



CANADIAN CONTENT IN A DIGITAL WORLD
SUBMISSION TO CANADIAN HERITAGE
PREPARED BY THE ASSOCIATION OF CANADIAN PUBLISHERS
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A. INTRODUCTION

Around the world, books are central to culture. Cultural goods in their own right, books also inspire a range of other media and art forms—film, television, music, dance, and stage plays to name only a few. With the advent of digital technology that supports the discovery and distribution of books in a variety of formats, opportunities to reach readers at home and abroad are greater than ever before. Canadian book publishers have seized the opportunity digital technology presents, building on a strong tradition of independent book publishing that has developed over the past fifty years. As we look to the next fifty, independent publishers remain committed to fostering Canadian talent, serving Canadian readers, and bringing our written culture, heritage, and perspectives to an international audience.

The Association of Canadian Publishers (ACP) represents 115 English-language book publishers from all ten provinces and Nunavut. Our members are independent businesses, owned and operated by Canadians. Along with our francophone counterparts, we publish 80% of the new books written by Canadian authors each year, contribute to local economies, and are a vital part of Canada’s cultural industries. We are known internationally for our creativity, entrepreneurship, and innovative approach to business, and for the high quality books we publish. We are fully engaged in the digital marketplace, and through our sister organization, eBOUND Canada, ACP members’ ebooks generate sales in 112 territories around the world.

All cultural industries have experienced transformative change over the past decade, and we applaud Minister Mélanie Joly for her leadership in reviewing Canadian Heritage’s cultural policy toolkit to ensure it is equipped to meet the challenges and opportunities the digital world presents. We note that Heritage programs and policies have been instrumental to the development of a vibrant domestic publishing industry, owned and controlled by Canadians who are committed to serving Canadian readers and to bringing Canadian content to as wide an audience as possible. The programs and policies that support our sector are a vital component of the Canadian publishing ecosystem, and we value the opportunity to explore their relevance in today’s digital environment as part of this review.

B. CANADIAN READERS AND BOOK PUBLISHING IN CONTEXT

Canada is a nation of readers. Canadians turn to books for information, education, and entertainment, and despite the emergence of a wide range of new media that compete for consumers’ leisure time, readership levels in Canada have risen over the past 35 years. Reading remains an important pastime



that Canadians from all demographic groups and in all regions of the country participate in regularly.¹ Reading's future is bright in Canada, and millennials are among the nation's most avid readers. 86% of Canadians aged 18-34 report having read a book in the past year, compared with 81% of other demographic groups. Millennials read books in all formats: 89% report reading print books, 54% ebooks, and 11% report using their mobile phone as their primary reading device, a number that is growing.²

Over the past ten years, the global publishing industry has experienced a digital transformation. Not since the introduction of the mass market paperback in the 1930s has a new format so rapidly changed the way readers consume books and, by extension, the business models of book publishers. It is not only books that have become digital, but also the systems and strategies that support content delivery to audiences around the world. Canadian firms have adopted digital workflows, invested in training and professional development, and now employ a full range of digital marketing tools to bring books to readers. In response to consumer adoption of smartphones, tablets, and e-readers, today you will find Canadian ebooks available for sale through major ebook vendors including Kindle, Kobo, and the Apple iBookstore, and through a variety of digital platforms that serve public libraries and their patrons.

The Canadian book market is among the most competitive in the world, and the production, marketing, and discovery of Canadian books is a persistent challenge given our relatively small population and proximity to the United States. Multinational publishing firms are well-established in the Canadian marketplace, and compete with Canadian firms for shelf space in bookstores, for publicity opportunities with media, and for manuscripts from Canadian authors. They do so with their parent companies' infrastructure and resources behind them, and with the benefit of revenue earned from the sale of the high profile, foreign-authored books that dominate Canadian bestseller lists. In part, those sales are made possible by Canada's *Copyright Act*, which protects the exclusive distribution rights of book importers through the Book Importation Regulations.³ To succeed in this highly competitive marketplace, independent firms employ creative strategies to encourage innovation, maximize scarce resources, and build audiences for Canadian content.

¹ EKOS Research Associates, *Public Opinion on the Value of Books in the English Language Book Sector: Summary Report*, 2015, p. 3.

² BookNet Canada, "BNC Research: Millennial Book Consumers Now – Tech Forum 2016," presented by Noah Genner, <http://www.slideshare.net/booknetcanada/bnc-research-millennial-book-consumers-now-tech-forum-2016-noah-genner>.

³ The Book Importation Regulations (BIRs) support exclusive distribution agreements in Canada and ensure that books are sourced in Canada, while making provisions for imports when certain conditions are met. The BIRs recognize that Canada is a market distinct from the United States and other territories, and ensures that Canadian rightsholders are compensated for book sales in this country.



Despite the widespread availability of ebooks across a range of channels, print book sales remain central to Canadian publishers' business model. Independent publishers have invested heavily over the last ten years to ensure full engagement with the digital marketplace, while at the same time maintaining the infrastructure required to support the sales and distribution of physical books. The costs of print production and distribution remain a significant expense for publishers, and digital books, too, have their own distinct production and distribution costs. Print or digital, Canadian books are written, edited, designed, and produced using digital tools, and most publishers now release digital editions simultaneously with print. Many firms have invested in developing innovative e-commerce solutions for their own websites, and virtually all are engaged in a full range of digital marketing activities. Whether readers choose print or ebooks, digital technology is essential to the creation, discovery, and delivery of Canadian books today.

C. A SOCIAL CONTRACT FOR THE DIGITAL WORLD

The policy review launched in spring 2016 presents an opportunity for Canadian Heritage and stakeholders to reflect on the current state of our cultural ecosystem. With respect to the book sector, ACP believes that a healthy ecosystem is one which encourages the writing, publication, and reading of a diversity of written works, in a variety of formats. A copyright regime that allows rightsholders to be fairly remunerated for their work is one component of this ecosystem, as is a robust network of retail outlets (independent, chain, online) and public and school libraries, to ensure access to and enjoyment of books of all kinds, by Canadians of all ages and socioeconomic backgrounds. Both the public and private sectors have roles to play in encouraging the health of this ecosystem. With this in mind, we offer our reflections on the three principles that serve as the foundation for Heritage's new model.

Principle #1: Focusing on citizens and creators

"A new model must both respect citizen choice and support content creation."

Pillar 1.1: Enabling choice and access to content

Canadians have access to more books than ever before. Online retail provides an extremely convenient experience for readers interested in purchasing a specific title they have previously identified, or a work by an author familiar to them. For those seeking to discover books of which they are unaware, the experience is very different. In both physical and online stores, discoverability results directly from the curation of the inventory on offer. In online environments, curation is largely a function of system algorithms, and these, while increasingly sophisticated, still fall far short of human curation in matching specific books with individual reader interest. These algorithms often suggest a narrow selection of titles, frequently reinforcing works by high profile authors or blockbuster titles, of which book buyers are more likely to already be aware.



To truly respect citizen choice in book selection, readers must be presented with books that reflect their tastes, interests, and own realities. Independent Canadian publishers have addressed this challenge using a variety of tools, and have made great strides in improving discoverability over the past several years, investing time and resources into metadata management and collective initiatives to raise the profile of Canadian books online. This work is ongoing, and sustained investment in the marketing and promotion of Canadian books is essential to ensuring readers have access to the rich diversity of content we want to present to the world.

In addition to ensuring Canadian readers have access to a broad range of content, access to different formats is an important component of our book ecosystem. This extends beyond print, digital, and audiobooks, and also includes the full range of digital formats used by persons with print disabilities who wish to read Canadian books, whether they are frontlist or backlist titles. Canadian publishers are leaders in deploying new digital technologies in order to make our books accessible to persons with print disabilities, and this is an area that will require increased investment in publishers' digital production workflows given the variety of formats now used, from DAISY 202 files to specialized epub files with features such as text-to-speech functionality and semantic mark-up.

[Pillar 1.2: Supporting our creators](#)

Digital technology now offers writers a variety of ways to bring their books to readers, including self-publishing, but many continue to prefer to work with a traditional publisher with the expertise to edit, market, sell, and distribute their books in both print and digital formats. Canadian-owned publishers are an essential part of the Canadian publishing ecosystem, and together English- and French-language firms publish 80% of the new books by Canadian writers each year. These include books by emerging and established writers of all genres, those publishing their first book, and those who have become household names.

Regardless of size, no publishing firm operating in Canada today publishes books that represent the full spectrum of contemporary Canadian writing. While the handful of multinational publishing conglomerates operating out of Toronto publish a narrow selection of high profile Canadian writers, they comprise only one branch of our writing and publishing ecosystem. Together the firms that make up the independent Canadian-owned publishing sector serve as an essential network that supports Canadian creators in building sustainable careers. Without a strong independent publishing sector, Canadian writers seeking a publisher would do what they did in the years prior to the establishment of our domestic industry. They would be limited to seeking publishing contracts with foreign firms operating out of New York or London, which neither understand the Canadian market and readers, nor demonstrate interest in Canadian subjects. Fewer Canadian books would be published, and the rich literary culture that has developed in this country over the past fifty years would erode.



Like publishers, Canadian writers rely on sound public policy and a strong market framework to garner the return on investment required to support viable businesses and careers. Copyright is the foundation of our business, and provides a mechanism for rightsholders to be compensated for their investment in new works. This foundation has been severely disrupted over the past four years, since the introduction of the *Copyright Modernization Act* and its expansion of fair dealing to include education. The education sector, acting unilaterally, soon issued “Fair Dealing Guidelines” that permit educators to copy and distribute a broad range of copyright-protected material. Since then, rightsholders have experienced an abrupt and dramatic reduction in licensing revenues. Publishers and creators are not being paid for use of their work in digital or printed form by a large part of the educational market. This reduction in income will have an effect on our ability to continue to invest in new Canadian-specific works, and will have an effect on how successful, or indeed viable, a creative career in this area can be in the future. We believe that a social contract for the digital world is one that ensures fair and sustained payment for use of work in all forms.

Principle #2: Reflecting Canadian identities and promoting sound democracy

“Canada’s diversity is a strength and Canadian content that reflects our diversity strengthens our democracy. A new cultural model must leverage this diversity, recognizing it as a competitive advantage, a source of innovation and a contributor to the cohesion of society.”

Pillar 2.1: Redefine Canadian content for contemporary Canada

Books remain central to our democracy. They spark debate and national dialogue around the ideas and questions that drive 21st century life, and it is essential that Canadian books reflect the diversity of the Canadian experience in all regions. Fifty years ago, 98% of book publishers operating in Canada were located in Montreal and Toronto. Thanks to sound public policy and strategic investment on the part of Canadian Heritage, today independent publishers operate in dozens of cities from coast to coast to coast, and publish works by writers in communities across the country.⁴ The result is a rich body of contemporary Canadian works that reflect the diverse experiences and perspectives of our population. From Victoria to St. John’s to Iqaluit and everywhere in between, independent publishers continue to introduce Canadians to each other and Canada to the world.

A vibrant independent publishing sector is essential to fostering a book and reading culture that reflects the lives of Canadians today. The business models of large multinational firms are not well-suited to publishing works that go beyond the mainstream. Instead they publish only the most likely bestsellers, which will appeal to the broadest possible audience. These books do not include in large numbers those

⁴ “Investing in the Future of Canadian Books: Review of the *Revised Foreign Investment Policy in Book Publishing and Distribution*,” Canadian Heritage, July 2010, p. 6.



that reflect the diversity of Canada’s population in terms of race, religion, ethnicity, sexuality, gender, and ability, nor the geographic and regional diversity that is a hallmark of Canadian identity and democracy. The risk associated with publishing these titles is higher, and the support systems in place for Canadian-owned firms, which encourage investment in Canadian-authored works across a broad range of genres and by a diversity of authors, help level the playing field and increase the competitiveness of Canadian publishers in our home market and around the world.

National cultural institutions play an important role in supporting the creation and dissemination of Canadian culture. For example, the Canada Council for the Arts continues to offer essential support for the creation and publication of new books, and has been instrumental to the development of Canadian literature, which is recognized around the world. CBC plays an important role in promoting Canadian writing through its programming, with programs like Canada Reads and the Next Chapter bringing Canadian writing to the forefront. As the future of the CBC is reimagined, space for books—on television, radio, and online—will be an important way to encourage the consumption of Canadian content and democratic engagement.

Pillar 2.2: Strengthen the availability of quality information and news in local markets.

A diverse ecosystem of news outlets (print, radio, television, online) is critical to the strength and vitality of Canadian democracy in a digital world. Concentration in these sectors over the past twenty years has narrowed the variety of perspectives available to Canadians, and options for local news have diminished significantly. The importance of access to local programming and media extends beyond news and information and is vital for all cultural industries. For books, these local news programs provide important vehicles for promotion and discovery, especially for books by Canadian authors on subjects of local or regional interest. In addition to providing Canadians with the information they need about the issues of importance in their communities, they also help shape culture and encourage Canadians to consume local content.

Principle #3 Catalyzing economic and social innovation

“The social benefits of culture are well understood. A strong cultural sector contributes to the vitality of our communities...Culture not only strengthens our social fabric, but is at the heart of the creative economy.”

Pillar 3.1: Positioning Canada as a culture and digital content leader

The development over the past fifty years of a Canadian-owned and -controlled publishing sector is something that all Canadians can be proud of. Through strategic investment on the part of government and the application of sound public policy, our domestic publishing industry continues to thrive. As small- and medium-sized businesses operating in an exceptionally competitive landscape, constant



innovation and creative entrepreneurship are essential to success in today's marketplace. These traits are at the core of Canadian publishing today, and have allowed publishers to develop the technical capacity required to participate in the digital marketplace.

This capacity is in part the result of stable investment in the Canada Book Fund (CBF), which has been instrumental to the development of a strong Canadian industry. The fund has been rigorously developed and administered to support Canadian-owned publishers who employ best business practices, commit to innovation, and aggressively promote Canadian authors at home and internationally. The standards for success within the program are high; for those publishers who meet them, the CBF is an essential support that ensures their businesses remain competitive, and that a diverse, Canadian-owned publishing sector thrives in all regions of the country.

Through its support of collective initiatives, CBF has also fostered collaboration and partnership across our industry, which has positioned independent publishers as global leaders in the digital space. Organizations like BookNet Canada and eBOUND Canada are continually developing made-in-Canada solutions to the challenges the digital market presents, and contribute to a culture of innovation. As a result, Canadian publishers are ahead of the curve internationally when compared to firms of similar size. Our digital capacity has grown to the point that we now export our professional expertise. For example, some members of the ACP sell ebook design and production services to smaller US publishers, earning revenue that can be reinvested in their own businesses.

Pillar 3.2: Leveraging Canada's national cultural institutions

The federal government has made a landmark commitment to double the Canada Council for the Arts' budget by 2020-21. ACP thanks and congratulates the government for this investment, noting that CCA's support of Canadian-owned publishers and the writers we publish has contributed to the development of a vibrant literary culture in this country, with books being a vital part of the everyday lives of Canadians. CCA is an essential partner in building audiences for Canadian-authored books, with the existing Block Grant program for book publishing supporting the publication of approximately 3,500 books in English and French each year. New publishing houses are flourishing, and since 2002, 70 new publishers (40 Anglophone, 30 francophone) have entered the program. CCA's book publishing programs serve to complement the industrial programs of Canadian Heritage, providing support to literary and artistic works.

Among the Canada Council's current strategic priorities is the goal of "amplify[ing] the quality, scale and sharing of Canadian art through digital technology." Book publishers look forward to working with the Council to leverage this investment, especially with respect to building new audiences for Canadian books, and improving discoverability of those books in the online environment.



In section 2.1 above, we note the importance of the CBC in promoting Canadian writing, both locally and nationally, through its programming over the airwaves and online. We reiterate here how vital the CBC is to Canadian publishers in their pursuit of new audiences, and in the continued development of a Canadian reading culture.

Pillar 3.3: Promoting Canadian content globally

International markets are an integral part of many Canadian firms' business models. For some, sales of finished books and territorial rights account for more than 50% of their annual revenue, which is in turn reinvested in the Canadian economy, Canadian employment, and new Canadian writing. Canadian publishers' success is rooted in the appeal our stories have around the world, but also in the dedication of Canadian publishers to building relationships with international partners, investing human and financial resources into building export sales programs, and gathering the market intelligence required to match books to particular markets. For more than forty years, the programs of Livres Canada Books (LCB) have supported Canadian publishers in pursuit of these goals, and they remain essential to increasing the competitiveness of Canadian firms on the international stage.

The digital marketplace presents great opportunity for Canadian publishers to reach new audiences in territories around the world, including in those that have not traditionally been explored as markets for Canadian books. Through eBOUND Canada, which provides digital asset management and distribution services to 70 independent Canadian publishers, books are sold through a variety of retail and wholesale channels. Thanks to these channels, digital Canadian content is now being purchased not only in Canada, but in more than 100 territories around the world. Print-on-demand (POD) technology also makes it possible to sell print books abroad, without incurring the costs required to ship and warehouse books internationally.

Canadian publishers have only begun to explore the possibilities the digital export market presents. While the technical capacity exists to produce and deliver ebooks abroad, discoverability and promotion remain challenging. Support for further engagement with international markets and exploration of new partnerships with international wholesalers and distributors is essential to the growth of digital sales globally.

D. RECOMMENDATIONS

Government programs and policies have contributed to the development of a vibrant Canadian-owned publishing sector that supports the publication of a rich diversity of Canadian books. Our publishing ecosystem provides a strong foundation on which to explore the opportunities and realities of the digital marketplace, while continuing to serve readers who prefer reading books in print. Canadian publishers have a high capacity to compete in this marketplace, though the right balance of policy and



programming supports are essential to our continued success. In that vein, ACP makes the following recommendations:

1. **Enhance government investment in Canadian book publishing, to maintain competitive capacity of Canadian publishers, expand export activity, and support continued digital innovation in the sector.**

The Canada Book Fund (CBF) has been a stable and predictable source of funding for Canadian publishers, and has been vital to the development of a strong Canadian industry. Among the most effective tools Canadian Heritage offers book publishers, CBF is a well-managed program, which rewards economic success while encouraging innovation and risk taking, and demonstrates positive results year-over-year. The program has evolved to address the challenges and opportunities digital publishing presents, and is at the core of why book publishers have adapted so successfully to the digital marketplace.

As the digital landscape continues to evolve, and publishers seek to further expand their businesses internationally, the need for public investment in our sector remains. Though the dollar value of the CBF has remained consistent for 15 years, inflation, rapidly changing market conditions, and government policy decisions have combined to limit Canadian publishers' competitiveness, while high demand has led the Support for Organizations component of the fund, which encourages collaboration and collective innovation across the sector, to be heavily oversubscribed. **We recommend increasing CBF's annual budget from \$39.1 million to \$54 million.**

2. **Keep our book industry Canadian and support Canadian-owned publishers first.**

Publishing is a global industry and ACP members recognize that our ecosystem includes both Canadian-owned firms and international players. From the multinational publishers that operate in Canada to the global online retailers and content aggregators that consumers increasingly turn to for the discovery and purchase of books in all formats, the book business transcends borders. To be successful in this global ecosystem, Canadian firms must be strategic in their acquisitions, marketing, and promotion, in order to maximize the presence of the Canadian-authored books they publish, in both print and digital formats. It has been demonstrated that Canadian-owned firms are more likely to publish books by Canadian writers, and we reiterate that Canadian-owned firms are responsible for 80% of the books published by Canadian authors each year.

Independent publishing is a national and international success story, the result of more than fifty years of Canadian investment in Canadian publishing. Canadian ownership and control in the book business is crucial to this success, both today and in the future. The *Revised Foreign Investment Policy in Book Publishing and Distribution* is the bedrock of our domestic industry and has guaranteed Canadians a



steady supply of diverse books in all genres from authors across the country. The numerous exceptions made to the policy in recent years have provided very little benefit to Canadians, and in the case of the 2012 acquisition of McClelland & Stewart by Random House, an exception has taken enormous long-term investment by Canadian taxpayers and transferred author contracts and ongoing profits to foreign owners. Considerations of cultural sovereignty must play an important role in determining “net benefit to Canada” when questions of foreign investment are considered. Independence and diversity are hard-won strengths of the Canadian-owned industry, and the result of sound public policy. Further erosion of Canadian ownership in the book business would be to the detriment of Canadian creators, publishers, and consumers. **We recommend that the ownership policy be enforced, with more meaningful assessments of “net benefit to Canada.”**

3. Review the *Copyright Modernization Act* and clarify fair dealing provisions.

Copyright is the foundation on which the book business is built. It provides access to consumers, while ensuring creators and publishers are compensated for their investment in the books Canadians rely on for education, entertainment, and information. Since the adoption of the *Copyright Modernization Act* in 2012, educators at both the K-12 and post-secondary level have interpreted new fair dealing provisions very broadly, and ceased making payment for the copyright protected materials they rely on to deliver curriculum and courses to Canadian students. Revenues have dropped dramatically, limiting the industry’s capacity to reinvest in Canadian work. The education sector’s interpretation of fair dealing has led to costly and disruptive litigation that, at best, will take several years to resolve. Though a review of the *Copyright Modernization Act* is forthcoming in 2017, we anticipate that the recommendations that result could take significant time to implement—time educational publishing firms do not have. **We urge the government to clarify fair dealing provisions immediately, to ensure fair compensation for the use of copyright-protected work, and the continued production of Canadian learning resources for our students.**

E. CONCLUSION

The consultation paper identifies an evolution in thinking at Canadian Heritage from “**protecting** Canadian culture to **promoting and supporting** Canadian culture.” We suggest that both are required to ensure the continued vitality of the Canadian cultural sector. We have an abundance of Canadian content that appeals to audiences around the world, but without measures in place to ensure Canadian creators and producers have the capacity and skills to thrive in a digital world, the independent Canadian publishing industry that has developed over decades will erode. A level playing field in our home market is the first step towards global success, so that Canadian writing continues to flourish.

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APPENDIX: CASE STUDIES

The following examples highlight Canadian publishers' engagement in the digital world—both at the firm level and through collective initiatives. This is only a small sampling of the digital activity that is now routine in our sector.

A. Publishing Firms

Portage & Main Press, Winnipeg, MB

With the goal of expanding its existing client base and reaching teachers seeking digital resources, in 2015 Portage & Main Press launched a fully responsive website that includes e-content for teachers and students through its eClassroom portal. The portal provides access to e-chapters from approved textbooks, free interactive science and technology activities, and audio books. With support from the Government of Manitoba, Portage & Main staff worked with a third-party web and software design firm to create this powerful and integrated content management system. The website's responsive capabilities have substantially increased efficiencies for Portage & Main's marketing and customer service staff, and the collection of digital resources on offer continues to grow.

Brush Education, Edmonton, AB

With strength in creating specialized resources for those working in the field, Brush Education now builds enhanced digital editions of their medical and health resources. For example, the firm has embedded short videos into the ebook version of *Cultural Competency Skills for Psychologists, Psychotherapists, and Counselling Professionals*, which can be played directly from a tablet or hand-held device. Those same videos are also available on a DVD, which accompanies the print version of the book. Other titles are published in print, ebook, and as iOS and Android apps. In all cases, Brush aims to create resources that combine authority, high-value features and convenience, and to offer resources in each customer's preferred format. Given the complexity of these resources, which serve specialized audiences, finding a price point that makes it possible for the firm to achieve a return on investment while providing value to the customer is essential to success. As a result, Brush is experimenting with innovative publishing, and is establishing itself as an essential service provider in specialized fields.

UBC Press, Vancouver, BC

With the support of a grant from the Andrew W. Mellon Foundation, UBC Press has partnered with the University of Washington Press to develop an online platform for media-rich books in Indigenous studies, which will facilitate knowledge sharing between Indigenous communities and scholars in a collaborative digital environment. The platform will offer a suite of tools that will enable scholars and their partners to co-create and collaboratively author and publish their work in innovative ways that go beyond the traditional printed book. Two digital multi-path book prototypes will be developed by 2018, which will provide a foundation for the publication of a collection of interactive books.



University of Toronto Press, Toronto, ON

Starting as an XML-first workflow development to enhance the digital-readiness of the press' content, P-Shift now operates as a small division of University of Toronto Press (UTP), the largest university press in the country. Serving publishers in Canada, the UK, and US, P-Shift offers publishers a range of digital services including XML file preparation, EPUB creation, file storage, file output, and e-distribution. This new division has ensured that UTP content is "future proofed" for the next shift in digital requirements, and has helped grow the firm's client-base, for both XML and traditional distribution. This new revenue stream is a natural offshoot of UTP's early adoption of digital publishing and ebook conversion, which has made its rich catalogue available for purchase by individuals and institutions around the world.

House of Anansi Press, Toronto, ON

In March 2014 Anansi released its Massey Lectures app with support from production partner, Critical Mass (a Canadian digital design agency), and content partner, the CBC. The app itself is a free download with lots of "freemium" content, and within the app readers can purchase individual titles or themed sets of titles to read using an in-app e-reader that, for the first time ever, combines the text and audio of each lecture. Shortly after launch, in June 2014, the app won a Silver Lion in the Design category at the Cannes Lions media awards. Cannes Lions is the world's largest celebration of creativity in communications, and this award carries significant international prestige.

Kids Can Press, Toronto, ON

With the goal of re-introducing e-commerce to the company's website, and with the support of a grant from the OMDC, Kids Can Press worked with Vertical Wave Solutions (an Ontario-based company) to integrate the Shopify platform into its recently redesigned website. Shopify allows Kids Can to have a direct relationship with its customers and become their own distributor of ebooks in the marketplace. The platform allows Kids Can to be nimble with its marketing decisions—discounts can be offered at a moment's notice for recent award winners or well-reviewed titles—and offer ongoing promotional sales to customers.

B. Collective Initiatives

Read Local: Atlantic Publishers Marketing Association (APMA)

Thanks to the investment Atlantic publishers have made in digital production, the APMA, in partnership with the Nova Scotia Provincial Library, Nova Scotia Department of Communities, Culture & Heritage, and Halifax Public Libraries, developed a collection of more than 400 locally published ebooks for public libraries, which launched in 2015. An additional 100 books were purchased in 2016 based on the success of the first phase of the project. Atlantic Canadian content is now easily identified by library patrons through public libraries' online catalogues, and has demonstrated that demand for books by local



authors is high. As of March 2016, books in the original collection had circulated more than 8,000 times, with an average circulation rate of 20 check-outs per title.

eBOUND Canada (www.eboundcanada.org)

Originally a project of the ACP, and now a separately incorporated non-profit service organization, eBOUND Canada helps Canadian-owned publishers engage with the digital marketplace. With a combined catalogue of more than 8,000 ebooks available for sale in more than 100 territories around the world, eBOUND generates annual sales of more than \$1.3 million. Working with 70 publisher clients, eBOUND conducts research on the ebook market, secures group buys of ebook production and distribution services, provides professional development and training in digital production, and manages distribution agreements with a wide range of ebook retailers on behalf of small- and medium-sized Canadian publishers. The organization is recognized internationally for its innovative approach to supporting the digital publishing activities of its clients.

BookNet Canada (www.booknetcanada.ca)

BookNet Canada is a non-profit organization that develops technology, standards, and education to serve the Canadian book industry. Founded in 2002 to address systemic challenges in the industry, BookNet supports publishing companies, booksellers, wholesalers, distributors, sales agents, and libraries across the country. Industry-led and funded in part by the Department of Canadian Heritage, the organization creates and manages supply chain technology, oversees standards and certification for the Canadian industry, and provides research and education. The products and services BookNet offers have made Canadian publishers international leaders in supply chain management.

49th Shelf (www.49thShelf.com)

A project of ACP intended to increase the discoverability of Canadian books online, 49th Shelf represents the largest collection of Canadian books ever assembled. With more than 90,000 titles listed on the site – all of them Canadian authored – 49th Shelf makes it easier for readers to discover Canadian books in all genres, from bestselling authors to new talent, from all regions of the country. Special services for librarians and educators are available, including a weekly “Read Canadian” e-newsletter featuring the latest Canadian selections.

Livres Canada Books (www.livrescanadabooks.com)

Founded in 1972, Livres Canada Books supports Canadian-owned and -controlled publishers’ export activities. The only national industry association serving both English and French-language publishers, Livres Canada Books connects firms across the country and provides a range of services including research, market intelligence, marketing support, and the collective Canada Stand at international book fairs. Livres Canada Books also administers the Foreign Rights Marketing Assistance program, on behalf of the Department of Canadian Heritage.