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**READING IN
CANADA
1991**



Highlights



Communications
Canada

Canada

GRAVES, FRANK L.

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READING IN
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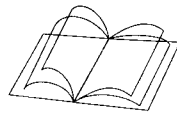
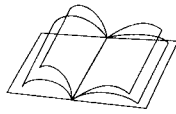


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1

INTRODUCTION

THE PLACE OF READING IN MODERN SOCIETY

Despite the predictions of various culture critics, reading is not a spent force in contemporary society. The burgeoning of mass electronic media has done little to dislodge the centrality of reading in modern civilization. Certainly television, video recorders and computers signal a profound shift in the way advanced societies produce and share culture. Yet, by any standard, the printed word is at the very heart of the new post industrial order. If anything, the development of electronic culture has only served to reinforce the importance of reading in modern society.

Universal education and the imperatives of the shifting techno-economic order have eliminated reading (and writing) as the exclusive tools and intellectual property of the *literati*. More so than at any other epoch in human history, reading is a pervasive feature of social, economic and cultural affairs.

In *social* terms, the printed word has largely replaced oral traditions, myth, ritual and folk knowledge as a key agent of socialization. Individuals learn the values and adaptive strategies of society from books and the educational system. One's eventual location in the social system is heavily influenced by this new form of cultural capital. Unlike the old class system based on private property, intellectual capital (e.g., degrees, professional and technical knowledge and basic cultural literacy) determines social class.

In *economic* terms, reading is increasingly a precondition for full participation in the new industrial order. As western economies emphasize services more and more, the ability to consume and work with the symbols contained in texts is dividing the work force into two classes — the symbolic analysts and the subordinate workers implementing the solutions/designs produced by the symbolic analyst (see R. Reich, 1991, *The Work of Nations: passim*). At the collective level, the literacy skills of a country are one of the crucial determinants of its competitive advantage (e.g., see Porter, 1990: *The Competitive Advantage of Nations*).

In the *cultural* realm of expressive symbols, the written word remains a crucial form of expression. Reading as a form of leisure, consciousness raising and sheer enjoyment is open to more individuals than ever before.

The contemplative and reflective elements of reading provide a crucial counter-balance to the brutal pace of the current secular order.

In this discussion, it will be useful to distinguish between *instrumental and expressive reading*. The former is reading with some other purpose in mind — typically related to the world of work and formal institutions. Expressive reading is reading for its own sake — as a form of expression and enjoyment. Culture is concerned with this latter realm.

Culture and national identity have always been an ongoing source of fascination and debate for Canadians. As we perch precariously on the precipice of yet another constitutional crisis, we are searching for some sorts of shared symbols and values to define the bases of the Canadian way of life. Canadian literary culture may have a special role to play in revealing the diversity and unity of the Canadian mosaic.

1.1 THE READING IN CANADA 1991 DATA BASE

Rationale for the Study

Reading in Canada 1991 was designed to gather up-to-date information on the reading behaviour and opinions of Canadians aged 14 and older. It provides a new benchmark readership survey in Canada. The research describes the current state of consumption and attitudes in today's market, as well as allowing trends analysis based on comparisons with the 1978 readership study.¹ While many of the measures in the current study were enhanced in scope and quality, a series of exactly repeated measures were also included to anchor the data to the 1978 survey. The *Reading in Canada 1991* survey focuses on book reading even more so than the 1978 readership study. The 1978 study was an invaluable source of market information for Canadian publishers who, unlike the magazine and newspaper publishing industries, have no national data to gauge the characteristics of the Canadian book reader and book buyer. The 1991 survey expands the information collected on book reading to enhance the survey's usefulness to the industry and government policy makers.

Survey Methodology

Data collection was based on a self-completed instrument design. Each respondent received a personalized questionnaire package. The content areas of the instrument included: general leisure time activities; reading patterns (including frequency, amount and type of reading material); barriers to reading; book purchasing; price elasticity; patterns of library use; reading habits of children; and opinion/values variables (e.g., trust in institutions, tolerance, views on Canadian culture).

¹ The 1978 *Survey of Leisure Time Activities — Reading Habits*, sponsored by the Department of the Secretary of State and the fieldwork conducted by Statistics Canada.

Out of the approximately 23,900 contacted by telephone, 12,400 Canadians agreed to receive a questionnaire through the mail. The original sample was drawn using a random selection process (random digit dialling). Each target respondent within a household was also selected using a random selection process ("last birthday" method). An additional 1,100 Canadians were mailed a questionnaire without a prior telephone contact.

The initial telephone contact was used to obtain mailing information, as well as to gain respondent cooperation, thereby enhancing response rates. In addition, telephone contacts served to collect several key data items for each member of the target sample. Age, education, self-rated reading ability, census division, rural/urban indicator, language of interview and gender information is available for the 12,400 Canadians in the original mailing. This prescreening procedure permitted sophisticated tracking of response bias about people who did not return the questionnaire.

To test whether differences in the statistics obtained from the 1978 and 1991 surveys could have been due to changes in the questionnaire, an additional 1,000 Canadians were sent an exact replica of the 1978 Statistics Canada questionnaire, with only the introduction letter and time references altered to reflect the current study.

Both questionnaires were produced in a booklet format, with a tri-colour introduction letter. Packages were sent in a Government of Canada envelope with the respondent's name and address applied by laserjet. As well as full instructions, which were included in the package, respondents were provided with a hotline number which was in operation throughout the survey period. This number was used primarily by individuals wishing to be sent a form in another language, although some respondents sought clarifications.

Two weeks after the initial mailing, a reminder card was sent to each member of the target sample. Three weeks after the reminder card, a full package was sent to each individual who had not yet responded at that time. The survey period was completed four weeks after the last mailing.

Response Rates and Contents of the Data Base

Response rates for each of the two surveys were excellent. The response rate for the 1991 Reading in Canada instrument was 60 per cent, resulting in about 7,000 completed cases. The replication of the 1978 Statistics Canada questionnaire, mailed out in 1991, had a slightly higher response rate (67 per cent) for a total of about 640 cases. We speculate that the higher response rate was incurred as a result of the shorter questionnaire form and the cartoon graphics used in the Statistics Canada version.

There is a source of concern about the characteristics of the approximately 11,500 households who either refused or were unable to participate in the survey. This group is typical of non-response for a phone-generated survey. It undoubtedly contains a higher incidence of non-readers and low level readers. Weighting to census parameters only partly removes this bias. In most surveys these individuals, who are at the margins of the dominant

society, are not represented. Our analysis leads us to believe that our sample *severely underrepresents the lowest decile of the Canadian population in terms of reading capacity*. In other words, the ten per cent of Canadians who have little or no reading skills are basically excluded from this study. The reader should keep this caveat in mind in interpreting study findings.

Overall, the questionnaires were completed well. The level of item non-response was extremely low. Minimal editing of the forms was required prior to entry of the data into the two data bases and only a handful of respondents expressed comments, questions or concerns on the forms.

The data base containing the 1991 instrument data consists of 246 variables, as compared to the data base for the 1978 form, which holds 189 variables. Each of these files have been merged with the original sample files containing approximately 12 variables obtained from the telephone contact and the geographic location of the respondent (e.g., census subdivision, community population).

Comparisons with the 1978 Survey

Reading in Canada has been designed to provide a controlled comparison of the state of reading in Canada in 1991 with a comparable survey conducted by Statistics Canada in 1978. The sampling plan, survey method and questionnaire format are all designed to enhance the ability to compare 1978 and 1991. Both studies used a self-administered survey and large random samples of the Canadian public. The 1991 survey asked some new questions but many of the questions were identical to 1978. A smaller subsample of 1,000 cases was given almost an exact (updated) copy of the 1978 survey form in order to assess the impact of the different questionnaires. For common questions the effects associated with the two different questionnaires were minimal.

The 1978 Statistics Canada sample was larger ($n \approx 17,000$) than the 1991 sample ($n \approx 7,000$). Non-response was higher in 1991 but both samples were weighted to the relevant Census parameters. The 1978 survey was dropped off in-person by a Statistics Canada interviewer, the 1991 form was mailed to the household after an initial telephone contact. Although there are some methodological biases resulting from these differences, analysis shows these errors to be modest. In short, the most likely explanation for differences between 1978 and 1991 is that these differences reflect "true" changes in the Canadian public.

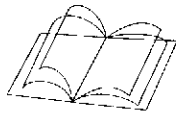
There is probably a lower representation of those less interested in and capable of reading in the 1991 sample. Later analysis will attempt to more precisely estimate the extent and influence of those forms of sample self-selection bias. In our view it is a partial factor in explaining some difference between 1978 and 1991.

This "longitudinal" study dimension greatly increases our ability to understand the place of reading in Canadian society. By fixing our current perspective against an earlier benchmark the whole problem of reading comes into much sharper focus.

1.2 ORGANIZATION

This preliminary highlights report is intended to provide an introduction to some of the major findings of Reading in Canada. It is the first public report to result from this project.

Related to the Reading in Canada project, there is a much broader research agenda on reading and book purchasing currently in place. Department of Communications is sponsoring further technical, market and policy research designed to deal with issues germane to the Canadian book publishing industry. The results of these more detailed analyses will be forthcoming in a more comprehensive report.



2

THE CURRENT STATUS OF READING IN CANADA

Experts, politicians and educators concur that reading is a vital skill in contemporary society. In fact, there is a general consensus that a society's ability and interest in reading is an important measure of that society's overall health. Many observers feel that judged against this standard Canada is not at all well. Quite recently, there have been numerous reports in the popular media, bemoaning our lack of interest and ability in the realm of written culture.

Does the evidence from the Reading in Canada survey support this conventional wisdom? A few behavioural and attitudinal indicators are presented here to compare observed reality against this prevailing shared belief. Many will find the results both surprising and provocative.

2.1 AMOUNT AND DISTRIBUTION OF READING

As a first step, consider the sheer amount of reading Canadians claim to engage in. Remember that survey data express people's stated behaviour. Because of both errors in recall and the tendency to present ourselves in a favourable light, verbal reports are an imperfect indicator of actual reading. Reading is a "socially desirable" behaviour and consequently will be somewhat exaggerated. Although less offensive than cruelty to animals or cigarette smoking, television viewing is generally seen as less desirable behaviour and consequently will be somewhat underreported. Furthermore, sampling biases will have eliminated many of those least interested and/or capable of reading. Despite these caveats, the ensuing data provide a useful portrait of the current status of reading in Canada.

Estimates of total reading activity can be requested from the respondent in several different ways (e.g., frequency or amount of time). Similarly, the reporting period can vary from the past week to the past year. There are certain methodological reasons for asking questions about any leisure activities in these different ways. In any case, all of the different measures produce a consistent result. *The vast majority of Canadians read for pleasure.*

Moreover, they read quite frequently and devote a very substantial chunk of their discretionary time to reading.

A simple indicator of reading activity can be derived from asking respondents how many hours they spent on reading in the past week (drawn from a longer list of other leisure activities). The question also provides information on whether or not individuals engaged in a given leisure activity (such as reading) in the past 12 months. This simple format is easy to interpret, provides a framework for situating reading in broader leisure activities and also is directly comparable to the benchmark 1978 Statistics Canada survey of reading and leisure activity.

Exhibit 2.1.A gives a basic distribution of the sample across various categories of pleasure reading in the past week. The figures are quite remarkable and contrast sharply with the current conventional wisdom that many Canadians are either incapable or uninterested in reading for pleasure. Even after discounting sampling bias and measurement error, it is readily apparent that the vast majority of Canadians read for pleasure. On average, Canadians claimed to have read (for pleasure) about seven hours in the past week. Only six per cent read nothing in the past week and this figure drops to a tiny 1.5 per cent when asked if they read for pleasure in the past year. The caveats in the introduction regarding the estimates of time spent reading apply throughout this text. These statistics are positively biased estimates. Even considering all possible survey biases (it is most likely that) over 90 per cent of Canadians read for pleasure — many of them with considerable appetite. This is *approximately the direct opposite* of Member of Parliament Chuck Cook's recent well publicized estimate.² Over half of the sample claimed to have read more than five hours in the past week and over one in six said they read for over 11 hours in the past week.

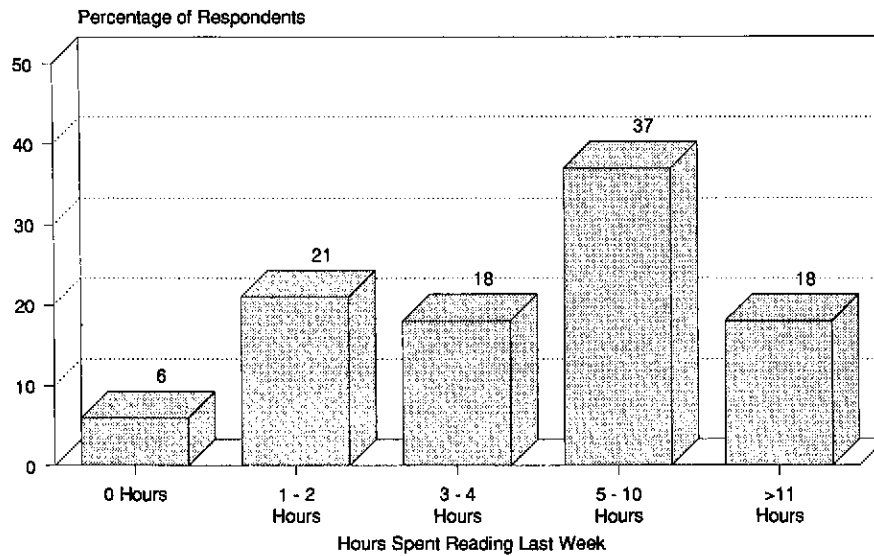
It is quite startling to note Canadians' apparent zest for pleasure reading — particularly in light of the collective angst about the sorry state of reading in our putatively post-literate society. But perhaps we are all merely looking at the comics, the back of our cornflakes boxes, or TV guide listings. The study also provides evidence of what sorts of material Canadians say they are reading.

As Exhibit 2.1.B clearly indicates, Canadians are not merely reading the funny papers. In fact, the largest amount of leisure time, 4.4 hours in the past week, is devoted to book reading. Newspapers and magazines occupy 3.6 and 2.1 hours of weekly leisure time respectively. This totals to around ten hours³ a week for pleasure reading (plus nearly three more hours of "non-leisure" reading). Naturally these average figures vary dramatically according to the background characteristics of the reader.

² See, for example, *Montreal Gazette*, A8, October 30, 1991.

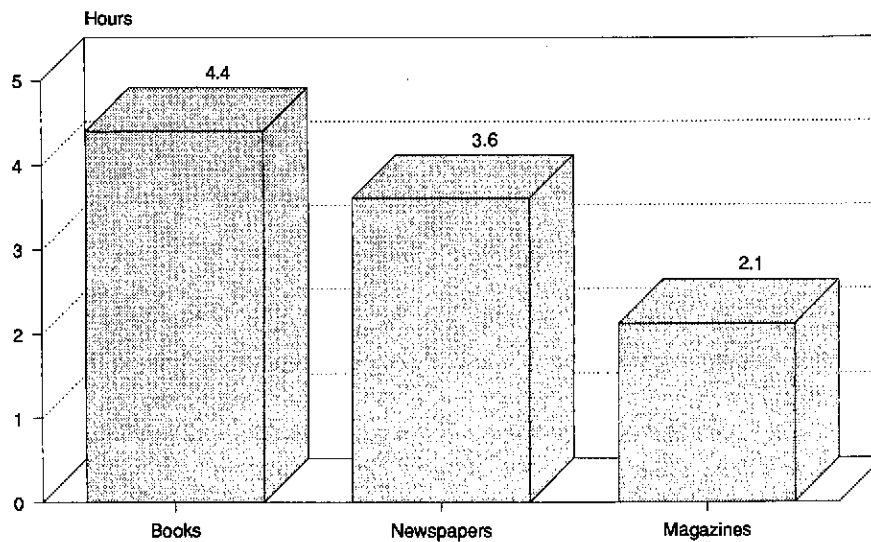
³ Note that summing the estimates of individual types of reading produces a higher overall figure than asking for a single overall estimate. The lower (seven hour) estimate is more plausible.

EXHIBIT 2.1.A
**PERCENTAGE OF RESPONDENTS
BY HOURS SPENT READING IN THE PAST WEEK**



n = 6,680

EXHIBIT 2.1.B
**INTENSITY OF TYPES OF PLEASURE READING
(IN PAST WEEK)**



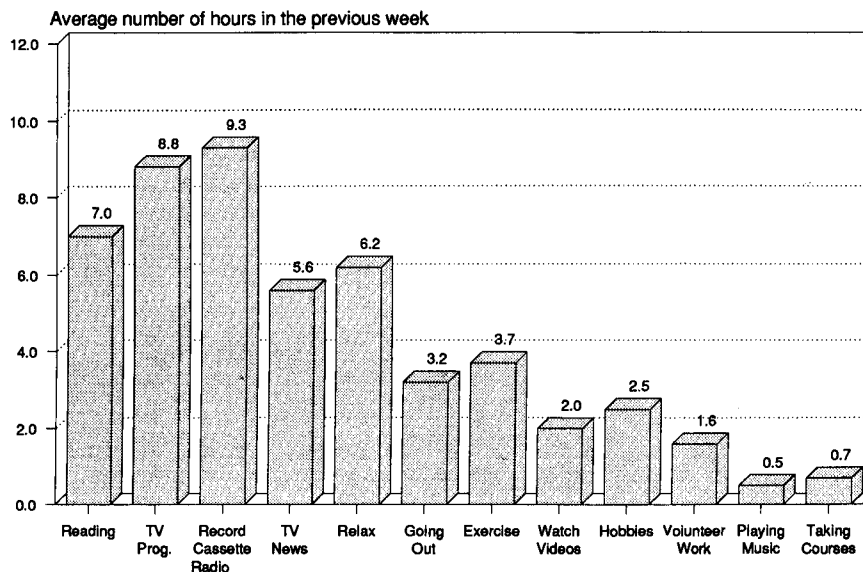
n = 6,700

2.2 THE PLACE OF READING IN EVERYDAY LIFE

Obviously reading for pleasure is a central aspect of most Canadians' everyday lives. Although it is not a rigorous time budgeting study, based on a strict diary, Reading in Canada gives a good sense of how Canadians spend their discretionary time.

Exhibit 2.2.A suggests a crowded menu of leisure activities. The average Canadian appears to set a fierce pace spending over 50 hours per week on a broad range of different leisure pursuits. This estimate is an exaggeration of the total leisure time devoted to these activities. In fact, we often do several things at once (e.g., exercising while listening to music) hence, this total is overstated.

EXHIBIT 2.2.A
LEISURE ACTIVITIES: INTENSITY OF PARTICIPATION



n = 6,700

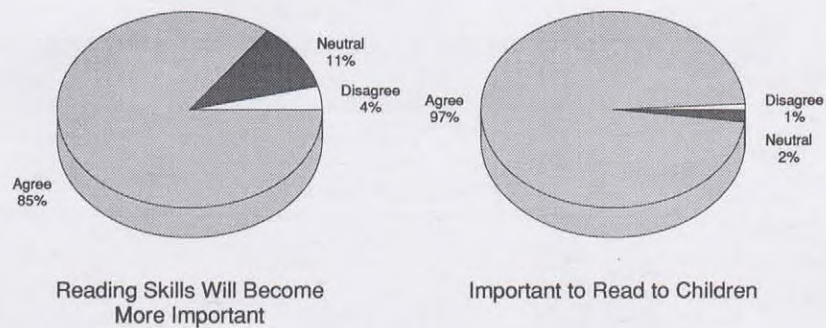
Reading occupies a central and impressive place in leisure time use. It is the third most time consuming activity, following television (conservatively underestimated at about 14.4 hours combining news and other TV programs) and listening to music. In fact, nearly one out of every six hours of discretionary time is devoted to reading.

The centrality of reading to Canadian society is confirmed from a variety of other pieces of study evidence. In addition to devoting substantial amounts of precious leisure time, Canadians spend substantial amounts of money and energy on purchasing books and visiting bookstores (see Chapter 4).

There is also attitudinal evidence to support the thesis that reading is a salient feature of Canadian life. As Exhibit 2.2.B shows, the vast majority of

Canadians believe that "good reading skills will become more important in the next decade" (about 85 per cent agree, four per cent disagree and 11 per cent were neutral). The growing strategic importance of reading to Canadians is even more vividly revealed in their views on the importance of transmitting reading skills to the next generation. Only about one per cent of Canadians disagree with the statement that "it is important that a parent read to their young child."

EXHIBIT 2.2.B
**SELECTED OPINION INDICATORS
 ON IMPORTANCE OF READING**



n = 6,700

2.3 SEGMENTATION

The average Canadian is an elusive character. In reality, there are profound differences in individual attitudes, ability and reading behaviour. Fortunately, some of this variety is better understood when the patterns of difference are related to the background characteristics of the individual. The study does not provide data on all of the factors influencing reading. For example, there are no measures of mental ability or personality type. There are, however, several useful illustrative examples of how reading varies by individual characteristics.

Exhibit 2.3 provides a breakdown of two key indicators — per cent who read last week and hours devoted to reading in the past week. The figures show that there are significant differences across these different groups in both the likelihood of having read and the amount of time spent reading.

Mother tongue is related to both indicators. Anglophones and allophones (non-charter language group members) are more likely to have read in the past week than francophones. Similarly, francophones spent less time

reading (5.6 hours) than anglophones (7.6 hours) and allophones (6.5 hours). There is relative parity across all three language groups in terms of magazine and newspaper reading. It is in the area of book reading that linguistic differences are revealed. This finding is consistent with earlier research. Although more careful historical and socioeconomic analyses are necessary to develop a full explanation of these differences, there are some plausible preliminary explanations. Lower Quebec reading levels probably reflect differences in supply factors and human capital (education) differences between Quebec and the rest of Canada. For example, there are many more English books produced for the global market than French titles. This relatively restricted supply factor is reinforced by a much more poorly developed library system, and lower rates of educational attainment. Later, it will be shown that this difference is narrowing and that Quebecers purchase more books than English Canadians.

On both indicators (i.e., incidence and amount) reading increases with age — although the relationship is only a modest one. Sex has an impact on reading as well. Although there is little difference in likelihood of having read in the past week, women spent more time reading on average. Because the medians⁴ are the same, it is obvious that this average difference is produced by the occurrence of relatively more frequent women readers than frequent male readers. We speculate that older respondents and women respondents may read more for pleasure because they are both less likely to be in the labour force. Also, there are considerably more older women than older men.

Other provincial differences are also evident in the survey results. British Columbians, Nova Scotians and Ontarians are Canada's most enthusiastic readers. Quebec is in last position. The rest of the provinces occupy a more or less middle ground.

Educational effects are surprisingly weak. There are no significant differences in the amount of time spent reading across the different groups. The same finding is true even when we look at the different types of reading (i.e., books, magazines and newspapers).

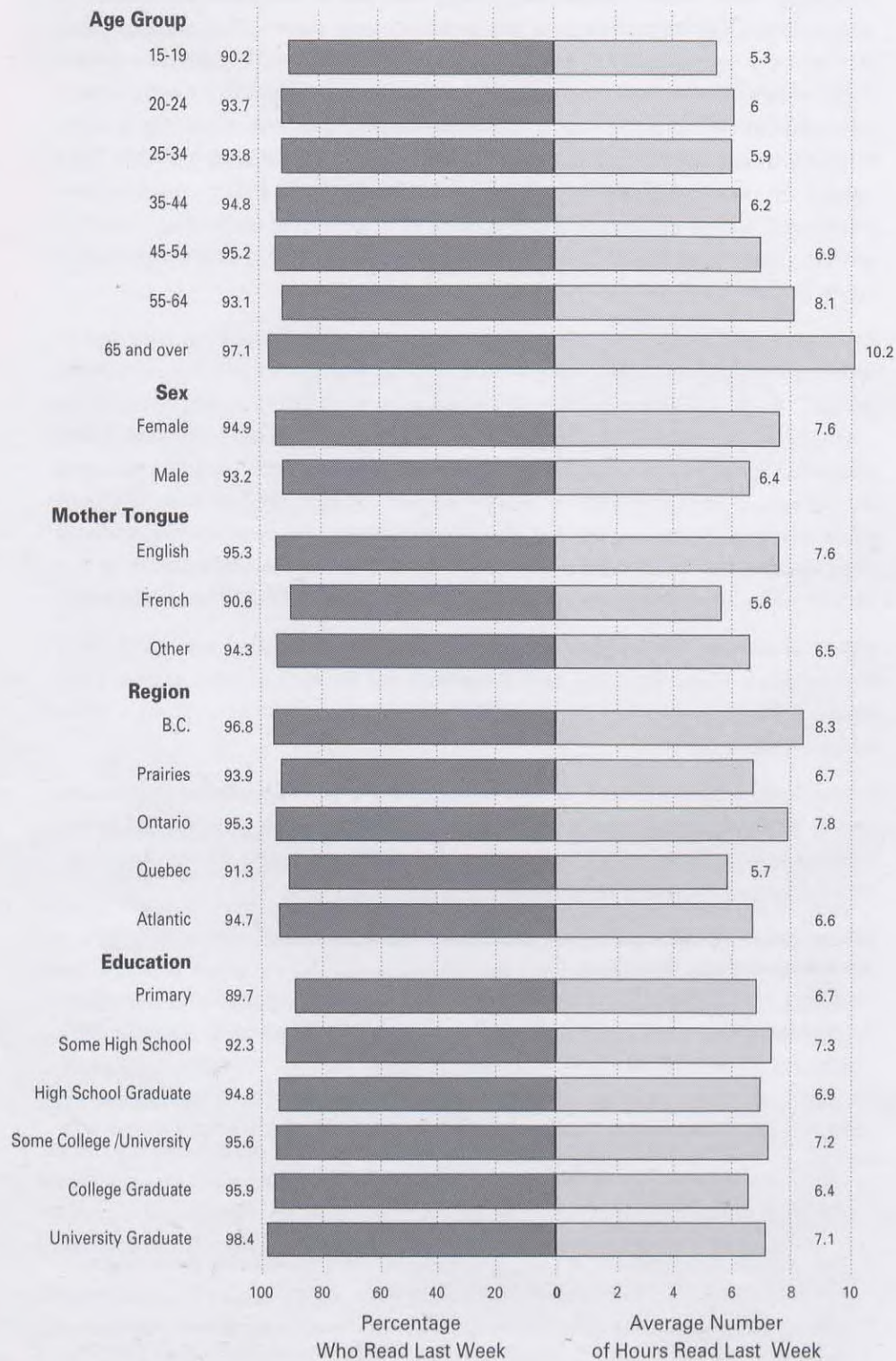
Discussion: Distinguishing Between Instrumental and Expressive Reading

Reading in Canada 1991 demonstrates that the overwhelming majority of Canadians enjoy reading. The sampling bias in the *Reading in Canada 1991* study (i.e., the exclusion of marginally literate Canadians) may partially account for this finding. Despite these biases, the Reading in Canada research confirms similar findings based on the 1978 readership survey⁵ and

⁴ The median is a measure of central tendency — it is the middle point which divides the sample into two equally sized groups.

⁵ See F. Graves and B. Kinsley "Reading Habits of the Illiterate: Functional and Elective Illiteracy in Canada", *Canadian Journal of Education*, 1985 for an earlier development of this argument.

EXHIBIT 2.3
**PERCENTAGE OF RESPONDENTS
 ENGAGED IN LEISURE READING LAST WEEK
 AND AVERAGE NUMBER OF HOURS READ LAST WEEK**

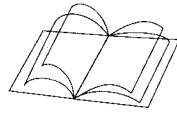


the Southam literacy study conducted in 1986.⁶ Results of these studies suggest that many apparently print averse Canadians do in fact read.

An explanation for the discrepancy between the extent of reading problems discussed in the popular media and the extent of reading activity reported in *Reading in Canada 1991*, may lie in the need to distinguish between the more technical world of literacy skills and the cultural realm of reading enjoyment. For this reason, we introduce the distinction between "instrumental" and "expressive" reading. As noted previously, instrumental reading is done with a specific purpose in mind, while expressive reading is done for its own sake. This distinction is roughly parallel to the distinction between "document" and "prose" literacy. Many Canadians who display literacy problems may not be "print-averse". Much of the reading debate may be inordinately focused on one side of the problem — instrumental reading. This refers to the person trying to negotiate their way through the bureaucratic miasma of technical jargon characterizing the secular world of industry, government and public institutions.

Expressive reading, or more simply reading for fun, may be a much less serious and pervasive problem than many think. In fact, it may be useful to recognize that the basic capacity to read printed symbols is enjoyed by a larger fraction of the population than expected.

⁶ See Ekos Research Associates, "Construction and Testing of a Reading Activity Index" prepared for the Department of the Secretary of State, 1990. Our reanalysis of the data from the Southam Literacy study also revealed a surprisingly large proportion of "illiterate" Canadians who engaged in a significant amount of reading, particularly newspaper and magazine reading. A more detailed technical analysis of the coexistence of document literacy and reading for pleasure will appear in a forthcoming monograph. This analysis considers a variety of data bases measuring both phenomena.



3

CHANGES IN READING

3.1 CHANGES IN THE AMOUNT AND DISTRIBUTION OF READING

The 1991 data support a portrait of a surprisingly literate population. The thesis was introduced that high levels of interest and capacity in expressive reading coexist even in the face of considerable limitations in the realm of instrumental or secular literacy. Is this a recent phenomenon or is it consistent with the past? Judged by the basic literacy yardsticks introduced in the past chapter are Canadians moving forward or backsliding?

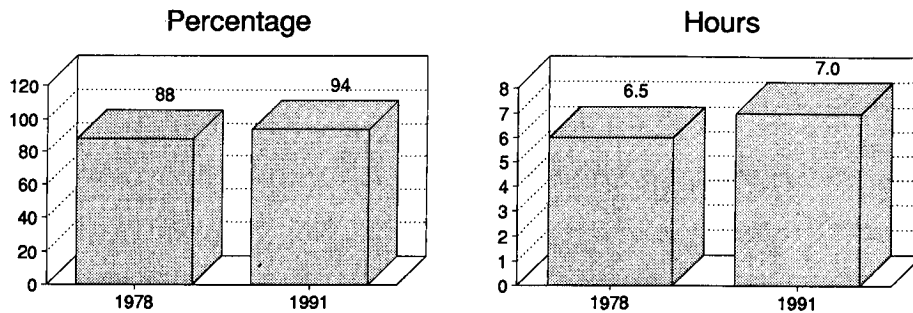
The negativism characterizing concerns about the current status of reading in Canada can also be found in depictions of recent trends. For example, a recent report *Teachers and Literacy*, Warren, *et. al.*, 1991 provides a highly useful review of the literacy debate. One study finding which received prominent treatment in the media was the state of literacy today versus a decade ago. The study provides the views of a particularly knowledgeable group on the question of changes in the quantity and quality of literacy over the past decade — *viz.* secondary teachers who have been in the system for at least 10 years. Forty-three per cent believed the quality of literacy is lower vs only 23 per cent who felt it was higher (the remainder believing in no change (19 per cent) or not knowing (13 per cent)). The Southam Report (Calamai, 1987) claims that one in four Canadians is illiterate and the media have focussed on this negative depiction of Canadian reading skills. Not only are things bad, but according to some of the most privileged witnesses in Canadian society (i.e., teachers), they are actively deteriorating.

Neither this study nor the Canadian Teachers' Federation study provide any hard measures of changes in the quantity and quality of reading. It can, however, be argued that changes in the self-reported reading behaviour of a large representative sample of Canadians drawn at two points in time is a more accurate indicator of these changes in reading levels than the memories and impressions of one of the key stakeholders in the debate. Later in this chapter the high school age cohort will be isolated and compared for these two time periods.

First, consider the overall situation for the broad population of all Canadians. The reader should bear in mind that the least capable readers are

underrepresented and that the absolute amount of time spent reading is somewhat exaggerated by this methodology. Because the 1978 and 1991 methodologies are similar, the comparisons reflect real changes.

EXHIBIT 3.1
**PERCENTAGE OF PARTICIPANTS AND HOURS
SPENT READING FOR PLEASURE PAST WEEK: 1978 - 1991**



The percentage of Canadians who read for pleasure in the past week (all types of materials) rose from 88 per cent in 1978 to 94 per cent in 1991 (Exhibit 3.1). Similarly, average hours devoted to pleasure reading rose from about 6 hours to 7 hours. Both indicators suggest a significant increase in participation rates as well as leisure time budgeted to pleasure reading. It might be argued that some of these (and other) increases may be explained by sampling biases. It is instructive to note that when comparisons are restricted to specific cohorts where there are minimal sample biases (e.g., those with post-secondary education) the pattern of increased reading is confirmed.

Changes in Pleasure Reading by Types of Material

A more complete picture is possible by considering how changes have occurred within the three major categories of reading materials. As Exhibit 3.2 indicates the most spectacular growth has occurred in the area of book reading - presumably the most demanding of all types of reading materials.⁷

The figures suggest impressive growth in the percentage reading books in the past week; from 43 per cent in 1978 to 68 per cent in 1991. The "past year" participation rates went from 63 per cent to 84 per cent. These respectively represent increases of 25 and 21 percentage points since 1978. These findings are consistent with increases in book sales in Canada.⁸ There have also been similar reports of book reading in the U.S.⁹ Increases

⁷ See Graves and Kinsley, *Functional and Elective Illiteracy in Canada*, 1983, which argues that book reading activity is positively related to level of formal education.

⁸ Survey of Book Publishers, Statistics Canada

⁹ The Music Business Survey, *The Economist*, Dec. 21, 1991.

in magazines and newspapers are less auspicious. Moreover, the average time in the past week devoted to newspapers has actually *declined* about a half an hour a week over the time period and for magazines remained flat. Meanwhile, time devoted to book reading has swollen from 2.7 hours in 1978 to 4.4 hours in 1991. This is over a 60 per cent increase.

EXHIBIT 3.2

**READING ACTIVITY:
1978 AND 1991 COMPARISON OF PARTICIPATION RATES**

	Per Cent Participating 1978	Per Cent Participating 1991
Reading Newspapers Last Week	83%	91%
Reading Magazines Last Week	58%	78%
Reading Books Last Week	43%	68%
Reading Books Last 12 Months	63%	84%

Clearly, there has been no decline in reading levels. From these figures it is evident that both the quantity and, quite plausibly, the quality of reading in Canada has improved dramatically in the past 13 years.

**3.2 READING TRENDS IN THE CONTEXT
OF BROADER LEISURE TRENDS**

It is useful to position these changes in reading behaviour within the context of broader changes in leisure behaviour. Is growth in reading an anomalous blip on the cultural radar screen? Exhibit 3.3 provides a sense of how changes in reading fit into parallel changes in other leisure activities.

There are several noteworthy points immediately evident. First of all, Canadians are considerably more active in 1991 than they were in 1978. They have more leisure time and they appear to jam far more activities into their leisure time than they did in the late seventies. This finding conflicts with American surveys showing declining interest in the arts and a general shrinking of leisure time.¹⁰ The American leisure time crisis and declining interest in leisure and culture is contradicted by these data. Other Canadian studies which have featured repeated measures of cultural and leisure indicators support the 1978 to 1991 changes discussed here.¹¹

¹⁰ See Lou Harris Associates, *Americans and the Arts*, 1989.

¹¹ See, for example, Ekos Research Associates Inc., *Linking Artists and Audiences*, Final Report prepared for Communications Canada, 1989.

EXHIBIT 3.3

LEISURE ACTIVITIES: 1978 AND 1991 COMPARISONS

Activity	Per cent Participating Last Week 1978	Per cent Participating Last Week 1991	Per cent Point Difference 1991 - 1978
Watching TV ¹	95%	96%	1
Reading	88%	94%	6
Relaxing	78%	83%	5
Engaging in Exercise	47%	61%	14
Going Out	50%	65%	15
Engaging in Hobbies	33%	39%	6
Engaging in Volunteer Work	20%	29%	9
Taking Courses	11%	11%	0
Playing a Musical Instrument	12%	13%	1

¹ On the 1991 questionnaire watching TV was divided into two categories, watching TV news and watching other TV programs.

3.3 SEGMENTATION

The change in reading activity between 1978 and 1991 naturally leads us to the question of whether these changes occurred across all portions of Canadian society or whether the changes were more pronounced for some segments. Exhibit 3.4 presents the average time spent reading newspapers, magazines and books for selected sociodemographic segments of the Canadian population in 1978 and 1991.

Newspaper reading was substantially lower, by a half an hour, in 1991 across most segments, while magazine reading showed few substantive changes. The relatively large decrease in newspaper reading was more than compensated for by a substantial increase in book reading. Although the time spent reading books increased across all segments of the Canadian population, the increases were the largest for Canadians with the following sociodemographic characteristics:

- Age groups over 44 had the largest increases in book reading, especially the 65 to 69 age group, whose reading rose from 2.9 hours in 1978 to 5.7 hours in 1991, an increase of 2.8 hours, and respondents 70 years of age and over whose reading rose from 2.8 hours to 6.7 hours of book reading in 1991, an increase of 3.9 hours.

- Females' average reading rose from 3.3 hours to 5.4 hours; an increase of 2.1 hours in book reading between 1978 and 1991. Males' reading increased by only 1.2 hours; from 2.1 hours to 3.3 hours in 1991.
- The average time spent reading books increased approximately two hours for four provinces, including British Columbia, Ontario, Nova Scotia and Quebec. The increased book reading for Quebec raised the average reading time from 2.0 hours in 1978, the lowest average time spent reading books of any province, to 3.9 hours in 1991, placing Quebec near the middle of the provincial ranking.

As mentioned earlier, a recent survey revealed that many teachers believe that reading levels among the school age population had declined. This conclusion is not supported by our data which shows an increase of 25 per cent in book reading between 1978 and 1991 for Canadians 15 to 19 years of age. The average time spent reading books rose from an average of 2.8 hours to 3.5 hours in 1991. Just as the apocryphal distance one walked to school increases with age, so teachers' nostalgic perceptions of the good old days exaggerated their former students capabilities with the passage of time.

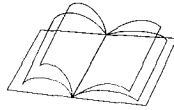
EXHIBIT 3.4
**AVERAGE NUMBER OF HOURS SPENT
 IN THE PREVIOUS WEEK READING NEWSPAPERS,
 MAGAZINES AND BOOKS BY SEX, AGE, MOTHER TONGUE
 AND PROVINCE: 1978 AND 1991 COMPARISONS**

	Newspapers		Magazines		Books	
	1978	1991	1978	1991	1978	1991
Age Group						
15-19	2.5	1.9	2.1	1.9	2.8	3.5
20-24	3.2	2.3	2.0	1.8	3.1	4.5
25-34	3.5	2.6	1.8	1.8	2.6	3.5
35-44	4.2	3.3	1.8	1.8	2.6	4.0
45-54	4.8	3.6	1.8	2.0	2.2	4.3
55-64	5.7	4.6	2.3	2.3	2.9	4.8
65-69	5.6	5.7	2.1	2.5	2.9	5.7
70 and Over	5.3	5.6	1.9	3.0	2.8	6.7
Sex						
Male	4.4	4.0	1.8	2.0	2.1	3.3
Female	3.8	3.2	2.1	2.1	3.3	5.4

continued...

EXHIBIT 3.4 (continued)

	Newspapers		Magazines		Books	
	1978	1991	1978	1991	1978	1991
Mother Tongue						
English	4.3	3.7	2.1	2.1	3.2	4.8
French	3.7	3.4	1.6	1.8	1.8	3.7
Other Language	3.9	3.5	1.7	2.2	2.0	3.3
Province						
Newfoundland	2.6	3.0	1.4	2.3	2.1	4.1
Prince Edward Island	4.2	3.3	2.1	1.9	3.1	3.5
Nova Scotia	3.8	3.6	2.0	2.3	3.0	5.0
New Brunswick	3.8	3.5	1.9	2.0	2.5	3.6
Quebec	3.9	3.4	1.8	1.9	2.0	3.9
Ontario	4.3	3.9	2.0	2.1	2.8	4.6
Manitoba	4.1	3.1	1.9	2.0	2.6	4.0
Saskatchewan	3.6	2.9	1.9	2.0	2.5	4.1
Alberta	4.0	3.6	2.2	2.1	3.2	3.7
British Columbia	4.3	3.7	2.2	2.3	3.8	5.7
Canada	4.1	3.6	2.0	2.1	2.7	4.4



4

BOOK READING AND BUYING

Consumer behaviour provides another important perspective on book reading. Purchasing data provide a useful form of validation for earlier evidence on leisure time expenditures and attitudes. The conclusions drawn from the consumer behaviour data are quite consistent with the evidence considered to this point.

4.1 BOOK READING

Number and Types of Books Read

Canadians are voracious book readers, having claimed to read an average of about 24 books for pleasure in the last 12 months. This is equivalent to every Canadian 14 years old and over reading nearly two books per month. Even acknowledging that reported estimates are significantly overstated,¹² this number is still impressive and surprising.

The distribution of the number of books read in the last 12 months in Exhibit 4.1, proves that this high average is not due to a small percentage of Canadian reading a very large number of books. Only 16 per cent of the survey respondents had not read a book in the last 12 months. Three quarters of Canadians said they read more than two books and a plurality, 43 per cent, had read more than ten books in the last 12 months.

When asked about the types of books read (Exhibit 4.2), respondents were more likely to have read a non-fiction book (70 per cent) than a fiction book (64 per cent). In terms of sheer number of books, fiction books enjoy a discernable numeric advantage. On average, Canadians read more fiction books in the last 12 months compared to non-fiction titles. These statistics contradict the popular notion that the majority of Canadians read only popular "pulp" novels. Over one third of the titles read were non-fiction books. Mystery and romance novels tied for first place with an average of about four books read in the last 12 months, followed by "other" fiction

¹² As stated earlier, the sample probably excludes the 10 per cent of the Canadian population who have little or no reading skills. In addition, social desirability and the tendency to overestimate when asked to recall events over a long time period (over remembering) will also inflate these figures.

EXHIBIT 4.1
**PERCENTAGE OF RESPONDENTS READING
 BOOKS BY NUMBER OF BOOKS READ FOR PLEASURE**

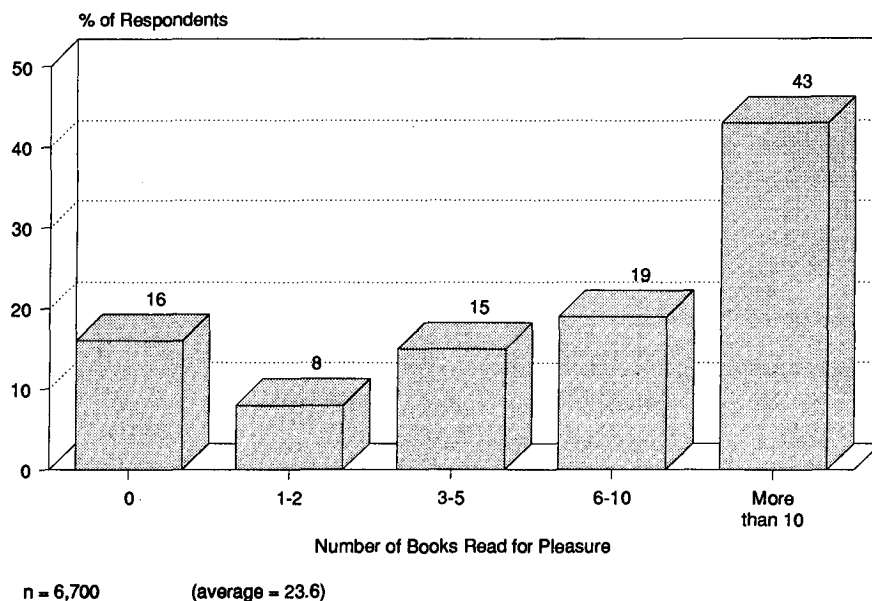


EXHIBIT 4.2
**AVERAGE NUMBER OF BOOKS READ AND
 THE PER CENT OF RESPONDENTS READING FICTION
 AND NON-FICTION BOOKS IN THE LAST 12 MONTHS**

	Average Number Read in Last 12 Months	Per Cent Reading in Last 12 Months
Self-help and how-to books	2.6	57.8%
Other non-fiction	2.5	34.1%
History, documentary, current events, war, politics, science	1.7	39.0%
Biography	1.2	39.0%
Humanities and social sciences	1.1	27.3%
Art books, coffee table books	1.0	24.0%
Manuals and reference	0.9	27.4%
Total Non-Fiction¹	9.2	70.3%

continued...

EXHIBIT 4.2 (continued)

	Average Number Read in Last 12 Months	Per Cent Reading in Last 12 Months
Mystery	4.2	39.7%
Romance	4.2	33.3%
Other fiction	3.1	35.1%
Science fiction, fantasy, horror	2.3	29.1%
Classic literature	1.5	27.6%
Cartoon books	1.1	21.2%
Western	0.8	11.2%
Humour	0.8	26.1%
Drama	0.6	12.9%
Poetry	0.3	12.2%
Total Fiction¹	15.2	63.6%

¹ Note that the totals for fiction and non-fiction are based on the sum of the individual categories and may vary from the sum of the individual averages due to rounding errors and missing data for each respondent.

books at three titles read. The next most popular types of books read were the non-fiction categories. In the never ending search for self-improvement, financial security, better gardens and the elimination of stubborn stains, Canadians read about two and one half "self-help" and "how-to" books in the past year. A similar number of "other" non-fiction books were read in the past year.

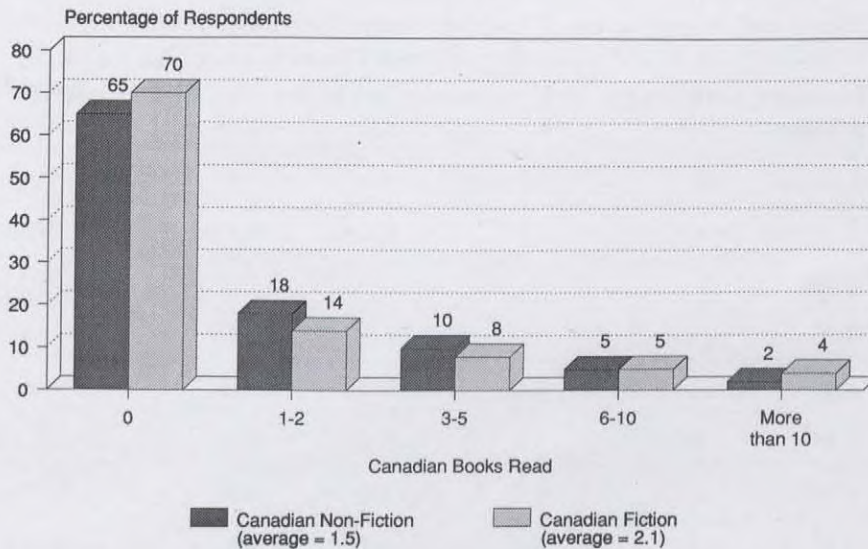
Canadian Books

The issue of Canadian books is very much in the public eye. In recent months, Canadian publishers have experienced severe financial difficulties leading to the demise of some landmark publishers. Publishers have expressed the acute problems they confront and this has engendered a variety of reactions. One of the least sympathetic and highest profile responses was one Member of Parliament's denouncement of Canadians' book reading interest in general, and the interest in Canadian titles in particular. The ensuing response of Canadian publishers and authors has been one of predictable outrage. In an attempt to substitute light for heat we suggest that Reading in Canada can provide a timely, factual contribution to this debate.

Canadians claim to read an average of approximately three books by Canadian authors and, among book readers, over 17 per cent of the books read were said to be Canadian. As shown in Exhibit 4.3, over half the Canadian books read were fiction, 2.1 on average, while an average 1.5 of the non-fiction books read were said to be by Canadian authors. The findings for the split between Canadian fiction and non-fiction books are similar to those for books overall. Canadians read more Canadian authored fiction books, but a larger percentage of the population reads at least one Canadian authored non-fiction books (35 per cent) than fiction books (30 per cent).

These statistics vividly contradict recent statements that implied only a very small percentage of the population read Canadian books. On the contrary, nearly 44 per cent of Canadians recalled they had read at least one Canadian book in the past 12 months. Given the low levels of recognition of Canadian authors, the reported nationality of authors must be treated with caution. A survey of Canadians' awareness and knowledge of cultural figures noted that while Canadians claimed to recognize the names of artists presented to them, few knew their occupation or citizenship.¹³

EXHIBIT 4.3
PERCENTAGE OF RESPONDENTS
READING CANADIAN BOOKS IN THE LAST 12 MONTHS



¹³ For example, while almost 50 per cent of Canadians recognized Margaret Atwood, only 30 per cent could identify her as a Canadian author. See Ekos Research Associates Inc., *Linking Artists with Audiences*, Final Report prepared for Communications Canada.

Segmentation

Exhibit 4.4 presents an overview of total book reading and Canadian book reading activity for selected sociodemographic segments of the Canadian population. The profile for the total number of books read for pleasure in the last 12 months is similar to the pattern for the hours spent reading books for pleasure in the last week. The largest number of books are read by Canadians over 65 (34 books) and between the ages of 15 to 19 (25 books), anglophones (27 books), females (30 books), residents of British Columbia (31 books), and Ontario (27 books), Canadians with some college or university education (29 books), or completed university (26 books).

Although the pattern for reading Canadian authored books in the various segments (of the population) is similar to the incidence of reading books overall, there were some notable findings specific to reading Canadian books.

- Young Canadians not only read a large number of books, they read, on average, 5.3 Canadian authored books in the past 12 months, the highest number of any segment in this analysis.
- Women read nearly twice as many Canadian books as men, but of the books read, women and men read the exact same proportion of books by Canadian authors, 17.5 per cent.
- Francophones, who read nearly half as many books as anglophones, read nearly the same number of Canadian authored books (3.3 books) as anglophones (3.6 books) and read more Canadian non-fiction (1.9 books) than anglophones (1.4 books) or allophones (1.3 books). Among book readers, francophones reported the highest percentage of Canadian books read, 22.4 per cent of all books read in the past 12 months.

EXHIBIT 4.4

**AVERAGE NUMBER OF TOTAL BOOKS AND
CANADIAN BOOKS READ IN THE LAST 12 MONTHS
BY SELECTED SOCIODEMOGRAPHIC CHARACTERISTICS**

	Average Number of Books Read	CANADIAN BOOKS			Average Per Cent of Books Read that were Canadian ²
		Average Number of Canadian Books Read ¹	Average Number of Canadian Non-Fiction Books Read	Average Number of Canadian Fiction Books Read	
Age Group					
15-19	25.4	5.3	1.8	3.7	20.3
20-24	24.6	3.3	1.4	2.0	16.4
25-34	21.3	2.9	1.3	1.7	16.4
35-44	23.6	3.2	1.6	1.8	17.3
45-54	22.2	2.8	1.5	1.4	15.6
55-64	21.3	2.8	1.4	1.8	17.2
65 and over	33.9	4.2	2.0	3.1	18.9
Sex					
Female	30.4	4.4	1.8	2.9	17.5
Male	16.6	2.4	1.2	1.4	17.5
Mother Tongue					
English	28.1	3.6	1.4	2.4	15.6
French	15.5	3.3	1.9	1.6	22.4
Other	17.6	2.6	1.3	1.6	17.3
Region					
B.C.	31.5	4.3	1.8	2.7	14.6
Prairies	22.2	3.0	1.3	2.0	16.1
Ontario	26.9	3.3	1.3	2.3	16.5
Quebec	16.4	3.5	2.0	1.7	22.8
Atlantic	24.0	3.4	1.6	2.2	15.9

continued...

EXHIBIT 4.4 (continued)

	CANADIAN BOOKS				
	Average Number of Books Read	Average Number of Canadian Books Read¹	Average Number of Canadian Non-Fiction Books Read	Average Number of Canadian Fiction Books Read	Average Per Cent of Books Read that were Canadian²
Education					
Primary	21.1	2.0	1.3	1.4	19.8
Some High School	21.5	3.7	1.4	2.5	17.5
High School Graduate	24.2	2.8	1.3	1.7	15.5
Some College / University	28.7	4.2	1.9	2.4	17.8
College Graduate	21.4	3.1	1.6	1.6	16.5
University Graduate	25.8	4.1	1.8	2.5	18.1
Canada	23.6	3.4	1.5	2.1	17.5

¹ Note that the total is based on the sum for the individual respondents and may vary slightly from the averages of fiction and non-fiction books due to rounding errors and missing data.

² Percentage is calculated for book readers only, based on the number of Canadian books read divided by the total number of books read.

4.2 BOOK BUYING

Number of Books Purchased

On average, respondents claimed to have purchased six books in the last three months and 68 per cent had purchased at least one book in the past three months (see Exhibit 4.5). These purchases included books bought for others (e.g., as gifts and possibly for children). The average number of Canadian books purchased was 1.4, or approximately 23 per cent of all books purchased. This percentage is slightly higher than Canadian books read as a proportion of total books read. This may mean that Canadians are more likely to buy Canadian authored books than to borrow them. Over one third of the respondents recalled purchasing at least one Canadian book in the last three months.

Segmentation

Exhibit 4.6 presents the statistics for number of books Canadians purchased for selected sociodemographic segments of the Canadian population. The characteristics of book purchasers stand in marked contrast to book readers. The most notable differences include the following:

- The youngest and oldest age groups read the most books but have nearly the lowest average number of books purchased, five books on average. The 35 to 44 age group purchased an average of seven books, the highest of all the age groups.
- Females who read nearly twice as many books as males purchased just slightly more books (6.8 books) than males (5.1 books).
- Francophones and Quebecers read fewer books than anglophones or residents of other regions in the country. However, francophones purchased over eight books on average, a significantly higher number than other linguistic groups or regions. Also, francophones purchased 2.6 Canadian authored books, more than double the anglophone average of 0.9 books. Over 36 per cent of the books purchased by francophones were by Canadian authors compared to 18 per cent for anglophones which was even lower than the 24 per cent recorded for the allophone population.

EXHIBIT 4.5
**PERCENTAGE OF RESPONDENTS
PURCHASING BOOKS IN THE LAST THREE MONTHS**

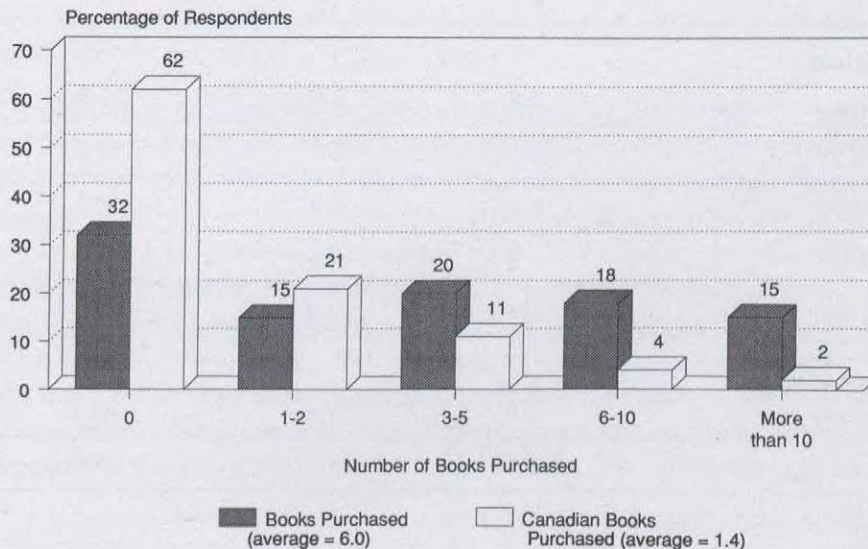


EXHIBIT 4.6

**AVERAGE NUMBER OF CANADIAN
BOOKS PURCHASED IN THE LAST THREE MONTHS
BY SELECTED SOCIODEMOGRAPHIC CHARACTERISTICS**

	Average Number of Books Purchased	Average Number of Canadian Books Purchased	Average Per Cent of Books Purchased that were Canadian ¹
Age Group			
15-19	5.0	1.1	18.0
20-24	6.5	1.4	20.5
25-34	6.7	1.2	20.9
35-44	7.2	1.4	21.0
45-54	6.7	1.5	25.1
55-64	4.8	1.6	28.0
65 and over	5.0	1.2	29.9
Sex			
Female	6.8	1.6	23.0
Male	5.1	1.1	23.5
Mother Tongue			
English	5.4	0.9	17.5
French	8.2	2.6	36.2
Other	4.1	1.0	24.0
Region			
B.C.	6.2	0.8	15.8
Prairies	4.7	0.9	16.9
Ontario	5.0	0.9	18.7
Quebec	8.3	2.5	34.8
Atlantic	5.4	1.3	25.0
Education			
Primary	4.0	1.6	40.3
Some High School	5.0	1.1	21.9
High School Graduate	6.8	1.3	21.6

continued...

EXHIBIT 4.6 (continued)

	Average Number of Books Purchased	Average Number of Canadian Books Purchased	Average Per Cent of Books Purchased that were Canadian¹
Education (continued)			
Some College / University	7.2	1.3	19.4
College Graduate	6.2	1.3	21.4
University Graduate	8.1	1.6	20.7
Canada	6.0	1.4	23.2

¹ Calculated for book buyers only, based on the number of Canadian books purchased divided by the total number of books purchased.

4.3 SUPPLY AND PRICE

Commercial versus Non-Commercial Sources

Canadians obtain their books from a broad range of sources. Exhibit 4.7 shows the percentage of the survey respondents who obtained their last book read from various commercial and non-commercial sources. Canadians are almost equally likely to have obtained their last book read from a non-commercial source (49 per cent) as a commercial source (51 per cent).

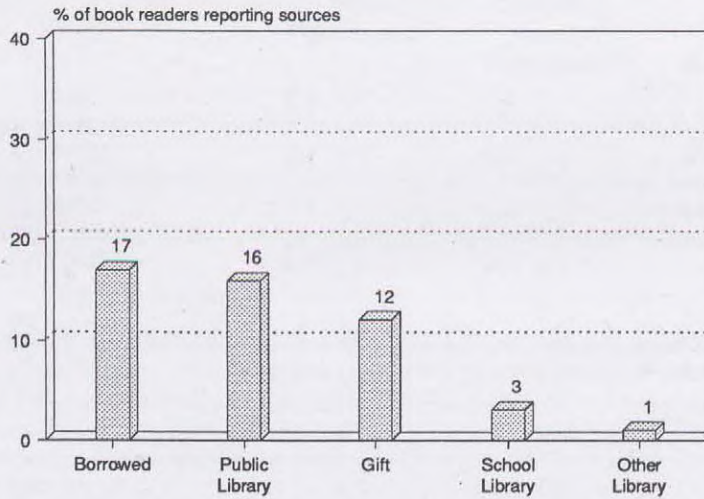
The most common source was a bookstore. Approximately 27 per cent of Canadians obtained the last book read at a bookstore. Borrowing from friends or family and the public library were second and third place sources at 17 per cent and 16 per cent, respectively.

Not all commercial sources of books cited represent a book sold for the book publishing industry and conversely not all non-commercial sources are the loss of a potential book sale. Gifts are a non-commercial source of books for the recipient, but in most cases the individual giving the gift would have purchased it at a commercial outlet. Some commercial sources such as secondhand bookstores, book exchanges or book banks, and book fairs featuring used books recycle previously purchased books and do not create new sales for the industry. These sources combined account for less than five per cent of the market. Borrowing from friends, family or libraries are a more significant source of lost sales for the book industry than commercial operations that recycle books.

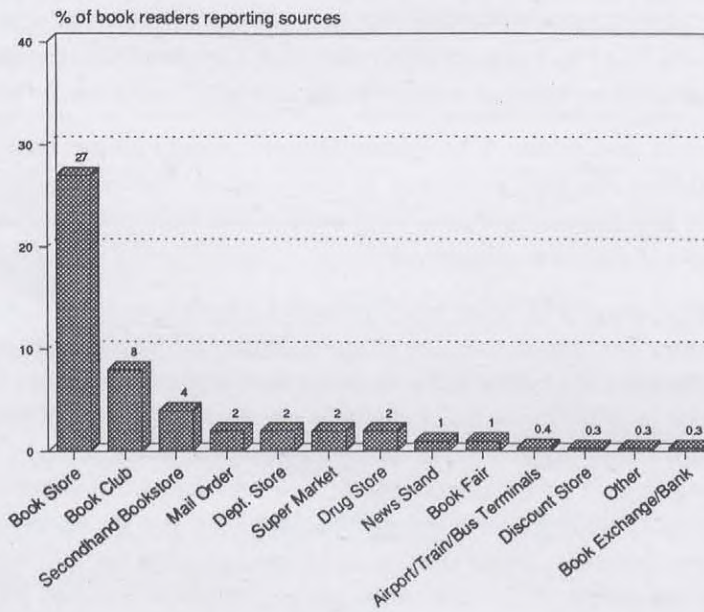
The traditional bookstore owner who sells new books must not only compete with non-commercial sources for books and purveyors of used books, but also stores that sell books as one of many product lines. These commercial competitors for traditional bookstores include department stores, drug

EXHIBIT 4.7
**SOURCES OF BOOK SUPPLY:
 COMMERCIAL VS NON-COMMERCIAL SOURCES**

Non-Commercial Sources



Commercial Sources

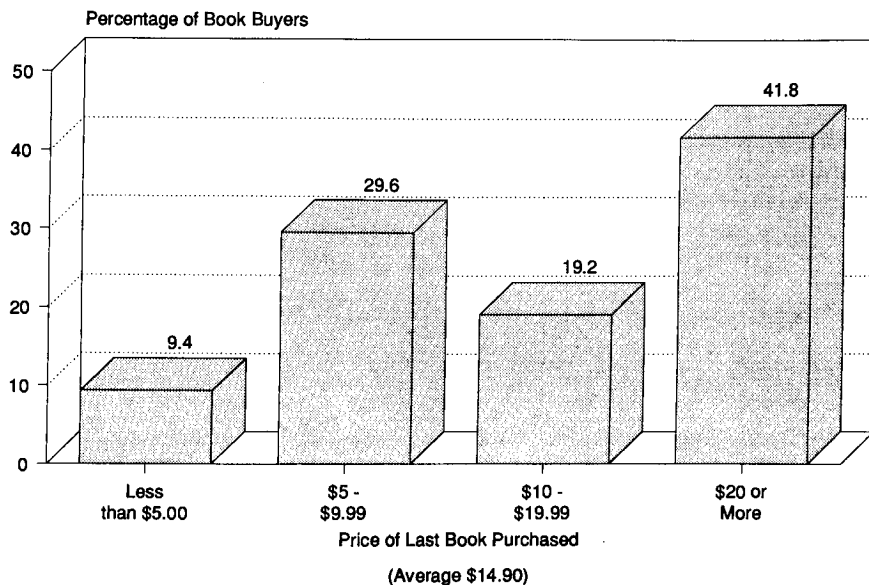


stores, airport, train and bus terminals, newsstands, discount stores and other sources. Collectively, these sources account for less than seven per cent of the sources of books. While this is not a large segment of the market, it contributes towards the fragmentation of the commercial market (along with the sellers of secondhand books). The single biggest competitors in the commercial market for traditional bookstore owners are book clubs and mail order services. Book clubs and mail order services were the source of the last book read for ten per cent of Canadians, over one third the size of the traditional bookstore market. This fragmentation of the commercial market makes it increasingly difficult to operate profitable traditional bookstores, especially for independent booksellers who cannot rely on volume purchasing to improve their profit margins.

Price

Canadians paid on average just under \$15 for the last book they had bought. Exhibit 4.8 shows the distribution of Canadians' book purchases according to selected price ranges for the books purchased. Only nine per cent of Canadians paid less than \$5 for their book, over one third paid under \$10. A plurality of Canadians paid \$20 or more for the book they purchased.

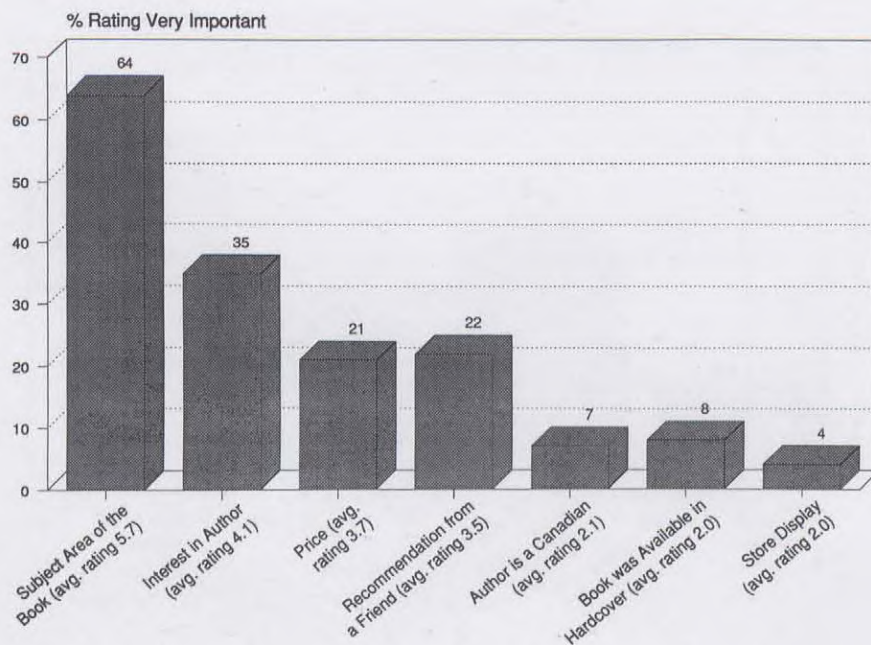
EXHIBIT 4.8
**PERCENTAGE OF BOOK BUYERS
BY PRICE OF LAST BOOK PURCHASED**



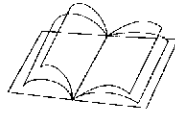
Although price is not the dominant factor in the selection of purchased books, it is an important consideration for many Canadians. Book purchasers were asked to rate the importance of 14 factors in their decision to select the last book purchased.¹⁴ Price was the third highest rated factor in Canadians' book purchasing.

Exhibit 4.9 presents the per cent of book purchasers who rated factors in their decision as very important (a score of six or seven on the scale) for selected variables. The subject area of the book was clearly the prime factor in the purchasing decision; 64 per cent of the readers rated this reason as very important. The second most important factor was interest in author (35 per cent), followed by price (21 per cent) and recommendation from a friend (22 per cent). The least important factors were Canadian authorship (seven per cent), if the book was available in hard cover (eight per cent) and store display (four per cent).

EXHIBIT 4.9
**PER CENT OF BOOK PURCHASERS
RATING VARIOUS FACTORS AS VERY IMPORTANT**



¹⁴ The ratings were on a seven-point scale where one was *not at all important*, four was *somewhat important*, and seven was *extremely important*.



5

CHILDREN'S READING

The *Reading in Canada 1991* survey included a large number of questions on children's reading activities, parental involvement in their child's reading and parents' perceptions of children's reading. The subsection on children's reading habits was answered only by respondents with children aged 14 or less living with them. For parents with more than one child in this age group, responses referred to the child who had the most recent birthday.

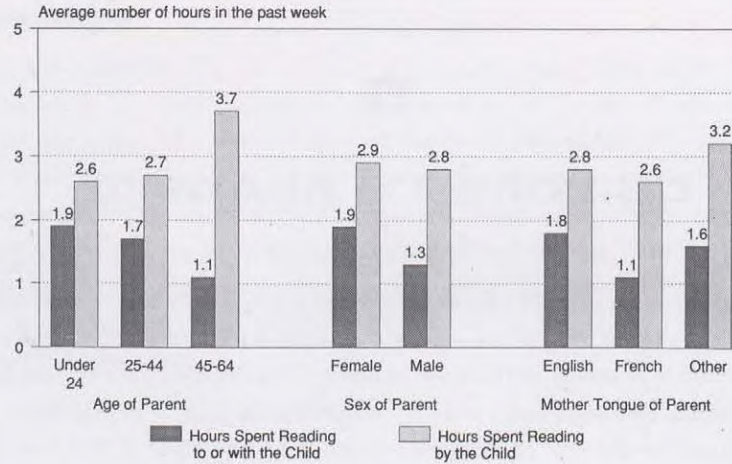
5.1 CHILDREN'S READING

Children's reading activities were reported by parents and, consequently, should be interpreted with caution. Secondhand information of this nature is not ideal, particularly with older children, as parents may simply not know the extent of reading behaviour. Nevertheless, comparisons of reported children's reading among different demographic groups provides extremely interesting information. The time spent reading to or with children is not second hand information and these estimates should be more reliable.

On average, parents reported spending 1.6 hours reading to or with their child in the past week and parents estimated that their child spent 2.8 hours in the past week reading on their own. Exhibit 5.1 illustrates differences in two key indicators of children's reading activity — time spent reading to or with the child and time the child spent reading on their own — based on the demographic characteristics of the parents. Not surprisingly, older parents — presumably having older children — spent less time in the past week reading to or with their child. These parents, however, reported more time spent by their child reading on their own.

Sex is also related to amount of time spent reading to or with the child. Mothers tend to spend much more time reading to or with their child than fathers. Differences in children's reading activity are also evident based on mother tongue. Anglophone parents reported reading to or with their children for 1.8 hours in the past week, allophones reported 1.6 hours, while francophone parents claimed to have read to or with their children for only 1.1 hours on average.

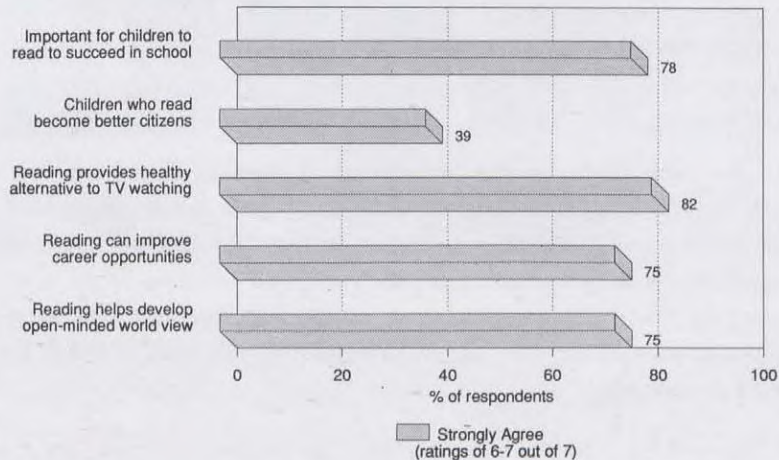
EXHIBIT 5.1
CHILDREN'S READING ACTIVITY
BY CHARACTERISTICS OF PARENT

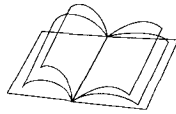


5.2 PERCEIVED BENEFITS OF CHILDREN'S READING

Parents' perceptions of the benefits of children's reading are presented in Exhibit 5.2. Most parents strongly agreed that reading is a healthy alternative to television viewing and that it is important for children to read for pleasure in order to succeed in school. Three quarters of the respondents also agreed that reading can improve children's career opportunities and that it helps develop a more tolerant and open-minded world view. The importance of reading for becoming a better citizen was less strongly supported, with only 40 per cent rating this as being very important.

EXHIBIT 5.2
CHILDREN'S READING:
BENEFITS CHILDREN GAIN FROM READING





6

CONCLUSIONS

Reading in Canada 1991 provides fresh insight on the place of pleasure reading in Canadian society. Perhaps the most important conclusion is that reading for pleasure is a central aspect of most Canadians' lives. The study results clearly bring into question some of the current thinking that many North Americans are not interested in reading.

The centrality of reading is vividly confirmed in terms of the attitudes and behaviour of the vast majority of Canadians. Another clear conclusion is that books are the main staple of Canadians' reading diet. The less demanding newspapers and magazines command less time.

This somewhat surprising finding of a robust literacy culture in Canada is also revealed in terms of the tremendous importance Canadians place on reading for children. Not only do we believe that it is crucial to encourage children's reading for pleasure, but most families devote significant time and financial expenditures to children's reading.

Reading figures prominently in the leisure pursuits of Canadians. It is the third most important component of the impressively busy leisure regimens maintained by Canadians. Naturally, there are important variations in reading across different segments in Canadian society. Women, older Canadians and residents of British Columbia, Ontario and Nova Scotia are more active readers. Francophones read less. Education has a surprisingly weak relationship with reading.

There are important trends evident in the reading behaviour of Canadians. Once again, it is obvious that there is undue negativism about changes in our reading interest. Comparison to a benchmark 1978 survey reveals overall positive growth in the numbers of Canadians reading and the amount of time devoted to reading. This growth is very much focused in the area of book reading.

The most auspicious improvements have occurred in some important segments of Canadian society. Older Canadians (65 years and over) are reading much more than they were 13 years ago. This trend may reflect the long term returns on massive investment in universal public education around the period of the 1940's. It may also reflect the increased leisure time and relatively more active and healthy lifestyles of contemporary

seniors. This trend has important implications for the publishing industry and library sector in light of the impending demographic changes accompanying the greying of Canada.

Women have also widened the gender gap which already favoured them (slightly) in 1978. In 1991 women devoted considerably greater amounts of time to reading books — although they continue to be less devoted consumers of newspapers.

Several provinces have displayed more rapid progress in reading activity than others. The most dramatic development has occurred in Quebec. The amount of time devoted to book reading in Quebec has almost doubled over the relatively brief period from 1978 to 1991. These impressive gains undoubtedly reflect the profound consequences of the quiet revolution.

Reading in Canada 1991 has a broad range of consumer data which is of both general interest and special importance to publishers and policy-makers. Consumer data shows that Canadians selected a wide array of fiction and non-fiction books. Non-fiction books are read by a greater number of Canadians than fictions books, although fiction books are read in greater numbers. Canadians do not typically select a book simply because it is by a Canadian author. Despite this, Canadians do read Canadian authored books, presumably because of their merit and not simply nationalistic preferences.

The book reading and book buying markets are substantially different. Older and younger Canadians who read the most books are at the bottom of the book buying market and francophones, who spent less time reading books, buy more books than anglophones.

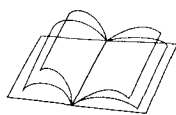
The traditional bookstore owner faces a fragmented marketplace. Bookstores must not only compete with libraries and books loaned from friends, but a variety of commercial sources ranging from secondhand bookstores to book racks in drug stores. Many of these competitors do not specialise in books and sell only the best seller lists. The traditional bookstores, especially the independent booksellers, are under increasing competitive pressures from these other commercial outlets and they may not have reaped the full benefits from the increase in book reading over the last decade.

Yet the overall trends in demand suggest a vibrant and growing market. Linked with broader patterns of consumer demand it would appear that the Canadian publishing industry may be poised to benefit from this state of affairs.

It is premature to draw strong recommendations from this preliminary analysis. There are, however, some interesting implications which may point to the need for rethinking some fairly basic aspects of the publishing industry and the fundamental way we understand reading and society. Much of the current thinking and popular imagery reflects a profoundly distorted conception of Canadians as "print-averse." We must recognize that

expressive reading is generally healthy and growing. The puzzling coexistence of a robust literacy culture in the pleasure field does not deny the fundamental and pervasive problems with what we have labelled instrumental reading.

At a still more basic level, this study brings into question our collective self-image. It is evident that many Canadians are failing to appreciate the vibrancy and salience of reading in Canada. This may be a more particular expression of a disturbing general trend to overstate the problems in Canada while failing to celebrate, let alone recognize, our strengths and achievements.



APPENDIX A BIBLIOGRAPHY

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