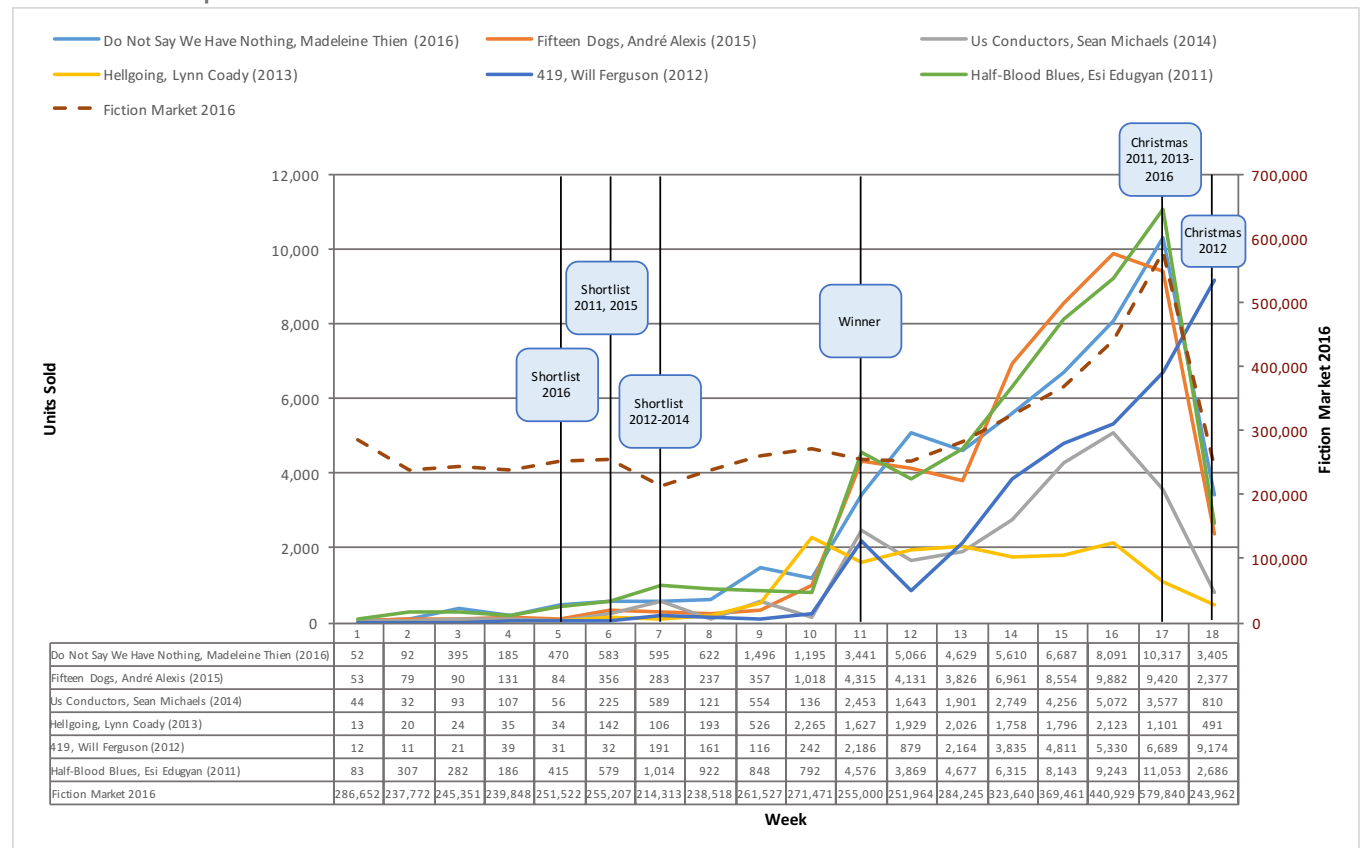
2012

Will Ferguson's *419*
Viking Canada
Trade | 9780670064717 | \$32.00

2011

Esi Edugyan's *Half-Blood Blues*
Thomas Allen
Trade Paperback | 9780887627415 | \$24.95

Winner Comparison – Volume Sold



Winning titles from the last six years tend to follow similar sales patterns. *Do Not Say We Have Nothing*, like previous winners, experienced increased sales during the holiday season, followed by a post-holiday decline.

Of all the winners, Esi Edugyan's *Half-Blood Blues* sold the most copies during the 18-week period.

Conclusion

The Scotiabank Giller Prize continues to have a positive impact on Canadian book sales. Our analysis leads us to conclude the following:

- Nominated titles tend to see a sales increase immediately following the shortlist announcement.
- While sales can decrease for nominees following the winner announcement, the winning title consistently experiences increased sales and goes on to outsell all the other shortlisted titles. Winning titles have increased sales during the holiday season, and then declining sales immediately after Christmas.
- Orders for the winning title increase in the weeks leading up to the winner announcement, and peak the week of the announcement.
- Having titles nominated for multiple awards may have a more positive impact on sales. On top of winning the 2016 Giller Prize and the 2016 Governor General's Literary Prize for Fiction, Madeleine Thien's *Do Not Say We Have Nothing* was also nominated for the 2016 Man Booker Prize on Sept. 13, 2016.
- Format may have less influence on sales volume than previously suspected — while sales for André Alexis's *Fifteen Dogs* and Esi Edugyan's *Half-Blood Blues* suggest that the lower price point of trade paperbacks may result in more sales, Lynn Coady's *Hellgoing* is not synonymous with this trend. Miriam Toew's *All My Puny Sorrows*, shortlisted for the 2014 Giller, also experienced strong sales despite being available only in hardcover trade. Furthermore, Madeleine Thien's *Do Not Say We Have Nothing*, which has the highest retail price of all the winning titles in the past six years, experienced the second-highest sales volume during the 18-week period of all the winners, coming in behind Esi Edugyan's *Half-Blood Blues* only.