



BNC RESEARCH

A RESEARCH REPORT BY BOOKNET CANADA

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01.2019

Canada Reads Congratulations, nominees!

What happens now?
What if you win?



**BOOKNET
CANADA**

PREPARED BY BNC STAFF

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Introduction

It's debating time! To the Canada Reads nominees and their publishers: congratulations to you and cheers to the Canadians who love to read. Along with a national broadcast comes added endorsement and publicity for your nominated titles, raising questions around planning. How will your nomination affect orders? Will you need to reprint? What should you do if your title wins?

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 all the winners between 2013 and 2018.

Our research shows that interesting sales patterns follow the debates and the extensive media coverage that goes along with them.

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

The first section of this study compares the 2018 Canada Reads nominees by volume sold and includes a look at the overall 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 market as a whole.

Next, we look at the 2018 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 2013 to 2018, 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.

Caveats

Based on publisher feedback, we estimate that BNC SalesData represents 85% of physical 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 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.

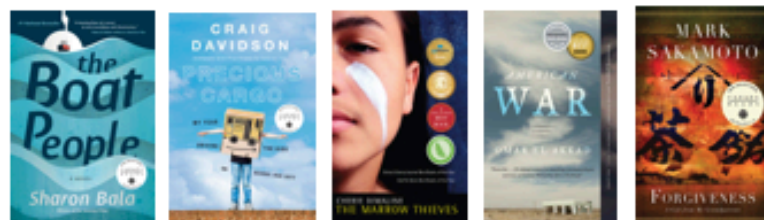
At this time, ebook sales are not represented in BNC's data. Therefore, all numbers in this report refer to print books only.

CBC Canada Reads 2018

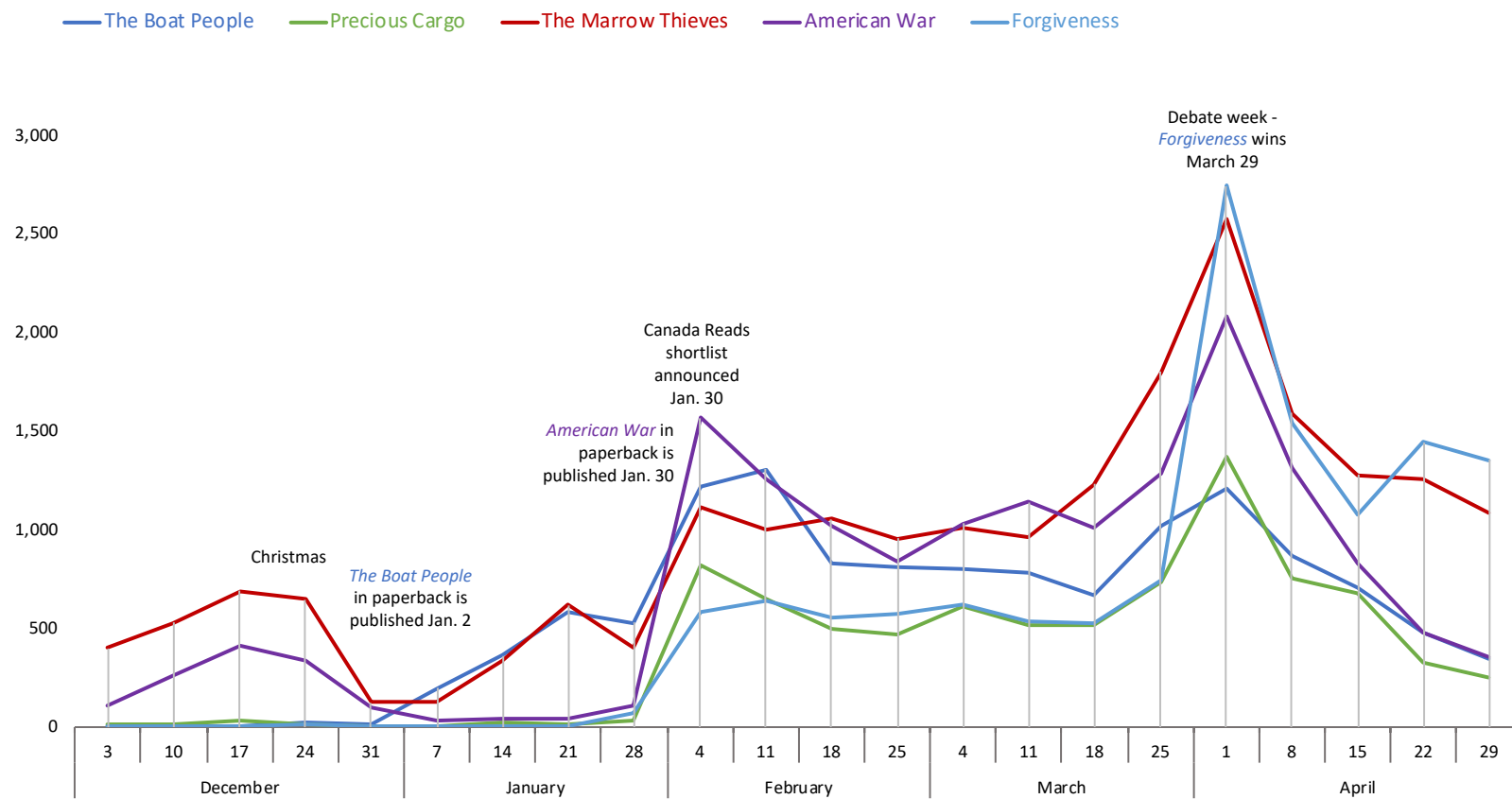
Volume Sold

Organized by the CBC
Nominations announced: Jan. 30, 2018
Debate week: March 26-29, 2018
Winner: *Forgiveness*

Christmas Shortlist announced Winner announced



							2017-2018 Markets			
		<i>The Boat People</i>	<i>Precious Cargo</i>	<i>The Marrow Thieves</i>	<i>American War</i>	<i>Forgiveness</i>	Overall Unit Sales	Fiction	Non-Fiction	Week number
December	3	0	9	395	102	1	507	344,788	566,376	1
	10	0	9	527	260	5	801	386,815	658,231	2
	17	0	32	687	409	0	1,128	444,569	802,796	3
	24	16	15	644	333	6	1,014	569,319	1,024,707	4
	31	11	3	120	94	0	228	279,125	424,790	5
January	7	192	4	122	32	2	352	216,414	344,710	6
	14	360	21	329	42	4	756	211,975	330,314	7
	21	579	9	616	41	3	1,248	215,052	338,848	8
	28	527	34	400	106	70	1,137	224,596	342,717	9
February	4	1,219	814	1,107	1,565	576	5,281	231,085	322,326	10
	11	1,305	644	1,001	1,252	637	4,839	223,654	300,234	11
	18	830	495	1,050	1,020	547	3,942	235,155	323,401	12
	25	812	464	950	834	567	3,627	222,613	293,107	13
March	4	796	610	1,004	1,030	622	4,062	248,019	301,304	14
	11	783	510	961	1,139	534	3,927	245,215	297,955	15
	18	661	518	1,229	1,007	521	3,936	231,986	302,706	16
	25	1,013	729	1,798	1,280	740	5,560	237,806	297,879	17
April	1	1,202	1,371	2,569	2,083	2,740	9,965	231,657	292,866	18
	8	864	746	1,588	1,311	1,538	6,047	242,087	282,450	19
	15	701	677	1,275	822	1,074	4,549	222,296	284,947	20
	22	475	327	1,252	476	1,440	3,970	227,527	302,100	21
	29	343	250	1,084	354	1,352	3,383	235,194	284,747	22



Shortlist announcement (Jan. 30, 2018):

- All five nominated titles experienced sales increases the week following the shortlist announcement, with an average increase in sales of approximately 1,495%. These sales continued to increase in anticipation of the debate week.

Winner announcement (March 29, 2018):

- **Nominees:** Sales peaked for all titles during the week of the debates. Immediately following the winner announcement, all titles saw a decrease in sales.
- Interestingly, unit sales do not reflect the order in which titles were eliminated. *The Marrow Thieves*, while being voted off second, saw debate week sales that were comparable with the winning title.
- **Winner:** Debate-week sales for *Forgiveness* were 270% higher than the previous week.

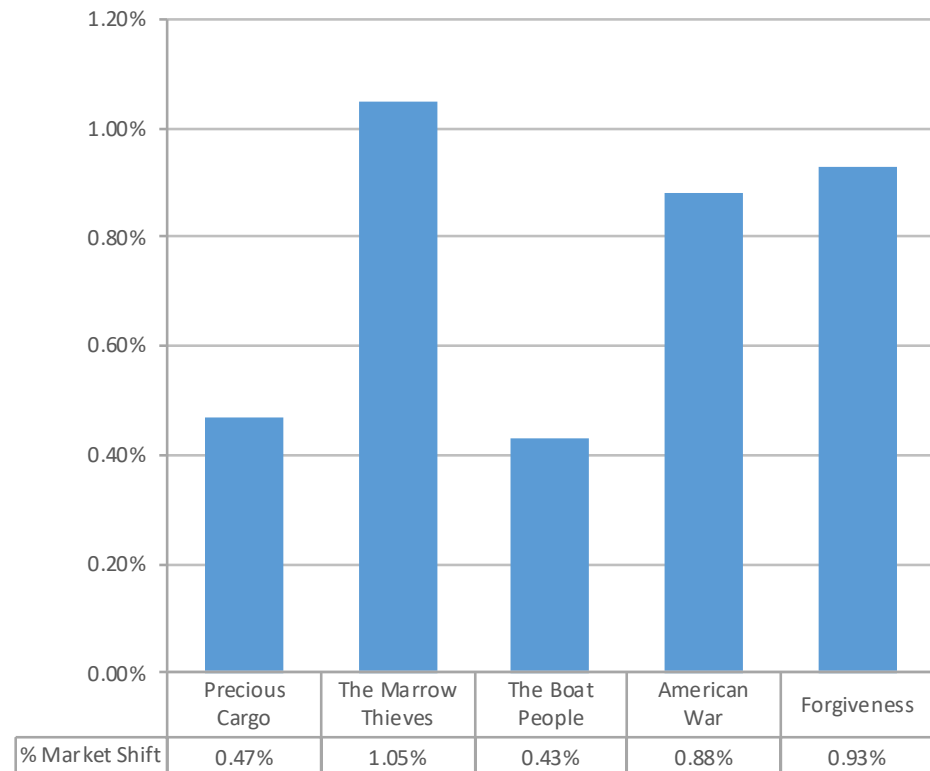
2018 Nominees

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 12 weeks earlier to calculate the shift each title saw during debate week. *Precious Cargo* was voted off on day one, *The Marrow Thieves* on day two, and *The Boat People* on day three. *American War* was eliminated on the final day, leaving *Forgiveness* the 2018 winner.

This year's competition showed little correlation between a title's rank in the competition and market share shift. While *The Marrow Thieves* experienced the largest increase in market share, *Forgiveness*, as the competition winner, experienced the second-highest increase.

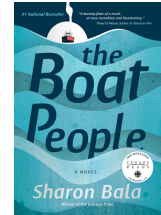


Nominee

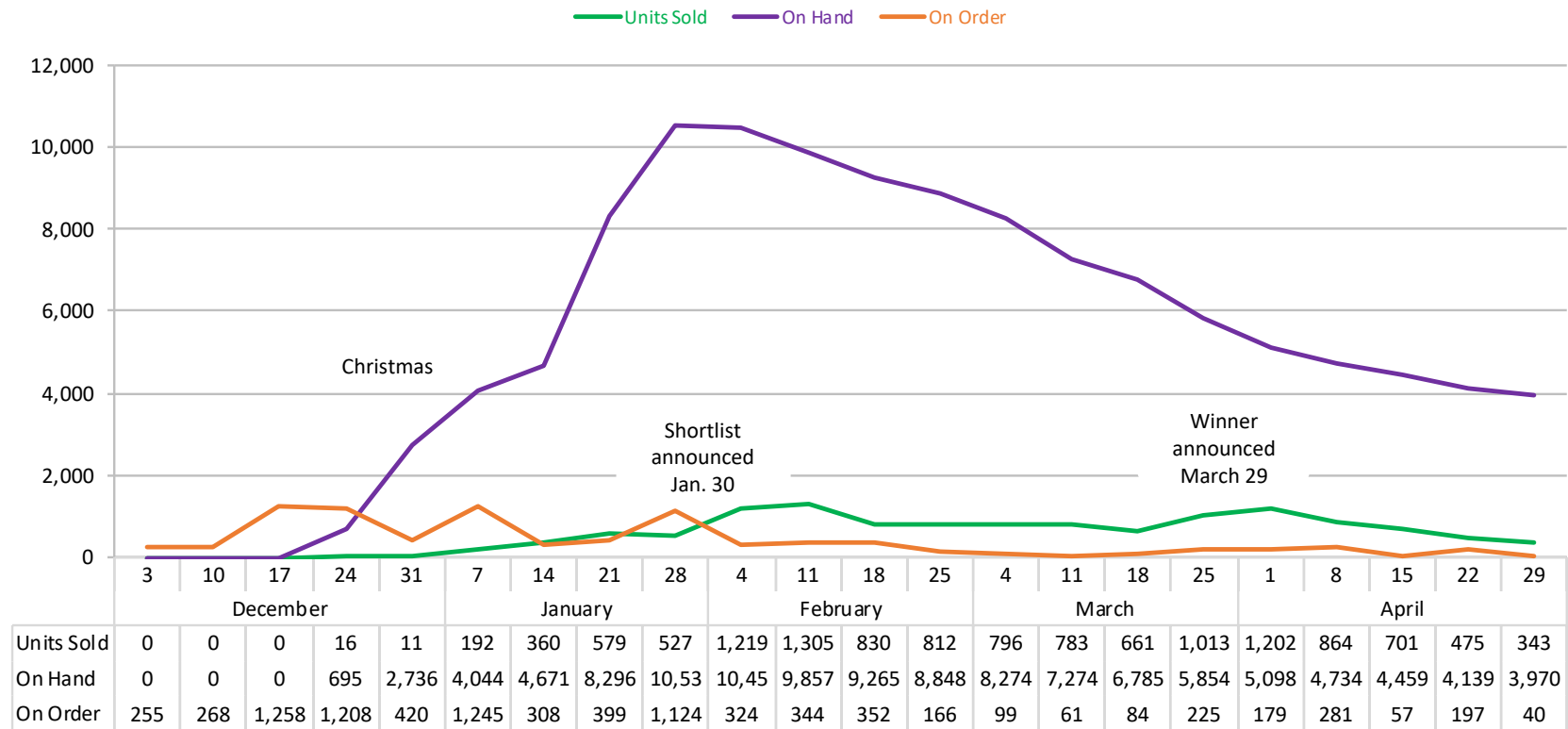
Sharon Bala's *The Boat People*

Defended by Mozhdah Jamalzadah

McClelland & Stewart
Trade Paperback
9780771024290
\$24.95



Sales vs. On Hand vs. On Order

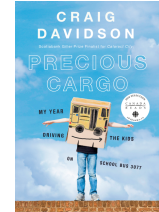


Nominee

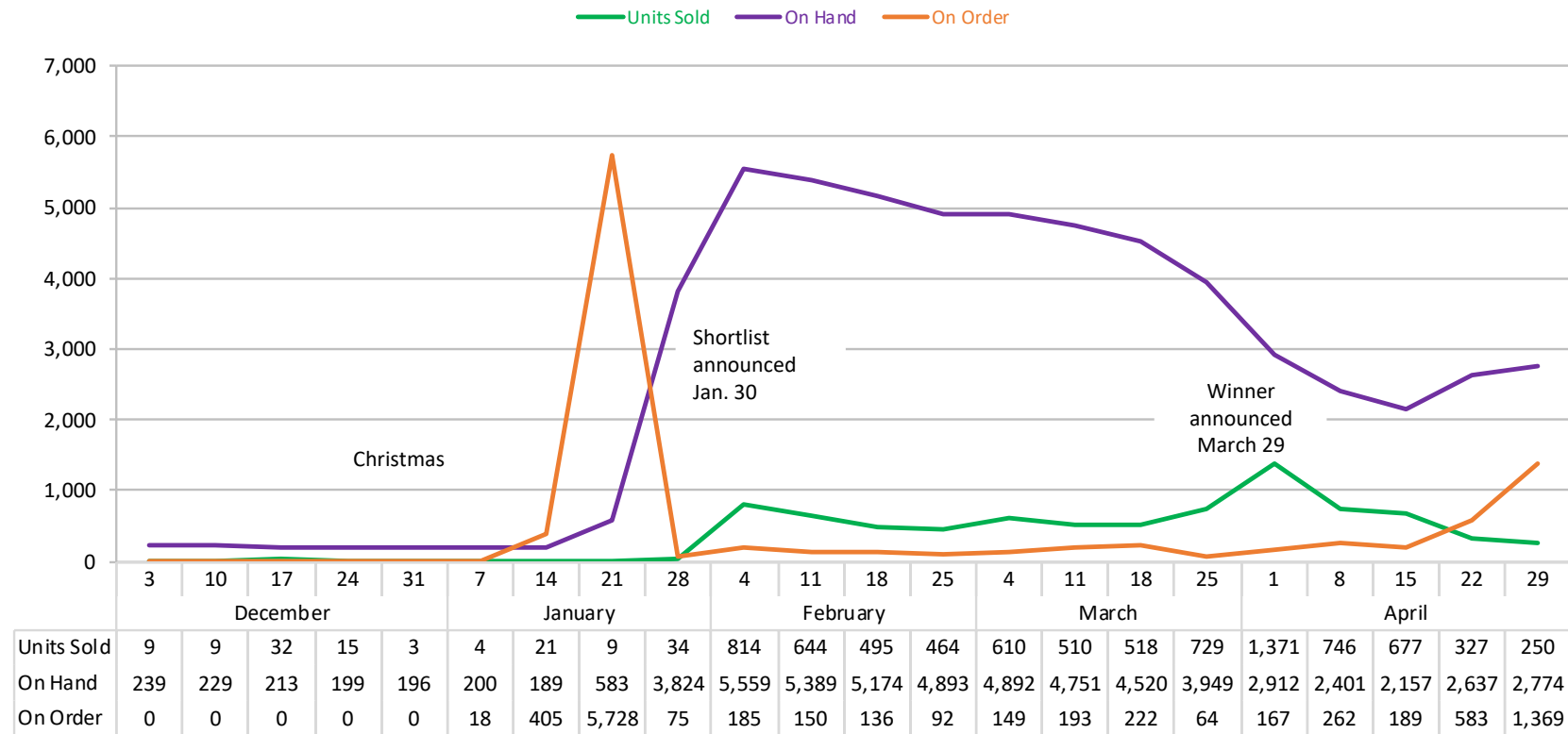
Craig Davidson's *Precious Cargo*

Defended by Greg Johnson

Knopf Canada
Trade Paperback
9780345810519
\$24.95



Sales vs. On Hand vs. On Order



Nominee

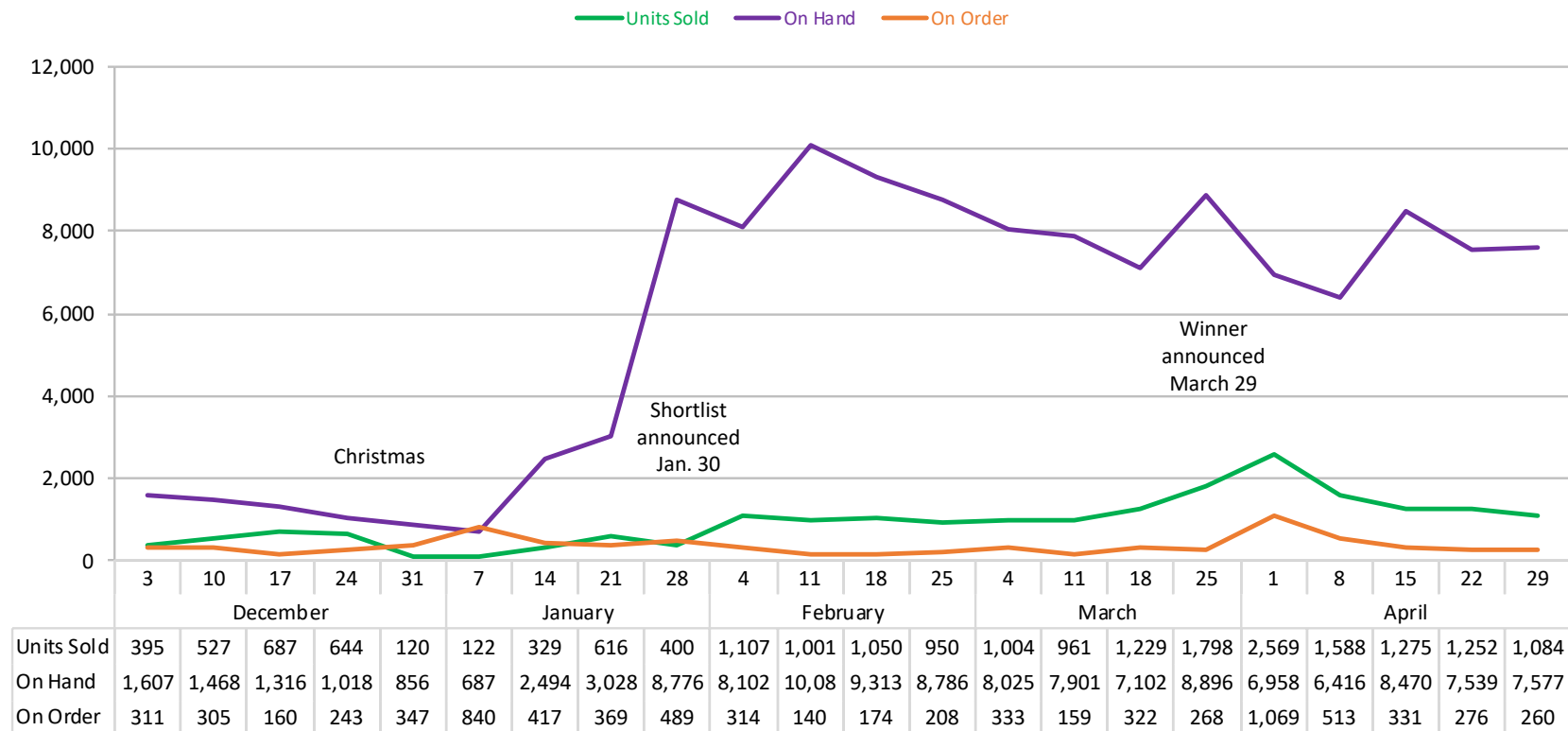
Cherie Dimaline's *The Marrow Thieves*

Defended by Jully Black

Cormorant Books
Trade Paperback
9781770864863
\$14.95



Sales vs. On Hand vs. On Order



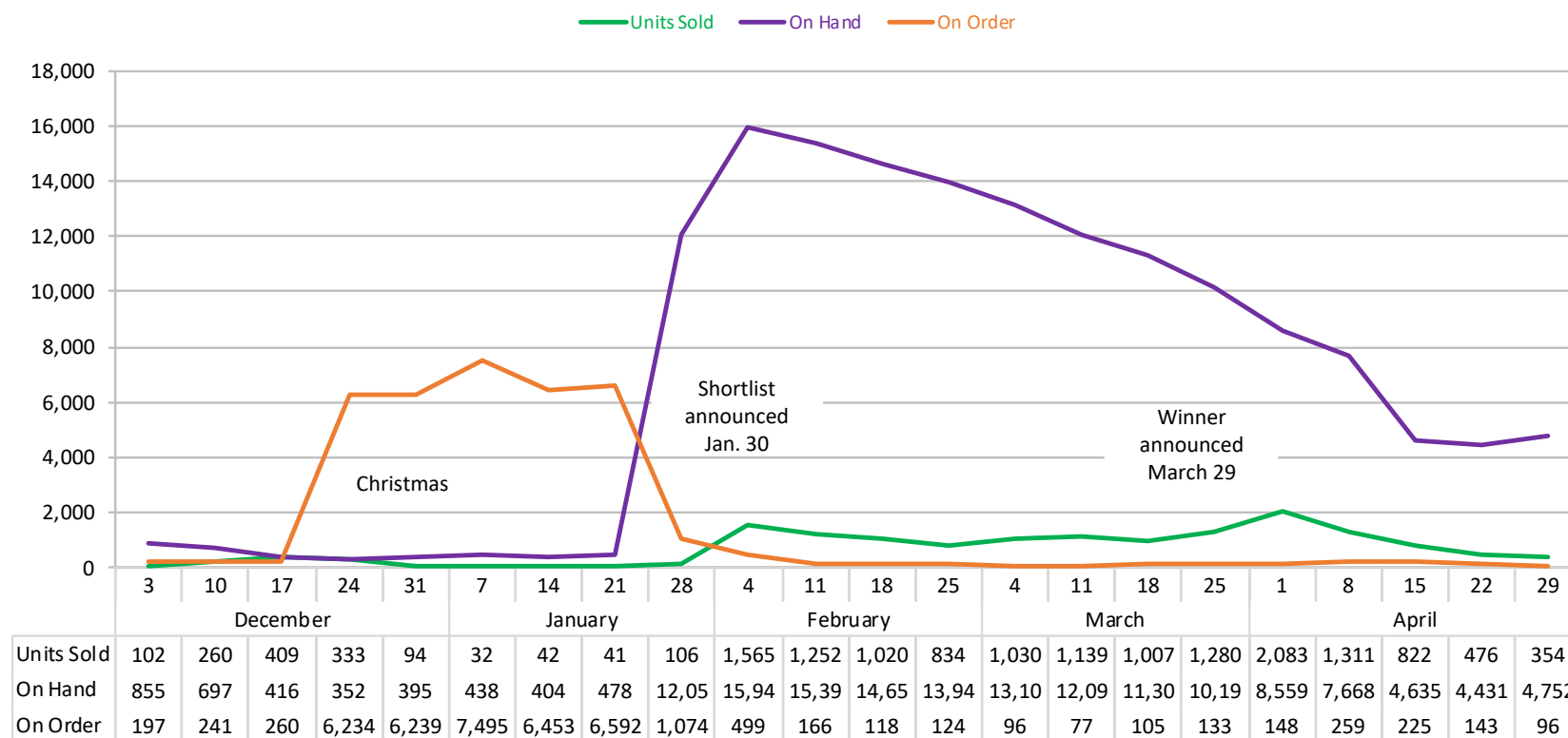
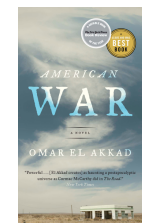
Nominee

Omar El Akkad's *American War*

Defended by Tahmoh Penikett

Sales vs. On Hand vs. On Order

McClelland & Stewart
Trade Paperback
9780771009419
\$21.00
Hardcover Trade
9780771009396
\$32.95



Sales for the paperback and hardcover editions are combined.

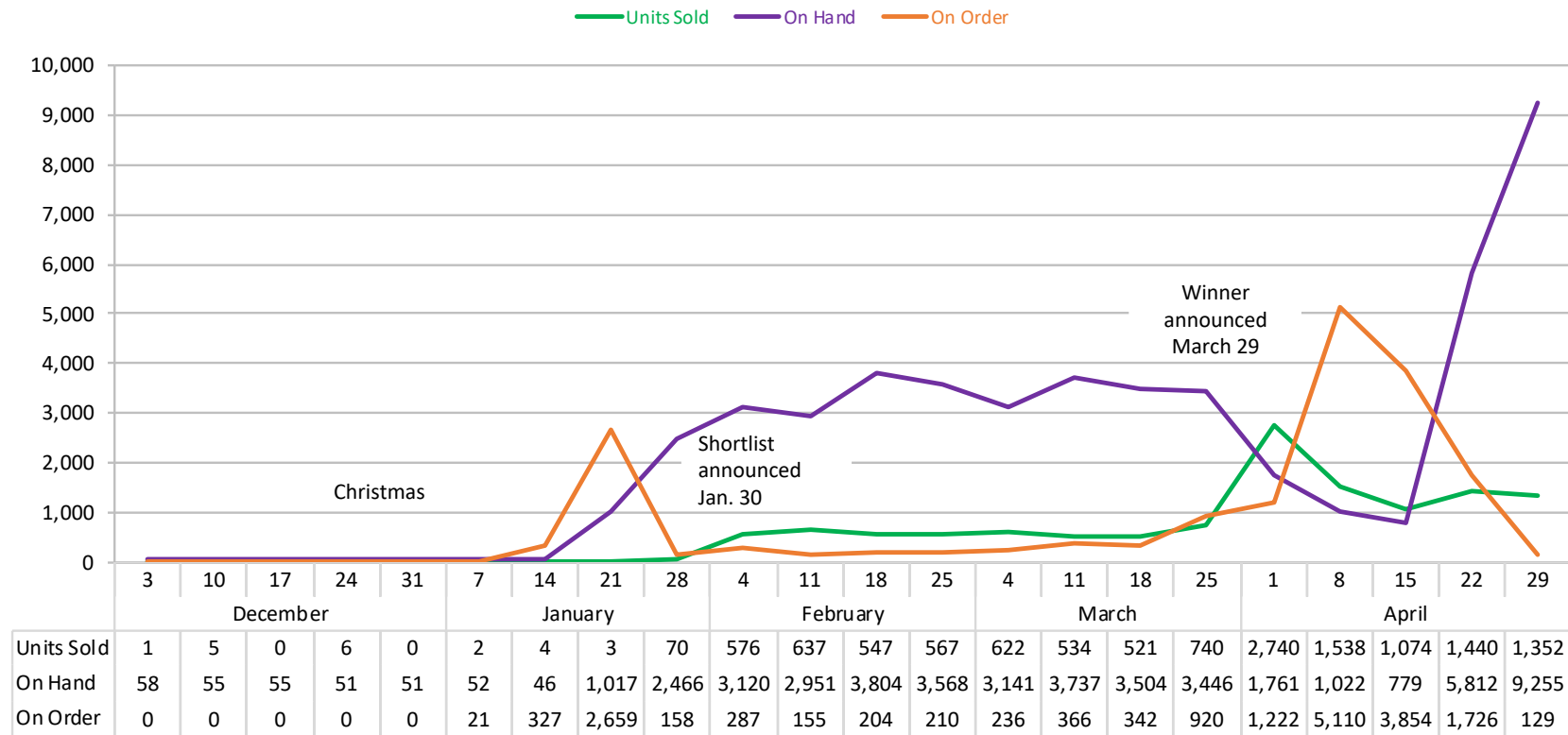
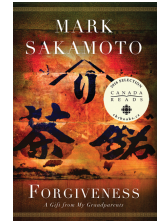
Winner

Mark Sakamoto's *Forgiveness*

Defended by Jeanne Beker

Sales vs. On Hand vs. On Order

HarperCollins Publishers
Trade Paperback
9781443417983
\$19.99
Hardcover Trade
9781443417976
\$29.99



Sales for the paperback and hardcover editions are combined.

Winner Comparison 2013-2018

2018

Mark Sakamoto's *Forgiveness*
HarperCollins Publishers
Trade Paperback | 9781443417983 | \$19.99
Hardcover Trade | 9781443417976 | \$29.99

2015*

Kim Thúy's *Ru*
Random House of Canada
Trade Paperback | 9780307359711 | \$18.95
Trade Paperback | 9780345816146 | \$17.95

2017

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

2014*

Joseph Boyden's *The Orenda*
Penguin Group Canada
Trade Paperback | 9780143174165 | \$22.00
Hardcover Trade | 9780670064182 | \$32.00

2016

Lawrence Hill's *The Illegal*
HarperCollins Publishers
Trade Paperback | 9781554683840 | \$24.99
Hardcover Trade | 9781554683833 | \$34.99

2013*

Lisa Moore's *February*
House of Anansi Press
Trade Paperback | 9780887849626 | \$19.95

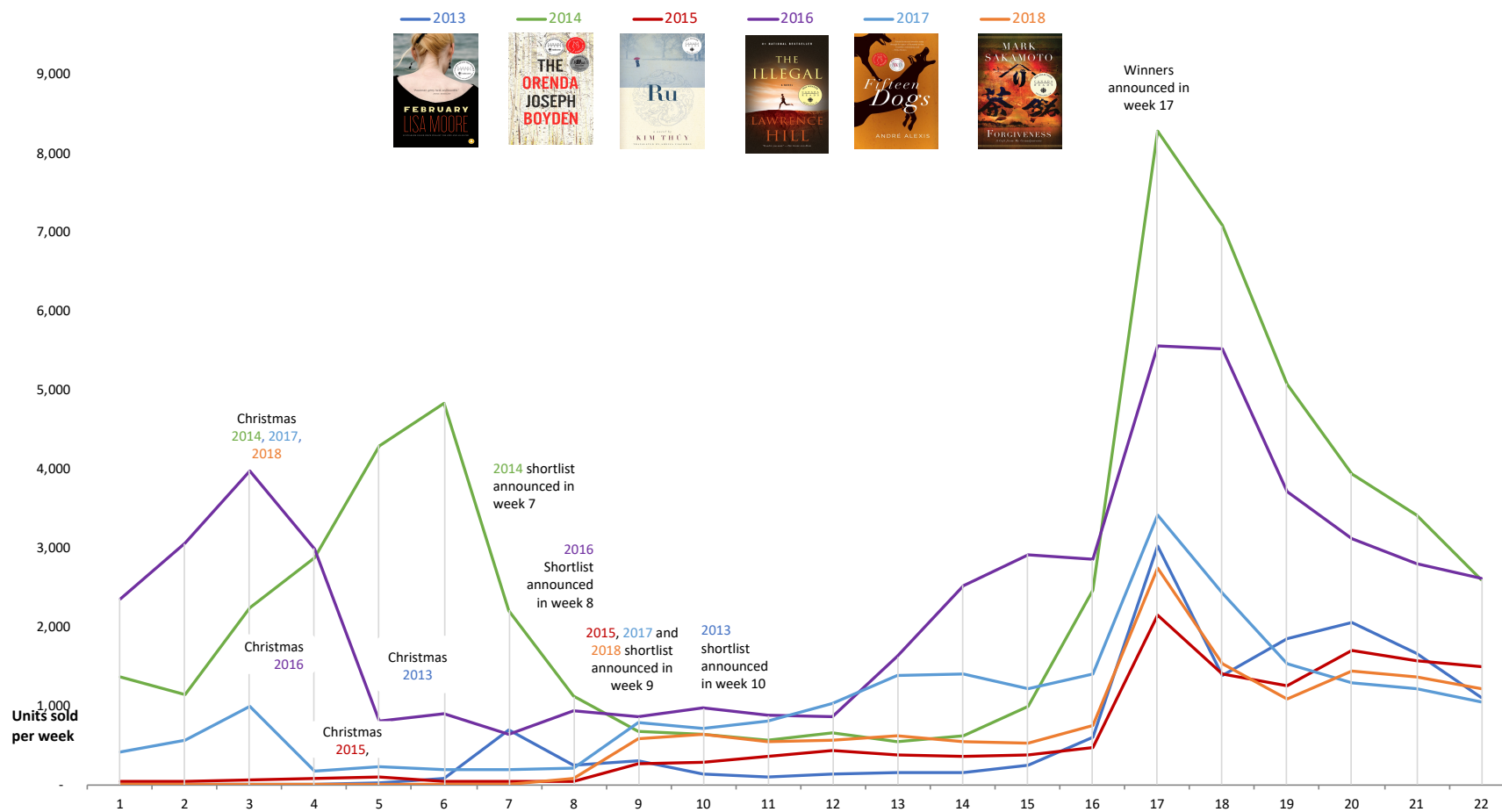
**Years where the program allowed the public to submit nominees and vote in polls prior to the debate.*

The Canada Reads timeline has altered over the past few years. Prior to 2016, the shortlist announcement occurred before the holiday season, with sales typically increasing after the shortlist announcement and again leading into the holiday season. For the past three years, the longlist has been announced prior to Christmas and the shortlist has been announced at the end of January. Although this eliminates potential sales during the holiday season, it makes evident that the climb in sales following the shortlist announcement speaks to the influence of Canada Reads, as the overall market is in a post-holiday decline.

Despite these changes, sales trends remain consistent. Sales are level for weeks leading up to the debate, followed by an increase in sales during debate week. Winning titles tend to experience a large spike following the debate week, and then continue to see above-average sales over the weeks after the winner announcement.

Volume Sold – Winner Comparison

	Christmas		Shortlist announced		Winner announced	
	February Lisa Moore	The Orenda Joseph Boyden	Ru Kim Thúy	The Illegal Lawrence Hill	Fifteen Dogs André Alexis	Forgiveness Mark Sakamoto
						
Week	2013	2014	2015	2016	2017	2018
1	2	1,358	43	2,355	402	5
2	1	1,138	29	3,050	558	0
3	5	2,239	65	3,971	992	0
4	3	2,878	75	2,987	175	0
5	16	4,293	97	810	220	4
6	66	4,831	45	901	189	4
7	682	2,208	37	626	190	3
8	240	1,116	31	924	202	70
9	307	680	256	850	781	576
10	133	632	284	968	705	637
11	88	556	356	872	800	547
12	140	644	420	861	1,028	567
13	149	539	377	1,621	1,373	622
14	144	617	355	2,520	1,407	534
15	249	987	382	2,912	1,215	521
16	606	2,465	464	2,850	1,391	740
17	3,013	8,278	2,135	5,562	3,416	2,740
18	1,374	7,078	1,395	5,516	2,422	1,538
19	1,837	5,077	1,251	3,716	1,534	1,074
20	2,054	3,941	1,695	3,105	1,282	1,440
21	1,663	3,418	1,561	2,789	1,213	1,352
22	1,093	2,584	1,499	2,606	1,036	1,214



Conclusion

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

- Being shortlisted for Canada Reads has a notable and consistent effect on the market share of a title. In 2018, as with previous years, sales increased significantly for all five nominated titles following the shortlist announcement. As the shortlist announcement occurred after the holiday season, when overall consumer behaviour is on a decline, the positive increase in sales can be attested to the publicity garnered from the shortlist announcement.
- Debate week has a positive impact on sales for all nominees. In previous years, nominees voted off earlier in the week experienced less of an impact than those who made it to the end of the week. However, this trend was not observed in 2017 or 2018.