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ISBN: 978-1-927655-66-5 | ISNI: [0000000107013646](#)

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Introduction

The State of Publishing in Canada 2021 marks the seventh edition of BookNet Canada's State of Publishing industry survey, fielded every other year. Formerly [The State of Digital Publishing in Canada](#) and following *The State of Publishing in Canada 2019*, this new edition of the study continues to expand its focus and monitor the health of publishers in Canada.

Offering a comprehensive look at the Canadian English-language publishing landscape, this study includes data from Canadian-based publishers of all sizes and explores publishers' operations and staffing; revenue and sales; distribution; format-specific publishing programs; and the impact of the COVID-19 pandemic.

Methodology

This study includes data from BookNet Canada's survey *The State of Publishing in Canada 2021*, linked in [Appendix A](#).

This survey was developed with the support of many from the Canadian book industry. BookNet Canada would like to thank and acknowledge Dani MacDonald, the Association of Canadian Publishers' Research and Communications Manager, who helped gather reviewers for the survey's draft, and those who graciously reviewed the questionnaire:

- Lorene Shyba (Publisher, Durvile & UpRoute Books);
- Jessica Albert (Digital & Art Director, ECW Press); and
- Leslie Bootle (Marketing Director, Orca Book Publishers).

The survey was fielded via online survey platform from March to July 2022, querying Canadian-based publishers about their performance in 2021. It was emailed directly to over 100 publishers in Canada, promoted through BookNet Canada's online email and social media communication channels, and shared with industry organizations and associations.

Altogether, aggregated responses from 78 publishers are included in this study. According to [SalesData](#), BookNet Canada's national sales tracking service for the

Canadian English-language trade book market, the publishers included in this study represent approximately 72% of the English-language print book market. SalesData itself is estimated to cover 85% of the Canadian trade print book market.

As in past studies, publishers have been segmented based on their self-reported gross revenue and have been accorded the terms “small,” “mid-sized,” and “large”:

- Small: \$0 - \$999,999
- Mid-sized: \$1M-\$9,999,999
- Large: \$10M or more

In *The State of Publishing in Canada 2021*, 65% of respondents fall within the small publishers category, 26% in the mid-sized publishers category, and 9% in the large publishers category.

Throughout this study:

- Sample sizes of questions vary based on the number of responses.
- Percentages are rounded to the nearest whole number.
- Percentages may add up to more than 100% for questions where respondents could select more than one response.
- Year-over-year comparisons to prior surveys are shared whenever possible.

This study was prepared by BookNet Canada staff.

Highlights

Publishers

- Most survey respondents were small publishers, with a 2021 gross revenue under \$1M (65%).
- Publishers that had been in business for more than 35 years made up the largest share of respondents.
- The majority of publishers saw an increase in revenue between 11% and 25% in 2021.
- Publishers had an average of 19.5 full time and 8.8 part time employees.
- The biggest hiring and staffing concerns or challenges in 2021 were money, retention, and COVID.

Publishing books

- Most respondents focused on the trade market (89%) — specifically adult trade (38%).
- Almost all the publishers we surveyed sold their books directly to consumers (90%).
- Between 2020 and 2021, print book revenue increased for most Canadian publishers (61%).
- The average return rate in 2021, as a percentage of books shipped for all trade publishers, was 16%.
- In 2021, revenue from digital books was approximately 40% frontlist and 60% backlist.
- Over half of all publishers saw increases in ebook revenue in 2021 (52%).
- Just over a quarter of all publishers saw increases in audiobook revenue in 2021 (28%).

Accessibility

- Just over half of respondents provided 76% to 100% of their frontlist titles as accessible EPUBs (52%) and a quarter provided accessible PDFs (25%).

- In 2021, 95% of the publishers who produced ebooks used at least one accessibility feature or process, compared to 87% in 2019.
- In 2021, the most popular accessibility features publishers included in their audiobooks were ensuring all replication of all content from the print book (25%), writing and recording image descriptions (21%), and using accessibility metadata (10%).

Diversity

- Of the publishers that responded to the survey, 38% had diversity targets in 2021.
- Of the diversity targets set or reached in 2021, most publishers are excited about collaborating with authors (45%), hiring staff (31%), and publishing diverse titles (17%).

Marketing

- Publishers' most successful marketing strategies in 2021 were related to social media (21%), events (19%), and videos (15%).
- Social media remains popular, with most publishers having accounts and being active on Facebook (99%), Twitter (90%), and Instagram (85%).

Industry perceptions and reflection

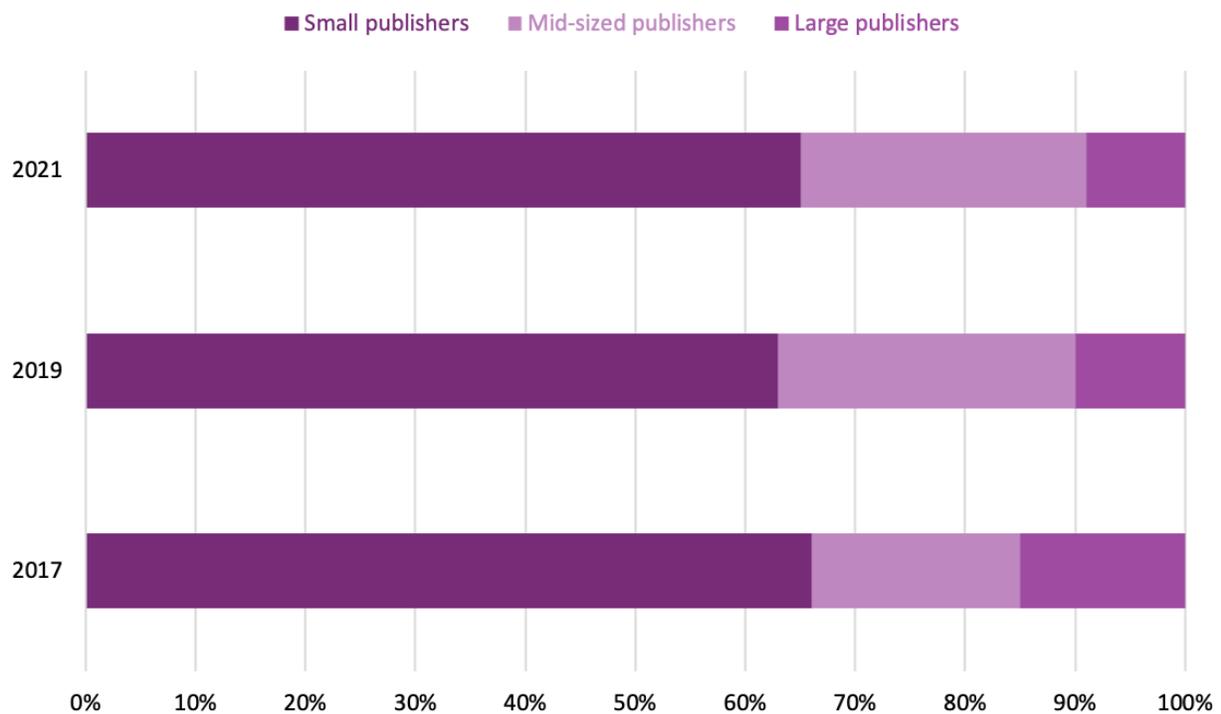
- In 2021, publishers were most proud of their sales (28%), titles (28%), and navigating COVID-19 (26%).
- On the flipside, the biggest pain points for publishers in 2021 were printing (27%), shipping (20%), and operational challenges (19%).
- Overall, most publishers described the health of their company as excellent in 2021 (49%), based on their ability to withstand challenges, adapt, and change.

Profile of publishers

As mentioned in the introduction, 78 publishers responded to our State of Publishing survey, which represents approximately 72% of the Canadian English-language trade print book market.

As we found in past studies, these publishers were mainly small operations. (For our purposes, we have classified small publishers as those with a gross revenue between \$0 and \$999,999.) In 2021, they made up just under two-thirds of respondents (65%). The mid-sized publishers (those with a gross revenue between \$1M and \$9,999,999) continued to make up just over a quarter of respondents (26%), and large publishers (gross revenue of \$10M or more) again made up the smallest share of respondents at 9% in 2021, shown in the graph below.

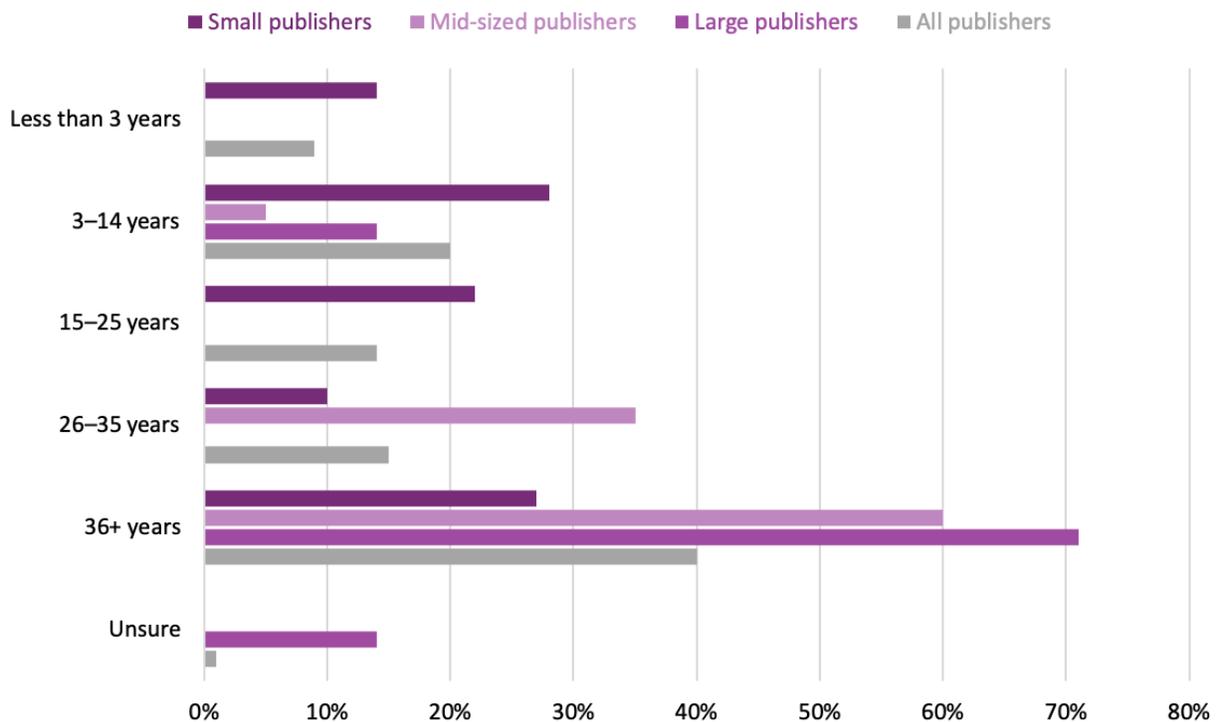
Canadian publishers by revenue size, 2017–2021



(n=78)

The graph below shows the age of publishing companies who responded to the survey. Most of the publishers we surveyed (40%) had been in business for 36 years or more, which was increasingly true for mid-sized and large publishers. The length of time that small publishers had been in business varied the most by far and 73% of this category have been in business for less than 36 years.

Age of Canadian publishing companies, 2021



(n=78)

For the 9% of publishers who opened their business between January 2018 and December 2021, they equally cited “serving authors” and “supporting diverse voices” as motivations for launching their operations, at 45% each. Perhaps unsurprisingly for such new publishing houses, these publishers all fell within the small category.

If you have opened a new publishing house/press between January 2018 and December 2021, what influenced this decision? What were your motivations?

- We opened in September 2021 because we noticed several excellent writers, authors, and even books could not get published or printed. We saw a lot of talent not being utilized by larger publishers. (Small publisher)
- We are authors who decided we needed to publish the books that we write. (Small publisher)
- We started as an author services company in 2010 but now wanted to have full editorial control over the books we produced. (Small publisher)
- To publish books, games, and toys that celebrate Black Canadians and multiculturalism. (Small publisher)

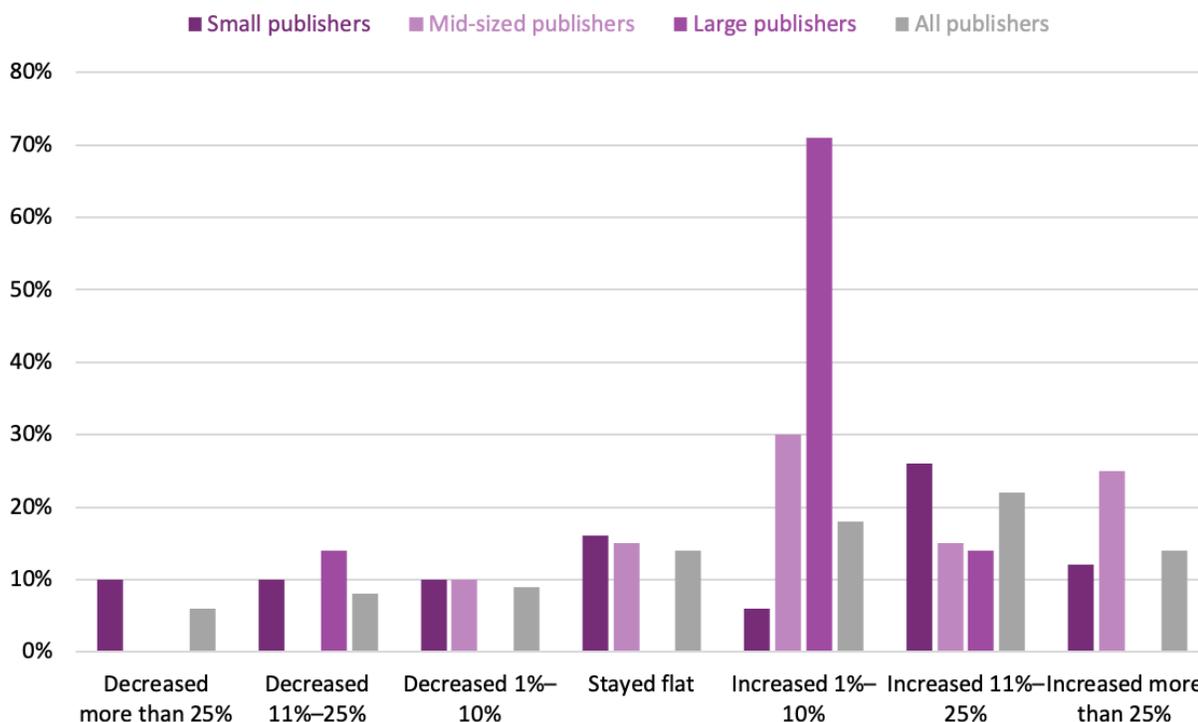
Revenue

[According to Statistics Canada's recent publication, *Adjusting to life in a pandemic: Embracing culture, arts and other leisure services in 2021*](#), book publishers have adapted throughout the pandemic but the "industry has not yet reached the level of revenue seen before the pandemic," though "it is not far off." When comparing pre-pandemic revenue to revenue in 2021, book publishing falls just behind the three culture, arts, and leisure businesses that have made a full recovery — film, television and video post-production; sound recording; and golf courses and country clubs.

For the publishers who responded to our survey, 55% saw an increase in revenue in 2021 compared with 2020, 14% reported their revenue stayed flat, and 23% reported a decrease. The graph below shows the change in revenue for publishers of all sizes in 2021. The largest share of publishers reported an increase of 11–25% in 2021 (22%). For small publishers, this 11–25% increase bracket was where the

biggest share found themselves at 26%, but for mid-sized and large publishers, they were mostly in the 1–10% increase bracket at 30% and 71% respectively.

Changes in gross revenue for Canadian publishers, 2021

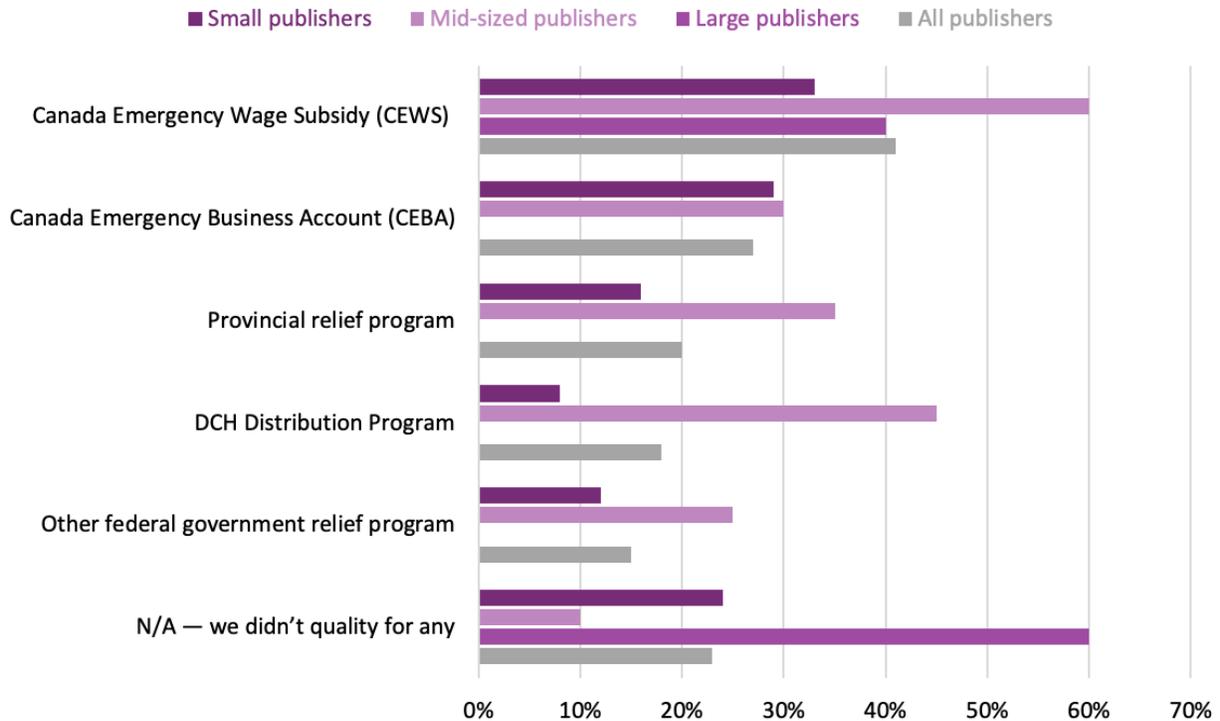


(n=77)

A new source of revenue for publishers since our 2019 survey were COVID-19 governmental assistance programs. The most used assistance programs by all publishers in 2021 were the Canada Emergency Wage Subsidy (41%), the Canada Emergency Business Account (27%), and provincial relief benefits (20%), shown in the graph below.

Only 23% of publishers answered that they didn't qualify for any such programs in 2021 and large publishers benefited the least from COVID-19 governmental assistance programs.

Canadian publisher-awarded COVID-19 governmental assistance programs, 2021

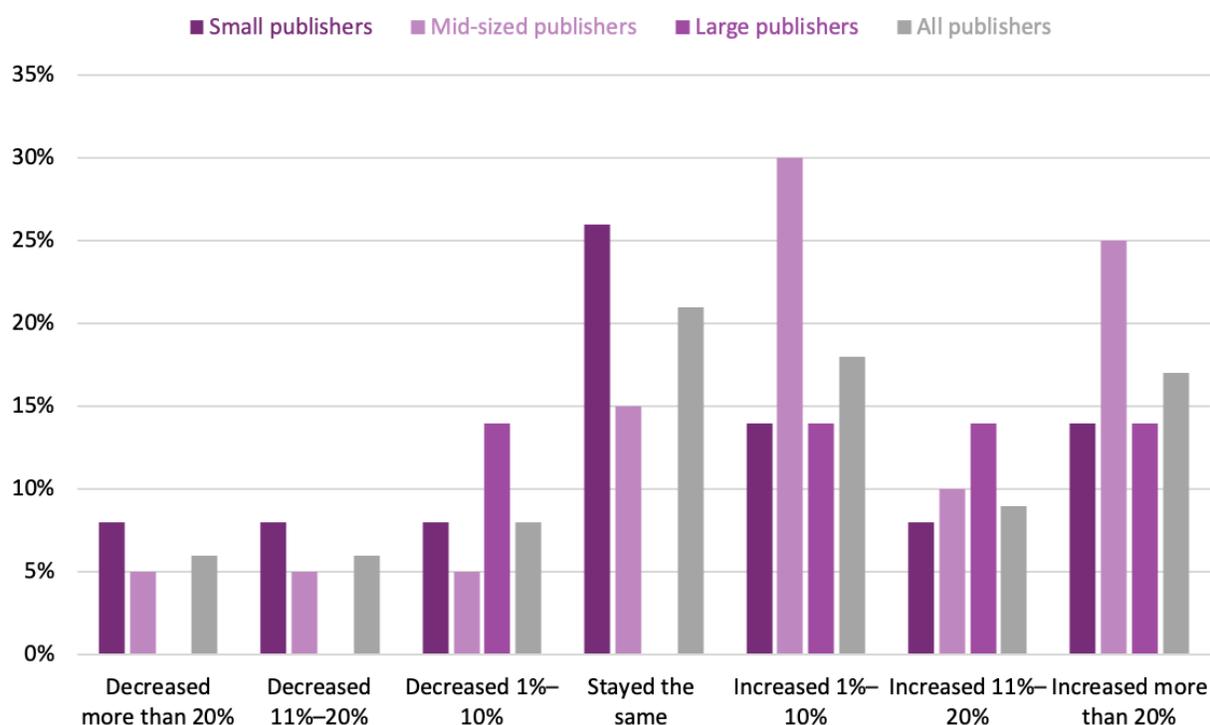


(n=74)

Looking outside of Canada to international revenue streams, on average, publishers estimated that 31% of their gross revenue was from sales in international markets. Mid-sized publishers reported the highest percentage of revenue from international sales at an average of 43%.

The graph below shows the change in international revenue for all Canadian publishers in 2021. For those publishers who sold to international markets, most reported that their revenue from these sales either stayed the same (21%) or increased (18%) from 2020 to 2021.

Changes in international revenue for Canadian publishers, 2021



(n=77)

Location and associations

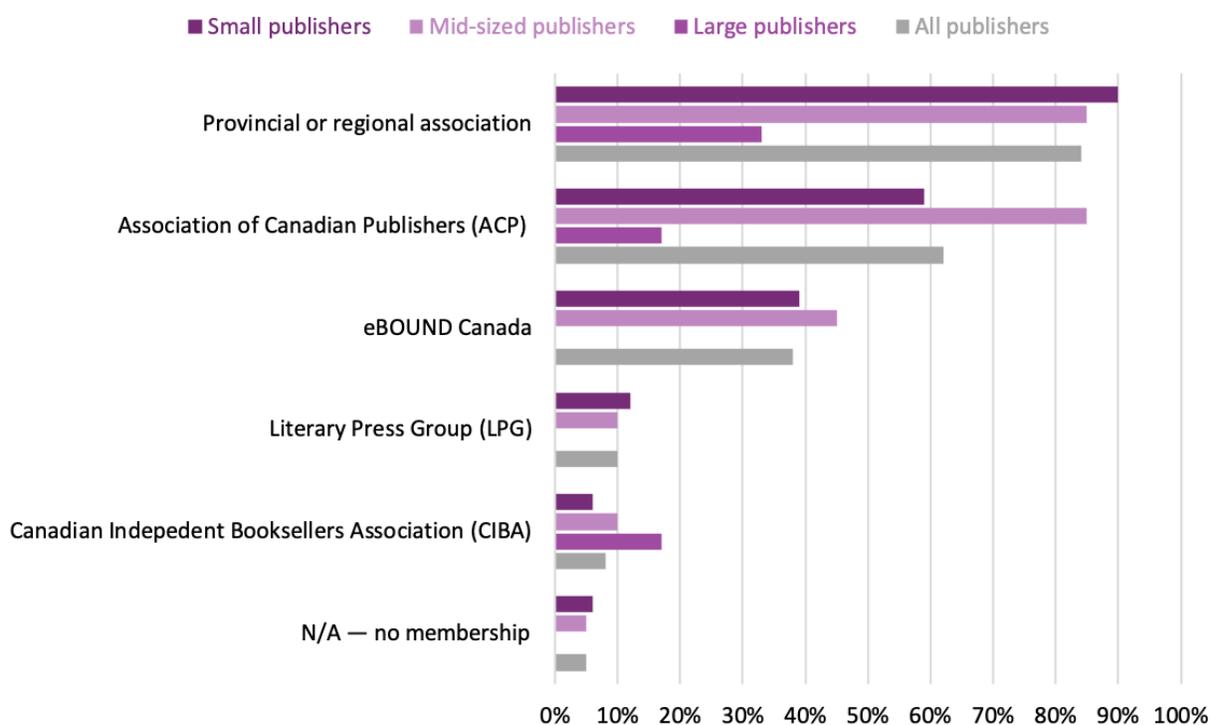
In terms of where respondents had their base of operations, most publishers we surveyed were located in either Ontario (36%) or British Columbia (24%). All large publishers who responded to the survey were based in Ontario, while small publishers were the most likely of the three groups to be based in provinces and territories other than Ontario and British Columbia.

The vast majority of publishers belonged to one or more associations (95%). Most belonged to their provincial or regional association (85%); 62% belonged to the Association of Canadian Publishers; and 38% were eBOUND Canada members. The smaller the publishing house, the more likely they were to be members of provincial or regional associations — 90% of small publishers and 85% of mid-sized publishers. By contrast, only large publishers were members of the Canadian

Publishers’ Council, and at 67% membership it was that group’s most popular association.

The graph below shows the top five most popular associations across all publishers in 2021. These numbers are similar to what we found in 2019, though the overall membership has risen to 95% of publishers holding membership in one or more organizations in 2021 from 90% in 2019.

Memberships held by Canadian publishers, 2021



(n=77)

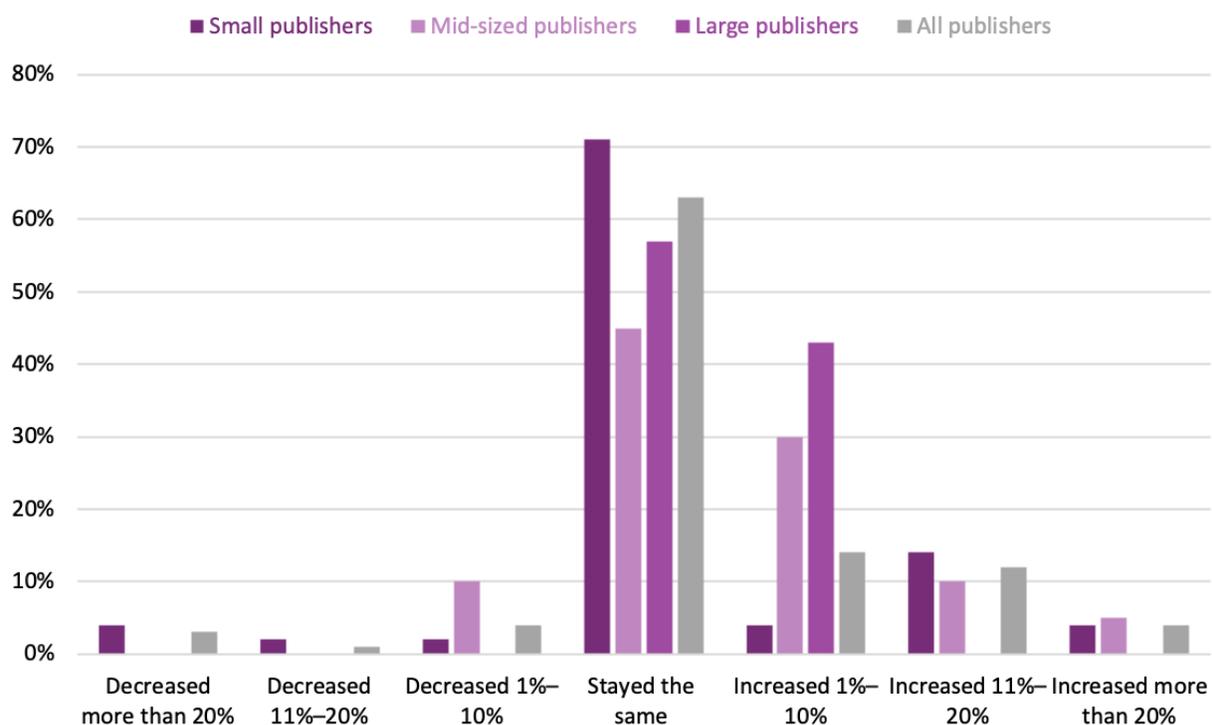
Staffing and employees

Out of all publishers who responded to the survey, respondents had an average of 19.5 full time and 8.8 part time employees. This staff make-up stayed flat for 63% of publishers between 2020 and 2021 — staff count increased for 30% of publishers and decreased for just 8% of publishers.

If we get more granular and look at this based on our small, mid-sized, and large publishing company categories, we see that staff counts go up as the revenues of the publishers increase. In 2021, small publishers had an average of 2.6 full time and 2.2 part time staff; mid-sized publishers had an average of 15.4 full time and 2.8 part time staff; large publishers had 140.1 full time and 68.6 part time staff on average.

This change in headcount was also distributed differently among the different sized publishers, shown in the graph below. Small publishers were most likely to have not seen a change in staffing when compared to larger companies (71%), while more mid-sized and large publishers saw an increase of 1–10% in staff — 30% and 43% respectively.

Changes in staffing for Canadian publishers, 2021

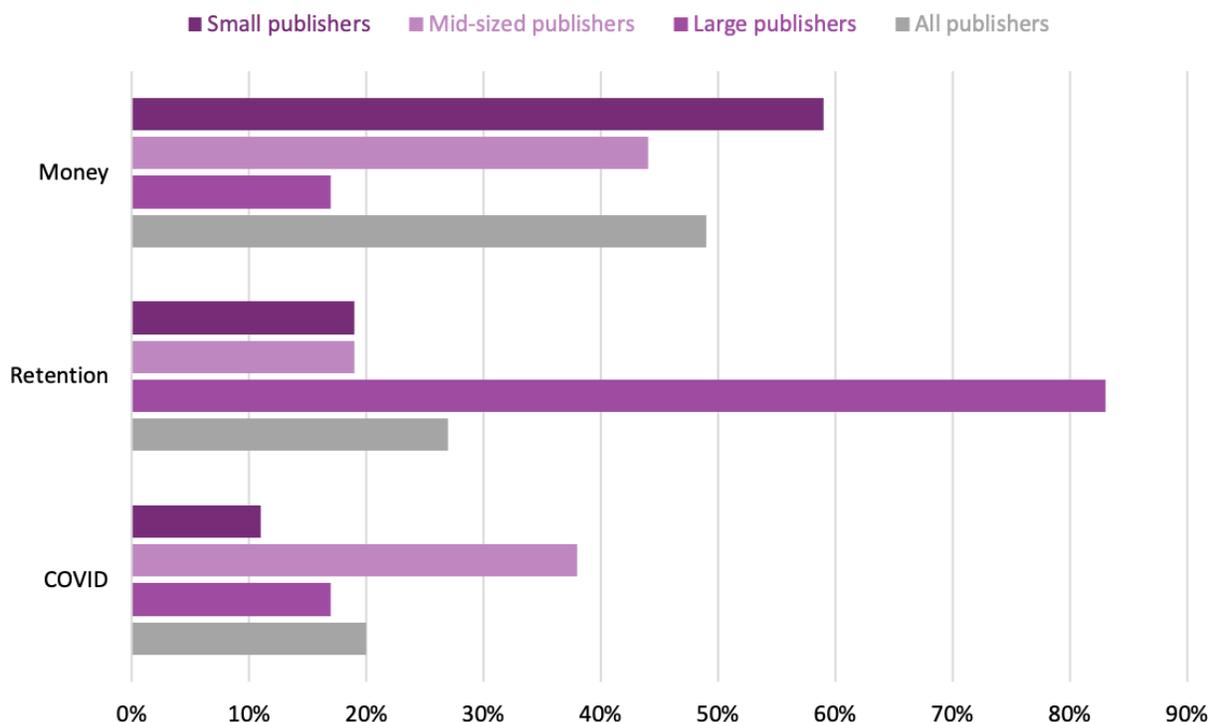


(n=78)

The graph below shows the top challenges that publishers faced with regards to staffing in 2021. In 2021, the main concern that publishers identified when it came to hiring and staffing was related to money — payroll, salaries, and inflation. Almost half of publishers (49%) identified this as their main concern. This was even more of a challenge for small publishers, at 59%.

Large publishers, however, identified retention, turnover and recruitment as a primary concern — 83% of them did so. Mid-sized publishers also identified COVID as a particular challenge (38%), a close second to their top concern, money at 44%.

Top three staffing challenges for Canadian publishers, 2021



(n=49)

What were your company's main hiring or retention concerns or challenges in 2021?

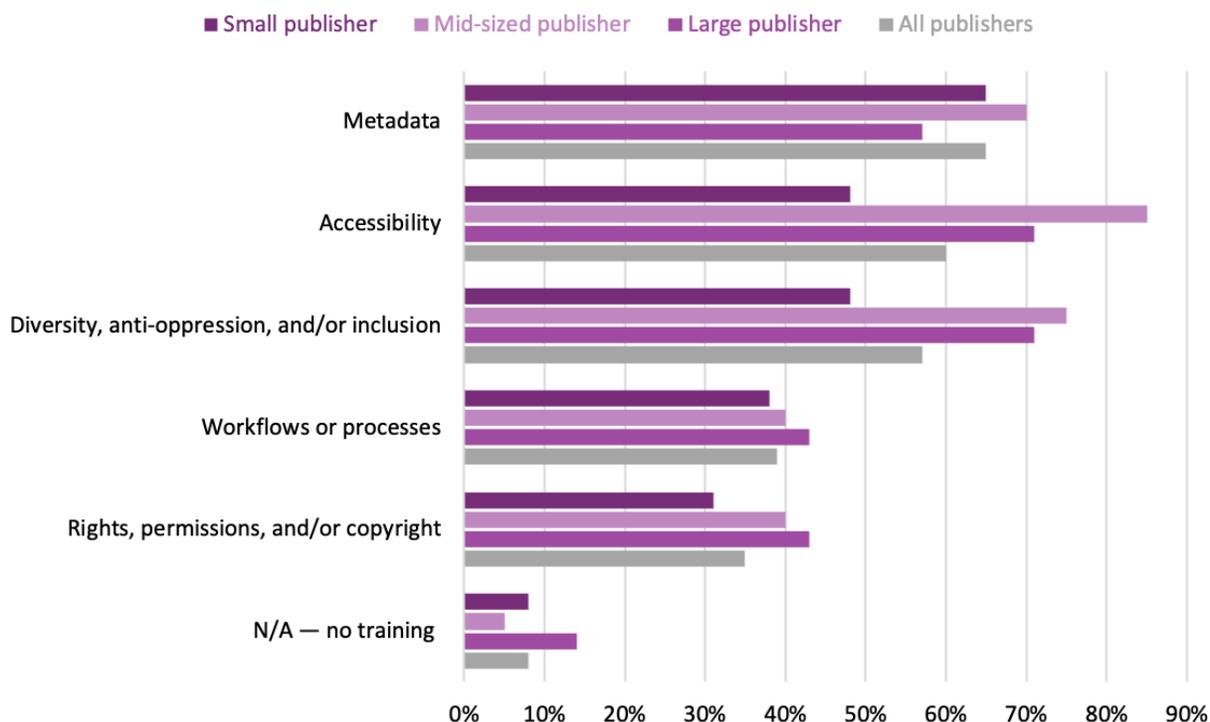
- DEI related factors have been important elements of new hiring. Onboarding, retaining staff, maintaining overall mental health while working remotely - staying connected - has been a priority. (Mid-sized publisher)
- Inflation is becoming a concern. Workload for senior staff is higher than ideal. (Mid-sized publisher)
- Owner doesn't draw a salary, but we make sure we pay freelancers even though funds are tight and we were able to do that throughout. (Small publisher)
- Freelancers had too much work. Hard to afford their rates or get the time investment I need from them. (Small publisher)
- Staff turnover, and restructuring roles within the company was challenging. (Small publisher)
- Our desire to hire tech and data professionals. There aren't enough for the demand and they're expensive. Very tricky to fit into publishing company budget. In other roles, there are higher salaries for employees looking for a job outside the industry. We can't control for that. (Large publisher)

Training and development

The vast majority of publishers provided training and professional development to their staff in 2021 (92%). Across publishers of all sizes, the three most popular topics that staff training addressed were metadata (65%), accessibility (60%), and diversity (57%), shown in the graph below.

Mid-sized publishers provided the most accessibility training (85%) while small publishers focused more on marketing and publicity (10%) than the other two groups. Large publishers were more likely to train their staff on workflows and processes (43%); and rights, permissions, and/or copyright (43%), but they were also more likely not to provide any training at all (14%).

Training and professional development provided by Canadian publishers, 2021



(n=75)

As to where companies received training or education, the most popular providers in 2021 were provincial or regional associations (61%), the Association of Canadian Publishers (61%), and BookNet Canada (55%).

Publishing books

Most publishers reported that the market focus that best described the books they published in 2021 was trade, at 89%. This was up from 81% in 2019. Only 8% focused on scholarly/higher education titles in 2021. In the 2019 edition of this survey, we found that 10% focused on scholarly/professional titles and 8% on higher education.

When we break down trade publishing further, the numbers remain consistent with 2019's results. The most popular trade segments in 2021 were Adult trade titles (38%), followed by Literary titles (18%), Children's books (16%), and Young Adult and Children's (4%). There were a further 14% who reported focusing on all trade segments evenly, a focus that increased with publisher size — 6% for small publishers, 20% for mid-sized publishers, and 43% for large publishers.

In 2021, publishers of all sizes also focused on publishing books by Canadian contributors — authors, editors, translators, and/or illustrators who are Canadian citizens or permanent residents of Canada. This was most true for small and mid-sized publishers — 96% and 97% of all the titles they published in 2021 were by at least one Canadian contributor.

Direct to consumer sales

Almost all the publishers we surveyed sold their books directly to consumers (90%). Small and mid-sized publishers sold directly to consumers the most, at 96% and 80% respectively. In contrast, only 43% of large publishers reported that they did direct sales.

Of those publishers that sold directly to consumers, the most popular ways were through the company's online store (86%), at author events (40%), and at fairs, conventions, or exhibitions (32%).

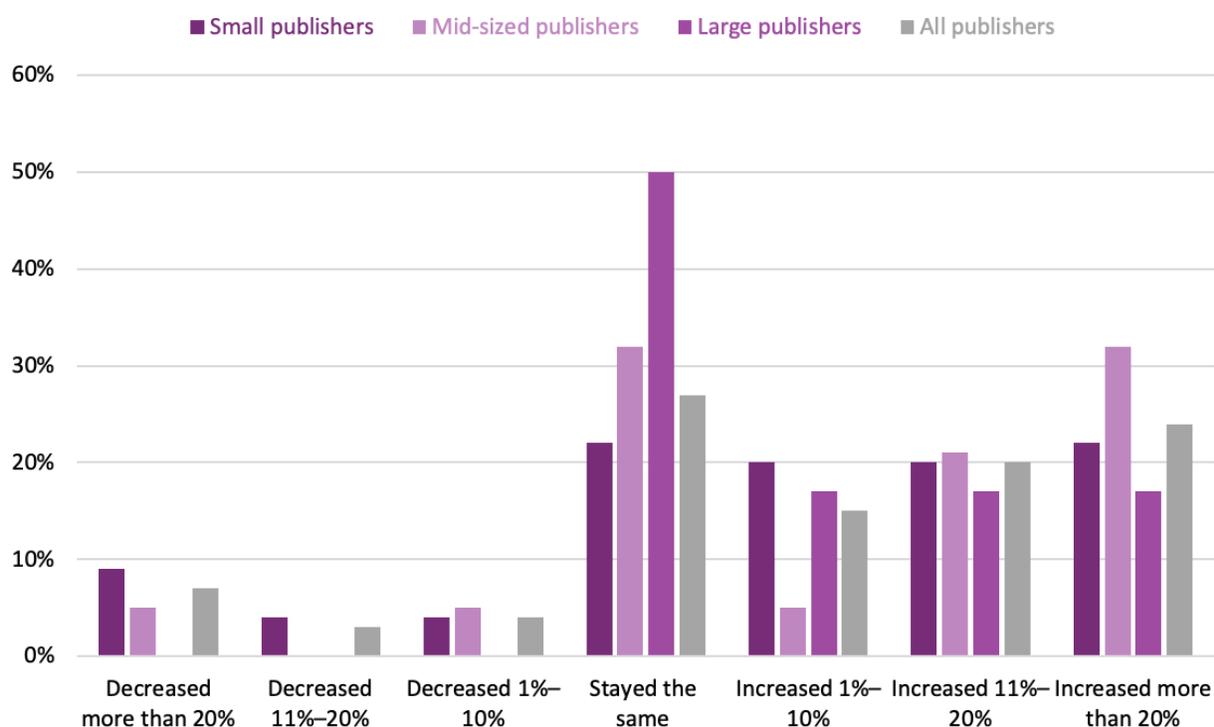
Direct to consumer sales channels for Canadian publishers, 2021



(n=73)

For most publishers, direct-to-consumer sales increased (59%) or stayed the same (27%) when comparing sales in 2021 to 2020. Large publishers were equally likely to have reported that their sales stayed the same from 2020 to 2021 (50%) as they were to have reported an increase (50%). For small publishers, 62% reported an increase of some kind, while 22% said they stayed the same and 58% of mid-sized publishers reported an increase while 32% said it stayed the same.

Changes in direct to consumer sales for Canadian publishers, 2021



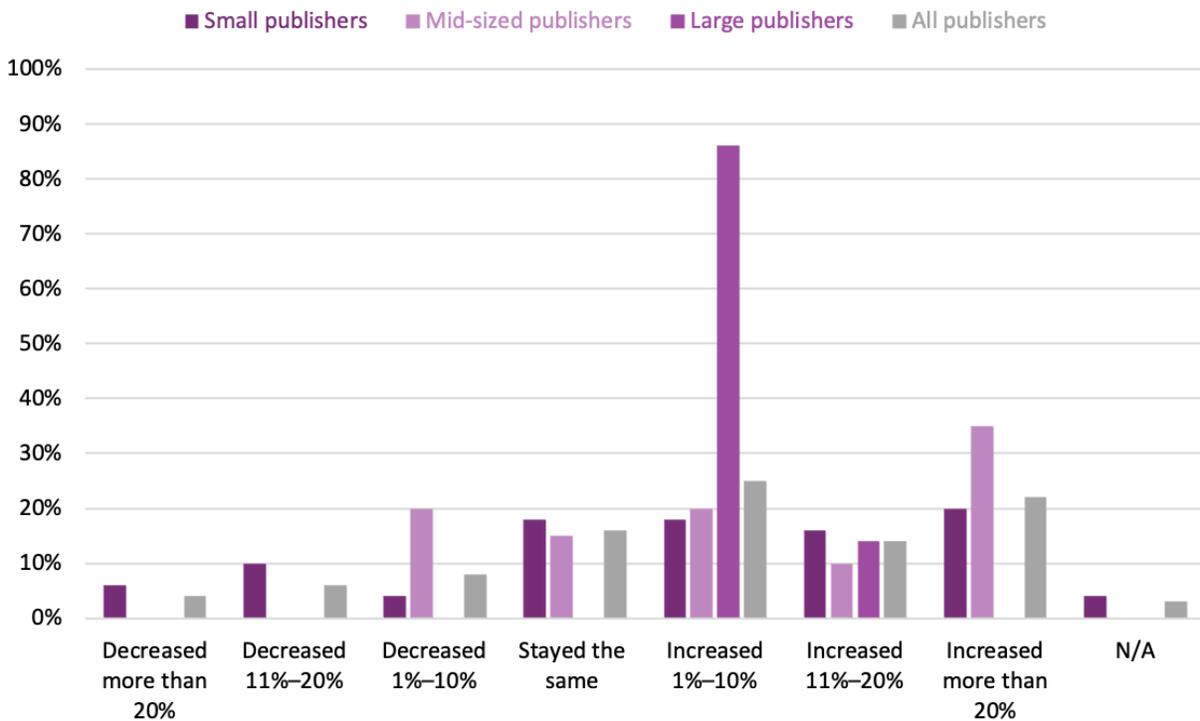
(n=71)

Print books

Between 2020 and 2021, print book revenue increased for most Canadian publishers (61%). The graph below shows the changes in revenue from print book sales across publishers of all sizes.

All large publishers we surveyed saw increases in revenue from print books in 2021 — 86% reported that print sales increased 1-10% and 14% reported an increase of 11-20%. Small and mid-sized publishers also saw increases in print book sales in 2021, with 20% of small publishers and 35% of mid-sized publishers even reporting sales increases of more than 20%. At the same time, print sales for 18% of small publishers and 15% of mid-sized publishers stayed the same year over year and 20% of both mid-sized and small publishers reported decreases in print book sales in 2021.

Changes in print book revenue for Canadian publishers, 2021



(n=77)

What percentage of 2021 gross Canadian print revenue was derived from selling to specific channels? As you might expect, retailers were at the top. In 2021, 29% of publishers reported that retailers, including subscription services, made up more than half of their print revenue, shown in the table below. Trade wholesale also made up over 50% of print revenue for 17% of publishers, while direct to the public sales made up over 50% of print revenue for 11% of publishers.

Print revenue by channel for all Canadian publishers, 2021

	Direct to the public	Retailers	Trade wholesale	Library wholesale	Academic	Professional	Other
0%	11%	8%	12%	7%	8%	28%	23%
1%–10%	43%	6%	22%	46%	54%	39%	34%
11%–20%	12%	12%	19%	17%	10%	4%	3%
21%–30%	7%	11%	10%	10%	8%	2%	6%
31%–40%	11%	17%	6%	1%	5%	0%	3%
41%–50%	4%	8%	6%	1%	0%	0%	0%
51%–60%	3%	8%	9%	1%	0%	0%	0%
61%–70%	1%	9%	1%	0%	2%	0%	0%
More than 70%	7%	12%	7%	1%	2%	0%	0%
Unsure	3%	8%	7%	7%	6%	9%	14%
N/A	0%	3%	1%	6%	6%	19%	17%

(n=76)

Comparing these numbers to 2019, the percentage of publishers reporting that trade wholesale made up over half of their sales remained fairly constant — 17% in 2021 and 16% in 2019. The percentage that reported their direct to public sales as

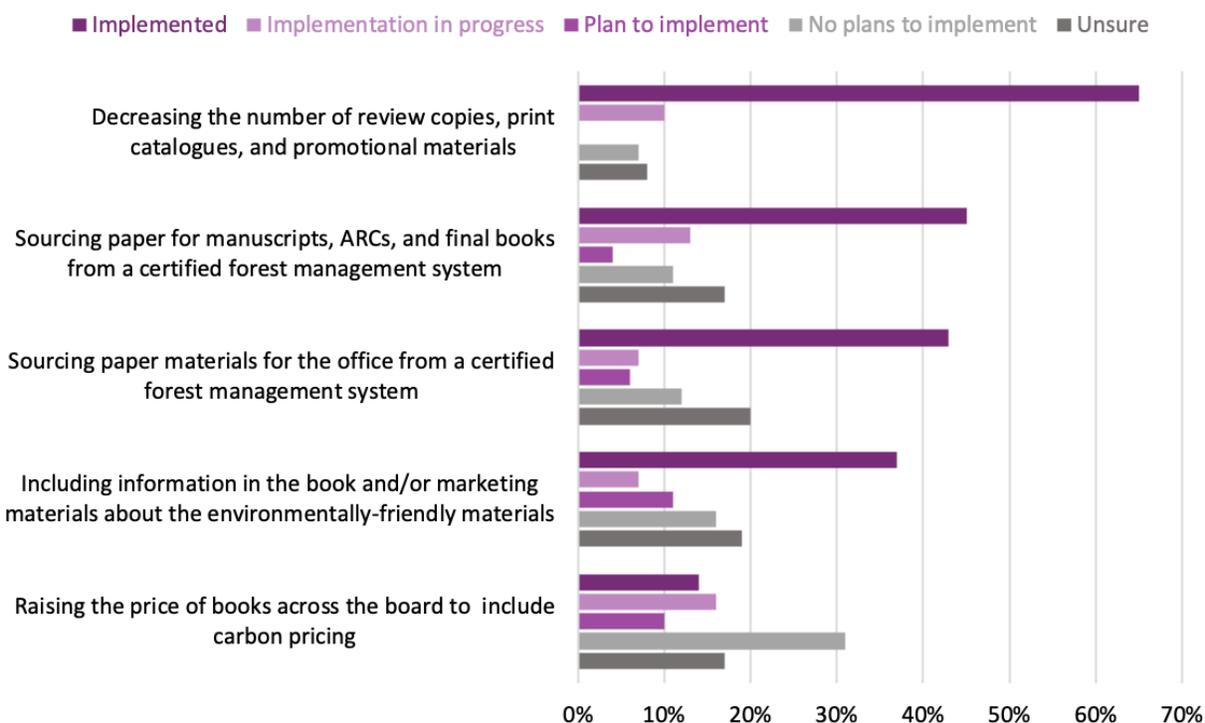
making up over 50% of their print revenue was also consistent — 11% in 2021 and 10% in 2019.

Three quarters of publishers produced their print books in-house (75%), though over half also used out-of-house freelancers (58%). Large publishers were least likely to use out-of-house freelancers at 29%, but were also the only respondents to have cover images designed by other territories (14%).

Canadian publishers of all sizes changed the way they produced print books in 2021, shown in the graph below. The most popular changes that had been implemented or were in progress in 2021 were:

- decreasing the number of review copies, print catalogues, and promotional materials to decrease waste and shipping and increase sustainability (75%);
- sourcing paper for manuscripts, ARCs, and final books from a certified forest management system and/or using 100% recycled paper (58%); and
- sourcing paper materials for the office from a certified forest management system and/or using 100% recycled paper (including for royalty statements and catalogues) (51%).

Print production changes for all Canadian publishers, 2021



(n=72)

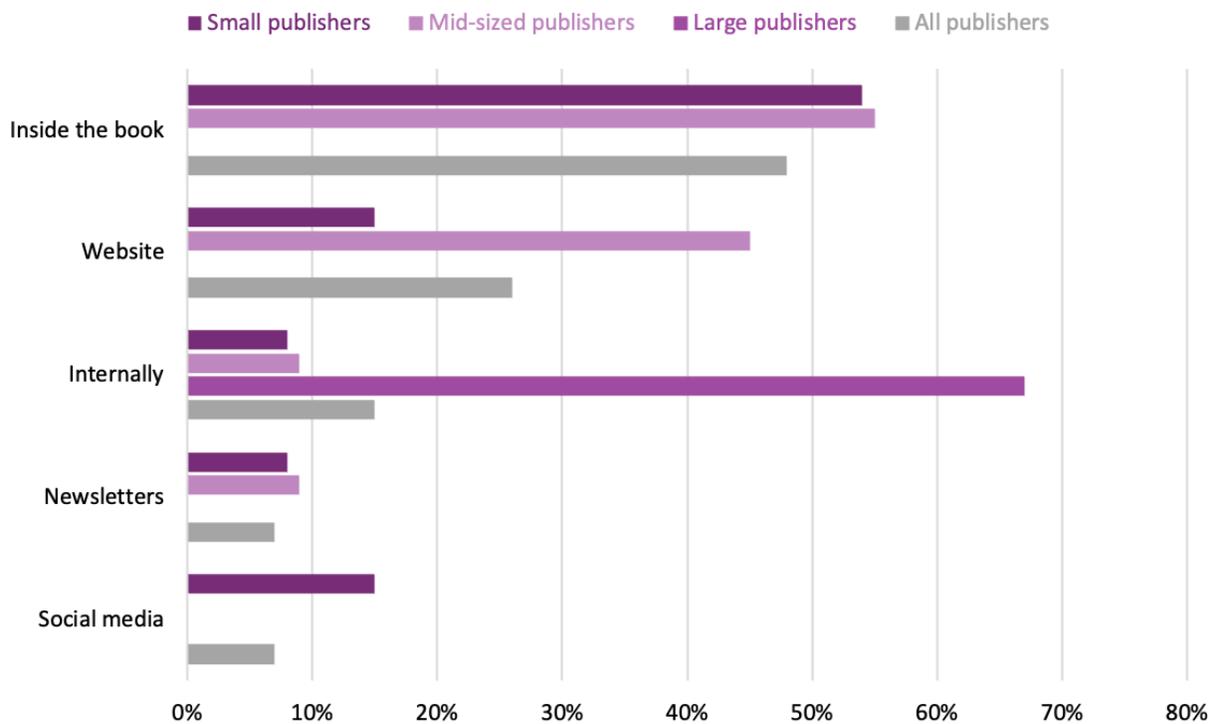
Just under a third of publishers had either implemented or were in the process of implementing a price increase for books across the board to include carbon pricing in order to increase profit margins and increase value/worth of books (30%). A further 10% had plans to do so in the future.

The percentage of small and mid-sized publishers who had implemented or were in the process of implementing higher prices for their books was similar at 32% each. However, fewer large publishers were raising prices — only 14% were in the process of or had implemented higher prices in 2021 and 29% of large publishers had no plans to increase their book prices. Just over a third of small publishers had no plans to increase prices (36%) and 21% of mid-sized publishers had no plan to do so either.

In 2021, 44% of all Canadian publishers had implemented or were in the process of including information in their print books or marketing materials about their use of environmentally-friendly materials. When it comes to how publishers share this information about their sustainability, most publishers share it inside the book itself (48%), on their website (26%), or do so internally within their company (15%), shown in the graph below.

Small publishers also share sustainability information on social media (15%) and some large publishers share sustainability information on request (33%).

Ways of sharing sustainability information by Canadian publishers, 2021



(n=27)

Most publishers reported wanting to do more about sharing their company's sustainability efforts.

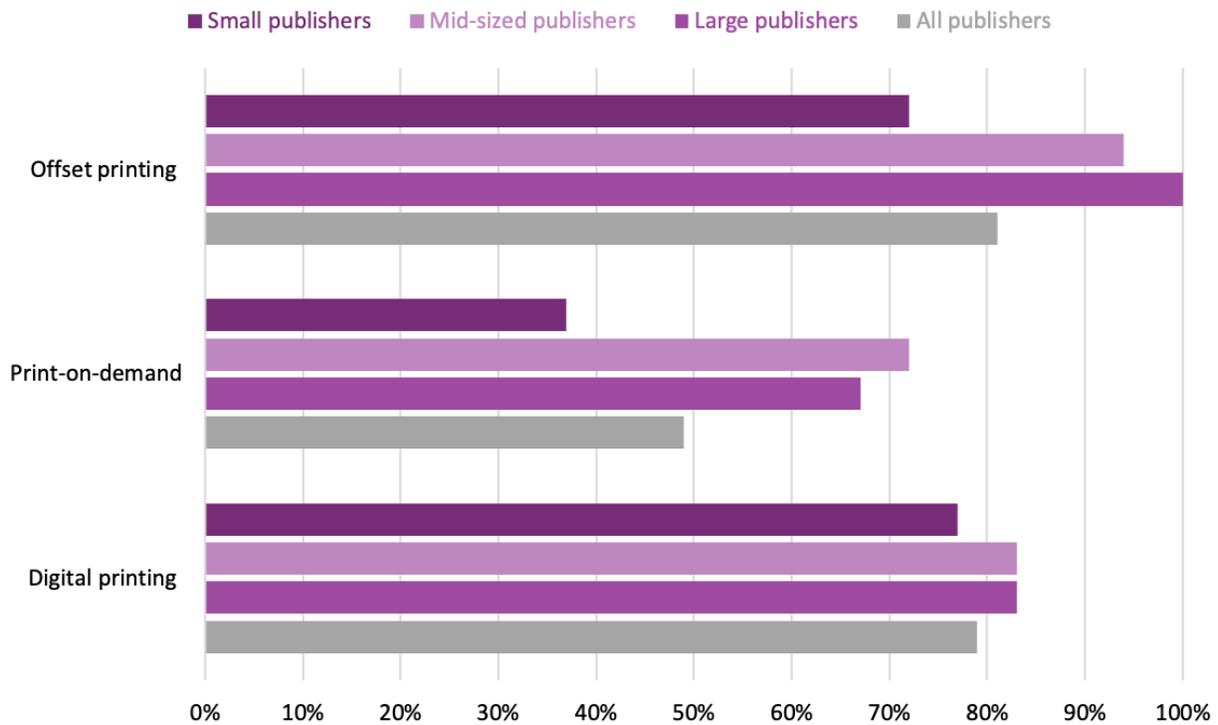
How did you share information about your company's sustainability initiatives to your customers in 2021? Is your company looking to change this method in the future?

- We are working on reporting for the website to give better detail of our sustainability initiatives. (Mid-sized publisher)
- Other than including "FSC Certified" logos in printed books when we're able to with the printers we use we haven't informed customers about our sustainability initiatives. Unless we do something really groundbreaking or notable we're unlikely to change this in the future. (Small publisher)
- We began including sustainability info in our books, and revamped our website's About Us page to include/explain our focus and processes. (Small publisher)
- We plan to share about our choices to print more in Canada through social media as well as through our sales representation. (Small publisher)

Printing

Most publishers used offset (81%) or digital printing (79%) to print their books in 2021, shown in the graph below. It was mid-sized publishers who were most likely to use print-on-demand (72%), while small publishers used it the least (37%). Perhaps unsurprisingly, large publishers were most likely to use offset printing — in fact 100% of large publishers used this method at some point in 2021 to print books.

Printing methods used by Canadian publishers, 2021

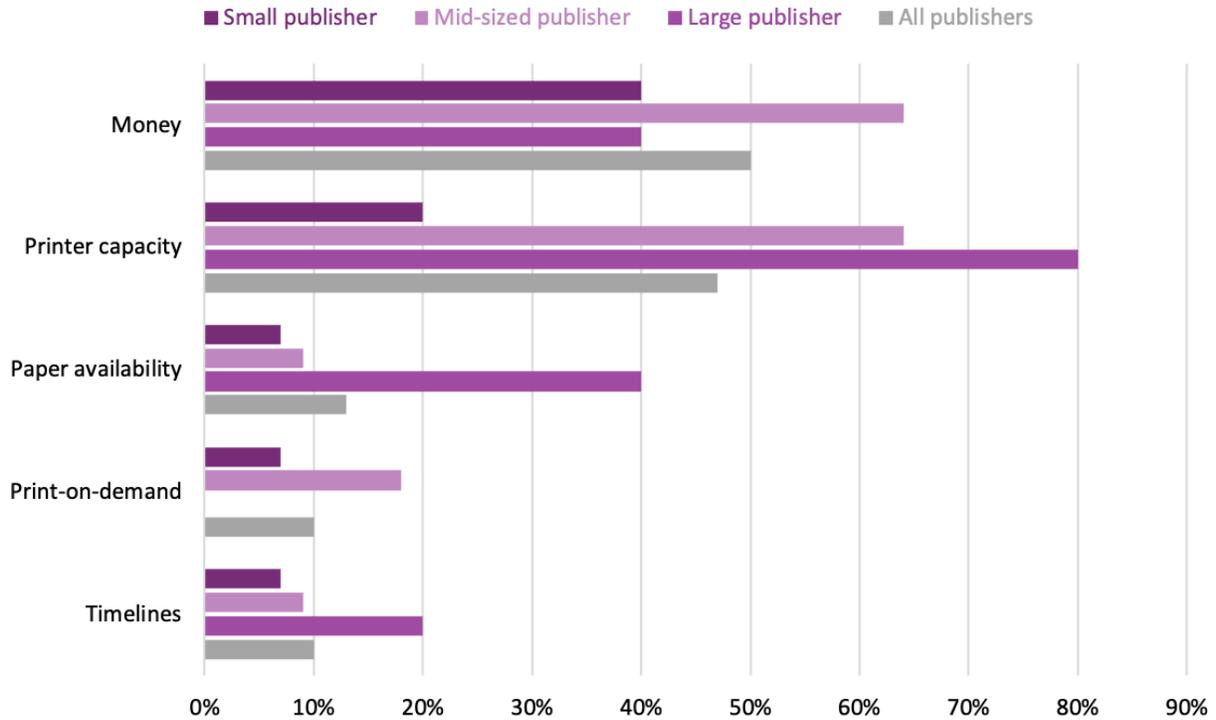


(n=67)

Most of the books printed by the publishers we surveyed were printed in Canada. On average, publishers reported that 75% of their printing was done in Canada, followed distantly by Asia (13%) and the United States (11%). On average, small publishers reported the largest percentage of their books printed in Canada (82%), followed by mid-sized publishers (75%). Large publishers, on average, printed most of their books in the United States (36%) and Asia (35%).

For publishers who considered moving their printing to Canada in 2021, the biggest factors were money (50%), printer capacity (47%), and paper availability (13%), shown in the graph below. Among large publishers, the concern was mainly the capacity of Canadian printers, 80%.

Factors considered by Canadian publishers looking to move their printing to Canada, 2021



(n=30)

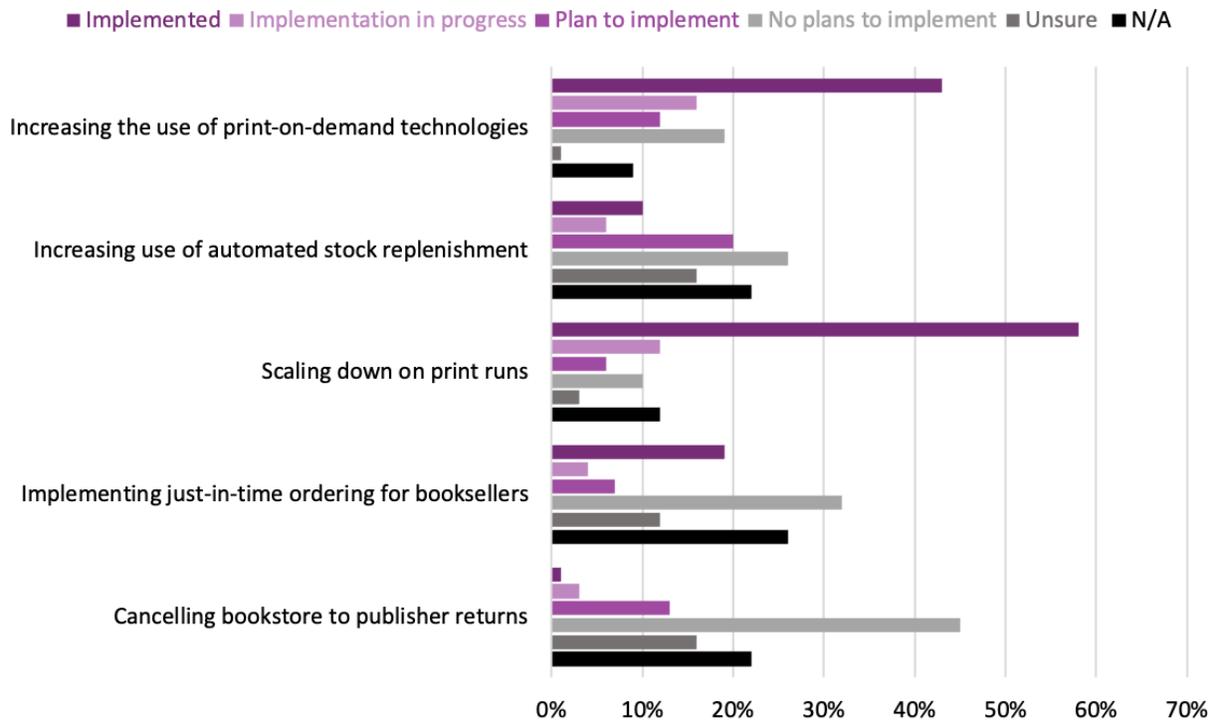
Is your company interested in moving more of your printing to Canada or your local region in the future? If so, what internal factors is your company considering in making this decision?

- We have been looking at moving as much as we can domestically, however, there are huge cost, capacity and paper constraints. (Large publisher)
- We have always wanted to print all of our books in Canada. Unfortunately, the costs of production, extended timelines, and limited capacity means that offshore is the only viable and affordable option. (Mid-sized publisher)
- We print all our books in Canada, though we may not be able to for much longer with the price increases. (Small publisher)
- Limitations of Canadian printers is an issue right now. They are over capacity and cannot manage reprints in a timely manner. Current work is being booked almost a year in advance and their costs are high. (Mid-sized publisher)

In 2021, many publishers made shipping and distribution changes by either implementing or starting the process of scaling down on print runs to decrease waste, mitigate risks, limit overstock, and increase efficiencies (70%). They also increased the use of print-on-demand technologies to increase efficiencies in distribution and storage (59%), as shown in the graph below. Two-thirds of all publishers either had no plans to implement or reported that cancelling bookstore to publisher returns to decrease print runs and shipping, and increase buy-to-sell strategic buying was not applicable to their business (67%).

These breakdowns are similar for small and mid-sized publishers. However, when we look at large publishers, 100% reported having implemented or being in the process of increasing the use of print-on-demand technologies to increase efficiencies in distribution and storage.

Shipping and distribution changes for all Canadian publishers, 2021



(n=69)

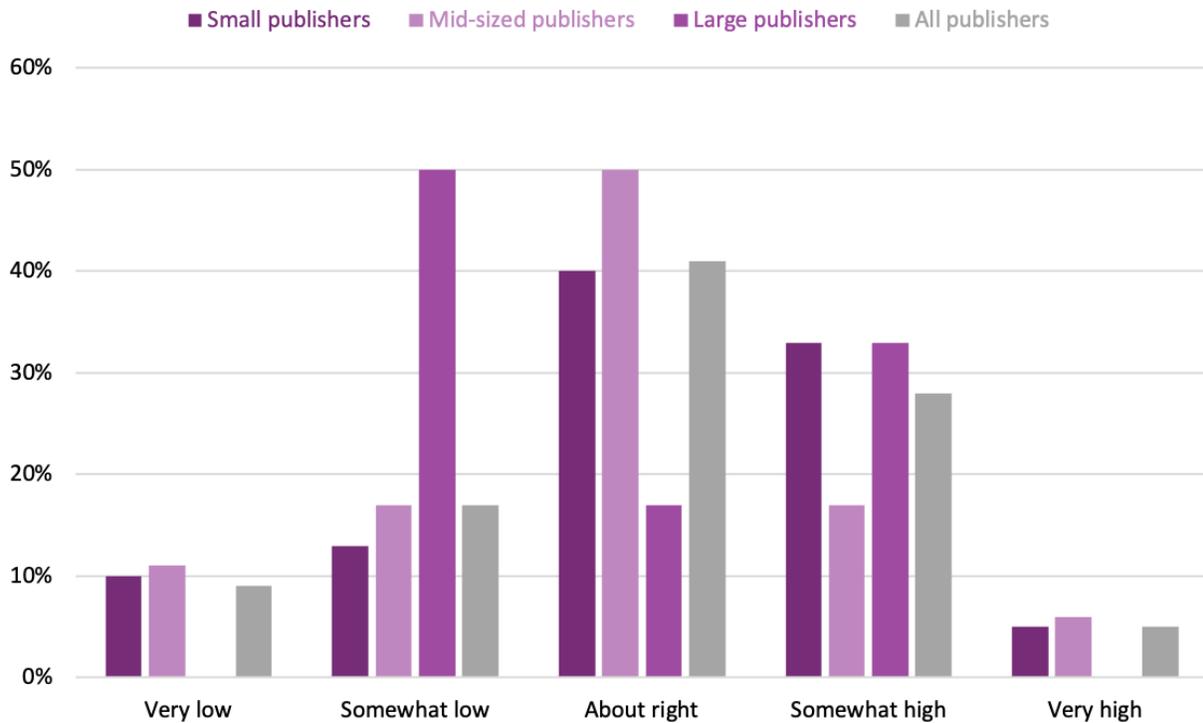
Returns

The average return rate in 2021, as a percentage of books shipped for all trade publishers, was 16%, down slightly from 17% in 2019. The rate of return for all publishers who responded to our survey was 14% — including all trade publishers, academic, and professional or corporate publishers.

Adult trade publishers had the highest rate of return at 19%. Of small publishers, academic publishers had the highest return rate, at 24%. For mid-sized publishers, adult trade titles were the most returned at 19%, and large publishers had the highest rate of return for trade Young Adult books (27%).

Publishers also rated their impression of the number of returns in 2021, shown in the graph below. Most publishers thought the return rate in 2021 was about right (41%).

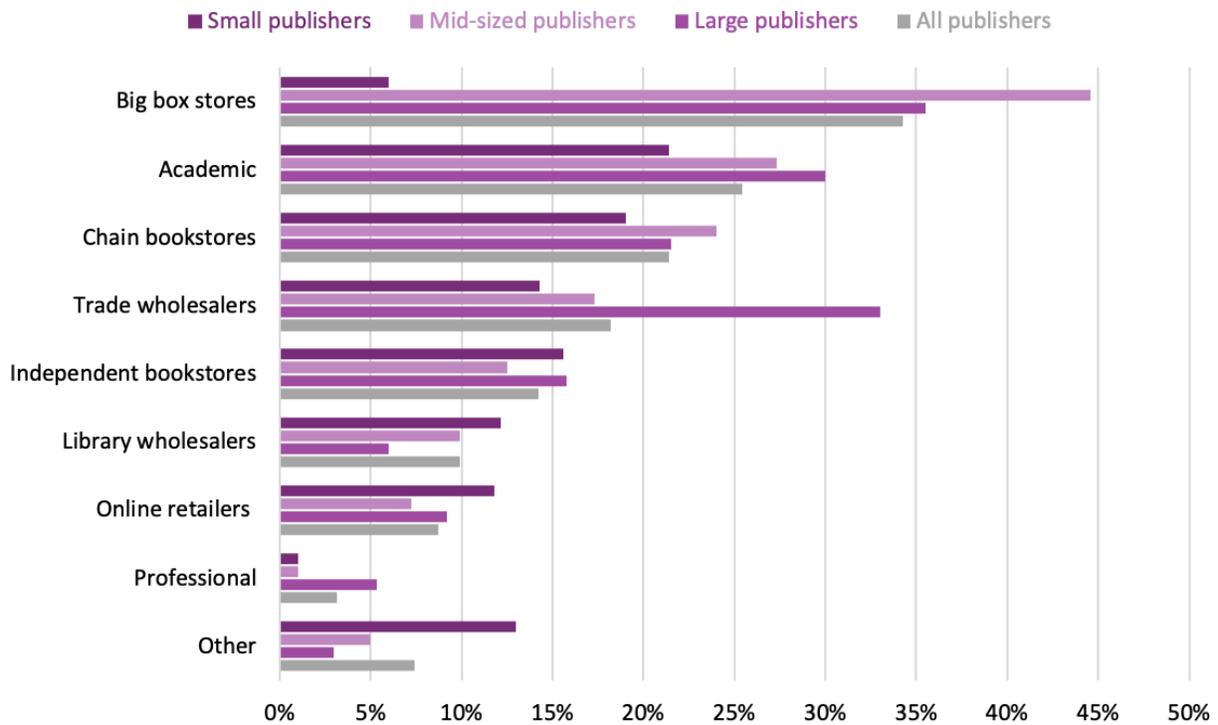
Impressions of the return rate by Canadian publishers, 2021



(n=64)

But, as in 2019, return rates varied depending on the retail channels. The graph below shows the rate of return reported by channel for Canadian publishers in 2021. Big box stores had the highest return rate (34%) and professional or corporate B2B channels had the lowest (3%). Academic channels also had a high return rate at 25% as did chain bookstores (21%).

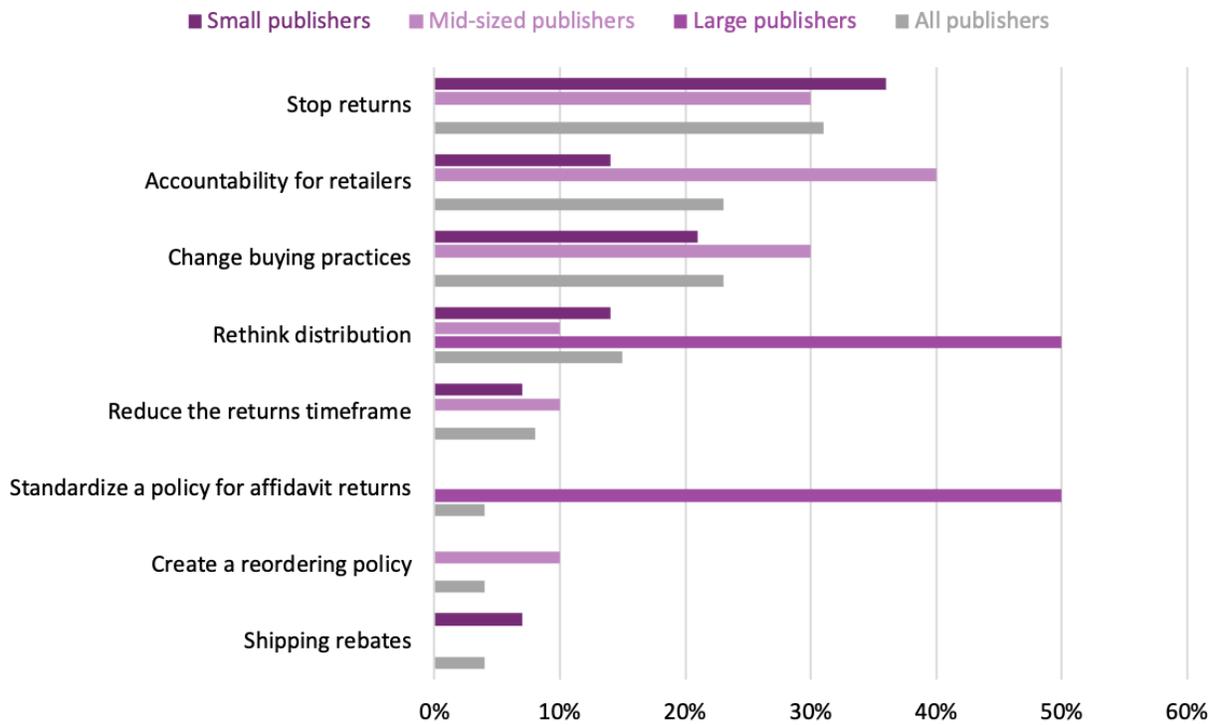
Return rate by channel for Canadian publishers, 2021



(n=36)

In order to standardize or increase coordination for all returns across the supply chain, most publishers recommended stopping returns (31%), increasing accountability for retailers (23%), and changing buying practices (23%). These top three responses were driven by small and mid-sized publishers. Instead, large publishers split their answers between rethinking distribution (50%) and standardizing a policy for affidavit returns (50%), shown in the graph below.

Ideas for standardizing returns by Canadian publishers, 2021



(n=26)

What do you think could be done at your company or industry wide to standardize or increase coordination for all returns across supply chain partners?

- Scrap returns. It's an outdated and extremely wasteful practice. (Small publisher)
- Suggest a policy whereby a book returned cannot be ordered again for a certain period, say 3 to 4 weeks. Places accountability on vendor to examine all possible placements of book — current store demands and future promotion. Would highlight a real commitment to sustainable practices. (Mid-sized publisher)
- Not sure there is an industry wide model. At company level monitor orders to ensure over-buys don't happen. Understand one's market and marketplaces. Sell "deep" rather than "wide". We offer a higher discount for non-returnable to some very, very small niche booksellers. Increase direct to consumer sales. (Small publisher)
- Better trade wholesalers. Reducing the number of new titles we publish, and shifting sales, marketing, and publicity focus to the full active catalogue and inventory. (Large publisher)

Digital books

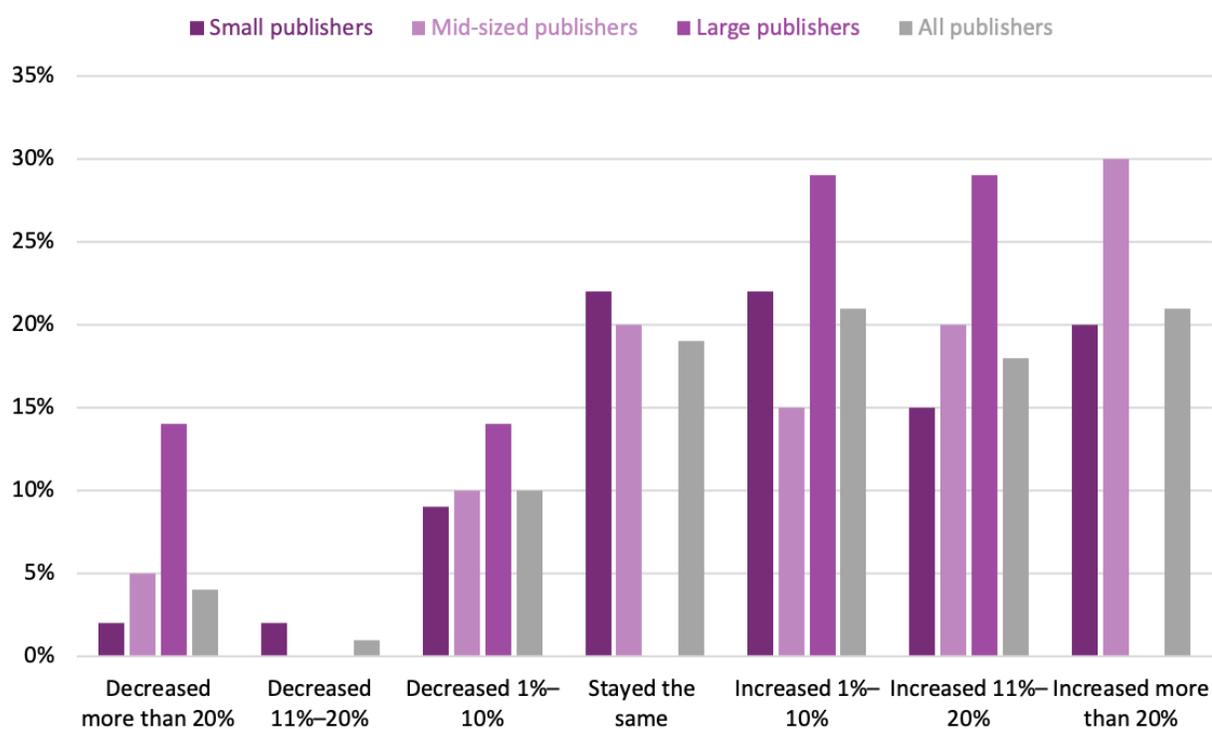
In 2021, revenue from digital books was approximately 40% frontlist and 60% backlist. This is the same as the breakdown of print book sales reported by [BNC SalesData](#), where 40% of the value sold in 2021 were frontlist and 60% were backlist.

Most publishers (59%) saw increases in digital book revenue from 2020 to 2021. The graph below shows the change in digital book revenue for Canadian publishers

in 2021. While small and mid-sized publishers saw the biggest increases, large publishers were the most likely to see decreases.

In the results to our last survey of publishers in 2019, more publishers said their revenue had stayed flat (46%) but no publishers reported that their revenue from digital books increased by more than 20% between 2018 and 2019 — a far cry from the 21% of publishers who saw that level of revenue increase from 2020 to 2021.

Changes in digital book revenue for Canadian publishers, 2021



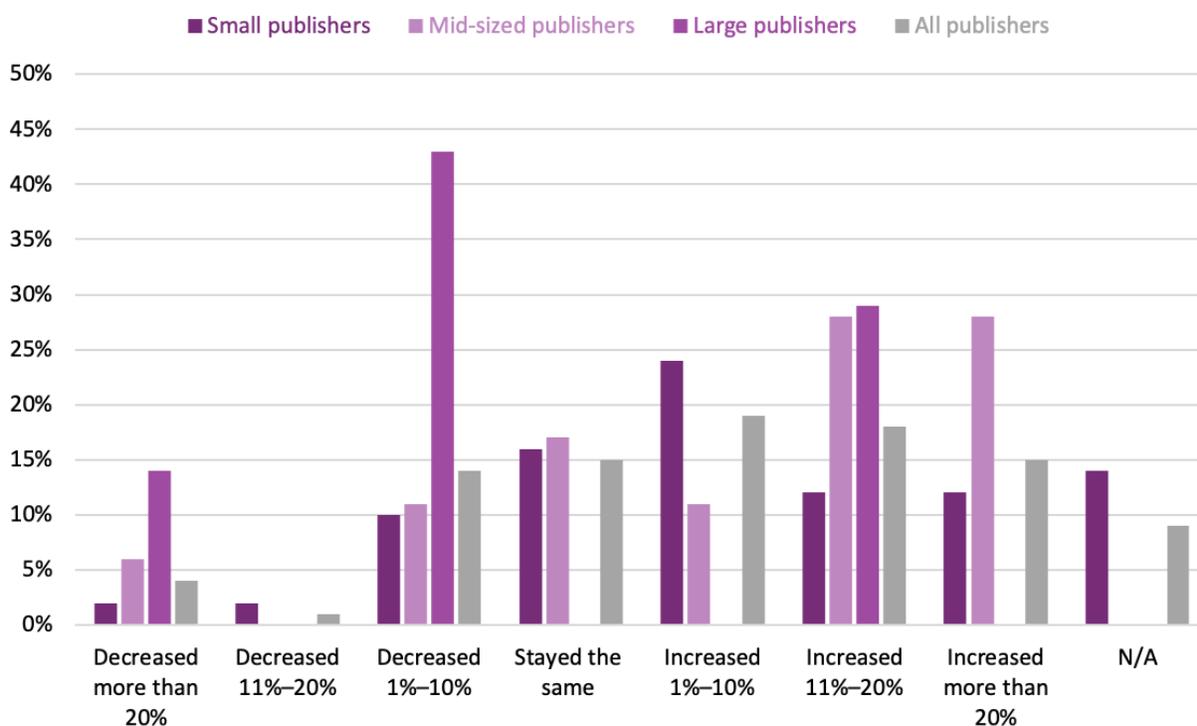
(n=73)

Ebooks

Over half of all publishers saw increases in ebook revenue in 2021 (52%). Shown in the graph below, small and mid-sized publishers saw the biggest increases — 67% of mid-sized publishers and 48% of small publishers reported increases in revenue from ebooks sales in 2021. For 17% of mid-sized publishers and 16% of small

publishers, there was no change in ebook revenue year over year. Significantly, 57% of large publishers reported decreases in revenue from ebook sales in 2021 — 43% saw decreases of 1–10% and 14% saw decreases of more than 20%.

Changes in ebook revenue for Canadian publishers, 2021



(n=74)

In 2021, publishers mostly derived gross revenue from ebooks from retailers (71%), library wholesale (62%), and direct to consumer sales (48%), shown in the table below. About a quarter of publishers reported no revenue from direct to consumer sales in 2021 (26%), a much lower percentage than in 2019 (40%).

Ebook revenue by channel for all Canadian publishers, 2021

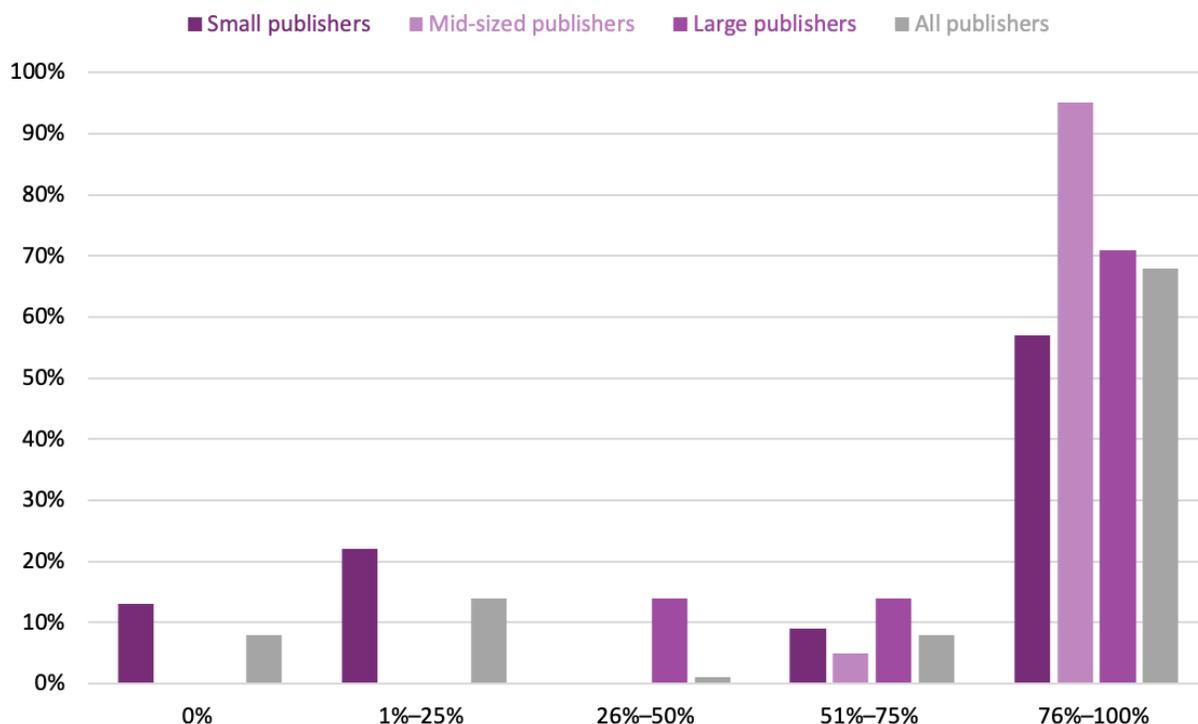
	Retailers					
	Direct to the public	(including subscriptions)	Library wholesale	Academic	Professional	Other
0%	26%	6%	9%	26%	43%	36%
1%–10%	24%	4%	21%	25%	12%	5%
11%–20%	8%	3%	11%	9%	0%	3%
21%–30%	3%	4%	12%	4%	0%	8%
31%–40%	0%	9%	5%	0%	0%	0%
41%–50%	5%	4%	5%	0%	0%	0%
51%–60%	0%	3%	5%	2%	0%	3%
61%–70%	0%	12%	3%	0%	0%	0%
More than 70%	9%	31%	2%	2%	0%	0%
Unsure	12%	13%	17%	14%	18%	18%
N/A	14%	10%	12%	19%	27%	28%

(n=68)

When it comes to the percentage of print books that publishers converted to ebooks in 2021, most publishers offered approximately 76-100% of their print books as ebooks. The graph below shows the conversion rate of print books to

ebooks for Canadian publishers in 2021. Mid-sized publishers were most likely to report having converted 76% to 100% of their print books to ebooks in 2021 (95%).

Print book to ebook conversion by Canadian publishers, 2021



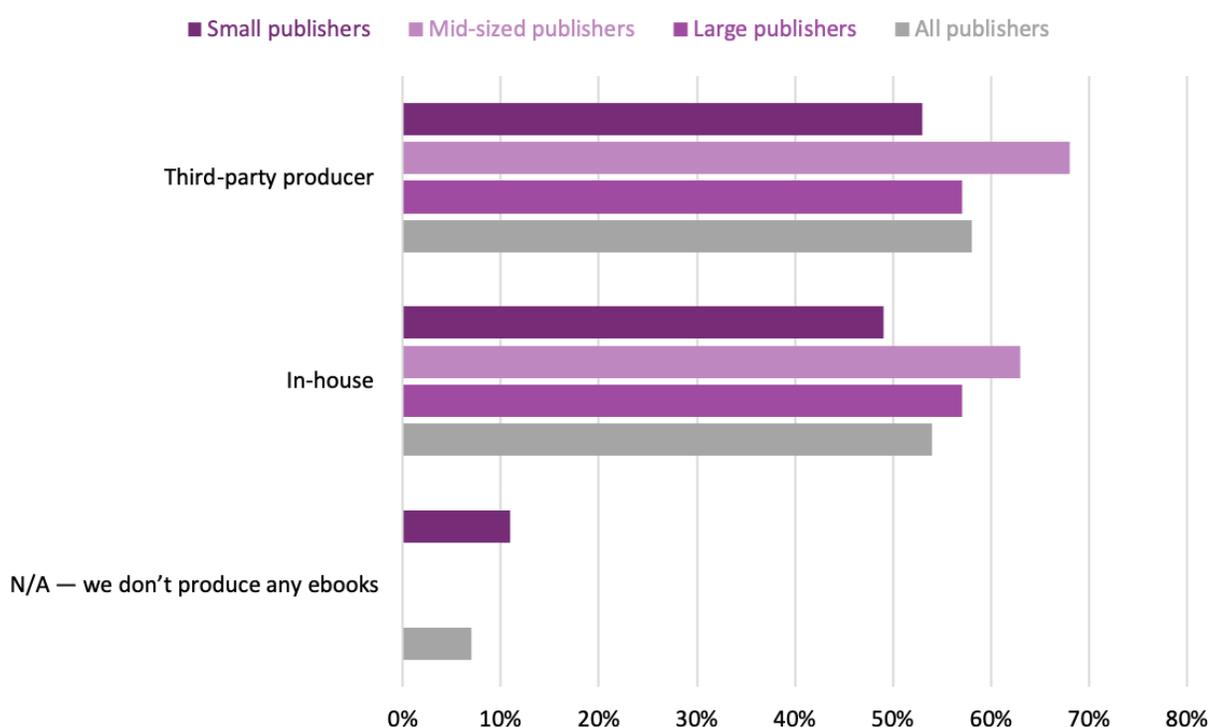
(n=72)

The 2019 edition of this survey had different questions about print to ebook conversion, but the results show a slight rise in the availability of ebooks in 2021. In 2019, slightly more than half of publishers surveyed had converted more than three quarters of their backlist titles to ebook format (55%). Most publishers had more than three quarters of their active adult print titles available as ebooks (55%) in 2019 as well.

While almost all of the publishers surveyed in 2019 were either currently producing or starting to produce ebooks (91%), 93% of publishers were producing ebooks in 2021, a slight increase.

In terms of how these ebooks were produced in 2021, publishers were split between using third-party producers (58%) or in-house departments (54%), shown in the graph below. Large publishers were evenly split — 57% for both in-house and third-party producers. Meanwhile, small publishers were least likely to produce ebooks (11%).

Ebook production by Canadian publishers, 2021

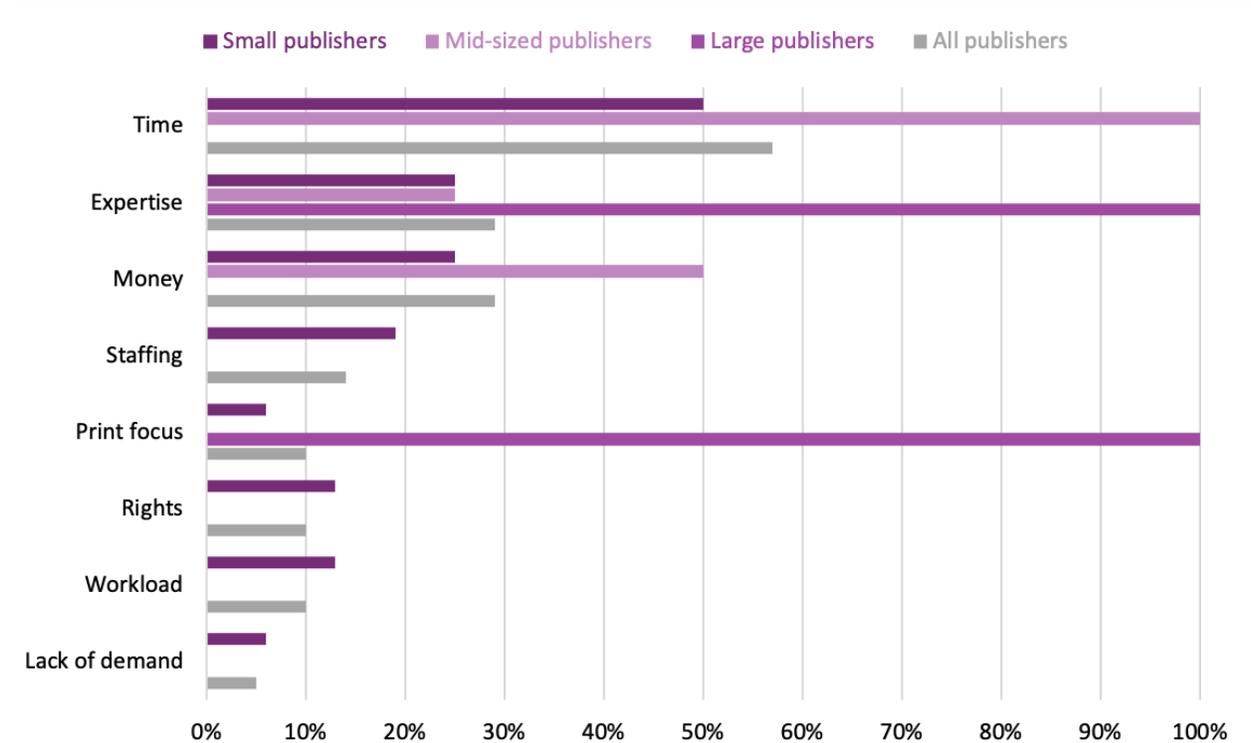


(n=71)

For publishers who either did not produce ebooks or those who produced fewer than they would have liked to, the barriers that kept them from doing so were the factors that limit most new endeavours — time (57%), expertise (29%), and money (29%). The graph below shows all of the barriers mentioned by Canadian publishers in 2021. For large publishers, having a print production focus (100%) and a lack of in-house expertise (100%) were the biggest barriers to ebook production in 2021. Mid-sized publishers all agreed time was a barrier (100%) and half of them cited

money (50%). Small publishers shared a number of additional barriers, but half also cited time (50%).

Barriers to ebook production for Canadian publishers, 2021



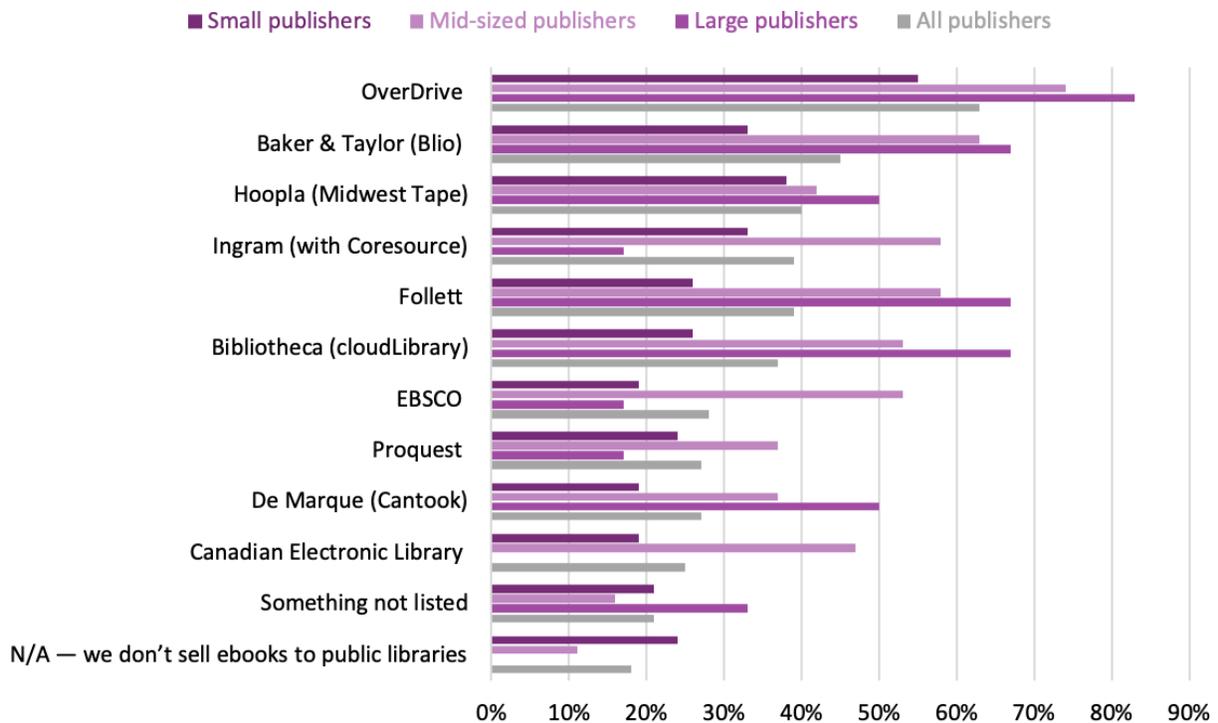
(n=21)

In 2021, what were the barriers preventing your company from producing ebooks (either in-house or outsourcing)?

- Acquiring rights from authors — we have a great workflow in the office, and have outsourced some production as well but don't have enough staff hours to update contracts with authors. (Small publisher)
- Most ebooks are done in house, but when time constraints come into play, some outsourcing is done. (Mid-sized publisher)
- Print-first production processes, lack of technical expertise. (Large publisher)
- Staff time, skills, and money. Despite workshops and tutorials, learning how to create accessible ebooks is challenging and time-consuming. (Small publisher)

In 2021, Canadian publishers used more distribution channels to sell ebooks to libraries than in previous years. The graph below shows the variety of ebook distribution channels used by Canadian publishers in 2021. Among them, the most popular library services or wholesalers were OverDrive (63%), Baker & Taylor (45%), and Hoopla (40%). Usage for each of these services has decreased since 2019, down from 69%, 55%, and 43% respectively. Instead 2021 saw an increase in the use of other services below, with another 21% of publishers in 2021 citing services not listed in the survey, including direct sales (4%), eBOUND (3%), Gardners (3%), and IPG (3%). Another 18% of publishers reported not selling ebooks to public libraries in 2021, higher than 10% in 2019 and 8% in 2017.

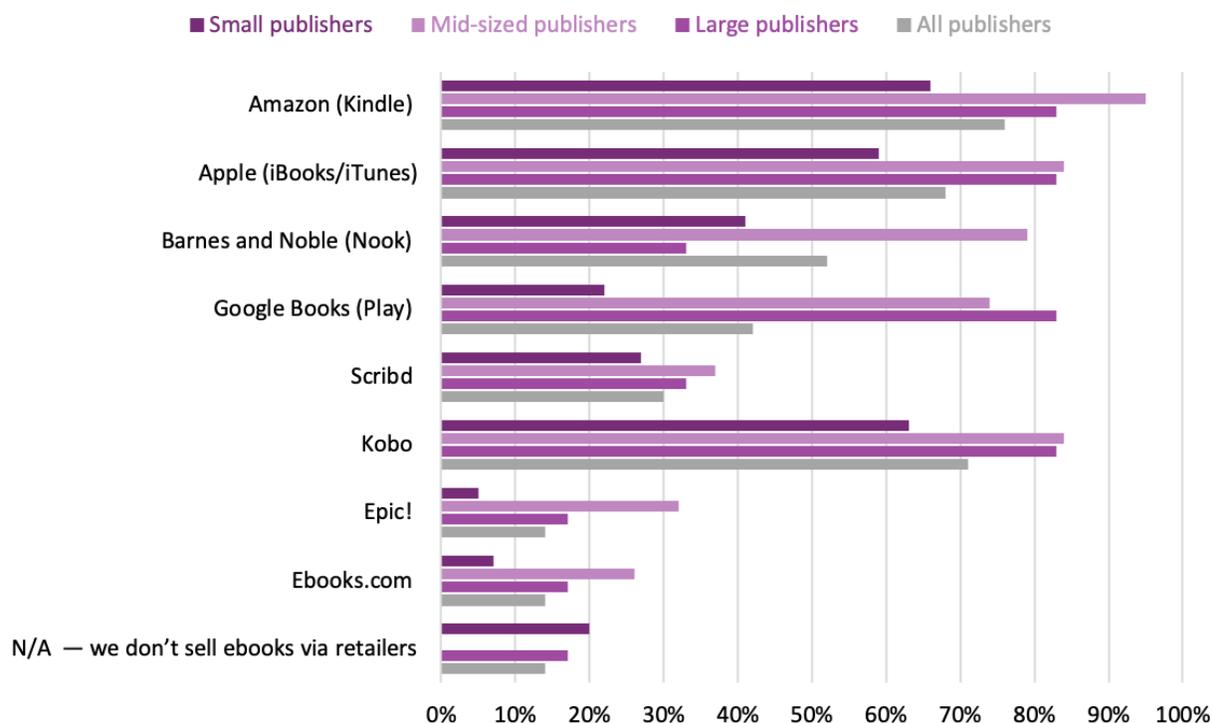
Ebook library services and wholesalers used by Canadian publishers, 2021



(n=67)

For public-facing sales in 2021, as in 2019, the most popular ebook retailers were Amazon (76%), Kobo (71%), and Apple (68%). The graph below shows the remaining top ebook retailers used by Canadian publishers in 2021.

Ebook retailers for Canadian publishers, 2021

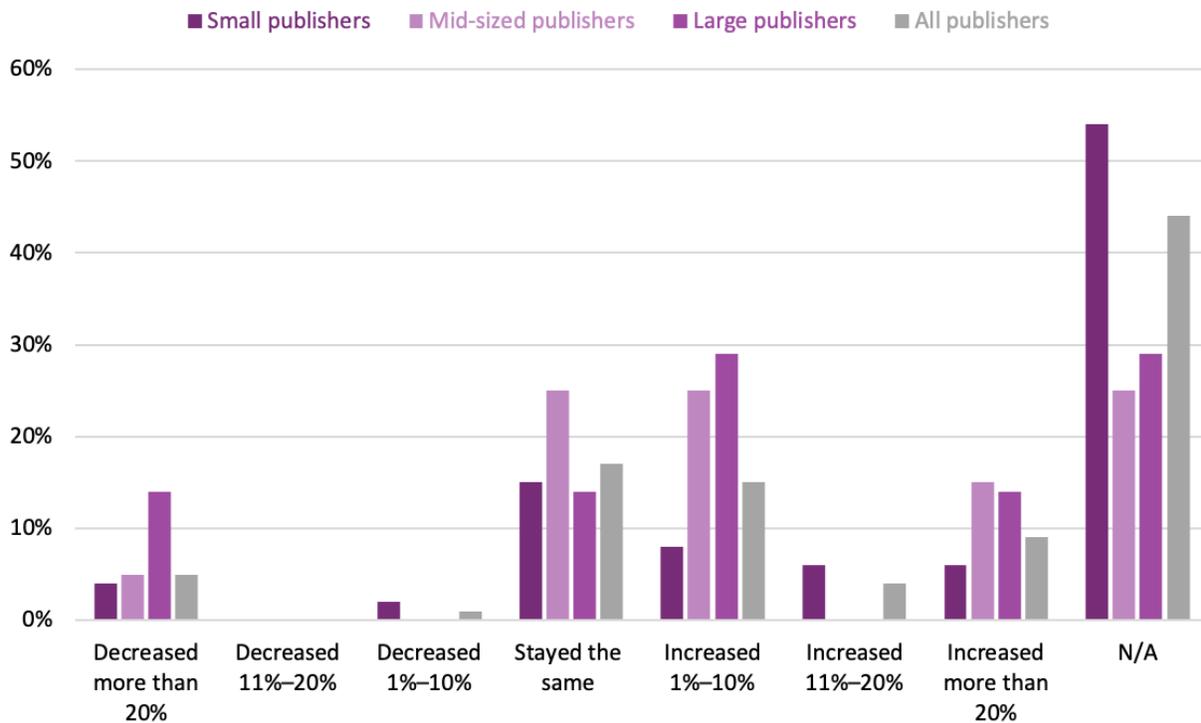


(n=66)

Audiobooks

For 28% of publishers, revenue from audiobook sales increased in 2021 when compared to 2020. This is especially true for large and mid-sized publishers — 43% of large publishers and 40% of mid-sized publishers reported increases in audiobook sales in 2021. By comparison, 20% of small publishers reported increases in revenue for audiobooks. Publishers across all sizes reported that audiobook revenue did not change from 2020 to 2021 — 14% of large publishers, 15% of small publishers, and 25% of mid-sized publishers, shown in the graph below.

Changes in audiobook revenue for Canadian publishers, 2021



(n=75)

In 2021, publishers mostly derived gross revenue from audiobooks from retailers (42%) and library wholesalers (39%). The table below shows all the channels Canadian publishers derived gross audiobook revenue from in 2021. Here, slightly fewer publishers derived 71-100% of their audiobook revenue from retailers in 2021 (18%) than in 2019 (21%).

Audiobook revenue by channel for all Canadian publishers, 2021

	Retailers					
	Direct to the public	(including subscriptions)	Library wholesale	Academic	Professional	Other
0%	25%	6%	9%	26%	34%	23%
1%–10%	13%	3%	13%	12%	5%	6%
11%–20%	0%	0%	4%	0%	0%	0%
21%–30%	2%	1%	3%	0%	0%	0%
31%–40%	0%	4%	1%	0%	0%	0%
41%–50%	0%	6%	7%	0%	0%	0%
51%–60%	0%	4%	7%	2%	0%	0%
61%–70%	0%	4%	0%	0%	0%	2%
More than 70%	2%	18%	1%	0%	0%	0%
Unsure	10%	10%	10%	10%	12%	11%
N/A	48%	42%	42%	50%	48%	58%

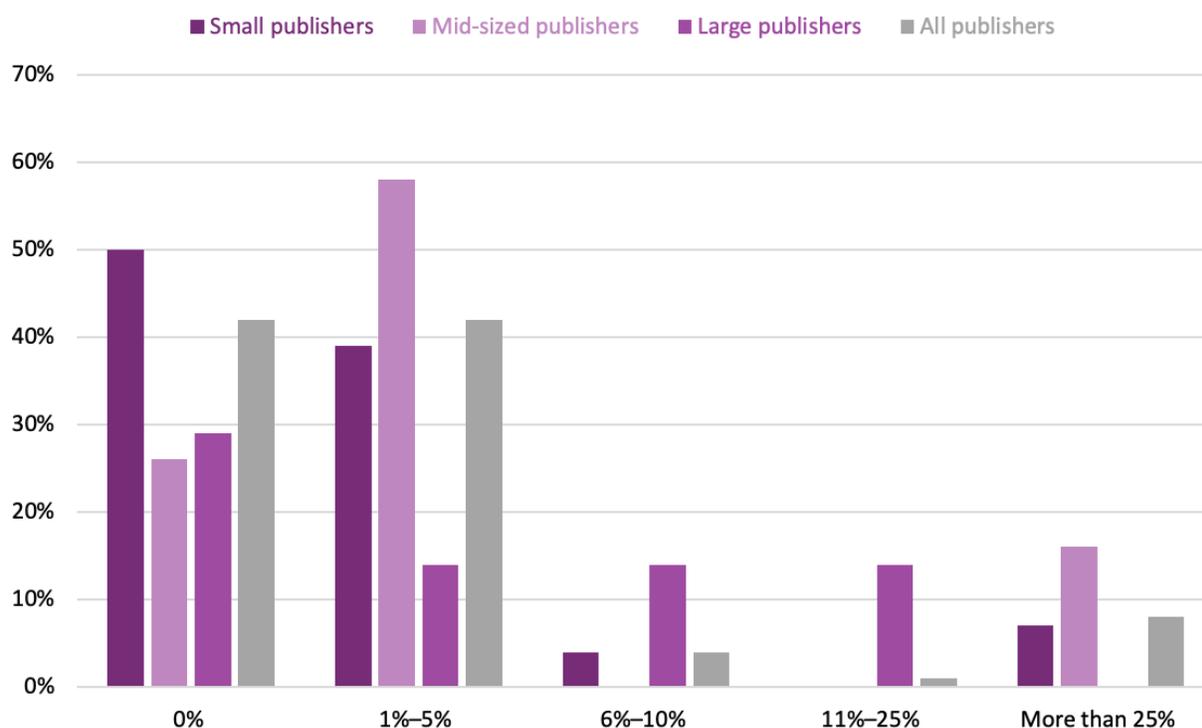
(n=67)

When it comes to making print book offerings available in audiobook format in 2021, far fewer publishers had the high percentages that we found for ebooks.

Instead, most publishers offered approximately 1-5% of their print books as audiobooks, shown in the graph below.

Small publishers were least likely to have audiobook offerings at all — 50% answered that they had 0% of their print books created in audiobook format in 2021. Mid-sized publishers were most likely to have the highest percentage of print books created in audiobook format, with 16% reporting that more than 25% of their titles in 2021 were available as audiobooks.

Print book to audiobook conversion by Canadian publishers, 2021

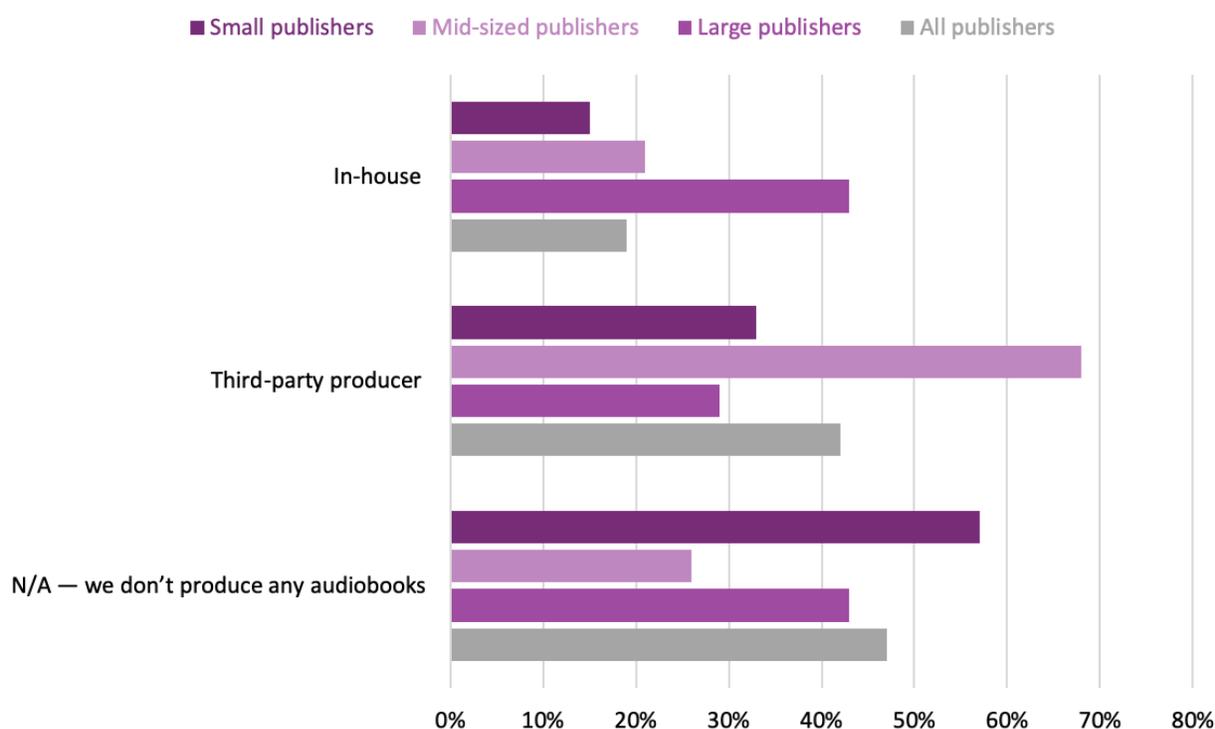


(n=72)

In 2021, over half of Canadian publishers produced audiobooks (53%). Most publishers produced audiobooks with the help of a third-party provider (42%), but 19% had in-house facilities to do so, shown in the graph below. As you might expect, the majority of the in-house production was done by large publishers (43%),

but 21% of mid-sized publishers and 15% of small publishers also did so. Since 2015, the number of publishers producing audiobooks either directly or through a partner has been increasing — from 16% in 2015, to 37% in 2016, and 61% in both 2017 and 2019.

Audiobook production by Canadian publishers, 2021



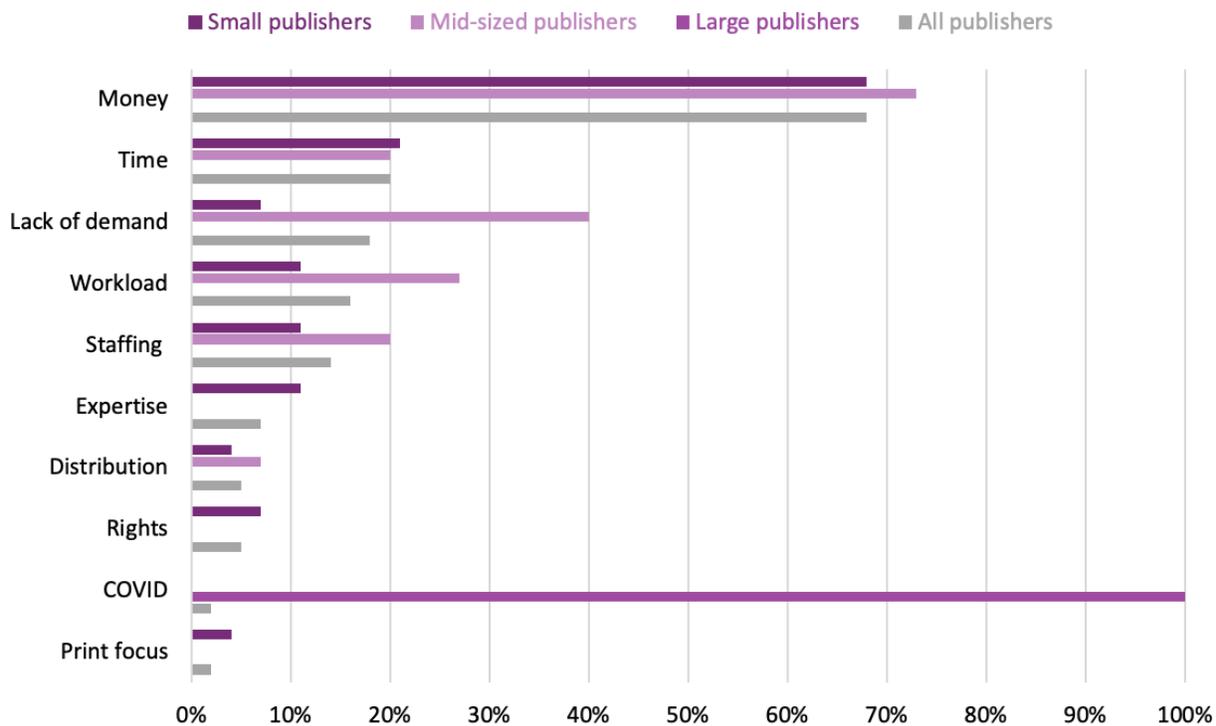
(n=72)

For publishers in 2021, the barriers to producing audiobooks seemed more daunting than for producing ebooks. According to the publishers we surveyed, the top two barriers to audiobook production were the same as for ebook production — money (68%) and time (20%). The third biggest barrier was a lack of demand (18%), shown in the graph below.

Interestingly, the only barrier to audiobook production identified by large publishers were COVID-19 restrictions (100%). Mid-sized publishers were most

likely to cite a lack of demand for audiobooks as a barrier (40%) and, just as with ebooks, small publishers were the most pressed for time (21%).

Barriers to audiobook production for Canadian publishers, 2021



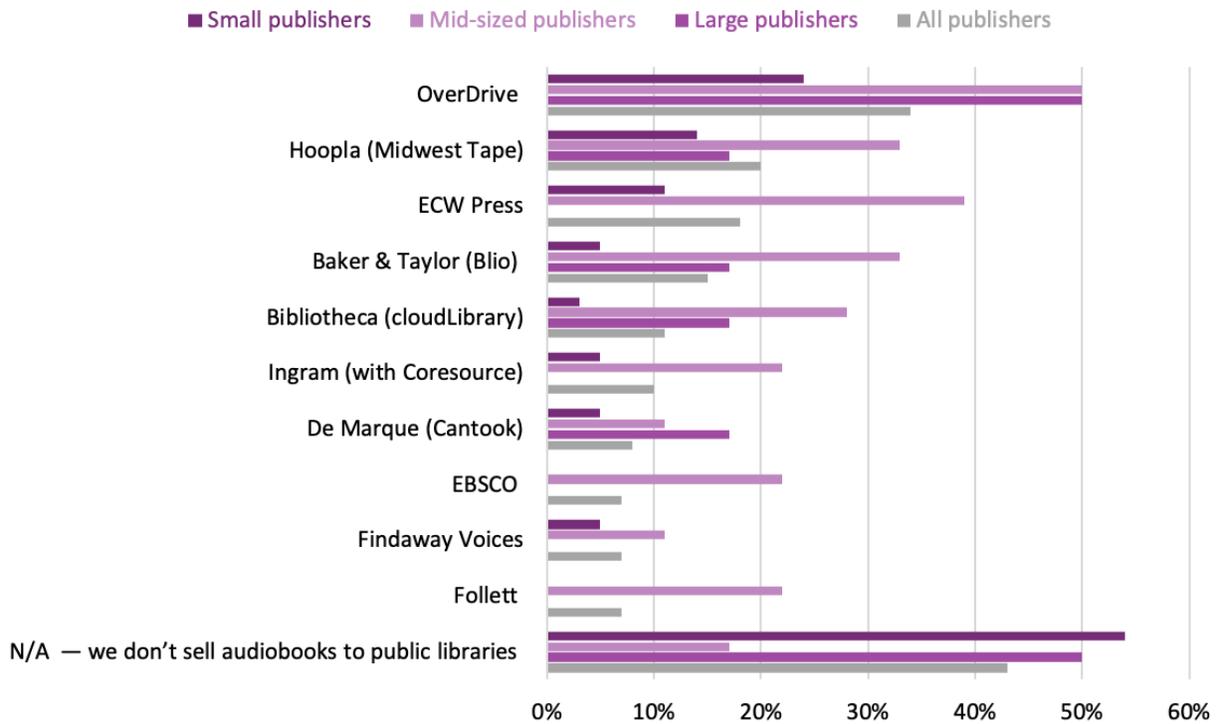
(n=44)

In 2021, what barriers prevented your company from producing audiobooks (either in-house or outsourcing)?

- We did two titles to start. The barrier is the large amount of work for staff who have limited hours, and the cost to produce the audiobooks, in comparison with what they make. (Small publisher)
- Costs for titles not eligible for funding i.e., US authored titles. (Mid-sized publisher)
- Cost of producing graphic novels in audiobook format is a barrier to producing more of our list in audiobook format. (Mid-sized publisher)
- Cost and no true data supporting the creation or demand for Canadian non-fiction. Lots of anecdotal feedback from librarians that they want Canadian content, but the data does not support this. (Mid-sized publisher)

In 2021, 57% of publishers sold audiobooks to public libraries through library services and wholesalers, especially OverDrive (34%), Hoopla (20%), and ECW Press (18%). It is worth noting that ECW Press had a large increase in share from 2019 where it did not appear in our respondent's list, shown in the graph below.

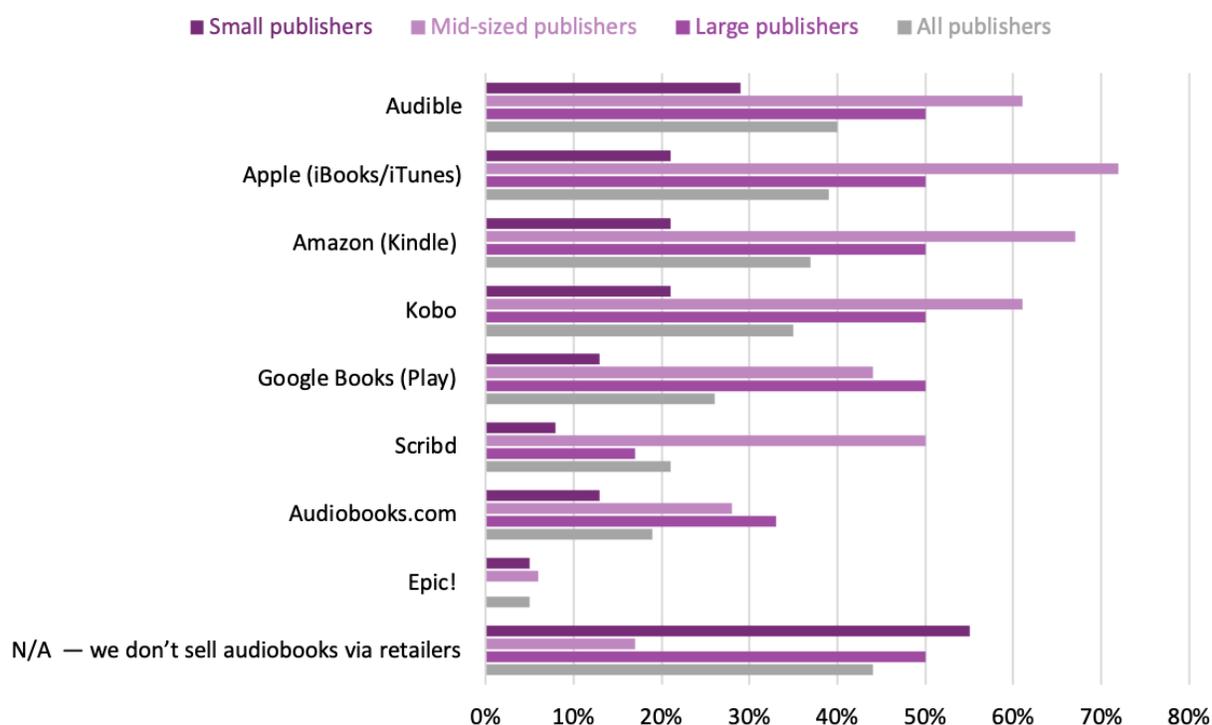
Audiobook library services and wholesalers used by Canadian publishers, 2021



(n=61)

In 2021, as in 2019, the most popular audiobook retailers for public-facing sales were Audible (40%), Apple (39%), and Amazon (37%).

Audiobook retailers for Canadian publishers, 2021



(n=62)

Accessibility

When it comes to accessible formats offered by publishers in 2021, just over half provided 76% to 100% of their frontlist titles as accessible EPUBs (52%) and another 25% provided accessible PDFs. Mid-sized publishers were the most likely to do so — 58% provided 100% of their 2021 frontlist titles as EPUBs and 33% provided PDFs. For backlist titles, fewer publishers offered 76% to 100% of their backlist as accessible EPUBs and PDFs, at 23% and 14% respectively.

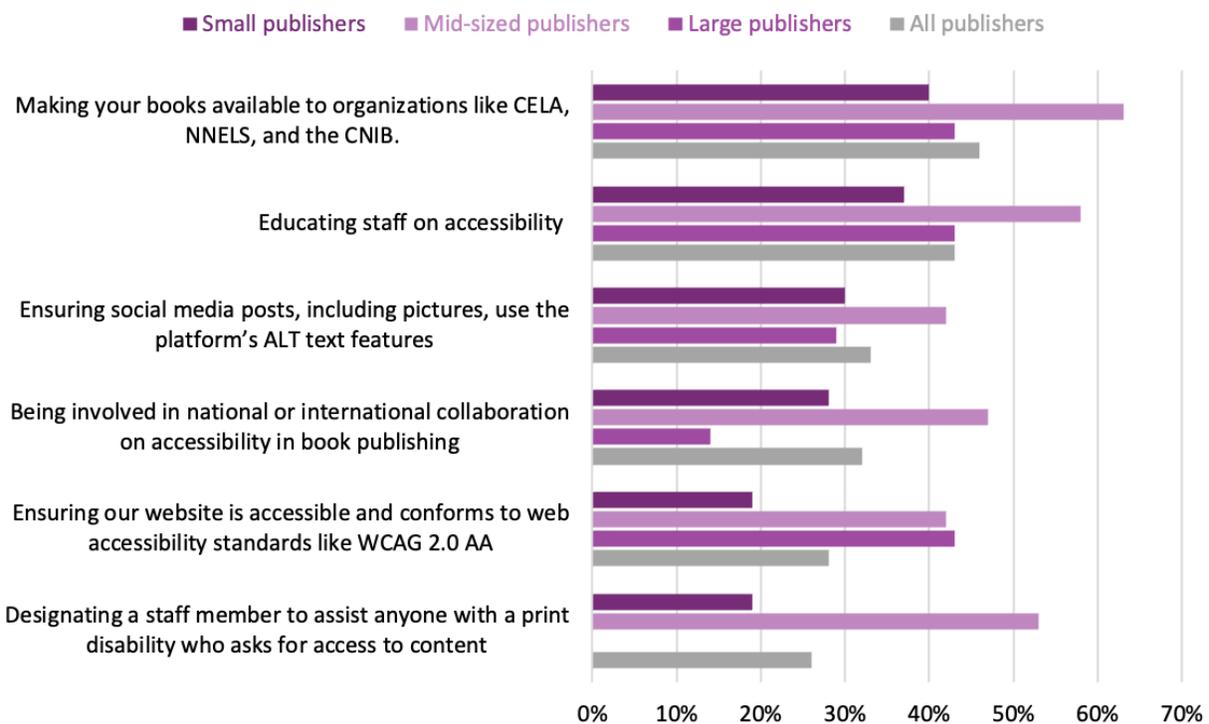
In 2021, publishers released on average 11 digital books that were not available in print form. This average was highest for small publishers (15) and lowest for large publishers (5).

Publishers also took other steps to ensure that their offerings were accessible, shown in the graph below. These include making their books available to

organizations like CELA, NNELS, and the CNIB (46%); educating staff on accessibility (43%); and including alt text on social media posts (33%).

Many mid-sized publishers (53%) also designated a staff member to assist anyone with a print disability who asks for content and were involved in national or international collaboration on accessibility (47%).

Other ways Canadian publishers made content accessible, 2021



(n=69)

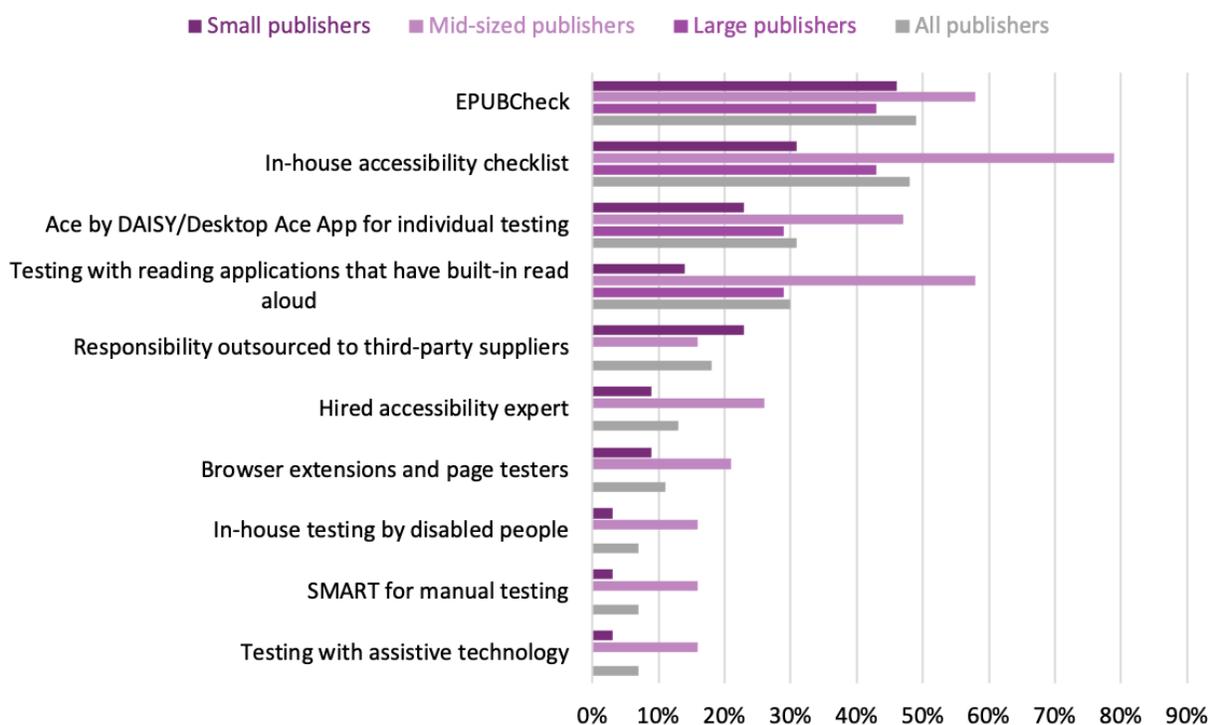
After books were produced, what testing did publishers do as part of their workflow?

In 2021, the most popular accessibility software or testing tools used by publishers were EPUBCheck (49%), an in-house accessibility checklist (48%), and Ace by DAISY (31%), shown in the graph below. The popularity of accessibility checklists more

than doubled from the 20% in 2019 who used an accessibility checklist or accessibility expert.

Testing with reading applications that have built-in read aloud is popular for both mid-sized (58%) and large publishers (29%). Though no publishers hired people with disabilities to test their ebooks, 7% of publishers did have in-house testing by people with disabilities — 16% of mid-sized and 3% of small publishers.

Accessibility software and testing tools used by Canadian publishers, 2021



(n=64)

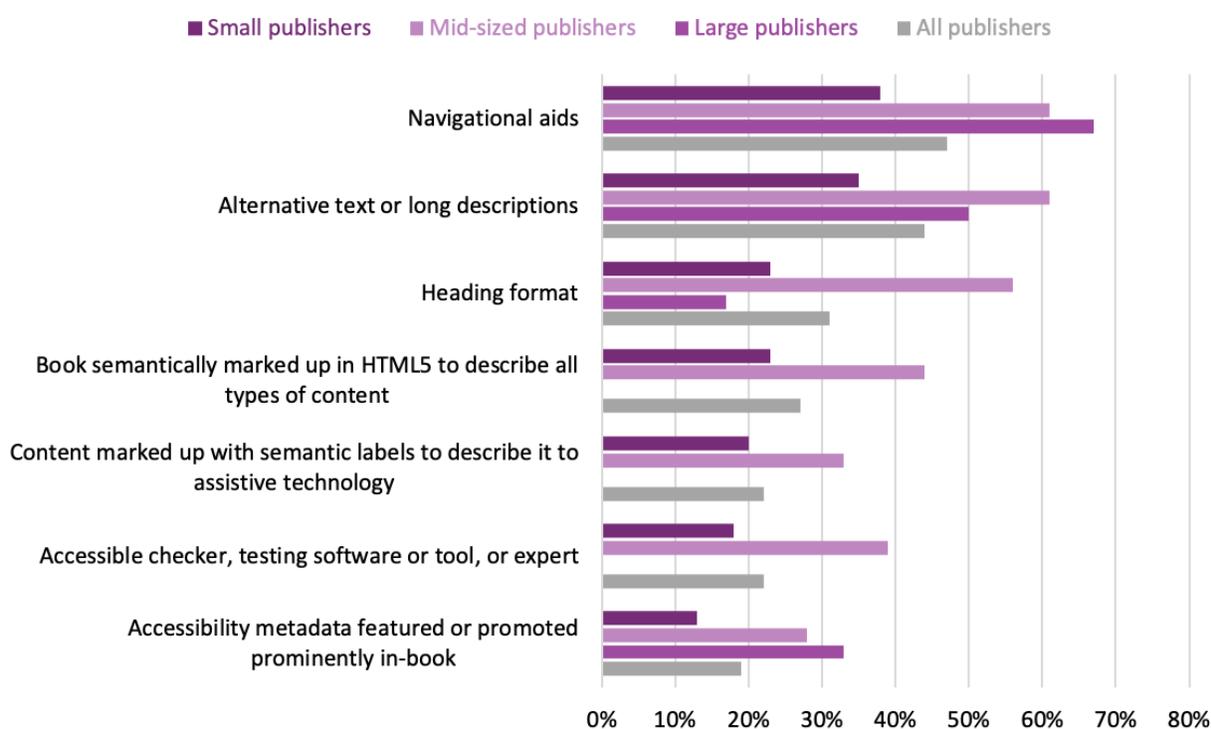
Ebook accessibility

The availability of born accessible ebooks continued to increase in 2021. In 2021, 95% of the publishers who produced ebooks used at least one accessibility feature or process, compared to 87% in 2019.

The most popular accessibility features publishers included in their ebooks in 2021 were navigational aids (47%), alt text (44%), and heading formats (31%), shown in the graph below. In the 2019 edition of this survey, the second most popular accessibility feature was semantic tags, with 33% of publishers using them. In this 2021 edition, semantic labels and semantic markup were divided into two separate categories. Combined, just under half (49%) of publishers used those features.

Accessibility metadata also showed large growth in 2021 as compared with 2019. In 2021, 35% of publishers either featured or promoted accessibility metadata prominently in their ONIX or in their book, up from 28% of publishers in 2019.

Ebook accessibility features included by Canadian publishers, 2021



(n=64)

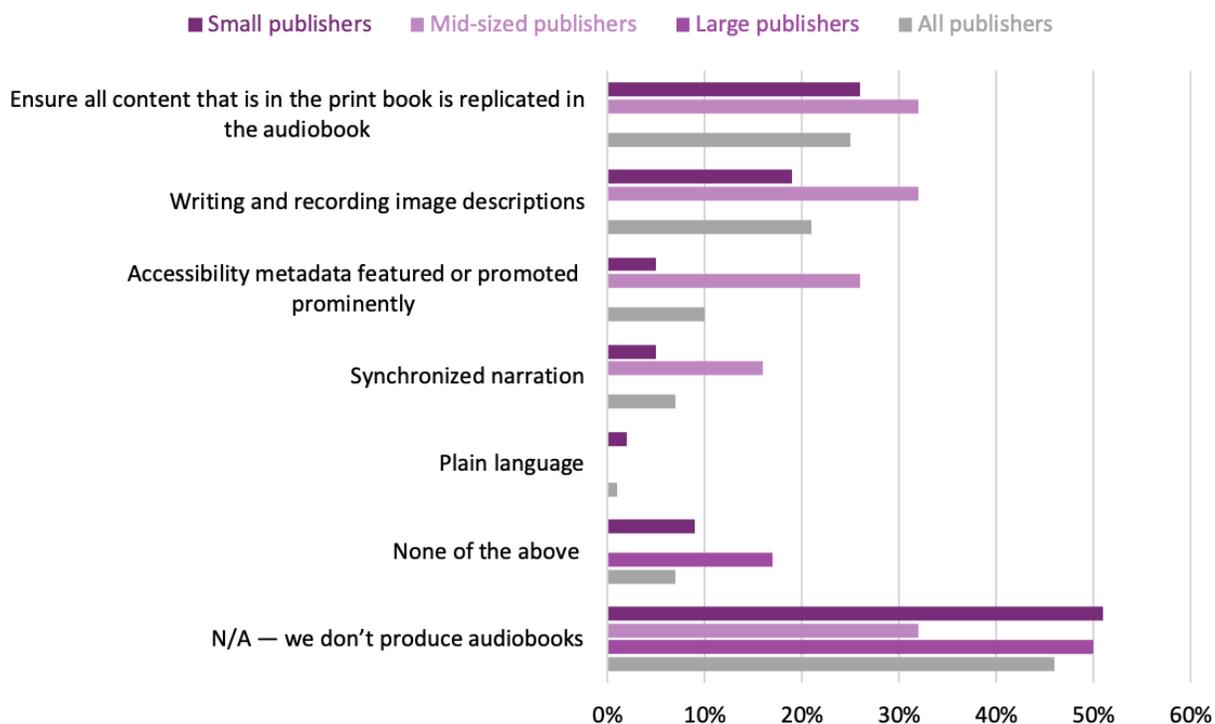
Most publishers did not have their digital production workflow certified as born accessible by a third party in 2021. Only 15% of publishers did so — 12% of small

publishers, 26% of mid-sized publishers, and 0% of large publishers. A handful of small and mid-sized publishers were in the process of getting third party certification (9%).

Audiobook accessibility

In 2021, the most popular accessibility features publishers included in their audiobooks were ensuring all replication of all content from the print book (25%), writing and recording image descriptions (21%), and using accessibility metadata (10%). Though this was most true for small and mid-sized publishers, as large publishers were mostly likely to use none of the features listed in the graph below (17%).

Audiobook accessibility features included by Canadian publishers, 2021

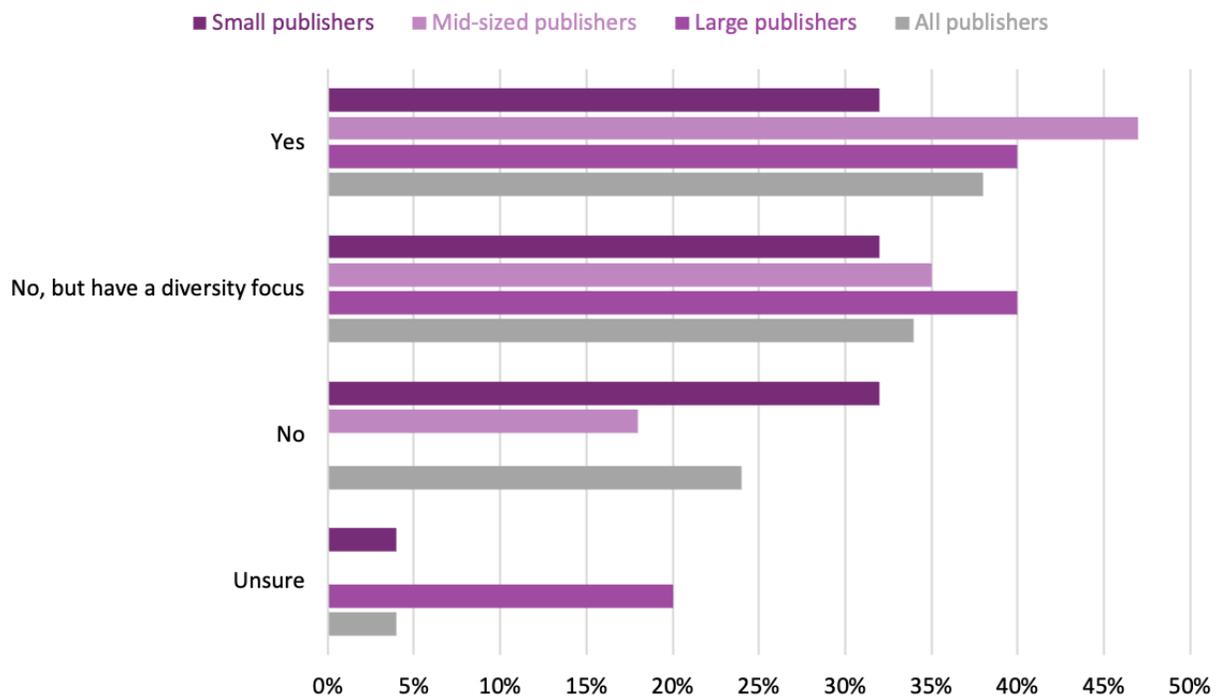


(n=68)

Diversity

When it comes to diversity in publishing, there are a range of opinions on the matter. Of the publishers that responded to the survey, 38% had diversity targets in 2021, while 26% did not and 34% did not have specific targets, but do have a diversity focus as a company, shown in the graph below.

Diversity targets set by Canadian publishers, 2021



(n=50)

*Does your company have targets for diversity in your publishing program?
Which, if any, of these targets were set in 2021?*

Yes

- Diversity targets exist for hiring and authorship. A target for a percentage of authorship who belong to a non-dominant identity was set in 2021. (Large publisher)
- We aim for a minimum of 20-30% of our list being from diverse writers, but try for more. (Small publisher)
- We have taken steps to increase diversity in our list, including hiring an acquisitions editor to focus on diverse representation. (Mid-sized publisher)

No

- Not a specified target beyond more. (Mid-sized publisher)
- We have always welcomed diverse voices but they haven't always submitted. And the ones that have submitted were accepted for their talents not their identity group. (Small publisher)

No, but have a diversity focus

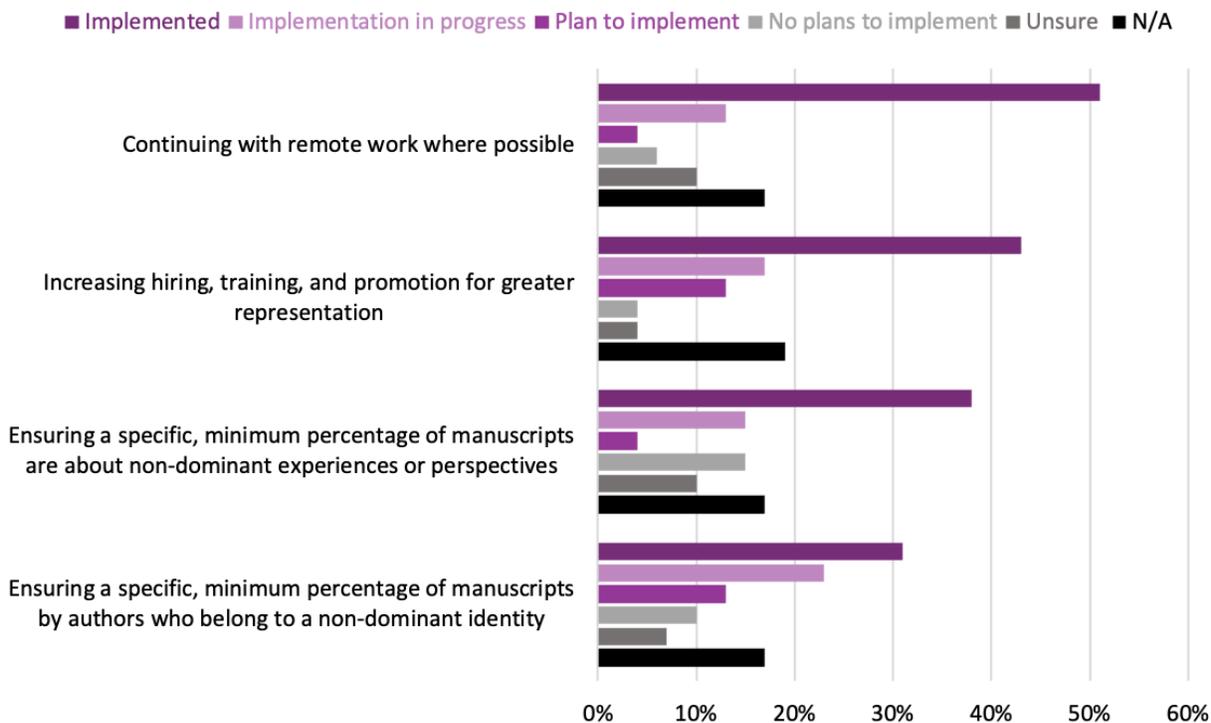
- We don't quantify or set targets around representation. We have done and continue to acquire diverse content and stories to reflect the experiences and demand of our readers. Our focus has been on qualitative changes and learning to improve how well we publish and position BIPOC authors and content that speaks to the experiences of underrepresented identities. (Large publisher)
- We don't need to do this, and certainly have made no changes. We've been a leading publisher of BIPOC voices for over 25 years, and continue to publish Indigenous writers especially. (Small publisher)
- We are a BIPOC-led press with diversity built into our various processes, including hiring. (Mid-sized publisher)

The graph below shows the diversity or representation changes that publishers made in 2021. Many continued with remote working where possible to increase the geographical pool of diverse candidates/workers and lower financial barriers to entry (51%) or were in the process of implementing that change (13%). Small publishers were most likely to have implemented remote working (55%).

Just under half had increased hiring, training, and promotion for greater representation of diverse perspectives and people, across all levels and departments (43%) and a further 17% were in the process of achieving this objective. Large publishers were most likely to have implemented an increased representation in their hiring and promotion practices (57%).

Almost a third of publishers had already implemented acquiring a minimum percentage of manuscripts about non-dominant experiences or perspectives (38%) or that were written by authors who belong to a non-dominant identity (31%).

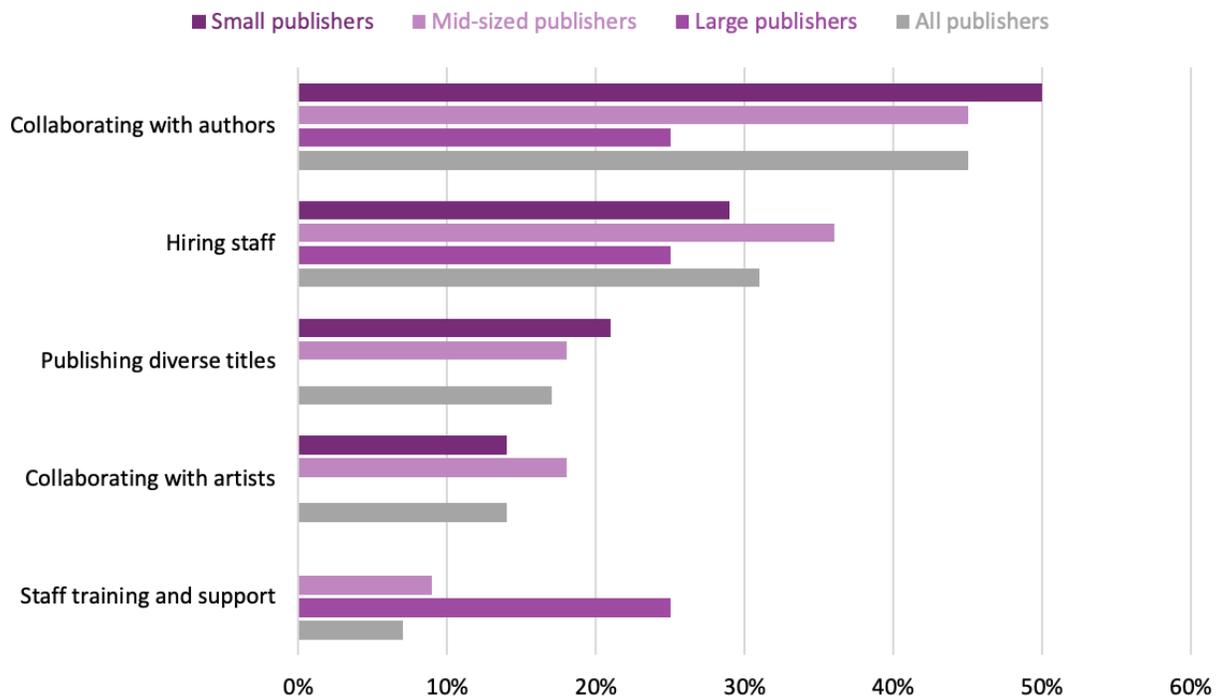
Diversity or representation changes made by all Canadian publishers, 2021



(n=72)

Of the diversity targets set or reached in 2021, most publishers are excited about collaborating with authors (45%), hiring staff (31%), and publishing diverse titles (17%), shown in the graph below.

Excitement for diversity targets set or reached by Canadian publishers, 2021



(n=29)

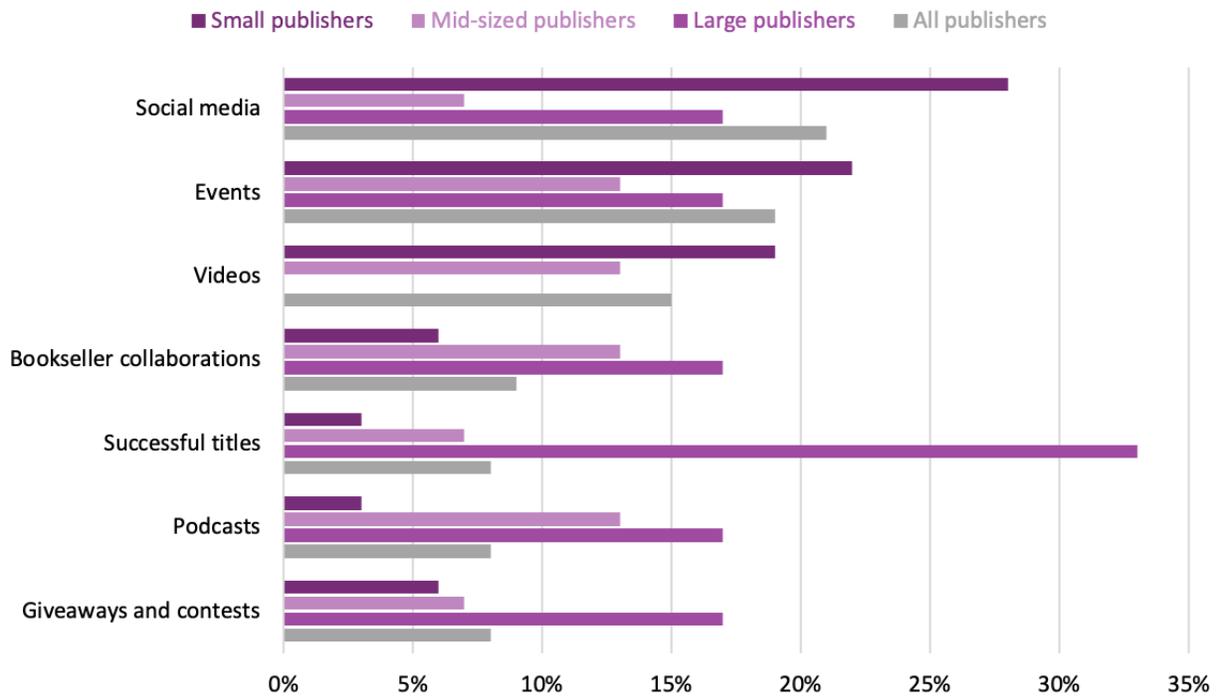
Which diversity target created or met in 2021 are you most excited about?

- It's not a target, but most of our current authors are Indigenous. All of our forthcoming poetry is from Indigenous authors. (Small publisher)
- Working with cover artists from the heritage of the characters we were aiming to portray. (Mid-sized publisher)
- We do not have hiring targets but based on self-identification processes we are pleased with the self-reported diversity of hiring. (Large publisher)
- Really excited about all of these. Hiring and investing in a more diverse range of acquisition editors is going to be what transforms our company. (Mid-sized publisher)
- We look forward to publishing more Indigenous and Latinx perspectives. (Small publisher)
- Excited about making more concrete diversity targets. We currently try to ensure things like a diverse authorship and staff but it would be way more useful to set in place actual goals. (Small publisher)

Marketing

Publishers' most successful marketing strategies in 2021 were related to social media (21%), events (19%), and videos (15%). Many mid-sized publishers saw success with podcasts (13%) and large publishers also saw success with big name titles and awards (33%), shown in the graph below.

Successful marketing strategies for Canadian publishers, 2021



(n=53)

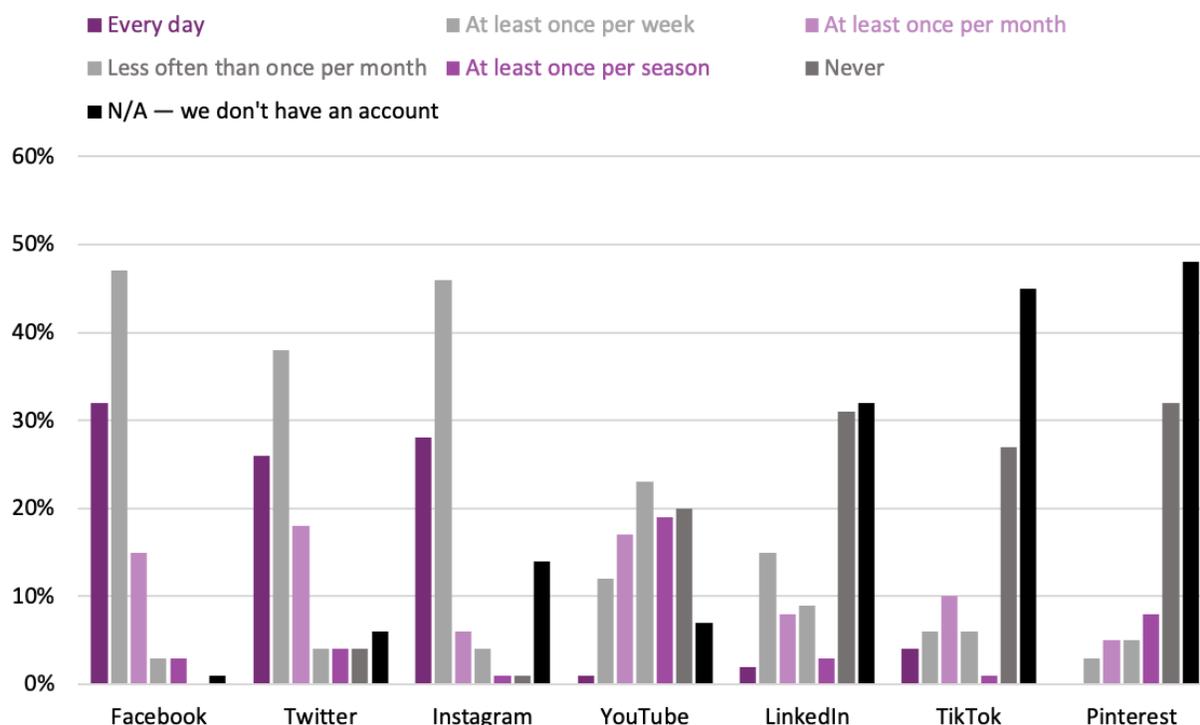
What do you consider your company's most successful or innovative marketing strategy, tactic, or campaign from 2021?

- Book trailers and advertising on social media via Facebook and Instagram. Our partnership with Bookstagrammers was quite successful. (Small publisher)
- Pivoting to virtual events. We did a virtual launch for almost every single book last year, and developed an integrated social media strategy alongside those virtual events. (Small publisher)
- Weekly book giveaways to drive social media traffic. (Mid-sized publisher)
- Using podcasts to showcase new products and authors. (Large publisher)
- A targeted press release mailing campaign for a book set in Nunavut. Press releases were sent to schools and educators in Nunavut who made quite a number of individual and institutional orders after receiving word of the book. (Small publisher)
- We did a "cover reveal" campaign that launched advance sales on our website. We saw a dramatic increase in advance sales, and the authors were excited to share this first look at their books. (Small publisher)

Social media remains popular, with most publishers having accounts and being active on Facebook (99%), Twitter (90%), and Instagram (85%), shown in the graph below. The least popular social media platforms for publishers in 2021 were Snapchat (3%), Tumblr (7%), and Reddit (11%). This is true across all publisher sizes.

For publishers on Facebook, 47% used them at least once per week and 32% used them every day. Instagram use was at 46% at least once per week and 28% every day and for Twitter, 38% used their account at least once per week and 26% did so every day.

Social media platforms used by all Canadian publishers, 2021



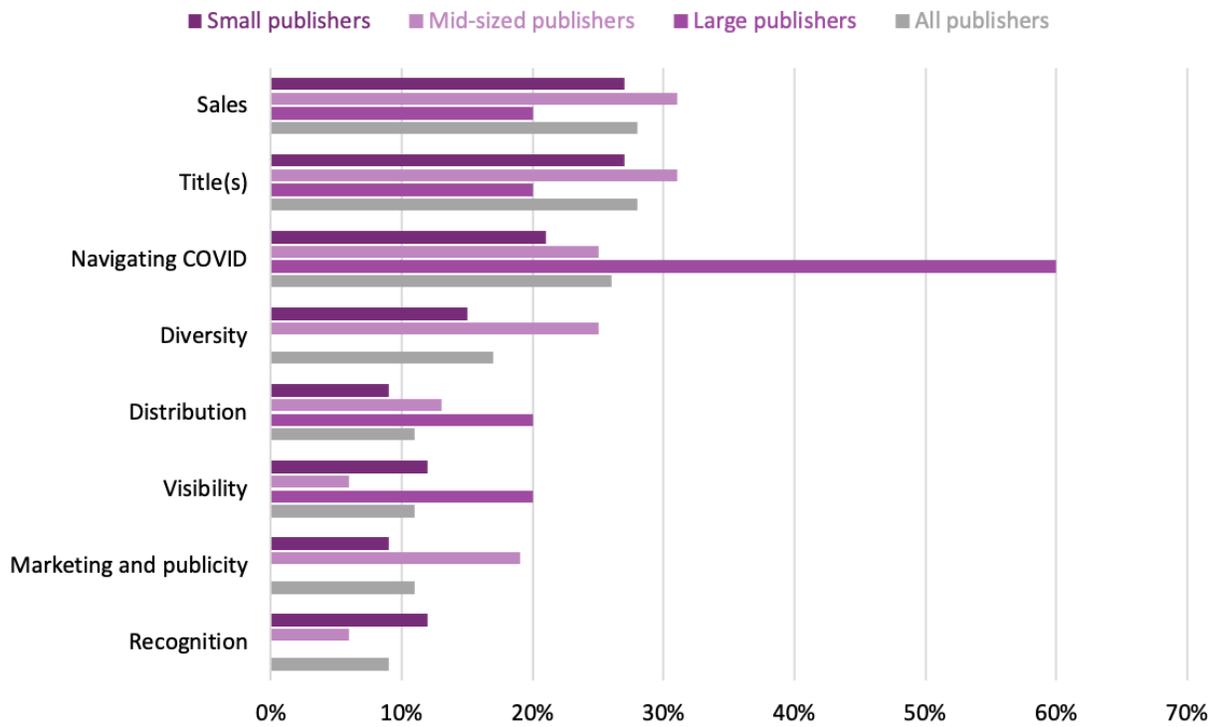
(n=73)

Industry perceptions and reflection

How do publishers perceive the industry and their own contributions in 2021?

In 2021, publishers were most proud of their sales (28%), titles (28%), and navigating COVID-19 (26%). The graph below shows the top achievements by Canadian publishers in 2021. Large publishers were most proud of how they navigated the pandemic shift at 60%; mid-sized publishers were particularly proud of their diversity (25%) and their marketing and publicity (19%); small publishers also noted their diversity (15%) as well as their profile in the industry (12%) and recognition in terms of awards and reviews (12%).

Achievements that Canadian publishers are most proud of, 2021



(n=54)

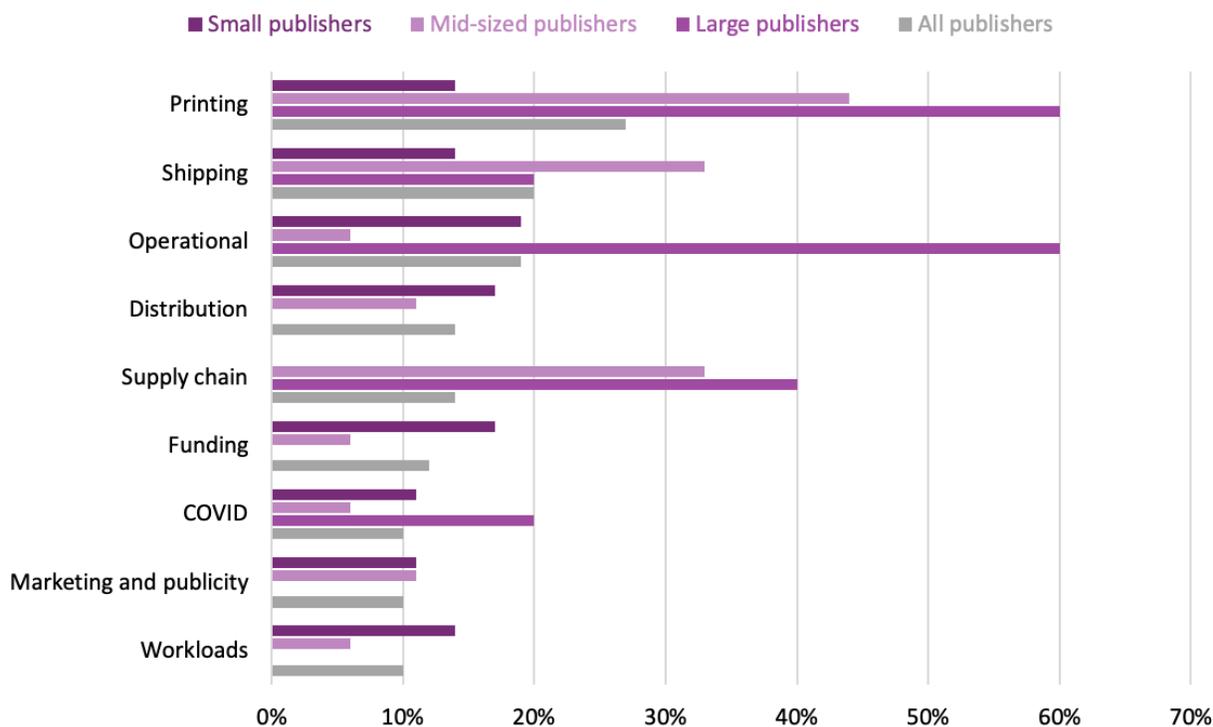
What worked well for your company in 2021? What are you proud of?

- Publishing three well-received trade books resulted in more sales which helped offset the huge increases in print costs. As a publisher who doesn't qualify for federal funding and operates in a province with no provincial funding, I'm proud that we are still in business. (Small publisher)
- 2020 was an outlier year for us all. The sales dipped in early 2020 and then skyrocketed on the back of a bestseller book. Simultaneously, we expanded our ebook distribution to meet our readers halfway. In 2021, we're happy to report that we managed to carry the momentum built in 2020 and not only retained our market share, but increased our sales by 10%. (Mid-sized publisher)
- Increasing direct sales to consumers resulted in better margins and lower returns. (Large publisher)
- Very strong frontlist titles. Great sales. More audiobooks than ever. A significantly more diverse title list for 2022 and beyond. A strong cadre of acquisition editors in development. Smarter and more successful marketing efforts. Better cover designs. (Mid-sized publisher)
- Successfully navigating the pandemic with no employee loss. (Small publisher)
- We continue to work remotely and every title has been on time. (Large publisher)
- Connecting with readers in the hybrid environment. Celebrating beloved stories and creators. Working towards greater accessibility for our titles. Seeing the company and the mentorship program grow. (Mid-sized publisher)
- Publishing all Canadian books, with Canadian artists' work on the covers. (Small publisher)

On the flipside, the biggest pain points for publishers in 2021 were printing (27%), shipping (20%), and operational challenges (19%), shown in the graph below.

For large publishers, the pain points were concentration around printing (60%) operations (60%), supply chain (40%), shipping (20%), and COVID-19 (20%). The pain points for small and mid-sized publishers spanned a greater breadth. Small publishers flagged distribution (17%), funding (17%), and workloads (14%) as additional concerns. Mid-sized publishers were frustrated with the supply chain (33%), distribution (11%) and marketing and publicity reach (11%).

Challenges for Canadian publishers, 2021



(n=59)

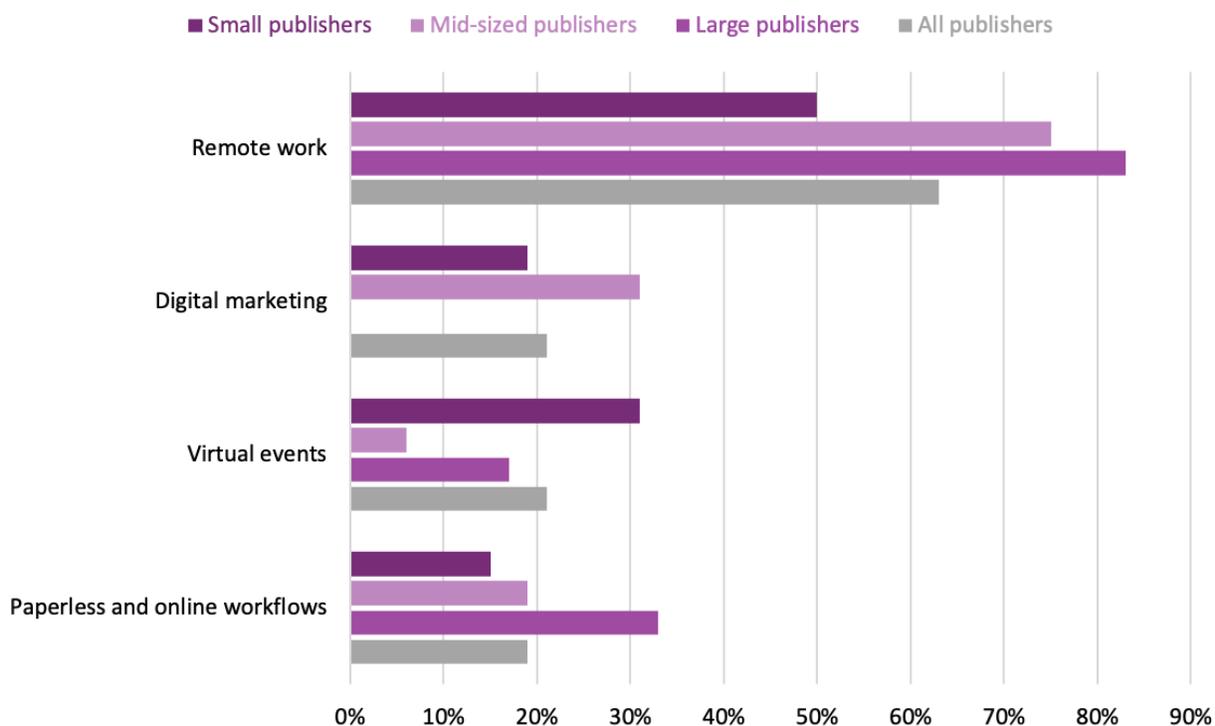
What was your company's biggest challenge or pain point in 2021? Which barriers or limitations does your company need support to remove, or would like to see removed?

- While our revenue hit record levels, there was a corresponding record burnout amongst employees that was untenable, despite having strong benefits for wellness and mental health. We worked to increase resources quickly. But, our focus on being more equitable in our hiring practices meant opening up to candidates who didn't have the typical experience or qualifications and required more time spent onboarding and training. (Large publisher)
- Supply chain! If readers won't support the price increases that are needed to match the increased costs of printing and shipping, then we're going to see a diminished industry. Even then, book warehouses need to tackle labour issues. Inflation will affect other areas in 2022. (Mid-sized publisher)
- Distribution and sales. I need support with a larger distributor in Canada so I can reach more than my local independent bookstores. (Small publisher)
- Allow small publishers to apply for Canada Book Fund grants. We have to use 100% our own money for FOUR titles before they will even look at us. (Small publisher)
- I would like to see subsidized support for outsourcing the creation of accessible ebooks. I also found trying to find an outlet to sell our ebooks very difficult. The membership fees for ACP and eBOUND are costly for a small company. (Small publisher)
- Lack of market exposure. We need more dedicated book review space. (Small publisher)
- We have a small staff, and we are asked to do an impossibly broad number of tasks, which makes it hard to focus on books! (Mid-sized publisher)

As for many industries, the question for publishing since 2020 has been: What will work look like in the future? The graph below shows the top changes that Canadian publishers made to navigate COVID-19 that they will continue in the future. For the publishers who answered our survey, the majority said they will continue remote or hybrid work arrangements permanently (63%). This percentage increases with publisher size. Half of small publishers (50%) will implement remote work permanently, 75% of mid-sized publishers will, as will 83% of large publishers.

Small and mid-sized publishers were also interested in keeping some of the digital marketing changes they adopted over the last two years, at 19% and 31% respectively. Small publishers were also keen on virtual or hybrid events (31%) and large publishers will be keeping their paperless and online workflows (33%).

Pandemic-related changes Canadian publishers will continue to leverage, 2021



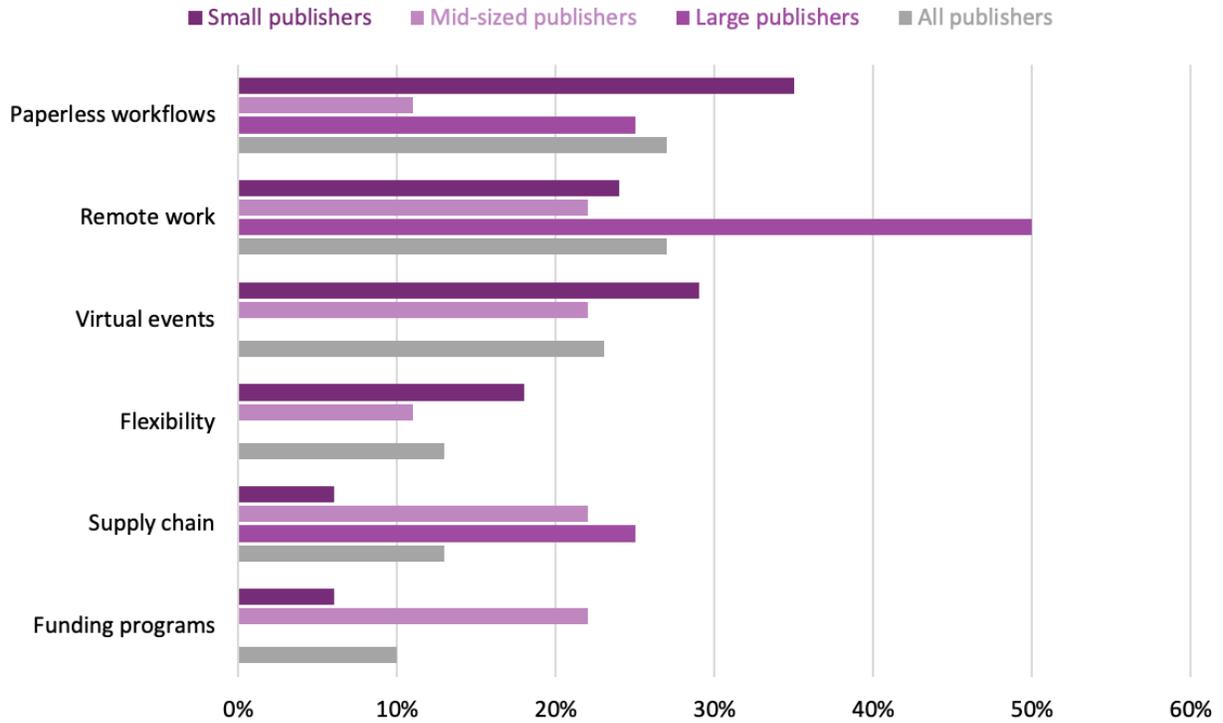
(n=48)

What changes has your company made to navigate COVID-19 that you will continue to leverage permanently?

- We have a very smooth work from home process, which is great for those with young kids and to reduce commuting for employees. (Small publisher)
- Flexible/hybrid work structure, online meetings/appts, reduced distro of physical materials. (Large publisher)
- Our office is operating at half capacity. It is unsure if we will ever go back to a full office. (Mid-sized publisher)
- Move to digital marketing strategies. Hiring employees and out-of-house contractors from across Canada. Flexible hours and work-from-home options. (Mid-sized publisher)
- We'll continue with virtual book launches and increased online advertising vs. hard copy in literary magazines. (Small publisher)
- Flexible hybrid work, paperless processes (shift to digital galleys), more integration of collaborative web tools. Virtual events (hoping to move to combo of in-person and virtual to widen audience engagement and improve accessibility). (Large publisher)
- We always worked remotely but will continue to focus on online and hybrid marketing opportunities, especially for author appearances. (Small publisher)

Across their supply chain partners, publishers would also like to see paperless workflows (27%), remote work (27%), and virtual events (23%) continue following COVID-19, shown in the graph below.

Pandemic-related changes Canadian publishers would like their supply chain partners to continue, 2021



(n=30)

What changes have your company's partners, suppliers, and other vendors made to navigate COVID-19 that you want to see continued?

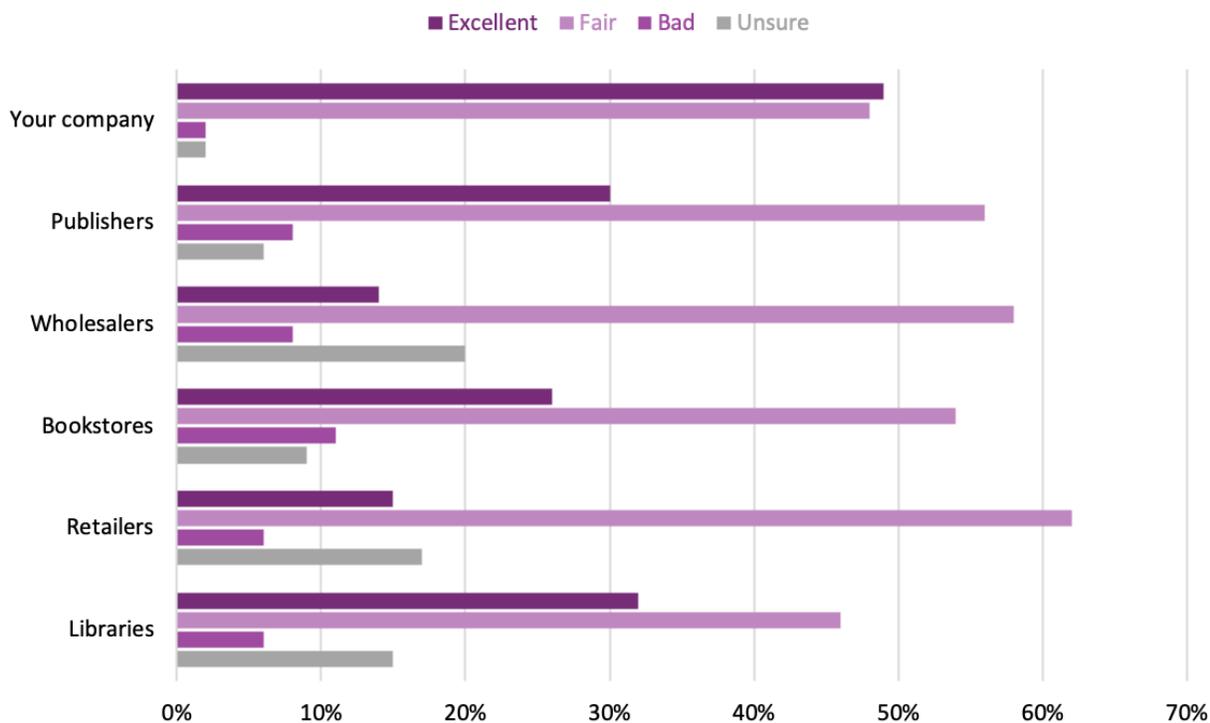
- Virtual sales calls. Digital sales material. (Mid-sized publisher)
- It would be great if booksellers, media, etc. would accept digital ARCs instead of insisting on print ARCs again. Greater kindness and understanding, as well of a sense of us all being in it together, was, alas, fleeting. I would like to see more of that. (Small publisher)
- Doing sales conferences via Zoom has some advantages. Not all of them, but hybrid conferences will be great. Doing pitch meetings via Zoom or phone provides welcome alternatives. (Mid-sized publisher)
- Flexibility has been key including changing publishing dates, adapting to new shipping deadlines, etc. (Small publisher)
- Paperless processes where we would have previously exchanged by mail or courier. Online ecommerce from retailers. More digital marketing by retailers, media outlets. (Large publisher)

Overall, most publishers described the health of their company as excellent in 2021 (49%), based on their ability to withstand challenges, adapt, and change. A further 48% rated their company's health as fair.

Looking more closely, mid-sized publishers were most likely to rate their company as in excellent health (67%) and small publishers were most likely to rate their company's health as fair (54%).

Fair was also how the majority of respondents rated the health of other publishers (56%), wholesalers (58%), bookstores (54%), retailers (62%), and libraries (46%), shown in the graph below.

Industry health as perceived by all Canadian publishers, 2021

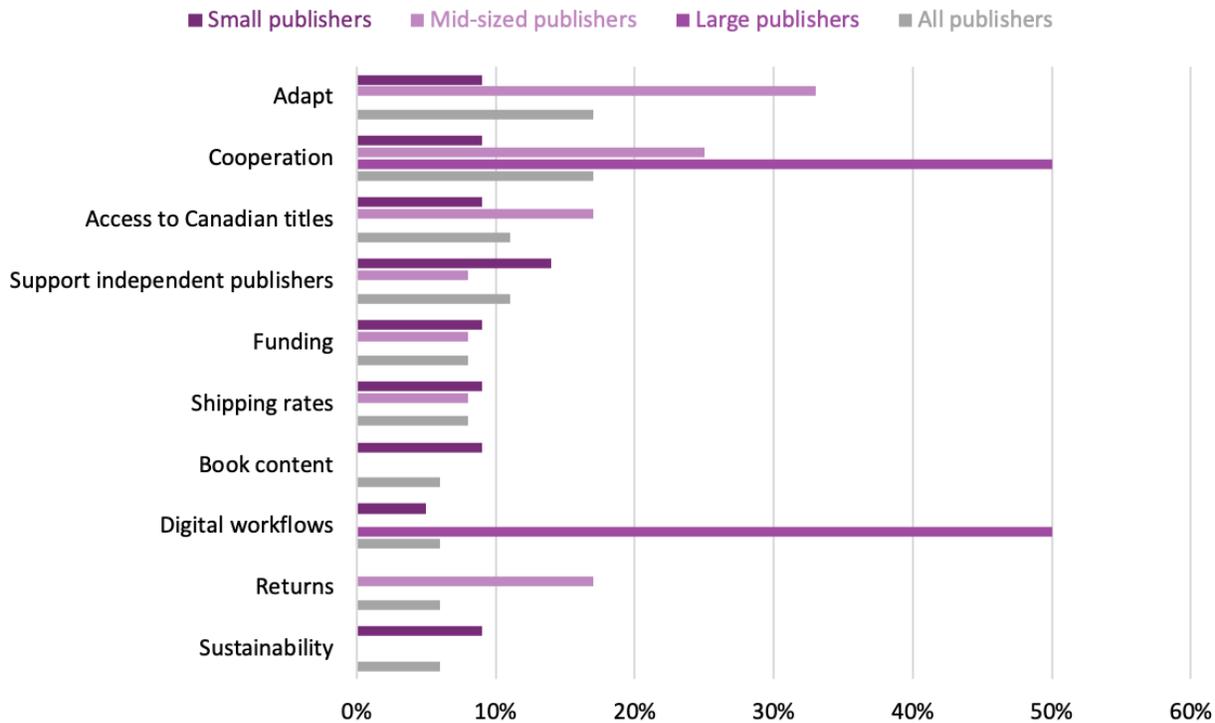


(n=65)

Lastly, publishers shared how the book industry could better withstand challenges in the future. Most felt that the industry should adapt (17%), cooperate (17%), and provide greater access to Canadian titles (11%), shown in the graph below.

Large publishers again consolidated around fewer answer options: cooperation (50%) and digital workflows (50%). In addition to the top three answers for all publishers, 17% of mid-sized publishers also thought addressing returns would help the industry. As expected, small publishers were most likely to advocate for support for independent publishers, at 14%.

How the book industry can better withstand challenges in the future according to Canadian publishers, 2021



(n=36)

What could one or more members of the Canadian book industry do to better withstand challenges, adapt, and thrive?

- Rethink standard practices (returns, prices on books, etc.). (Mid-sized publisher)
- Continue to make the supply chain for books more efficient, both at the beginning of the process by expanding and strengthening print options in Canada, and at the end of the process by making efforts to reduce the overall level of book returns from retailers — reducing returns is a business responsibility shared by publishers and retailers. (Mid-sized publisher)
- Indie bookstores and traditional publishers to adopt more digital ways of working and integrating them into their buying, selling, and communicating. Better collaboration about the various touchpoints between publishers and booksellers: everyone in the supply chain working towards the best possible outcomes and being open to more creative problem solving in changing, challenging times. (Large publisher)
- If we could work together better, it would help all of us. (Small publisher)
- We could all work more collaboratively to ensure the sale and profile of Canadian books. It seems to me that almost everyone realized the importance of the Canadian ecosystem and the importance to Canadians in general. (Mid-sized publisher)
- There needs to be an understanding of the particular distribution, marketing, grant access, and sales challenges faced by emerging publishers, especially BIPOC. (Small publisher)
- Re-introduce Canada Post book rate. (Mid-sized publisher)
- Support indie booksellers; raise purchasing budgets for libraries and schools. (Small publisher)

About BookNet Canada

BookNet Canada is a non-profit organization that develops technology, standards, and education to serve the Canadian book industry. Founded in 2002 to address systemic challenges in the industry, BookNet Canada supports publishing companies, booksellers, wholesalers, distributors, sales agents, and libraries across the country.

BookNet Canada acknowledges that its staff, board, and partners work upon the traditional territories of the Mississaugas of the Credit First Nation, Anishnawbe, Haudenosaunee, and Wendat Indigenous Peoples, the original nations of this land. We endorse the Calls to Action from the Truth and Reconciliation Commission of Canada and support an ongoing shift from gatekeeping to spacemaking in the book industry.

The book industry has long been an industry of gatekeeping. Anyone who works at any stage of the book supply chain carries a responsibility to serve readers by publishing, promoting, and supplying works that represent the wide extent of human experiences and identities, in all its complicated intersectionality. We, at BookNet Canada, are committed to working with our partners in the industry as we move towards a framework that supports “spacemaking,” which ensures that marginalized creators and professionals all have the opportunity to contribute, work, and lead.

BookNet Canada’s services and research help companies promote and sell books, streamline workflows, and analyze and adapt to a rapidly changing market. BookNet Canada sets technology standards and educates organizations about how to apply them, performs market research, and tracks 85% of all Canadian English-language print trade book sales through BNC SalesData.

BookNet Canada has extensive research available on our [website](#), both free and for purchase.

- [Listening In: Audiobook Use in Canada 2021](#): results from our consumer survey on the continued interest of Canadians in acquiring and listening to audiobooks.

- [*Must-Watch, Must-Read: Book-to-Screen Adaptations in the Canadian Book Market 2022*](#): data on the impact of book-to-television and book-to-film adaptations on Canadian book sales and library circulation.
- [*Canadian Leisure & Reading Study 2021*](#): insights into how Canadians are spending their leisure time and the behaviours of Canadian readers in 2021.

To stay updated on current and future research, subscribe to our monthly [BNC Research newsletter](#). To stay up-to-date on all BookNet Canada news and information, [subscribe to our weekly eNews](#).

If you have any questions or comments about this or other studies, please contact the research team at research@booknetcanada.ca.

Industry-led and partially funded by the Department of Canadian Heritage, BookNet Canada has become, as The Globe and Mail puts it, “the book industry’s supply-chain nerve centre.”

Learn more at booknetcanada.ca.