



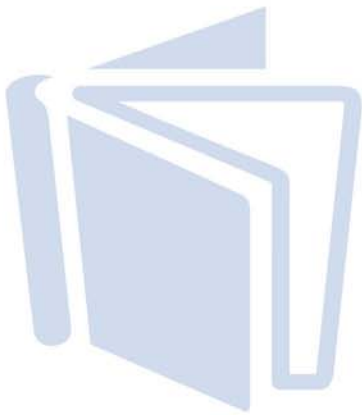
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Overview of CBF-Recipient Web Sites



Executive Summary

This report is based on information gathered through a 2010 review of Canada Book Fund (CBF) recipient publisher Web sites by Canadian Heritage, and serves a similar function to the *Publishing Measures* reports, which provide Canadian book industry benchmarks for financial analysis ratios by company size, market segment, etc. The present report was distributed to CBF recipients on January 14, 2011.

The Web presence of the Canadian publishing industry was observed across a broad range of categories, explained in detail in Annex A. Annex B provides a short list of useful Web techniques employed by both industry leaders and CBF-recipient publishers that have the potential of increasing Web presence and title discoverability online.

Study objectives

This Web site overview had two primary objectives:

1. Observe the scope of the online presence of Canadian publishers;
2. Build off the benchmark 2008 data to provide ongoing analysis of the Web presence of CBF-recipient publishers.

This report also includes some comparison analysis between the 2008 and 2010 studies. In the Notes section following each Figure, there are references to specific shifts over that period. Figure V also presents a selection of Web features that displayed significant changes between 2008 and 2010. This analysis reveals some noteworthy advances in several areas by CBF recipients over the two-year period.

Recipient Web presence 2010

- CBF publishers whose Web sites feature social networking tools reported third-party Web site sales, e.g. Amazon.ca, that were significantly higher (between 70% and 90%) than publishers who did not use these tools.
- A total of 57% of recipients were selling print and/or digital content through their own Web sites in 2010.
- CBF publishers who offered eBooks reported substantially higher sales (81% and 92%, respectively) through their own Web site than those who did not.

Best practices for industry consideration

The use of several specific features can contribute to the functionality and commercial potential of a publisher's Web site, such as:

- social media marketing techniques
- enriched author information
- e-commerce capability
- a search function

Methodology

Overview

The study looked at not only what information was available on the Web site, but also how the information was presented and how easy it was to access. If a particular feature was exceedingly difficult to find, it was not counted in the grid.

Publishers not included in this survey

Of the over 200 recipient publishers, all but 14 were included in the survey. The three most prevalent reasons for exclusion were the following:

- No Web site available.
- Web site under construction.
- CBF-recipient in the 2007-2008 program year but not in the 2010-2011 program year.

Limitations to methodology

Capturing the range of content available on CBF publisher Web sites in a grid presented certain limitations.

1. Sample sizes for a number of publisher categories were small. For example, only nine publishers were in the scholarly market segment; only 29 were in the \$5M+ revenue category. This means outliers and low statistical significance could be factors which affect the results.
2. The grid used for this survey implies that the absence of any particular feature represents a deficiency. While this is often true, occasionally certain features may not be appropriate or possible for every publisher Web site. For example, some Web sites lack reviews not because the publisher failed to display these on the Web site, but because no reviews for any works have been written. Similarly, a publisher of children's books, for example, may not have e-books for purchase because the publisher may have determined that the e-book format is not an appropriate medium for its titles.

Figure I: Publisher Information	Publisher										
	Revenue (2009-2010)				Language of Web site			Market Segment			
	< 200K	200K < 1M	1M < 5M	5M+	FR	EN	BI	Trade	Educational	Scholarly	Hybrid
English	10%	44%	35%	11%	0%	92%	8%	72%	18%	5%	5%
French	3%	48%	31%	17%	88%	0%	11%	67%	21%	3%	8%
Scholarly	11%	33%	44%	11%	11%	67%	22%	0%	0%	100%	0%
Hybrid	15%	54%	23%	8%	46%	38%	15%	0%	0%	0%	100%
Trade	8%	48%	29%	14%	38%	59%	3%	100%	0%	0%	0%
Educational	0%	35%	50%	15%	43%	48%	10%	0%	100%	0%	0%
Revenue < 200K	100%	0%	0%	0%	13%	80%	7%	80%	0%	7%	13%
Revenue 200K < 1M	0%	100%	0%	0%	42%	53%	4%	75%	15%	3%	7%
Revenue 1M < 5M	0%	0%	100%	0%	36%	56%	9%	61%	29%	6%	4%
Revenue 5M+	0%	0%	0%	100%	45%	52%	3%	72%	21%	3%	3%

Note on Figure I

- Figure I provides a basic overview of the publishers whose Web sites were studied in 2010.
- The information provided in this table is designed to introduce the survey population of this study, and the means by which data will be presented.
- The figures within this table (and in those following) identify the percentage of surveyed Web sites that display characteristics identified on both the vertical and horizontal axes. For example the 10% figure in the top left corner is the percentage of recipients' Web sites who publish in English and have revenues under \$200,000.

Figure II: Product Information	Product Information												
	Basic		Author				Excerpts			eBooks		Reviews	
	Cover	Description	Internal Author Page	Author Picture	External Author Page	Works	Table of Contents	Full Excerpt	Audio/Video	Free	Pay	Critical Review	Reader Review
English	86%	85%	70%	39%	8%	57%	18%	13%	11%	4%	5%	33%	42%
French	93%	92%	50%	28%	3%	37%	17%	10%	5%	5%	5%	14%	14%
Scholarly	89%	89%	67%	11%	0%	67%	33%	0%	11%	0%	0%	56%	44%
Hybrid	85%	92%	46%	31%	0%	38%	15%	15%	8%	0%	0%	15%	15%
Trade	93%	91%	73%	44%	9%	56%	14%	12%	10%	3%	5%	29%	35%
Educational	75%	75%	25%	5%	0%	23%	30%	15%	3%	13%	8%	5%	15%
Revenue < 200K	93%	93%	67%	33%	0%	47%	13%	13%	7%	0%	0%	20%	27%
Revenue 200K < 1M	88%	88%	65%	39%	4%	49%	15%	14%	11%	3%	3%	22%	27%
Revenue 1M < 5M	87%	87%	57%	24%	9%	49%	19%	9%	6%	6%	9%	27%	30%
Revenue 5M+	93%	86%	59%	45%	10%	48%	28%	14%	10%	7%	3%	31%	45%

Note on Figure II

- Figure II provides a comparison of the breadth of product information displayed online.

Change in Web presence, 2008-2010

- Educational publishers displayed a 10% increase in the use of free eBooks. This increase is more than double that of any other publishing group for this feature.
- CBF-recipient publishers displayed an average 20% increase in reader reviews. This indicates a shift toward customer-to-customer interaction on their Web sites. A similar shift can be noted in Figures III and V, which demonstrate expanded social networking use by CBF publishers.
- CBF publishers who offered Free and Pay eBooks reported substantially higher salesⁱ (81% and 92%, respectively) through their own Web site than those who did not.ⁱⁱ

Figure III: Social Networking and E-commerce	Social Networking								E-commerce		
	Amazon Wish List	del.icio.us	Digg	Facebook	Twitter	YouTube	MySpace	Stumble Upon	Onsite		Offsite
									Fully E-commerce Enabled	Mail Order Form	Online Retailer (link to)
English	9%	11%	11%	26%	21%	20%	7%	10%	67%	9%	15%
French	5%	3%	5%	13%	12%	8%	5%	5%	53%	5%	2%
Scholarly	33%	33%	33%	33%	33%	44%	33%	33%	44%	0%	22%
Hybrid	8%	8%	8%	38%	31%	31%	0%	8%	69%	8%	0%
Trade	7%	9%	10%	21%	18%	15%	7%	8%	63%	7%	12%
Educational	0%	0%	0%	10%	8%	3%	0%	0%	58%	8%	0%
Revenue < 200K	0%	0%	0%	0%	7%	7%	0%	0%	60%	7%	27%
Revenue 200K < 1M	7%	6%	7%	20%	16%	15%	7%	7%	56%	8%	8%
Revenue 1M < 5M	7%	9%	9%	23%	19%	16%	6%	7%	66%	6%	4%
Revenue 5M+	10%	17%	17%	28%	24%	17%	7%	14%	69%	7%	17%

Note on Figure III

- Figure III compares the breadth of community building functions through the utilization of social networking and e-commerce functions.
- Each of the categories under the broad heading of Social Networking – i.e. Digg, Facebook, StumbleUpon – are online social networking sites that can be utilized by Canadian publishers to reach new markets.
- E-commerce is also broken down into functions available on the publisher’s site directly and other sites to which consumers may be directed.

Change in Web presence, 2008-2010

- Scholarly publishers increased their usage of social networking sites del.icio.us and MySpace from 0% in 2008 to 33% in 2010. This shift is further demonstrated in Figure V, which displays a marked increase in social networking functionality by all CBF recipients.
- CBF-recipient publishers displayed a 12% increase in the use of e-commerce from 2008 to 2010. This indicates an ongoing commitment on the part of CBF recipients to pursuing online sales channels through their Web sites.
- CBF publishers whose Web sites feature social networking tools reported median third-party Web site sales, e.g. Amazon.ca, Archambaut.ca, that were significantly higher (between 70% and 90%) than publishers who did not use these tools.

Figure IV: Marketing and Promotion	Marketing and Promotion										
	Onsite									Offsite	
	Passive Filtering	Associated Products	Catalogue (downloadable)	Catalogue (searchable)	Feature Products	Awards Promotion	Contests	Special Sales Offers	Blog/ Press	Newsletter/ Email Alerts	RSS
English	12%	24%	52%	35%	72%	33%	7%	25%	37%	39%	10%
French	17%	27%	36%	42%	65%	22%	9%	14%	14%	19%	9%
Scholarly	22%	33%	44%	44%	44%	22%	0%	11%	33%	33%	33%
Hybrid	23%	15%	54%	38%	69%	23%	8%	23%	31%	38%	23%
Trade	16%	29%	45%	39%	70%	33%	9%	20%	32%	31%	7%
Educational	5%	15%	45%	30%	70%	15%	5%	23%	10%	25%	8%
Revenue < 200K	13%	27%	60%	27%	60%	33%	7%	40%	20%	27%	0%
Revenue 200K < 1M	13%	20%	43%	35%	69%	23%	7%	20%	22%	23%	8%
Revenue 1M < 5M	14%	27%	46%	40%	67%	27%	9%	17%	34%	33%	11%
Revenue 5M+	21%	38%	45%	48%	76%	45%	7%	21%	34%	52%	14%

Note on Figure IV

- Figure IV illustrates the breadth of marketing and promotional features on Canadian publishers' Web sites.

Change in Web presence, 2008-2010

- Trade publishers have displayed a 10% increase in the use of associated products from 2008 to 2010. This is a noticeably higher increase than other categories of publishers, and provides an indicator of the diversification of product offerings from CBF trade publishers online.
- CBF recipients have displayed an 11% increase in the use of passive filtering from 2008 to 2010. This is an indicator of CBF recipients seeking to maximize their online sales through on site marketing of titles.
- In 2010-2011, CBF recipients who used a Feature Products tool reported 75% higher sales through their own Web site than those who did not. Recipients who used a Searchable Catalogue reported 50% higher sales through their own Web site than those who did not.

Figure V: Change in use of Web features over time, 2008 to 2010	Social Networking			Marketing and Promotion	Review	Accessibility of Information	
	Facebook	Stumble Upon	Digg	Passive Filtering	Reader Review	Feedback	Search Function
English	20%	10%	11%	11%	33%	16%	13%
French	4%	2%	2%	11%	0%	11%	16%
Scholarly	33%	33%	33%	8%	30%	5%	29%
Hybrid	25%	8%	8%	23%	15%	23%	8%
Trade	13%	7%	7%	13%	25%	18%	17%
Educational	8%	0%	0%	3%	-2%	-2%	4%
Revenue < 200K	0%	0%	0%	13%	12%	27%	-12%
Revenue 200K < 1M	10%	6%	5%	12%	20%	18%	11%
Revenue 1M < 5M	20%	6%	7%	10%	20%	14%	21%
Revenue 5M+	17%	14%	17%	14%	20%	-8%	22%

Note on Figure V

- Figure V displays the change in selected Web features from the initial Web survey in 2008 to the current survey in 2010.
- The categories selected are some of the fastest growing areas of Web design at present, and show that CBF recipients have increased their use of these features accordingly.
- The results above indicate both a commitment on the part of CBF recipients to continuous Web development and an emphasis on front and backlist discoverability through Web-based channels.
- Statistical analysis suggests that the results of this commitment, revealing that CBF recipients displayed a 15% increase in sales through their own Web sites over the last three years. Further, 57% of 2010-2011 CBF recipients reported sales through their own Web sites, an increase of 11% over two years.

Annex A: Definition of Selected Metrics

- *Associated products*
A listing of similar/associated works alongside the displayed title (also known as *passive filtering*). Listings of works displayed simply by the fact that they were by the same author did not count for this category (these were instead captured in the “author works” category).
- *Author works*
The authors’ works are listed together in one place.
- *Awards promotion*
A focus on the Web site on promoting the presence of published titles as nominees/winners for literary awards.
- *Blog/press*
The administrator manages a blog or displays regular updates on relevant information somewhere on the Web site.
- *Community-building functions*
This includes both social bookmarking and social networking sites.
 - Social bookmarking allows users to store and manage data from a variety of sites or sources in a single place. This survey included the following social bookmarking tools:
 - Amazon.com Wish List, del.icio.us, digg, Reddit, StumbleUpon, Twitter
 - Social networking sites included in this survey are the following:
 - MySpace – A social networking site based around the sharing of creative content. With free registration, it allows for the social dispersion of cultural content online.
 - Facebook – A social networking site based around the creation of an online social community. Users can link Web content to one another through the platform, and Web sites can provide mediums for ‘sharing’ through this online resource.
 - Twitter – A micro-blogging platform that allows users to ‘follow’ the running posts of individuals and organizations. Used in the private sector as a form of online press release.
 - This survey also included publishers’ presence on YouTube. The video-sharing site allows for content to be ‘embedded’ on publishers’ Web sites, i.e. a video within the site, and provide links to videos on YouTube. Further, this study observed the presence of several publishers with YouTube Channels, an independent site within YouTube allowing the publisher to provide a video library.
- *Critical reviews*
Reviews from literary critics.
- *Description*
A qualitative summary of, or introduction to, titles featured on the Web site. This description goes beyond simply listing quantitative data such as page or ISBN number.

- *Downloadable Catalogue*
A catalogue of the publisher's titles can be downloaded.
- *E-books*
Refers to any digital text format (ePub, PDF, txt, etc.) that can be displayed on a digital reader, such as the Kindle, Kobo, iPad, Nook or Sony Reader.
- *E-commerce enabled*
Works can be purchased with credit card or through an online money transfer agent (such as PayPal).
- *Feedback*
Feedback is explicitly solicited and a feedback box or email address is provided to contact the Web administrator. "Contact us" features were not surveyed (as all Web sites provided some means for contact electronically).
- *Feature products/author*
Selected authors or their works are highlighted prominently on the Web site.
- *Full excerpt*
One that allows the reader to preview the body of the text (such as a sample chapter, sample pages, etc) beyond simply the table of contents. Can exist in a variety of formats, such as Google reader, PDF, or simply a passage from the text typed onto an HTML page.
- *Internal author page/ author profile*
A description of the author that has at least a minimal level of substantive content (i.e. more than just a sentence or two).
- *Language*
Refers to the language (or languages) of the Web site's interface (and not the titles carried).
- *Links to online retailers*
A direct link to the page where the item can be purchased on another Web site is provided. For example, not simply providing a link to Amazon's home page, but providing a link to the page on which the title is actually listed.
- *Online (searchable) Catalogue*
A catalogue of the publisher's titles which can be sorted, i.e. by title, author, ISBN, by the user.
- *Passive filtering*
A listing of works that previous people who have purchased or viewed the displayed title have also purchased or viewed. For example, "people who bought/viewed this book also purchased..."

- *Reader reviews*
Reviews or ratings from the general public through a platform based on the publishers Web sites.
- *RSS*
A family of web feed formats used to publish frequently updated works—such as blog entries, news headlines, audio, and video—in a standardized format. An RSS document includes full or summarized text, as well as metadata (such as publication dates and authorship).
- *Special sales offers*
The use of discounts to increase consumer demand for certain titles, genres, authors, etc.

Annex B: Best Practices for Industry Consideration

A Web site that is informative, interesting, interactive, easily navigable and attractive, should stimulate more visits and online sales. Web 2.0 features have the potential to overcome current impediments to consumers buying books online. The more information on a title that is available and the better the excerpt/preview features, the closer a consumer can come to approximating the experience of buying a book in a bricks-and-mortar store. Metadata may allow publishers to better realize this potential. Web sites provide a means for publishers, especially those that are small and regional, to connect with an otherwise elusive global audience.

Certain strategies that are increasingly being used by CBF publishers represent key building blocks to a publisher's successful Web presence. These do not represent a definitive means for success, but rather a series of industry best practices that have been successfully used to date.

The three most prevalent best practices are as follows:

1. If titles are available through other online retailers (but not on the publisher's site itself) a direct link to the third party source should be provided.
 - For example, instead of simply providing information on where the work can be purchased, provide a direct hyperlink to the work on the third party site.
2. The use of hyperlinks to guide consumers through the site is recommended. References to information or features contained within the site can be linked, providing the consumer with ease of navigation.
 - For example, hyperlinks to authors and titles can be created at every point where the names of the author or title appear.
3. The use of several specific features can also contribute to the functionality and commercial potential of a publisher's Web site:
 - I. Cover and description of each available (and forthcoming) work.*
 - This provides potential customers with a baseline of information on all listed titles, and provides an effective framework upon which a Web site can be built.
 - II. Use of active and passive social media marketing techniques.*
 - Active social media marketing involves establishing a presence on a social networking grid, i.e. Facebook page, Twitter account, YouTube channel.
 - Passive social media marketing involves the ability for users to link Web content to social media platforms, i.e. a share button with links to a variety of social networking platforms.
 - The use of one or both of these methods will increase the marketing and promotion potential for a Web site, and increase title discoverability online.
 - III. Author information.*
 - Includes a listing of works and either a dedicated profile (with picture audio and/or video elements) or a link to a profile on an external site.

- This provides further depth of content within the Web site, and more detail on the title list available. It also allows users to view multiple works by the same author, which increases the potential for online discoverability of content.

IV. Excerpts.

- Provides users with the ability to interact with the work in part/whole prior to purchasing. Will allow for potentially increased consumption.

V. Critical and reader reviews.

- Provides the opportunity for customers to get a better understanding of content from third party resources.

VI. E-commerce.

- Allows consumers to purchase on the publisher's site (through a 'buy now' or 'add to cart' button). This ability eases discoverability and consumption of content through the publisher's Web site through ease of access.

VII. Maximized marketing and promotion features.

- A multifaceted marketing and promotion campaign can significantly increase the level of discoverability and sales on a publisher's Web site.
- Includes (at least) a downloadable/searchable catalogue, feature products, and passive filtering.
- This can include the use of special promotions and user engagement features, such as a newsletter or RSS feed notifying users of site updates.
- This can also include the use of social media marketing functions.

VIII. Search function.

- Allows for ease of navigation and the ability for the user to access every portion of the site. This also helps to maximize discoverability.

IX. First appearance in a Google search.

- Greatly improves the accessibility of the publisher to potential consumers.

Notes

ⁱ All references to CBF recipients' online sales (third party retail or own Web site) are derived from approximations provided by CBF recipients as part of their Publishing Support applications in 2010-2011 (and, where applicable, in prior years).

ⁱⁱ All references to the relationship between Web features and the online sales of CBF recipients (third party retail or own Web site) are designed to suggest potential correlation and not causal attribution. While a causal relationship between certain Web functions and online sales may exist, it is impossible to draw any conclusions at this time based on the available data.