



BNC RESEARCH

A RESEARCH REPORT BY BOOKNET CANADA

BNC RESEARCH

10.2018

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 2013 and 2017.

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 2017 Scotiabank Giller Prize shortlisted titles by volume sold and includes a look at sales in the overall fiction market 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 2017 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 2013 to 2017, 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 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 2017

Volume Sold

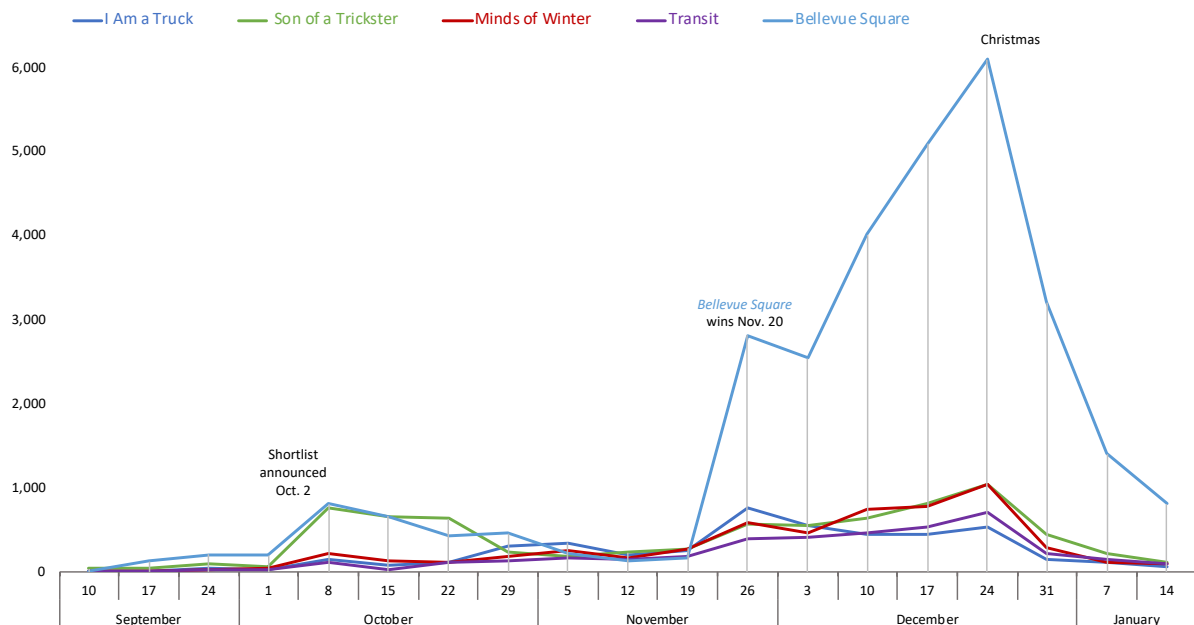
Organized by Scotiabank

Nominations announced: Oct. 2, 2017

Winners announced: Nov. 20, 2017

Winner: *Bellevue Square*

		Shortlist announced	Winner announced	Christmas					
									
		<i>I Am a Truck</i>	<i>Son of a Trickster</i>	<i>Minds of Winter</i>	<i>Transit</i>	<i>Bellevue Square</i>	Overall Unit Sales	2017 Market Fiction	Week number
September	10	0	35	3	8	0	46	258,138	1
	17	1	31	2	7	123	164	273,413	2
	24	30	93	27	26	198	374	266,964	3
October	1	14	59	34	18	190	315	291,789	4
	8	140	749	206	107	806	2,008	286,208	5
	15	68	648	128	27	655	1,526	245,075	6
	22	111	625	115	103	426	1,380	250,514	7
	29	291	221	171	124	455	1,262	256,971	8
November	5	341	176	246	156	213	1,132	274,404	9
	12	192	228	164	147	128	859	266,646	10
	19	255	270	264	183	165	1,137	271,657	11
	26	754	558	579	379	2,804	5,074	309,988	12
December	3	544	550	450	412	2,534	4,490	345,692	13
	10	432	639	736	459	4,006	6,272	388,016	14
	17	445	804	774	526	5,082	7,631	445,765	15
	24	519	1,031	1,030	694	6,090	9,364	570,786	16
	31	144	436	279	216	3,201	4,276	279,743	17
January	7	102	210	111	135	1,395	1,953	216,868	18
	14	49	110	92	97	799	1,147	212,234	19



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 (Oct. 2, 2017):

In 2017, nominated titles experienced an average increase in units sold of 433% after the shortlist announcement, fairly similar to the 426% increase the previous year. Undeniably, just being nominated has an immediate impact on sales.

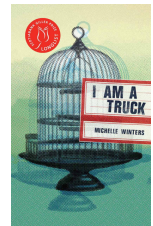
Winner announcement (Nov. 20, 2017):

All titles experienced an average percent change of 382%. The winning title experienced a sales increase of 1402% after the winner announcement, continuing to rise after winning and peaking the week before Christmas. Shortlisted titles also peaked before Christmas, suggesting that the Giller Prize positively influences consumer behaviour for the nominated titles during the holiday season.

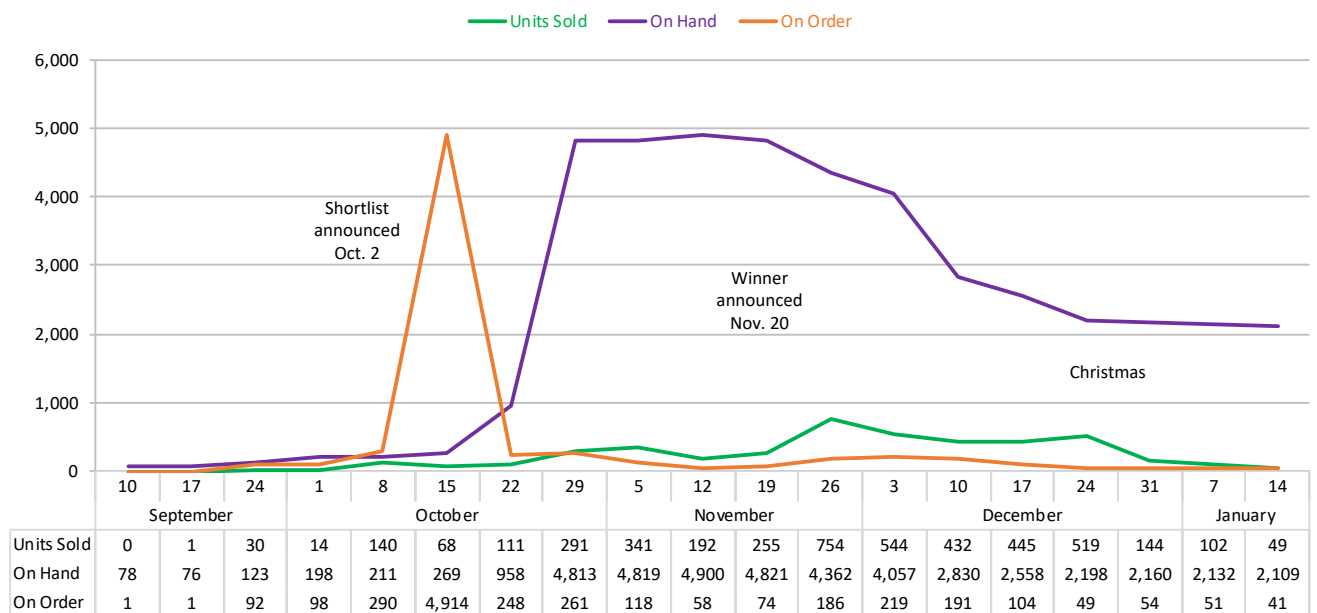
Nominee

Michelle Winters' *I Am a Truck*

Invisible Publishing
Trade Paperback
9781926743783
\$19.95



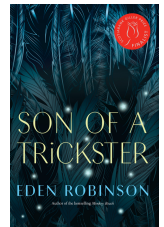
Sales vs. On Hand vs. On Order



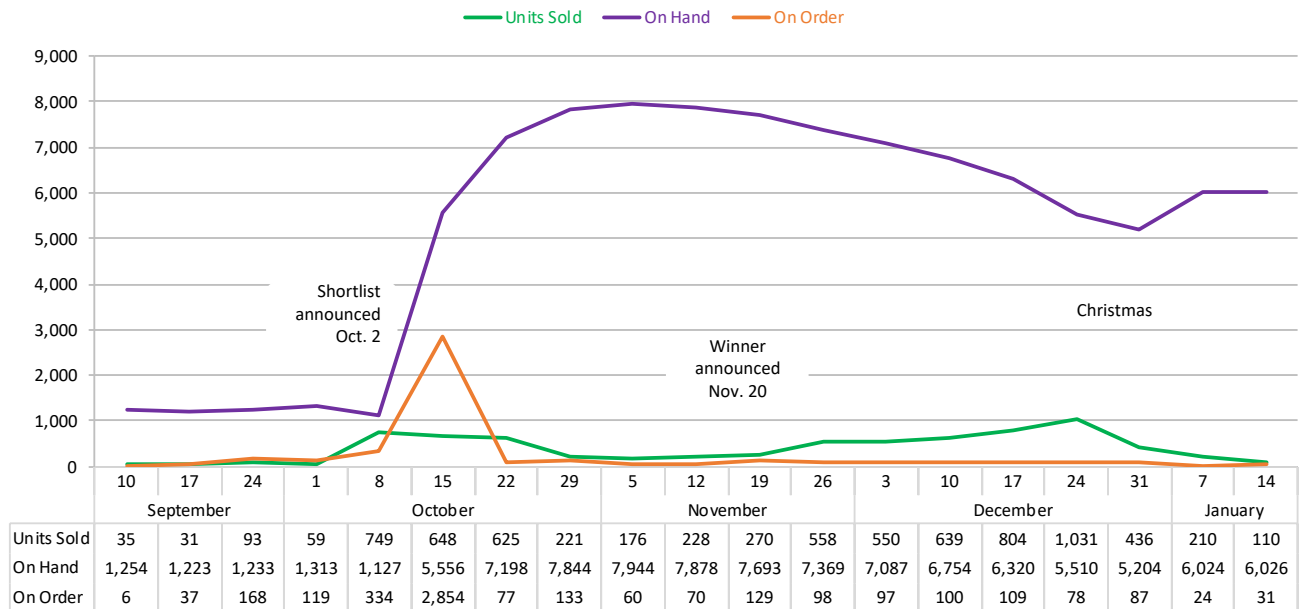
Nominee

Eden Robinson's *Son of a Trickster*

Knopf Canada
Hardcover Trade
9780345810786
\$32.00



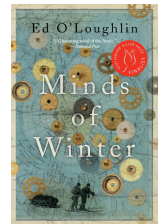
Sales vs. On Hand vs. On Order



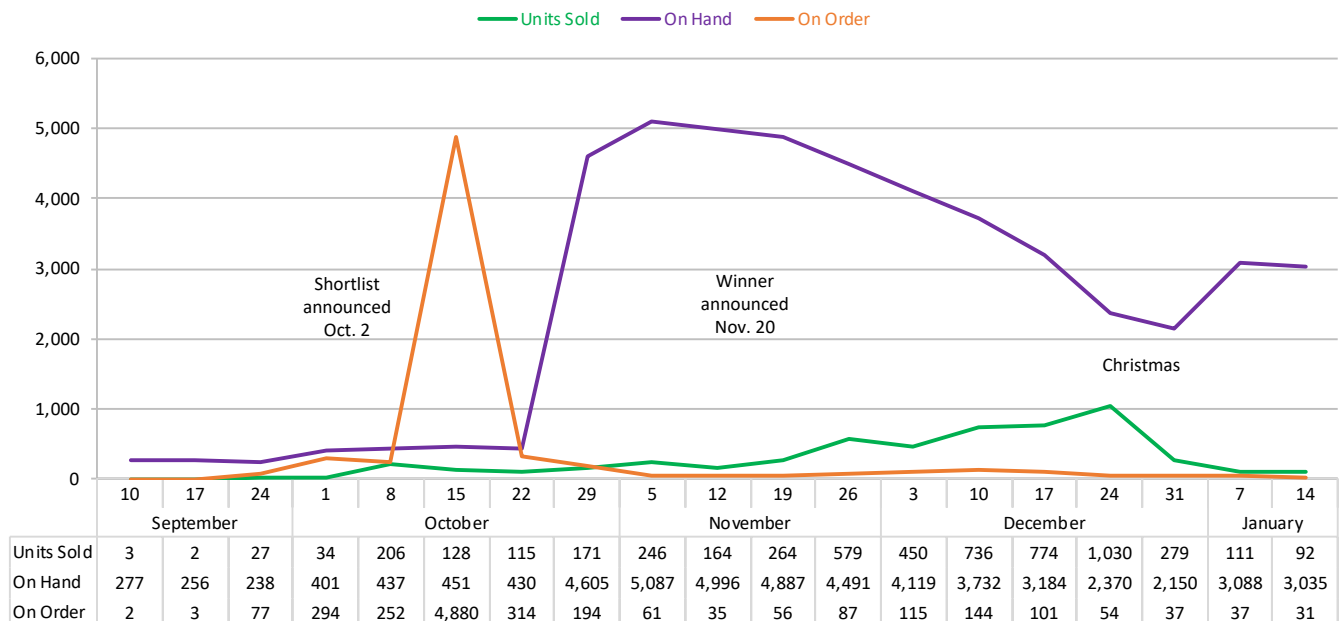
Nominee

Ed O'Loughlin's *Minds of Winter*

House of Anansi Press
Trade Paperback
9781487002343
\$22.95



Sales vs. On Hand vs. On Order



Nominee

Rachel Cusk's *Transit*

HarperCollins Publishers

Trade Paperback

9781443456029

\$21.99

Hardcover Trade

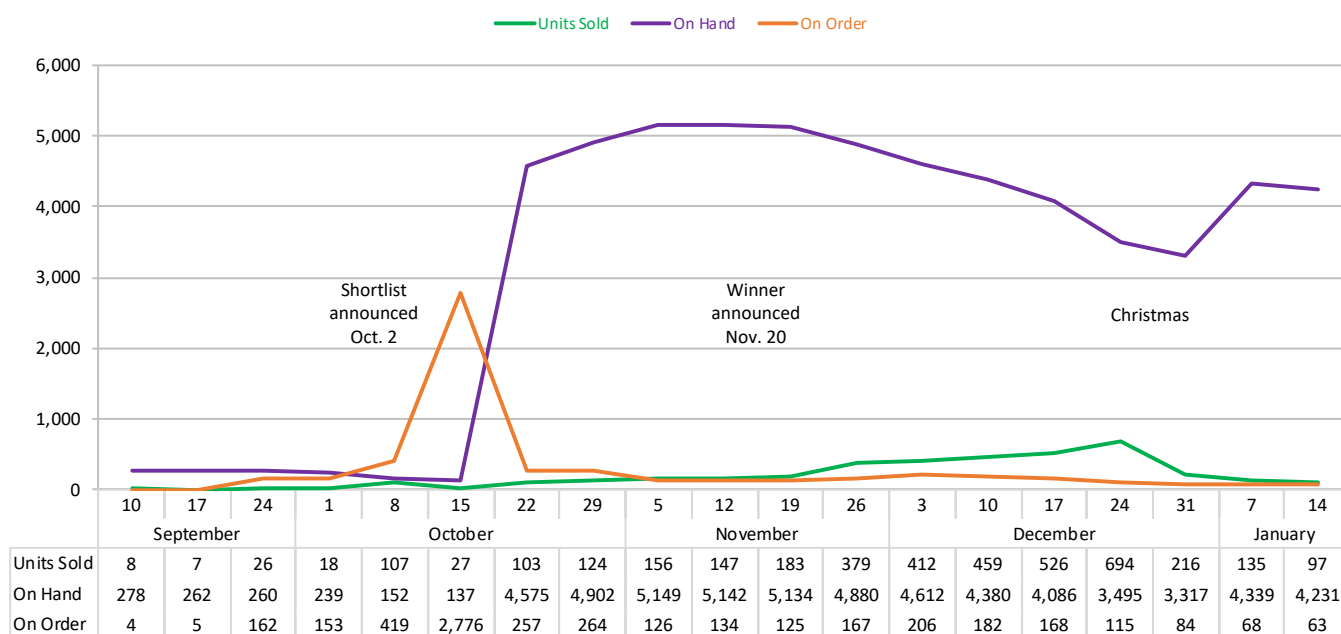
9781443447126

\$29.99



Sales vs. On Hand vs. On Order

**Unit sales include both hardcover and paperback editions combined.*

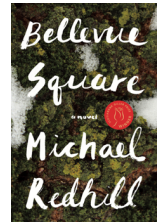


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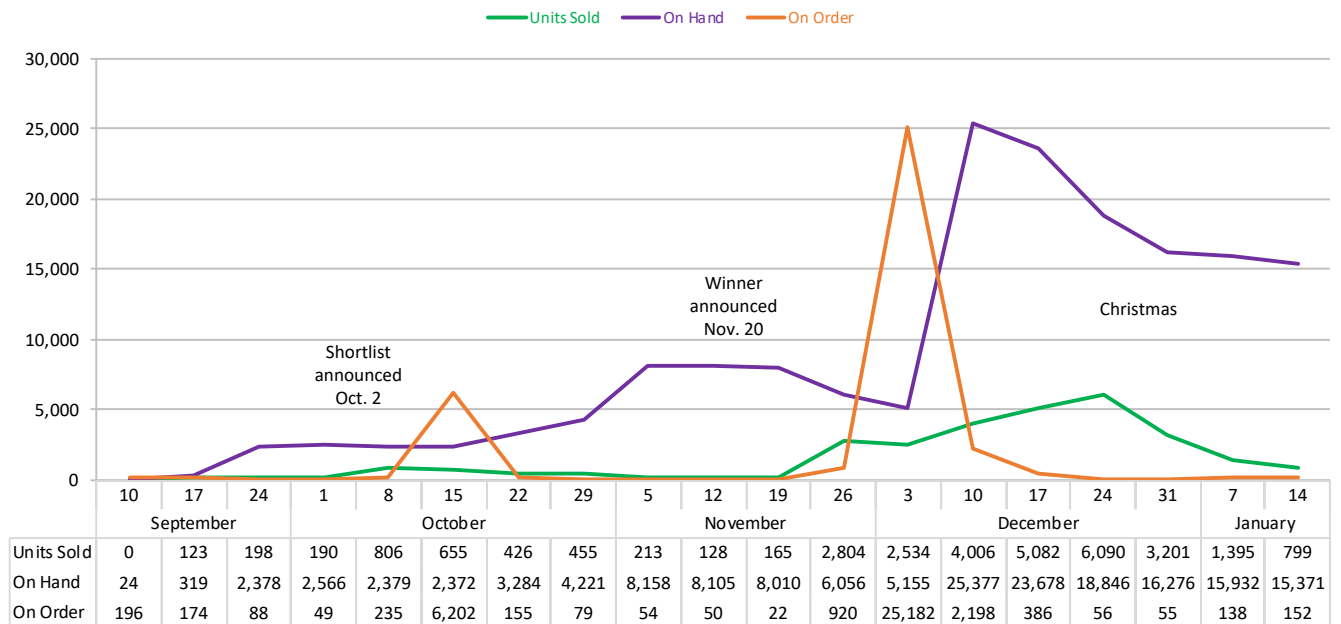
Winner

Michael Redhill's *Bellevue Square*

Doubleday Canada
Hardcover Trade
9780385684835
\$32.00



Sales vs. On Hand vs. On Order



Winner Comparison 2013-2017

2017

Michael Redhill's *Bellevue Square*

Doubleday Canada

Hardcover Trade | 9780385684835 | \$32.00

2015

André Alexis' *Fifteen Dogs*

Coach House Books

Trade Paperback | 9781552453056 | \$19.95

2013

Lynn Coady's *Hellgoing: Stories*

House of Anansi

Trade Paperback | 9781770893085 | \$19.95

2016

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

Knopf Canada

Hardcover Trade | 9780345810427 | \$35.00

2014

Sean Michaels' *Us Conductors*

Random House of Canada

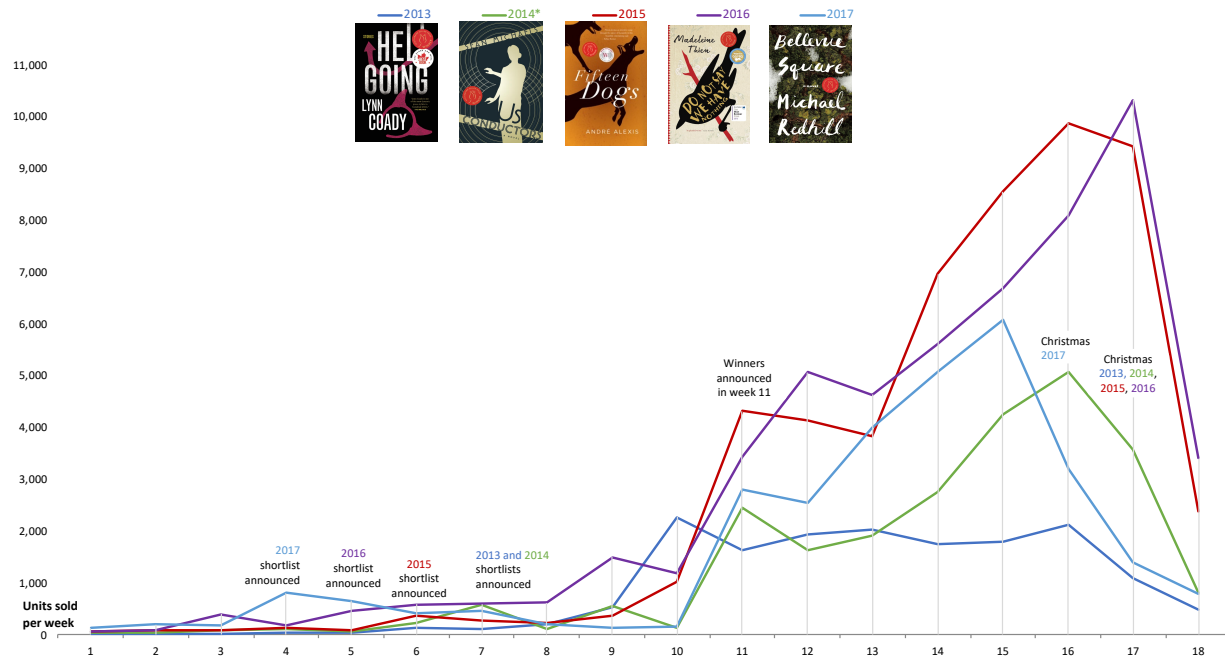
Hardcover Trade | 9780345815767 | \$26.00

Trade Paperback | 9780345813329 | \$24.95

Winner Comparison – Volume Sold

	Christmas	Shortlist announced	Winner announced		
				<i>Hellgoing</i> Lynn Coady	<i>Us Conductors</i> Sean Michaels
				<i>Fifteen Dogs</i> André Alexis	<i>Do Not Say We Have Nothing</i> Madeleine Thien
				<i>Bellevue Square</i> Michael Redhill	
					
					
					
Week	2013	2014*	2015	2016	2017
1	13	44	53	52	123
2	20	32	79	92	198
3	24	93	90	395	190
4	35	107	131	185	806
5	34	56	84	470	655
6	142	225	356	583	426
7	106	589	283	595	455
8	193	121	237	622	213
9	526	554	357	1,496	128
10	2,265	136	1,018	1,195	165
11	1,627	2,453	4,315	3,441	2,804
12	1,929	1,643	4,131	5,066	2,534
13	2,026	1,901	3,826	4,629	4,006
14	1,758	2,749	6,961	5,610	5,082
15	1,796	4,256	8,554	6,687	6,090
16	2,123	5,072	9,882	8,091	3,201
17	1,101	3,577	9,420	10,317	1,395
18	491	810	2,377	3,405	799

*Unit sales include both hardcover and paperback editions combined.



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Winning titles from the last five years tend to follow similar sales patterns. *Bellevue Square*, like previous winners, experienced increased sales during the holiday season, followed by a post-holiday decline.

Of all the winners, Madeleine Thien's *Do Not Say We Have Nothing* sold the most copies during the 18-week period.

Conclusion

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

- Nominated titles tend to see a sales increase the week of 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.
- Format may have less influence on sales volume than previously suspected — while sales for André Alexis' *Fifteen Dogs* suggest that the lower price point for trade paperbacks may result in more sales, the award has seen titles that are not synonymous with this trend.