



# Steps to a Sustainable Future



An Evidence-Based Report on the Economic and Cultural Impacts  
of British Columbia's Book Publishing Sector, Market Trends and  
Opportunities for Growth

August 2025

# Acknowledgements



This report was commissioned by The Association of Book Publishers of British Columbia (Books BC) and was made possible by funding from Creative BC.

Books BC would like to thank the staff at BC Arts Council and BookNet Canada for their generous cooperation over the course of this project. We would also like to thank all those who participated in the online survey as part of this study.

# Table of Contents

<b>Introduction</b>	<b>6</b>
Methodology	6
Who We Heard From	7
<b>BC's Book Publishing Landscape</b>	<b>8</b>
Understanding the Terrain	8
Steady Output	9
From Manuscript to Marketplace: The Value Chain	10
Characteristics of the BC Publishing Industry	12
Composition of the BC Book Publishing Industry	12
BC Book Publishers are Cultural Anchors in a Changing World	13
BC Books for BC Readers	15
Audience and Market Reach	15
Funding and Policy Environment	16
<b>Challenges Facing BC Book Publishers</b>	<b>18</b>
Cost Pressure	18
Pricing Limitations	20
Funding Concerns	20
Artificial Intelligence	20
<b>Ability to Meet Challenges and Opportunities for Growth</b>	<b>21</b>
Adapting to Cost Pressures and Finding Efficiencies	22
Growth in Book Exports	23
Opportunities for Growth: New Markets and Local Markets	23
BC Book Publishers are Ready to Meet Opportunities	25
<b>The Way Forward: Next Steps for a Stronger Industry</b>	<b>26</b>
Conclusion	27
<b>Appendix</b>	<b>28</b>
BookNet Canada Data	28
About the Metadata in BNC	28
Core Economic Indicators	30
Jobs/Employment	30
Survey Overview	31

# Executive Summary

BC's book publishing industry is dynamic and entrepreneurial, highly supportive of BC authors and illustrators, and brings experience and energy to meet the challenges ahead. Characterized by their resilience and variety across a wide range of genres,<sup>1</sup> publishers reach a diversity of audiences and varied markets.

BC book publishers are proactively expanding their market opportunities while managing rising cost pressures. Supportive government policy and sustained funding will continue to ensure that publishers are equipped to meet the challenges ahead and that the full range of the ecosystem remains vibrant.

## Key Findings

### A Supportive and Evolving Ecosystem

Across the value chain, BC publishers of all sizes are testing new models and markets and deepening their reach to changing audiences. They demonstrate a high level of resilience to volatile market conditions, adapting to new opportunities.

### BC's Book Publishers Support BC Culture

BC publishers help communicate and preserve BC culture through a diverse range of genres and a commitment to publishing Indigenous authors as well as directly supporting BC authors, with at least 40% of their available products<sup>2</sup> by BC authors.

### What's at Stake and the Way Forward

BC book publishers are Canadian-owned and entirely independent. Publishers are central to the network of authors, illustrators, retailers, libraries, media, and readers in BC. The risk of eroding this industry would impact more than the publishing companies and their employees; it limits independent voices that serve BC readers.

---

<sup>1</sup> BookNet Canada (BNC) tracks genre using the Book Industry Standards and Communications (BISAC) classification system.

<sup>2</sup> Available products are defined as active titles in the marketplace in a given time period. See details on BNC in the Appendix.

<sup>3</sup> BC's Book Publishing Tax Credit program, set to sunset in March 2026 is directly tied to the Canada Book Fund funding.

# Key Challenges

## Publishers Face Mounting Financial Challenges

Publishers are experiencing cost pressures that threaten their existence. Their scale limits their access to funding and that lack of capital limits their ability to grow.

## Stagnant Federal Funding is Limiting Growth

While current funding programs offer flexibility, federal support has not kept pace with inflation. As the provincial tax credit for book publishers access is linked to federal levels, provincial support has also stagnated.<sup>3</sup>

## Export Gains May Stall

Gains realized through increased export activities over an eight-year period may lose momentum during trade uncertainty.

# Key Supports Needed to Strengthen the Industry

- Stabilization of the BC Book Publishing Tax Credit and lifting the March 2026 sunset date.
- Sustained operational funding from BC Arts Council, increased to meet inflationary pressures.
- Ongoing Creative BC funding to support export activities and other initiatives.

# Introduction

This report is commissioned by Books BC and conducted by Deetken Insight. It provides a data-supported economic and cultural profile of BC's publishing industry to support advocacy and inform long term business innovation.

Established in 2006 and based in Vancouver, BC, Deetken Insight is a trusted advisor to many clients in both public and private sectors. In partnership with Notio Media, Deetken Insight has led a range of research projects for creative sectors in BC and other provinces.

Founded in 1974, The Association of Book Publishers of British Columbia (Books BC) is a trade association that supports its members through advocacy, marketing, promotion and awareness, and business development. The organization works to highlight the importance of a thriving independently-owned publishing industry in our province, as well as to raise the profile of BC books.

## Methodology

This report was informed by two key data sources:

- 1) a custom-designed online survey distributed to 46 book publishers in BC.
- 2) customized administrative data about BC publishers from BNC.

Additional data is from Creative Industries Economic Results Assessment (CIERA™) results and several Statistics Canada tables.

Finally, desk research informed a Canada-wide perspective on the Canadian publishing industry, with notable recent reports from:

- Nordicity: Profile of the Canadian Book Publishing Industry, May 2023.
- Canadian Heritage: Evaluation of the Canada Book Fund 2018-19 to 2022-23.
- BookNet: Canada's State of the Industry, 2023.

## Who We Heard From

Books BC distributed a custom survey to 46 BC book publishers (including their 26 Books BC members) from November 2024 to January 2025 with 32 companies providing responses. Verbatim responses are displayed in *blue italicized font*.

Through BNC, 42 BC-based book publishers' products and sales data were represented in the report findings. Of those 42 publishers, 24 of 26 Books BC members are included in the dataset.



## A Note about Tariffs

Canada US tariff negotiations were ongoing during this research project. While some survey respondents mentioned concerns during the late 2024 infield survey period, continued uncertainty is impacting all parts of the value chain.

As at publication of this report, the threat of tariffs on books has BC publishers concerned about supply chain disruptions, leading to increased costs and reduced availability of BC books in the US market, which could lead to reduced profitability and fewer market opportunities, particularly for authors.

# BC's Book Publishing Landscape

## Understanding the Terrain

*“The BC publishing industry is comprised of a diverse group of dedicated and innovative publishers. From smaller publishers focused on specific genres and markets to larger publishers and distributors, this is a vibrant industry that has flourished far from the centre of the publishing universe. BC publishers have been successful because of their determination and commitment to publishing BC stories.”*

BC's book publishing industry has grown steadily for decades, with James Jardine (Jim) Douglas establishing the first independent publisher in 1963 and publishing titles under what would later become renowned Canadian publisher Douglas & McIntyre that are still available in the Canadian market. Characterized by companies that range from small businesses to enterprise level, the majority of BC's 46 book publishers are located in major centres Victoria and Vancouver, with other operations in the Gulf Islands, the Okanagan, and on the Sunshine Coast.

A 2023 study commissioned by the Department of Canadian Heritage<sup>4</sup> identifies 428 active publishers in Canada, evenly split between French and English language publishers.

What makes BC's publishing industry unique among Canadian publishers is their independence outside the traditional centre of publishing. While second only to Ontario in volume of English language titles produced, BC book publishers are unique in their independent ownership,<sup>5</sup> pioneering spirit and steady growth over decades.

Taken together, an ecosystem of small, mid-size and larger publishers work collaboratively across the value chain, building on their long presences in BC and their niche specializations. In particular, the large and mid-size publishers are taking advantage of efficiencies and economies of scale. The BC book publishing industry is composed primarily of small to mid-sized firms, with over 80% of surveyed publishers reporting annual revenues below \$3 million, including a notable share (eight publishers) earning under \$100,000.

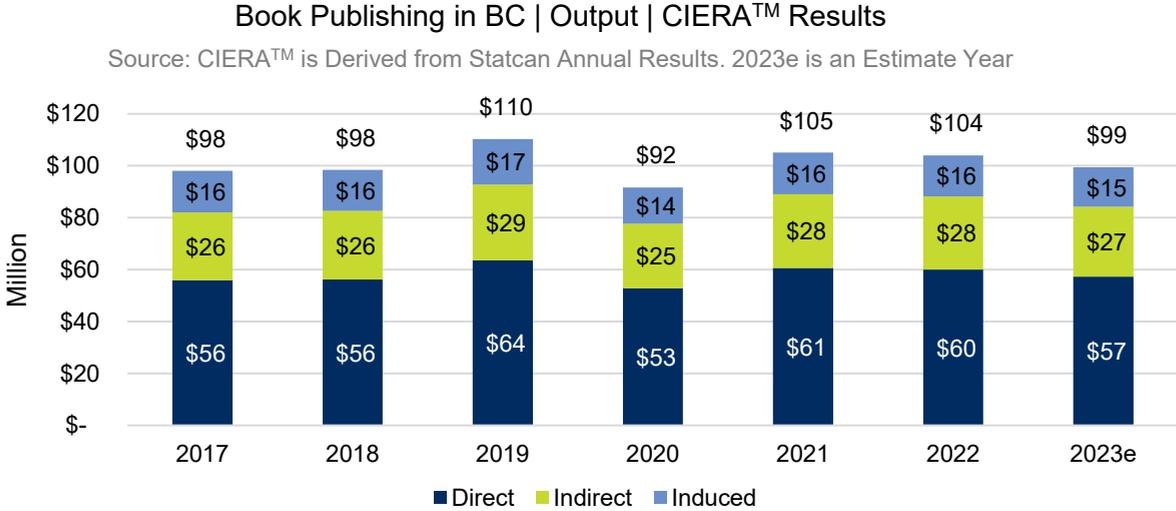
---

<sup>4</sup> Nordicity: Profile of the Canadian Book Publishing Industry, May 2023.

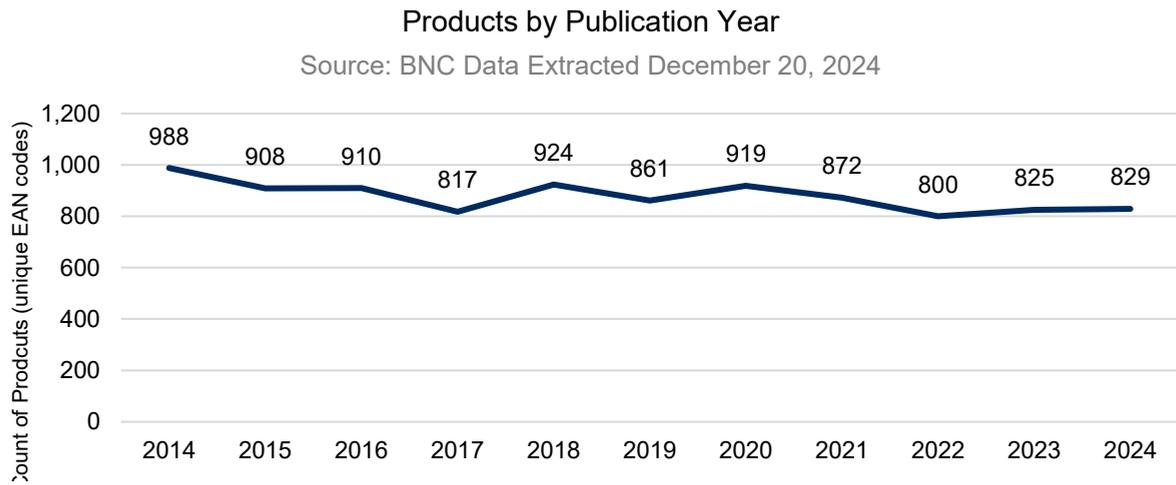
<sup>5</sup> There are no multinational publishers with operations based in BC.

# Steady Output

Amidst changing markets and cost pressures, BC-based publishers have maintained fairly consistent levels of output, with recent declines observed as measured by CIERA™, a proprietary economic measurement tool from Creative BC.



From a product perspective, declines are observed over time which suggests that publishers are producing fewer new unique titles and/or product variations over time. This chart shows 42 publishers whose titles are tracked by BNC.



## From Manuscript to Marketplace: The Value Chain

The book publishing value chain consists of several interconnected stages, each adding value to the final product (the book). Below are the key components of this value chain and examples of BC book publisher innovation noted in blue text.

### Content Creation

Authors, illustrators, and researchers produce content, literary agents represent authors, and publishers acquire manuscripts. Through this stage, **value is created by publishers who develop their brand reputation by acquiring high-quality content that aligns with market demand.**

**Innovation:** Alongside the traditional literary agent model, an emerging non-traditional model includes hybrid, paid publishing services, self-publishing, and social publishing. Where traditional publishing takes on the financial risk for authors who hold various rights, non-traditional publishing shares the risk to get a book to its market. Local examples in BC include Figure 1 Publishing and Page Two Books.

**At Stake:** Financial risk in traditional content creation models is increasing due to overall rising costs.

### Editorial & Production

Editing, design, typesetting, and printing/digital production take place. Through this stage, **value is created by high editorial and design quality which enhances a book's appeal, credibility, and readability, contributing to sales potential.**

**Innovation:** Printing models are changing, with increased use of print-on-demand services to reduce costs and waste. Alternative formats like e-books open new markets for publishers who can take advantage of digital distribution similar to other creative products, opening global markets and driving down distribution costs.

**At Stake:** Printing costs are significant and exacerbated by a high rate of returns.

## Marketing & Publicity

Book reviews, media outreach, book launches, author tours, advertising and social media are used to generate interest. In this stage, **value is created through effective marketing which amplifies awareness and creates demand, driving sales and enhancing brand value for both the publisher and the author.**

Innovation: Marketing is flexibly directed towards niche markets, serving readers in retail environments that are not just bookstores, and with events and readings taking place outside the bookstore/library ecosystem. Books BC public marketing campaign, Read Local BC, plays a role in marketing by generating copy for media outlets via a BC bestseller list, notable book lists, and other title highlights.

At Stake: Declining traditional media coverage reduces both the reach and visibility of new titles.

## Distribution & Retail

Wholesalers, distributors, and sales reps connect publishers with retailers (bookstores), libraries, and online platforms, including Amazon and Indigo. Most publishers also offer direct sales through their own websites. **Value is created with strong distribution networks that increase accessibility to market, and optimization of digital platforms and metadata feeds to ensure books reach their target readers efficiently.**

Innovation: Increased direct to consumer sales through publishers' ecommerce sites, social media and niche interest sites are generating new revenue streams for BC book publishers.

At Stake: Distribution is more fragmented, forcing publishers to continue to serve traditional approaches while building out capacity to reach audiences through digital platforms.

## Sales & Revenue Generation

Authors receive royalties, and publishers may license foreign rights and adaptations to new markets. **Value is created by monetizing content through multiple revenue streams and increases financial sustainability.**

Innovation: Increased presence in global markets has generated new revenue streams for BC publishers.

At Stake: Copyright protections are key to generating lasting value. Publishers are seeking reform of the Copyright Board.

## Characteristics of the BC Publishing Industry

Working effectively across the value chain, survey respondents spoke to a collegial, collaborative, and supportive group that is under pressure from many forces. One survey respondent characterizes BC’s “publishers [as] ... inventive and ingenious, also deeply committed to their profession, taking risks and working incredibly hard.”

Despite headwinds, a combination of factors have strengthened the industry, with many integrated parts working together. Numerous survey respondents credited the support of regional funding bodies Creative BC and the BC Arts Council, the support of collective industry initiatives, and strong support from the reading public.

## Composition of the BC Book Publishing Industry

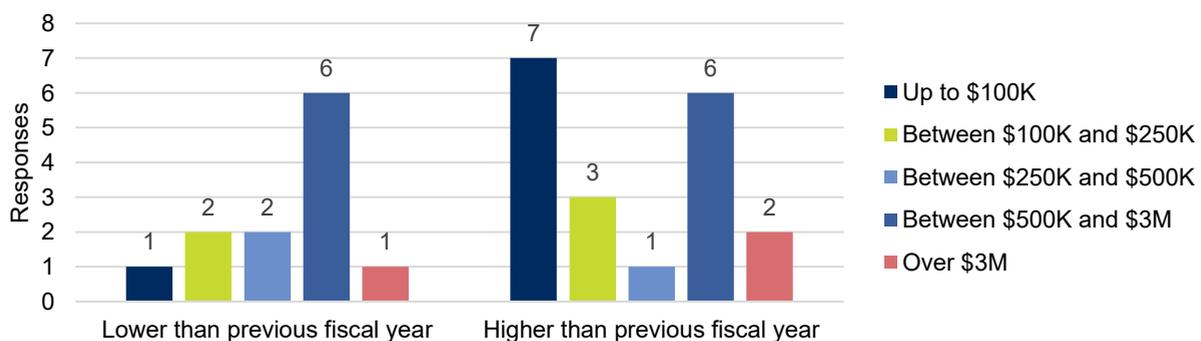
The 32 BC book publishers (representing 70% of the industry) who participated in the survey are grouped based on annual revenue:

Up to \$100K	8 publishers
Between \$100K and \$250K	5 publishers
Between \$250K and \$500K	3 publishers
Between \$500K and \$3M	12 publishers
Over \$3M	3 publishers
Prefer not to disclose	1 publisher

Comparing their most recent fiscal years, more companies had higher year over year revenue, with mixed results for the largest cohort, publishing companies that report between \$500K and \$3M annually.

### Publishers Reporting Higher vs. Lower Revenue Compared to Previous Fiscal Year

Source: BC Book Publisher Survey



## BC Book Publishers are Cultural Anchors in a Changing World

*“We publish many BC authors and illustrators, both established creators like David Suzuki and Julie Flett and new authors publishing their first book. Our publishing program is international in scope and through it, BC-authored books are promoted and sold into territories around the world. BC books are available in English in bookstores as far flung as Australia and the UK. We also pitch BC authored books to foreign publishers for translation, bringing additional exposure and revenue to the authors from our home province.”*

### BC’s Book Publishers Support BC Culture

As independent publishers, BC book publishers support, amplify, and preserve BC culture by working with BC-based authors and illustrators and on BC subject matter, often by BC authors, which is evident in publishers' qualitative survey responses and their company focus on genres. In the survey, both Indigenous and Local/Regional Interest stories are equally selected as the second most popular genres published by BC book publishers, following the most popular genre: history/biography/autobiography.

BC publishers’ commitment to Indigenous authors and subject matter is further reflected in survey respondents who were asked to describe characteristics of their company and their commitment to BC culture:

*“Our company is composed of both Indigenous and non-Indigenous individuals who are all deeply committed to Truth and Reconciliation efforts. We have a community-based approach that focuses on putting relationships first. Our authors have final approval over their work to ensure cultural authenticity and consent with how their story is told.”*



*“Sometimes up to 75% (in a year/season) of our authors are Indigenous. We support the creativity and voices of these BC artists.”*

At least 40% of active products <sup>6</sup> from BC publishers are authored by BC writers. Seventeen percent focus on BC as a subject and 70% of those products that are about BC are by BC authors. In total, BC publishers support 2,527 unique BC authors, with 8,409 active products.

### Active Products by BC Publishers, Representing 2,527 BC Authors

Source: BNC Data Extracted December 20, 2024 (Limited Metadata)



*“We have published many new and established BC authors, whose books represent various communities in the province including racialized and Indigenous; these authors include David Chariandy, Wayde Compton, Ivan Coyote, Lindsay Wong, Eve Lazarus, Daniel Francis, Aaron Chapman, Amber Dawn, Jillian Christmas, and jaye simpson.”*



*“In 2024, 12 of 18 new books published were by BC-based authors. 3 of these were first-time authors (never published before); 6 were recurring authors with multiple books published by [publisher name]; 3 were established authors who had worked with other publishers in the past and published with [publisher name] for the first time in 2024. This demonstrates our commitment to working with BC authors in all stages of their careers, to seek out and recruit new talent, nurture and develop authors over time, and work with experienced authors looking to diversify their publishing experience.”*



*“[We publish] many BC authors and illustrators. Our books have won the BC Book Prize twice and have been short-listed many times for the BC Book Prize. Many of our novels, chapter books and picture books are set in British Columbia. Since 2010 we have published 85 books—of these 47 were written and/or illustrated by British Columbians, and many were set in BC...Our books [have] been published around the world in Portugal, China, Taiwan, Korea, Brazil, South Africa, India, Jamaica, Mexico, Germany and have been chosen by the International Youth Library for their White Ravens selection. Our books are in libraries everywhere in the US and the UK.”*

<sup>6</sup> Active product sales data from BNC and metadata containing BC and its variations are not mandatory fields, therefore these results are very likely under-reported. See more details in the Appendix.

## BC Books for BC Readers

Many survey respondents wrote about their positive impact on BC authors and illustrators, whether through their curatorial choices of whose works to publish or their role in career building and financial support.

BC publishers are united by a deep commitment to championing local voices emphasizing Canadian and BC-based voices, including Indigenous and underrepresented communities. Survey responses detail investment in first-time and emerging authors, bringing them into a thriving literary community that opens doors to grants, awards, media attention, bigger publishing opportunities, and wider market reach. One publisher noted their commitment to reprinting backlist titles which ensures that authors' works continue to reach readers, providing lasting visibility and ongoing royalty opportunities.

This commitment to BC authors extends powerfully to BC's cultural and retail ecosystem. Publishers collaborate closely with local retailers, libraries, and teachers—offering meaningful discount structures, locally relevant titles, and programming such as author events and workshops that pull readers into bookstores, libraries, alternate retailers, and community spaces. Publishers do more than place books into the market, they are telling the stories of British Columbia: from Indigenous voices to environmental themes, from local history to fiction and many genres beyond. Their broad distribution networks reach from urban centres to rural communities, ensuring that BC stories are available not just on bookstore shelves but in visitor centres, specialty shops, and libraries across the province. Together, these efforts sustain a dynamic, resilient literary culture that speaks directly to BC readers and strengthens the local book ecosystem.

BC publishers are proving that local stories have both deep roots and wide reach. Readers in BC crave books that reflect their lives, landscapes, and communities — whether they're seeing themselves on a Read Local BC display or flipping through a guidebook packed with hiking tips, family advice, and reminders to care for the land. BC publishers deliver on this hunger for local stories and bring international voices and perspectives into the mix.

The success stories speak for themselves. Marion McKinnon Crook's memoirs of life as a public health nurse in the Cariboo-Chilcotin have become BC bestsellers, building a loyal following among nurses and readers eager to see their own histories told. Julie Flett's children's books shine a light on Indigenous culture, earning global acclaim and the prestigious New York Times Best Illustrated Award. And Iona Whishaw's Lane Winslow mystery series, set in a small BC hamlet, has grown into a Canada-wide success, beloved for weaving local and historical details into sharp, progressive plots — with over 200,000 copies sold and a TV option in the works.

## Audience and Market Reach

BC-based book publishers produce in a wide range of genres, meeting different markets and readers. Using the industry's classification system of BISAC codes, the distribution of publications by genre indicates flexibility and range, showing that BC book publishers offer a variety of products

fit for market. Most of the 42 BC-based publishers in the BNC dataset bring 12-24 new active titles to the market each year, with UBC Press and Orca Books far exceeding that average.

## Funding and Policy Environment

Federal funding for the Canadian book industry totals \$36.7M per year and is distributed to the Canada Book Fund, administered by the Department of Canadian Heritage. Within that suite of funding programs is Support for Publishers which contributes to publishing Canadian-authored books.

While the federal Canada Book Fund does not publicly disclose annual distribution of funds in an easily accessible format, a 2024 letter from the Association of Canadian Book Publishers, noting a one-time \$10 million increase to the Canada Book Fund in Budget 2024, remarks that the base budget for the Canada Book Fund had remained unchanged for over two decades, decreasing the effective value by over 55%, due to inflation.<sup>7</sup>

For BC-based publishers, the BC Book Publishing Tax Credit provides a tax credit of up to 90% of the base amount of their Canada Book Fund contribution. So long as the tax credit rate remains at 90%, the design of the program means the amount of support available is essentially pegged to the size of the Canada Book Fund.

Additional funding supports for BC book publishers include Operating Assistance from the BC Arts Council, who have consistently provided a total of between \$650,000 and \$700,000 to qualifying publishers annually. Amounts to individual publishers have remained largely static for at least the past six fiscal years ending in FY 2023-24.<sup>8</sup>

Canadian publishers have accessed Department of Canadian Heritage funds through the National Translation Program for Book Publications to translate literary fiction. They have also benefited from the Emergency Support Fund during the COVID period and Support for Distribution, the latter of which was a temporary fund to keep the book distribution system operable. Other initiatives were for support for booksellers and accessible digital books.

Federal policy supports also include tax incentives (such as GST exemptions for educational materials) and copyright protection through the Copyright Board of Canada.

---

<sup>7</sup> Association of Canadian Book Publishers, [News post](#): April 2024. Details about grants from the Canada Book Fund are searchable on a [Grants and Contributions](#) data viewer on the Government of Canada website. Details about all grants and contributions are available in downloadable spreadsheet format from the [Proactive Disclosure - Grants and Contributions](#) webpage. Analysis by the B.C. Ministry of Tourism, Arts, Culture and Sport of this data accessed in April 2025 found that BC received \$4.2 million in overall CBF funding in fiscal year 2024/25. Details about funding from the BC Book Publishing Tax Credit are available at [Budget and Fiscal Plan 2025/26 - 2027/28](#) (p.126); amounts are rounded to the nearest million: \$2 million in 2023/24 (actual), \$3 million in 2024/25 (estimated), and \$3 million in 2025/26 (planned).

<sup>8</sup> [Arts BC Council recipients](#), extracted May 2025

With concerns about the efficacy of the Copyright Board, there is ongoing advocacy from each book publishers' provincial association and the Association of Canadian Publishers (ACP) to amend the Copyright Act at the federal level. Recently, the ACP made the following statement:

*"After more than a decade of market damage stemming from changes to the Copyright Act in 2012, resulting in more than \$200M in lost licensing revenues, ACP was encouraged by the Government's 2022 budget commitment to ensure that the Copyright Act promotes fair remuneration of creators and rightsholders for use of copyright-protected material, and that the educational publishing industry is sustainable. With no signs of legislative reform on the horizon, Canadian publishers fear that this is yet another promise that will go unfulfilled."*<sup>9</sup>

---

<sup>9</sup> Association of Canadian Publishers: "Budget 2023: Government commitments to invest in Canadian book publishing fall short." April 2023. <https://publishers.ca/budget-2023/>

# Challenges Facing BC Book Publishers

Survey respondents ranked their top three major challenges facing the industry: the cost of doing business (29%), followed by supply chain concerns (20%) and declining sales revenue (16%).



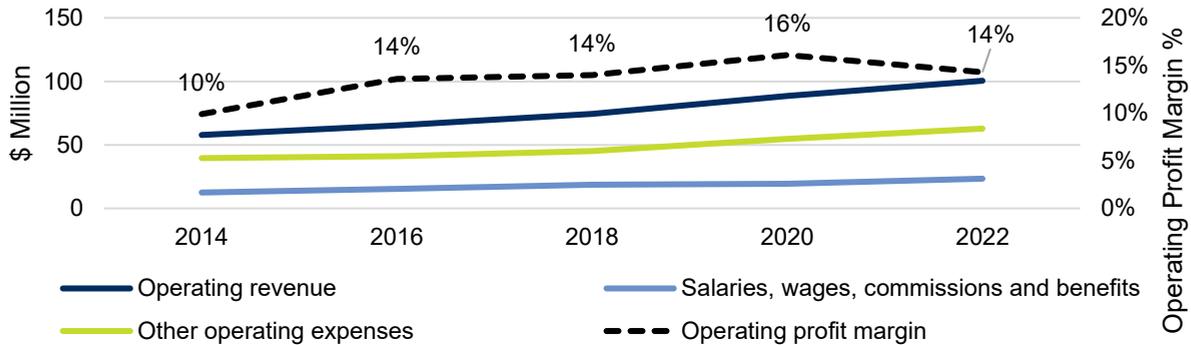
## Cost Pressure

BC book publishers cite the cost of doing business as their number one concern with rising ongoing supply chain issues that are compounded by global trade volatility.

Additionally, 2022 results from the biannual survey of book publishers by Statistics Canada show operating profit margins among BC publishers under pressure. Cost pressure is primarily from other operating expenses. From 2018 to 2022, salaries, wages, commissions, and benefits increased 25% compared to 39% for other operating expenses. Cost of goods sold, which includes printing costs and ever-increasing paper costs, typically accounts for the largest share of other operating expenses for book publishers.

### BC Book Publishers Summary Financial Statistics

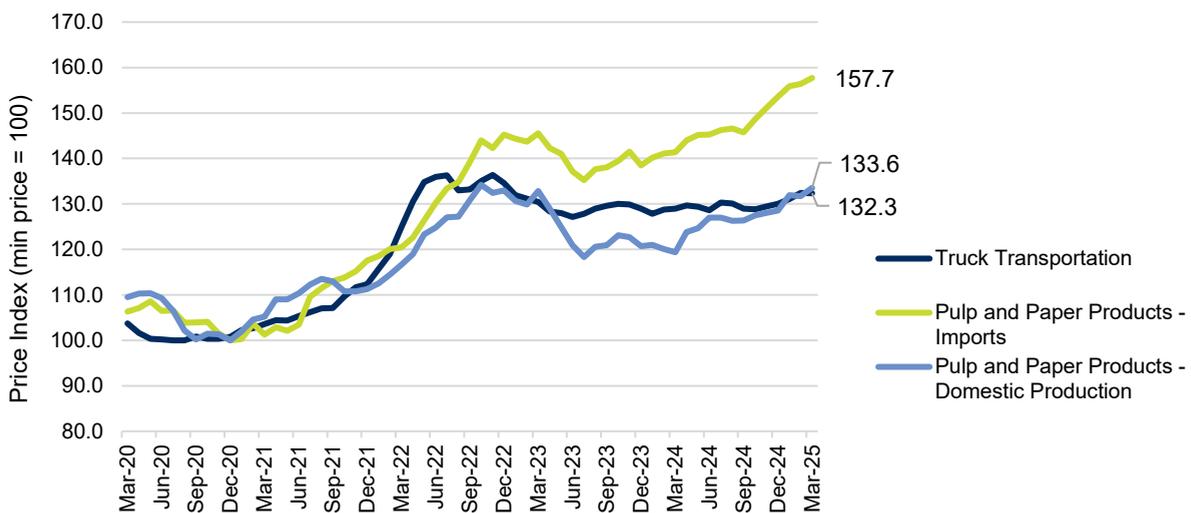
Source: Statistics Canada. Table 21-10-0200-01 Book Publishers, Summary Statistics, Deetken Analysis



Price index data from Statistics Canada show price escalations of pulp and paper products both produced domestically in Canada and imported into Canada as well as cost increases for truck transportation. These are three important inputs to the production and distribution of printed books. All three saw their lowest price in late December 2020 (lowest prices in the period are assigned a value of 100 in the chart below) and their highest price in either February 2025 (domestically produced pulp and paper) or March 2025 (imported pulp and paper, truck transportation). For instance, the price of imported pulp and paper was 57.7% higher in March 2025 than in December 2020.

### Price Indices for Select Products and Services, Mar 2000 - Mar 2025

Sources: 1) Statistics Canada. Table 18-10-0281-01 For-hire Motor Carrier Freight Services Price Index, Monthly; 2) Statistics Canada. Table 18-10-0265-01 Industrial Product Price Index.

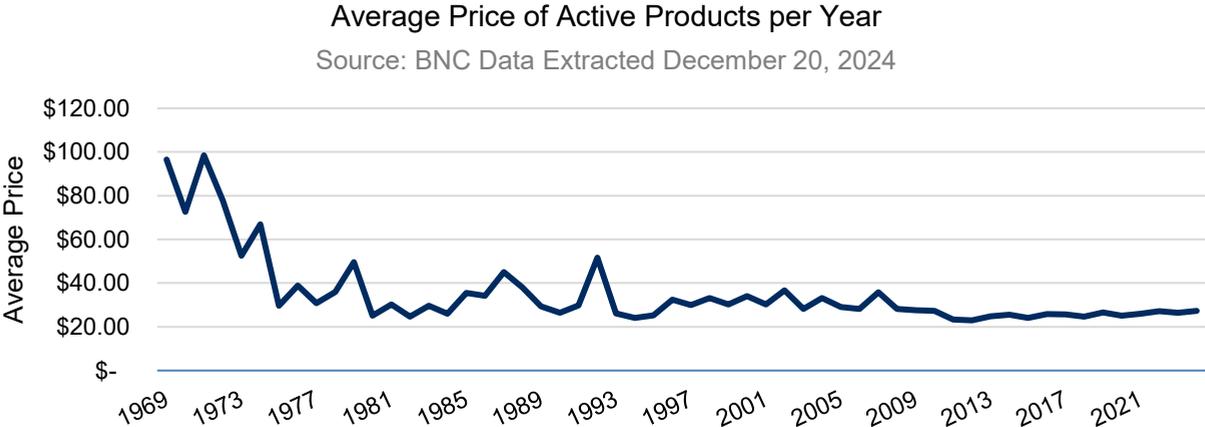


# Pricing Limitations

Industry-wide, the retail pricing of printed books has remained flat for many years with independent and multinational publishers reluctant to increase their list prices due to several reasons: customers have a fixed price mindset, meaning that they anchor the “value/worth” of the printed book to the manufacturer’s suggested retail prices on the printed book’s cover, which retailers can subsequently discount. Survey respondents also spoke of resistance from dominant retailers on price increases.

Multinational publishers benefit from greater economies of scale, allowing them to promote and sell books at a lower price, which puts smaller sized publishers in BC at a disadvantage. Market leaders Amazon and Indigo set terms, particularly retail pricing, which has prompted BC book publishers to diversify their sales channels, reducing overreliance on dominant retailers.

As the BNC data illustrates, the price of a book sold by BC publishers (despite inflationary pressures) has remained mostly static for over sixteen years.



# Funding Concerns

Notably, uncertainty about public funding and tax credits was just behind declining sales revenue as a top challenge. Publishers who receive arts council funding spoke to their dependency on those mostly static funding sources, while smaller publishing houses are also facing succession challenges.

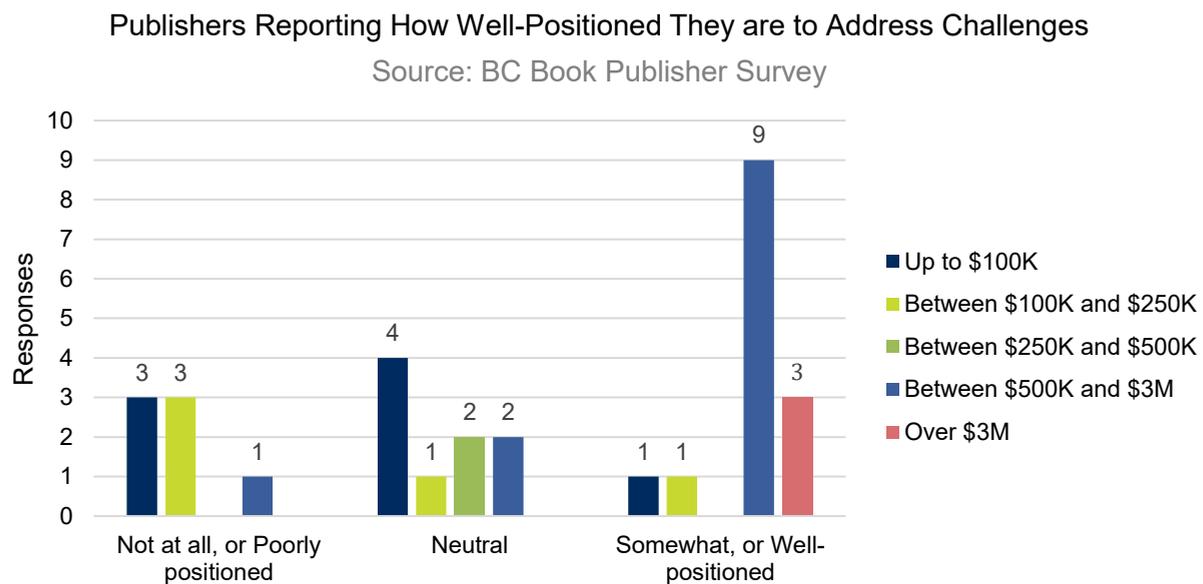
# Artificial Intelligence

Artificial intelligence is seen as both a threat in its potential to generate low-quality titles that flood the market but also a tool with benefits that could reduce costs for audio narration, assess foreign language manuscripts, and increase operational efficiency on marketing and editorial tasks.

# Ability to Meet Challenges and Opportunities for Growth

*“As a publisher with seven full-time staff and annual revenue of \$1.5 million, we have proven to be resilient and able to pivot quickly in the face of challenges such as rising production costs, the loss of traditional book media, and the dominance of Amazon and Indigo. We have also increased special sales, academic adoptions, and language rights sales to offset declines in traditional book sales.”*

Reflective of the entrepreneurial spirit of BC’s book publishers, more survey respondents reported that their company was **somewhat** or **well-positioned** than respondents that reported their company was poorly or not at all positioned to address these challenges.



By the five annual revenue ranges, the company’s ability to meet challenges differs, with the largest companies reporting they are somewhat or well-positioned to meet those challenges. Those businesses with higher revenues tended to be more optimistic about being well-positioned to address both challenges and opportunities, whereas small publishers have fewer resources to transform their businesses.

*“To be completely honest, I'm not entirely sure what the future holds for us. ... [Many] factors make it difficult to predict how publishers like us will fare in the coming years. That said, I remain hopeful. We've faced challenges in the past and have risen to meet them with determination and creativity. I believe we'll continue to do what we do best: publishing high-quality books that resonate with readers and reflect our values. However, I don't envision significant growth for us under these circumstances. If I'm being optimistic, I see us maintaining our current size and focus, navigating this uncertainty while staying true to our mandate.”*

## **Adapting to Cost Pressures and Finding Efficiencies**

Individually, publishers are reducing operating costs by finding efficiencies and partnering with peers for shared solutions such as co-printing, shared warehousing, and collaborative distribution. Efficiency tactics shared by survey respondents include:

*“Consolidating shipping: not only among our own list, but within our group of publishers as well ... to save on import and processing fees per shipment. We have begun decreasing print runs, intentionally printing stock for a limited number of seasons with an aim to reprint as necessary in order to save on warehousing and storage fees. We have implemented e-commerce to our website and have begun diverting advertising and marketing fees to our website in order to keep a larger portion of each sale in house.”*



*“Ending the practice of “returns” within the industry is also a critical opportunity. Returns create significant financial pressure and inefficiencies for publishers and retailers alike. Implementing non-returnable sales models or more flexible distribution strategies would help reduce waste and improve profit margins for both parties. This could foster more sustainable practices across the entire supply chain, allowing publishers to focus on the long-term health of their businesses.”*

Others spoke of reducing the costs of selling: for example, reconsidering the role of the sales representative and reducing the volume of advance copies for publicity and marketing.

## Growth in Book Exports

Statistics Canada data on exports of books (from all producing industries) into the international marketplace show strong growth between 2015 and 2022.



## Opportunities for Growth: New Markets and Local Markets

*“Ebooks and audiobooks represent a growing market and should continue to be a key focus for publishers. As digital platforms expand, these formats provide readers with more flexibility, allowing them to consume books on various devices at their convenience. Publishers can enhance this offering with subscription services and digital bundles, increasing accessibility and long-term engagement. These formats also support global reach, especially when paired with translation and localization strategies to attract international readers.”*

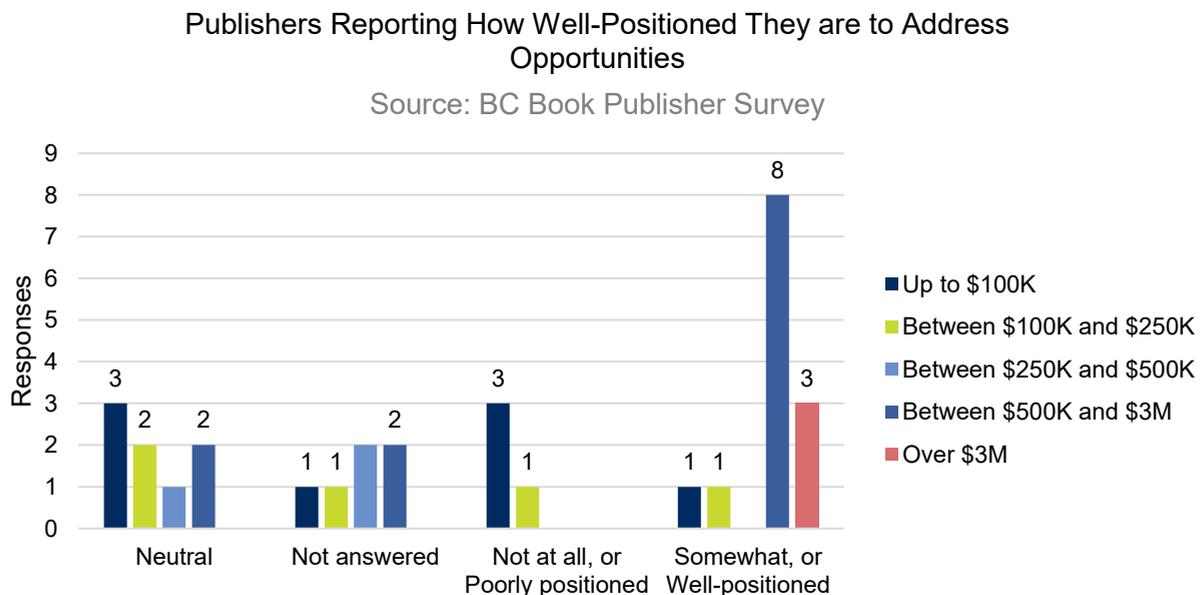
BC book publishers are testing and perfecting a mix of strategies that expand their market while continuing to build on their commitment to serve **local markets** with relevant content. Many publishers are pursuing an **outward focus** of developing new markets through geography, language rights sales, new formats, new genres, and co-publishing arrangements. While pursuing those markets, they are sharpening their strategies for alternate direct to consumer retail (non-traditional retail) and increasing digital marketing to support global distribution. The table below demonstrates BC book publishers’ strategic actions along the value chain.

Value Chain Innovation	Outward Focus (Developing New Markets)	Serving both Global and Local: Innovation	Inward Focus on Local Markets
<b>Content Creation</b>	<p>New genres or age categories</p> <p><i>“Developing a more robust foreign rights strategy”</i></p> <p><i>“Intensified our efforts on rights and permissions”</i></p>	<p>Super serving a niche audience</p> <p><i>“Continue our work as an activist, solutions-oriented publisher focused on bringing you tools for a world of change”</i></p>	<p>Hyperlocal content and themes</p> <p><i>“Focus on non-fiction genres such as outdoor adventure, natural history, and travel/guidebooks”</i></p>
<b>Editorial &amp; Production</b>	<p><i>“Published a popular series of Canadian crossword titles”</i></p>		<p>Local/regional titles are in demand: BookManager generates 216 products under Regional BC</p>
<b>Marketing &amp; Publicity</b>	<p>Cross-industry partnerships</p> <p><i>“Share marketing, distribution and administrative costs with [other BC publishers], including efficient self-distribution from a warehouse in the remote community of Pender Harbour”</i></p> <p>New approaches to marketing</p> <p><i>“Working closely with marketing staff and publicists to develop publicity strategies that are not reliant on traditional media”</i></p>	<p>Collaborations with local orgs that open access to new audiences</p> <p><i>“Built a reading app to sell content to schools”</i></p> <p>Local-first strategies that can scale</p> <p><i>“Using a digital printer who can print smaller quantities quickly to help us with storage costs”</i></p>	<p>Local author promotion and regional distribution partnerships</p> <p><i>“Provide greater discount structures or greater investment in collaboration with BC-based retailers and libraries”</i></p> <p><i>“Work with booksellers on collaborative events and campaigns including launches, readings, and signings”</i></p>
<b>Distribution &amp; Retail</b>	<p>New formats (audiobooks, apps, merchandise)</p> <p><i>“Access to the European market through books on demand without representation”</i></p>	<p>Niche markets rooted in place (e.g., Indigenous stories, regional history)</p> <p><i>“Supply not only traditional bookstores but also specialty retailers and non-traditional outlets”</i></p>	<p>Localized distribution</p> <p><i>“We place our books across BC”</i></p>
<b>Sales &amp; Revenue Generation</b>	<p>New geographic markets</p> <p><i>“Signed on with a new US distributor”</i></p> <p><i>“Send a rep to the Frankfurt Book Fair”</i></p> <p>Rights sales and licensing</p> <p><i>“Export more widely (1/3 of [publisher] sales are export sales to the US, ...and opening up sales to worldwide distribution)”</i></p> <p><i>“Increasing our rights sales to foreign markets”</i></p>	<p>Direct-to-consumer models</p> <p><i>“Shift toward direct-to-consumer sales to bypass traditional distribution channels, for greater control over pricing, customer relationships, and marketing”</i></p> <p><i>“Build direct connections with readers, personalize offerings, and develop stronger brand loyalty”</i></p>	

## BC Book Publishers are Ready to Meet Opportunities

*“The book publishing industry is at a crossroads, and by embracing direct-to-consumer models, rethinking traditional sales structures, and eliminating outdated practices like returns, publishers can position themselves for a more innovative and profitable future. These opportunities not only promise financial benefits but also contribute to a more sustainable and dynamic publishing landscape in the years ahead.”*

Most survey respondents – particularly those businesses in the highest annual revenue band – felt that they are **somewhat** or **well-positioned** to be able to meet the opportunities over the next ten years. However, there is much at stake, with survey respondents both expressing concerns and uncertainty, while others had a strong vision for the future of BC book publishers.



Despite pressure from all sides, some publishers are clear-eyed in facing challenges. Respondents articulated their plans with firm, progressive goals. Numerous survey respondents pointed to expanding digital formats, forming partnerships with distributors and digital platforms (including social media), while strengthening ties with BC’s bookstores, libraries, and cultural groups keep their community roots strong.

# The Way Forward: Next Steps for a Stronger Industry

BC's book publishers are well-established and resilient businesses with many ready to face the challenges and opportunities ahead with some key supports needed to leverage their capacity for innovation:

## Local Focus Builds Global Readiness

Serving hyperlocal or regional audiences – whether mainstream or niche – develops capacity to sell to committed audiences around the world.

## Digital Markets Unlock Scale

Selling into the global digital platforms allows BC publishers to reach niche audiences outside traditional media and establishes direct to consumer capacity.

## Global Opportunity

Rising international exports show that mechanisms such as travel grants, translation rights agency and foreign translation grants are effective tools for opening up international markets.

*“With continued government support, strategic innovation, and a focus on community engagement, the industry will be well-positioned for growth in the next 5-10 years.”*

## Conclusion

Publishers do more than place books into the market. They tell the stories of British Columbia: from Indigenous voices to environmental themes, from local history to fiction, and many genres beyond. Their broad distribution networks reach from urban centres to rural communities, ensuring that BC stories are available not just on bookstore shelves but in visitor centres, specialty shops, and libraries across the province. Together, these efforts sustain a dynamic, resilient literary culture that speaks directly to BC readers and strengthens the local book ecosystem.

Alongside this innovation from entrepreneurial publishers of all sizes, government support will remain essential to leverage the mix of creativity, market opportunity, partnerships, and smart policy support for a thriving BC publishing industry, ensuring that smaller publishers in the ecosystem thrive alongside their larger peers. Continued investment will ensure the retention of BC publishing jobs, local BC stories, and Indigenous voices available throughout the province and continued growth in exports.

# Appendix

## BookNet Canada Data

BNC data tracks physical and digital format sales with total units sold in Canada per year. BNC tracks 46 BC-based book publishers and the graphs in this report represent 42 BC-based book publishers whose sales are captured through BNC. The 46 publishers that BNC tracks are:

1. Anvil Press
2. Arsenal Pulp Press
3. Caitlin Press Inc.
4. Common Deer Press
5. Crwth Press
6. Douglas & McIntyre
7. Engage Books
8. Figure 1 Publishing
9. Granville Island Publishing
10. Greystone Books
11. Hancock House Publishers
12. Harbour Publishing Co. Ltd.
13. Heritage House
14. ITMB Publishing LTD.
15. J.Charlton Publishing Ltd.
16. Majik Kids
17. McKellar & Martin Publishing Group
18. Medicine Wheel Publishing
19. Midtown Press
20. Mother Tongue Publishing
21. Namaste Publishing
22. New Society Publishers
23. New Star Books
24. Nightwood Editions Ltd.
25. Nine Ten Publications
26. Now or Never Publishing
27. Orca Book Publishers
28. Page Two Books
29. Polestar Calendars Ltd. (PCL)
30. Rainbow Publishers/Raven Chapbooks
31. Rocky Mountain Books
32. Ronsdale Press
33. Self-Counsel Press
34. Simply Read Books Inc.
35. Sono Nis Press
36. Stonehewer Books
37. Strong Nations Publishing Inc
38. Talonbooks
39. Theytus Books
40. Thornapple Press
41. Tidewater Press
42. TouchWood Editions
43. Tradewind Books
44. UBC Press
45. Whitecap Books Ltd.
46. Wood Lake Publishing Inc.

## About the Metadata in BNC

BNC metadata on authors and subject matter is primarily used for discovery, whether by readers or retailers (online or physical). While funding programs accessed by Canadian publishers do need to demonstrate their support of Canadian authors, the same does not hold true for publishers

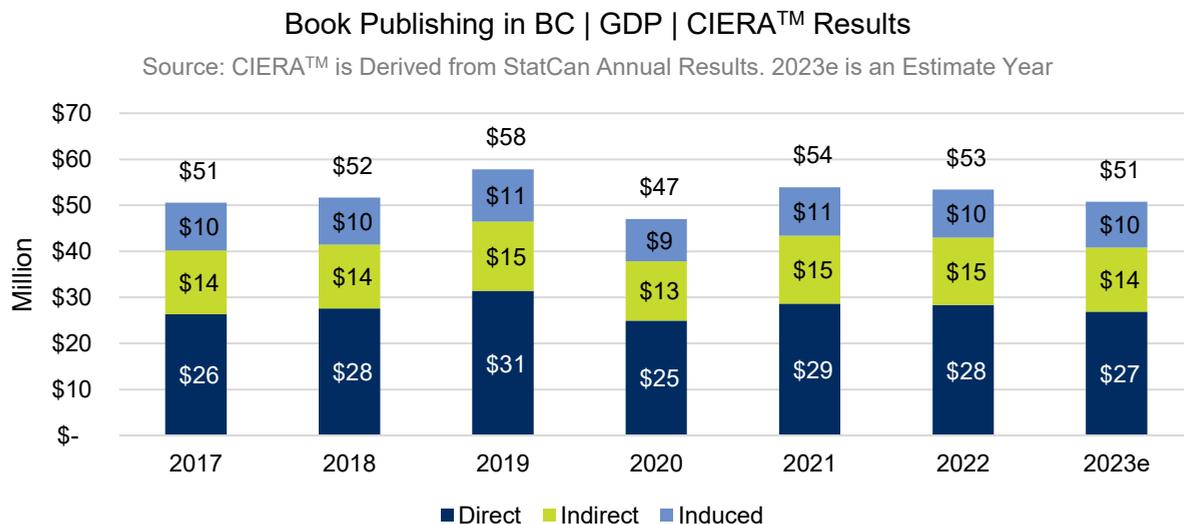
accessing provincial funding. Therefore, the frequency of BC authors were determined through BNC biographical data, where such data exists. Authors are counted as unique (only counted once). Instances of “About BC” were based on metadata that included BC (and variants such as British Columbia, B.C.) in the description, title, subtitle, and keywords. The following are for products in the BNC data extracted on December 20, 2024 with an availability status of “Active”.

- Of products:
  - 82% of products are by Canadian authors (including 701 products where the author is identified as from BC but Canadian=No)
  - 35% of products are by BC authors
  - 47% of products are by other Canadian authors
  - 18% of products are by non-Canadian authors
  
- Of authors:
  - 77% of authors are Canadian (including the 229 authors where the author is identified as from BC but Canadian=No)
  - 34% of authors are BC authors
  - 43% of authors are other Canadian
  - 23% of authors are not Canadian
  
- Of products about BC:
  - 94% of products are by Canadian authors (including the 232 products where the author is identified as from BC but Canadian=No)
  - 70% of products are by BC authors
  - 24% of products are by other Canadian authors
  - 6% of products are by non-Canadian authors

## Core Economic Indicators

CIERA™ is Creative BC’s proprietary economic measurement tool for the creative industries. Results are derived from Statistics Canada and delivered annually. Learn more at <https://creativebc.com/sector/research-reports/ciera/>

CIERA™ results on BC’s book publishing industry indicates steady growth in GDP with some recent declines. Note that CIERA™ results exclude government support.

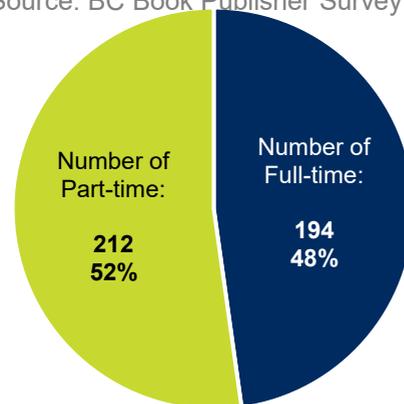


## Jobs/Employment

CIERA reports that the books industry employs between 500-600 individuals. Across the 32 BC book publishers surveyed, slightly more than 50% of the workforce are employees and the balance are contractors. Unsurprisingly, the publishers with higher annual revenue employ more individuals than their counterparts.

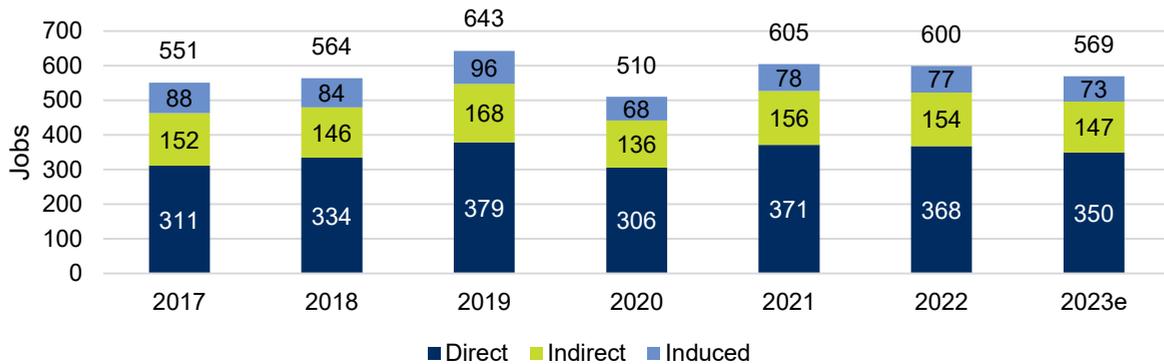
Total Employed Including Employees and Contractors (n=32)

Source: BC Book Publisher Survey



## Book Publishing in BC | Jobs | CIERA™ Results

Source: CIERA™ is Derived from StatCan Annual Results. 2023e is an Estimate Year



## Survey Overview

Books BC distributed a survey to 46 BC book publishers from November 2024 to January 2025 with 32 companies providing responses. The survey text follows.

Books BC is conducting an industry research study in partnership with Deetken Insight. The purpose of this study is to build a data-supported case for ongoing funding support, tell the story and demonstrate the value of our regional book publishing industry, and inform long-term business innovation.

Goals of the survey:

1. To collect current information on the state of the industry and create a cohesive profile of BC's publishing industry;
2. To demonstrate the socio-cultural impact of BC publishers that goes beyond GDP indicators as currently measured;
3. To seek insights into industry challenges and opportunities, supporting our advocacy efforts.

Data will be collected and compiled by Deetken Insight, and the identity of individual publishers will remain confidential.

If you have any questions about the study, please contact [matea@books.bc.ca](mailto:matea@books.bc.ca). Thank you for your participation and we look forward to sharing the results with you Spring 2025.

## Survey Descriptive Questions

### Descriptive Details

1. What is the name of your company? (Mandatory) Text box
2. What year was your publishing company established? (Mandatory) Text box
3. What genres of books does your company publish? (Mandatory) Multiple selection
  - a. Fiction
  - b. Kids/Young Adult
  - c. History/Biography/Autobiography
  - d. Cooking/Gardening/Lifestyle
  - e. Poetry/Drama
  - f. Art/Photography
  - g. Science/Social Science/Technology
  - h. Local/Regional Interest
  - i. Indigenous
  - j. Sports/Recreation/Health
  - k. Travel/Guidebooks

Please note that questions marked with an asterisk (\*) are mandatory and must be completed before proceeding to the next page.

### Business Details

Your responses will be kept confidential and shared only in aggregate form to protect your anonymity.

4. What is your total revenue for the fiscal year ending in 2023? (Mandatory) Single Selection
  - a. Up to \$50k
  - b. Between \$50k and \$100K
  - c. Between \$100K and \$250K
  - d. Between \$250K and \$500K
  - e. Between \$500K and \$3M
  - f. Over \$3M
  - g. Prefer not to disclose
5. Is your revenue for the fiscal year ending in 2023 higher or lower than in the previous fiscal year? (Mandatory) Single Selection
  - a. Higher than previous fiscal year
  - b. Lower than previous fiscal year

6. On average throughout the year, how many people do you employ, either as employees or contractors? (Mandatory)
  - a. Full-time Text box (try integer)
  - b. Part-time Text box (try integer)

## Qualitative Questions

### Impacts

**For open text responses:** to the best of your ability, please provide detailed answers, using concrete examples. Answers in **short-hand form** (e.g., list format) are welcome to a **maximum of 500 words**.

1. How do the books you publish have a positive impact on the following within British Columbia? (Optional)
  - a. BC authors *Text box*
  - b. BC retailers and libraries *Text box*
  - c. BC readers Text box
2. What are anecdotes or examples of these impacts? (Optional) *Text box*  
*For example, is there an author who has a specific local success story? Or a bookseller, librarian, or reader that has provided direct feedback on how your books have impacted them?*
3. Please describe the crucial characteristics that enable these impacts (Optional) *Text box*  
*For example, product mix, approach to acquisitions, business structure/identity, marketing approach, cultural connection, etc.*
  - a. Characteristics of your company
  - b. Characteristics of the BC publishing industry

### Challenges

**For open text responses:** to the best of your ability, please provide detailed answers, using concrete examples. Answers in **short-hand form** (e.g., list format) are welcome to a **maximum of 500 words**.

4. What are the major challenges facing the industry? Please select up to **three** options. (Mandatory) *Multiple selection – Top 3*
  - c. **Cost of doing business:** Rent, shipping fees, returns, increased marketing costs associated with growing US and foreign markets, increased salaries, maintaining websites, etc.
  - d. **Supply chain concerns:** Access to affordable domestic and foreign printers; efficient and affordable delivery of books to / from domestic and international distributors; etc.
  - e. Attracting and retaining author talent

- f. **Uncertainty around public funding/tax credit**, including decreases in grant allocations (flatlined, falling, or inaccessible funding)
  - g. Finding and retaining qualified staff, especially with a DEI lens
  - h. The threat/unknown of AI
  - i. Erosion of copyright law
  - j. Declining sales revenue
  - k. **Other** *Text box*
5. What has your company done that you consider to be innovative in the face of these challenges? (Optional) *Text box*
6. How well-positioned is your company to address these challenges (Optional) *Scale*
- a. Not at all
  - b. Poorly
  - c. Neutral
  - d. Somewhat
  - e. Well-positioned
7. What can be learned from book publishers outside of BC? Can you provide examples of how other book publishers have successfully addressed challenges? (Optional) *Text box*

## Opportunities

**For open text responses:** *to the best of your ability, please provide detailed answers, using concrete examples. Answers in **short-hand form** (e.g., list format) are welcome to a **maximum of 500 words**.*

8. What are the major opportunities facing the industry within the next 10 years? (Optional) *Text box*  
*For example, access to markets, technology and innovation, partnerships, and collaboration, etc.*
9. What has your company done that you consider to be innovative in light of these opportunities?
10. How well-positioned is your company to address these opportunities? (Optional) *Scale*
- a. Not at all
  - b. Poorly
  - c. Neutral
  - d. Somewhat
  - e. Well-positioned

## Outlook

**For open text responses:** *to the best of your ability, please provide detailed answers, using concrete examples. Answers in **short-hand form** (e.g., list format) are welcome to a **maximum of***

**500 words.**

11. What does the future look like for your company? Where do you see your company in 5-10 years? (Optional) [Text box](#)

12. What does success in the long run look like for the BC book publishing industry? (Optional) [Text box](#)

This concludes the survey. Please make sure you click the **Submit** button below to save your answers.

Thank you for your time – your participation is deeply appreciated!



### **Report Disclaimer**

Deetken Insight has relied upon the completeness, accuracy and fair presentation of all information and data obtained from a custom survey, custom datasets, and public sources, believed to be reliable. The accuracy and reliability of the findings and opinions expressed in the report are conditional upon the completeness, accuracy, and fair presentation of the information underlying them. As a result, we caution readers not to rely upon any findings or opinions expressed for business investment purposes and deny any liability to any party who relies upon them as such.

