

# **More Canada**

**How can we increase public awareness and reading of  
Canadian-authored books?**

**Resource Materials  
Volume 2**



# Think Tank Sessions: March 6-8

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# Chapter 1

## CBC Radio/Digital

## **CBC RADIO/DIGITAL OVERVIEW: What would it take to put Canadian books first?**

“As part of the [CBC’s] transition to a content company, and the start of the third revolution, we chose to focus on books and music. The senior service has more important book shows than anybody else in the country – *Writers & Company* with Eleanor Wachtel, *The Next Chapter* with Shelagh Rogers, *Canada Reads...*, not to mention the books that are covered or reviewed on *Ideas, Quirks & Quarks*, *Q*, *Definitely Not the Opera* – and sponsors the CBC Literary Awards. ...CBC is pretty much all there is for Canadian publishers and readers.”

- Richard Stursberg, Head of CBC English services from 2004-2010, *The Tower of Babble: Sins, Secrets and Successes Inside the CBC*

“Publishers knew the power of CBC Radio to sell books. Shows like Eleanor Wachtel’s *Writers and Company* and Shelagh Rogers’ *The Next Chapter* had legions of stalwart fans. Regional radio shows across the country interviewed local authors regularly, and we had our CBC Literary Awards in fiction, non-fiction and poetry... The Books team ... planned an ambitious site that would aggregate our content and build robust community around it. ... We launched phase one to applause from the book community ... and soon after live-streamed radio’s *Canada Reads* competition to over twenty-two countries.”

- Denise Dolan, General Manager and Executive Director of CBC English Radio from 2008-2011, *Fearless As Possible (Under the Circumstances): Memoir*

“As part of its five-year strategy *A space for us all*, CBC/Radio-Canada aims to be the public space at the heart of our conversations and experiences as Canadians. ... We are also strongly committed to reflecting our country’s rich diversity through our programming. We want to provide programming where all Canadians can recognize themselves and feel at home.”

- Message from Hubert T. Lacroix, President and CEO; Heather Conway, Executive Vice-President, English Services; and Louis Lalande, Executive Vice-President, French Services, *CBC Inclusion and Diversity: 2015-18 Plan*

### **act**

#### **CBC/Radio-Canada’s mandate**

CBC/Radio-Canada reports annually to Parliament through the Minister of Canadian Heritage. Its public mandate is set out in the [1991 Broadcasting Act](#): “The Canadian Broadcasting Corporation, as the national public broadcaster, should provide radio and television services incorporating a wide range of programming that informs, enlightens and entertains” and “the programming provided by the Corporation should:

- be predominantly and distinctively Canadian, reflect Canada and its regions to national and regional audiences, while serving the special needs of those regions;
- actively contribute to the flow and exchange of cultural expression;

- be in English and in French, reflecting the different needs and circumstances of each official language community, including the particular needs and circumstances of English and French linguistic minorities;
- strive to be of equivalent quality in English and French;
- contribute to shared national consciousness and identity;
- be made available throughout Canada by the most appropriate and efficient means and as resources become available for the purpose; and
- reflect the multicultural and multiracial nature of Canada.”

*Broadcasting Act 1991, Section 3 “Broadcasting Policy for Canada”, part m.*

While the mandate for CBC says nothing specific about Canadian authors or books, there are clear directives throughout the mandate for which books will be enormously supportive. The first bullet of the Broadcasting Act as it relates to the CBC and referencing CBC’s job to be “distinctively Canadian” and “reflect Canada and its regions” could have been written with the Canadian book industry in mind.

[\*CBC Inclusion and Diversity: 2015-18 Plan\*](#) also includes language of particular interest to publishers, authors, and others in our industry: “Inclusion and Diversity (I&D) is integral to achieving this vision, as it highlights the importance of including a range of faces, voices, experiences and perspectives in our content and workplace. The public broadcaster must be relevant to and representative of the population it serves.” (p.3)

Deloitte & Touche in their 2011 study [\*The Economic Impact of CBC/Radio-Canada\*](#) references other impacts beyond the economy stating that “CBC/Radio-Canada’s regional and local activities contribute to the local economies and creative clusters, particularly the creative cluster in Montreal.” (p. 3) and “We examined the impact of CBC/Radio-Canada with respect to the creation of value for others in the creative sector. These comprise such effects as the impact CBC/Radio-Canada has on the implementation of new technologies in broadcasting, promoting digital content and distribution, and supporting Canadian artists. We find evidence to suggest that incremental value is generated in these areas, and that there is a positive net impact. However, due to the diffuse and complex nature of these impacts it is not possible to quantify them robustly.” (p.8) The report goes on to state: “CBC/Radio-Canada has demonstrated over time through its relatively high investment in made in Canada content that it is a platform for nurturing Canadian talent, providing opportunities for emerging artists and an outlet for established stars to showcase their skills. CBC/Radio-Canada also commissions a number of awards designed to recognize and develop talent. CBC/Radio-Canada exposure has also been credited by many artists as a key element in enhancing their careers.” (p.8)

“In terms of radio broadcasting, in 2010, CBC Radio aired 99% Canadian content over the broadcast day, and 100% Canadian content during its prime time (which for radio takes place from 6:00 to 9:00 am on weekdays). Radio de (*sic*) Radio-Canada’s Canadian content was 100% during the broadcast day and 100% during prime time.” (p.15)

“Also, CBC/Radio-Canada talk radio channel, Radio 1, generates benefits to Canadian artists by showcasing Canadian creativity. A good example of this is the impact that the CBC/Radio-Canada program *Canada Reads* has been shown to have on sales of featured books. ... The winning books frequently become best sellers and the program generally creates exposure for the writers.” (p.92)

Stursberg’s *The Tower of Babble* and Donlan’s *Fearless As Possible* show how these two executives in their important and influential roles in the Corporation interpreted the mandate to considerable benefit to publishers and authors.

Stursberg in particular oversaw three “revolutions”: national, local and digital in which the shows were directed “to become reflections of the fullness of the places they served”. (p.220) His vision for a book portal to serve Canadian book lovers, launched by Donlon in 2011(?), was “to pull together in one place all of the CBC’s book assets ... We wanted to gather up all the scattered bits and pieces of book interest and make something that was much bigger than the sum of its parts, a place where Canadians could find the best and most comprehensive coverage of books, we wanted to be CBC Books, the Canadian Home of Books.

CBC Books would be a place where readers could go to find everything bookish they wanted: bestseller lists, reviews, all of our interviews and book talk, prize information, book clubs, contests, promotions, authors’ tours, literary festivals. It would be one-stop shopping for bookworms. Properly done, it would also provide an opportunity for Canadian publishers and retailers to sell more books. We wanted a place where Canadians could come, read a review, hear a talk, check the prize-winners and order that book right away online. It would be nice for everyone... .”( *The Tower of Babble*, p.229-30).

## **CBC Digital**

[CBC Books](#) is certainly “nice for everyone”. It has pages for CBC Literary Prizes, Canada Reads, Canada Writes and Reading Lists that currently relate to the Olympics, *Canada Reads* contenders and presenters, Black History month, “100 novels that make you proud to be Canadian”, “100 true stories that make you proud to be Canadian” and another for YA titles. It includes weekly bestseller lists in fiction, non-fiction and kids provided by BookNet Canada (BNC), and spring book previews; all of this material is posted to Facebook, Twitter, YouTube and Instagram and is provided to consumers via mobile, RSS, podcasts and newsletters. Apart from the book ordering piece, CBC Books basically fulfills Stursberg’s vision and more.

## **Analytics: CBC Programming and Services**

CBC’s [Celebrating Canadian Culture: Annual Report 2016-2017](#) focusses on audience reach and share through its various platforms. English services results for Radio One and 2 show an all-day

audience share at 18.5% for 2015-16. CBC TV 2016-17 prime time audience share is at 5.5% with CBC News Network at 1.6%.

Regional radio numbers, not surprisingly, reflect audience loyalty with results that show CBC Radio One morning show audience share for 2015-16 at 20.4%. TV local news at 6PM for 2016-17 commands a 313K average minute audience, down from 345K in 2015-16 and CBC.ca regional offering at 10.6M up considerably from 4.3M in 2015-16 monthly average unique visitors.

Overall digital offering shows an impressive 14.8M monthly average unique visitors in 2016-17 up from 12.4M in 2015-16.

There's little research on the impact of CBC programming on the sales of Canadian books either undertaken by CBC itself, BNC or industry associations. However, the Atlantic Publishers Marketing Association (APMA) undertook two studies to follow up on the effectiveness of their Holiday Season catalogues that uncovered some interesting correlations between CBC book coverage and book buyers' habits. The [Holiday Season Survey 2018](#) noted that 50% of book buyers browse the local sections of bookstores and that "those who visit the local sections are more likely to have read newspapers, listened to CBC radio, tuned into ATV Evening News, and/or watched CBC Television." (p16). 52% of book buyers [in the Atlantic provinces] listen to CBC at least one day a week... and one in ten consumers (12%) listen every day. (p.39) The researchers concluded that there is a strong correlation between listening to CBC and frequenting the local section of a bookstore and purchasing books locally." (p.40)

### **Specific CBC book programs and their impact: Canada Reads, Massey Lectures, The Next Chapter**

In BookNet Canada's [How Canadians Buy Books, 2015](#) the authors note that the old marketing "rule of three", that is the number of times a consumer needs to be exposed to a product before purchase, has now, with the expansion of social media channels, become the rule of seven suggesting that significantly more media channels must be exploited by marketers to affect the decision to buy. The informative chart (p.5) in the BNC study shows that the top three reasons book buyers purchase are browsing (online and in physical store) at 19.3%, read a previous book by the author or in a series at 18.4%, and reviews and recommendations at 13.4%. Author interviews at 3.3% and award nominations at 2.7% though lower influencers may still significantly influence the consumer to purchase given the rule of seven. CBC's book portal further pushes out information on social media sites, so that having a book on any award list, bestseller list or CBC compiled list is going to significantly affect sales.

BNC looking at the influence of awards on book buying in [Canadians Reading Winners: Are book buyers influenced by literary awards?](#), 2014 noted that 20% of respondents "bought a winning or nominated book in the prior month" (p.2) but 62% made their book purchases regardless of an award nomination. (p.4) Interestingly, book buyers aged 25-34 are most influenced by awards, while respondent over 55 were only moderately influenced. (p.6) Using SalesData research conducted for nominees, BNC also noted, not surprisingly, that "while literary award

nominations improve sales for everyone, the winner experiences the greatest increase in sales.” (p.10) BNC also noted that there are many other factors that lead to increased sales of books nominated for awards including cross-award nominations, more media attention and increased marketing by the publisher, and the fact that some awards are more impactful than others. (p.10) There is perhaps no other award/promotion in Canada that generates as much interest as *Canada Reads*.

## Canada Reads

[CBC Media Centre](#) in announcing the 2018 longlist for Canada Reads stated: “Each year, the shortlisted *Canada Reads* books see a significant rise in sales, and the winning book stays on bestseller lists for months. For the past three years, all five shortlisted titles appeared on Canadian bestseller lists in the weeks leading up to the debates.” As we all know in the book industry, getting a title on the *Canada Reads* list leads to significant sales.

The recent BNC blog, [Literary Awards: Canada Reads](#), January 2018 provides specific information on exactly how significant the sales may be, “Being named to the shortlist, on average, gives the titles phenomenal sales boosts. Although we can’t reveal actual sales numbers, we can share that in 2017, each of the five nominated titles experienced an increase in sales the week following the shortlist announcement, with an average increase of 355%. While the majority of the industry undergoes a post-Christmas sales slump, the *Canada Reads* finalists buck the trend as their sales grow to levels that meet or exceed holiday levels leading up to debate week. ... The winner in particular goes on to enjoy both major media attention and sustained sales for several weeks after the contest. To give you an idea, sales for the past seven winning titles increased by an average of 434% in the week following the competition.

Debate week also has a positive impact on sales for the rest of the nominees. In previous years, nominees voted off earlier in the week experienced less of a sales impact than those who made it to the end of the week. This trend was not observed in 2017, however, as *The Break*, the title voted off on day one of the debate, saw the second-highest market shift after the winning title. Sales of *The Break* were likely also influenced by other award nominations, including the 2016 Governor General’s Literary Award and the 2016 Rogers Writers’ Trust Fiction Prize.”

## The Next Chapter

*The Next Chapter*’s mandate is devoted to Canadian writers and songwriters and the program is hosted by one of the most beloved of CBC personalities Shelagh Rogers. Unfortunately, there are no statistics available on audience or sales of books reviewed.

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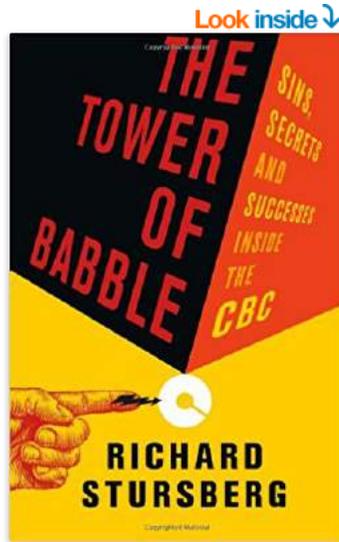
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#### Review

.To cut to the chase, the liveliest parts of The Tower of Babble, Richard Stursberg's anxiously awaited new book about his six turbulent years as head of CBC's English services, are the passages where he goes after his perceived enemies with a hatchet.... (Martin Levine Toronto Star 2012-04-11)

.Far from being a dry account of day-to-day business, this book provides an informative, and rarely flattering perspective of the confused inner workings of

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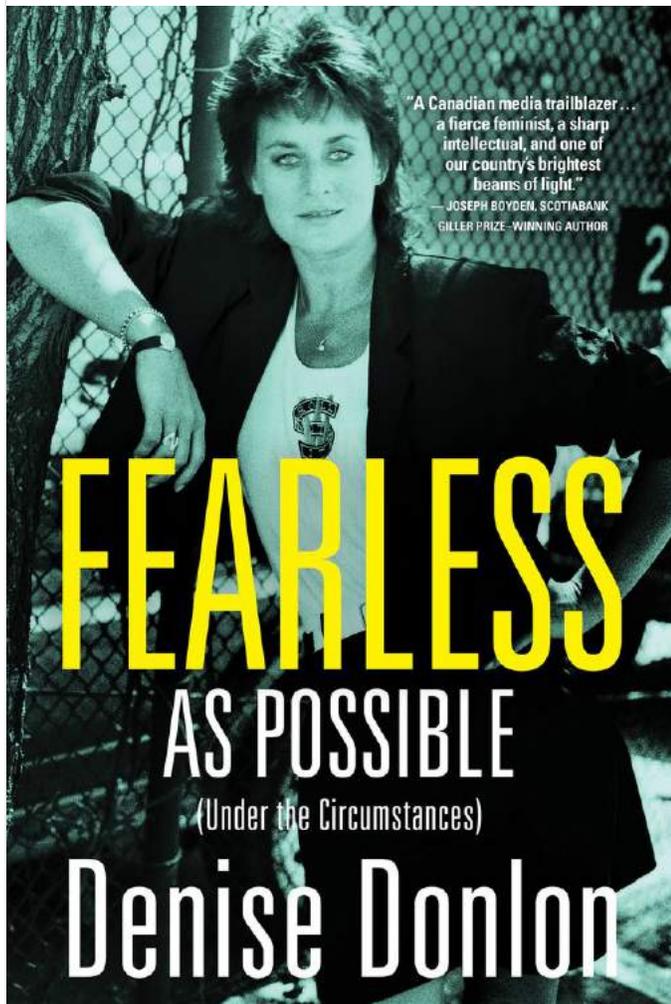
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In this smart, funny, and inspiring memoir, Donlon chronicles her impressive and storied career, which has put her on the frontlines of the massive changes in the music industry and media. She chronicles her early days at *MuchMusic* and the music journalism show *The NewMusic*, where she was a host and producer, and quickly moved up the ranks to become director of music programming, then VP and general manager. Her mandate was relevance, during a time when music videos became a medium that would change pop music and popular culture forever. She became the first female president of Sony Music Canada, where she navigated the crisis in the music industry with the rise of Napster and the new digital revolution. She then joined CBC English Radio as General Manager and Executive Director when the corporation absorbed funding cutbacks, leading to mass reductions in people and programming and leaving a shadow over the future of Canada's national public broadcaster.

Throughout her incredible journey, she shares colourful and entertaining stories of growing up tall, flat, and bullied in east Scarborough; interviewing musical icons such as Keith Richards, Run-DMC, Ice-T, Joni Mitchell, Neil Young, Annie Lennox, and Sting; working with talent agent Sam Feldman, media pioneer Moses Znaimer, executive vice-president of CBC Radio Richard Stursberg, and her co-host on the current affairs magazine show *The Zoomer*, Conrad Black. And finally, she details her life-changing experiences with War Child Canada and her work with other charitable organizations, including Live8 and the Clinton Giustra Enterprise Partnership.

Told with humour and honesty, *Fearless as Possible (Under the Circumstances)* is a candid memoir of one woman's journey, navigating corporate culture with integrity, responsibility, and an irrepressible passion to be a force for good.



2015-2018  
PLAN

CBC  Radio-Canada

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## MESSAGE FROM HUBERT T. LACROIX, HEATHER CONWAY AND LOUIS LALANDE



As part of its five-year strategy *A space for us all*, CBC/Radio-Canada aims to be the public space at the heart of our conversations and experiences as Canadians. Inclusion and Diversity (I&D) is integral to achieving this vision, as it highlights the importance of including a range of faces, voices, experiences and perspectives in our content and workplace. The public broadcaster must be relevant to and representative of the population it serves. In light of this, it is our pleasure to present our Inclusion and Diversity Plan 2015-2018.



Since the release of our last Inclusion and Diversity Corporate Plan in 2012, our I&D approach has become more integrated. While the 2015-2018 plan focuses on human resources activities to help the Corporation remove employment barriers for diverse candidates and positively impact the make up of our workforce, this is only part of our efforts. We are also strongly committed to reflecting our country's rich diversity through our programming. We want to provide programming where all Canadians can recognize themselves and feel at home.

To support this endeavour, CBC/Radio-Canada is involved in a number of training and networking activities. These include:

- At CBC, a development workshop for diverse content creators, providing participants with the tools and resources they need to develop their own pitches for original programming;
- At CBC, a yearly networking event that focuses on facilitating connections between emerging diverse talent, experienced creators, decision makers and our production partners;
- At Radio-Canada, a working group on diversity in drama series, bringing together all levels of the industry.

A number of Corporation-led initiatives target specific communities, such as:

- A new learning journey at Radio-Canada to encourage the hiring of more Aboriginal employees within News and Current Affairs and similarly, at CBC, we are working with our Aboriginal unit and leadership across the country to improve recruitment and internship opportunities;
- Coordinated, multiplatform programming for targeted events, such as our initiatives surrounding Black History Month.

**TABLE 1: CBC/RADIO-CANADA WORKFORCE ANALYSIS\* BY EMPLOYMENT EQUITY OCCUPATIONAL GROUP**  
(Updated December 31, 2011)

Employment Equity Occupational Group	All Employees	Aboriginal Peoples		Members of Visible Minorities		Persons with Disabilities		Women					
		Representation		Industry Availability		Representation		Industry Availability		Representation			
		#	%	#	%	#	%	#	%	%			
01: Senior Managers	11	0	0.0%	2.9%	0	0.0%	10.1%	11	1.2%	3.2%	5	45.5%	27.4%
02: Middle and Other Managers	929	8	0.9%	2.2%	69	7.4%	15.0%				480	51.7%	38.9%
03: Professionals	3609	49	1.4%	2.0%	220	6.1%	14.7%	53	1.5%	4.5%	1874	51.9%	43.1%
04: Semi-Professionals and Technicians	2628	44	1.7%	3.0%	163	6.2%	11.3%	41	1.6%	4.8%	701	26.7%	26.6%
05: Supervisors	14	0	0.0%	1.3%	2	14.3%	24.6%	0	0.0%	9.5%	8	57.1%	51.4%
07: Administrative and Senior Clerical Personnel	182	2	1.1%	1.3%	15	8.2%	17.9%	1	0.5%	2.6%	154	84.6%	80.5%
08: Skilled Sales and Service Personnel	1	0	0.0%	0.0%	0	0.0%	0.0%	0	0.0%	5.6%	1	100.0%	0.0%
09: Skilled Crafts and Trades Workers	7	0	0.0%	1.8%	0	0.0%	5.5%	0	0.0%	5.3%	1	14.3%	3.7%
10: Clerical Personnel	641	9	1.4%	1.8%	65	10.1%	26.6%	14	2.2%	4.4%	472	73.6%	64.6%
11: Intermediate Sales and Service Personnel	149	1	0.7%	1.5%	7	4.7%	24.9%	0	0.0%	5.3%	106	71.1%	63.2%
12: Semi-Skilled Manual Workers	15	0	0.0%	0.9%	1	6.7%	22.7%	0	0.0%	5.5%	3	20.0%	18.4%
13: Other Sales and Service Personnel	10	0	0.0%	1.1%	1	10.0%	44.8%	0	0.0%	6.5%	0	0.0%	55.6%
<b>Total</b> (may not equal sum of components due to rounding)	8196	113	1.4%	2.3%	543	6.6%	14.9%	120	1.5%	4.4%	3805	46.4%	40.1%

\* Includes permanent full-time and permanent part-time employees. The "Industry Availability" represents the Canadian labour force availability, based on Statistics Canada's 2011 National Household Survey (for Aboriginal peoples, members of visible minorities and women) and 2012 Canadian Survey on Disability (for persons with disabilities).

**TABLE 2: CBC/RADIO-CANADA WORKFORCE ANALYSIS\* BY EMPLOYMENT EQUITY OCCUPATIONAL GROUP**

(Updated December 31, 2014)

Employment Equity Occupational Group	All Employees	Aboriginal Peoples		Members of Visible Minorities			Persons with Disabilities			Women			
		Representation		Industry Availability		Representation		Industry Availability		Representation		Industry Availability	
		#	%	#	%	#	%	#	%	#	%	#	%
01: Senior Managers	8	0	0.0%	2.9%	1	12.5%	10.1%	11	1.3%	4.3%	4	50.0%	27.4%
02: Middle and Other Managers	864	5	0.6%	2.2%	72	8.3%	15.0%				471	54.5%	38.9%
03: Professionals	3032	40	1.3%	2.0%	253	8.3%	14.9%	43	1.4%	3.8%	1553	51.2%	43.9%
04: Semi-Professionals and Technicians	1985	44	2.2%	3.1%	145	7.3%	11.2%	45	2.3%	4.6%	530	26.7%	26.0%
05: Supervisors	10	0	0.0%	1.1%	1	10.0%	28.1%	0	0.0%	13.9%	6	60.0%	51.7%
07: Administrative and Senior Clerical Personnel	184	4	2.2%	1.2%	25	13.6%	19.1%	0	0.0%	3.4%	132	71.7%	80.5%
08: Skilled Sales and Service Personnel	2	0	0.0%	0.8%	0	0.0%	9.9%	0	0.0%	3.5%	2	100.0%	46.8%
09: Skilled Crafts and Trades Workers	1	0	0.0%	1.8%	0	0.0%	6.0%	0	0.0%	3.8%	0	0.0%	1.5%
10: Clerical Personnel	485	5	1.0%	1.5%	57	11.8%	27.4%	13	2.7%	7.0%	361	74.4%	64.5%
11: Intermediate Sales and Service Personnel	147	2	1.4%	1.3%	7	4.8%	23.3%	0	0.0%	5.6%	100	68.0%	62.8%
12: Semi-Skilled Manual Workers	12	0	0.0%	0.9%	1	8.3%	22.7%	0	0.0%	4.8%	2	16.7%	18.4%
13: Other Sales and Service Personnel	9	0	0.0%	0.8%	1	11.1%	49.6%	0	0.0%	6.3%	1	11.1%	55.0%
<b>Total</b> (may not equal sum of components due to rounding)	6739	100	1.5%	2.3%	563	8.3%	15.1%	112	1.7%	4.4%	3162	46.9%	40.8%

\* Includes permanent full-time and permanent part-time employees. The "Industry Availability" represents the Canadian labour force availability, based on Statistics Canada's 2011 National Household Survey (for Aboriginal peoples, members of visible minorities and women) and 2012 Canadian Survey on Disability (for persons with disabilities).



## 2015-2018 INCLUSION AND DIVERSITY PLAN – ACTION PLAN

CATEGORY	OBJECTIVE	ACTIVITY	RESPONSIBILITY	YEAR
LEADERSHIP	Ensure Senior Executive Team (SET), first-line/middle managers and unions are committed to and participate fully in achieving the plan's objectives.	Ensure that diversity is a corporate priority, and that this is directly conveyed by the CEO to his VPs.	SET	2015-2018
		Raise accountability of senior managers for employee diversity using a quantitative index measuring new external hires.	VP of People and Culture (P and C)	2015-2018
		Continue to use the JEEC as a forum for discussing diversity-related issues, including ways to create openings and promotions for designated group members.	P and C	2015-2018
		Update employees on the progress of this plan through internal communications platforms, including Inclusion and Diversity Committees.	P and C, and Corporate Communications	2015-2018

CATEGORY	OBJECTIVE	ACTIVITY	RESPONSIBILITY	YEAR
MONITORING AND ACCOUNTABILITY	Implement effective performance indicators to ensure success of the plan.	Update monitoring systems to track diversity candidates throughout the recruitment and promotion process.	P and C	2015-2018
		Complete an analysis of short-term employee hires and take action based on findings.	P and C	2015-2018
		Measure how effective targeted posting strategies are at attracting diversity candidates, and adjust accordingly.	P and C	2015-2018

## 2015-2018 INCLUSION AND DIVERSITY PLAN – ACTION PLAN (cont'd)

CATEGORY	OBJECTIVE	ACTIVITY	RESPONSIBILITY	YEAR
RECRUITMENT AND SELECTION	Reduce the representation gaps of diversity candidates by ensuring that the diversity hiring target exercise is communicated effectively to those responsible for recruitment and hiring.	Support managers in the three-year diversity hiring target exercise, monitor results using the appropriate reports and recruitment strategies (at least every six months), and raise manager awareness, as needed.	P and C	2015-2018
		Set diversity goals in the performance objectives for recruitment personnel to support the business in achieving hiring objectives.	P and C	2015-2018
		Develop internal diverse candidate talent pools (e.g., casual/temporary employees or star candidates who haven't been hired but with whom we wish to remain in contact).	P and C	2015-2018
		Forge and maintain partnerships with employment agencies, and measure return on investment.	P and C	2015-2018
		Attend recruitment activities (e.g., open houses, diversity-targeted career fairs, university career fairs).	P and C	2015-2018
		When updating the staffing policy, look into the possibility of implementing guidelines or procedures for hiring interns that stress the importance of recruiting diversity candidates.	P and C	To be determined (TBD)
		When updating the staffing policy, look into the possibility of implementing guidelines or procedures on referral that stress the importance of recruiting diversity candidates.	P and C	TBD



## 2015-2018 INCLUSION AND DIVERSITY PLAN – ACTION PLAN (cont'd)

CATEGORY	OBJECTIVE	ACTIVITY	RESPONSIBILITY	YEAR
LEARNING AND DEVELOPMENT	Provide necessary training and information to the people who will be implementing plan initiatives.	Training / raising of awareness among senior executives.	P and C (Learning and Development)	2015-2016 Project development and positioning  2016-2017 Roll-out
		P and C training (HR and industrial relations consultants, recruitment consultants).	P and C (Learning and Development)	2015-2016 Project development and positioning  2016-2017 Roll-out
		Manager training.	P and C (Learning and Development)	2015-2016 Project development and positioning  2017-2018 Roll-out
		Employee training.	P and C (Learning and Development)	2015-2016 Project development and positioning  2017-2018 Roll-out
	Review and optimize certain development processes that support objectives of the Inclusion and Diversity Plan.	Review integration program tools and processes.	P and C (Learning and Development)	TBD
		Review the succession planning process.	P and C (Learning and Development)	2015-2016

## The Economic Impact of CBC/Radio- Canada.

Report for CBC/Radio-Canada

8 June 2011

This report has been prepared on the basis of the limitations set out in the engagement letter and the matters noted in the Important Notice From Deloitte on page 1.

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- CBC/Radio-Canada's commissioning of independent productions in 2010 lead to \$1,123 million in independent TV production GVA and NVA of \$492 million for the sector, of which \$245 million is additional to the NVA estimate above.
- CBC/Radio-Canada helps create diversity and depth in the Canadian independent production sector through commissioning a wide range of genres and committing substantial funds for program development.
- CBC/Radio-Canada's regional and local activities contribute to the local economies and creative clusters, particularly the creative cluster in Montreal.
- CBC/Radio-Canada creates additional economic value for other broadcasters and wider creative sector in Canada through its role in implementing new technologies, promoting digital content and third party distribution and by its support to Canadian artists.

## Measuring the economic impact of CBC/Radio-Canada

### The scope of CBC/Radio-Canada's economic activities

The scope of this report includes all the main economic activities of CBC/Radio-Canada.

The public service mandate of CBC/Radio-Canada is reflected in its focus on original Canadian content in English and in French, as well as in its regional presence. CBC/Radio-Canada's principal TV services which implement its public service mandate comprise the two main TV channels CBC Television (in English) and Television de Radio-Canada (in French), and CBC/Radio-Canada's five specialty TV channels. CBC/Radio-Canada's radio services are arguably even better recognised for their public service aspects, including the main English and French talk and music radio services, as well as Radio-Canada International ("RCI") and regional radio stations. Associated with the TV and radio services, CBC/Radio-Canada also provides online content through its main media websites CBC.ca (in English) and Radio-Canada.ca (in French), as well as its dedicated content streaming site tou.tv (in French) and various web radio services.

Through these services and activities CBC/Radio-Canada has an economic impact in generating economic value added both directly through its own spend on its people and on suppliers and services, as well as more widely through additional effects both in the creative sector and in the wider economy.

### The methodological framework for assessing CBC/Radio-Canada's economic impact

Our approach to estimating the economic impact of CBC/Radio-Canada is in two parts.

In the first part, we estimate the gross and net value added of CBC/Radio-Canada. Gross Value Added ("GVA") is an estimate of value generated for the Canadian economy as a result of an organisation's economic activity. We apply standard economic impact analysis which distinguishes three types of GVA impact: direct value added and the wider indirect and induced impacts.<sup>1</sup> The

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<sup>1</sup> Direct value added for an organisation is defined as the value of total sales or revenue less expenditure on goods or services purchased from other organisations. This is roughly equivalent to the wage bill and operating surplus of the

wider indirect and induced impacts are estimated by applying multipliers to CBC/Radio-Canada's direct expenditure. We use multipliers estimated by Statistics Canada for appropriate sectors.

The Net Value Added (“**NVA**”) is the difference between the GVA that we estimate for CBC/Radio-Canada and an equivalent measure of GVA that we estimate for a commercially funded and focused counterfactual CBC/Radio-Canada. The counterfactual scenario sets out what CBC/Radio-Canada and the wider creative sector would be like without the current public service mandate. This is specifically designed to facilitate an assessment of the net incremental contribution to the Canadian economy from the public service mandate and government funding given to CBC/Radio-Canada.

In the second part of the report, we examine the impact of a number of ‘spill-over effects’. Spill-over effects are by-products of an organisation’s activity, experienced by other firms in the same sector or by the wider economy. We consider CBC/Radio-Canada’s spill-over effects relating in particular to the independent production sector, CBC/Radio-Canada’s investment in regional clusters, and some of the ways in which CBC/Radio-Canada creates value for others in the Canadian creative industries and wider economy.

## Part I - CBC/Radio-Canada’s GVA and NVA

Our estimates show that CBC/Radio-Canada generated a GVA of \$3.7 billion in 2010, arising from an expenditure of \$1.7 billion due to the indirect and induced multiplier effects.

### CBC/Radio-Canada’s value add composition by service

In line with the level of expenditure, Television contributes the highest GVA amongst CBC/Radio-Canada’s activities accounting for approximately 71%. Radio contributes \$752 million GVA to the Canadian economy. The contribution of Radio in comparison to TV is smaller as a result of lower expenditure levels as well as lower multipliers for programming. Specialty Services contribute \$263 million GVA.

These GVA numbers can be further broken down by the language of broadcast. The private national conventional broadcasters expend significantly more in English language services compared to French language services due to commercial considerations. However, CBC/Radio-Canada’s spend and investment in French language services reflects its obligation to promote English and French languages in the Canadian society. CBC/Radio-Canada each year generates over \$1.5 billion GVA through French language services in TV and Radio compared to \$1.9 billion from English language services. This corresponds to the intent of CBC/Radio-Canada to make linguistic duality a priority and to reflect Canada’s regional diversity through its broadcasting.

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organisation. Indirect impact is the impact of the organisation on the GVA of firms in the supply chain which supply goods and services purchased by the organisation in question. Induced impacts arise on the GVA of firms outside the immediate supply chain, as a result of the expenditure of the organisation’s own employees and those in the supply chain.

Overall, we estimate that the impact of the government funded CBC/Radio-Canada in the GVA of the creative sector cluster in Montreal is \$52.4 million. The majority of this estimate is a direct employment impact, estimated to be over 1,500 full time employees. In addition to the employment impact, without CBC/Radio-Canada's current strong presence in Montreal, due to relatively high focus on French services, the firms in the cluster would be 0.2% less productive, which implies a \$0.5 million impact on the cluster GVA. The productivity impact is additional to the NVA impact shown in Table 2 above. However, this could be offset in the counterfactual by movement of jobs to a larger cluster in Toronto.

### Other impacts of CBC/Radio-Canada on creating value for others

We examine the impact of CBC/Radio-Canada with respect to the creation of value for others in the creative sector. These comprise such effects as the impact CBC/Radio-Canada has on the implementation of new technologies in broadcasting, promoting digital content and distribution, and supporting Canadian artists. We find evidence to suggest that incremental value is generated in these areas, and that there is a positive net impact. However, due to the diffuse and complex nature of these impacts it is not possible to quantify them robustly.

*CBC/Radio-Canada's leading role on implementing new technologies:* CBC/Radio-Canada is often at the forefront of implementing new technologies in broadcasting. As a government funded broadcaster with focus on original Canadian content, it is uniquely placed in Canada to gain exposure, test and lead the implementation of emerging technologies, acting as a test bed for the wider industry.

*Promoting digital content and distribution:* CBC/Radio-Canada plays an active role in promoting digital content and distribution methods in Canada through its own net portals, particularly cbc.ca, radio-canada.ca and tou.tv. Also the provision of Canadian content produced by CBC/Radio-Canada to third party distributors helps promote Canadian productions, and generate additional revenues for the distributors used.

*Supporting Canadian artists:* CBC/Radio-Canada has demonstrated over time through its relatively high investment in *made in Canada* content that it is a platform for nurturing Canadian talent, providing opportunities for emerging artists and an outlet for established stars to showcase their skills. CBC/Radio-Canada also commission a number of awards designed to recognize and develop talent. CBC/Radio-Canada exposure has also been credited by many artists as a key element in enhancing their careers.

Source: CBC/Radio-Canada's 2009-2010 Annual Report

### 2.1.3 Basis of funding

The majority of CBC/Radio-Canada's funding is in the form of the Parliamentary Appropriation (hereafter "public funding"), which is used to support the delivery of the public service mandate. This is supplemented mainly by income from advertising carried on both English and French TV broadcasts, and from subscription revenues related to Specialty Services. In addition, CBC/Radio-Canada earns other income including revenues from the leasing of space, facilities and services; program sales; commercial production sales; host broadcaster's activities; net gains from disposal of equipment; and other minor items.

The funding model affects the incremental economic impact of CBC/Radio-Canada, discussed further and estimated in Sections 4 and 5.

## 2.2 Canadian content

We discuss below some of the ways in which CBC/Radio-Canada attains the key goals outlined within its mandate as a public broadcaster through providing high quality original Canadian content and through its balance of English and French language services.

### 2.2.1 Focus on Canadian content

CBC/Radio-Canada has a long history as the largest supplier of original Canadian television content. This is reflected in the prevalence of Canadian content in the CBC/Radio-Canada schedules compared to private broadcasters, and in the balance of expenditure between Canadian and foreign content.

#### Priority on Canadian content

In 2010, CBC Television showed 81% Canadian programming over the full broadcast day, and 81% Canadian programming during evening prime time hours (from 7:00 to 11:00 pm). On the French side, Télévision de Radio-Canada aired 80% Canadian content during the day and 91% during prime time. In terms of radio broadcasting, in 2010, CBC Radio aired 99% Canadian content over the broadcast day, and 100% Canadian content during its prime time (which for radio takes place from 6:00 to 9:00 am on weekdays). Radio de Radio-Canada's Canadian content was 100% during the broadcast day and 100% during prime time.

It is not just the higher weight given to Canadian content in the overall schedule, but also the priority given to Canadian content in prime time that distinguishes CBC/Radio-Canada from the private broadcasters. Indeed, in the 2010 broadcast year, CBC/Radio-Canada either met or outperformed all targets related to Canadian content programming as set by CRTC as summarised in Table 4.

**Table 4: Canadian programming content targets and results**

Canadian content	2010 Targets	2010 Results
<b>CBC Television</b>		
Broadcast day	75%	81%
Prime time	80%	81%
<b>Télévision de Radio-Canada</b>		
Broadcast day	75%	80%
Prime time	80%	91%
<b>CBC Radio</b>		
Broadcast day	99%	99%
Prime time	100%	100%
<b>Radio de Radio-Canada</b>		
Broadcast day	99%	100%
Prime time	100%	100%

Source: CBC/Radio-Canada's 2009-2010 Annual Report

The figures in Table 4 contrast with the Canadian content provided by private broadcasters. The CRTC places requirements on private television and radio licence holders to achieve specific Canadian content levels. For television, depending on the type of network, this is generally set at 60%, measured over the course of the entire broadcast day rather than prime time, and is set at 50% between 6 pm and midnight. Some networks have lower targets; for example, TV5 Québec Canada commits only 15% of its programming to the distribution of Canadian programs during the day and prime time.

It appears that some television networks have found it challenging to achieve their mandated Canadian content targets. For example, in October 2010, the CRTC received requests from CTV and Rogers to reduce their minimum Canadian content requirements from 60% to 55%, at some 35 over the air ("OTA") stations across the country. While this request was rejected, more flexible Canadian content regulations are expected to come into effect for private broadcasters in the near future<sup>5</sup>. This has significant implications for our analysis in Section 5 and 6.

### Canadian Content Expenditures

In 2010, Canadian television and radio programming comprised approximately 93% of CBC/Radio-Canada's programming budget. Compared to private conventional OTA television programming by other Canadian broadcasters, CBC/Radio-Canada invests significantly more than all of the other conventional broadcasters combined on Canadian content (Figure 1).

<sup>5</sup> <http://www.tvb.ca/pages/crtc+rejects+ctv+and+rogers+bid+for+reduction+of+canadian+content.htm>

- **Playing more variety:** Commercial radio is programmed in narrowly defined genres with a typical library size between 400 and 800 tracks. A conservative estimate shows CBC/Radio-Canada radio playing more than 10,000 songs by 5,000 acts during the last year in a wide variety of genres.
- **Rotating tracks more frequently:** Commercial radio will play a hit song for 20 to 75 weeks depending on the station's format (the older the target demographic, the slower the turnover) while last year, CBC/Radio-Canada radio averaged less than 6 weeks on any current track.
- **Playing more Canadian music.** While commercial radio broadcasters tend to adhere to the minimum Canadian Content requirements in their licences, between 35 and 40%, whereas CBC/Radio-Canada always exceeds 50% on their pop music formats.

### Direct support for artists

CBC/Radio-Canada has a number of awards which are committed to promoting creativity. An example is CBC/Radio-Canada Canadian Reflections award which aims to recognize and develop new Canadian talent with the winning applicant awarded a cash prize which goes towards production costs of a short program.

CBC/Radio-Canada argue that concert recordings and plays on Radio have had a positive effect on musicians and venues and presenting organizations across the country. In particular, the impact is greatest on the emerging artists who are trying to build an audience beyond their city/province borders. In addition, many festivals have benefitted from the increased exposure by having CBC/Radio-Canada broadcasting them. It creates exposure, therefore increasing attendance and adding credibility to the festivals. This provides a platform for Canadian artists to be discovered.

CBC/Radio-Canada exposure has also been credited with increasing artists CD sales. A number of artists have seen their CD sales rise by as much as 185%<sup>77</sup> after appearing on CBC/Radio-Canada. This goes to emphasize that CBC/Radio-Canada exposure can be a key element of enhancing careers in Canada.

There is a wealth of anecdotal evidence of the impact this has had on popularity and sales of Canadian musicians.

### Benefits from CBC/Radio-Canada talk radio

Also CBC/Radio-Canada talk radio channel, Radio 1, generates benefits to Canadian artists by showcasing Canadian creativity. A good example of this is the impact that CBC/Radio-Canada program Canada Reads has been shown to have on sales of featured books. "Canada Reads" is an annual book competition organised by CBC/Radio-Canada. The winning books frequently become best sellers and the program generally creates exposure for the writers.

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<sup>77</sup> CBC/Radio-Canada data



CANADA

CONSOLIDATION

CODIFICATION

## Broadcasting Act

## Loi sur la radiodiffusion

S.C. 1991, c. 11

L.C. 1991, ch. 11

Current to February 15, 2018

À jour au 15 février 2018

Last amended on December 16, 2014

Dernière modification le 16 décembre 2014

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## OFFICIAL STATUS OF CONSOLIDATIONS

Subsections 31(1) and (2) of the *Legislation Revision and Consolidation Act*, in force on June 1, 2009, provide as follows:

### Published consolidation is evidence

**31 (1)** Every copy of a consolidated statute or consolidated regulation published by the Minister under this Act in either print or electronic form is evidence of that statute or regulation and of its contents and every copy purporting to be published by the Minister is deemed to be so published, unless the contrary is shown.

### Inconsistencies in Acts

**(2)** In the event of an inconsistency between a consolidated statute published by the Minister under this Act and the original statute or a subsequent amendment as certified by the Clerk of the Parliaments under the *Publication of Statutes Act*, the original statute or amendment prevails to the extent of the inconsistency.

## NOTE

This consolidation is current to February 15, 2018. The last amendments came into force on December 16, 2014. Any amendments that were not in force as of February 15, 2018 are set out at the end of this document under the heading "Amendments Not in Force".

## CARACTÈRE OFFICIEL DES CODIFICATIONS

Les paragraphes 31(1) et (2) de la *Loi sur la révision et la codification des textes législatifs*, en vigueur le 1<sup>er</sup> juin 2009, prévoient ce qui suit :

### Codifications comme élément de preuve

**31 (1)** Tout exemplaire d'une loi codifiée ou d'un règlement codifié, publié par le ministre en vertu de la présente loi sur support papier ou sur support électronique, fait foi de cette loi ou de ce règlement et de son contenu. Tout exemplaire donné comme publié par le ministre est réputé avoir été ainsi publié, sauf preuve contraire.

### Incompatibilité – lois

**(2)** Les dispositions de la loi d'origine avec ses modifications subséquentes par le greffier des Parlements en vertu de la *Loi sur la publication des lois* l'emportent sur les dispositions incompatibles de la loi codifiée publiée par le ministre en vertu de la présente loi.

## NOTE

Cette codification est à jour au 15 février 2018. Les dernières modifications sont entrées en vigueur le 16 décembre 2014. Toutes modifications qui n'étaient pas en vigueur au 15 février 2018 sont énoncées à la fin de ce document sous le titre « Modifications non en vigueur ».

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**PARTIE IV**

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Entrée en vigueur

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**ANNEXE**

### Meaning of *other means of telecommunication*

(2) For the purposes of this Act, ***other means of telecommunication*** means any wire, cable, radio, optical or other electromagnetic system, or any similar technical system.

### Interpretation

(3) This Act shall be construed and applied in a manner that is consistent with the freedom of expression and journalistic, creative and programming independence enjoyed by broadcasting undertakings.

1991, c. 11, s. 2; 1993, c. 38, s. 81; 1995, c. 11, s. 43.

## Broadcasting Policy for Canada

### Declaration

**3 (1)** It is hereby declared as the broadcasting policy for Canada that

(a) the Canadian broadcasting system shall be effectively owned and controlled by Canadians;

(b) the Canadian broadcasting system, operating primarily in the English and French languages and comprising public, private and community elements, makes use of radio frequencies that are public property and provides, through its programming, a public service essential to the maintenance and enhancement of national identity and cultural sovereignty;

(c) English and French language broadcasting, while sharing common aspects, operate under different conditions and may have different requirements;

(d) the Canadian broadcasting system should

(i) serve to safeguard, enrich and strengthen the cultural, political, social and economic fabric of Canada,

(ii) encourage the development of Canadian expression by providing a wide range of programming that reflects Canadian attitudes, opinions, ideas, values and artistic creativity, by displaying Canadian talent in entertainment programming and by offering information and analysis concerning Canada and other countries from a Canadian point of view,

(iii) through its programming and the employment opportunities arising out of its operations, serve the needs and interests, and reflect the circumstances and aspirations, of Canadian men, women and children, including equal rights, the linguistic duality

### Moyen de télécommunication

(2) Pour l'application de la présente loi, sont inclus dans les moyens de télécommunication les systèmes électromagnétiques — notamment les fils, les câbles et les systèmes radio ou optiques —, ainsi que les autres procédés techniques semblables.

### Interprétation

(3) L'interprétation et l'application de la présente loi doivent se faire de manière compatible avec la liberté d'expression et l'indépendance, en matière de journalisme, de création et de programmation, dont jouissent les entreprises de radiodiffusion.

1991, ch. 11, art. 2; 1993, ch. 38, art. 81; 1995, ch. 11, art. 43.

## Politique canadienne de radiodiffusion

### Politique canadienne de radiodiffusion

**3 (1)** Il est déclaré que, dans le cadre de la politique canadienne de radiodiffusion :

a) le système canadien de radiodiffusion doit être, effectivement, la propriété des Canadiens et sous leur contrôle;

b) le système canadien de radiodiffusion, composé d'éléments publics, privés et communautaires, utilise des fréquences qui sont du domaine public et offre, par sa programmation essentiellement en français et en anglais, un service public essentiel pour le maintien et la valorisation de l'identité nationale et de la souveraineté culturelle;

c) les radiodiffusions de langues française et anglaise, malgré certains points communs, diffèrent quant à leurs conditions d'exploitation et, éventuellement, quant à leurs besoins;

d) le système canadien de radiodiffusion devrait :

(i) servir à sauvegarder, enrichir et renforcer la structure culturelle, politique, sociale et économique du Canada,

(ii) favoriser l'épanouissement de l'expression canadienne en proposant une très large programmation qui traduise des attitudes, des opinions, des idées, des valeurs et une créativité artistique canadiennes, qui mette en valeur des divertissements faisant appel à des artistes canadiens et qui fournisse de l'information et de l'analyse concernant le Canada et l'étranger considérés d'un point de vue canadien,

and multicultural and multiracial nature of Canadian society and the special place of aboriginal peoples within that society, and

(iv) be readily adaptable to scientific and technological change;

(e) each element of the Canadian broadcasting system shall contribute in an appropriate manner to the creation and presentation of Canadian programming;

(f) each broadcasting undertaking shall make maximum use, and in no case less than predominant use, of Canadian creative and other resources in the creation and presentation of programming, unless the nature of the service provided by the undertaking, such as specialized content or format or the use of languages other than French and English, renders that use impracticable, in which case the undertaking shall make the greatest practicable use of those resources;

(g) the programming originated by broadcasting undertakings should be of high standard;

(h) all persons who are licensed to carry on broadcasting undertakings have a responsibility for the programs they broadcast;

(i) the programming provided by the Canadian broadcasting system should

(i) be varied and comprehensive, providing a balance of information, enlightenment and entertainment for men, women and children of all ages, interests and tastes,

(ii) be drawn from local, regional, national and international sources,

(iii) include educational and community programs,

(iv) provide a reasonable opportunity for the public to be exposed to the expression of differing views on matters of public concern, and

(v) include a significant contribution from the Canadian independent production sector;

(j) educational programming, particularly where provided through the facilities of an independent educational authority, is an integral part of the Canadian broadcasting system;

(k) a range of broadcasting services in English and in French shall be extended to all Canadians as resources become available;

(iii) par sa programmation et par les chances que son fonctionnement offre en matière d'emploi, répondre aux besoins et aux intérêts, et refléter la condition et les aspirations, des hommes, des femmes et des enfants canadiens, notamment l'égalité sur le plan des droits, la dualité linguistique et le caractère multiculturel et multiracial de la société canadienne ainsi que la place particulière qu'y occupent les peuples autochtones,

(iv) demeurer aisément adaptable aux progrès scientifiques et techniques;

e) tous les éléments du système doivent contribuer, de la manière qui convient, à la création et la présentation d'une programmation canadienne;

f) toutes les entreprises de radiodiffusion sont tenues de faire appel au maximum, et dans tous les cas au moins de manière prédominante, aux ressources — créatrices et autres — canadiennes pour la création et la présentation de leur programmation à moins qu'une telle pratique ne s'avère difficilement réalisable en raison de la nature du service — notamment, son contenu ou format spécialisé ou l'utilisation qui y est faite de langues autres que le français ou l'anglais — qu'elles fournissent, auquel cas elles devront faire appel aux ressources en question dans toute la mesure du possible;

g) la programmation offerte par les entreprises de radiodiffusion devrait être de haute qualité;

h) les titulaires de licences d'exploitation d'entreprises de radiodiffusion assument la responsabilité de leurs émissions;

i) la programmation offerte par le système canadien de radiodiffusion devrait à la fois :

(i) être variée et aussi large que possible en offrant à l'intention des hommes, femmes et enfants de tous âges, intérêts et goûts une programmation équilibrée qui renseigne, éclaire et divertit,

(ii) puiser aux sources locales, régionales, nationales et internationales,

(iii) renfermer des émissions éducatives et communautaires,

(iv) dans la mesure du possible, offrir au public l'occasion de prendre connaissance d'opinions divergentes sur des sujets qui l'intéressent,

(v) faire appel de façon notable aux producteurs canadiens indépendants;

**(l)** the Canadian Broadcasting Corporation, as the national public broadcaster, should provide radio and television services incorporating a wide range of programming that informs, enlightens and entertains;

**(m)** the programming provided by the Corporation should

- (i)** be predominantly and distinctively Canadian,
- (ii)** reflect Canada and its regions to national and regional audiences, while serving the special needs of those regions,
- (iii)** actively contribute to the flow and exchange of cultural expression,
- (iv)** be in English and in French, reflecting the different needs and circumstances of each official language community, including the particular needs and circumstances of English and French linguistic minorities,
- (v)** strive to be of equivalent quality in English and in French,
- (vi)** contribute to shared national consciousness and identity,
- (vii)** be made available throughout Canada by the most appropriate and efficient means and as resources become available for the purpose, and
- (viii)** reflect the multicultural and multiracial nature of Canada;

**(n)** where any conflict arises between the objectives of the Corporation set out in paragraphs (l) and (m) and the interests of any other broadcasting undertaking of the Canadian broadcasting system, it shall be resolved in the public interest, and where the public interest would be equally served by resolving the conflict in favour of either, it shall be resolved in favour of the objectives set out in paragraphs (l) and (m);

**(o)** programming that reflects the aboriginal cultures of Canada should be provided within the Canadian broadcasting system as resources become available for the purpose;

**(p)** programming accessible by disabled persons should be provided within the Canadian broadcasting system as resources become available for the purpose;

**(q)** without limiting any obligation of a broadcasting undertaking to provide the programming contemplated by paragraph (i), alternative television

**j)** la programmation éducative, notamment celle qui est fournie au moyen d'installations d'un organisme éducatif indépendant, fait partie intégrante du système canadien de radiodiffusion;

**k)** une gamme de services de radiodiffusion en français et en anglais doit être progressivement offerte à tous les Canadiens, au fur et à mesure de la disponibilité des moyens;

**l)** la Société Radio-Canada, à titre de radiodiffuseur public national, devrait offrir des services de radio et de télévision qui comportent une très large programmation qui renseigne, éclaire et divertit;

**m)** la programmation de la Société devrait à la fois :

- (i)** être principalement et typiquement canadienne,
- (ii)** refléter la globalité canadienne et rendre compte de la diversité régionale du pays, tant au plan national qu'au niveau régional, tout en répondant aux besoins particuliers des régions,
- (iii)** contribuer activement à l'expression culturelle et à l'échange des diverses formes qu'elle peut prendre,
- (iv)** être offerte en français et en anglais, de manière à refléter la situation et les besoins particuliers des deux collectivités de langue officielle, y compris ceux des minorités de l'une ou l'autre langue,
- (v)** chercher à être de qualité équivalente en français et en anglais,
- (vi)** contribuer au partage d'une conscience et d'une identité nationales,
- (vii)** être offerte partout au Canada de la manière la plus adéquate et efficace, au fur et à mesure de la disponibilité des moyens,
- (viii)** refléter le caractère multiculturel et multiracial du Canada;

**n)** les conflits entre les objectifs de la Société énumérés aux alinéas l) et m) et les intérêts de toute autre entreprise de radiodiffusion du système canadien de radiodiffusion doivent être résolus dans le sens de l'intérêt public ou, si l'intérêt public est également assuré, en faveur des objectifs énumérés aux alinéas l) et m);

programming services in English and in French should be provided where necessary to ensure that the full range of programming contemplated by that paragraph is made available through the Canadian broadcasting system;

**(r)** the programming provided by alternative television programming services should

**(i)** be innovative and be complementary to the programming provided for mass audiences,

**(ii)** cater to tastes and interests not adequately provided for by the programming provided for mass audiences, and include programming devoted to culture and the arts,

**(iii)** reflect Canada's regions and multicultural nature,

**(iv)** as far as possible, be acquired rather than produced by those services, and

**(v)** be made available throughout Canada by the most cost-efficient means;

**(s)** private networks and programming undertakings should, to an extent consistent with the financial and other resources available to them,

**(i)** contribute significantly to the creation and presentation of Canadian programming, and

**(ii)** be responsive to the evolving demands of the public; and

**(t)** distribution undertakings

**(i)** should give priority to the carriage of Canadian programming services and, in particular, to the carriage of local Canadian stations,

**(ii)** should provide efficient delivery of programming at affordable rates, using the most effective technologies available at reasonable cost,

**(iii)** should, where programming services are supplied to them by broadcasting undertakings pursuant to contractual arrangements, provide reasonable terms for the carriage, packaging and retailing of those programming services, and

**(iv)** may, where the Commission considers it appropriate, originate programming, including local programming, on such terms as are conducive to the achievement of the objectives of the broadcasting policy set out in this subsection, and in

**o)** le système canadien de radiodiffusion devrait offrir une programmation qui reflète les cultures autochtones du Canada, au fur et à mesure de la disponibilité des moyens;

**p)** le système devrait offrir une programmation adaptée aux besoins des personnes atteintes d'une déficience, au fur et à mesure de la disponibilité des moyens;

**q)** sans qu'il soit porté atteinte à l'obligation qu'ont les entreprises de radiodiffusion de fournir la programmation visée à l'alinéa i), des services de programmation télévisée complémentaires, en anglais et en français, devraient au besoin être offerts afin que le système canadien de radiodiffusion puisse se conformer à cet alinéa;

**r)** la programmation offerte par ces services devrait à la fois :

**(i)** être innovatrice et compléter celle qui est offerte au grand public,

**(ii)** répondre aux intérêts et goûts de ceux que la programmation offerte au grand public laisse insatisfaits et comprendre des émissions consacrées aux arts et à la culture,

**(iii)** refléter le caractère multiculturel du Canada et rendre compte de sa diversité régionale,

**(iv)** comporter, autant que possible, des acquisitions plutôt que des productions propres,

**(v)** être offerte partout au Canada de la manière la plus rentable, compte tenu de la qualité;

**s)** les réseaux et les entreprises de programmation privés devraient, dans la mesure où leurs ressources financières et autres le leur permettent, contribuer de façon notable à la création et à la présentation d'une programmation canadienne tout en demeurant réceptifs à l'évolution de la demande du public;

**t)** les entreprises de distribution :

**(i)** devraient donner priorité à la fourniture des services de programmation canadienne, et ce en particulier par les stations locales canadiennes,

**(ii)** devraient assurer efficacement, à l'aide des techniques les plus efficaces, la fourniture de la programmation à des tarifs abordables,

**(iii)** devraient offrir des conditions acceptables relativement à la fourniture, la combinaison et la

particular provide access for underserved linguistic and cultural minority communities.

#### Further declaration

**(2)** It is further declared that the Canadian broadcasting system constitutes a single system and that the objectives of the broadcasting policy set out in subsection (1) can best be achieved by providing for the regulation and supervision of the Canadian broadcasting system by a single independent public authority.

### Application

#### Binding on Her Majesty

**4 (1)** This Act is binding on Her Majesty in right of Canada or a province.

#### Application generally

**(2)** This Act applies in respect of broadcasting undertakings carried on in whole or in part within Canada or on board

- (a)** any ship, vessel or aircraft that is
  - (i)** registered or licensed under an Act of Parliament, or
  - (ii)** owned by, or under the direction or control of, Her Majesty in right of Canada or a province;
- (b)** any spacecraft that is under the direction or control of
  - (i)** Her Majesty in right of Canada or a province,
  - (ii)** a citizen or resident of Canada, or
  - (iii)** a corporation incorporated or resident in Canada; or
- (c)** any platform, rig, structure or formation that is affixed or attached to land situated in the continental shelf of Canada.

vente des services de programmation qui leur sont fournis, aux termes d'un contrat, par les entreprises de radiodiffusion,

**(iv)** peuvent, si le Conseil le juge opportun, créer une programmation — locale ou autre — de nature à favoriser la réalisation des objectifs de la politique canadienne de radiodiffusion, et en particulier à permettre aux minorités linguistiques et culturelles mal desservies d'avoir accès aux services de radiodiffusion.

#### Déclaration

**(2)** Il est déclaré en outre que le système canadien de radiodiffusion constitue un système unique et que la meilleure façon d'atteindre les objectifs de la politique canadienne de radiodiffusion consiste à confier la réglementation et la surveillance du système canadien de radiodiffusion à un seul organisme public autonome.

### Application

#### Obligation de Sa Majesté

**4 (1)** La présente loi lie Sa Majesté du chef du Canada ou d'une province.

#### Application

**(2)** La présente loi s'applique aux entreprises de radiodiffusion exploitées — même en partie — au Canada ou à bord :

- a)** d'un navire, bâtiment ou aéronef soit immatriculé ou bénéficiant d'un permis délivré aux termes d'une loi fédérale, soit appartenant à Sa Majesté du chef du Canada ou d'une province, ou relevant de sa compétence ou de son autorité;
- b)** d'un véhicule spatial relevant de la compétence ou de l'autorité de Sa Majesté du chef du Canada ou d'une province, ou de celle d'un citoyen canadien, d'un résident du Canada ou d'une personne morale constituée ou résidant au Canada;
- c)** d'une plate-forme, installation, construction ou formation fixée au plateau continental du Canada.

**CBC Celebrating Canadian Culture:**  
*Annual Report 2016-17*

## ACCOUNTABILITY PLAN

# OUR PERFORMANCE - MEDIA LINES

## ENGLISH SERVICES HIGHLIGHTS

We use Media Lines reporting to measure performance against our operational targets, which mostly focus on audience reach and share through our various platforms and self-generated revenue across all our services.

In 2016-2017, we continued our strategy to transform and modernize the role of the public broadcaster: investing in distinctly Canadian content, deepening our connection with the communities we serve and building on our strong digital focus all while ensuring our financial sustainability.

## UNIQUE AND DISTINCTIVE CANADIAN PROGRAMMING

**Almost one in three Canadians tuned into The Tragically Hip concert in August 2016.**

CBC Television introduced a slate of new programs that were both popular with audiences and received critical acclaim: *Kim's Convenience*, *Pure*, *Workin' Moms*, *Baroness Von Sketch*, *Secret Path*, *This is High School*, *Keeping Canada Safe* and *Anne* – all high-calibre productions and authentic Canadian storytelling.

It was another big year for multi-platform signature event programming with the Rio 2016 Olympics becoming the most-watched Summer Olympic Games in Canadian history and the unforgettable *The Tragically Hip: A National Celebration*, which was watched by more than 11.7 million Canadians on television, online or at community screenings across the country.<sup>9</sup> Other notable events include our New Year's Eve 2017 celebrations, Canada Reads, the Scotiabank Giller Prize, the Canadian Country Music Awards, the Canadian Screen Awards and programming around Canada's 150th anniversary, including a new collaboration with Radio-Canada to launch the web portal for Canada 2017, which began this year and will continue through July 2017.

We continued to showcase under-represented voices and talent, with women now directing 50% of our top scripted programs. We also furthered our commitment to diversity by introducing the [Breaking Barriers Film Fund](#), which supports the production of feature films by women, Indigenous peoples, persons with disabilities and visible minorities. Three films have already been selected: *Meditation Park*, written by Mina Shum, *Angelique's Isle*, written by Michelle Derosier, and *Octavio Is Dead!*, written by Sook-Yin Lee.

CBC Radio refreshed the CBC Radio One schedule with new shows and reduced repeats with the addition of new original summer programming. CBC Music began re-investing in live musical performances, showcased Canada's music talent at the CBC Music Festival, conducted the national talent search CBC Music Searchlight, and engaged listeners with the Canadian Music Class Challenge, JUNOfest and the Polaris Music Prize. *q* was relaunched this year, with new host Tom Power and a renewed focus on music.

By purposefully building diversity and inclusion into all programs, we are enhancing our reflection of the diversity of Canada, especially through shows like *Unreserved*, *Out in the Open* and *Marvin's Room*.

CBC News provided leading coverage of key Canadian news events, from the Fort McMurray wildfires to regional elections in Saskatchewan, Manitoba and the Yukon. New international pocket bureaus were opened in Moscow and Istanbul, allowing us to cover important international stories from a uniquely Canadian perspective. In our news programming, we achieved greater breadth and originality in content, including on broadcast, original-to-digital and interactive platforms (e.g. *Face to Face with the Prime Minister*). To further this evolution, CBC News will be re-organized around what matters most – the stories we tell and the audience we serve – with four pillars built around: daily news, investigative journalism, audience engagement, and depth, context and analysis.

## DIGITAL AND MULTIPLATFORM

### Digital creates momentum.

**This year, we launched the CBC video player and original digital series like *The Amazing Gayl Pile*.**

On our digital platforms, we focused on improving loyalty and retention through our content offer and engaging user experiences. We introduced a new Arts Feed and relaunched our Comedy Feed to add to our existing Lifestyle Feed and documentaries, as well as a new digital video player with more long-form TV experiences. Original digital series like *The Amazing Gayl Pile* and *My 90-Year-Old Roommate* have developed large online followings.

New original podcasts helped us maintain our leadership in original audio content, with the popular *Someone Knows Something* podcast peaking at 21 million downloads. In all, CBC Radio hit 145 million podcast downloads last year, and select CBC Radio One and CBC Radio Two stations launched as streams on the new Radioplayer Canada app, extending the availability of our audio services.

CBC Radio also debuted *Highway of Tears*, CBC's first virtual reality (VR) documentary on Missing and Murdered Indigenous Women, which combined emerging technology with CBC's strong journalism and community town hall events to create a first-of-its-kind VR exploration of a compelling and important story.

Finally, CBC Music continues to innovate in its digital music functionality and personalization, making it a sought-after place of discovery for Canadian music content

online. In collaboration with Radio-Canada, we also launched an integrated back-end music platform, which allowed us to expand the service to be a richer and more fully functional experience.

## LOCAL

CBC continued to implement our local, digital-first programming strategy and to reinvest in local services where we now offer local news online, seven days a week, including programming tailored to different parts of the day. As a result, we're seeing growth in digital consumption of local programming and content.

Finally, we announced a new London (Ontario) radio and digital station that recently opened and became the home for Southwestern Ontario's afternoon drive radio show.

## ENGLISH SERVICES 2016-2017 RESULTS

INDICATORS	MEASUREMENTS	RESULTS 2015-2016	TARGETS 2016-2017	RESULTS 2016-2017	PERFORMANCE AGAINST TARGET	TARGETS 2017-2018
<b>Radio</b>						
CBC Radio One and CBC Radio 2	All-day audience share <sup>2</sup>	18.5%	18.7%	N/A <sup>3</sup>	N/A <sup>3</sup>	N/A <sup>3</sup>
<b>Radio - new indicators starting 2017-2018</b>						
CBC Radio One and CBC Radio 2 5-PPM Market share	All-day audience share in the 5-PPM Markets <sup>4</sup>	-	-	-	-	11.1%
CBC Radio One National Reach	Monthly Average National Reach <sup>5</sup>	-	-	-	-	7.7 M
CBC Radio 2 National Reach	Monthly Average National Reach <sup>5</sup>	-	-	-	-	4.5 M
<b>Television</b>						
CBC Television	Prime-time audience share <sup>5</sup>	5.8%	6.0%	5.5%		5.8%
CBC News Network	All-day audience share <sup>5</sup>	1.7%	1.5%	1.6%		1.5%
<b>Regional</b>						
CBC Radio One	Morning show audience share <sup>2</sup>	20.4%	20.4%	N/A <sup>3</sup>	N/A <sup>3</sup>	N/A <sup>3</sup>
TV local 6 PM news	Average minute audience <sup>5</sup>	345 K	345 K	313 K		335 K
CBC.ca regional offering	Monthly average unique visitors <sup>6</sup>	4.3 M <sup>7</sup>	10.1 M	10.6 M		10.8 M
<b>Regional - new indicators starting 2017-2018</b>						
CBC Radio One 5-PPM Market share	Morning show audience share in the 5-PPM Markets <sup>4</sup>	-	-	-	-	14.5%
CBC Radio One National Reach	Morning show audience, Monthly Average National Reach <sup>5</sup>	-	-	-	-	3.5 M
<b>Digital</b>						
CBC digital offering	Monthly average unique visitors <sup>8</sup>	12.4 M	14.1 M	14.8 M		16.3 M
<b>Specialty Television Channels</b>						
CBC News Network	Subscribers	11.0 M	N/A <sup>9</sup>	N/A <sup>9</sup>	N/A <sup>9</sup>	N/A <sup>9</sup>
documentary	Subscribers	2.5 M	N/A <sup>9</sup>	N/A <sup>9</sup>	N/A <sup>9</sup>	N/A <sup>9</sup>
<b>Revenue<sup>10</sup></b>						
Conventional, specialty, online		\$260 M	\$211 M	\$228 M		\$303 M

N/A = not applicable or not available

 Target met or exceeded     Target partially met     Target not met

*Our performance metrics are evolving as the media industry continues to undergo a digital transformation. Canadians consume media content on multiple devices (e.g. smartphones, tablets, smart TVs) from an ever growing array of content providers. As media consumption habits change, audience measurement suppliers and the Corporation are refining methodologies and introducing new measurement technologies to ensure the accuracy and completeness of data gathered. Since some of these data are used to measure our strategic and operational performance, we may be required to make adjustments to targets and historical results to enhance comparability of the data.*

**CBC Television** – CBC TV audience share ended the year below target due to weaker programming performance in the fall (especially in the early weeks when Sports and News audiences were particularly high) and the December holiday period. There was an upward trend in share performance this winter, driven by success of new and returning series including *Pure*, *Schitt's Creek*, *Murdoch Mysteries* and *Anne*.

**CBC News Network (CBCNN)** – It was a strong year for CBC News Network, with results exceeding target, largely due to high-profile events of national and international interest such as the coverage of the Fort McMurray wildfire in spring 2016 and the US Presidential election.

**Regional: TV supper news** – Audience levels for the TV local 6pm news were just below target and lower than last year's results.

**Regional digital content** – Favourable results in digital regional content when compared to target and prior year's results reflected the success of our new local digital-first strategy, including comprehensive local news output and programming tailored to specific parts of the day.

**Digital** – We saw a strong performance on the digital front with the number of monthly average unique visitors continuing to outperform prior year's results and target, and with much of the success attributed to new digital content and resource enhancements enabling a new online video player, a new CBCMusic.ca site and app, and a new live and on-demand audio service.

**Revenue** – Results exceeded target due to strong digital advertising and subscriber revenue.

<sup>1</sup> Source: Numeris, Portable People Meter (PPM), persons aged two years and older.

<sup>2</sup> Source: Numeris, fall survey (diary), persons aged 12 years and older. Morning show: Monday-Friday, 6:00-8:30 AM.

<sup>3</sup> In Fall 2016, Numeris introduced a change in its survey methodology by offering respondents the option to report their radio listening hours with an online diary instead of a traditional paper diary. Numeris recognizes that this methodological enhancement has significantly affected results in the Anglophone markets. Therefore, results for 2016-2017 are not comparable to our targets or prior year figures. As a result of this methodology change, this measure is being replaced by new indicators that use the Numeris Portable People Meter (PPM). Targets for 2017-2018 using these new indicators are included above.

<sup>(4)</sup> Source: Numeris, Portable People Meter (PPM), persons aged two years and older, in the Toronto, Vancouver, Calgary, Edmonton and Montreal-Anglophone markets. Local Morning Shows Monday-Friday 6:00-8:30am.

<sup>(5)</sup> Source: Numeris, Portable People Meter (PPM), persons aged two years and older.

<sup>(6)</sup> Source: comScore Media Metrix, unique visitors, desktops (aged two years and older) and mobile devices (aged 18 years and older), April to March. In 2015-2016, the CBC.ca regional offering measure was desktop only.

<sup>(7)</sup> In 2015-2016, the CBC.ca regional offering measure was desktop only.

<sup>(8)</sup> Source: comScore Media Metrix, unique visitors, desktops (aged two years and older) and mobile devices (aged 18 years and older), April to March.

<sup>(9)</sup> Not published due to competitive reasons.

<sup>(10)</sup> Includes advertising revenue, subscription revenue and other revenue (e.g. content distribution). Excludes revenue from arrangements with Rogers Communications Inc. for the continued airing of Hockey Night in Canada for Saturday night and playoff hockey. Toronto 2015 Pan Am Games revenue included in prior year results reflects joint English and French Services revenue. As of 2017-2018, revenue will include the Olympics.



# Holiday Season Survey

**Book Buyer Survey  
January 2018**

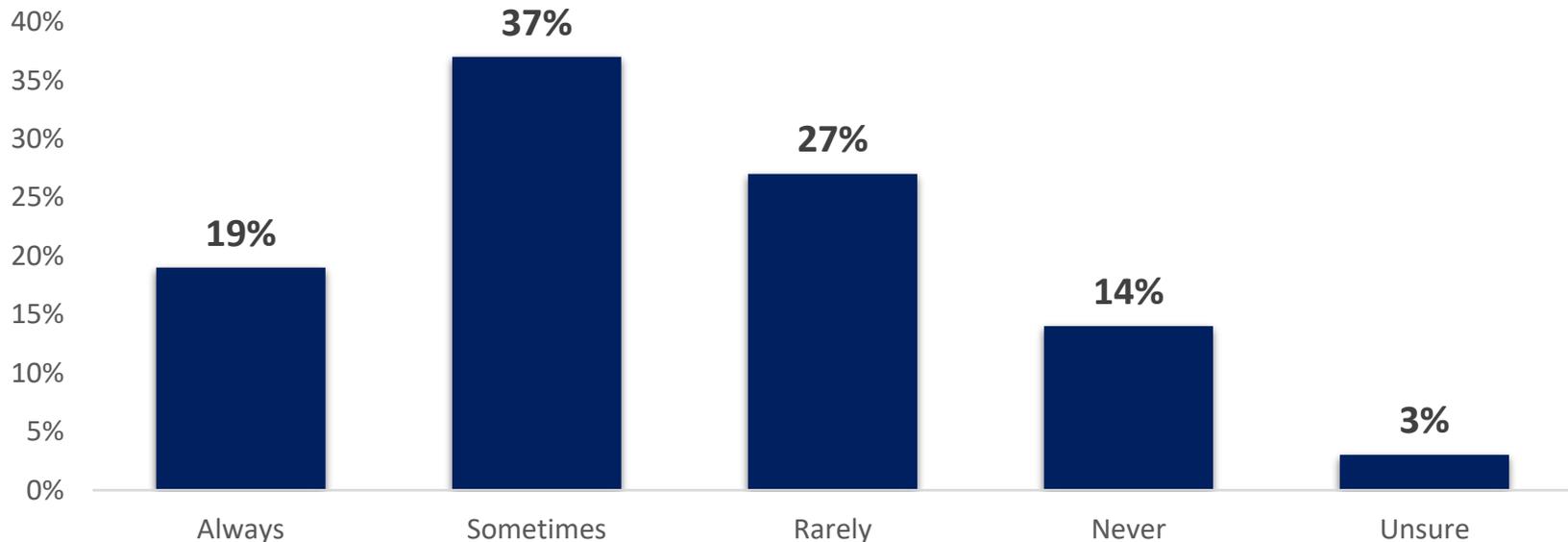


## Over half of book-buyers say they browse the local section at *least sometimes* when visiting a bookstore or book-sellers website.

Consumers over 65 are almost twice as likely to visit the local section as those under 35 (28% vs 15%). Atlantic Canadians who visit the local section are significantly more likely to say they saw the “Book Lover’s Holiday Gift Ideas” catalogue or “Atlantic Books Today”. Those who visit the local section are also more likely to read newspapers, listen to CBC radio, tune in to ATV Evening News and/or watch CBC Television.



*Whenever you visit a book store or website to look for books, how often do you look for books published in your home province or in Atlantic Canada?*

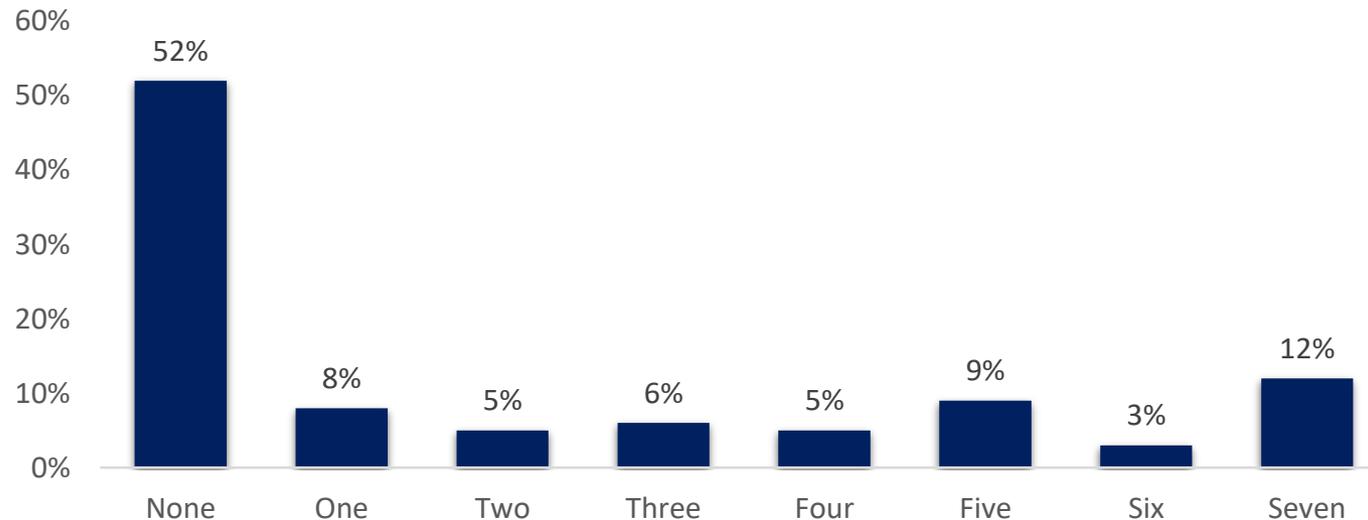


## Half of book buyers listen to CBC radio at least one day a week.

Those who listen to CBC do so on average 4.2 days per week and one in ten (12%) consumers listen every day. The popularity of CBC is consistent across all four Atlantic provinces but does vary by demographics as detailed on the next page.



*Approximately, how many week-days do you: Listen to CBC radio?*

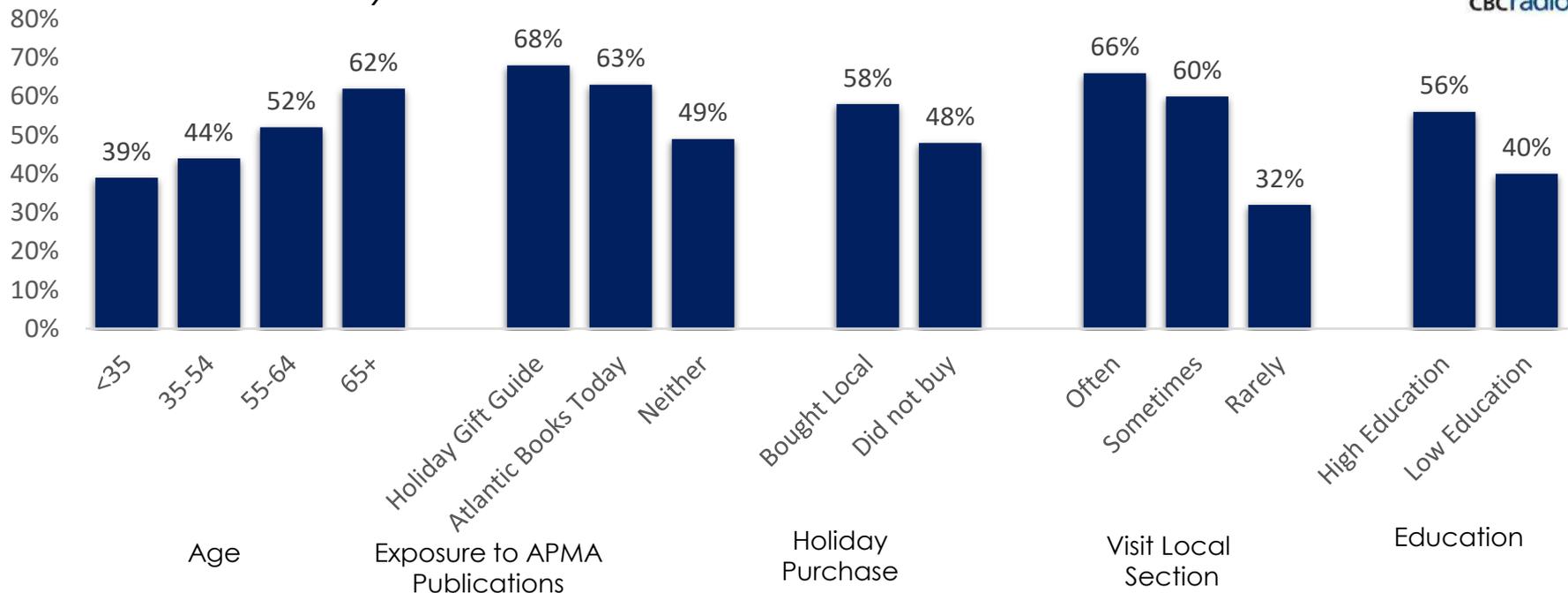


# The appeal of CBC radio varies by age and education and is correlated to seeing APMA publications and interest in books published in Atlantic Canada.

Consumers over 65 are the most likely to listen to CBC (62%) while those under 35 are the least (39%). There is a strong correlation between listening to CBC and frequenting the local section of a book store and purchasing books published locally. While CBC has nothing to do with the distribution of the “Book Lover’s Holiday Gift Ideas” catalogue and ABT, CBC listeners were more likely to report having seen both publications.



**?** *Approximately, how many days per week do you? - Listen to CBC radio? % Listen at least one day a week*



# Canadians Reading Winners: Are book buyers influenced by literary awards?



# Introduction

In the fall of 2013, BookNet Canada embarked on an initiative to determine how literary awards impact book-buying behaviour in Canada. As part of our continued research into Canadian book-buying behaviour<sup>1</sup>, we conducted an online survey to collect data from a representative Canadian panel. Respondents were English-speaking residents of Canada, aged 18 years or older, who had purchased a minimum of one book, regardless of format, in the prior month. The panel included participants from all regions of Canada.

**20%** of  
respondents bought  
a winning or  
nominated book in  
the prior month

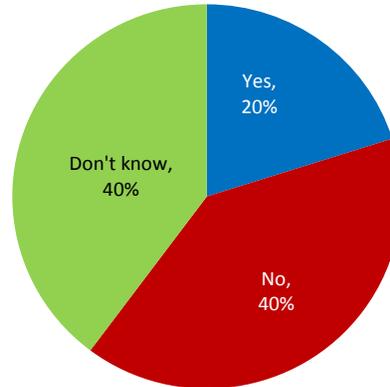
In addition, BookNet conducts research every awards season using our SalesData system, which tracks 85% of English-language print book sales in Canada. To get a sense of what to expect during the award season, and to help nominees with stock and demand planning, we create a trend analysis of the previous year's shortlist and winner, as well as a comparison in sales and stock position of the winners year-over-year.

The awards that BookNet Canada studies all have fairly consistent trends. There is a small increase in sales immediately following the shortlist announcement for every nominated title. Then sales for all nominees continue to increase after the winner is announced, but the winning title (usually) outsells the shortlisted titles. We find that cross-promotion of two nominated titles can have a mutually beneficial impact on the sales for both titles. Crossover in shortlists may also have a positive impact—titles nominated for multiple awards often see a larger bump in sales.

With this survey being conducted during the peak of literary award season, one of its most poignant findings pertains to the number of book buyers who were unsure if they had purchased a nominated or winning book. Corresponding to this, we found that many respondents did not know what constituted a literary award, some mistaking *The New York Times* bestseller list for an award.

<sup>1</sup> For more information on BookNet Canada's consumer research, please visit [www.booknetcanada.ca/consumer-studies](http://www.booknetcanada.ca/consumer-studies)

**HAVE YOU RECENTLY PURCHASED A BOOK THAT HAD A NOMINATION  
OR WON A LITERARY AWARD?**



Question: Have you recently purchased a book that had a nomination or won a literary award?  
(Scotiabank Giller, Canada Reads, etc.) (N=400)

The fact that 40% of respondents did not know if they had purchased a nominated or award-winning book in the past month indicates that there may be issues with discoverability or awareness. If you are a reader and don't know anything about literary awards, where do you go for that information?

# How Literary Awards Influence Book Buyers

BookNet Canada took a look at whether literary awards are important to book buyers. It is important to emphasize that the focus of this work is not to review literary awards, as we know that they all recognize different kinds of titles, provide benefit to writers, and shed light on great pieces of literature, but rather to assess consumers' awareness of award-winning or nominated content.

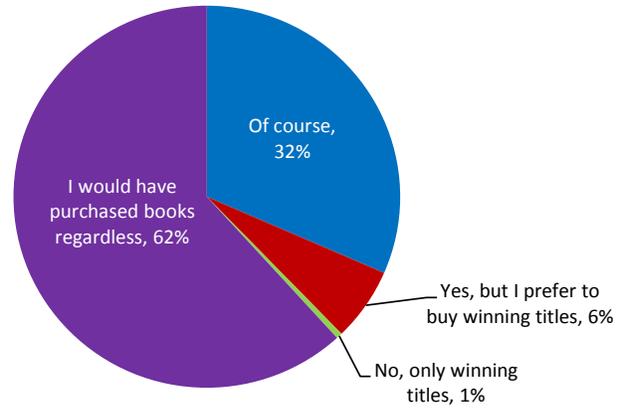
**62%** of book buyers tend to make their purchase regardless of an award win or nomination

We asked the 20% of respondents who reported buying a nominated or winning title how much of a factor the award win or nomination played in their decision to purchase that book. It was a selling feature but not the main reason for purchase for 44% of respondents, while only 21% said that it was the main reason.

The remaining 35% would have purchased the book regardless of any award nomination or win. When we looked at some of the comments that consumers made regarding their purchase motivation, many people attributed their book-buying behaviour to subject, author, and personal recommendations over literary award wins or nominations.

The graph below looks at the level of importance book buyers place on winning titles compared to nominated titles. Perhaps somewhat surprisingly from what we know about winning titles outselling their nominated competition, a very small percentage (6%) of respondents reported preferring to purchase winning titles. The largest percentage (62%) responded that they tend to purchase books regardless of a win or a nomination, indicating literary award status may not have as much influence on the consumer as other factors.

**DO YOU (OR WOULD YOU) PURCHASE BOOKS THAT HAVE BEEN NOMINATED FOR AWARDS BUT HAVE NOT WON?**



Question: Do you (or would you) purchase books that have been nominated for awards but have not won? (N=400)

44% of male respondents reported being influenced by award nominations or wins, compared to 39% of female respondents.

# Perceptions of Award-Winning/Nominated Books

When we were looking at who was influenced by literary award status when purchasing books we wondered why some people were influenced and not others. We examined how book buyers perceive literary awards and the books that are nominated or win them. Most comments were positive, with respondents thinking that it was important to acknowledge authors (Canadian authors in particular) and impressive works of literature. One respondent wrote,

*“They’re still new to me. I never used to be into books and neither was my 15-year-old daughter but she has recently inspired me to read more. I saw something on TV about Canada Reads that caught my attention. I hope to learn more about it.”*

There were also respondents who felt negatively about literary award-winning or nominated books. Most of these respondents felt that awards were not as important as the subject of the book and therefore didn’t pay attention to them. However there were others who felt that awards “aren’t always right” or even felt that award-winning titles often cost more.

We also asked respondents, when thinking generally about their book-buying behaviour, how significant award wins or nominations are to their decision to purchase a book. We found that respondents ages 25–34 are the most swayed by a book’s award status, with 47% responding they are “greatly” or “somewhat” impacted by award wins or nominations when deciding to purchase a book. This compares to only 28% of respondents ages 55 and older who were moderately to very impacted.

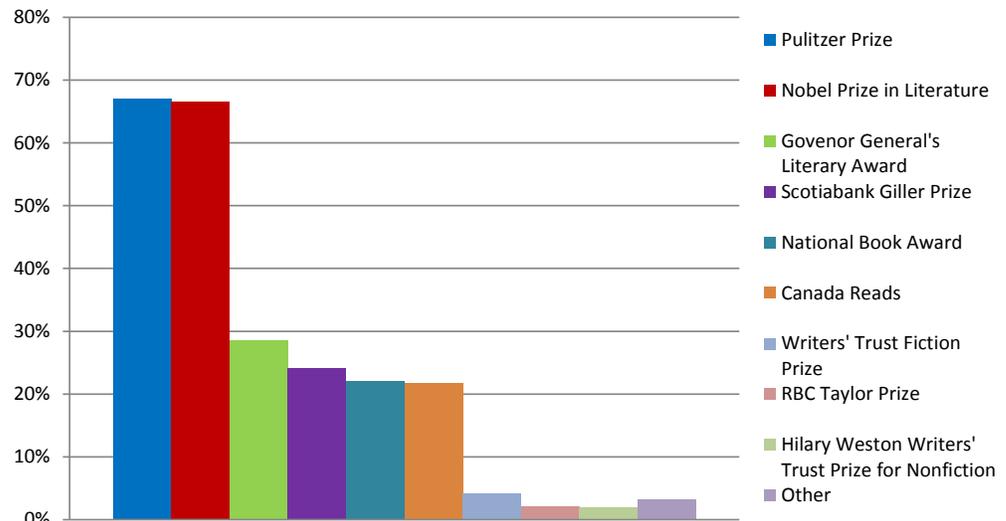
## Discoverability of Award-Winning/Nominated Books

If 40% of book buyers don't know if they have recently purchased a book that was nominated for or won a literary award, where are they finding information on literary awards? Are Canadians aware of our homegrown awards, or are they more familiar with high-profile international awards?

When we conducted our survey, during literary awards season, some book buyers commented that they wanted awards to be advertised more because they “don't know much about them” or “only know of a couple of awards.” One respondent put it best when they said, “I am not sure how or where to follow which books receive which awards.” Happily, of the 40% that did know whether they had recently purchased a book that had a nomination or won a literary award, most praised literary awards as great ways to discover new authors and said that awards could be helpful when choosing titles.

In order to get a better idea of which literary awards book buyers were aware of, we gave them a list of both Canadian awards and international awards. Perhaps unsurprisingly, the international book awards were the most widely known, with 67% of respondents reporting that they had knowledge of them. This is likely due to the media attention for those awards. When we asked respondents who selected “other” as an option to specify, many of them cited the Man Booker Prize. Other respondents were unsure of what constituted a literary award, confusing bestseller lists for awards.

WHICH LITERARY AWARDS ARE YOU MOST AWARE OF?



Question: Which literary awards are you most aware of? (Select up to 3) (N= 400)

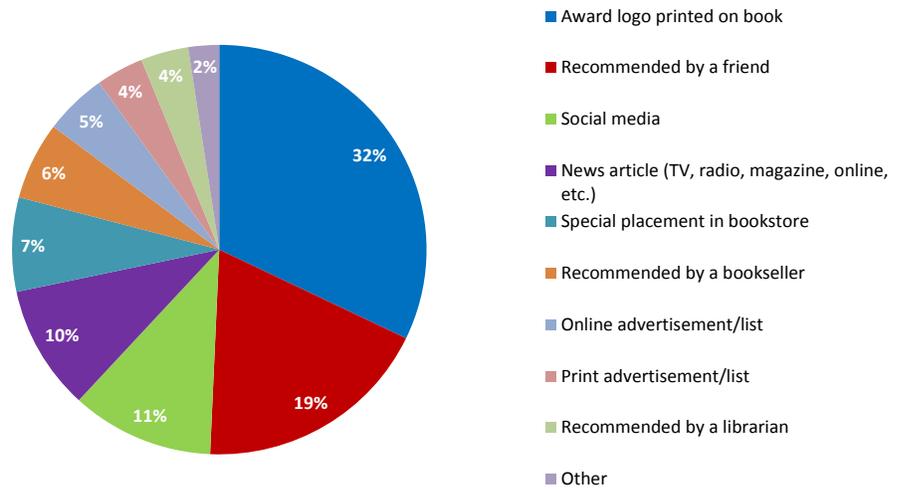
**32%** noticed that a book was an award winner or nominee because of a logo printed on the book

In order to explore discoverability of literary awards, we asked respondents who purchased an award-nominated or winning title when and how they heard about that title. In total we had responses from 81 book buyers, representing 20% of the panel. While this is not an incredibly large number of responses, most demographics are represented equally across those 81 respondents and we feel that the data is representative enough to generalize about some trends and areas of interest.

21% of these respondents heard about the title they purchased during the shortlist period, while 16% heard about it following the award announcement. The remainder of respondents heard about the book they purchased prior to any announcement or cannot remember when they became aware of it. Without checking some of the literary awards' websites it can be difficult for the average book buyer to find out which titles might be nominees or winners.

We followed up by asking these respondents how they noticed that their book was nominated or won a literary award. 32% of respondents reported noticing an award winner or nominee because of a logo printed on the book.

HOW DID YOU NOTICE THAT THIS TITLE WAS NOMINATED OR WON?



Question: How did you notice that this title was nominated or won? (N= 81)

## Conclusion

Literary award–nominated and winning authors, especially the Canadian ones, should be well known to the general book buyer as well as those who work in the book industry. The award to the author should not only come in the form of a prize but also publicize their extraordinary literary work.

In this study, BookNet Canada followed up on SalesData research that is conducted every award season for the nominees. The findings from those studies indicate that while literary award nominations improve sales for everyone, the winner experiences the greatest increase in sales.

While this may be the case, with more awareness of these nominated or award-winning titles, perhaps those sales could increase even more. Researching the impact that literary awards have on sales also found that some awards have more of an impact than others and cross-award nominations can be very beneficial. This may be due to some literary awards having more overt marketing strategies to get the word out about the award itself, or the media taking notice of an award and creating buzz around the books involved. We must also consider that many factors can influence a book’s sales—availability, price, media attention, reviews, competing titles—and it can be difficult to isolate which factors have had an effect when sales increase or decrease.

**MASSEY LECTURE SERIES 2003-2016**

ISBN	Title	Subtitle	Contributor(s)	Publication Date	Format
9781487002428	The Return of History	Conflict, Migration, and Geopolitics in the Twenty-First Century	Welsh, Jennifer	8/19/2017	Paperback / Trade paperback
9781487001308	The Return of History		Welsh, Jennifer	9/17/2016	Hardcover / Trade hardcover
9781487001377	History's People	Personalities and the Past	MacMillan, Margaret	8/6/2016	Paperback / Trade paperback
9781487000059	History's People	Personalities and the Past	MacMillan, Margaret	9/8/2015	Hardcover / Trade hardcover
9781770898370	Belonging	The Paradox of Citizenship	Clarkson, Adrienne	9/19/2014	Paperback / Trade paperback
9781770893221	Blood	The Stuff of Life	Hill, Lawrence	9/28/2013	Paperback / Trade paperback
9780887849749	Winter	Five Windows on the Season	Gopnik, Adam	9/24/2011	Paperback / Trade paperback
9780887849725	Player One		Coupland, Douglas Coupland, Douglas	9/25/2010	Paperback / Trade paperback
9780887848421	The Wayfinders	Why Ancient Wisdom Matters in the Modern World	Davis, Wade	10/1/2009	Paperback / Trade paperback
9780887848018	More Lost Massey Lectures	Recovered Classics from Five Great Thinkers	Brandt, Willy Grant, George Lévi-Strauss, Claude Underhill, Frank H. Ward, Barbara	9/19/2008	Paperback / Trade paperback
9780887848100	Payback	Debt and the Shadow Side of Wealth	Atwood, Margaret	9/15/2008	Paperback / Trade paperback
9780887848063	An Illustrated Short History of Progress		Wright, Ronald	7/7/2008	Paperback / Trade paperback
9780887848094	Becoming Human		Vanier, Jean	7/1/2008	Paperback / Trade paperback
9780887847639	The City of Words		Manguel, Alberto	10/1/2007	Paperback / Trade paperback
9780887842177	The Lost Massey Lectures	Recovered Classics from Five Great Thinkers	Galbraith, John Kenneth Goodman, Paul Jacobs, Jane Kierans, Eric W. King, Martin Luther, Jr.	10/1/2007	Paperback / Trade paperback
9780887847622	The Rights Revolution		Ignatieff, Michael	2/1/2007	Paperback / Trade paperback
9780887842061	An Illustrated Short History of Progress		Wright, Ronald	10/1/2006	Hardcover / Trade hardcover
9780887847479	Ethical Imagination		Somerville, Margaret	10/1/2006	Paperback / Trade paperback
9780887847530	Race Against Time	Searching for Hope in AIDS-Ravaged Africa	Lewis, Stephen	6/1/2006	Paperback / Trade paperback
9780887847318	The Unconscious Civilization		Saul, John Ralston	8/1/2005	Paperback / Trade paperback
9780887847066	Short History of Progress		Wright, Ronald	10/23/2004	Paperback / Trade paperback
9780887846960	The Truth about Stories	A Native Narrative	King, Thomas	11/1/2003	Paperback / Trade paperback

# **Analysis of Government Support for Public Broadcasting and Other Culture in Canada**

**Nordicity**

Prepared for

**CBC|Radio-Canada**

**October 2013**



## About Nordicity

Nordicity ([www.nordicity.com](http://www.nordicity.com)) is a powerful analytical engine with expertise in strategy and business, evaluation and economics, policy and regulation for the arts, cultural and creative industries. Because of Nordicity's international presence, it has become widely recognized for its ability to translate developments and best practices between markets for the private, public and third sectors.

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## 1. Introduction

In the following report, Nordicity provides an update to the study entitled, *Analysis of Government Support for Public Broadcasting and other Culture in Canada*, first prepared for CBC|Radio-Canada in June 2006 and updated in January 2009 and February 2011.<sup>1</sup> This update also includes statistics and analysis of public broadcasters' commercial and advertising revenues, operating expenditures, and new-platform revenues and expenses.

The international comparisons in this report are based on 2011 funding levels. As such, it does not include changes to public funding levels already announced in subsequent years.

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<sup>1</sup> Due to changes in data sources, methodology and exchanges rates, the public funding statistics for certain countries in this report are not comparable to statistics in previous editions of this report.

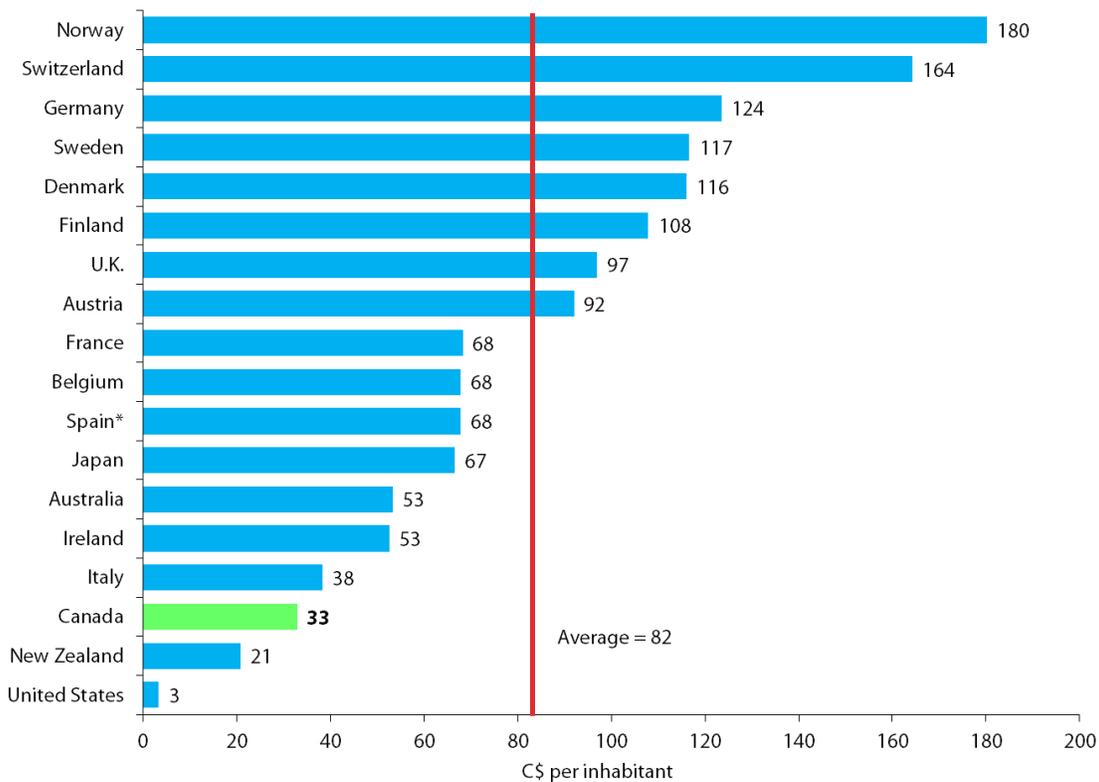
## 2. International Comparison of Public Broadcasters

### 2.1 Public funding for public broadcasters

Among 18 major Western countries, Canada was third in terms of the lowest level of per-capita public funding for public broadcasting in 2011. Only New Zealand and the United States (U.S.) posted lower levels. At \$33 per inhabitant<sup>2</sup> (all amounts in Canadian dollars, unless indicated otherwise), Canada's level of funding was 60% less than the \$82 average across the 18 Western countries. CBC|Radio-Canada is often compared to the BBC in the United Kingdom (U.K.), but notably CBC|Radio-Canada has only one-third of the level of per capita public funding as public broadcasters in the U.K. – BBC and S4C. Canada's level of funding was less than one-fifth of the level of the leading country in terms of public funding, Norway, where the public broadcasting, NRK, received the equivalent of \$180 per capita in 2011.

CBC/Radio-Canada's funding will decline further as a result of the federal deficit reduction action plan (DRAP). When the cuts are fully implemented in 2014/15 fiscal year, CBC/Radio-Canada's per capita funding will decline from \$33 to \$29.

**Figure 1 Per capita public funding for public broadcasters, 2011**



Source: Nordicity analysis of annual reports of public broadcasters; see References and Data Sources and Appendix A for additional detail.

\* Statistics for Spain include an estimate for the autonomous region public broadcasters.

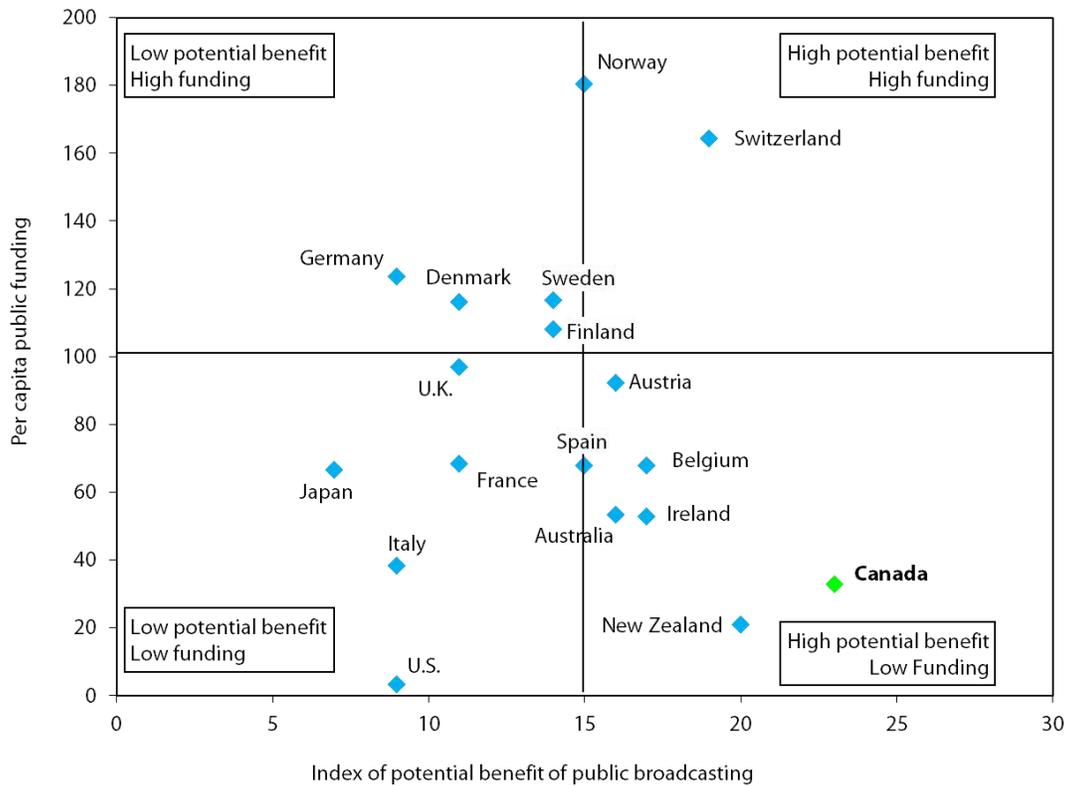
<sup>2</sup> This figure excludes the public funding of provincial educational broadcasters: TéléQuébec, TVOntario, TFO and Knowledge Network BC. The public funding for these broadcasters was equal to approximately \$4 per inhabitant in 2011.

### 3. The Potential Benefits of Public Broadcasting

As a further element in making an international comparison, Nordicity assessed the sociocultural environment in each of the 18 Western countries included in its analysis and postulated the potential benefits that a public broadcaster could provide to a country. Nordicity then rated each of the 18 Western countries in terms of how valuable these benefits would be to that country. Nordicity's numerical scoring of these potential benefits from public broadcasting is presented in Figure 9 (below); additional details on the scoring methodology can be found in Appendix B.

We compared each country's potential-benefits rating to its per-capita level of public funding for public broadcasting. The resulting plot (Figure 9) shows that Canada has one of the lowest levels of government financial support for public broadcasting, despite the fact that it has a sociocultural environment that is likely to generate relative high potential benefits from public broadcasting.

**Figure 9 Comparison of potential benefit and funding of public broadcasting**



Source: Nordicity analysis, PRS Group Inc. and EurodataTV.

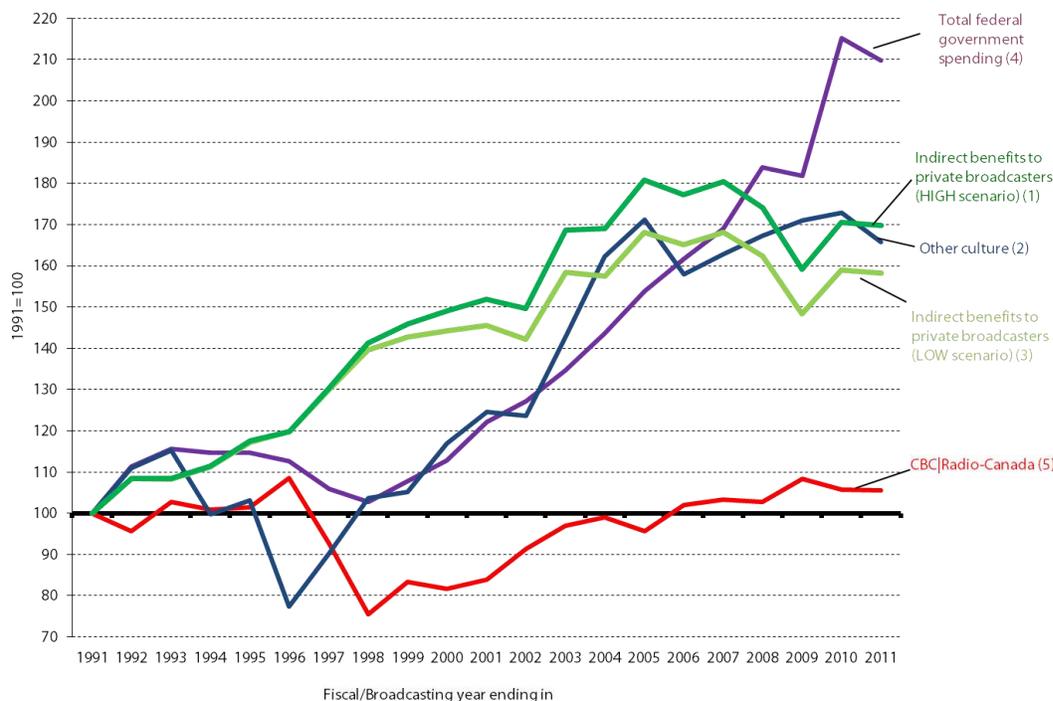
## 4. The Federal Government's Economic Support for Culture

A comparison of the trends between 1991<sup>4</sup> and 2011 in overall federal government program spending (excluding national defence and debt payments) and different types of federal government support for culture, including CBC|Radio-Canada indicates that:

- Federal government support for the **CBC|Radio-Canada** (including direct and indirect support) **increased by 5%**.
- Federal government **spending on other culture** (excluding the CBC|Radio-Canada) increased by **66%**.
- **Total federal government spending** (excluding national defence and debt payments) grew by **110%**.
- The total revenue impact of **indirect government support for private broadcasters** (under the high-impact scenario) grew by **70%**; under the low-impact scenario, the revenue impact grew by **58%**.

Note that the value of **indirect government support for private broadcasters** fell between 2007 and 2009 as a result of the drop in the advertising revenues of English-language private conventional television broadcasters during this period.

**Figure 10 Federal government expenditures and economic support of culture, 1991 = 100**



Source: Nordicity calculations based on data from Statistics Canada, *CANSIM*, matrix 325-0002; *Public Accounts for Canada*; CRTC; Donner and Lazar; and CBC|Radio-Canada.

(1) Indirect benefits to private broadcasters (HIGH scenario) are the sums of estimates for simultaneous substitution and section 19.1.

(2) Other culture includes all federal government expenditures on culture and broadcasting, excluding payments to CBC|Radio-Canada.

(3) Indirect benefits to private broadcasters (LOW scenario) are the sums of estimates for simultaneous substitution and section

<sup>4</sup> In this section we have reverted to single-year denominations, e.g., 1996, to account for different year-ends for federal government financial statistics and broadcasting sector statistics. The former have a March 31 year-end; the latter have an August 31 year-end. The term 1996, therefore, refers to statistics from the government fiscal and broadcasting years ending in 1996.

## Appendix A - Statistics for Public Broadcasters

To construct the comparison of per-capita funding for public broadcasters, we collected and totalled the amounts of public funding in 2011 for each country's public broadcasters. We included all types of funding that were determined by some branch of the government, including television/radio licence fees and any forms of direct government aid or grants. We converted the public-funding amounts to Canadian dollars using the average exchange rate for 2011. We then divided this Canadian dollar amount by the population of each country. This process yielded a per-capita comparison of the level of public funding for public broadcasters in the 18 countries.

**Table 2 Calculation of per-capita public funding levels, 2011**

	Total public funding in home currency	Exchange rate (C\$ per foreign currency)	Total public funding in C\$	Population	Public funding per capita 2011 (\$)
Australia	A\$1,164,529,000	1.0206	1,188,518,297	22,300,000	53.30
Austria	€548,200,000	1.3767	754,706,940	8,200,000	92.04
Belgium	€512,571,000	1.3767	705,656,496	10,400,000	67.85
Canada (CBC)	\$1,137,145,000	1.0000	1,137,145,000	34,600,000	32.87
Denmark	Dkr. 3,516,200,000	0.1848	649,793,760	5,600,000	116.03
Finland	€415,415,000	1.3767	571,901,831	5,300,000	107.91
France	€3,271,798,000	1.3767	4,504,284,307	66,000,000	68.25
Germany	€7,275,146,959	1.3767	10,015,694,818	81,100,000	123.50
Ireland	€183,623,000	1.3767	252,793,784	4,800,000	52.67
Italy	€1,708,400,000	1.3767	2,351,954,280	61,500,000	38.24
Japan	¥682,010,055,000	0.0124	8,470,564,883	127,300,000	66.54
New Zealand	NZ\$116,721,000	0.7824	91,322,510	4,400,000	20.76
Norway	Nkr. 4,800,000,000	0.1765	847,200,000	4,700,000	180.26
Spain	€2,334,635,782	1.3767	3,214,093,081	47,400,000	67.81
Sweden	Skr 6,959,618,000	0.1525	1,061,341,745	9,100,000	116.63
Switzerland	Sfr. 1,175,190,000	1.1187	1,314,685,053	8,000,000	164.34
U.K.	£3,874,459,000	1.5861	6,145,279,420	63,400,000	96.93
U.S.	US\$1,058,116,000	0.9891	1,046,549,946	316,700,000	3.30
			<b>Average</b>		<b>\$81.62</b>

Source: See References and Data Sources for list of data sources; exchange rates from Bank of Canada; population data from Google.com.

**Notes:**

Australia includes funding for ABC and SBS.

Belgium includes funding for Flemish-language public broadcaster (VRT) and French-language public broadcaster (RTBF).

Germany includes public funding for ZDF, ARD, Deutschlandradio and other public broadcasters in the lander.

Spain includes public funding for RTE and estimates for public funding of public broadcasters for the autonomous regions.

U.K. includes public funding for BBC and S4C.

**Table 3 Public broadcasters' revenues, 2011**

Country	Broadcaster	Home currency	Revenues (home currency)			Share of total revenues	
			Total	Commercial revenues	Advertising and sponsorship revenues	Commercial revenues	Advertising and sponsorship revenues
Australia	ABC	A\$	1,136,876,000	144,492,000	0	13%	0%
	SBS	A\$	301,833,000	76,404,000	57,248,000	25%	19%
	Total	A\$	1,438,709,000	220,896,000	57,248,000	15%	4%
Austria	ORF	€	996,900,000	216,700,000	216,700,000	22%	22%
Belgium			420,100,000				
	VRT	€		92,100,000	54,900,000	22%	13%
	RTBF	€	320,243,000	87,090,000	0	27%	0%
Total	€	740,343,000	179,190,000	54,900,000	24%	7%	
Canada	CBC Radio-Canada	\$	1,799,512,000	614,254,000	372,628,000	34%	21%
Denmark	Danmarks Radio	Dkr.	3,866,300,000	0	0	0%	0%
Finland	Yleisradio	€	432,464,000	13,127,000	0	3%	0%
France	France Televisions	€	2,887,700,000	423,700,000	423,700,000	15%	15%
	Radio France	€	632,728,000	64,130,000	41,337,000	10%	7%
	RFI	€	252,500,000	0	0	0%	0%
	Total	€	3,772,928,000	487,830,000	465,037,000	13%	12%
Germany	ZDF	€	2,057,100,000	315,300,000	125,800,000	15%	6%
	ARD	€	6,360,300,000	1,019,100,000	381,618,000	16%	6%
	Deutschlandradio	€	218,273,682	26,126,723	0	12%	0%
	Total	€	8,635,673,682	1,360,526,723	507,418,000	16%	6%
Ireland	RTE	€	350,880,000	167,257,000	131,975,000	48%	38%
Italy	RAI	€	2,973,900,000	1,116,400,000	883,900,000	38%	30%
Japan			694,576,811,000				
	NHK	¥ 000s	0	9,131,956,000	0	1%	0%
New Zealand	TVNZ	NZ\$	377,896,000	340,416,000	302,723,000	90%	80%
	RNZ	NZ\$	38,424,000	2,719,000	0	7%	0%
	Maori Television	NZ\$	36,438,000	2,091,000	1,598,000	6%	4%
	Total	NZ\$	452,758,000	345,226,000	304,321,000	76%	67%
Norway	NRK	Nkr.	5,000,000,000	0	0	0%	0%
Spain	RTVE	€	1,200,000,000	550,000,000	0	46%	0%
	Regional broadcasters	€	943,500,000	239,770,000	192,500,000	25%	20%
	Total	€	2,143,500,000	789,770,000	192,500,000	37%	9%
Sweden	Sveriges Television	Skr.	4,209,000,000	0	0	0%	0%
	Sveriges Radio	Skr.	2,513,328,000	0	0	0%	0%
	UR-Educational	Skr.	293,717,000	0	0	0%	0%
	Total	Skr.	123,785,307,657	0	0	0%	0%
Switzerland	SRG-SSR	Sfr.	1,645,403,000	388,172,000	338,300,000	24%	21%
U.K.	BBC	£	4,993,000,000	1,495,200,000	0	30%	0%
	Channel 4	£	941,400,000	941,400,000	778,900,000	100%	83%
	S4C	£	93,060,000	2,483,000	2,483,000	3%	3%
	Total	£	6,027,460,000	2,439,083,000	781,383,000	40%	13%
U.S.	US public television	US\$	1,773,948,000	613,079,000	337,413,000	35%	19%
	US public radio	US\$	1,061,978,000	574,204,000	288,847,000	54%	27%
	Total	US\$	2,835,926,000	1,187,283,000	626,260,000	42%	22%

Source: See References and Data Sources for a list of data sources.

**Table 4 Public broadcasters' operating expenditures, 2011**

Country	Broadcaster	Home currency	Operating expenditures (home currency)			Share of total operating expenditures
			Total	Television operations	Radio operations	Television operations
Australia	ABC	A\$	1,134,969,000	608,343,384	215,644,110	54%
	SBS	A\$	304,496,000	--	--	--
	Total	A\$	1,439,465,000	--	--	--
Austria	ORF	€	987,900,000	--	--	--
Belgium	VRT	€	420,400,000	244,900,000	90,100,000	58%
	RTBF	€	316,706,000	--	--	--
	Total	€	737,106,000	--	--	--
Canada	CBC Radio-Canada	\$	1,834,219,000	1,341,556,505	338,909,526	73%
Denmark	Danmarks Radio	Dkr.	3,251,300,000	--	--	--
Finland	Yleisradio	€	433,904,000	164,000,000	65,000,000	37%
France	France Televisions	€	2,568,800,000	2,568,800,000	0	100%
	Radio France	€	627,902,000	0	627,902,000	0%
	RFI	€	--	--	--	--
	Total	€	--	--	--	--
Germany	ZDF	€	1,984,900,000	--	--	--
	ARD	€	--	--	--	--
	Deutschlandradio	€	223,802,526	--	223,802,526	0%
	Total	€	--	--	--	--
Ireland	RTE	€	363,507,000	205,503,000	58,905,000	57%
Italy	RAI	€	2,278,600,000	--	--	--
Japan	NHK	¥ 000s	--	--	--	--
New Zealand	TVNZ	NZ\$	346,085,000	346,085,000	0	100%
	RNZ	NZ\$	13,987,000	0	13,254,000	0%
	Maori Television	NZ\$	36,210,000	36,210,000	0	100%
	Total	NZ\$	395,549,000	382,295,000	13,254,000	97%
Norway	NRK	Nkr.	--	--	--	--
Spain	RTVE	€	--	--	--	--
	Regional broadcasters	€	--	--	--	--
	Total	€	--	--	--	--
Sweden	Sveriges Television	Skr.	4,167,000,000	4,167,000,000	0	100%
	Sveriges Radio	Skr.	2,516,981,000	0	2,516,981,000	0%
	UR-Educational	Skr.	--	--	--	--
	Total	Skr.	--	--	--	--
Switzerland	SRG-SSR	Sfr.	1,614,950,000	--	--	--
U.K.	BBC	£	4,602,300,000	2,375,400,000	638,900,000	52%
	Channel 4	£	917,400,000	883,100,000	0	93%
	S4C	£	99,147,000	93,858,000	--	95%
	Total	£	5,618,847,000	3,352,358,000	638,900,000	60%
U.S.	US public television	US\$	--	--	--	--
	US public radio	US\$	--	--	--	--
	Total	US\$	--	--	--	--

Sources: See References and Data Sources for a list of data sources.

In Table 5 we provide data on public broadcasters' new-platform revenues and expenses. We note that new-platform data were only available from public reports for a small sample of the 32 public broadcasters included in our research. This small sample provides us with partial data on new-platform revenues or expenses in 9 of the 18 comparison countries. We also note that the precise definition of new-platform operations can vary from broadcaster to broadcaster. For example, public broadcasters' definitions of online or Internet revenues or expenses may differ. As such, the new-platform statistics may not be directly comparable across broadcasters.

**Table 5 Public broadcasters' new-platform revenues and expenses, 2011**

Country	Broadcaster	Home currency	Operating revenues		Operating expenditures	
			Amount (home currency)	Share of total operating revenues	Amount (home currency)	Share of total operating expenditures
Australia	ABC	A\$	--	--	19,110,320	1.7%
	SBS	A\$	--	--	--	--
	Total	A\$	--	--	--	--
Austria	ORF	€	--	--	--	--
Belgium	VRT	€	--	--	14,500,000	3.4%
	RTBF	€	--	--	--	--
	Total	€	--	--	--	--
Canada	CBC Radio-Canada	\$	8,376,000	0.5%	--	--
Denmark	Danmarks Radio	Dkr.	--	--	--	--
Finland	Yleisradio	€	--	--	21,000,000	5.0%
France	France Televisions	€	--	--	--	--
	Radio France	€	--	--	--	--
	RFI	€	--	--	--	--
	Total	€	--	--	--	--
Germany	ZDF	€	--	--	--	--
	ARD	€	--	--	--	--
	Deutschlandradio	€	--	--	--	--
	Total	€	--	--	--	--
Ireland	RTE	€	17,203,000	4.9%	16,368,000	4.5%
Italy	RAI	€	15,700,000	0.5%	13,100,000	0.6%
Japan	NHK	¥ 000s	295,121,000	0.04%	--	--
New Zealand	TVNZ	NZ\$	--	--	--	--
	RNZ	NZ\$	--	--	--	--
	Maori Television	NZ\$	--	--	--	--
	Total	NZ\$	--	--	--	--
Norway	NRK	Nkr.	--	--	--	--
Spain	RTVE (Spain)	€	--	--	--	--
	Regional broadcasters	€	--	--	--	--
	Total	€	--	--	--	--
Sweden	Sveriges Television	Skr.	--	--	--	--
	Sveriges Radio	Skr.	--	--	--	--
	UR-Educational	Skr.	--	--	--	--
	Total	Skr.	--	--	--	--
Switzerland	SRG-SSR	Sfr.	--	--	--	--
U.K.	BBC	£	--	--	194,200,000	4.2%
	Channel 4	£	52,800,000	5.6%	46,300,000	5.0%
	S4C	£	--	--	--	--
	Total	£	--	--	--	--
U.S.	US public television (2008)	US\$	--	--	--	--
	US public radio (2008)	US\$	--	--	--	--
	Total (2008)	US\$	--	--	--	--

Sources: See References and Data Sources for a list of data sources.

Chapter 2  
Canadian Content in University Libraries,  
Journals, Courses, and Bookstores

## **CANADIAN CONTENT IN UNIVERSITY LIBRARIES, JOURNALS, COURSES, AND BOOKSTORES OVERVIEW**

For the purposes of this document, we are looking at Canadian-published content in Canadian university library collections and journals, Canadian-published and/or authored content in Canadian university courses and spending on such insofar as it is available, and trade book sales in university bookstores and the impact of the takeover of many Canadian stores by foreign management.

Both anecdotally, in email and voice conversations with university librarians, scholarly journal publishers and university press publishers, and in the limited research that is available or accessible in the short research time available, it is clear that the environment at university and college libraries has dramatically shifted over the past twenty years. Fundamental to this new environment are a number of factors: the preference for the acquisition of digital content over print; the university's preference for Open Access models; the purchasing of books through approval plans that are generally US based; the decline of the Canadian against the US dollar; the dominance of large, foreign journal aggregators such as Elsevier and Springer which consume significant portions of university library budgets; the low circulation use of print materials; and the reallocation of stack space to study space. All of these factors are having an impact on the sales of Canadian books in the university sector.

### **UNIVERSITY LIBRARIES: CANADIAN CONTENT**

This researcher has not been able to find any research on Canadian content in Canadian university libraries through Association of Canadian University Presses (ACUP) or through the Association of Canadian Publishers (ACP) as directed, although both organizations may have contributed to some of the research referred to below. The following is what has been found online to date and within the time constraints, but which hopefully will provide some kind of picture around university collections, budgets, and the future of print and digital collections.

#### **Canadian university library expenditures and percentage of university budgets**

Looking at expenditures on books and journals by university libraries, the Canadian Association of Research Libraries (CARL), [Expenditures, Establishments and Collections, Emerging Trends, Facilities and Services](#), September 2017 provides interesting data. Their table of library expenditures 2015-16 (p.3) shows total library materials spending at \$311,105,744 with a one-time resources purchase of \$57,994,622 (on-going resource purchases and library support make up the other expenditures in the total). There is no way of knowing how much of this is for Canadian print or ebook materials. Presumably journal spending falls in the on-going resource purchase column.

Canadian university library spending (expressed in US dollars) from the top 55 US and Canadian libraries and extracted from [The Chronicle of Higher Education, Spending by University Research Libraries, 2012-13](#), August 2014 includes nine Canadian institutions. University of Toronto ranked 3<sup>rd</sup> after Harvard and Yale with materials spending of \$42,824,113 and total library spending of \$77,464,495 for a ratio of 55.28%. The ratio of materials spending to total library

spending for the remaining eight institutions ranged from 54.91% (University of Saskatchewan) to 36.23% (University of Montreal).

Materials spending represented 38.8% of total library expenditures, CARL'S [Expenditures, Establishments and Collections, Emerging Trends, Facilities and Services](#), (p.6) Table II. *Ratio of material expenditures and library expenditures to university expenditures*, (p.46) shows a national average total materials expenditure of \$11,474,698 and a total university general operating expenditure at \$605,242K. Materials expenditures representing 1.90% of the total university expenditure and 4.38% in library expenditures. In Table VIII. *Summary of changes in ratio of library expenditures to university expenditures* (p.56), we see a national average percentage change in university expenditures from 2012-2016 of 12.07% and a percentage change in materials expenditures to 15.10%. While it appears that collection spending increased in this time period, it is almost certainly being allocated to the acquisition of electronic journal subscriptions as is noted in the Journals section below.

eBOUND Canada's [eBook Collection Practices: A Report to the Canadian Publishing Community on Trends, and Issues in Canada's Public](#) also provides pertinent information on university library funding and overall budgets. Citing the 2012 Canadian Association of University Business Officers' (CAUBO) *2012-2013 Financial information of Universities and Colleges* report, the national average for library funding in 2012 was less than 7% of the Canadian university total for operating expenditures. (p.26) "According to the 2011/12 Canadian Association of Research Libraries (CARL) statistics, on average, of the money allocated for books and journals in Canada's research libraries, over 70% was spent on journals and less than 30% on books. Electronic journal expenditures accounted for 85% of the journal expenditures compared to only 28% of the book expenditures for electronic books. Carleton University library reported that the portion of the collections budget allocated to electronic resources has steadily increased from 54% in 2005-2006 to over 70% in 2012-2013. In comparison, the print monograph budget declined 32% between 2009 and 2012. The trend that Carleton's numbers reflect is typical." (p.29-30)

### **Canadian ebook collections**

While statistics on library holdings of Canadian-published books are hard to find, there are some clues to the numbers in the work of the partners of Association of Canadian University Presses/Association des Presses Universitaires Canadiennes (ACUP/APUC), eBOUND Canada, the Canadian Research Knowledge Network (CRKN) and the Ontario Council of University Libraries (OCUL). In a 2014 press release [New Partnership Benefits Smaller Libraries and Canadian Scholarly Presses](#) the participating partners announced an agreement that will bring Canadian ebooks to six small university libraries (ten were added in February of that year). They celebrated the value of the then 6,000-title collection noting that "24% of the most-used titles were from the ACUP collection. This is impressive given the ACUP collection comprises only around 2% of the entire list of commercial titles available on the platform."

The information document [ACUP/APUC 2017 Digital Collection](#) in the same partnership of the above organizations offers perpetual access ebook licenses from ACUP/APUC members for more than 10,000 ebooks from Canadian university and trade publishers. Twenty-eight Canadian

libraries have signed on. The collection is accessed through the [Scholars Portal](#), a service of the OCUL. “The Scholars Portal technological infrastructure, including the Scholars Portal Books platform, preserves and provides access to information resources collected and shared by university libraries...Scholars Portal also supports the online inter-library loan platform for Ontario’s universities ...”.

An eBOUND Canada survey of le Bureau de cooperation interuniversitaire (BCI), CAUL, COPPUL and OCUL members as well as CRKN members undertaken in 2015 indicated that “at least half of the respondents plan to increase budgets for ebooks this fiscal year. ... *Library Journal's* 2011 ebook survey reported a 93% increase in ebook collections in academic libraries since 2011.” (p.29). The eBOUND survey also noted, as did librarians canvassed by the researcher, that children’s and image heavy books as still preferred in print format and that Canadian literature is purchased in both print and electronic formats.

The eBOUND Canada survey also noted from their survey that there was “no single dominant ebook aggregator or collection model. The majority of respondents were acquiring collections from Springer (22 of 25 respondents) and the Canadian Electronic Library (23 of 25).” (p.34)

### **Canadian print book collections**

The CARL expenditures data presented above may provide an idea of collection spending on monographs; it doesn’t, however, show expenditures on Canadian-published books. A library colleague commented to an enquiry about the lack of data: “My recollection when I tried to assess it, was that Canadian vs. other books for universities and college libraries is really difficult to ascertain. One reason, for example, is that most academic libraries acquire (or historically acquired) significant portions of their monograph collections through some sort of approval plan, often US-based. The result was that in many cases the version acquired might have been the US edition for Canadian works etc. and vice versa (even for university presses).”

Parenthetically, this form of parallel importation is acceptable under Canada’s Copyright Act, section 45.(1) (a): “A library, museum, or educational institution may similarly import a single copy of a book without sourcing it through the Canadian rights holder.” [The Role of the Book Importation Regulations in Canada’s Market for Books](#), April 2012. (p.7)

The eBOUND Canada study references the reallocation of stack space to create study space and the low print usage data having further negative impacts on the acquisition of monographs for university library collections. “Print still dominates” it states but “print purchases by university libraries have recently decreased by 15%, while ebooks have increased by the same amount.” (p.28)

### **University libraries looking to the future**

The research seems to indicate that Canadian publishers are well placed to promote and market their books in both print and electronic formats to already supportive Canadian university librarians who have established networks based on region, mutual interest, and shared concerns.

Practically, [eBook Collection Practices: A Report to the Canadian Publishing Community on Trends, and Issues in Canada's Public](#) suggests that "The majority of university library respondents to the eBOUND Survey purchase print and electronic title-by-title Canadian ebook content through approval plans with Coutts and Yankee Book Pedlar (YBP), Renaud-Bray, and on aggregator platforms including EBSCOhost, JSTOR, and Project Muse. For Canadian publishers, it seems vital that print and ebook content be profiled with the major approval book vendors (YBP and Coutts) to gain exposure and to ensure integration into the workflows and processes university libraries are using for identification, selection, and purchasing of books." (p.36)

There is also a lot of information available regarding sharing resources amongst libraries as usage of print collections declines along with financial resources and physical space. The work being done in this arena is very compelling and is of interest to academic publishers as they consider future collection development.

As this paper, [Canadian Universities and Sustainable Publishing: A White Paper](#), 2016 prepared for CARL states in its opening pages: "In Canada and worldwide, universities need to decide how best to invest in scholarly communications to support research today." (p.1) It goes on to provide a history of the changes in scholarly communication since the 1990s including citing the establishment of CRKN, whose objectives were "to increase the quantity, breadth and depth of scholarly content available to academic researchers throughout Canada; to speed the transition from print-based to digital and value-added forms of scholarly content; and to leverage Canadian universities' buying power and influence in the international scholarly publishing marketplace, achieving advantageous terms and conditions for usage and developing new business and service models." CRKN, as mentioned above, has been successful on many levels which have been of benefit to publishers and to libraries including joint purchases, greater control of license agreements through creation of a model license, and reach to 75 Canadian university members and management of 54 licenses with key academic publishers.

In the fall of 2017, a forum was convened in Ottawa as a follow up to one coordinated earlier by the US Center for Research Libraries. [@Risk North \(Collections en peril\)](#), jointly supported by CARL, the Center for Research Libraries, Library and Archives Canada, and University of Toronto Libraries, sought "Cooperative approaches to acquiring, storing, preserving, and managing the reduction of print collections ..., employing a variety of models that seek to distribute the expense and responsibility while creating value for all parties." Constance Malpas, co-author of [Print Management at "Mega-scale": A Regional Perspective on Print Book Collections in North America](#) speaking at the forum, provided arguments for consolidating collections and research on mega-regions which, she contends "offer a compelling framework within which to think about a regional consolidation of print book collections organized as a flow model—that is, a virtual consolidation of local collections aimed at encouraging a flow of materials around the region. Mega-regions encompass existing networks - both physical and virtual - of integration and mutual interest that could potentially absorb and support a new network of cooperative print management and shared use. ..., the vast majority of the overall North American print book collection is clustered within the twelve mega-regions. In this sense, mega-regions might be a 'natural unit of analysis' for cooperative print management." (p.17)

In Canada, The Council of Prairie and Pacific University Libraries (COPPUL) with 37 members from Victoria to Winnipeg and with affiliates across the country are sharing digital and print resources through their [Shared Print Archive Network \(SPAN\)](#). “SPAN's main goals are to provide access to shared print archives, create opportunities for the reallocation of library space, and preserve the print record for its members in a cost-effective way. Rather than thinking about the project in terms of preserving the "last copy," this partnership emphasizes the role of the archived print as part of an optimal copy network that includes other print archiving initiatives.”

As we are aware, the escalating cost of international journals has in part driven this kind of sharing economy, possibly, though likely not significantly, to the detriment of academic book sales not just in Canada. [eBook Collection Practices: A Report to the Canadian Publishing Community on Trends, and Issues in Canada's Public](#) suggests “small scale experimentation with library partners to test new business and access models should be attempted by Canadian publishers, as well as comprehensive title profiling into book approval systems and expanded partnerships with Scholars Portal for long-term preservation of all Canadian ebook content.” (p.3). Are there opportunities for Canadian publishers to negotiate collectively with organizations such as CRKN, OCUL and COPPUL on behalf of print books and journals? *eBook Collection Practices* notes that, “These organizations act as advocates on behalf of research libraries in national and international policy and technology discussions. These organizations would be potential partners with publishers to advocate to government for policy changes to funding programs. (p.26) As my library colleague suggested, “the need is a marketing one -- persuade the libraries this is a joint issue independent of budgets, one they should espouse as a cause. Which suggests CARL might be a place to start.”

In announcing the release of the summary report for the above mentioned @Risk North forum, CARL noted that it “looks forward to working with existing shared print initiatives and with national and regional organizations on advancing the recommendations from this forum. By thinking and acting strategically to collectively preserve our nation’s research collections in both digital and print/analog formats, CARL is confident that our institutions can achieve a coherent and mutually beneficial strategy to benefit our current and future researchers.”

## **UNIVERSITY JOURNALS**

While the purpose of this section of this document is to look at book reviews in Canadian scholarly journals and their impact on course adoptions and other purchases, the following short overview, provides the context in which these journals are operating.

In February 2018, CARL released a brief entitled [Responding to Unsustainable Journal Costs](#) addressed to Canadian university administrators regarding the state of international scholarly journal costs with recommendations on how to address the situation. The impact on library collection budgets that the cost of international journals has had on Canadian print and ebook acquisitions is equally borne by many Canadian academic journals. The brief notes that the cost of international journals rose 25% over four years and that in Canada, “the 29 academic libraries that are members of CARL paid about \$167 million collectively for subscriptions to electronic content (a large part of which is journals); \$215 million in 2014; and approximately \$260 million

in 2016. (p.2-3). The brief goes on to say, “The entire scholarly community is highly invested in the scholarly publishing system, and therefore it is our collective duty to ensure it is functioning effectively, and that we are using public funds in a responsible manner.” (p.8) It goes on to make four recommendations.

The drive for university libraries to save money in addition to their reluctance to pay article processing fees has created a difficult environment for many of the 300 or so active, peer-reviewed, Canadian journals struggling to survive. Canadian journals are available in both print and electronic versions; historically 80% were available in print only, that number has diminished to approximately 20%. Some 100+ of our best journals with the highest percentage of foreign distribution and who might be already sitting in Springer or Elsevier collections rely on subscription revenue from print and digital aggregators, which potentially creates a conundrum when reduced fees are negotiated through consortium buying but overall buying is reduced by the huge fees paid to the aggregators. Universities are also encouraging full Open Access for journals – and 50%-60% are - but the business model is unsustainable. Social science and Humanities journals contain far higher Canadian content than the Science journals.

Academic journals determine their impact by how many authors subsequently cite their articles which is tracked through bibliographies. More recently and inevitably metrics on citations through tweets, blogs, and other social media are being obtained.

Many Canadian scholarly journals provide book reviews, although there is no quantifiable data on the number of reviews or on their effectiveness in driving book sales. As a publishing colleague pointed out, however, since reviews often come out two years or so after publication and since university presses are in constant contact with their customer base through electronic communication and social media, it’s likely the customer will have ordered before the book review appears. That does not, however, diminish the value of the book review for renewed sales after the initial push. As journals continue to exploit their online presence linking to more digital entities, there will be a change in the culture that could be of benefit to the Canadian book industry.

#### **UNIVERSITY COURSES: CANADIAN-AUTHORED MATERIALS**

There does not appear to be any data on the use of Canadian-authored or published works in Canadian or otherwise universities and colleges, although I just learned that ACUP is doing work in this area looking at Quebec bookstores and university presses. One university press queried estimated that 23% of their domestic print revenue comes from sales to college bookstores, although this doesn’t break down to sales related to course adoption vs. general trade sales, it is a significant portion of their overall sales revenue. Sales to trade stores including Indigo/Chapters and sales to wholesalers made up the second two largest sales revenue sources with sales to Amazon not too far behind. Without data, there is no way of knowing if this is common to other Canadian university presses. Data has been requested from Canada Book Fund, Canadian Heritage but has not yet been delivered.

Some of the same factors that are affecting journal sales are duplicated in course book sales for university presses. University presses are anticipating a reduction in revenue as a result of the push to Open Access, free use of chapters in course packs and the Copyright Act educational exemptions.

We might learn something from a 2016-2017 US survey conducted by Student Watch that polled more than 41,000 students at 56 institutions (43 four-year campuses and 13 two-year campuses) from 30 US states and two Canadian provinces. [Student Behaviors Related to Course Materials](#) determined that annual spending on course material has decreased 17% since 2007. 82% of students purchase their books at the campus store, 40% on Amazon, 8% from peers/student, 7% from Chegg.com (an American online textbook rental company), 7% from the publisher's website. They bought (86%), rented (43%), downloaded (13%) or borrowed (12%). The formats preferred were new at 74%, used at 70%, and digital at 23%.

### **UNIVERSITY BOOKSTORES: TRADE BOOK SECTIONS**

While there is no data to answer the question of the significance of trade book sections in university bookstores or campus stores as they are now largely called, the US organization, the National Association of Campus Stores, in their semi-annual report *Student Watch* identified that "the campus store plays an influential role in helping students buy or rent course materials. Seventy-six percent of students say the physical or online campus store is their preferred source of course materials." One can extrapolate that trade books that appear in the campus bookstore will benefit from exposure to a loyal clientele and to strategies being encouraged by the universities and colleges to bring to and keep student in the stores.

Significant also are the North American industry statistics quoted in a 2015 article in *The Star*, [Campus bookstores change in the digital age](#) that show that total sales and textbook sales are declining between 3% to 6% a year. This situation has led Campus Stores Canada (CSC), which represents 90 independent university and college retailers, to provide professional support for its member stores. (CSC has been contacted for data on Canadian campus stores but there hasn't yet been a response.)

[Campus stores adapt to new student spending trends](#), University Business, 2016 cites the Student Watch data indicating that "On average, students spent \$77 per course, or \$323 total, on materials in fall 2015. Student spending on course materials is actually declining, decreasing nearly 20 percent over the past seven years. But it's not because students are buying considerably fewer materials; they purchased or rented roughly the same number of materials in fall 2015 as in fall 2009."

### **Follett and the 'takeover' of Canadian university and college bookstores**

Follett has over 50 campus stores across Canada. As an American company entering Canada, it somehow avoided scrutiny by Investment Canada but as the authors of *Much Ado About Culture* explain: "American-owned Follett Corporation has a management contract for bookstores in several Canadian universities and colleges. Throughout North America, Follett, in 1998, managed over 500 college bookstores with a total of 3.5 million square feet of space through

which were sold 18 million books and 1.5 million items of clothing. As long as investment is not involved, the approval of Investment Canada is not required for this type of arrangement. Arguably, Follett exercises as much control, with no investment, over the decisions of the Canadian bookstores it manages as would have been exercised by Borders. The former is not vetted, while the latter is not allowed." *Much Ado About Culture: North American Trade Disputes*, Archibald Lloyd Keith Acheson and Christopher John Maule, University of Michigan Press, 1999, revised 2001, p.257

# CARL Statistics | Statistiques de l'ABRC 2015-2016

## Salaries | Salaires 2016-2017

Expenditures, Establishments and Collections  
Emerging Trends  
Use, Facilities and Services

*Dépenses, effectifs et collections*  
*Tendances nouvelles*  
*Utilisation, installations et services*

September 2017 | septembre 2017

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**CARL ABRC**  
CANADIAN ASSOCIATION OF  
RESEARCH LIBRARIES ASSOCIATION DES BIBLIOTHÈQUES  
DE RECHERCHE DU CANADA

Every effort has been made to ensure that the information in this publication is accurate. Nevertheless, limitations exist as regards the reported data. Definitions, collection and reporting methods may vary amongst institutions. Conclusions and comparisons should be made only in conjunction with other assessment methods and with due regard to different organizational structures, goals, priorities and practices.

Nous avons fait tous les efforts nécessaires pour assurer l'exactitude des renseignements dans ce document. Il existe toutefois des limites en ce qui concerne les données déclarées. Les définitions, ainsi que les méthodes de collecte et de déclaration peuvent varier selon les établissements. Pour tirer des conclusions et faire des comparaisons, il faut absolument aussi avoir recours à d'autres méthodes d'évaluation et tenir compte du fait qu'il y a des différences entre les structures, les buts, les priorités et les pratiques des établissements.

**Change from previous years:**

All provincial, regional and national averages and ratios are now calculated by adding and dividing the values provided by each institution. In the past, these were calculated by averaging the averages or averaging calculated ratios. The same applies for calculating medians.

**Changement par rapport aux années précédentes :**

Toutes moyennes et tous ratios provinciaux, régionaux et nationaux sont dorénavant calculés en additionnant puis en divisant les valeurs fournies par chaque établissement. Par le passé, celles-ci étaient calculées en faisant la moyenne des moyennes ou la moyenne des ratios calculés. Le même changement est en place pour calculer les médianes.

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**Revisions | Révisions**

- Table III - Ratio of material expenditures and library holdings to university enrollment  
*Tableau III - Ratio des dépenses sur les documents et les ressources documentaires comparés aux inscriptions universitaires*
  - **Total material expenditures** previously showed values for **total library expenditures**. This has been corrected in the current version.  
*Dépenses documentaires totales* présentaient auparavant des valeurs pour les *dépenses totales de la bibliothèque*. Cela a été corrigé dans la version actuelle.

*This document is formatted for double-sided printing.*

*Ce document est formaté pour une impression recto verso.*

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**Table II – Library materials expenditures (\$)**  
**Tableau II – Dépenses, documents de la bibliothèque (\$)**

	One time resource purchases <i>Achats ponctuels de documents</i>	Ongoing resource purchases <i>Achats permanents de documents</i>	Collection support <i>Soutien des collections</i>	Total library materials <i>Total, documents de bibliothèques</i>
Question	2.1	2.2	2.3	2.4
British Columbia	\$2,517,921 <sup>10</sup>	\$15,283,299	\$173,383	\$17,974,603
Simon Fraser	\$2,659,293	\$7,415,441	\$416,144 <sup>11</sup>	\$10,971,073 <sup>12</sup>
Victoria	\$1,076,489	\$6,183,285	\$662,631	\$7,922,405
Alberta	\$6,872,263	\$18,219,592	\$1,691,664	\$26,783,519
Calgary	\$1,439,540 <sup>13</sup>	\$10,902,907	\$1,806,224 <sup>14</sup>	\$14,148,671
Manitoba	\$2,334,440 <sup>15</sup>	\$10,029,614 <sup>16</sup>	\$696,809	\$13,060,863 <sup>17</sup>
Regina	\$433,901	\$2,683,439	\$11,141	\$3,128,481
Saskatchewan	\$1,378,907 <sup>18</sup>	\$12,171,576 <sup>19</sup>	\$596,298 <sup>20</sup>	\$14,146,78 <sup>21</sup>
Brock	\$537,691 <sup>22</sup>	\$3,203,777 <sup>23</sup>	\$170,295	\$3,911,763
Carleton	\$508,406	\$5,497,474	\$91,428	\$6,097,308
Guelph	\$1,023,808 <sup>24</sup>	\$6,276,961	\$945,962	\$8,246,731
McMaster	\$1,090,636	\$9,809,419	\$657,962	\$11,558,017
Ottawa	\$5,171,056	\$10,988,493	\$13,885	\$16,173,434
Queen's	\$502,540	\$10,110,991	\$649,493	\$11,263,024
Ryerson	\$1,486,756	\$3,721,044	\$26,968	\$5,234,768
Toronto	\$11,252,051	\$21,047,223	\$472,574	\$32,771,848
Waterloo	\$437,038 <sup>25</sup>	\$9,298,339 <sup>26</sup>	\$306,299 <sup>27</sup>	\$10,041,676
Western Ontario	\$1,445,262	\$12,991,459	\$1,092,560	\$15,529,281
Windsor	\$225,423	\$4,812,079	\$352,278	\$5,389,780
York	\$2,503,628 <sup>28</sup>	\$10,251,772	\$84,585	\$12,839,985 <sup>29</sup>
Concordia	\$1,272,599	\$5,238,020	\$237,605	\$6,748,224
Laval	\$1,542,728	\$10,155,981	\$420,879	\$12,119,588
McGill	\$5,712,058 <sup>30</sup>	\$16,026,390	\$476,850	\$22,215,298
Montréal	\$1,454,015	\$9,532,402	\$247,422	\$11,233,839
Sherbrooke	\$577,095 <sup>31</sup>	\$5,232,125	\$76,624	\$5,885,844
UQÀM	\$846,118	\$4,331,250	\$0	\$5,177,368
Dalhousie	\$418,262 <sup>32</sup>	\$7,900,374 <sup>33</sup>	\$424,664 <sup>34</sup>	\$8,743,300
Memorial	\$800,015	\$8,155,620	\$284,387 <sup>35</sup>	\$9,240,022
New Brunswick	\$223,819 <sup>36</sup>	\$3,943,684 <sup>37</sup>	\$41,236	\$4,208,739
Library and Archives Canada	\$18,331	\$219,109	\$12,268	\$249,708
National Science Library	\$162,573 <sup>38</sup>	\$6,304,699	\$71,115 <sup>39</sup>	\$6,538,387
<b>National total   Total national</b>	<b>\$57,924,662</b>	<b>\$267,937,838</b>	<b>\$13,245,481</b>	<b>\$311,105,744</b>

U/A = Unavailable  
Non-disponible

N/A = Not applicable  
Sans objet

N/R = Did not reply  
N'a pas répondu

**Table V - Summary of library expenditures**  
**Tableau V - Sommaire des dépenses de la bibliothèque**

Question	Total materials expenditure (includes binding) <i>Total dépenses des documents</i> (inclus la reliure)	Total staffing expenditure (includes benefits) <i>Masse salariale totale</i> (inclus les avantages sociaux)	Other Operating expenditures <i>Autres dépenses de fonctionnement</i>	Total	Percent of total <i>Pourcentage du total (%)</i>		
					Material / Documents	Salaries / Salaires	Operating / Fonctionnement
	2.4	3.4+4.1	4.2				
British Columbia	\$17,974,603	\$22,441,419	\$5,360,850	\$45,776,872	39.3%	49.0%	11.7%
Simon Fraser	\$10,971,073	\$11,773,545	\$2,024,090	\$24,768,708	44.3%	47.5%	8.2%
Victoria	\$7,922,405	\$9,231,614	\$1,801,177	\$18,955,196	41.8%	48.7%	9.5%
<b>Provincial average   Moyenne provinciale</b>	<b>\$12,289,360</b>	<b>\$14,482,193</b>	<b>\$3,062,039</b>	<b>\$29,833,592</b>	<b>41.2%</b>	<b>48.5%</b>	<b>10.3%</b>
Alberta	\$26,783,519	\$18,558,982	\$4,147,965	\$49,490,466	54.1%	37.5%	8.4%
Calgary	\$14,148,671	\$19,085,257	\$1,282,774	\$34,516,702	41.0%	55.3%	3.7%
Manitoba	\$13,060,863	\$13,786,009	\$2,399,765	\$29,246,637	44.7%	47.1%	8.2%
Regina	\$3,128,481	\$5,159,420	\$781,934	\$8,966,541	34.9%	57.5%	8.7%
Saskatchewan	\$14,146,781	\$12,338,362	\$1,836,720	\$28,321,863	50.0%	43.6%	6.5%
<b>Regional average   Moyenne régionale</b>	<b>\$14,253,663</b>	<b>\$13,785,606</b>	<b>\$2,089,832</b>	<b>\$30,108,442</b>	<b>47.3%</b>	<b>45.8%</b>	<b>6.9%</b>
Brock	\$3,911,763	\$4,741,822	\$431,858	\$9,085,443	43.1%	52.2%	4.8%
Carleton	\$6,097,308	\$10,732,916	\$847,713	\$17,677,937	34.5%	60.7%	4.8%
Guelph	\$8,246,731	\$9,805,482	\$906,185	\$18,958,398	43.5%	51.7%	4.8%
McMaster	\$11,558,017	\$9,946,315	\$1,314,269	\$22,818,601	50.7%	43.6%	5.8%
Ottawa	\$16,173,434	\$13,596,882	\$1,476,053	\$31,246,369	51.8%	43.5%	4.7%
Queen's	\$11,263,024	\$10,474,118	\$1,300,215	\$23,037,357	48.9%	45.5%	5.6%
Ryerson	\$5,234,768	\$8,637,191	\$2,295,403	\$16,167,362	32.4%	53.4%	14.2%
Toronto	\$32,771,848	\$53,591,402	\$11,379,397	\$97,742,647	33.5%	54.8%	11.6%
Waterloo	\$10,041,676	\$10,142,059	\$1,525,891	\$21,709,626	46.3%	46.7%	7.0%
Western Ontario	\$15,529,281	\$12,339,397	\$1,069,207	\$28,937,885	53.7%	42.6%	3.7%
Windsor	\$5,389,780	\$7,204,940	\$91,685	\$12,686,405	42.5%	56.8%	0.7%
York	\$12,839,985	\$16,579,109	\$1,955,660	\$31,374,754	40.9%	52.8%	6.2%
<b>Provincial average   Moyenne provinciale</b>	<b>\$11,588,135</b>	<b>\$13,982,636</b>	<b>\$2,049,461</b>	<b>\$27,620,232</b>	<b>42.0%</b>	<b>50.6%</b>	<b>7.4%</b>
Concordia	\$6,748,224	\$9,625,014	\$935,547	\$17,308,785	39.0%	55.6%	5.4%
Laval	\$12,119,588	\$13,846,267	\$699,491	\$26,665,346	45.5%	51.9%	2.6%
McGill	\$22,215,298	\$14,382,313	\$3,983,419	\$40,581,030	54.7%	35.4%	9.8%
Montréal	\$11,233,839	\$20,431,336	\$1,335,172	\$33,000,347	34.0%	61.9%	4.0%
Sherbrooke	\$5,885,844	\$5,203,936	\$531,550	\$11,621,330	50.6%	44.8%	4.6%
UQÀM	\$5,177,368	\$10,471,718	\$773,957	\$16,423,043	31.5%	63.8%	4.7%
<b>Provincial average   Moyenne provinciale</b>	<b>\$10,563,360</b>	<b>\$12,326,764</b>	<b>\$1,376,523</b>	<b>\$24,266,647</b>	<b>43.5%</b>	<b>50.8%</b>	<b>5.7%</b>
Dalhousie	\$8,743,300	\$9,248,342	\$975,341	\$18,966,982	46.1%	48.8%	5.1%
Memorial	\$9,240,022	\$11,461,401	\$1,641,166	\$22,342,589	41.4%	51.3%	7.3%
New Brunswick	\$4,208,739	\$5,201,357	\$488,054	\$9,898,150	42.5%	52.5%	4.9%
<b>Regional average   Moyenne régionale</b>	<b>\$7,397,354</b>	<b>\$8,637,033</b>	<b>\$1,034,854</b>	<b>\$17,069,240</b>	<b>43.3%</b>	<b>50.6%</b>	<b>6.1%</b>
Library and Archives Canada	\$249,708	\$75,279,304	\$14,725,748	\$90,254,760	0.3%	83.4%	16.3%
National Science Library	\$6,538,387	\$9,103,703	\$418,829	\$16,060,919	40.7%	56.7%	2.6%
<b>Regional average   Moyenne régionale</b>	<b>\$3,394,048</b>	<b>\$42,191,504</b>	<b>\$7,572,289</b>	<b>\$53,157,840</b>	<b>6.4%</b>	<b>79.4%</b>	<b>14.2%</b>
<b>National average   Moyenne nationale</b>	<b>\$10,953,365</b>	<b>\$14,981,320</b>	<b>\$2,281,841</b>	<b>\$28,213,195</b>			
<b>National total   Total nationale</b>	<b>\$339,554,328</b>	<b>\$464,420,932</b>	<b>\$70,737,085</b>	<b>\$874,609,050</b>	<b>38.8%</b>	<b>53.1%</b>	<b>8.1%</b>

U/A = Unavailable  
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N/R = Did not reply  
N'a pas répondu

## Table II – Ratio of material expenditures and library expenditures to university expenditures

### Tableau II – Ratio des dépenses des documents et les dépenses de la bibliothèque comparés aux dépenses de l'université

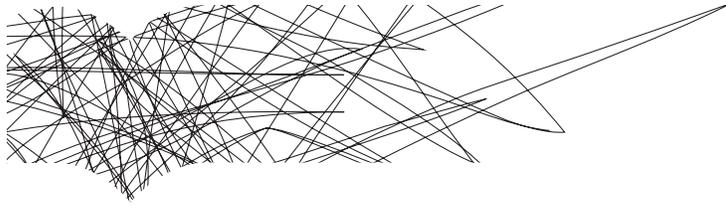
Overview | Aperçu : Ratios 2015-2016

	Total material expenditures <i>Dépenses documentaires totales</i>	Total library expenditures <i>Dépenses totales des bibliothèques</i>	Total university general operating expenditures (in \$,000's) <i>Dépenses universitaires totales en fonctionnement général (en 1000\$)</i>	Ratio (%)	
				Material expenditures/university expenditures <i>Dépenses documentaires/dépenses universitaires</i>	Library expenditures/university expenditures <i>Dépenses des bibliothèques/dépenses universitaires</i>
British Columbia	\$17,974,603	\$45,776,872	\$1,343,727k	1.34%	3%
Simon Fraser	\$10,971,073	\$24,768,708	\$460,999k	2.38%	5.37%
Victoria	\$7,922,405	\$18,955,196	\$336,929k	2.35%	5.63%
<b>Provincial average   Moyenne provinciale</b>	<b>\$12,289,360</b>	<b>\$29,833,592</b>	<b>\$713,885k</b>	<b>1.72%</b>	<b>4.18%</b>
Alberta	\$26,783,519	\$49,490,466	\$1,099,664k	2.44%	4.50%
Calgary	\$14,148,671	\$34,516,702	\$892,752k	1.58%	3.87%
Manitoba	\$13,060,863	\$29,246,637	\$529,766k	2.47%	5.52%
Regina	\$3,128,481	\$8,966,541	\$195,783k	1.60%	4.58%
Saskatchewan	\$14,146,781	\$28,321,863	\$615,449k	2.30%	4.60%
<b>Regional average   Moyenne régionale</b>	<b>\$14,253,663</b>	<b>\$30,108,442</b>	<b>\$666,683k</b>	<b>2.14%</b>	<b>4.52%</b>
Brock	\$3,911,763	\$9,085,443	\$251,096k	1.56%	3.62%
Carleton	\$6,097,308	\$17,677,937	\$420,193k	1.45%	4.21%
Guelph	\$8,246,731	\$18,958,398	\$382,023k	2.16%	4.96%
McMaster	\$11,558,017	\$22,818,601	\$644,296k	1.79%	3.54%
Ottawa	\$16,173,434	\$31,246,369	\$810,715k	1.99%	3.85%
Queen's	\$11,263,024	\$23,037,357	\$492,119k	2.29%	4.68%
Ryerson	\$5,234,768	\$16,167,362	\$540,238k	0.97%	2.99%
Toronto	\$32,771,848	\$97,742,647	\$1,969,681k	1.66%	4.96%
Waterloo	\$10,041,676	\$21,709,626	\$633,711k	1.58%	3.43%
Western Ontario	\$15,529,281	\$28,937,885	\$640,453k	2.42%	4.52%
Windsor	\$5,389,780	\$12,686,405	\$258,770k	2.08%	4.90%
York	\$12,839,985	\$31,374,754	\$819,002k	1.57%	3.83%
<b>Provincial average   Moyenne provinciale</b>	<b>\$11,588,135</b>	<b>\$27,620,232</b>	<b>\$655,191k</b>	<b>1.77%</b>	<b>4.22%</b>
Concordia	\$6,748,224	\$17,308,785	\$399,911k	1.69%	4.33%
Laval	\$12,119,588	\$26,665,346	\$538,369k	2.25%	4.95%
McGill	\$22,215,298	\$40,581,030	\$696,815k	3.19%	5.82%
Montréal	\$11,233,839	\$33,000,347	\$696,068k	1.61%	4.74%
Sherbrooke	\$5,885,844	\$11,621,330	\$337,470k	1.74%	3.44%
UQÀM	\$5,177,368	\$16,423,043	\$393,990k	1.31%	4.17%
<b>Provincial average   Moyenne provinciale</b>	<b>\$10,563,360</b>	<b>\$24,266,647</b>	<b>\$510,437k</b>	<b>2.07%</b>	<b>4.75%</b>
Dalhousie	\$8,743,300	\$18,966,982	\$449,642k	1.94%	4.22%
Memorial	\$9,240,022	\$22,342,589	\$467,552k	1.98%	4.78%
New Brunswick	\$4,208,739	\$9,898,150	\$234,827k	1.79%	4.22%
<b>Regional average   Moyenne régionale</b>	<b>\$7,397,354</b>	<b>\$17,069,240</b>	<b>\$384,007k</b>	<b>1.93%</b>	<b>4.45%</b>
<b>National average   Moyenne nationale</b>	<b>\$11,474,698</b>	<b>\$26,492,875</b>	<b>\$605,242k</b>	<b>1.90%</b>	<b>4.38%</b>

### Table VIII - Summary of changes in ratio of library expenditures to university expenditures

Overview | Aperçu : Ratios 2015-2016

	<b>% of change in university expenditures</b> <i>Variation des dépenses universitaires (%)</i> <b>2012-2016</b>	<b>Material expenditures</b> <i>Dépenses documentaires</i> <b>2012-2013</b>	<b>Material expenditures</b> <i>Dépenses documentaires</i> <b>2015-2016</b>	<b>% of change in material expenditures</b> <i>Variation des dépenses documentaires (%)</i> <b>2012-2016</b>
British Columbia	20.83%	\$15,561,225	\$17,974,603	15.51%
Simon Fraser	8.58%	\$9,092,313	\$10,971,073	20.66%
Victoria	8.77%	\$7,641,378	\$7,922,405	3.68%
<b>Provincial average   Moyenne provinciale</b>	<b>15.99%</b>	<b>\$10,764,972</b>	<b>\$12,289,360</b>	<b>14.16%</b>
Alberta	12.19%	\$19,520,707	\$26,783,519	37.21%
Calgary	24.95%	\$13,091,397	\$14,148,671	8.08%
Manitoba	7.95%	\$10,610,594	\$13,060,863	23.09%
Regina	15.54%	\$3,050,315	\$3,128,481	2.56%
Saskatchewan	23.45%	\$14,262,864	\$14,146,781	-0.81%
<b>Regional average   Moyenne régionale</b>	<b>16.82%</b>	<b>\$12,107,175</b>	<b>\$14,253,663</b>	<b>17.73%</b>
Brock	9.55%	\$3,004,552	\$3,911,763	30.19%
Carleton	21.50%	\$5,537,282	\$6,097,308	10.11%
Guelph	7.28%	\$7,250,949	\$8,246,731	13.73%
McMaster	1.94%	\$9,897,178	\$11,558,017	16.78%
Ottawa	18.45%	\$15,703,900	\$16,173,434	2.99%
Queen's	18.58%	\$10,218,630	\$11,263,024	10.22%
Ryerson	21.56%	\$4,289,107	\$5,234,768	22.05%
Toronto	17.35%	\$28,895,077	\$32,771,848	13.42%
Waterloo	19.81%	\$8,383,213	\$10,041,676	19.78%
Western Ontario	5.53%	\$13,474,561	\$15,529,281	15.25%
Windsor	9.02%	\$4,291,966	\$5,389,780	25.58%
York	3.97%	\$12,105,040	\$12,839,985	6.07%
<b>Provincial average   Moyenne provinciale</b>	<b>13.18%</b>	<b>\$10,254,288</b>	<b>\$11,588,135</b>	<b>13.01%</b>
Concordia	2.29%	\$6,564,027	\$6,748,224	2.81%
Laval	3.89%	\$12,688,626	\$12,119,588	-4.48%
McGill	12.31%	\$16,065,355	\$22,215,298	38.28%
Montréal	3.28%	\$8,596,583	\$11,233,839	30.68%
Sherbrooke	-2.12%	\$5,032,193	\$5,885,844	16.96%
UQÀM	4.25%	\$4,761,216	\$5,177,368	8.74%
<b>Provincial average   Moyenne provinciale</b>	<b>4.66%</b>	<b>\$8,951,333</b>	<b>\$10,563,360</b>	<b>18.01%</b>
Dalhousie	9.29%	\$7,374,509	\$8,743,300	18.56%
Memorial	-0.01%	\$8,355,568	\$9,240,022	10.59%
New Brunswick	12.16%	\$3,783,911	\$4,208,739	11.23%
<b>Regional average   Moyenne régionale</b>	<b>5.85%</b>	<b>\$6,504,663</b>	<b>\$7,397,354</b>	<b>13.72%</b>
<b>National average   Moyenne nationale</b>	<b>12.07%</b>	<b>\$9,969,112</b>	<b>\$11,474,698</b>	<b>15.10%</b>



eBOUND  
C A N A D A

## **EBOOK COLLECTION PRACTICES**

A Report to the Canadian Publishing Community  
on Trends and Issues in Canada's Public,  
University, and College Libraries

Ken Roberts  
Carol Stephenson  
Thomas Guignard

eBOUND Canada August 2015

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# UNIVERSITY LIBRARIES

## The Network of University Libraries in Canada

Universities are a \$30 billion-a-year enterprise in Canada, generating over \$12.4 billion in research activities in 2014. In 2013, 46,000 full-time professors at the ninety-seven public and private not-for-profit universities provided undergraduate and graduate programs to 1.7 million students.<sup>17</sup> There are at least twenty-five universities that provide programs in French.<sup>18</sup> Appendix A provides a list of universities with enrolment figures for 2014.

According to the Canadian Association of Business Officers (CAUBO) 2012-2013 annual statistical report, ninety-eight reporting university libraries spent more than \$326,786,000 on library acquisitions in 2012 (Table 6). Note that while there are 106 total institution names listed in this report, there are fewer reporting because affiliated university college financials are typically reported under the primary institution.

**Table 6.** The number of universities in each province with full-time equivalent (FTE) combined undergraduate and graduate student enrolments, total library acquisition expenditures for all institutions, and individual library acquisition budget ranges.<sup>19</sup>

Institution	Total schools	2012 Under 10,000 FTE	2012 Over 10,000 FTE	Total 2012 Library Acquisition Expenditures	2012 Less than \$1M	2012 \$1 to \$5M	2012 \$5 to \$10M	2012 More than \$10M	2012 No info
Alberta	9	5	4	\$34,996,000	3	3	1	1	1
British Columbia	11	6	5	\$39,802,000	4	3	1	2	1
Manitoba	5	4	1	\$12,317,000	2	1	0	1	1
New Brunswick	4	3	1	\$6,385,000	1	2	0	0	1
Newfoundland	1	0	1	\$8,530,000	0	0	0	1	0
Nova Scotia	11	10	1	\$10,963,000	8	2	1	0	0
Ontario	39	26	13	\$138,021,000	19	8	5	4	3
Prince Edward Island	1	1		\$912,000	1	0	0	0	0
Quebec	19	13	6	\$59,870,000	10	5	2	2	0
Saskatchewan	6	4	2	\$14,990,000	3	1	0	1	1

17 Universities Canada website (formerly Association of Universities and Colleges of Canada) <http://www.univcan.ca/canadian-universities/our-universities/>

18 Universities Canada University Study website <http://www.universitystudy.ca/>

19 CAUBO. (2012-2013). *Financial Information of Universities and Colleges Report*. Retrieved from <http://www.caubo.ca/resources/publications/fiuc/caubo-2012-2013-financial-information-universities-and-colleges>

University libraries are also members of larger consortia groupings that work collectively to provide cost effective services and electronic collections to their users. In Canada, the university libraries belong to one of the four academic regional consortia: Le Bureau de coopération interuniversitaire (BCI), Council of Atlantic University Libraries (CAUL), Council of Prairie and Pacific Libraries (COPPUL), and the Ontario Council of University Libraries (OCUL).<sup>20</sup> There are eighteen institution members in BCI that includes all the university libraries in Quebec. The fifteen Atlantic province universities are included in CAUL. COPPUL includes twenty-three full member universities from British Columbia, Alberta, Saskatchewan, and Manitoba. OCUL includes the twenty-one institutions in Ontario. Institutions license electronic resources within their regional consortia, with the exception that COPPUL also provides some licensing support for the larger CAUL libraries.

Seventy-five universities are also members of the Canadian Knowledge Research Network (CRKN) national consortia organization that handles licenses that have broad interest to all Canadian universities.<sup>21</sup> There is also a number of additional smaller provincial, subject-focused or regional multi-sector consortia in which universities may participate for specific electronic resource licenses. Most of the library consortia in Canada also cooperate in the multi-sector informal group called Consortia Canada that does licensing on behalf of other consortia. Consortia Canada is a potential group to partner with for high-level cross-sector discussions about Canadian content for public, college, and university libraries. Consortia Canada is unique in that individual institutions are not direct members of Consortia Canada.<sup>22</sup> The heads of all the Canadian Consortia also participate in the International Coalition of Library Consortia (ICOLC).<sup>23</sup> ICOLC is an important forum to discuss ideas and expand library/publisher partnerships beyond Canada.

Libraries that are affiliated with research universities can also apply for membership in the Canadian Association of Research Libraries (CARL) and the American Research Libraries (ARL). There are twenty-nine university libraries in CARL and fifteen university libraries in ARL.<sup>24</sup> These organizations act as advocates on behalf of research libraries in national and international policy and technology discussions. These organizations would be potential partners with publishers to advocate to government for policy changes to funding programs.

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20 Le Bureau de coopération interuniversitaire (BCI) website. <http://erpac.crepuq.qc.ca/eetc.html>

Council of Atlantic University Libraries (CAUL) website. <http://www.caul-cbua.ca/>

Council of Prairie and Pacific Libraries (COPPUL) website. <http://www.coppul.ca>

Ontario Council of University Libraries (OCUL) website. <http://www.ocul.on.ca>

21 Canadian Knowledge Research Network (CRKN) website. <http://crkn.ca/>

22 Consortia Canada website. <http://www.concan.ca/>

23 ICOLC website. <http://icolc.net/>

24 Association of Research Libraries (ARL) website. <http://arl.org>

Canadian Association of Research Libraries (CARL) website. <http://www.carl-abrc.ca/>

## Survey

In order to learn more about the role of ebooks and print books in Canadian college and university libraries, the eBOUND team compiling this report created a web-based survey to ask academic librarians about future directions for ebooks, ebook functionality requirements for librarians and users, and details on acquisition of ebooks. The eBOUND Canada Electronic Books web-based survey (eBOUND Survey) was sent to university libraries who were members of the regional consortia (BCI, CAUL, COPPUL, OCUL). In addition, CRKN also sent the survey email invitation to all their members. College consortia and direct email was used to distribute the survey to college libraries. The survey ran from April 2 to May 4, 2015. Aggregated, anonymized feedback from the twenty-five university library respondents is referenced throughout this university section as the eBOUND Survey.<sup>36</sup>

When asked about ebook budgets in the eBOUND Survey, few libraries are able to provide specific budget figures, but comments indicate that at least half of the respondents (n=25) plan to increase budgets for ebooks this fiscal year. Most libraries do not split budget lines for print or electronic books. *Library Journal's* 2011 ebook survey reported a 93% increase in ebook collections in academic libraries since 2011.<sup>37</sup> Since the 2011 figure was relatively low, the percentage increase sounds higher than the actual dollars involved.

Comments from the eBOUND Survey highlight the factors affecting expenditures on ebooks:

- “Our policy is to be e-preferred, so we will continue to spend an increasing amount on ebooks.”
- “One budget line buys approval books in print, PDA ebooks, and title-by-title selections that can be [electronic] or print. So we may increase or decrease the amount spent on ebooks next fiscal.”
- “Currency exchange and inflation on subscriptions [are factors affecting ebook expenditures]. The vast bulk of our total acquisitions budget is spent on year-over-year subscriptions. For many years we have had flat library budget allocations from our institution, and inflation eats away at our spending power every year. We manage this by cancelling subscriptions and buying fewer one-time resources.”
- “Leased ebooks are supported unless a consultation to cancel takes place. Each selector decides what to purchase with monograph money: print books, ebooks, ebook packages.”

36 eBOUND Canada. (April 2015). *eBOUND Canadian Electronic Books Survey*. Unpublished Web survey to Canadian University and Colleges Libraries. [Note: There were Twenty-five responses from universities. This survey is referred throughout this document as the “eBOUND Survey”].

37 Miller, R. (October 12, 2011). Dramatic Growth: LJ's Second Annual Ebook Survey. *The Digital Shift*. <http://www.thedigitalshift.com/2011/10/ebooks/dramatic-growth-ljs-second-annual-ebook-survey/>

The summary of format preferences from the eBOUND Survey highlights mixed views on moving to electronic formats (Table 7). While there is a definite shift to electronic, the number of institutions responding with “no preference” or “depends” comments when asked about preference for electronic or print indicate that libraries are still very much in a hybrid print/electronic acquisition situation. Comments also indicate that while ebooks may be preferred, factors such as DRM that impacts usability and access, high ebook pricing compared to the print, and print and electronic formats not being released simultaneously are factors that might push libraries to purchase print instead of electronic. Children’s books and other image intensive books are still preferred in print. One library also responded that Canadian literature is purchased in both print and in electronic format.

**Table 7.** eBOUND Survey responses to the question “Does your library have a format preference for different types of books” expressed as a percentage of the total responses for each format (n=25).

Type of Book	Print	Electronic	No Preference	Depends	Don't typically purchase
Academic	4%	38%	23%	35%	0%
University Press	4%	35%	27%	34%	0%
Canadian university press	0%	40%	32%	28%	0%
Textbooks	4%	31%	15%	8%	42%
French language books	0%	31%	31%	15%	23%
Childrens books	46%	4%	4%	8%	38%
Canadian childrens books	48%	0%	12%	8%	32%
Technical books	0%	38%	23%	23%	16%
Canadian technical books	0%	35%	31%	23%	11%
Popular reading books	27%	8%	15%	8%	42%
Canadian popular books	48%	0%	12%	8%	32%

## Vendors

Competition to protect market share and even to dominate the ebook platform market has seen significant change this year over the past year. ProQuest, which owns rights to the EBL and ebrary systems, will be releasing a new integrated platform, called ProQuest Ebook Central.<sup>38</sup> ProQuest will also now own the rights to the MyiLibrary book platform offered by Coutts. EBSCO owns their own ebook platform and purchased the collection of ebooks originally offered through the now defunct NetLibrary platform.

<sup>38</sup> ProQuest. (January 30, 2015). *ProQuest Brands New Integrated Book Platform: ProQuest Ebook Central*. [Press release]. Retrieved from <http://www.proquest.com/about/news/2015/ProQuest-Brands-New-Integrated-Ebook-Platform—ProQuest-Ebook-Central.html>

Patron-Driven Acquisition (PDA), also referred to as Demand-Driven Acquisition (DDA), isn't typically offered by publishers providing ebooks on their own platforms but is a model offered by the aggregator platforms. MARC records for collections of titles that fit broad parameters identified by librarians are loaded into the library catalogue. The user interacts with the ebooks on the aggregator's platform without being aware that the library has not yet permanently licensed the content. ebrary, EBL, MyiLibrary, and EBSCOhost all offer PDA programs with different business models that measure when user interaction with an ebook triggers an ebook purchase. Short-term loans (STL) are a variation on PDAs in which libraries rent access for users, paying between 5% and 30% of the cost of the title price. A number of STLs may ultimately trigger a purchase of the ebook. Non-linear lending is a unique model to EBL which provides 325 one day STLs to a book every year. A number of publishers are now backing out of STLs because their ebooks are not getting sufficient use to trigger a purchase. The University of California Press experienced 51% of their ebook use in PDAs as STLs, but only 2% of the STL books triggered a purchase.<sup>42</sup>

While PDA with its various iterations is controversial,<sup>43</sup> 70% of the university libraries responding to the eBOUND Survey use PDA and of those, over 50% use it as a complementary strategy, 20% use it as their primary means to select individual ebooks, and 26% are experimenting in a pilot stage. Because publishers often embargo releasing frontlists to PDA programs, libraries wanting to ensure current title access from key publishers will need to integrate PDAs with other acquisition strategies. Canadian libraries are working with EBL, ebrary, EBSCOhost, MyiLibrary, and JSTOR and using YBP and Coutts to manage PDA programs. PDAs on a consortia level are still in the experimental stage in Canada, but it is on the horizon to expand as more libraries use PDAs consistently at the local level. The Novanet consortium of Nova Scotia libraries 2012 PDA<sup>44</sup> was viewed as highly successful by the libraries involved, providing users with over 20,000 titles, with only forty seven books purchased and 4,152 STLs totaling \$60,000. By contrast, the 2010 PDA pilot by OCUL, without any STL component, resulted in over \$150,000 spent and 500 titles purchased in a month's access to 40,000 titles.<sup>45</sup>

## Collections

The variety of collections options and platforms presents librarians with a vast, complex and impossibly varied list of "slice and dice" subscription and purchase options to select collections by year, publisher, and subject. The large academic publishers host their own content on their own platforms, scholarly publisher aggregations have developed collections of presses on their own platforms, and commercial aggregators continue to evolve their business models and compete for content supremacy.

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42 Michael Zeoli, Vice President, YBP Strategic eContent Development and Partner Relations, personal communication. April 27, 2015.

43 Anderson, R. (May 31, 2011). What Patron-Driven Acquisition (PDA) Does and Doesn't Mean: an FAQ. *The Scholarly Kitchen*. <http://scholarlykitchen.sspnet.org/2011/05/31/what-patron-driven-acquisition-pda-does-and-doesnt-mean-an-faq/>

44 Slaunwhite, B. et al. (February 2014). *Novanet DDA Final Report*. Retrieved from [http://aleph2.novanet.ns.ca/NovanetDDAReport\\_Final.pdf](http://aleph2.novanet.ns.ca/NovanetDDAReport_Final.pdf)

45 Davidson, C. and T. Horava. (May 16, 2011). *A Leap of Faith: A Consortial PDA Pilot Project*. Presented at the Acquisitions Institute at Timberline Lodge. Retrieved from <http://www.slideshare.net/TonyHorava/acquisitions-institute-2011-ocul-pda-project>

The majority of university library respondents to the eBOUND Survey were acquiring a variety of collections from scholarly presses, publisher direct collections, and aggregated collections of academic content from commercial sources. At this point, there is no single dominant ebook aggregator or collection model. The majority of respondents were acquiring collections from Springer (22 of 25 respondents) and the Canadian Electronic Library (23 of 25). More than half of the respondents acquired subscription packages including PsycBOOKs, Safari, 24x7, Knovel, ABC-Clio, and the ACLS Humanities Ebook project. ProQuest's ebrary interface was the commercial aggregator platform used by more institutions than ProQuest's EBL, Coutt's MyiLibrary, or EBSCOhost books.

For Canadian university press publishers, the developments in the scholarly publisher environment present good examples of partnerships that university libraries have trusted with providing quality content, good platforms, and openness to discussion of models to meet publisher and library needs. Canadian university libraries acquire content from all these providers. Duke University Press<sup>46</sup> has a longstanding success rate with access to all their content DRM-Free, sustainable pricing, predictable content growth, and options for access or perpetual back-file purchase. The downfall of the other projects is the lack of comprehensiveness of title coverage across participating publishers. Oxford University Press University Press Scholarship Online (UPSO)<sup>47</sup> and Cambridge University Press University Publishing Online (UPO)<sup>48</sup> have established partner press programs on their own ebook platforms. The other two players are Project Muse's University Press Content Consortium (UPCC)<sup>49</sup> which includes Canadian content from universitypublishing.org, the Calgary Institute for Humanities, Presses de l'Université du Québec, University of Ottawa Press, and Wilfrid Laurier University Press and books at JSTOR<sup>50</sup> which includes McGill-Queen's University Press, University of Ottawa Press, and University of Toronto Press. None of the four scholarly aggregators (UPSO, UPO, UPCC, or JSTOR) dominates the scholarly press market at this point.

## Ebook Functionality for Users and Librarians

While ebooks offer the potential to enrich the user's experience with ready access to more content than ever possible in a physical print environment, ebook models that limit full engagement with the content discourage libraries from purchase and users from accepting ebooks. There are a number of key functionalities that librarians need and repeatedly request. (Table 10). It is notable that while the majority of respondents to the eBOUND Survey agree that multiple user access is something they require, they also agree that single or limited user access is strongly undesirable. No other functionalities are identified by the majority of respondents as undesirable or not important. One university library

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46 Duke University Press. eDuke Books Scholarly Collection website. <http://read.dukeupress.edu/>

47 Oxford University Press. University Press Scholarship Online website. <http://www.universitypressscholarship.com>

48 Cambridge University Press. University Publishing Online website. <http://universitypublishingonline.org/>

49 Project Muse. UPCC Books on Project Muse website. <https://muse.jhu.edu/about/UPCC.html>

50 JSTOR. Content on JSTOR: Books website <http://about.jstor.org/content-on-jstor-books>

response from the eBOUND Survey sums up the perceived difficulties of limited access: “the ebook experience has to replicate the [print] book experience as much as possible. Restricted DRM creates barriers and diminishes the end user experience. People engage with books in different ways, especially when they are studying. Let them have the flexibility to use the content in the ways that best suit their needs”. Another comment from this section of the eBOUND Survey presents a common concern about long-term access to ebooks: “Aside from DRM and the end user experience, the biggest problem with ebooks is the issue of preservation. Will the ebooks we purchase still be accessible in 5, 10, 30 years? It may be years before the book finds its audience”. This comment is notable because it highlights the long-term collection ideal toward which academic librarians continue to strive. This goal is increasingly challenging for librarians who work with budget restrictions and a highly fluctuating ebook environment.

**Table 10.** Ranked responses of “required” or “desirable”, from the eBOUND Survey, for a list of functionalities for the end user experience and for librarians to manage and provide access to ebooks.

Functionality for the end-user experience		Functionality for librarians to manage and provide access	
Required	Nice to have	Required	Nice to have
<ul style="list-style-type: none"> <li>• Off-line reading at the chapter level.</li> <li>• PDF format.</li> <li>• Mobile device compliance.</li> <li>• Readable on ebook readers.</li> <li>• Keyword and Boolean search at the ebook title level.</li> <li>• Search functionality within the ebook.</li> <li>• Ability to search ebook content across the entire platform.</li> <li>• Multiple user access.</li> <li>• Printing, downloading, saving allowed at the chapter level.</li> </ul>	<ul style="list-style-type: none"> <li>• Digital book exact format of print book.</li> <li>• Additional multimedia.</li> <li>• Off-line reading of the entire ebook.</li> <li>• ePub format.</li> <li>• XML format.</li> <li>• Printing, downloading, saving allowed for the entire ebook.</li> <li>• Users can add notes to personalize the reading experience.</li> </ul>	<ul style="list-style-type: none"> <li>• ebook and print book released simultaneously.</li> <li>• COUNTER-compliant usage statistics.<sup>51</sup></li> <li>• Ownership and perpetual access rights for purchased books.</li> <li>• Free MARC records.</li> <li>• Accurate title lists.</li> <li>• Ability to post entire ebook on reserve.</li> <li>• Integration into discovery interfaces.</li> <li>• IP address authentication.</li> <li>• Single sign-on.</li> <li>• Accessible formats for all types of users.</li> </ul>	<ul style="list-style-type: none"> <li>• Interlibrary loan allowances.</li> <li>• Data and text mining rights.</li> <li>• Digital Object Identifiers (DOIs) at the title level.</li> <li>• DOIs at the chapter level.</li> </ul>

When the eBOUND Survey respondents were asked to recommend examples of platforms with a good end user experience, the majority identified Springer and Project Muse. The following table highlights the features Project Muse ebooks (Table 11) that are favored by respondents. Conversely, when asked to identify examples of problematic platforms from the end user experience perspectives, the majority of respondents identified ebrary collections and the titles in the ACUP collection on Scholars Portal that have limited user access and use plug-ins to limit access.

51 COUNTER compliant usage statistics are a set of standards for recording and reporting of online usage statistics for books, journals, and databases in a consistent, credible and compatible way Project Counter website. <http://www.projectcounter.org/faqs.html>

**Table 11.** Features list of the UPCC Books on Project Muse<sup>52</sup>

- Unlimited simultaneous usage of book content, with no DRM and no restrictions on printing or downloading.
- Digital book released at the same time as the print book.
- Ownership and perpetual access rights for books purchased.
- Books in PDF format.
- Books searchable and retrievable to the chapter level.
- COUNTER-compliant usage statistics.
- Free MARC records for all books.
- Books fully integrated on the MUSE platform with the ability to search across combined book and journal content or limit searches by content type.

## Promoting Canadian Content for University Collections

The majority of university library respondents to the eBOUND Survey purchase print and electronic title-by-title Canadian ebook content through approval plans with Coutts and YBP, Renaud-Bray, and on aggregator platforms including EBSCOhost, JSTOR, and Project Muse. For Canadian publishers, it seems vital that print and ebook content be profiled with the major approval book vendors (YBP and Coutts) to gain exposure and to ensure integration into the workflows and processes university libraries are using for identification, selection, and purchasing of books. YBP reports that they have profiles of over 11,700 Canadian books from university presses worth almost \$860,000 USD (2013-2014). Canadian University Presses represent 6% of the total titles from North American University Presses profiled by YBP during the same time period.

When asked about models or partnerships for the Canadian publishing industry to explore, university library respondents to the eBOUND Survey identify working with YBP and Coutts and with content delivery platforms from EBSCO, MyiLibrary, ProQuest's EBL and ebrary, Project Muse, JSTOR, and Oxford University's UPSO. Respondents are not suggesting that content be delivered through all these various platforms but emphasize that consolidation of all content on a common platform would simplify workflow, licensing, discovery, and use. One university library respondent from the eBOUND Survey notes: "I would like to see a comprehensive collection of Canadian ebooks available for acquisition (preferably via a PDA model), on one of the vendor's offered platforms.... This would reduce inadvertent duplication of titles, and the proliferation of ebook interfaces (libraries have too many ebook interfaces—confusing for users)."

Exploring partnerships with OCUL's Scholars Portal ebook platform was also recommended. Scholars Portal is a technology infrastructure, based at the University of Toronto Libraries and supported by the universities in Ontario, that provides locally developed platforms to archive and provide access to ebooks, ejournals, and data licensed for perpetual ownership and local hosting by Ontario universities and partners. Libraries purchase perpetual access through publisher or aggregator ebook platforms but also license with the provider to receive the full text of ebooks and associated metadata

<sup>52</sup> Project Muse. UPCC Books on Project Muse Collection Features and Title Lists. Accessed May 28, 2015. [https://muse.jhu.edu/about/UPCC.html#title\\_lists](https://muse.jhu.edu/about/UPCC.html#title_lists)



## The ACUP/APUC 2017 DIGITAL COLLECTION

ACUP/APUC (Association of Canadian University Presses/Association des Presses Universitaires Canadiennes) and eBOUND Canada, in partnership with CRKN (Canadian Research Knowledge Network), are pleased to present the **ACUP/APUC 2017 Digital Collection**.

Featuring award-winning and cutting-edge scholarship, the **ACUP/APUC Digital Collection** is a critical resource for every Canadian student, researcher, and scholar involved with, and interested in, the **social sciences** and **humanities**.

ACUP/APUC and its 17 member presses offer **perpetual access ebook licenses for more than 10,000 titles**, in both **French and English**, in this uniquely comprehensive collection.

“Offering Canadian content and research outputs that are Canadian in nature is very important for our institutions and a crucial part of the librarian profession.”

**GUYLAINE BEAUDRY**  
University Librarian, Concordia University

Professional librarians and institutions **save time and money while supporting Canadian scholarly works:**



**SCALE**



**VALUE**



**ACCESS**



**EASE**

**And then there's quality, vision, and transformative scholarship.** Whether working with new authors or more established scholars, the books published by ACUP/APUC member presses undergo rigorous peer review to ensure that their transformative ideas and research are presented in a clear and engaging narrative form set out with illustrative material of flawless quality to provide a visual whole of fine design in print and digital formats. The collection brings to your readers the very best of Canadian scholarship—award-winning books and brilliant authors. These include, as just several examples among thousands:

- *Lament for a Nation* by George Grant
- *Société et politique, la vie des groupes* by Léon Dion
- *L'eau et ses enjeux* by François Ancil
- *Silent Surrender* by Kari Levitt
- *On Being Here to Stay* by Michael Asch
- *Introduction aux relations internationales* by Diane Éthier

**28 Canadian universities, large and small have already signed on, increasing the reach of peer-reviewed scholarly research in Canada to all students and faculty across the country.**

## BENEFITS OF THE ACUP/APUC 2017 DIGITAL COLLECTION



### SCALE

Immediate access to more than **10,000 titles**, top peer-reviewed digital scholarly publications including **600 new digital works each year**.

Over 300,000 students and faculty have access to Canada's scholarly publishing record: nearly every single digital book produced by ACUP/APUC publishers.



### VALUE

Exceptionally competitive pricing, offered for backlist, current, and frontlist bundles.

Scalable pricing ensures that large and small institutions benefit from extraordinarily deep discounts.

**Among 75 eligible universities, 71% enjoy rebates of at least 80% off the list price on parts of the collection.**

Canadian dollar transactions provide better value and budget control without foreign exchange risk.



### ACCESS

**CRKN is the single point of contact** to sign on to the offer and conveniently access the collection via **Scholars Portal**, a known, trusted and secure source for scholarly research.

Peace of mind that virtually 100% of the digitized content is included which eliminates the piecemeal approach of sourcing individual titles.



### EASE

Each year, DRM protocols are adjusted to convert an additional 10% of the collection to multi-user or open-access status.

Previously unavailable titles are digitized every year as deep backlist French- and English-language collections.

**CRKN IS TRULY THE BEST VEHICLE FOR LIBRARIANS, ACUP/APUC AND EBOUND, A GENUINE TIME AND MONEY SAVER.**



**SIGN ON or LEARN MORE**

Visit [www.crkn-rcdr.ca](http://www.crkn-rcdr.ca) and log in to the offer page to download the ACUP/APUC 2017 Canadian Digital Collection including the pricing program.

To confirm your participation:

1. **Complete the Financial Commitment Form**
2. **Email to [form@crkn.ca](mailto:form@crkn.ca) before January 20, 2017**

For specific enquiries about your institution's preferred pricing:  
**Download the OFFER from [www.crkn-rcdr.ca](http://www.crkn-rcdr.ca)**

Find out more about the 2017 ACUP/APUC Digital Collection:  
**Contact Craig Olsvik at CRKN**

[colsvik@crkn.ca](mailto:colsvik@crkn.ca)

613-907-7033

### A PAN-CANADIAN PARTNERSHIP

**ACUP/APUC and eBOUND have partnered for the last three years with CRKN** to provide this exclusive digital offer to Canadian university libraries. As not-for-profit organizations, we do not share the same profit objective as large, multinational commercial publishers and, being owned by Canadian universities, the money spent on the collection is returned to the universities here. We advance the mission to build a national scholarly literature to assist young scholars and first-time authors present their research in substantive and high-quality editorial form; and to ensure that audiences both within and outside of the academy have as broad access as possible to the intellectual vitality of this country's researchers and scholars.



## ***A New Partnership Benefits Smaller Libraries and Canadian Scholarly Presses***

*10 December, 2014*

The Ontario Council of University Libraries (OCUL), eBOUND Canada, and the members of the Association of Canadian University Presses/Association Des Presses Universitaires Canadiennes (ACUP/APUC) are very pleased to announce that a partnership agreement has been struck that will bring Canadian scholarly content to six more Ontario university libraries: Trent University, Algoma University, Royal Military College of Canada, OCAD University, Laurentian University, and Lakehead University.

Following on the heels of the innovative and successful agreement reached with ten OCUL library members in February 2013, this further venture ensures that libraries with less than 10,000 student FTEs will be able to provide their students, faculty and staff with digital access to a significant number of books on Canadian topics in the social sciences and humanities. The agreement, covering a range of French and English works published between 2006 and 2016, emulates the previous deal by offering perpetual ownership and local hosting rights on the Scholars Portal Books platform.

Laurentian's Chief Librarian, Brent Roe observes **"This deal is important for a smaller Canadian university such as Laurentian. It makes considerable "Canadian content" available to our students and faculty, a greater proportion of whom work from a specifically Canadian perspective in their disciplines than in a larger university. Without a deal that takes our smaller budget into consideration, we just wouldn't have online access to much of this excellent scholarship."**

Nearly two years after the original deal was struck, usage statistics reveal how valuable the collection has been to the participating university libraries and their communities. From January to September this year 24% of the most-used titles on the Scholars Portal Books platform were from the ACUP collection. This is impressive given the ACUP collection comprises only around 2% of the entire list of commercial titles available on the platform.

OCUL Chair, Vice Provost and University Librarian at Queen's University, Martha Whitehead comments **"We are very happy to see the success of this partnership with ACUP/APUC and eBOUND Canada. This collection is clearly important to our communities. OCUL is delighted to be expanding access even further with this latest agreement, connecting more of Ontario's students and researchers with Canadian scholarship through Scholars Portal."**

Since 2013, this collection has grown to around 6,000 titles. The collection is now available to an additional **44,000 students and staff** at the seven participating libraries through Scholars Portal Books, which will continue to be the exclusive point of access.

ACUP/APUC President John Yates comments, **"We are very pleased we have reached an agreement, through OCUL, with university libraries that may not otherwise have the resources to purchase this breadth of material and now are able to provide their patrons with easy access to an exciting range of Canadian university press e-books. Our members produce excellent works, the fruit of intense editorial collaboration with this country's foremost established and emerging scholars. To add another 44,000 students and staff to the 290,000 users currently able to access the collection is an encouraging step in building a comprehensive cross-country partnership between all university libraries and all Canadian scholarly presses."**

eBOUND Canada is similarly delighted with the partnership. **"Ensuring that Canadian-produced ebooks are widely available and easily accessed by readers is central to eBOUND's mission,"** says eBOUND Chief Executive Officer, Krys Ross. **"We are delighted to partner with ACUP and OCUL in bringing these works**

to the Scholars Portal platform and to aid them in meeting their commitment to their communities. Our common goals have allowed us to expose this comprehensive collection to the maximum number of readers in an almost perfect marriage of technology and content.”

\*

***About the Ontario Council of University Libraries (OCUL)***

[www.ocul.on.ca](http://www.ocul.on.ca)

OCUL is a consortium of Ontario’s 21 university libraries. Its strength lies in its commitment to work together to maximize collective expertise and resources. OCUL enhances information services in Ontario and beyond through collective purchasing and shared digital information infrastructure, collaborative planning, advocacy, assessment, research, partnerships, communications, and professional development.

For further information contact **Kathy Scardellato**, OCUL Executive Director  
E: [kathy.scardellato@ocul.on.ca](mailto:kathy.scardellato@ocul.on.ca) P: 416-946-0578

***About OCUL’s Scholars Portal***

[www.scholarsportal.info](http://www.scholarsportal.info)

Scholars Portal is a service of the Ontario Council of University Libraries (OCUL). The Scholars Portal technological infrastructure, including the Scholars Portal Books platform, preserves and provides access to information resources collected and shared by Ontario’s 21 university libraries. Through the Scholars Portal online services, Ontario’s university students, faculty and researchers have access to an extensive and varied collection of e-journals, e-books, social science data sets, geo reference data and geospatial sets. Scholars Portal also supports the online inter-library loan platform for Ontario’s universities and provides support for a virtual chat reference service and other tools designed to aid and enhance academic research in Ontario. Scholars Portal continues to respond to the research needs of Ontario universities through the creation of innovative information services and by working to ensure access to and preservation of this wealth of information.

***About the Association of Canadian University Presses (ACUP/APUC)***

[www.acup.ca](http://www.acup.ca)

The Association of Canadian University Presses/Association Des Presses Universitaires Canadiennes exists to serve the interest of Canadian scholarship. By their publishing activity, ACUP/APUC members encourage the broadest distribution of the fruits of research and scholarship. The ACUP/APUC provides an organization through which the exchange of ideas relating to university presses and their functions may be facilitated.

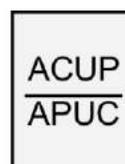
For further information contact **John Yates**, President, Publisher, and Chief Executive Officer, University of Toronto Press, E: [jyates@utpress.utoronto.ca](mailto:jyates@utpress.utoronto.ca) P: 416-978-2239, ext. 222

***About eBOUND Canada***

[www.eboundcanada.org](http://www.eboundcanada.org)

Launched in 2009, eBOUND Canada, formerly the Canadian Publishers Digital Services (CPDS) arm of the Association of Canadian Publishers, is a not-for-profit organization dedicated to advancing Canadian publishers’ engagement in the digital marketplace. Its growing number of programs includes ebook distribution, digital asset management, conversion services and professional development. eBOUND acknowledges the financial support of the government of Canada through the Canada Book Fund and the Ontario Media Development Corporation on behalf of the Ministry of Tourism and Culture.

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# Canadian Universities and Sustainable Publishing (CUSP)

A White Paper

Prepared on behalf of the Canadian Association of Research Libraries (CARL)  
by Martha Whitehead and Brian Owen

February 22, 2016

## Introduction

The scholarly communications landscape in Canada is on the cusp of transformative change. Many factors are converging: the continuing impact of digital technology on teaching and research, the growing expertise of academic libraries in utilizing and supporting technology-based initiatives, the move towards policies of open access, the oligopoly of international academic publishers and the financial constraints of university budgets.

In Canada and worldwide, universities need to decide how best to invest in scholarly communications to support research today. The purpose of this paper is to outline the issues and potential paths forward, for discussion and planning with researchers and administrators of Canadian universities, in the international context. Our common goal is to enable research results to be as widely distributed and accessible as possible, internationally, in high quality publishing venues at the lowest possible costs.

*Our common goal is to enable research results to be as widely distributed and accessible as possible, internationally, in high quality publishing venues at the lowest possible costs*

## Developments in scholarly communication in Canada

Twenty years ago this year, the Association of Universities and Colleges of Canada (now Universities Canada) and the Canadian Association of Research Libraries (CARL) issued a report titled *“The Changing World of Scholarly Communication: Challenges and Choices for Canada.”*<sup>1</sup> The report was the work of a joint Task Force on Academic Libraries and Scholarly Communication, formed in 1994 to address the impacts of technology, the economy and other factors on the scholarly landscape. In 2002, CARL issued another paper<sup>2</sup> analyzing the situation at the time and making the case for further research into scholarly communication in Canada, and this led to a full and still pertinent study and 2005 report titled *“Towards an Integrated Knowledge Ecosystem: A Canadian Research Strategy.”*<sup>3</sup>

There have been many developments in Canada since these calls for action, including:

### National consortium purchasing: Canadian Research Knowledge Network

In 1999, CARL led in the development of a successful proposal to the Canada Foundation for Innovation for the Canadian National Site Licensing Project (CNSLP), which then became the Canadian Research Knowledge Network (CRKN) in 2004. A critical aspect of CNSLP/CRKN

<sup>1</sup> AUCC-CARL/ABRC, “The Changing World of Scholarly Communication: Challenges and Choices for Canada” (Final report of the AUCC-CARL Task Force on Academic Libraries and Scholarly Communication, October 1996).

<sup>2</sup> Kathleen Shearer and Bill Birdsall, “The Transition of Scholarly Communications in Canada” (discussion paper, 2002).

<sup>3</sup> Kathleen Shearer and Bill Birdsall, “Towards an Integrated Knowledge Ecosystem: A Canadian Research Strategy” (Report submitted to CARL, 2005).

was the strategy to collaborate across jurisdictions, bringing together universities in Canada across ten provinces, two official languages and diverse degree and program offerings. The objectives were: to increase the quantity, breadth and depth of scholarly content available to academic researchers throughout Canada; to speed the transition from print-based to digital and value-added forms of scholarly content; and to leverage Canadian universities' buying power and influence in the international scholarly publishing marketplace, achieving advantageous terms and conditions for usage and developing new business and service models.<sup>4</sup> CRKN has had many successes, for example greater control of license agreements through creation of a model license. The consortium now has 75 Canadian university members and manages 54 licenses with key academic publishers.

### National advocacy initiatives

CARL and CRKN have undertaken a wide range of advocacy, consultation, and support activities to inform key stakeholders on scholarly communication topics, especially open access and its implications for scholarly publishing. In addition to reports<sup>5</sup> and position statements,<sup>6</sup> CARL has assembled resource kits<sup>7</sup> and other supports<sup>8</sup> to assist members of both organizations in advancing awareness at the institutional level on these topics. CRKN has also undertaken projects such as the Integrated Digital Scholarship Ecosystem (IDSE)<sup>9</sup> initiative to address the ongoing transformative changes in this sector. In January 2016 CRKN released an Institutional Mobilization Toolkit to assist libraries in moving forward discussions at their institutions on challenges with the cost and availability of research resources.<sup>10</sup>

### Publishing Platforms and Projects

#### Érudit

Érudit began as a pilot project in 1998 and in 2004 became a multi-university consortium comprising the Université de Montréal, the Université Laval and the Université du Québec à Montréal. Érudit supports mostly, but not only, French-language scholarly publications, including journals, books and proceedings, theses and

<sup>4</sup> "About," CRKN, accessed January 25, 2016, <http://crkn.ca/about/history>.

<sup>5</sup> "Implementing Open Access: Report of the CARL-CRKN Open Access Working Group," October 19, 2012, accessed January 29, 2016, [http://www.carl-abrc.ca/uploads/SCC/oawg\\_final\\_report\\_121018.pdf](http://www.carl-abrc.ca/uploads/SCC/oawg_final_report_121018.pdf)

<sup>6</sup> "CARL Position Statement on Open Access," accessed January 29, 2016, <http://www.carl-abrc.ca/en/scholarly-communications/carl-position-statement-on-open-access.html>

<sup>7</sup> "CARL Open Access Advocacy Toolkit," accessed January 29, 2016, <http://www.carl-abrc.ca/en/scholarly-communications/carl-open-access-advocacy-toolkit.html>

<sup>8</sup> "CARL Tri-Agency Open Access Policy on Publications: Quick answers! May 2015," accessed January 29, 2016, [http://www.carl-abrc.ca/uploads/SCC/TriAgency\\_OA\\_Policy\\_Talking\\_Points\\_EN.pdf](http://www.carl-abrc.ca/uploads/SCC/TriAgency_OA_Policy_Talking_Points_EN.pdf)

<sup>9</sup> "About IDSE," CRKN, accessed January 25, 2016, <http://crkn.ca/about/strategic-planning/strategic-plan-2013-2016/integrated-digital-scholarship-eco-system/about-idse>.

<sup>10</sup> "CRKN Institutional Mobilization Toolkit," CRKN, accessed January 29, 2016, <http://crkn.ca/imtj>

## Summary Report: @Risk North (Collections en péril)

November 10, 2017 – Ottawa, Ontario

### Leveraging shared resources & expertise to preserve print research collections

As libraries witness increasing demand for online resources and dwindling circulation of print holdings, while simultaneously confronting budget and space pressures, it can be challenging to remain committed to sustaining academic libraries' print collections. Cooperative approaches to acquiring, storing, preserving, and managing the reduction of print collections are gaining traction, employing a variety of models that seek to distribute the expense and responsibility while creating value for all parties.

The **@Risk North (Collections en péril)** forum, inspired by the Center for Research Libraries' 2016 original [@Risk](#) meeting held in Chicago in April 2016, aimed to allow Canadian academic and national libraries to engage in a strategic discussion around the state of shared print preservation programs in Canada and beyond, from a variety of perspectives, and to begin identifying next steps in national or regional coordination.

A thought-provoking slate of speakers were successful in stimulating fruitful and insightful discussion among those in attendance. What follows is an overview of the presentations and the discussion outcomes.

The organizing committee for this event was comprised of Gwen Bird (Simon Fraser University), Lise Brin and Susan Haigh (CARL), Monica Fuijkschot and Alison Bullock (Library and Archives Canada), Steve Marks and Caitlin Tillman (University of Toronto), and Bernard F. Reilly (Center for Research Libraries).

### Approaching the Long-Term Preservation of Print Documentation: A Current Overview of International Models, Challenges and Opportunities

**Constance Malpas, OCLC**

Over the past ten years, Ms. Malpas and her colleagues at OCLC have collected substantial holdings data about print research collections in the US, Canada and in Europe. By analyzing these data, they have been able to identify some high-risk areas, namely those held outside the "mega-regions" where there is less infrastructure for preservation (40% of Canada's titles), and those held uniquely in a particular country (15% of Canada's titles).

Ms. Malpas's introduction, delivered in fluent and lyrical French, set the stage for an inspired talk that frequently referred to Canada's literary history. Among her many insights, Malpas argued that institutional strategies are becoming increasingly unsustainable, that there is still substantial duplication in the print and digital corpus, and that Canada is well positioned to achieve successful shared

collections by virtue of our existing consortia and collaborative approaches. She argued for having groups commit to registered retention commitments (and having this commitment reflected in individual items' catalogue records), and cautioned us that mid-sized, non-research-intensive libraries can be important collaborators in this work.

Ms. Malpas's main message was clear and powerful: "Effective stewardship of the aggregate resource will require a supra-institutional view of the system wide collection and collective agreements that transcend organizational and even geographic boundaries."

## @Risk and National Coordinated Efforts in Print Preservation in the United States

**Bernard F. Reilly, Center for Research Libraries**

As President of the Center for Research Libraries (CLR) and one of the organizers of the 2016 *@Risk* forum, Bernie Reilly was able to draw on his vast knowledge of shared print programs in the United States and internationally to specifically discuss key issues in the shared preservation of serial collections. Launching a theme that would be picked up throughout the day, he pointed to the inevitability of access and preservation via digital means, and the importance of having a data-driven approach.

Reilly described CLR's five-point shared print agenda for 2017-26 which calls upon the consortium to:

1. Substantially expand the scope and improve the quality of shared collections
2. Merge preservation and electronic access in deep and meaningful ways
3. Create and promote a North American consensus on the scope, norms and standards for print stewardship
4. Forge and formalize new partnerships to achieve greater scale
5. And to articulate a clear and convincing narrative on shared print for scholars and funders.

He astutely noted that "clearing shelves is not an appealing narrative" and proposed viewing shared print preservation through a different lens, one that emphasizes the "new goods" produced by preservation efforts, and promotes sharing of knowledge.

## National Heritage Collections: Perspectives on Mandated Collecting

**Maureen Clapperton (BAnQ) and Monica Fuijkschot (LAC)**

Maureen Clapperton, Director General of the Bibliothèque nationale (BAnQ), launched this session devoted to national libraries' role and approach to preserving research collections. She outlined the means of acquisitions (through legal deposit, voluntary deposit, purchases and donations) and the vital importance placed at BAnQ on the completeness of the historic record. She assured us that BAnQ cares deeply about durability, authenticity, interoperability and re-use. She also noted that BAnQ is keen to participate in a Canadian strategy for effective, non-redundant digitization of last copies.

Monica Fuijschot, Director General, Published Heritage at Library and Archives Canada (LAC), provided an overview of current LAC initiatives that support retention of at-risk print collections; and proposed options for LAC's role in a national context (a topic that was taken up during the table discussions that followed).

A key element of Ms. Fuijschot's presentation were the Six Principles that underlie LAC's last copy print preservation commitment on behalf of Canadians:

1. LAC communicates its willingness to hold last copies of Canadiana;
2. LAC holdings are described in the National Union Catalog;
3. LAC's preservation copies and rare books are held in appropriate preservation environments;
4. Continued availability of print material onsite; LAC will lend material if it is the only institution in Canada that holds it;
5. LAC will hold its Canadiana collection in perpetuity;
6. LAC has historically sought to transfer deselected material to other institutions, and will continue to do so.

Ms. Fuijschot noted that big challenges and questions remain, for example: How do we register last copies? How do we communicate who holds what? How many copies should be preserved? How do we create intelligent workflows that would work in multiple environments?

## Current Canadian Initiatives in Collective Print Preservation

**Scott Gillies, TUG Libraries, Doug Brigham, COPPUL Shared Print Archive Network (SPAN); Caitlin Tillman and Steve Marks, Keep@Downsview, Alan Darnell, OCUL/Scholars Portal**

This session brought together representatives from the regional efforts around shared print preservation and access currently in place within Canada's university network. The presenters, some of whom had never had the opportunity to meet and share lessons learned, gave frank portrayals of their successes, challenges, and lessons learned.

**Scott Gillies** of Wilfrid Laurier University represented the [TriUniversity Group \(TUG\) Annex](#), the oldest of these initiatives, which is shared between Wilfrid Laurier University, University of Guelph, and the University of Waterloo. **Doug Brigham** of the University of British Columbia serves as Coordinator of [COPPUL's Shared Print Archive Network \(SPAN\)](#), which includes twenty participating institutions. **Caitlin Tillman** and **Steve Marks**, both from the University of Toronto, spoke on behalf of the [Keep@Downsview](#) project, a venture shared by the University of Toronto, the University of Ottawa, Western University, McMaster University, and Queen's University. **Alan Darnell** ended the session from his perspective overseeing Scholars Portal's eBook preservation work.

The presenters gave those in attendance important questions and concerns to ponder, namely encouraging institutions to develop integrated print and digital preservation programs, to invest substantially in communications, to aim at finding a balance between redundancy and efficiency, and to create metadata across all collections with a view to someday sharing it.

## Key Takeaways from the Day's Discussions<sup>1</sup>

### National action or coordination

- There is support for a decentralized model with centralized access/coordination, and robust communication.
- There is significant support for LAC's Six Principles (see above). Some suggested that institutions, consortia, or existing shared collections adopt these (or similar) principles.
- When moving into national coordination, it may be useful to shift our thinking from inventory management to planning the knowledge repository for the future research agenda.
- Along with determining priorities, the fundamental objectives, scope and scale will need to be established; there needs to be common language regarding responsibility, commitment, obligation to standard knowledge, outputs, and collections.
- It was suggested that a national effort in terms of Canadiana should be linked to the Canadian National Heritage Digitization Strategy.

### National priorities

- Not surprisingly, the most-often mentioned priority areas were: Canadiana, local (community-generated) content, government publications (all levels), unique and last copies.

### Role for LAC

- Several felt that initially, LAC should prioritize the creation of a union catalogue;
- A number of participants wished to see LAC devote their energy to digitization and access to government documents, including "fugitive" documents;
- There was a fair amount of support for LAC undertaking an overlap study of Canadian research collections (which was suggested during Ms. Fuijschot's presentation);
- Several felt that there is a leadership or governance role for LAC, with some suggesting that there also be a steering committee with representation from major stakeholder groups;
- Several wished to see LAC communicate the importance of collectively managed research collections to the government, with a view to securing funds to coordinate a national strategy and to aid the work being done regionally.

### Role for other organizations including CARL

- The general consensus was that there is a role for other organizations in terms of governance, to help frame LAC's and other organizations' roles, in research and grant funding.
- Organizations or types of organizations named as possible allies: CARL, CRKN, large public libraries, IFLA, academic library consortia, Booknet Canada, galleries, archives and museums, OCLC, publishers, presses, Indigenous language groups and Indigenous publishers.

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<sup>1</sup> These takeaways are based on comments extracted from table discussion notes and from comments expressed during plenary discussion and Q&A periods.

## Next Steps Proposed:

- **Survey the holders of research collections:** launch an overlap study/inventory (LAC's union catalogue will be key element), perhaps including national heat maps; determine capacity (physical and digital storage) across Canada;
- **Continue the dialogue:** set up meeting and/or form a national working group of key stakeholders (e.g. LAC, CRKN, regional consortia, existing initiatives) in order to develop work plan for a national scale initiative and to develop a unified narrative around collective sharing;
- **Build on existing expertise and models:** involve key players already working in this arena in national discussions; build on existing infrastructure; review other successful national initiatives (while remaining cognizant of Canada's unique challenges);
- **Adopt common metadata standards** with a view to future sharing;
- **Look for sources of funding** for national and regional initiatives; identify allies.

# Print Management at “Mega-scale”: A Regional Perspective on Print Book Collections in North America

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Brian Lavoie, Constance Malpas, and JD Shipengrover, for OCLC Research

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what is on hand locally. In contrast, the more similar collections are, the smaller the “gains from trade,” in that access to the collective collection would offer little beyond what is available locally. Of course, substantial operational efficiencies and cost avoidance might still be achieved through some rationalization of duplicative holdings.

Since by definition flow models involve a virtual consolidation of print inventory, good data about local print book collections is essential. Consolidation occurs not at the level of the physical collections themselves, but instead within a layer of services that extends over all collections in the region and permits them to be managed and accessed as a cohesive whole. The service layer will be data-driven, and therefore its ability to present distributed print book holdings as a “regional collection” and offer functionalities operating on that collection—such as support for cooperative collection management decision-making, or region-wide discovery and fulfillment services—will depend on the accuracy and completeness of the underlying data.

The flow model is illustrated by the Borrow Direct partnership between Brown University, Columbia University, the Center for Research Libraries, Cornell University, Dartmouth College, Harvard University, MIT, University of Pennsylvania, Princeton University, and Yale University. Borrow Direct permits faculty and students at each of the partner institutions to easily discover, request, and receive delivery of print books and other materials located at any of the other institutions. Although there are some limitations on cross-institutional borrowing privileges (e.g., one physical volume per request, loan renewal not permitted), users of Borrow Direct benefit from the larger scope and depth of the partners’ collective collection, and the speed with which requested materials can be delivered to the user’s location (Nitecki 2009). Each Borrow Direct institution maintains its own print collection but a layer of services link them together into a virtual collective collection. Greater value is extracted from the collective print investment by making more materials available to more users.

## Mega-regions: A Framework for Consolidation

Given a model of print consolidation, a choice must be made as to the level of aggregation underpinning the consolidation. In other words, how many (and which) institutions will be involved, and where are they located? For the analysis in this report, we chose to examine consolidation at the regional level. Regions tend to be bound together by ties that can both motivate and facilitate interaction between organizations within the region, such as geographical proximity, shared infrastructure, and economic interdependencies. These ties are well-suited to support a print consolidation model based on virtual consolidation and

flows of materials around the system. The logistics of supporting a flow model of print consolidation would likely be simpler and more efficient within a region, in comparison to a grouping of geographically dispersed and disconnected institutions. Moreover, regions seem to be a natural scale of aggregation for print consolidation. Regional clusters of cooperative activity seem to be where current print management initiatives are gravitating: many discussions regarding cooperative print management are organized at the regional level, sometimes involving established regional consortia. For example, a recent *Chronicle of Higher Education* article notes that the WEST project aims to build a “large-scale regional trust for print journal archives,” while “talks are under way about setting up similar regional repositories in the Northeast and Southeast” (Howard 2011).

“Region” is a nebulous term, and can be defined at a variety of scales. We operationalize the concept of a region by adopting the mega-regions framework described by Richard Florida, Tim Gulden, and Charlotta Mellander in the 2008 paper, *The Rise of the Mega-region* (see also Florida 2008). A mega-region is a geographical concentration of population and economic activity, generally subsuming multiple metropolitan areas and their surrounding hinterlands, and linked together through a complex connective tissue of economic interdependency, shared infrastructure, a common cultural history, and other mutual interests. Florida et al. observe that “[t]he mega-regions of today perform functions similar to those of the great cities of the past—massing together talent, productive capability, innovation and markets. But they do this on a far larger scale” (Florida, Gulden, and Mellander 2008, p. 460). In contrast to Thomas Friedman’s idea that the global economy is “flattening,” there are, the authors argue, “a strong set of counter-forces that lead to geographic clustering and the pushing together, so to speak, of economic activity. The mega-region ... is a consequence of this clustering force” (p. 460).

Florida and his colleagues used satellite imagery capturing night-time clusters of lights around the globe to identify twelve mega-regions in the US and Canada (see figure 2). “... [T]he mega-region,” the researchers note, “has emerged as the new ‘natural’ economic unit. The mega-region is not an artifact of artificial political boundaries, like the nation state or even its provinces, but the product of concentrations of centres of innovation, production, and consumer markets” (p. 461).

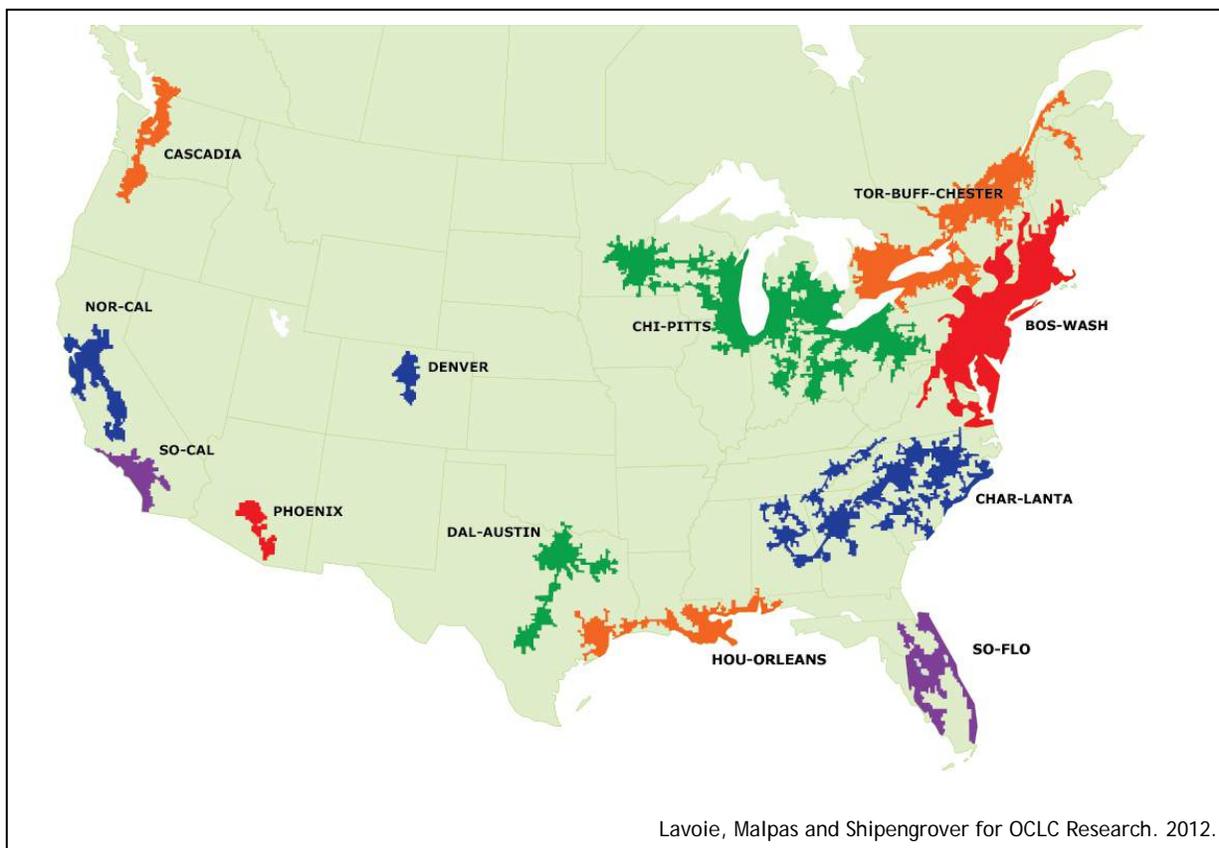


Figure 2. Mega-regions of North America<sup>8</sup>

As figure 2 illustrates, three of the twelve North American mega-regions extend over international boundaries: CASCADIA, CHI-PITTS, and TOR-BUFF-CHESTER. The extent of a mega-region is not limited by political boundaries, but rather by economic and cultural interdependency and mutual interests, which can occur in population centers that straddle an international border—Detroit and Windsor, for example.

Florida and his colleagues identify one mega-region in Mexico, centered around the Mexico City area. While Mexico is also part of North America, we exclude the Mexican mega-region from our analysis, and focus our attention on the remaining twelve US-Canadian mega-regions. The reason is that coverage of Mexican institutions in WorldCat is less extensive than for American and Canadian institutions, and therefore it is not clear that the Mexican presence in WorldCat would be sufficiently representative of the actual Mexican print book collection. For the remainder of the report, references to “North America” should be interpreted to mean the US and Canada only.

8. This visualization of the North American mega-regions, used here and in other graphics in this report, is based on figure 5 in Florida, et al. (2008, 470).

Mega-regions offer a compelling framework within which to think about a regional consolidation of print book collections organized as a flow model—that is, a virtual consolidation of local collections aimed at encouraging a flow of materials around the region. Mega-regions encompass existing networks—both physical and virtual—of integration and mutual interest that could potentially absorb and support a new network of cooperative print management and shared use. As we will show below, the vast majority of the overall North American print book collection is clustered within the twelve mega-regions. In this sense, mega-regions might be a “natural unit of analysis” for cooperative print management, as well as other cooperative library activities. Finally, mega-regions represent clusters of activity—research, innovation, learning, arts, and commerce—that library collections support. Therefore, it is useful to align clusters of library resources with clusters of activities that make use of these resources.

In a sense, the North American mega-regions illustrated in figure 2 are a snapshot, in that mega-regions are not static entities but instead grow and change over time. The boundaries of the twelve mega-regions in figure 2 will likely evolve in ways that absorb parts of the hinterlands surrounding the regions. Moreover, new mega-regions may form in areas where growing economic integration and other factors serve to bind people, institutions, and activities more closely than before. These dynamics will be at work not only in mega-regions, but almost any regional framework. From the standpoint of cooperative print management, the key implication is that regional boundaries will be in flux, likely resulting in the periodic appearance of new partners and an attendant need to adjust regional cooperative arrangements.

While the mega-regions framework is a useful and convenient tool for illustrating and analyzing regional consolidation of print collections, we are not necessarily advocating mega-regions as the appropriate scale for achieving consolidation and cooperative management in practice. Assuming that regions are in fact the natural unit of consolidation, the scale at which regions are defined will depend on a host of factors, including but not limited to the location of logistical networks, existing cooperative structures and agreements, and political jurisdictions (e.g., state or provincial boundaries). Mega-regions are one of many possible forms in which regional print consolidation can be manifested; careful analysis of the alternatives will help planners arrive at the most suitable choice for their circumstances.

Finally, as figure 2 makes clear, there is considerable space *between* the mega-regions. We do not imply that this space is “empty” or unimportant. In fact, the space between the regions—and more specifically, the aggregation of print books located there—has interesting characteristics in its own right, with important implications for cooperative print management and shared use. We discuss the areas outside the mega-regions in detail later in the report.

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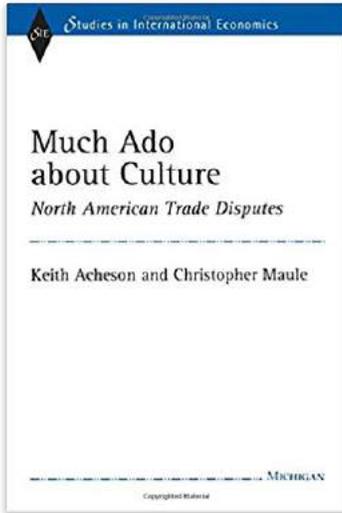
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In Canada, the audio-visual and print industries are referred to as the cultural industries, whereas the United States calls them the entertainment industries. These language distinctions are accompanied by different domestic policies and political discourses. The United States has relatively open policies toward these activities, while Canada has adopted an inward-looking approach. Failure to integrate cultural industries into NAFTA and WTO has led to trade disputes between Canada and the United States over copyrights, television licensing, violence in media, and discriminatory magazine policy, indicating the need for an agreed-upon process for settling cultural trade disputes.

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Chapter 3  
Supplementary Material on Library  
Collections

## PROFESSIONAL BOOK REVIEWING MEDIA AND INFLUENCE ON UNIVERSITY AND SCHOOL LIBRARY PURCHASING OVERVIEW

Professional book reviewing journals have played a special role, we believe, in identifying appropriate books for teachers and librarians at the K-12 and university and college level, as well as influencing library wholesalers and booksellers. However, there is little to no quantitative data on the influence of these journals in terms of sales of publishers' books. Searches on association sites (ACP, ALA, BCLA, CLA, APMA, CARL, OCUL, CULC, Canadian School Libraries, and others) as well as BookNet Canada, Canadian Children's Book Centre, scr-online, Ontario Council of Libraries, etc. brought up nothing that addresses our question. Further searches on the journal sites themselves did not lead to research data.

### School and public library influencers on purchasing

Thanks to Ontario Media Development Corporation (OMDC) funding and the Organization of Book Publishers of Ontario (OBPO), there is some data, even if it is rather old. In 2006 Pollara Inc. released [\*Canadian books count...: A Study of the Ontario School Library and Public Library Acquisitions Process\*](#), a study that looked at the buying habits of Ontario public libraries – 125 of which responded to the survey – and Ontario school libraries - 309 of which responded. The study found that, "The majority of public library and school library purchases, ... are made through wholesalers (or "jobbers"). Overall, public libraries purchase 81% of the total dollar value of their books from wholesalers, and school libraries purchase 57% through them. ... In some cases, particularly in smaller libraries, wholesalers will select the individual titles for entire categories of a library collection, or even a complete collection for a new library." Clearly, "wholesalers play an important role in title selection and acquisition". (p.7).

This information combined with the following statistic found in the OBPO's [\*Use of Canadian Books in Ontario Public and Catholic Intermediate and Secondary English Departments: Results of a Survey of Teachers of Grades 7 through 12\*](#), June 2017, Figure 6, which demonstrates teachers' methods for discovering new books. Only 10.57% indicated that they purchased books that were reviewed in published lists, the *Globe and Mail*, or bestseller lists, while 11.45% purchased from retailers' lists. While publishers will not want to ignore the value represented by the 10+% of potential purchasers who scrutinize reviews, it may, given the high usage of wholesalers and the lists and catalogues that they produce, indicate this is where publishers' efforts should be directed. Given that, as *Canadian books count....* notes, "wholesalers are the source of 81% of the dollar value of Ontario [public] Libraries' collection purchases and publishers 9%. Bookstores only account for 4% of the dollar value of purchases while Internet sites make up 1%."(p.31) And that, "wholesalers are the source of 57% of the dollar value of School Libraries' collection purchases and publishers 17%. Bookstores also account for 17% of the dollar value of purchases while Internet sites make up 6%."(p.34), the recommendation in *Canadian books count...* is that publishers continue "positive collaboration between wholesalers and publishers." (p.11-12)

Interestingly, the *Canadian books count...* study identified that the perceptions of publishers, wholesalers and "key informants" (public and school librarians) differed considerably on the

question of the importance of book reviews and awards (they are lumped together in the study). School library key informants did not rate book reviews and awards as a factor but listed in order: Price/discounts, availability, relevance to the curriculum, wholesaler suggestions, unbiased/balanced collection, Canadian content and good layout. Public librarians listed in order: patron requests, collection needs, current materials, wholesale recommendations, book reviews, latest Canadian materials and ease of ordering. (p.17) It should be mentioned that the “Tree Awards” are an exception with both public and school librarians indicating that they are an important factor in selection.(p. 19) This is borne out by the BNC Blog, which looked at the impact of the [Forest of Reading Awards](#), October 2017. Here the blog’s graph shows a significant upswing in sales from consumers when the shortlist is announced, but the upswing also represents sales to libraries.

As for review media used to purchase, *Canadian books count...* cites *Quill and Quire* and the *Globe and Mail* as important sources and the following as less important: *The School Library Journal*, *Voice of Youth Advocates*, the *Canadian Children’s Book Centre Book News*, *Publishers’ Weekly*, *Kirkus Reviews*, the *New York Times*, *Macleans*, *Sleuth of Baker Street* (?), web reviews on Amazon, Indigo and Chapters sites, and lists published by the American Library Association. Book awards and reviews are much more important to large public libraries than small. (p.36)

According to *Canadian books count...* school libraries purchase a smaller proportion of their books from wholesalers (53%) than do public libraries (70%). It is interesting to note that larger schools make a greater proportion of their purchases (22%) from bookstores than do smaller schools (14%) while the smaller schools report purchasing a greater proportion directly from the publisher (24% vs. 13%). (p.33)

In summary, looking at *Factors that Influence Title Selection* in *Canadian books count...* “Survey respondents ranked patron requests (public libraries) and curriculum connection (school libraries) as the most important factors driving their book selection decisions. Awards and nominations, as well as book reviews, also play a significant role in influencing title selection. *Quill and Quire* and the *Globe and Mail* are seen as important sources that librarians consult for book reviews. The Silver Birch Awards were frequently mentioned as being an important factor in title selection. Clearly, members of the library community are very positive in their views of Canadian books and their importance. While it is “never the most important factor”, Canadian authorship, content, setting and themes are generally taken into consideration when librarians select books for their collections.”(p.8)

**A case study related to the importance of curriculum for school libraries:** The Association of Book Publishers of BC (ABPBC) has been producing catalogues featuring Canadian-published titles for the K-12 market for over 20 years. Starting with *BC Books for BC Schools*, which was taken over from the BC Ministry of Education, after it cancelled the School Library Book Purchase Plan (SLBPP) in 1992 (?). (The SLBPP provided perhaps one of the only dedicated budgets for the purchase of Canadian books from a Ministry of Education in the country.) When the SLBPP was phased out, its purchase budget was \$250,000, which was entirely dedicated to acquiring BC-published books. Its loss for many members of the ABPBC was significant. In an effort to continue providing teacher-librarians with peer-reviewed annotations of BC books with

curriculum matches and grade levels included, the ABPBC followed Ministry of Education reviewing protocols and kept the catalogue alive. For a while the ABPBC also did all the ordering and distribution under a contract with the Ministry. *BC Books for BC Schools* continues to be circulated to all schools, public and private, in the province as well as to public libraries, who picked up the slack when so many teacher-librarians were taken from their libraries. As well, *BC Books for BC Schools* is circulated to wholesalers across the country and to retailers. The success of this catalogue was followed by *Canadian First Nations Books for Schools* (now called *Canadian Indigenous Books for Schools*) and *Canadian History Books for Schools*, both of which include books by ACP, ACP regional and ACUP members as well as ABPBC members and are circulated to schools and school resource centres as well as public libraries across the country. Because so many teacher-librarians are overburdened, surveys attempted by the ABPBC to determine how many books, dollar value and where ordered were very disappointing. Also, because many orders are placed through wholesalers, it is impossible to know how many were made as a result of the catalogues, although we suspect well over 50+% as is evidenced in the OMDC study. Anecdotally, the ABPBC knows that booksellers fulfill orders from the catalogues. United Library Services has been a long-time advocate for all the catalogues, distributing them in their warehouses and actively promoting the books. Lists of wholesalers appear in all the catalogues.

According to *Canadian books count...*, "Curriculum connection is the most influential factor for School Libraries when they make book selection decisions, with 94% of respondents saying that curriculum connection strongly influences the book selection decision. Teacher requests are a close second with 80% saying that these strongly influence book selection decisions, followed by student requests (64%). Canadian content, setting and themes (60%), as well as Canadian authorship (51%), also strongly influence the book selection decisions in school libraries. Book awards/nominations (53%) and price (53%) are also considered to be strong influences for the majority." (p.60)

### **Academic library influencers on purchasing**

Addressing the question of what influences book purchases by research libraries in the US, [Quora: How do libraries decide which books to purchase...](#), 2014 Quora, a question and answer site organized by a community of users, a professional archivist and academic librarian gave a succinct answer quoted here:

- **Large research university library, \$10 million+ annual acquisitions budget**

A very large chunk of the library's annual budget will go towards e-journal subscriptions, scholarly databases, e-book packages and other electronic resources with annual subscription costs. Of the amount that is left to buy books, the vast majority of the money will be spent through a **book distributor like Baker & Taylor** (commonly called "YBP" for its brand, Yankee Book Peddler: see [YBP.com - Libraries](#)). YBP carries most of the books that are published in the English-speaking world that would normally be needed in an academic library. If the library's budget is large enough, they will likely use an automatic acquisitions program called an "**Approval Plan**" to select and buy books. Approval plans allow libraries to automatically acquire books as soon as they are published, without the library having to explicitly approve the

purchases. Plans are usually written according to very specific criteria which match the library's needs to a set of variables about the books, such as their subject matter, reading level, cost, format, publisher, quality of reviews, and so on.

*For example, a library could ask its distributor to automatically send every book with criteria like this:* published by an American university press; costs less than \$100; not a re-issue of an earlier edition; classed within a particular Library of Congress range. Since the library would always want to buy any book that had these characteristics, the approval plan makes the acquisition of that material more efficient and less likely to miss important books. Anything that falls outside the parameters of the approval plan can either be offered to the library "**on slips**," which just means that the library gets a notification that the book has been published and that they have the option to buy it; or the books can be ignored. Most libraries that use approval plans have a certain amount of funds reserved for "**firm orders**," which means orders for specific books outside the automatic plan. Firm orders are often made based on a combination of requests from faculty and the librarians' knowledge of their subject areas, and of which books are likely to circulate.

- **Small academic library, \$1m acquisitions budget**

For small academic libraries, the book budget is often very tightly squeezed. 90% of the acquisitions budget may go towards electronic journals, databases and e-book packages. The remaining 10% has to cover all of the majors in the school. In other words, the library may only buy 30-50 books per major, per year (counting only the books outside of e-book package deals, where you don't necessarily get to pick which specific books you get). **In this scenario, libraries rarely use automatic approval plans**, except to get notifications of books that have just been published "on slips." Virtually every book is selected one at a time. Librarians can use their distributor's database, however, to narrow down the book selections for that year to the most essential publications. When I am selecting books, for example, I often look for a set of criteria like: published in the last two years; under \$60; preferably in paperback; classed as "basic-essential" or "research-essential" in the distributor's system; currently in stock; and (of course) falls within a relevant topical area. I can see how many other libraries in the United States have purchased a book, as well as how many other libraries in my consortia have purchased it, which sometimes influences my decision to buy. We often also cross-check potential acquisitions with book review and book award sites, as well as looking at non-professional reader reviews on Amazon. I personally also check my library's circulation statistics within call number ranges for the past year, to see what types of things have been checked out and what is likely to circulate again. We also communicate with faculty liaisons in our departments to ask for their requests, and we look at lists of upcoming classes so that we can match book selections to students' coursework.

**Readership and where indicated reviews published of cited publications as indicated on the publication's or organization's website:**

Canadian Children's Book Centre: CCBC reaches half a million people each year.

*Kirkus Reviews*: Targeted industry readership of librarians, booksellers and publishing professionals. It reviews 8,000 titles a year. No circulation numbers available. Their “website is dominated by consumers”.

*Library Journal, School Library Journal, Horn Books*: “*Library Journal*, LLC is the most trusted and respected publication for the library community. Built on more than a century of quality journalism and reviews, *LJ* provides groundbreaking features and analytical news reports covering technology, management, policy and other professional concerns to public, academic and institutional libraries. Our hefty reviews sections evaluate 8000+ reviews annually of books, ebooks, audiobooks, videos/DVDs, databases, systems and websites. Our team of library and literary experts communicate with our audience through print, digital and live content and continuously strive to stay on the cutting edge of the ever-evolving world of libraries.” Their print product circulation is 43,000 and their online version has 919,000 average monthly pageviews.

*Literary Review*: 44,750. Notes their readership includes highly educated, wealthy, prominent and book buyers. Their site says their “targeted circulation sells more books per capita than most journals.” (For some reason, late in the day, I find this hilarious not to mention unsubstantiated.)

*Publishers Weekly*: 68,000 readers, 10M unique visitors online in 2017, reviews 9,000 books annually, 972,000 combined social media reach.

*Quill and Quire*: 12,5000. An ACP survey that I cannot find was cited by Q&Q as placing them #1 of 60 information sources for libraries.

Quora:

How do libraries decide which books to purchase?

March 2014

## How do libraries decide which books to purchase, and which books to remove from circulation?

Eva Guggemos, Professional archivist and academic librarian

**Librarians use a combination of online tools, expertise in their subject areas and knowledge of their patrons to select books.** The precise process they use depends on many factors, including whether they work in a public, academic or special library, the scope of their collection and the size of its acquisition budget. I have bought books for a large research university and a smaller liberal arts college in the U.S., and the strategies we used to buy books and meet users' needs were very different. I'll give three use cases to illustrate some of the differences. (Source of graph above: [Print vs E-books Here's a comparison of print...](#))

- **Large research university library, \$10 million+ annual acquisitions budget**

A very large chunk of the library's annual budget will go towards e-journal subscriptions, scholarly databases, e-book packages and other electronic resources with annual subscription costs. Of the amount that is left to buy books, the vast majority of the money will be spent through a **book distributor like Baker & Taylor** (commonly called "YBP" for its brand, Yankee Book Peddler: see [YBP.com - Libraries](#)). YBP carries most of the books that are published in the English-speaking world that would normally be needed in an academic library. If the library's budget is large enough, they will likely use an automatic acquisitions program called an "**Approval Plan**" to select and buy books. Approval plans allow libraries to automatically acquire books as soon as they are published, without the library having to explicitly approve the purchases. Plans are usually written according to very specific criteria which match the library's needs to a set of variables about the books, such as their subject matter, reading level, cost, format, publisher, quality of reviews, and so on.

*For example, a library could ask its distributor to automatically send every book with criteria like this:* published by an American university press; costs less than \$100; not a re-issue of an earlier edition; classed within a particular Library of Congress range. Since the library would always want to buy any book that had these characteristics, the approval plan makes the acquisition of that material more efficient and less likely to miss important books. Anything that falls outside the parameters of the approval plan can either be offered to the library "**on slips**," which just means that the library gets a notification that the book has been published and that they have the option to buy it; or the books can be ignored. Most libraries that use approval plans have a certain amount of funds reserved for "**firm orders**," which means orders for specific books outside the automatic plan. Firm orders are often made based on a combination of requests from faculty and the librarians' knowledge of their subject areas, and of which books are likely to circulate.

- **Small academic library, \$1m acquisitions budget**

For small academic libraries, the book budget is often very tightly squeezed. 90% of the acquisitions budget may go towards electronic journals, databases and e-book packages. The remaining 10% has to cover all of the majors in the school. In other words, the library may only buy 30-50 books per major, per year (counting only the books outside of e-book package deals, where you don't necessarily get to pick which specific books you get). **In this scenario, libraries rarely use automatic approval plans**, except to get notifications of books that have just been published "on slips." Virtually every book is selected one at a time.

Librarians can use their distributor's database, however, to narrow down the book selections for that year to the most essential publications. When I am selecting books, for example, I often look for a set of criteria like: published in the last two years; under \$60; preferably in paperback; classed as "basic-essential" or "research-essential" in the distributor's system; currently in stock; and (of course) falls within a relevant topical area. I can see how many other libraries in the United States have purchased a book, as well as how many other libraries in my consortia have purchased it, which sometimes influences my decision to buy. We often also cross-check potential acquisitions with book review and book award sites, as well as looking at non-professional reader reviews on Amazon. I personally also check my library's circulation statistics within call number ranges for the past year, to see what types of things have been checked out and what is likely to circulate again. We also communicate with faculty liaisons in our departments to ask for their requests, and we look at lists of upcoming classes so that we can match book selections to students' coursework.

- **Medium-sized public library**

I am least familiar with this case scenario, since I have never worked in a public library. My impression from talking with friends who are public librarians is that a much smaller portion of their acquisitions budgets go towards databases, e-journals, etc. Public libraries have a different philosophy of buying than academic libraries: academic libraries have to buy in order to support research and coursework, while public libraries buy in order to support readers' recreational reading, personal growth and general informational needs. Public libraries will often buy multiple copies of the same book and/or multi-user licensed e-books to enable many readers to check out the same popular book at the same time. They will buy from lists of best-sellers and books that have recently been reviewed in the media, since they know that many readers will ask for them. I don't know whether public libraries use the same distributor as most academic libraries (YBP), but they likely have a similar way of selecting books as the small academic library: that is, through a **combination of database searches and choices based on knowledge of their patrons' preferences and needs**. Perhaps a public librarian could chime in here with some better detail about the process.

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## About Discards

Discards are relatively rare in a large academic research library. Rather than discard books, they will often warehouse them in huge, **off-site storage** spaces, to be retrieved on demand. The only books that are very likely to be discarded are ones that have been heavily damaged. This is because of the potential long-term research value of books even after they are no longer popular or up-to-date in their content.

Smaller academic libraries sometimes have off-site storage for books, but not always. "**Weeding**" of the book collections has to be done periodically in order to make space on the shelves. Selections for this are often based on criteria such as "has not circulated in 5 years" or "over 50 years old." These books are usually checked against the library's consortial database to see whether any of them are **scarce -- often, if a book exists in 3 or fewer copies** across the consortium, it will not be discarded. Books flagged for discarding are first looked at by a professional librarian, who exempts the important books from discarding, and may re-class the most significant ones as "**rare**", **which means that they will permanently stay in the library's non-circulating collections.** Books that are discarded are usually either sold to a bulk reseller or pulped, if no one wants them. (Who wants a water-stained 5th edition of a history book from 1972? Pretty much no one.)

Most public libraries do have to discard books fairly often, for the same reasons as small academic libraries. They can discard extra copies of the best sellers that were popular five years ago, but are no longer so popular; and they can discard anything that hasn't circulated in a while. As most people know, a lot of these books end up being sold to benefit the library in annual book sales.