

INDUSTRY PROFILE - BOOK

FEBRUARY 2023 PROFILE

INTRODUCTION

Book publishing in Canada is a \$1.4 billion industry, with Ontario contributing almost two-thirds of total national operating revenue at \$980 million. The Ontario publishing ecosystem includes large, foreign-owned publishing firms as well as smaller, Canadian-owned publishers.

INDUSTRY SIZE AND ECONOMIC IMPACT

Note: The following information on employment, revenue and the consumer market should be considered a snapshot of activity in the industry based on the best available information. Many of the figures for Canadian-owned publishers contained in this profile include a very small number of large corporations whose characteristics differ significantly from those of small- and medium-sized book publishers. All dollar figures are in CAD unless otherwise noted.

EMPLOYMENT AND WAGES

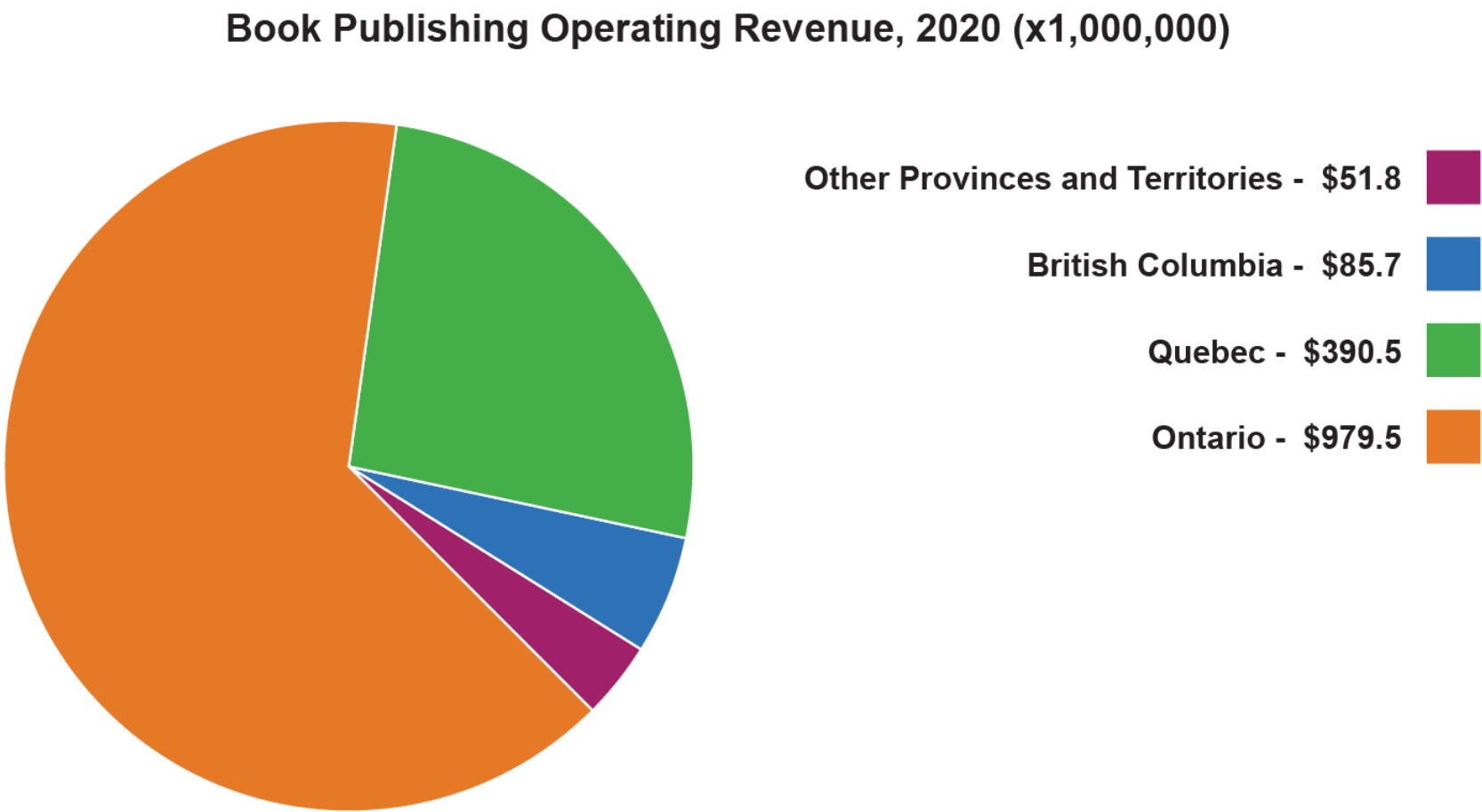
- In 2020, the Canadian book publishing industry generated 8,815 jobs, an 11% decrease from 2019. Book publishing jobs in Ontario accounted for 69% of the national total, representing 6,130 jobs.^[1]
- In 2020, salaries, wages, commissions and benefits for Canadian book publishers accounted for 26.5% of operating expenses, with a total of \$354.4 million.^[2] Ontario accounted for over \$227 million (or 64%) of national wages, salaries and benefits in 2020.^[3]
- According to survey data collected by BookNet Canada, Canadian publishers had an average of 19.5 full time, and 8.8 part-time employees in 2021.^[4] The Canadian publishers who were included in this study represented approximately 72% of the English-language print book market, with 65% of respondents being small publishers (revenues of less than \$999,999), 26% being mid-sized publishers (revenues between \$1 million and \$9,999,999) and 9% being large publishers (revenues of \$10 million or more).^[5] BookNet's data also suggested that staff make-up stayed flat for the majority (63%) of publishers between 2020-21, while staff count increased for 30% of publishers and decreased for just 8% of publishers.^[6]
- Looking specifically at the Canadian-owned publishing sector, the majority of firms employed between 0-5 employees (62.5%).^[7] On average, salaried employees earned in the range of \$40,000 - \$59,000 annually, with the exception of executive-level staff who earned \$60,000-\$69,000 on average.^[8]
- Notably, new data collected by the Association of Canadian Publishers (ACP) suggests growth in the use of freelance workers, with 6% more respondents reporting working as freelancers as opposed to salaried staff.^[9] Half of all freelance and/or contract respondents in this survey indicated that they earn less than \$30,000 per year on average from earnings related to their publishing work.^[10]
- This data from ACP also highlights that half of all respondents to their survey work in a hybrid model, 40% work entirely remotely, and just 9% of respondents work entirely in-person.^[11] When heads of firm were asked if they plan to keep hybrid or remote arrangements indefinitely, 81% said yes.^[12]
- According to the Publishers Weekly *Industry Salary Survey 2022* (which covers the United States), the median compensation across all types of roles (editorial, sales/marketing, management and operations/production) was USD\$72,500 in 2021, up from USD\$67,300 in 2020.^[13] However, while the gender makeup of the industry remains overwhelmingly female (77%), there is a persistent pay gap, with median compensation for men at USD\$90,000 and

women at USD\$70,000.^[14] While women hold the majority of positions in editorial, sales/marketing and operations/production departments (78%), they represented only 54% of management positions (the highest paid segment of the industry), and the median male respondent tended to have 20 years' experience (compared to 10 years for women).^[15]

REVENUES AND RELATED FIGURES

Note: Unless otherwise indicated, the following figures include all book publishers in Canada, including both domestically-owned and foreign-owned.

- In 2020, the Canadian book publishing industry generated operating revenue of \$1.50 billion, a decrease of 4.4% from 2018. Both operating revenues and operating expenses decreased by 4.4% and 7.4% respectively, resulting in an increased operating profit margin of 10.5% in 2020 compared to 7.5% in 2018.^[16]
- The Ontario book publishing industry's share of these operating revenues is valued at \$979.5 million (representing 65% of the national figure), which is a 5% decrease from 2018.^[17] Similar to the national trend, both operating revenues (\$979.5 million) and operating expenses (\$891.4 million) decreased at different rates (5% and 7.7% respectively), resulting in an increased operating profit margin of 9% in 2020, compared to 6.3% in 2018.^[18]

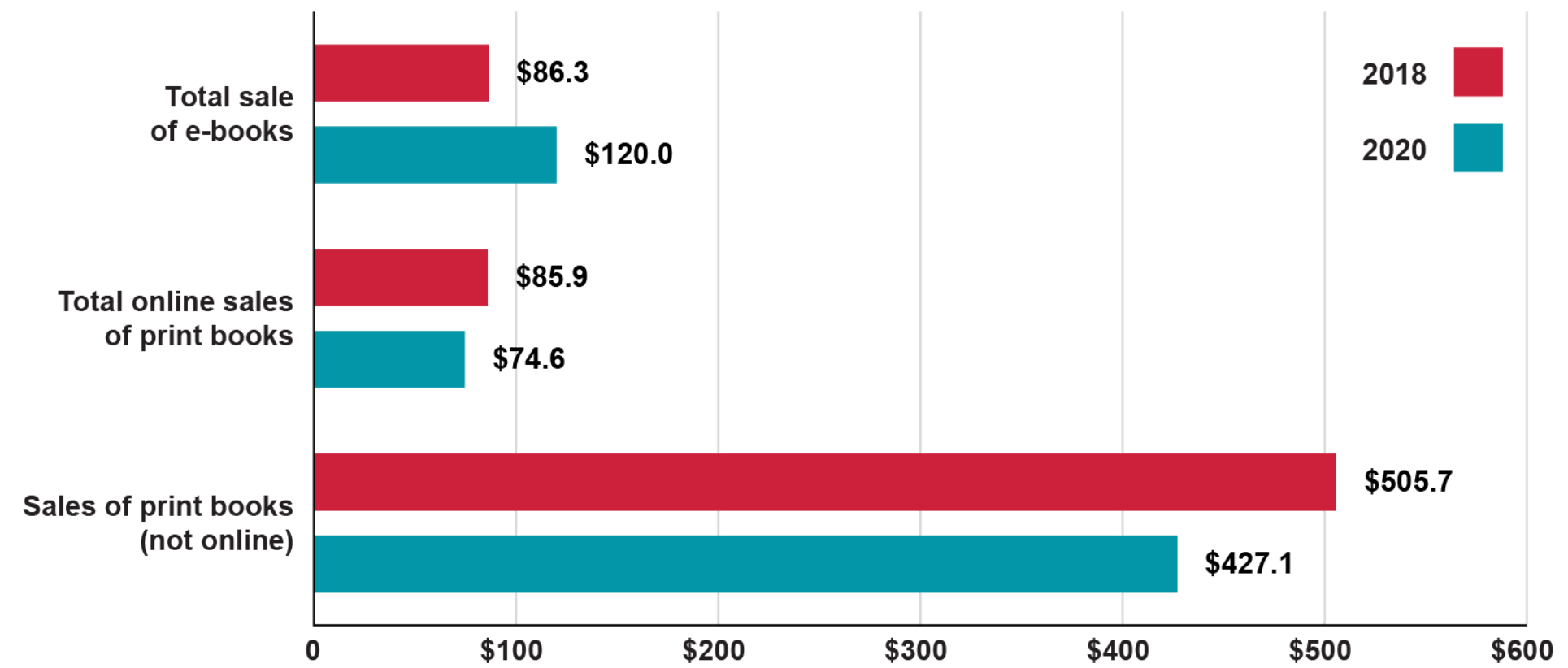


Source: Statistics Canada, Table 21-10-0200-01 – Book publishers, summary statistics. (Released February 22, 2022).

- The Canadian book publishing industry generated \$972 million in GDP in 2020, down from \$1.014 billion in 2019. Of that \$972 million, \$772 million is attributable to GDP generated in Ontario.^[19]
- In 2020, total book sales in Canada represented \$894.7 million. Of that total, print books (including wholesalers, bookstores and general retailers) represented 75% of all sales, while sales of e-books accounted for 15% and online sales of print books accounted for 10%.^[20]
- In Ontario, total book sales generated \$621.7 million dollars, with the total sales of print books not online accounting for \$427.1 million (69%), e-books accounting for \$120 million (19%), and the online sales of print books accounting for \$74.6 million (12%). Notably, there was a significant increase (24%) in the sales of e-books from 2018-2020.^[21]
- According to BookNet's *The State of Publishing in Canada 2021* report, the majority of publishers saw an increase of revenue of between 11%-25% in 2021. Specifically, print book revenues increased for most Canadian publishers (60%), and just over half of all publishers saw increases in e-book revenue in 2021 (52%). Finally, 28% of publishers also saw increases in their audiobook revenue in 2021.^[22] Note: the majority of respondents (65%) to this study were small publishers with gross revenues of less than \$1 million in 2021.
- According to mid-year data for 2022, the Canadian trade print book market sold 22,096,413 units for a value of approximately \$470 million the first six months of 2022.^[23]

CONSUMER MARKET

Book Publishing, Net Value of Book Sales in Ontario, 2018-2020



Source: Book publishers, net value of book sales by customer category (x 1,000,000) (Released February 2, 2022)

- According to the BookNet *Canadian Book Consumer* survey, 4 in 10 book buyers read or listened to a book on a monthly basis.^[24] COVID-19 did have an impact on book buying behaviours in 2021 (47%), but this figure is an improvement from the 62% of respondents who said their book buying was impacted by COVID-19 in 2020.^[25]
- Paperbacks remain the most popular book format purchase, ranging from representing between 45-50% of the books purchased between 2019 and 2021.^[26]
- When asked how they purchased a book in 2021, 58% of buyers said they used an online website, 31% used a retailer in person, and 7% made purchases on a reading device via an app or a built-in e-book/app store.^[27]
- According to BookNet, the major ways book buyers become aware of books in 2022 were through reading other books by the same author/illustrator (22%), browsing either online or in person (20%), or through recommendations and reviews (18%). Other less popular awareness mechanisms included social media, bestseller lists, and interviews.^[28] When buying books in-store, Canadian book buyers were most likely to find the book they purchased on the main shelf (19%), or on a display/promotional table (6%). Online, they were mostly likely to find the books they bought by searching for the specific book (24%), browsing by genre/subject (9%) or browsing by author (5%).
- In 2022, Canadian book buyers bought an average of 2.6 books per month.^[29] In total, 73% of the books purchased by Canadian buyers in 2022 were print books, followed by ebooks (17%) and audiobooks (6%).
- In terms of willingness to explore Canadian content, 34% of book buyers said they searched for books by Canadian authors or illustrators, 28% sought out books about Canada or regions within Canada, 23% sought out books about a group or culture written by people from that group or culture, 13% sought out books about Indigenous peoples and 12% sought out books by Indigenous authors or illustrators.^[30] Moreover, 10% of book buyers sought out books that were either partly or fully written in a language other than English.
- The impact of #BookTok on TikTok on book sales is an ongoing question. Early data from BookNet’s upcoming *Canadian Book Consumer Survey 2022* notes that 21% of Canadian book buyers are currently on TikTok. According to their analysis of 20 backlist titles that trended on #BookTok, sales for these titles increased by 1047% overall, with the median month-to-month sales increase being 2255%.^[31] Notably, backlist titles that were 2-5 years old sold the best in this dataset, while the most popular adult subject was Fiction/Romance.^[32] The platform also has several high-profile partnerships with retailers involving #BookTok displays in retail stores, including Indigo in the Canadian marketplace and Barnes & Noble in the U.S.^[33]
- Adaptations of titles into television shows and films can also drive consumption in terms of sales data and library circulation. According to a study published in 2022 assessing a selection of titles related to 90 book adaptations, the adaptation’s release saw sales increase 212% over a 25-week period (12 weeks before and after the adaptation’s release week). Notably the sales bump was more prominent for titles that were adapted into TV shows (62%).^[34]
- Data on audiobook consumption indicates that 45% of all Canadian readers were audiobook listeners in 2021, which is consistent with 2020.^[35] Overall, 19% of Canadian book buyers bought or accessed an individual audiobook through a

subscription service in 2021.^[36] On average, audiobook consumers were seven years younger than Canadian book buyers, and 14% more likely to live in a city or urban area.^[37] Audiobook consumers were also 23% more likely to participate in YouTube (23%), Twitter (17%), and Instagram (16%).^[38]

TRENDS AND ISSUES

The growth rate of the Canadian book industry is positive according to statistics and will continue on a slight upward trend, according to forecasts from PwC, with electronic consumer books set to grow more rapidly than print and audio formats. COVID-19 has had a number of impacts on the publishing industry that are likely to continue post-pandemic. Diversity, accessibility and environmental sustainability all continue to be important issues in the publishing industry.

GROWTH RATE AND INDUSTRY TRENDS

- According to PwC, Canada's consumer books market was valued at USD \$835 million in 2021, and revenues are expected to rise at a 0.5% CAGR annually until 2026.^[39]
- Revenues associated with print books are expected to rise at a 0.3% CAGR, and print currently makes up the bulk of the Canadian market (65% of revenues in 2021).^[40] Revenues from e-books will rise faster over the same period (1.1% CAGR), but are not anticipated to change the revenue split (currently 32.5% of the market) significantly between 2021 and 2026.^[41]
- Digital subscription services, including audiobook services, are also gaining in popularity in the marketplace. Currently, Amazon Prime/Kindle Unlimited (36%) and Audible (34%) are among the most popular platforms in use in the market, followed by Audiobooks.com (17%), Rakuten Kobo (13%), and Audiobooks Now (11%).^[42]
- A key emerging trend in the post-pandemic period is promising news around the opening of independent bookstores across the country. On average, new stores are opening at a rate of 1 per month, and as of September 2022, there were more than 200 independent bookstores across the country.^[43] In November 2022, the Department of Canadian Heritage, through the Canada Book Fund, introduced a new \$32.1 million investment over two years to help booksellers increase their ability to sell books online.^[44]
- Notably, there has also been the emergence of both brick and mortar and online retailers focused on Indigenous books, reflecting a growing interest in books from First Nations, Inuit and Metis perspectives.^[45] In 2021, the bestselling book by a Canadian author and publishing house was *21 Things You May Not Know about the Indian Act: Helping Canadians Make Reconciliation with Indigenous Peoples a Reality* (Bob Joseph, Page Two Inc.), and the bestselling Canadian fiction title was Michelle Good's *Five Little Indians*, from HarperCollins Canada.^[46]
- The sales of comics and graphic novels continue to grow, with sales up 62% in the first six months of 2022.^[47]

GLOBAL AND DOMESTIC ISSUES

- While book publishers are on the road to recovery from COVID-19, there are still many challenges ahead. According to ACP, paper shortages, competition for press time and ongoing supply chain disruptions have put significant pressure on the resources available to independent book publishers. ACP's data estimates that printing costs alone have increased by 40% over the last three years, alongside increases to packaging and shipping costs.^[48]
- As print sales remain a significant component of the sector's business model, the increasing costs to produce print books is an ongoing concern. Data cited by BookNet CEO Noah Genner in *Publishers Weekly* suggested that while the pre-pandemic period would see an average of 8,000 new ISBNs issued monthly in Canada, the number has fallen to 6,000-7,000 due to high inflation rates and ongoing supply chain pressures.^[49] These concerns also remain acute at the global level. According to *Publishers Weekly*, while supply chain issues improved in some ways into 2022, U.S. production costs remained well above 2019 levels.^[50]
- In August 2022, independent booksellers voiced concerns about timely availability of titles from HarperCollins, noting that delays and errors in orders had become more prevalent due to what was described as a "variety of supply-chain related issues" including space constraints and labour shortages at warehouses.^[51]
- This changing post-pandemic environment has forced many small publishers to adapt the way they do business, including adapting to staff who may be more geographically dispersed due to the prevalence of remote work.^[52] Some publishers saw a need to pivot to international online book launches and more strategic approaches to export, as well as a need to invest in digital operations to support the increased importance of digital sales.^[53]
- Accessibility remains a key priority for the publishing sector, with many new initiatives launching in 2022.
 - The Accessible Publishing Learning Network, led by eBOUND, was launched in September 2022 as an online resource library and community hub designed to assist Canadian publishers in publishing accessible content.^[54] The project, funded by the Canada Book Fund's Accessible Digital Books initiative, is a plain-language repository of curated information about accessible audiobook and e-book production, image descriptions, metadata, digital marketing, website accessibility, and strategic planning.^[55]

- The Literary Press Group launched eBooks for Everyone, a collection of almost 600 newly accessible e-books by Canadian authors. While publisher members of the Literary Press Group were responsible for selecting which of their books to be included, publishers were encouraged to consider works that were typically more expansive to convert to accessible files, including plays, poetry, graphic novels and comic books.^[56]
- Despite a statistically significant improvement from demographic data initially collected in 2018 (85% white), the Canadian publishing industry continues to be lacking in racial diversity, with 75% of respondents identifying as white.^[57] Crucially, while there may have been small improvements at a staff level, there was essentially no change to the racial makeup of heads of firm.^[58] Other key findings from this data include:
 - Almost every department surveyed saw anywhere between a 7-20% increase in respondents who identified as BIPOC, with the exception of executives and interns which saw decreases of 2% and 5% respectively.^[59]
 - The proportion of respondents with a disability increased by 9% since 2019, to 26% in 2022.^[60]
 - 11% fewer respondents identified as heterosexual compared to 2018, and 15% fewer respondents identified as cisgender in 2022.^[61] Overall, the ratio between male and female staff remained identical, both industry-wide and for heads of firm.^[62]
 - Publicity was the least racially diverse department in 2022, with 79% of respondents identifying as white.^[63] Conversely, interns are the most diverse department, with 33% identifying as BIPOC, 78% on the LGBTQIA+ spectrum, and 56% with a disability.^[64]
 - Notably, the percentage of respondents who said their firm currently has diversity, equity and inclusion (DEI) policies and initiatives in place rose by 14% since 2018, and the percentage of heads of firm with plans to implement new DEI policies and initiatives rose by 17% since 2018.^[65]
- Other U.S.-centric data, like PEN America's *Reading Between the Lines: Race, Equity, and Book Publishing* study, has focused on measuring the uneven progress of the Big Five book publishers (Hachette Book Group, HarperCollins, Macmillan, Penguin Random House, Simon & Schuster) with regards to the persistent lack of racial and ethnic diversity in the industry.^[66] The report also developed a series of metrics to evaluate the extent to which much-publicized diversity statements have translated into actual structural change.^[67] These metrics included steps towards action such as whether the public statements were accompanied with the following: the collection and public availability of DEI statistics, the use of specific hiring benchmarks and targets, the addition of DEI officers or related team members, mandatory DEI training, the tracking of equity in author advances, and more.^[68]
- The corporate owner of Simon & Schuster, Paramount Global, has officially announced that it had terminated its agreement to sell Simon & Schuster to Penguin Random House.^[69] The proposed merger, originally announced in November 2020, would have resulted in a new entity accounting for more than 40% of the English-language marketplace in Canada.^[70] In October 2022, a U.S. federal court blocked the acquisition on the grounds that it would "substantially lessen competition in the market for the U.S. publishing rights to anticipated top-selling books".^[71] Specifically, the decision highlighted that the combined companies would sign an estimated 49% of all deals for anticipated top-selling books.^[72]
- Due to the requirements of the Canada-United States-Mexico (CUSMA) free trade agreement, Canada implemented a 20-year extension to the term of copyright protection for author-generated works. The term of copyright will now apply for the lifespan of the author plus an additional 70 years, bringing Canadian copyright term in line with the majority of its trading partners, including the U.S.^[73]
- Globally, the book publishing industry continues to respond to the global climate and energy crisis. Hachette Livre (the parent company of Hachette Book Group) announced a 30/30 strategy, a carbon reduction strategy that aims to cut 30% of the company's carbon emissions by 3030.^[74] In Canada in 2021, 44% of all Canadian publishers had implemented or were in the process of including information in their print books or marketing materials about their use of environmentally-friendly materials.^[75]
- In July 2021, the Supreme Court of Canada issued a judgement on the legal case between Access Copyright and York University regarding reproduction fees on copyrighted materials given to students.^[76] Ultimately, the Supreme Court dismissed appeals filed by both parties, and leaves the Federal Court of Appeal's earlier ruling that tariffs certified by the Copyright Board are not mandatory, in place. According to ACP, the educational sector's interpretation of fair dealing since 2012 has resulted in significant market damage, estimated to be more than \$200 million in licensing revenue.^[77] ACP has called for the federal government to enact legislative reform that encourages fair remuneration of rights-holders for use of copyright-protected works, as well as encourage investment into future Canadian-specific learning resources.^[78]
- The Griffin Poetry Prize eliminated the category reserved for Canadian poets, and is amalgamating both prizes into one, single global Griffin Poetry Prize.^[79] While this new format will make the Griffin Poetry Prize the largest award for a single book of poetry translated into English in the world, Canadian authors have raised that it also means that the award will no longer be specifically awarding poets in Canada, eliminating a key opportunity for visibility and economic stability.^[80]

GOVERNMENT SUPPORT

Note: The information included in this section is an overview of some of the government support to the book publishing sector. This is not intended to be a comprehensive list of government support available.

- The [Department of Canadian Heritage](#) provides funding to the Canadian book industry through the Canada Book Fund (CBF), with two major streams: Support for Organizations and Support for Publishers. The Support for Organizations stream also includes the Accessible Books Initiative, as well as the new two-year Booksellers Initiative, while the Support for Publishers stream includes Business Development and Publishing Support streams.
- A new campaign from the Association of Canadian Publishers is asking the federal Department of Canadian Heritage to meet its currently unfulfilled 2021 election commitment to increase the Canada Book Fund budget by 50%.^[81]
- Ontario publishers have access to provincial funding through several Ontario Creates programs and a tax credit: the [Book Fund](#), the [Export Fund](#) and the [Ontario Book Publishing Tax Credit](#) (OBPTC). Through its [Industry Development Program](#), Ontario Creates also provides support to book industry organizations for events and activities that stimulate growth of the industry, including the educational market.
- The 2022 Ontario budget included a permanent legislative amendment to the Ontario Book Publishing Tax Credit. First introduced as a COVID-19 measure, the legislative amendment permanently removes the requirement for books to be published in an edition of at least 500 bound copies (except for books published prior to 2020).
- Other funding mechanisms at the federal and provincial levels include the [Canada Council for the Arts](#) and the [Ontario Arts Council](#) (with the Literary Creation Projects grants, the Literary Organization Projects grant, the Literary Organizations: Operating grant and the Publishing Organizations: Operating grant).

INDUSTRY RECOGNITION

Ontario authors and publishers are frequently lauded for their outstanding work:

- The Trillium Book Award / Prix Trillium encourages excellence in literature by investing in Ontario-based writers. Ontario Creates is proud to announce the winners of the 2023 Trillium Book Awards, honouring four Ontario authors with the province's most prestigious literary prize.
 - Trillium Book Award: *The Book of Grief and Hamburgers* by Stuart Ross (ECW Press)
 - Trillium Book Award for Poetry: *My Grief, The Sun* by Sunna Wani (House of Anansi Press)
 - Prix Trillium: *Circé des hirondelles* by Gilles Lacombe (Éditions L'Interligne)
 - Prix du livre d'enfant Trillium: *Le secret de Paloma* by Michèle Laframboise (Éditions David)
- Several Ontario publishers saw their books named to the 2022 Scotiabank Giller Prize shortlist, including [Coach House Books](#) for two novels. The winning book, *The Sleeping Car Porter* by Suzette Mayr was published by [Coach House Books](#).
- Several Ontario publishers won awards at the CCBC Book Awards, including *The Power of Style: How Fashion and Beauty Are Being Used to Reclaim Cultures* by Christian Allaire and Jacqueline Li, ill. ([Annick Press](#)) and *Elvis, Me, and the Lemonade Stand Summer* by Leslie Gentile ([DCB Young Readers](#)).
- Toronto writer and director Sarah Polley won the 2022 Toronto Book Award for her book, *Run Towards the Danger: Confrontations with a Body of Memory* ([Hamish Hamilton](#)).

Profile current as of February 13, 2023

ENDNOTES

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- ⁴⁹ Ed Nawotka, “Publishing in Canada 2022: Canadian Publishing Adapts to New Challenges”, *Publishers Weekly*, September 23, 2022.
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