



Printed Matters Book Publishing Policy and Programs

Annual Report // 2003-04



Creating Canada Together

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Foreword

>> The Canadian Book Publishing Development Program was created in 1979 to be the Government of Canada's main tool for supporting our book industry. In that same year, the Soviet Union defeated Czechoslovakia to win the world ice hockey championships. Just a few years before that, the futuristic-looking Concorde took



commercial passenger flight to the super-sonic level for the first time. And the first Concorde passengers might have driven to the airport in cars equipped with a popular audio technology of the day – an eight-track tape.

Times have changed quite a bit since then. These days, the U.S.S.R. and Czechoslovakia hockey dynasties, not to mention the nations themselves, are history. The Concorde flew into retirement in 2003. Eight-tracks were replaced by cassette tapes, which were subsequently replaced by CDs, which now must compete with new digital technologies.

And the Canadian Book Publishing Development Program? It's still the Government of Canada's main tool for supporting our book industry. Printed books themselves, with the advent of e-books, were once touted to soon be as obsolete as the eight-track. But sales of paper-and-ink books continue to grow.

Not everything has remained the same about the program, of course. Its name has changed from the original to the Book Publishing Development Program to the current, and much catchier, Book Publishing Industry Development Program, or BPIDP. The annual funding the program provides to the book industry has gone from \$6M in 1979 to approximately \$36M today. BPIDP has developed many new initiatives and projects with the industry to improve such critical areas as book marketing and the supply chain. In a number of countries around the world, the program has come to be regarded as a model public- and private-sector partnership for developing excellence in book publishing.

Along with the evolution of the program, the Canadian book industry itself has changed markedly, and remarkably, since 1979. There are nearly three times as many Canadian-owned publishers as there were twenty-five years ago. There are four times as many books published each year by Canadian houses. There are five times as many Canadian authors – writers who are celebrated both nationally and internationally. In 2002, a Canadian writer won the Man Booker

Prize, the third time a Canadian has taken home one of the world's preeminent literary awards.

CANADIAN BOOKS, THEN AND NOW

	1979	2004
Publishers in BPIDP	90	220
Titles published	2,162	6,264
Total BPIDP funding	\$6M	\$36M

This report, the second edition of *Printed Matters*, reviews the Department of Canadian Heritage's contribution to the success of Canadian books in 2003-04. It discusses the priorities of the Department's Publishing Policy and Programs Branch with respect to books; the support provided to the industry by the various components of BPIDP; and the Branch's other projects and initiatives.

Ch.01

Canadian Books to Canadian Readers

>> Culture and business. Business and culture. It is axiomatic to say that the two have, on occasion, competing priorities. It is the mandate of BPIDP to help make this partnership successful. The program supports the development of a strong Canadian book industry in order to give Canadians better access to the stories, ideas and knowledge that reflect the richness and diversity of our culture. BPIDP has been designed around the principle that a viable Canadian-owned publishing sector is the best vehicle to deliver Canadian books to Canadian readers. In essence, BPIDP employs industrial means to help achieve cultural objectives.

The program's ongoing mission is to advance these cultural objectives despite the complex market conditions faced by Canadian publishers, which include the small Canadian market and competition from large international publishing firms. Too much focus on business factors could result in a dilution of BPIDP's cultural mandate. Too much emphasis on cultural results could slow down the rate of development of the Canadian publishing sector.

Since 1979, a number of steps have been taken to strengthen the cultural objectives of the program, such as modifying the eligibility criteria to give official language minority and aboriginal publishers greater access to funding.



In 2003-04, a significant step in the reinforcement of BPIDP's cultural mandate was the decision to remove sales of foreign-authored titles that were not translated or adapted by a Canadian from the program's eligible sales. This decision was necessary to clearly and unambiguously reinforce the mandate of the program: *Canadian books to Canadian readers*.

At the same time, the program has evolved considerably over the years in response to the challenging market conditions faced by Canadian publishers. In each component of BPIDP, program elements have been modified to respond to the day-to-day business realities of the Canadian book industry.

By balancing the need and desire for a strong and diverse cultural voice with clearly established commercial goals, the program has developed into an exemplary model of support. The impact has become long-term and far-reaching

Valerie Hussey
President and Publisher, Kids Can Press

The funding provided by the program has increased from \$6M in 1979-80 to over \$36M in 2003-04. The recognition of the growing importance of export markets to Canadian publishers has led to annual BPIDP funding in the amount of \$4.8M for the Association for the Export of Canadian Books, which administers the program's International Marketing Assistance component. The blunt measure of 'profitability' has been removed from the program's eligibility criteria in favour of a broader approach to assessing the financial viability of applicants.

The industry's commitment to adopt new information management technologies has led to the development of a new component of the program – the Supply Chain Initiative – solely dedicated toward improving supply-chain management throughout the book trade. In 2003-04, support of this effort was \$2.8M for publishers, distributors and wholesalers, and has contributed to the industry's adoption of such efficiency-enhancing technologies as Electronic Data Interchange.

In 2003, using industry data collected by BPIDP, the Branch produced *Publishing Measures*, a customized, confidential report for each publisher demonstrating its financial performance relative to industry benchmarks. A second version of *Publishing Measures*, based on publisher financial statements submitted to BPIDP in 2003-04 and with new benchmarks for geographical regions, was launched in April 2004.



But the ultimate measure of BPIDP, the true gauge of the program's success, is how effectively it is delivering on its cultural objectives. Canadian books to Canadian readers. For a quarter of a century, the remarkable achievements of Canadian writing have illustrated the value of the role played by BPIDP.

Ch.02

The Book World

>> Canadian literary fiction, British tea-cosy mysteries, American legal thrillers, African folk tales, Japanese haiku poetry. No matter what kind of book you're looking for you can find it in Canada – in our thousands of bookstores and libraries, from online booksellers, in drugstores and grocery stores, at the airport and at your neighbourhood convenience store. This wide world of books is a result of the fact that the marketplace in Canada is incredibly diverse, offering books from Canada and abroad, from publishers of every size, language, nationality and editorial focus.

Although this diversity is integral to the richness of Canadian cultural life, it presents unique challenges for the Canadian-owned book industry. Canadian publishers, mostly small, independent houses, are dedicated to nurturing Canadian writers and ensuring that voices reflecting all facets of our society are heard. However, as noted in chapter one, they must deal with demanding market realities, including the small size of the Canadian market, its two official languages and the presence of major international publishing companies.

There is also competition among publishers for Canadian writers. The large international publishers are often able to offer bigger advances than their Canadian counterparts, reducing the capacity of Canadian houses to benefit from their investment in the initial development of bestselling writers.

In addition to the challenging market conditions faced by Canadian publishers, trends in the book retail sector are making a major impact. The channels through which books reach the public have evolved rapidly in the past few years – big-box stores have exploded onto the retail scene and online bookstores are now increasing their market share.

The additional choice and convenience offered by these new developments are affecting consumer expectations. Demands for an even wider range of products and even quicker delivery are significantly altering the relationships between book publishers, distributors and booksellers. This shift in market expectations has led to Indigo's recent adoption of SAP, a business management software platform, and the move to ONIX, a standard format that publishers can use to distribute electronic information about their books. It has become more apparent than ever that supply chain efficiencies – and inefficiencies – are critical to the business success of the Canadian-owned book industry.

For this reason, the Publishing Policy and Programs Branch continues to focus on working with the industry on projects like the Supply Chain Initiative. And since the majority of Canadian publishers are small or medium-sized firms, the Branch's Industry Development Directorate was created to help examine and address the specific challenges and needs of cultural businesses of this size, such as ownership succession. According to studies conducted by the Directorate in 2003, an estimated 80 to 90 Canadian publishing firms will be offered for sale by their current owners over the next ten years.

GENERAL DISTRIBUTION SERVICES UPDATE

In 2002, a leading English-language Canadian book distributor, General Distribution Services (GDS) dissolved, seriously disrupting the businesses of some of our most important cultural presses. Due to the collapse, these publishers were unable to pay all their supplier accounts and royalties owing to their authors. Many of the publishers lost inventory that was stranded at the GDS warehouse. Many publishing programs for the fall of 2002 were put on hold.

The Department of Canadian Heritage provided one-time financial assistance to 25 affected publishers through special repayable BPIDP contributions. The program also provided funding to the Writers' Union of Canada for an emergency fund for authors affected by the bankruptcy.

Now, more than two years later, the trends in BPIDP's data indicate that the publishers affected by the GDS collapse have turned the corner. Since 2001, the median profit margin of the group has steadily improved as each year more publishers are reporting a positive result. About two-thirds have improved their profit margin since 2001.

In 2003-04, the group affected by the GDS collapse performed equally well in the program's financial viability test with all the other publishers in the program, although their median profit margin remained somewhat below the median of the other BPIDP publishers.

Initiatives and projects like these will help Canadian publishers remain vital, independent and dedicated to publishing books that speak to all Canadians and tell our stories to the rest of the world.

Award Winners:

Cover to Cover, Coast to Coast.

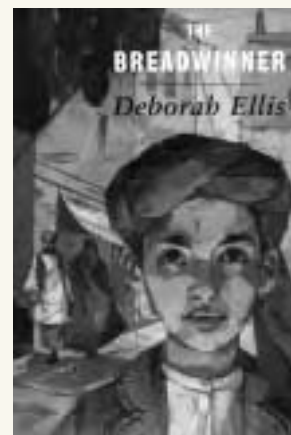


BRITISH COLUMBIA,
Orca Book Publishers,
Aboriginal Library Week Award



Cover by Christian Quesnel

ONTARIO-FRENCH,
Les éditions du Nordir,
Trilium Award



ONTARIO-ENGLISH,
Groundwood Books
(an imprint of Douglas &
McIntyre Publishing Group),
Red Cedar Book Award



PRAIRIES,
University of Alberta Press,
AAUP Book, Journal & Jacket Competition



QUEBEC,
Leméac éditeur (Élise Turcotte,
La maison étrangère, 2002),
Governor Genral's Literary
Award for French Fiction



ATLANTIC,
Goose Lane Editions,
Governor General's Literary
Award for English Fiction

INDIGO'S ADOPTION OF SAP

During 2003-04, Indigo Books & Music Inc., Canada's largest book retail chain, began the implementation of SAP. Indigo's new SAP software platform will oversee almost every aspect of its business, including transactions with book suppliers.

SAP is designed to improve the integrity of Indigo's data and to allow it to manage its inventory much more effectively across the chain. Instead of having a separate inventory for each bookstore, there will be a single, master inventory and sales database. This will give Indigo the ability to determine exactly where any book is in its system and how many copies have been sold in individual stores. The new system should also improve the procurement process, resulting in better forecasting and fewer returns for publishers.

The changeover to SAP has placed some demands on Canadian publishers and distributors. In order for the new system to run smoothly, Indigo suppliers must adjust some of their processes. For example, publishers will have to ensure that their product information, such as trim sizes, delivery lead times, publication dates and carton counts, is accurate and up-to-date.

Through the Supply Chain Initiative, BPIDP has provided support to publishers to improve the quality of their bibliographic data and to distributors to improve their capacity to interface with systems like SAP. These projects, as well as BookNet Canada's work with respect to the provision and promotion of a new Electronic Data Interchange system and bibliographic standards for Canada, will help make the transition to SAP as smooth and efficient as possible.

Ch. 03

A Measured Approach

>> The Book Publishing Industry Development Program is the Government of Canada's main tool for achieving its cultural objectives with respect to Canadian books. The critical role that BPIDP plays makes it essential that the administration of the program be effective and efficient, and flexible enough to respond to the evolving requirements of the industry.

In 2003, an audit of BPIDP was conducted under the Department of Canadian Heritage's Audit and Evaluation Plan. The audit assessed the Branch's administration of the program, covering all components of BPIDP, the management control framework, and the activities and processes related to the program. The audit found that the administration of BPIDP measured up:

- >> The management control framework is appropriate to ensure compliance, effectiveness and financial integrity.
- >> The information used for decision-making and reporting is timely, relevant and reliable.
- >> The risk management strategies and practices are suitable and deliver the intended results.

The audit identified some areas where management practices and processes could be strengthened, especially in managing the relationship with the Association for the Export of Canadian Books (AECB). For example, the audit found that the contribution agreement between the Department of Canadian Heritage and the AECB did not adequately address the need for financial accountability on the part of funding recipients. Beginning in 2004-05, funds will be transferred from BPIDP to the AECB under a contribution agreement with revised cash management provisions.

Timing of BPIDP payments was also identified as an area that could be better aligned with recent Treasury Board policy. As a result, a new payment system was introduced for the Aid to Publishers component of the program. In 2003-04, publishers received two instalments of their funding contribution. The first payment was 90% of the contribution, payable on receipt of signed contracts. The balance was released after submission of a final report on the use of funds by recipients.

The entire audit report is available at www.canadianheritage.gc.ca/bpidp.

The positive results of the audit were reassuring but not unexpected. As it has been in every year since BPIDP's inception, one of the Branch's overriding priorities for supporting our book industry is a well-managed program. The Branch continually strives to make the program as efficient and effective as possible. The reviews of the publishing internship and professional development initiatives of the Aid to Industry and Associations component are recent instances of the Branch's commitment to a well-managed program. This priority not only benefits the publishers who receive funding from BPIDP, it ensures that Canadians receive the best possible return on their investment in our book industry.

BPIDP has made it possible for Éditions Hurtubise HMH to carry out its diversification policy over the past 25 years. We started out essentially as a scholarly publisher, but today we publish in the literary, youth and general sectors, and scholarly publications represent only about 30% of our sales. In 25 years, sales have increased sevenfold and the number of new titles published each year has increased from a dozen or so to over sixty. [translated from French]

Hervé Foulon
CEO, Éditions Hurtubise HMH

The most significant change to the administration of BPIDP in 2003-04 was the new organizational structure of the three components of the program administered by Canadian Heritage. For the first time in BPIDP's history, Aid to Publishers, Aid to Industry and Associations and the Supply Chain Initiative are under the direction of a separate manager and have a team of project officers working exclusively for each component.

BOOK PUBLISHING INDUSTRY DEVELOPMENT PROGRAM FUNDING 2003-04

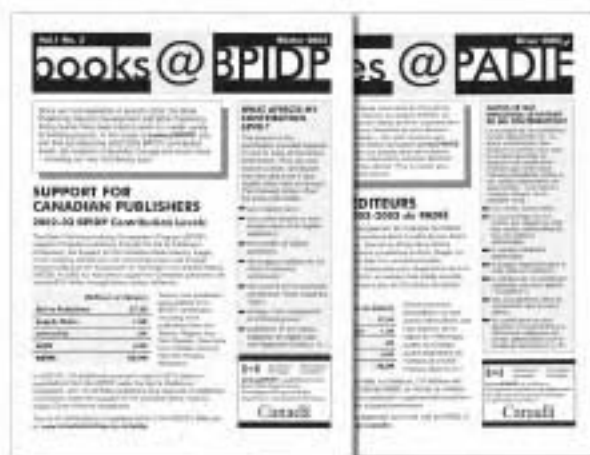


This change was a necessary outcome of the growth of the program over the past several years as new initiatives for the book industry have been developed, such as publishing internships and business planning. In particular, the Supply Chain Initiative, which holds great promise for the long-term health of the industry, had grown in complexity and required a full-time team of program officers. Due to this reorganization, the Branch is now able to devote more targeted attention to its existing components, develop new initiatives, build specialized expertise and gain better overall results.

The Branch's other two main priorities in 2003-04 were also initiated in prior years. Over the past two years, the Branch has been focusing on the creation of business development tools and resources for Canadian publishers. For instance, the program now provides expert industry consultants to help smaller publishers improve business performance. Funding for publishers to develop strategic business plans has also been introduced. As mentioned in chapter one, the second version of a customized, confidential report for each publisher demonstrating its financial performance relative to industry benchmarks was produced in 2004.

Effective communications between the program and the industry is also a long-term priority of the Branch. This includes the continuing production of electronic news bulletins, the *books@BPIDP* newsletter and this annual report. And for the first time, BPIDP has a toll-free number: **1 877 823-0702**.

Also new in 2003-04, Aid to Publishers program officers started a series of informal visits to their client publishers. These face-to-face meetings provide an excellent forum for information exchange. Program officers have the opportunity to receive feedback on BPIDP design and processes; and publishers can learn more about the program's criteria and priorities.



On the more formal side of things, the Branch's annual February meeting with the national book publishing associations was expanded into a series of meetings throughout the year to better facilitate ongoing communication between the program and the national associations. These meetings provide an opportunity for the industry and the Branch to present and discuss key issues and priorities.

TOMORROW STARTS TODAY RENEWAL

In 2001, the Government of Canada announced that, through the *Tomorrow Starts Today* initiative, support for the Canadian book industry would increase by \$28M over three years.

Tomorrow Starts Today has played a critical role in building a stronger, more viable book industry that is better equipped to invest in the production and distribution of Canadian books. Using the existing BPIDP architecture, the new funding has been used to provide additional support to Canadian publishers; create a new program component to strengthen the Canadian book industry supply chain; increase the promotion of Canadian writers; and enhance the research capacity of the Publishing Policy and Programs Branch.

Throughout 2003-04, the Branch worked with the Department's Arts Policy Branch to secure the renewal of the *Tomorrow Starts Today* funding package. These efforts were successful and the Branch is pleased to report that *Tomorrow Starts Today* has been extended for 2004-05.

The Tomorrow Starts Today initiative is extremely important and beneficial for cultural industries in general, and particularly for independent, Canadian-owned publishers such as Garamond Press. It has been instrumental in helping the Book Publishing Industry Development Program make possible the Supply Chain Initiative contributions, and increase the Aid to Publishers contributions.

More specifically, it assisted the program to implement its timely and highly imaginative response to the collapse of General Distribution, which impacted a large number of BPIDP's client base, including Garamond Press. In a cultural industry in which cash flow and good supplier credit relations are critical, initiatives of this type are key to the difference between surviving and flourishing.

Peter Saunders
President, Garamond Press Ltd.

Ch. 04

Aid to Publishers: Focus on Process

>> Aid to Publishers is the cornerstone of BPIDP, providing direct support to Canadian-owned book publishers to encourage the production and promotion of Canadian-authored books. In 2003-04, this component provided \$26.1M in funding to 220 publishers.

BPIDP's 25th year of operation was an active and productive year for Aid to Publishers. The restructuring of the three components administered by the Department was accompanied by a streamlined application process and a shift in the way the financial viability of publishers is determined.

AID TO PUBLISHERS 2003-04

	Total	BC	Prairies	Ontario	Quebec	Atlantic
Number of publishers	220	25	25	61	100	9
New titles published	6,264	532	416	1,239	3,953	124
New titles per publisher	28.5	21.3	16.6	20.3	39.5	13.7
Aid to Publishers contribution	\$26.1M	\$2.3M	\$2.2M	\$7.3M	\$13.6M	\$0.7M

New Application Package

All the BPIDP funding opportunities for book publishers have been brought together in one application package. This package features a new design and a revised guide covering Aid to Publishers, the Supply Chain Initiative for publishers, Business Planning, Publishing Internships and an overview of the International Marketing Assistance component administered by the AECB. All the required application forms are also included in the package.

In previous years, this information was spread throughout three separate application packages. Although the information on project funding for publishers is repeated in the Supply Chain Initiative and Aid to Industry and Associations guides, the new Aid to Publishers package contains all the relevant information.

Financial Viability: A New Approach to Assessment

In 2003-04, BPIDP put in place a more refined method of testing the financial viability of applicants to Aid to Publishers. Since the introduction of the program, financial health of publishers has always been a factor in determining whether a contribution should be made. The previous assessment method was based largely on an applicant's net profit margin and ignored other factors that could serve as an indication of a publisher's financial performance.

The new financial viability approach is fundamentally a rules-based method but also allows for the use of professional judgment informed by recent and reliable information to make decisions in individual cases.



The new system has two stages. First, the financial performance of applicants is assessed against five financial ratios using benchmarks derived from the real-world environment of Canadian publishers. In the second stage, program officers thoroughly examine any applications identified by the financial-ratio analysis as having potential viability issues. As part of this work, officers contact the publishers to obtain the most recent financial information available and news on recent developments. Decisions on viability are then made taking into account the most recent, complete and relevant financial information.

Not only are the decisions on viability more reliable than in the past, the new system also allows more effective monitoring to be done. It is now the practice of the program, for example, to use contribution agreements to monitor the health of a publisher by requiring regular updates of specific financial information.

Publishing Measures

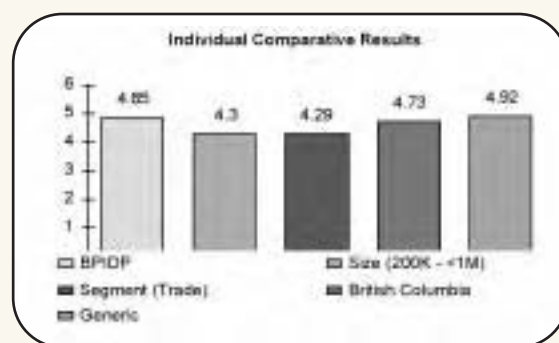
Over the past decade, BPIDP has built Canada's most extensive database of financial information on Canadian-owned book publishing firms. In 2003-04, efforts were made to mine this data and to apply it in the development of a financial performance assessment tool for publishers to aid them in their business planning.

The first result of these efforts was *Publishing Measures*, a financial report tailored to each publisher receiving Aid to Publishers funding. The report shows the results of that firm through the calculation of 14 financial ratios, giving comparative industry benchmarks for each ratio based on company size, market segment, language and – for the report's second version – geographic region. To track a publisher's progress over time, the report has a company's individual results for each ratio for a four-year period.

Publishing Measures is distributed in both printed and PDF versions. To introduce publishers to these reports and to seek their input for future versions, presentations were given in Banff, Toronto and Vancouver to regional publishing associations. In 2004-05, there will be more presentations of the report in other cities across the country.

EXCERPT FROM PUBLISHING MEASURES

Since the publisher-specific information contained in the report is confidential, a hypothetical British Columbia publisher called Generic Publishing was developed for presentation purposes.



This indicator measures profitability. It reflects net profit before income tax as a percentage of total revenue. This chart shows that, in 2003-04, the median profit margin of publishers receiving BPIDP funding was 4.85%. BPIDP publishers with sales between \$200,000 and \$1M, which is the revenue group assigned to Generic Publishing, had a profit margin of 4.3%. Publishers in the program operating in the trade book market segment, as opposed to the education, scholarly or hybrid segments, had a profit margin of 4.29%. BPIDP publishers based in British Columbia had a profit margin of 4.73%. Generic Publishing itself was slightly over the median with a margin of 4.92%.

New Publishers

Ensuring the vitality and continuity of the Canadian book publishing industry is a priority of the Branch. In 2003-04, Aid to Publishers supported more publishers than the previous year, continuing a trend that began in 1996-97. With 220 publishers receiving a contribution in 2003-04, more publishers received funding in the past year than in any other year in BPIDP history.

It was also a record year for new recipients, with the following 14 publishers becoming eligible for Aid to Publishers:

BLUE LAKE BOOKS, BRITISH COLUMBIA

Based in Vancouver, Blue Lake Books publishes literary fiction, poetry and non-fiction from new and established writers. Blue Lake also publishes children's literature under its imprint Hodgepog Books.

CAITLIN PRESS, BRITISH COLUMBIA

The main focus of Caitlin Press is publishing books that reflect the concerns, culture and history of interior British Columbia.

CANADIAN PLAINS RESEARCH CENTER, SASKATCHEWAN

The Canadian Plains Research Center of the University of Regina is Saskatchewan's only university press. The Center publishes books on all aspects of prairie life, including its history, resources, land and people.

COACH HOUSE BOOKS, ONTARIO

Coach House publishes Canadian poetry, fiction, art books and drama. Unlike most publishers, Coach House publishes a substantial portion of its list online as well as in print.

DC BOOKS, QUEBEC

An English-language press based in Montréal, DC Books publishes poetry, fiction, belles lettres and literary anthologies.

2003-04 was the first year that Master Point Press was a BPIDP participant. The BPIDP funding not only provided a welcome boost to cash flow during the Christmas season (always a difficult period for small publishers as printing bills come in, but sales receipts are still distant), but allowed us to undertake some experimental and relatively high-risk projects with new Canadian authors and business partners. Now, as ongoing participants in BPIDP, it is possible to plan for future years with more assurance of financial stability, and to develop and invest in more new publishing ideas.

Ray Lee
President, Master Point Press

MASTER POINT PRESS, ONTARIO

While primarily interested in books on contract bridge, Master Point Press also publishes books on other games and intellectual pursuits.

GROUPE ÉDUCALIVRES INC., QUEBEC

It is the mission of Groupe Éducalivres to play an active role in the education of young Canadians through the production of superior quality teaching materials for the elementary and secondary school markets.

J. GORDON SHILLINGFORD PUBLISHING INC., MANITOBA

J. Gordon Shillingford Publishing works in a variety of genres, including drama, social history, children's literature and poetry, and has five imprints: Scirocco Drama, The Muses' Company, J. Gordon Shillingford, Watson & Dwyer, and Griffin Books.

LES ÉDITIONS LE DAUPHIN BLANC, QUEBEC

Founded in 1991, this Loretteville-based publisher specializes in books on personal development, including novels, with a focus on popular psychology, health and spirituality.

MANOR HOUSE PUBLISHING INC., ONTARIO
Founded in 1998, Manor House publishes
exclusively Canadian works of fiction,
non-fiction and poetry.

FLANKER PRESS,
NEWFOUNDLAND AND LABRADOR
Flanker Press specializes in trade books, with
a focus on content relevant to Newfoundland,
Labrador and other parts of eastern Canada.

SUMACH PRESS INC., ONTARIO
Sumach Press is a women-owned and -operat-
ed publisher of books on issues of concern to
women, with topics ranging from health and
sexuality to history and politics.

THOMAS ALLEN & SON LTD., ONTARIO
The book publishing division of Thomas
Allen & Son was created in 2000 to renew the
original 1916 mandate of the company, which
was to publish entertaining and challenging
fiction and non-fiction.

TRALCO EDUCATIONAL SERVICES INC.,
ONTARIO
Tralco publishes language instruction
textbooks, mostly for French as a Second
Language but also for German, Spanish,
English and Italian.

Ch.05

Aid to Industry and Associations: More Targeted Results

>> Aid to Industry and Associations supports projects that strengthen the infrastructure of the Canadian book industry as a whole. Through collective efforts such as marketing and promotion campaigns, the industry acquires the ability to anticipate and respond to new challenges and opportunities. This component also helps the industry develop strategic tools for better business planning and professional development, and supports critical industry-related research and publishing internships that develop new industry professionals.

Aid to Industry and Associations focuses on projects that respond to a significant market need, are well targeted, and have sound and substantial projected results.

Marketing and Promotion

Book festivals and *salons du livre*

The book festivals and *salons du livre* supported by Aid to Industry and Associations are a cost-effective means for bringing together authors, publishers, booksellers and readers from all over the country to celebrate Canadian books.

The program supported ten *salons du livre* across Canada last year, including *Le salon du livre de Montréal*, which attracted more than 1,000 authors and 120,000 attendees over five days of events. In total, approximately 300,000 people attended salons in 2003-04. The total funding provided by Aid to Industry and Associations to the ten *salons* was approximately \$300,000. That adds up to just one dollar for every person who visited a *salon*, an excellent return on the public support of these invaluable celebrations of Canadian writing.

In 2003-04, Aid to Industry and Associations provided funding to eight book festivals, the largest of which was Word On The Street. Held in five cities across Canada, Word On The Street is a series of free outdoor festivals featuring author readings, hands-on activities for attendees, and publisher booths. Another highly successful venue supported by the program was Montréal's bilingual Blue Metropolis International Literary Festival. In just six years, Blue Metropolis has become a major Canadian literary event. Last year, the festival attracted over 120 writers, including Booker Prize-winning author Yann Martel. Many were writers from Canada's diverse ethnic communities who were teamed up with writers from their country of origin. In total, approximately 350,000 people attended the eight book festivals – with total BPIDP funding of \$360,000.

BPIDP's support has made a substantial difference to the design, content, impact, frequency, awareness and distribution of Canadian Children's Book News. For the first time in its 25-year history, beginning with the Winter 2003 issue, Children's Book News has a full-colour cover. Not only does colour increase the magazine's appeal and impact, it allows us to feature and promote the work of an illustrator, and the book that the illustration was taken from, on the cover of every issue.

Helena Aalto
Interim Executive Director (2002-03),
The Canadian Children's Book Centre

Children's Book News

Although the Canadian children's publishing industry continues to grow, the media space for reviews of children's books continues to shrink. The Canadian Children's Book Centre has sought to fill this market need by transforming the *Children's Book News* from an association newsletter to a glossy consumer magazine featuring book reviews, author and illustrator profiles, and articles and opinion pieces. Since the Centre has a mandate to promote Canadian children's literature, and a history of success delivering on this mandate, it is extremely well positioned to produce a publication of this nature and to properly market it.



SALONS DU LIVRE AND FESTIVALS IN 2003-04

<i>Salons du livre</i>	Attendance	BPIDP Funding
Montréal (Nov 03)	120,000	\$80,000
Québec* (April 03)	47,000	\$50,765
Outaouais (March 04)	33,000	\$37,000
Saguenay (Sep 03)	24,270	\$21,000
Toronto (Oct 03)	13,500	\$27,500
Trois-Rivières* (April 03)	13,000	\$21,677
Côte-Nord* (Feb 04)	11,000	\$15,000
Abitibi (May 03)	8,500	\$18,700
Edmundston* (April 03)	8,500	\$25,000
Rimouski (Oct/Nov 03)	7,007	\$18,000
Festivals	Attendance	BPIDP Funding
Word On The Street (Sept 04)	300,000	\$106,000
Winnipeg International Writers Festival (Sept/Oct 04)	14,000	\$32,000
Vancouver International Writers Festival (Oct 04)	12,000	\$32,000
WordFest: Banff-Calgary International Writers Festival (Oct 04)	12,647	\$75,000
Blue Metropolis International Literary Festival* (April 03)	9,000	\$75,000
<i>Marché francophone de la poésie</i> (May 03)	6,260	\$20,000
<i>Festival international de la littérature</i> (May 03)	7,888	\$30,000
<i>Festival de la littérature de la Montérégie</i> (April 03)	1,913	\$9,500
Total Attendance/Funding	641,597	\$694,142

*Note: These amounts were for more than one financial year.

The improvement and re-targetting of the *Children's Book News* has had numerous short- and long-term benefits for the Canadian book industry, including increased consumer awareness of Canadian children's books and the establishment of a reliable vehicle for reviews of children's books. The Canadian Children's Book Centre works in close collaboration with its French-language counterpart, *Communication Jeunesse*.

Canadian First Book Fairs Inc.

The Canadian in-school book fair market is estimated to be worth \$40M to \$50M per year yet, until recently, there was no significant Canadian company that served the English-language market. Canadian First Book Fairs, a joint venture of four Canadian book publishing firms, was formed to address the need for school fairs that offer greater access to Canadian children's literature. Canadian First Book Fairs carries only Canadian children's books, offering a dynamic selection of the best books available from more than 20 Canadian publishers across the country.

The project has provided an excellent opportunity for Canadian children's book publishers to penetrate a new, direct-to-reader market (and the perfect means for Canadian schools to raise money and expand their libraries at the same time). In the first phases of the project, the book fairs are being held in the British Columbia region only, but the ultimate goal will be to offer the fairs to schools across Canada.

Aboriginal Book Publishers of Canada

In 2003-04, the Aboriginal Book Publishers of Canada (ABPC), with the support of Aid to Industry and Associations, attended two important events for the publishing community: The Congress of the Humanities and the Social Sciences, which took place from May 28 to June 4, 2003, in Halifax, and BookExpo Canada, which was held in Toronto from June 6 to June 9. Attendance at these events

allowed Canada's aboriginal publishers to actively market their books to a number of their key markets, such as booksellers, librarians, academics and wholesalers.

The ABPC again worked with BPIDP to create a collective catalogue that highlights a selection of titles offered by each of its member publishers – Theytus Books, Pemmican Publications, Kegeedonce Press and the Gabriel Dumont Institute. The catalogue was distributed through a targeted mailing and at the industry events attended by the ABPC.



The Giller Prize

Aid to Industry and Associations supported the Giller Prize in 2003-04, the tenth anniversary of this important award. Since it was introduced, the Giller Prize has evolved into one of the most prestigious awards for English-language Canadian fiction, and an increasingly successful event for the promotion of Canadian books and authors.

The Giller Prize has an innovative and well-targeted promotional campaign, involving the participation of prominent Canadian literary figures, booksellers and librarians across the country, and the national media. The campaign culminates in the announcement of the winner at a gala televised event. The Giller has demonstrated its impact on Canadian literature through the increased

sales of short-listed and winning authors. During the last nine years, these books have sold almost two million copies.

In providing new support to this already thriving event, BPIDP helped allow the expansion of the scope of the promotional activities surrounding the Giller. For example, last year, a souvenir book with contributions from authors such as Rohinton Mistry, Austin Clarke, Margaret Atwood and Alice Munro was published to commemorate the prize's tenth anniversary.

Professional Development

Association nationale des éditeurs de livres **Professional Development Program**

Since there are a limited number of colleges and universities in Canada that offer courses in publishing, BPIDP provides funding to associations that set up professional development programs for the industry. Each year, the *Association nationale des éditeurs de livres* (ANEL), with support from Aid to Industry and Associations, organizes a French-language program that offers training in a wide variety of subject areas. This training allows book industry professionals, regardless of their company's size or type, to acquire up-to-date skills and knowledge. The ANEL program also includes workshops and opportunities for overseas work placements.

ANEL conducts annual consultations with the book industry in order to adapt the program to the needs of the industry. In 2003-04, the association added a mentorship component to the program, training sessions at specialized institutions such as Simon Fraser University's Canadian Centre for Studies in Publishing, and the opportunity for publishers to consult with industry specialists.

The Writers' Union of Canada Professional Development Workshops

Many of the members of the Writers' Union of Canada (TWUC) have requested help in

developing business skills, especially in negotiating contracts. In response to this need, TWUC, with the support of Aid to Industry and Associations, created a new project for the Professional Development funding initiative. The project consists of a series of one-day workshops throughout Canada in 2003-04 to assist writers in developing essential business skills.

The workshops show participants how to use the Model Trade Book Contract booklet produced by TWUC and provide the complete contract story, including how to negotiate better contracts by paying particular attention to the deep discount, out of print and electronic rights clauses. The workshops also deal with such diverse issues as the Public Lending Right, provincial programs, copyright and literary agents.

Equipping Canadian writers with these kinds of skills allows them to adopt a more effective approach to their businesses and, in the long term, contributes to the overall strength of this critical part of our book industry.

Business Planning

Launched in 2003-04, this new initiative supports the adoption of strategic business planning by providing Canadian publishers with access to customized advice from experienced industry consultants.

Funding is available for executive training, financial/market consultants, resource management and communication planning. Executive training includes MBA, MA or other higher education courses for managerial level and above, and targeted workshops with company-specific results. The services of a financial/market consultant can be used for projects such as an assessment of the potential of new domestic markets or the creation of a new business model, including pricing models. Resource management includes the reallocation of company resources into a

more cost effective business model and the identification of the sales potential of the publisher's list. Communication planning includes the creation of an internal and external communication plan.

As of March 2004, three projects had been commenced under Business Planning. For example, one project involves the preparation of an investor document that will incorporate the firm's strategic vision plus in-depth financial analysis in a format that will be attractive to potential investors. This investor-relations document will serve to reposition the company and help build important equity.

The program is currently encouraging publishers to submit applications for Business Planning funding (see the Aid to Industry and Associations 2004-05 Application Guide for more details).

Industry Research

School Library Market Analysis

In 2003, Aid to Industry and Associations provided funding to the Association of Canadian Publishers to study the Canadian school library market.

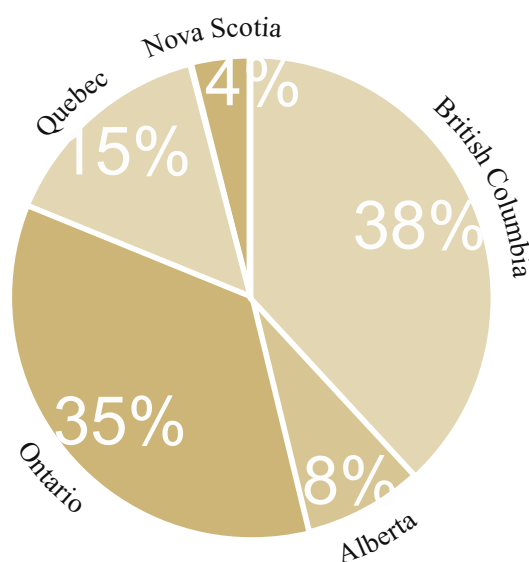
The study provides the Canadian book industry with a better understanding of this important market – its history as well as its potential. The study also gives publishers, librarians and library wholesalers a basis for advocacy efforts to address the funding situation. Strengthening the school library market is not only crucial for literacy and student achievement in Canada, it is also vital to the creation of significant new markets for the Canadian book industry (a PDF version of the study can be downloaded at www.publishers.com/studies-intro.htm).

Publishing Internships

This initiative was created in 2000-01 with the assistance of the Association of Canadian

Publishers and the *Association nationale des éditeurs de livres*, and in consultation with the graduate publishing programs at Simon Fraser University, Centennial College and the *Université de Sherbrooke*. The initiative is designed to help Canadian book publishers, and national and regional associations, develop a pool of new professionals that have the specialized skills and knowledge to succeed in the book industry. Special priority is given to internships involving participants from aboriginal, minority official language or culturally diverse communities.

PARTICIPATING PUBLISHERS BY PROVINCE, SINCE 2000-01



In addition to the in-depth, on-the-job training provided to the interns, the participating publishers and associations gain access to highly motivated individuals who can make a significant contribution to the organization's productivity.

The number of publishing internships supported by Aid to Industry and Associations has grown every year since the pilot project was launched in 2000. To date, seven French-language book publishing firms and 22 English-language firms have taken advantage of the initiative. The results for both publishers and interns have been as remarkable as the

rapid growth of the initiative. Most notable is the fact that approximately 70 percent of interns are offered positions by their publishing firms and 85 percent accept these offers.

And Publishing Internships continues to grow and evolve. Aid to Industry and Associations, with the help of publishers and interns, both current and former, is gathering more data with respect to the initiative in order to make it even more efficient, effective and responsive to industry needs.

In spring 2001, Alire had the good fortune to hire an intern for 32 weeks, with support from the BPIDP publishing internship program. Apart from the fact that we hired our intern full time after this internship and thus created a permanent position in our company, which is still filled three years later, the contribution this additional employee made led to new contracts in his first year with us.

With the help of our intern, who conducted routine marketing activities, we were able to spend more time promoting our collection to Canada's francophone secondary school sector. Thanks to ongoing work since then, we are reaping the rewards of these efforts today and have an ever-growing window of opportunity to promote our products to this sector, a very important market for the book publishing industry.

We believe that creating a permanent job and better positioning for our products with adolescents are two very positive results that could not have been achieved so quickly without the special funding provided by BPIDP.

[translated from French]

Louise Alain
Marketing Director, Les éditions Alire

Ch. 06

Supply Chain Initiative: Building the Foundation

>> Established in 2002, the Supply Chain Initiative component of BPIDP encourages the industry's participation in the strengthening of the supply chain for books in Canada. In providing this support, the program helps the industry to become more efficient, viable and resilient to changing patterns in supply and demand. Ultimately, access to an improved supply chain will ensure the Canadian book industry's continued capacity to invest in the development and promotion of Canadian books and authors.

Support delivered through the Supply Chain Initiative is designed to complement industry-wide initiatives related to the adoption of technologies and practices that will lead to greater communication and distribution efficiencies.

Successful supply chain management is dependent on the adoption by all the participants in the chain of integrated processes based on shared standards and technologies. For this reason, in addition to acting as a financial partner, the program seeks to facilitate a coherent approach to supply chain improvements, funding only those projects that are complementary and serve a common goal endorsed by the industry.

To date, the program has maintained its focus on support for the three priorities that the Canadian book industry has recognized as key to achieving its objectives for supply chain improvements – improved bibliographic data, increased use of electronic trading documents, and access to accurate and timely data on book sales in the Canadian market.

Bibliographic Data

High-quality bibliographic data is a key component to a comprehensive strategy for supply chain improvements in the book industry. Book retailers rely on access to data on the source, availability and price of books for efficient inventory management processes. In addition, a current and accurate database is an essential prerequisite for the implementation of a sales tracking and analysis scheme, another important factor for achieving supply chain improvements. Through the Supply Chain Initiative, BPIDP encourages the development and maintenance of Canada's bibliographic resources through funding to all sectors of the industry for a variety of projects.

In 2003-04, the Supply Chain Initiative provided \$910,000 in funding to 131 Canadian book publishers. Establishing a basic standard

for data quality and comprehensiveness as an eligibility criteria, this funding not only provides publishers with the resources to invest in labour and improvements to their systems, it also encourages their development of high quality data that meets the requirements of key retailers and aggregators operating in Canada.

The program also provided support for the development of PExOD, which is a tool to help Canadian publishers to build databases that comply with the ONIX standard; for improvements to the database of titles of *La Société de gestion de la Banque de titres de langue française*; and for BookNet Canada's efforts with regard to the development of a Canadian bibliographic certification standard and process.

Electronic Communication

Fast and effective communication between trading partners, facilitated by access to a common electronic communications platform, is a key element of the Canadian strategy for book industry supply chain improvements. An increase in the volume of electronic document interchange transactions will result in improved supplier and retailer performance, more informed management decisions, and cost savings for both suppliers and retailers.

In 2003-04, BPIDP invested in projects that contributed to the establishment and adoption of efficient book industry communications networks. This included support for the *Association des distributeurs exclusifs de livres en langue française* in its development and promotion of the NEEDA standard, and for BookNet Canada in its negotiation of an agreement for Pubnet, a wholly owned subsidiary of R. R. Bowker, to provide affordable and efficient Electronic Data Interchange services to suppliers and retailers of all sizes in the Canadian English-language market.

BPIDP also provided support to distributors and wholesalers in both the English and French markets to assist in their adoption of communication and inventory management technologies, as well as some complementary warehouse improvements. In addition, 2004-05 began with the initiation of an important technological enablement project on behalf of members of the *Association des librairies du Québec*, which will result in improved access to electronic ordering processes for Quebec booksellers.

Market Data Analysis

One of the characteristics of an efficient supply chain is visibility: the ability of publishers and retailers to gauge the performance of titles currently on the market. Canada is the only English-language book market that does not have a comprehensive sales tracking and analysis service. The United Kingdom, United States, Ireland, Australia, New Zealand and South Africa all collect data from retail points-of-sale and provide reports and analysis to publishers and booksellers. Market data analysis allows publishers to make more effective printing and reprint decisions, manage marketing budgets more effectively and focus sales efforts. Retailers also have access to bestseller lists that truly represent the diversity of the marketplace in which they operate.

Accurate and comprehensive bibliographic data is a necessary precondition for the implementation of market data analysis and BPIDP will continue to support the industry in its initiatives related to creating better data resources. With the support of the Supply Chain Initiative, BookNet Canada has taken the first steps toward negotiating a contract with a market data analysis provider for Canada.

The most recent funding component offered by Heritage – the Supply Chain Initiative – represents the most significant commitment yet by the federal government to improving the efficiency and therefore viability of book distributors across Canada.

Peter Waldock
President, North 49 Books



**BOOKNET
CANADA**

BOOKNET CANADA

Formed as part of a collaborative initiative on the part of Canadian Heritage and the Canadian book industry, BookNet Canada recently celebrated its first anniversary as a leader in the English-language book industry's move to adopt more efficient supply chain management practices.

In June 2003, the Department of Canadian Heritage announced its partnership with BookNet. This partnership has taken the form of a three-year project that began in April 2003 and through which BPIDP provides support to BookNet's activities in its main priority areas: developing standards for bibliographic data, Electronic Data Interchange, Sales Data Analysis, international standards and the sourcing of other technologies and services to enhance supply-chain efficiencies.

The total BPIDP contribution approved for these priority areas, to be used over the three years, is approximately \$2.5M.



LA SOCIÉTÉ DE GESTION DE LA BANQUE DE TITRES DE LANGUE FRANÇAISE

BPIDP has funded *La Société de gestion de la Banque de titres de langue française* (BTLF) since its inception, providing over \$3M in funding to support the development of a bibliographic database of books published in French in Canada. The BTLF's database is a reference and management tool used by booksellers and librarians, providing access to over 550,000 French-language titles.

In March 2004, the BTLF marked an important step in improving the availability of bibliographic tools for the French-Canadian book market. The BTLF and Electre, a book industry organization based in France, concluded a partnership agreement for the creation of a joint bibliographic product based on the information in their respective databases. This product will be provided exclusively to the North American market. Electre, whose objectives include listing all the titles published in French in 76 countries and those published in France in any language, will also distribute records of Canadian French-language books from the BTLF database to its clientele.

While we would have had to replace our system anyway, we could have neither justified nor afforded such a quantum leap without BPIDP assistance. Comparing what we now have compared to what we otherwise might is the systems equivalent to the difference between a Volvo and a Model T Ford.

Nicholas Hoare
President, Nicholas Hoare Ltd.

Ch. 07

Industry Development

>> The Branch's Industry Development Directorate was created, in part, to focus on long-term challenges facing the Canadian book industry, and to develop innovative solutions to meet future change.

Ownership Succession

In 2003-04, the Directorate undertook a significant amount of research into the succession-related needs of book publishers. Building on the expertise of the joint industry/government Finance and Succession Committee, the Directorate funded an online survey of book publishers and completed research on this issue. The Directorate examined the current scope of succession-related challenges and inventoried resources available to publishers in support of succession planning. Approximately fifty percent of all shareholders anticipate retiring in the next ten years. The majority of publishers (sixty-four percent) do not have a plan for their succession.

The Directorate recognizes the importance of providing Canadian publishers with the tools required to successfully plan for succession. In the short term, the Directorate will be developing, in collaboration with the industry, a series of instruments that will assist publishers in the pursuit of succession-related activities, including how to determine the value of a publishing company and how to prepare a company for sale.

The Directorate's examination of this issue also indicates that a wealth of resources is available to assist succession planning in non-cultural industries, many of which can be adapted, over the long term, for the book publishing industry.

Small and Medium-sized Cultural Enterprises

In order to develop a more thorough understanding of the role small and medium-sized enterprises (SMEs) operating in the cultural sector play, the Department of Canadian Heritage undertook a wide-ranging study of cultural SMEs in 2003-04. In addition to collecting comparable data on different cultural industries, including book publishing,

the study examined issues shared by the various industries.

Fifty-four book publishers responded to an online survey covering topics such as financing, human resources, executive development and product development. For the purposes of the study, a SME was defined as having fewer than 300 employees and less than \$25M in revenue. According to the preliminary findings of the study:

- >> 53% of book publishing SMEs are more than 20 years old;
- >> just under half have fewer than five employees, 20% have 20 or more;
- >> in 2002, 51% had less than \$500,000 in revenue, 19% had revenue greater than \$5 million;
- >> 31% reported zero employee turnover during the last two years;
- >> about half reported that they found it difficult to find well-trained employees, 19% spent nothing on employee training;
- >> 44% believe their company has a shortage of management expertise; of these, 35% are providing formal training, 41% are looking outside their company to fill gaps and 47% indicate they are doing something other than formal training or recruiting, such as mentoring;
- >> 48% used some form of external private financing, 83% of those who applied for loans or lines of credit were approved;
- >> 86% earned revenues from sales outside of Canada; for 58% of these, sales outside of Canada accounted for less than 10% of total company revenues.

The Department continues to look for opportunities where different cultural sectors can

work together to meet common challenges. The Directorate's efforts with respect to the needs of the Canadian book industry's small and medium-sized enterprises will continue to be influenced by the report's findings.

Publisher Access to Financing

Access to financing is a major challenge for the cultural industries. The recent Canadian Heritage study of cultural SMEs gathered information related to the experiences of book publishers in obtaining financing. The study revealed that approximately 83% of publishers who applied for a line of credit or loan had that request approved. However, only half of all publishers surveyed made the initial application. Given that anecdotal evidence from publishers suggests there is a difficulty in receiving financing, further examination of this issue is required. In the coming year, the Directorate will further investigate approaches to dealing with the need for affordable working capital for Canadian publishers.

Human Resources and Executive Development

According to the SME study, among Canadian publishers, domestic sales development, business planning, financial and accounting management, and leadership are identified as the most important managerial skills. Forty-four percent of publishers surveyed felt their firms had deficiencies in these areas, and were using a variety of means including training and outside recruitment to fill these gaps. In 2004-05, the Directorate will be working with BPIDP to examine the executive development-related needs of publishers.

Ch. 08

Canadian Books Abroad

>> International marketing for Canadian books and global promotion of Canadian writing are priorities of the Publishing Policy and Programs Branch. Marketing and promotion of this scope not only helps build a stronger and more resilient book industry, it provides invaluable opportunities to recognize and celebrate the many international successes of Canadian literature.

Support for international marketing of Canadian books is delivered through funding from BPIDP's International Marketing Assistance component, in tandem with the logistical and promotional assistance and market intelligence provided to Canadian publishers by the Association for the Export of Canadian Books.

Publishing Policy and Programs also helps develop special projects and initiatives that raise the profile of Canadian writing around the world, such as the Canadian presence at last year's Turin International Book Fair.

International Marketing

The Association for the Export of Canadian Books is a non-profit organization that helps Canadian book publishers develop foreign markets and promote export sales of their books, providing market intelligence as well as direct financial assistance. In 2003-04, the AECB partnered with BPIDP for an eighteenth consecutive year, with BPIDP support in the amount of \$4.8M, representing 81% of the association's revenues.

Funding

In 2003-04, over 85% of BPIDP's contribution to the AECB was allocated directly to Canadian publishers through the four funding areas of the International Marketing Assistance component. A total of 145 Canadian publishers benefited from \$4.1M in financial assistance through the Export Marketing Assistance Program, New Market Development Fund, Export Expertise Development Fund and Foreign Rights Marketing Assistance Program.

Market Intelligence and Professional Development

The AECB's market intelligence and professional development activities are value-added services that help Canadian publishers get a competitive edge in export markets. In 2003-04, the AECB commissioned more market guides

for Canadian book exporters on the United States, the United Kingdom, France, China, Japan and Korea. The AECB also conducted seminars on the US, UK and French markets.

Expanding Canadian Publishers' International Markets

The AECB produced a number of effective promotional tools, including catalogues and a website, specifically geared to export markets. Combined, the AECB's catalogues reached more than 15,000 international addresses. Very positive results were achieved through:

- >> The distribution of the 2004 *Books on Canada* and fall and spring issues of *Rights Canada*.
- >> The publication of two US library catalogues, which were mailed to 8,500 US librarians in preparation for the American Library Association trade show in Toronto in June 2003.
- >> The publication of three trade catalogues and touring collections to showcase excellence in Canadian publishing at over 40 venues around the world.

In May 2003, the AECB launched its redesigned website. International publishers and agents now have access to a searchable database of over 2,200 Canadian titles with over 275 publishers' email and website links.

Logistical Support to Canadian Publishers

In 2003-04, the AECB coordinated the Canada pavilion at five major international book fairs: the Bologna Children's Book Fair, BookExpo America in Los Angeles, the Frankfurt Book Fair, the Guadalajara International Book Fair and the London Book Fair. The AECB also had a booth at the American Library Association convention held in Toronto.

For more information about AECB programs and services, visit www.aecb.org.

Global Promotion of Canadian Writing

Turin International Book Fair

In 2003, the Turin International Book Fair, the second largest public book fair in Europe, invited Canada to be the guest-of-honour nation. More than 20 Canadian authors attended the event, including Yann Martel, John Ralston Saul, Alistair MacLeod, and Gaetan Soucy. The Canadian presence at the fair was a collaborative effort between the Departments of Canadian Heritage and Foreign Affairs and International Trade, the AECB, the Canada Council for the Arts and our book publishing industry.

Canadian Heritage, through Publishing Policy and Programs, provided funds to selected Canadian writers and publishers to offset their travel costs to Turin. The Branch also helped coordinate the Canadian booth at the fair,

organize author and media activities, and arrange a series of panel discussions between Canadian and Italian publishers.

The fair was a triumph for Canadian writers and books. With more than 200 articles in national and regional newspapers, and features on Italian and European television and radio, Canada experienced unprecedented and positive media attention in Italy.

Belgrade International Book Fair

In October 2003, Canada was the Belgrade International Book Fair's guest-of-honour nation. Publishing Policy and Program's contribution to the Canada presence at the fair included author support, field staff, books and technical support.

Media coverage of the Canada booth was extraordinary. There were more than 70 newspaper articles on Canadian literature and on



TOP ROW: TURIN INTERNATIONAL BOOK FAIR, BOTTOM ROW: BELGRADE INTERNATIONAL BOOK FAIR

the Canadian publishing sector, plus numerous radio and TV interviews with Canadian representatives at the fair.

Canadian Forum on Cultural Enterprise

In January 2004, the Canadian Forum on Cultural Enterprise took place in Paris, France. This event was the first of its kind. Over the course of three days, more than 25 workshops in every cultural field were offered. There were also discussions moderated by experts in different cultural fields and numerous meetings between different firms.

Publishing Policy and Programs provided support to the Forum's organizer, Canadian Heritage's Trade Routes Program. The Branch helped prepare workshop reports, ensured that the 14 participating Canadian publishers were well supported throughout the event, and provided feedback about the organization, execution and objectives of the Trade Routes Program. Although a limited number of publishing houses participated in the Forum, the many meetings the publishers took part in were very productive.

EXPORTS OF CANADIAN PUBLISHERS AND EXCLUSIVE AGENTS, 2000-01



*Note: These figures typically do not include foreign rights sales made by literary agents, who are playing an increasingly important role in the export of Canadian writing.

Forward

>> Since the Book Publishing Industry Development Program was created twenty-five years ago, the Canadian book industry has developed into one of our most successful cultural industries.

The dynamic growth in Canadian publishing, the diversity and quality of our books, and the frequent national and international successes of Canadian literature are each testament to the vitality of our authors and publishers. In addition to this talent and dedication, we believe BPIDP's support of the Canadian book industry has been a key factor in the industry's remarkable success, and that we should be very proud of what we have accomplished together over the past quarter century.

For the coming year, Publishing Policy and Programs will focus on a wide range of issues and initiatives essential to the continuing growth of the industry. The Branch's priorities for 2004-05 include the

government-wide expenditure review; additional streamlining of BPIDP application processing; the development of a strategy for small and medium-sized cultural enterprises; a collaborative approach for promoting Canadian literature in international markets; and advancing the book supply chain in Quebec.

While our book industry still faces many challenges, with the strength of our writers, publishers, booksellers and other key partners – and the desire of Canadians everywhere to read our own stories – we can help ensure the success of Canadian writing for many years, and many books, to come.

Gordon Platt
Director General, Publishing Policy and Programs

Annie Carruthers
Director, Book Publishing Policy and Programs

Nadia Laham
Director, Industry Development Directorate

Doris Boivin
Manager, Aid to Publishers

Carl McMullin
Manager, Aid to Industry and Associations

Dennis Price
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Publishing Policy and Programs
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This report was prepared by John Graham and Manon Allie, Publishing Policy and Programs.

The Numbers

Aid to Publishers

Statistical Overview

	1999-00	2000-01	2001-02	2002-03	2003-04
Number of Book Publishers – Total					
French-Language Book Publishers	103	105	105	104	102
English-Language Book Publishers	110	108	112	113	118
Number of New Titles Published – Total					
French-Language Book Publishers	3,303	3,368	3,446	3,856	3,889
English-Language Book Publishers	2,240	2,340	2,428	2,421	2,375
Sales of Canadian-Authored Titles					
Total (in millions of dollars)	\$273	\$260	\$281	\$288	\$281
French-Language Book Publishers	\$146	\$130	\$137	\$144	\$146
English-Language Book Publishers	\$128	\$131	\$144	\$144	\$134
Publishing Revenue					
Total (in millions of dollars)	\$362	\$369	\$388	\$410	\$416
French-Language Book Publishers	\$193	\$191	\$199	\$203	\$224
English-Language Book Publishers	\$169	\$178	\$190	\$208	\$192
Total Revenue					
Total (in millions of dollars)	\$618	\$627	\$615	\$635	\$671
French-Language Book Publishers	\$263	\$258	\$267	\$280	\$304
English-Language Book Publishers	\$356	\$369	\$348	\$355	\$367
Sales of Canadian-Authored Titles as a % of Total Revenue					
Titles as a % of Total Revenue	44.2%	41.6%	45.6%	45.4%	41.9%
Profit Margin (Median)					
Profit Margin (Median)	2.9%	4.0%	2.3%	2.9%	4.8%
Number of Publishers per Total Revenue Category					
Less than \$200,000	24	22	26	23	22
\$200,000 to \$999,999	94	101	104	98	101
\$1 million to \$499,999	67	60	56	65	62
\$5 million and greater	28	30	31	31	35
Publishers and Contributions per Region in 2003-04					
	Publishers	% of Total	\$ Millions	% of Total	
British Columbia	25	11.4%	\$2.3	8.9%	
Prairies and North	25	11.4%	\$2.2	8.3%	
Ontario	61	27.7%	\$7.3	28.0%	
Quebec	100	45.5%	\$13.6	52.3%	
Atlantic	9	4.1%	\$0.7	2.6%	
TOTAL	220	100.0%	\$26.1	100.0%	

Aid to Publishers and Supply Chain Initiative for Book Publishers

Funding 2003-04

Publisher	Language	Province	Aid to Publishers Contribution	Supply Chain Contribution
Alliégé ditteur	F	QC	\$ 15,646	\$ 5,000
Altitude Publishing Group of Companies	E	AB	\$ 130,308	\$ 10,000
Annick Press Ltd.	E	ON	\$ 237,031	—
Anvil Press	E	BC	\$ 5,986	\$ 5,000
Apple Press Publishing Limited	E	ON	\$ 18,768	—
Aquila Communications Inc.	E	QC	\$ 52,873	—
Arsenal Pulp Press Ltd.	E	BC	\$ 78,924	\$ 7,500
Art Global Inc.	F	QC	\$ 67,734	—
Bayeux Arts Inc.	E	AB	\$ 21,207	—
Beach Holme Publishers Limited	E	BC	\$ 21,861	\$ 5,000
Between the Lines Incorporated	E	ON	\$ 50,709	—
Bibliothèque québécoise inc.	F	QC	\$ 63,416	\$ 5,000
Blue Lake Books	E	BC	\$ 966	—
Borealis Press Limited	E	ON	\$ 40,027	\$ 5,000
Bouton D'or Acadie	F	NB	\$ 7,659	\$ 5,000
Breakwater Books Limited	E	NF	\$ 123,511	—
Breton Books	E	NS	\$ 25,542	\$ 5,000
Brick Books	E	ON	\$ 6,158	\$ 5,000
Broadview Press Inc.	E	AB	\$ 191,412	\$ 10,000
Broquet Inc.	F	QC	\$ 128,480	—
Caitlin Press Inc.	E	BC	\$ 12,098	\$ 5,000
Canadian Plains Research Center Publishing	E	SK	\$ 43,841	—
Canadian Scholars' Press Inc.	E	ON	\$ 85,021	\$ 7,500
Captus Press Inc.	E	ON	\$ 97,136	\$ 7,500
CCI Learning Solutions Inc.	E	BC	\$ 160,631	—
Coach House Books Inc.	E	ON	\$ 34,015	\$ 5,000
Collectors Guide Publishing Inc.	E	ON	\$ 90,290	—
Cormorant Books Inc.	E	ON	\$ 32,758	\$ 5,000
Corporation des éditions Fides	F	QC	\$ 228,183	—
Coteau Books	E	SK	\$ 69,630	\$ 5,000
Crabtree Publishing Company Limited	E	ON	\$ 480,549	—
DC Books	E	QC	\$ 2,403	\$ 5,000
Décarie ditteur inc.	F	QC	\$ 75,108	\$ 5,000
Detselig Enterprises Ltd.	E	AB	\$ 44,360	\$ 5,000
Douglas & McIntyre Ltd.	E	BC	\$ 537,524	\$ 10,000
Dundurn Press Limited	E	ON	\$ 117,931	\$ 10,000
ECW Press Ltd.	E	ON	\$ 152,895	\$ 10,000
Édimag inc.	F	QC	\$ 76,440	—
Éditions ADA inc.	F	QC	\$ 16,472	—
Éditions Alexandre Stanké inc.	F	QC	\$ 6,095	—
Éditions Anne Sigier inc.	F	QC	\$ 44,973	—
Éditions Banjo inc.	F	QC	\$ 56,782	—
Éditions Berger A.C. inc.	F	QC	\$ 25,578	\$ 5,000
Éditions Brault et Bouthillier inc.	F	QC	\$ 175,744	—
Éditions de la paix enr.	F	QC	\$ 13,648	\$ 5,000
Éditions de Mortagne	F	QC	\$ 95,293	—
Éditions du phare inc.	F	QC	\$ 97,879	—
Éditions Hurtubise HMH ltée	F	QC	\$ 267,804	\$ 10,000
Éditions l'Artichaut inc.	F	QC	\$ 83,561	—

Publisher	Language	Province	Aid to Publishers Contribution	Supply Chain Contribution
Éditions les herbes rouges	F	QC	\$ 6,908	\$ 5,000
Éditions Marie-France ltée	F	QC	\$ 116,331	\$ 10,000
Éditions Médiaspaul	F	QC	\$ 68,195	\$ 7,500
Éditions Michel Quintin inc.	F	QC	\$ 91,224	\$ 7,500
Éditions Phidal inc.	F	QC	\$ 299,700	—
Éditions Pierre Tisseyre inc.	F	QC	\$ 80,509	—
Éditions Prise de Parole	F	ON	\$ 18,042	\$ 5,000
Éditions Quebecor Média inc.	F	QC	\$ 443,825	—
Éditions sciences et culture inc.	F	QC	\$ 92,241	\$ 10,000
Éditions Tormont inc.	F	QC	\$ 605,287	—
Emond Montgomery Publications Limited	E	ON	\$ 157,859	\$ 10,000
Fernwood Publishing Co. Limited	E	NS	\$ 53,619	—
Fifth House Ltd.	E	AB	\$ 114,194	—
Firefly Books Ltd.	E	ON	\$ 600,401	\$ 10,000
Fitzhenry & Whiteside Limited	E	ON	\$ 192,618	\$ 10,000
Flanker Press Ltd.	E	NF	\$ 78,842	\$ 7,500
Formac Publishing Company Limited	E	NS	\$ 103,161	\$ 7,500
Gaëtan Morin éditeur ltée.	F	QC	\$ 353,705	\$ 10,000
Garamond Press Ltd.	E	ON	\$ 32,454	\$ 5,000
Goose Lane Editions Ltd.	E	NB	\$ 89,503	\$ 7,500
Great Plains Publications Ltd.	E	MB	\$ 32,312	—
Groupe Beauchemin, éditeur ltée.	F	QC	\$ 371,355	—
Groupe Educalivres inc.	F	QC	\$ 522,679	—
Groupe Ville-Marie littérature inc.	F	QC	\$ 137,317	—
Guérin, éditeur ltée.	F	QC	\$ 272,569	\$ 10,000
Guernica Editions Inc.	E	ON	\$ 30,569	\$ 5,000
Guides de voyage Ulysse inc.	F	QC	\$ 115,376	\$ 10,000
Guy Saint-Jean éditeur inc.	F	QC	\$ 86,034	\$ 7,500
Hancock House Publishers Ltd.	E	BC	\$ 77,900	—
Harbour Publishing Co. Ltd.	E	BC	\$ 117,904	\$ 10,000
Heritage House Publishing Co. Ltd.	E	BC	\$ 88,077	\$ 7,500
House of Anansi Press Inc.	E	ON	\$ 79,361	\$ 5,000
Hyperion Press Limited	E	MB	\$ 63,087	—
Insomniac Press Ltd.	E	ON	\$ 64,251	\$ 5,000
International Self-Counsel Press Ltd.	E	BC	\$ 197,823	\$ 10,000
Irwin Law Inc.	E	ON	\$ 79,581	—
J. Gordon Shillingford Publishing Inc.	E	MB	\$ 18,878	—
James Lorimer & Company Limited	E	ON	\$ 85,355	\$ 7,500
Key Porter Books Limited	E	ON	\$ 421,155	\$ 10,000
Kids Can Press Ltd.	E	ON	\$ 796,286	\$ 10,000
Lanctôt Éditeur Inc.	F	QC	\$ 58,956	\$ 5,000
Le boéal express ltée	F	QC	\$ 388,343	\$ 10,000
Le Loup de Gouttière inc.	F	QC	\$ 23,563	\$ 5,000
Lemac Éditeur Inc.	F	QC	\$ 142,391	—
Les Écrits des Forges Inc.	F	QC	\$ 32,314	\$ 5,000
Les Éditions Alire Inc.	F	QC	\$ 72,347	—
Les Éditions chouette (1987) Inc.	F	QC	\$ 474,080	\$ 10,000
Les Éditions coopératives Albert St-Martin de Montréal	F	QC	\$ 48,439	\$ 5,000
Les Éditions de la Chenelière inc.	F	QC	\$ 850,000	\$ 10,000
Les Éditions de la courteschelle inc.	F	QC	\$ 157,850	\$ 10,000
Les Éditions de la fondation de l'entrepreneurship	F	QC	\$ 57,761	—
Les Éditions de la pleine lune	F	QC	\$ 10,059	\$ 5,000
Les Éditions de l'instant même inc.	F	QC	\$ 24,150	\$ 5,000

Publisher	Language	Province	Aid to Publishers Contribution	Supply Chain Contribution
Les Éditions d'enseignement religieux F.P.R. inc.	F	QC	\$ 75,723	\$ 5,000
Les Éditions des Intouchables inc.	F	QC	\$ 123,736	\$ 10,000
Les Éditions des Plaines	F	MB	\$ 38,588	\$ 5,000
Les Éditions du Nordir (1996) inc.	F	ON	\$ 8,009	—
Les Éditions du remue-ménage inc.	F	QC	\$ 23,700	\$ 5,000
Les Éditions du Septentrion Inc.	F	QC	\$ 84,581	\$ 7,500
Les Éditions du Vermillon Inc.	F	ON	\$ 15,089	\$ 5,000
Les Éditions Duval inc.	E	AB	\$ 200,296	—
Les Éditions Écosociété	F	QC	\$ 36,751	\$ 5,000
Les Éditions Gid Inc.	F	QC	\$ 39,826	—
Les Éditions Héritage Inc.	F	QC	\$ 181,756	\$ 10,000
Les Éditions J.C.L. Inc.	F	QC	\$ 91,488	\$ 7,500
Les Éditions La Pensée Inc.	F	QC	\$ 91,993	—
Les Éditions le Dauphin Blanc inc.	F	QC	\$ 48,151	—
Les Éditions Liber inc.	F	QC	\$ 13,288	\$ 5,000
Les Éditions Libre Expression L'éc	F	QC	\$ 180,210	—
Les Éditions l'Interligne Inc.	F	ON	\$ 7,459	\$ 5,000
Les Éditions Mille-Îles inc.	F	QC	\$ 73,216	\$ 5,000
Les Éditions MultiMondes Inc.	F	QC	\$ 45,283	\$ 5,000
Les Éditions Nota Bene inc.	F	QC	\$ 21,037	—
Les Éditions Nouvelles	F	QC	\$ 43,466	\$ 5,000
Les Éditions Novalis Inc.	F	QC	\$ 314,647	—
Les Éditions Québec-Amérique Inc.	F	QC	\$ 476,000	\$ 10,000
Les Éditions Reynald Goulet Inc.	F	QC	\$ 155,251	—
Les Éditions Septembre Inc.	F	QC	\$ 97,586	—
Les Éditions Thémis inc.	F	QC	\$ 61,101	—
Les Éditions transcontinental inc.	F	QC	\$ 95,676	\$ 7,500
Les Éditions Triptyque Inc.	F	QC	\$ 33,200	—
Les Éditions Trois-Pistoles	F	QC	\$ 26,277	\$ 5,000
Les Éditions TVA inc.	F	QC	\$ 81,097	—
Les Éditions Un monde différent L'éc	F	QC	\$ 54,393	—
Les Éditions Vents d'Ouest (1993) Inc.	F	QC	\$ 19,977	\$ 5,000
Les Éditions Yvon Blais Inc.	F	QC	\$ 329,536	—
Les Presses de l'Université de Montréal	F	QC	\$ 153,944	\$ 10,000
Les Presses de l'Université d'Ottawa	F	ON	\$ 20,649	—
Les Presses de l'Université Laval	F	QC	\$ 137,982	—
Les Publications Graficor (1989) Inc.	F	QC	\$ 314,579	\$ 10,000
Les Publications Modus Vivendi Inc.	F	QC	\$ 80,138	—
Librairie Raffin (1990) Inc.	F	QC	\$ 41,490	—
Lidec Inc.	F	QC	\$ 260,571	\$ 10,000
Lingo Media Inc.	E	ON	\$ 125,865	—
Lobster Press Limited	E	QC	\$ 42,200	—
Lone Pine Media Productions Ltd.	E	AB	\$ 401,593	\$ 10,000
Louise Courteau éditrice inc.	F	QC	\$ 60,700	\$ 5,000
Loze-Dion éditeur inc.	F	QC	\$ 24,093	—
Manor House Publishing Inc.	E	ON	\$ 8,556	—
Maple Tree Press Inc.	E	ON	\$ 107,057	\$ 7,500
Marcel Didier Inc.	F	QC	\$ 66,361	\$ 5,000
Master Point Press	E	ON	\$ 33,278	—
McArthur & Company Publishing Limited	E	ON	\$ 161,144	\$ 10,000
McClelland & Stewart Ltd.	E	ON	\$ 685,429	\$ 10,000
McGill-Queen's University Press	E	QC	\$ 198,482	\$ 10,000
Mediscript Communications Inc.	E	ON	\$ 41,168	—
Modulo Éditeur Inc.	F	QC	\$ 279,955	—

Publisher	Language	Province	Aid to Publishers Contribution	Supply Chain Contribution
Modulo-Griffon inc.	F	QC	\$ 106,940	—
Mondia �diteurs inc.	F	QC	\$ 115,838	—
Mosaic Press	E	ON	\$ 45,889	—
Natural Heritage/Natural History Inc.	E	ON	\$ 38,899	\$ 5,000
New Society Publishers Ltd.	E	BC	\$ 70,965	\$ 5,000
New Star Books Ltd.	E	BC	\$ 11,803	\$ 5,000
NeWest Publishers Ltd.	E	AB	\$ 31,279	\$ 5,000
Nimbus Publishing Limited	E	NS	\$ 153,121	\$ 10,000
Oberon Press	E	ON	\$ 22,874	\$ 5,000
Oolichan Books	E	BC	\$ 11,391	—
Orca Book Publishers Ltd.	E	BC	\$ 114,706	\$ 10,000
Pacific Edge Publishing Ltd.	E	BC	\$ 34,406	—
Pembroke Publishers Limited	E	ON	\$ 78,896	\$ 7,500
Pemmican Publications Incorporated	E	MB	\$ 28,313	—
Penumbra Press	E	ON	\$ 35,933	—
Pippin Publishing Corporation	E	ON	\$ 21,903	—
Porcupine's Quill Inc.	E	ON	\$ 22,883	\$ 5,000
Portage & Main Press Ltd.	E	MB	\$ 106,878	—
Pottersfield Press Limited	E	NS	\$ 37,327	\$ 5,000
Presses de l'universit� du Qu�bec	F	QC	\$ 115,299	\$ 10,000
Presses inter-universitaires inc.	F	QC	\$ 24,125	\$ 5,000
Productions jeux de mots inc./				
WordPlay Productions Inc.	F	QC	\$ 28,792	\$ 5,000
Rainbow Horizons Publishing Inc.	E	SK	\$ 56,213	—
Raincoast Book Distribution Ltd.	E	BC	\$ 119,029	\$ 10,000
Red Deer Press Ltd.	E	AB	\$ 73,624	\$ 5,000
Robert Rose Inc.	E	ON	\$ 305,759	\$ 10,000
Rocky Mountain Books Ltd.	E	AB	\$ 77,942	\$ 5,000
Ronsdale Press	E	BC	\$ 13,884	\$ 5,000
Sara Jordan Publishing	E	ON	\$ 46,782	\$ 5,000
Second Story Feminist Press Inc.	E	ON	\$ 73,903	\$ 5,000
Septembre �diteur S.E.N.C.	F	QC	\$ 114,380	—
Sogides Lt�e	F	QC	\$ 657,870	—
Sono Nis Press	E	BC	\$ 37,562	—
Souli�res �diteur, inc.	F	QC	\$ 53,194	—
Sumach Press Inc.	E	ON	\$ 24,997	—
Talon Books Ltd.	E	BC	\$ 72,963	\$ 5,000
The Boston Mills Press Inc.	E	ON	\$ 101,994	\$ 7,500
The Frederick Harris Music Co., Limited	E	ON	\$ 249,918	—
The Gateway to Knowledge Inc.	E	ON	\$ 92,721	\$ 7,500
The Mercury Press Publishers Inc.	E	ON	\$ 3,908	\$ 5,000
The Solski Group Ltd.	E	ON	\$ 120,162	—
Theytus Books Ltd.	E	BC	\$ 21,969	—
Thistledown Press Limited	E	SK	\$ 26,741	\$ 5,000
Thomas Allen & Son Ltd.	E	ON	\$ 90,760	—
Thompson Educational Publishing Inc.	E	ON	\$ 74,095	\$ 5,000
TouchWood Editions Ltd.	E	BC	\$ 28,537	\$ 5,000
Tralco Educational Services Inc.	E	ON	\$ 11,158	\$ 5,000
Trifolium Books Inc.	E	ON	\$ 8,317	—
Tundra Inc.	E	ON	\$ 164,571	\$ 10,000
Turnstone Press Limited	E	MB	\$ 18,185	\$ 5,000
University of Alberta Press	E	AB	\$ 75,402	\$ 5,000
University of British Columbia Press	E	BC	\$ 123,778	\$ 10,000
University of Calgary Press	E	AB	\$ 46,533	\$ 5,000

Publisher	Language	Province	Aid to Publishers Contribution	Supply Chain Contribution
University of Manitoba Press	E	MB	\$ 22,323	—
University of Toronto Press Incorporated	E	ON	\$ 272,934	\$ 10,000
Vanwell Publishing Limited	E	ON	\$ 45,182	\$ 5,000
Vehicule Press	E	QC	\$ 27,625	\$ 5,000
Warwick Publishing Inc.	E	ON	\$ 72,739	\$ 5,000
Weigl Educational Publishers Limited	E	AB	\$ 220,800	\$ 10,000
Whitecap Books Ltd.	E	BC	\$ 285,100	—
Wilfrid Laurier University Press	E	ON	\$ 56,368	\$ 5,000
Wilson & Lafleur Ltée	F	QC	\$ 153,917	\$ 10,000
Wood Lake Books Inc.	E	BC	\$ 75,553	—
XYZ éditeur	F	QC	\$ 57,346	\$ 5,000
TOTAL			220 publishers \$ 26,078,419	131 publishers \$ 910,000

Aid to Industry and Associations

Funding 2003-04

MARKETING & PROMOTION

Client	Project	Contribution
Aboriginal Book Publishers of Canada	Marketing	\$ 13,313
Association des auteurs et auteurs de l'Ontario français	15e anniversaire	\$ 11,750
Association des auteurs de la Montérégie	Grands Prix du livre	\$ 7,200
Association des auteurs des Laurentides	Livres, Littératures, Laurentides	\$ 5,000
Association nationale des éditeurs de livres	Journée Mondiale du livre (02/03-03/04)	\$ 51,293
Association nationale des éditeurs de livres	Journée Mondiale du livre (03/04-04/05)	\$ 30,000
Association of Book Publishers of British Columbia	Library Book Purchase Plan (2002)	\$ 1,814
Association of Book Publishers of British Columbia	Read BC: Tourism Catalogue	\$ 3,536
Association of Book Publishers of British Columbia	Marketing and Promotion	\$ 9,337
Association of Book Publishers of British Columbia	Library Book Purchase Plan (2003)	\$ 26,450
Association of Canadian Publishers	Books in Schools	\$ 36,110
Association of Canadian Publishers	Digital Media List	\$ 8,953
Association of Canadian Publishers	Website Upgrade	\$ 19,459
Association of Canadian Publishers	Salon du livre de Montréal (collective booth)	\$ 6,613
Association of English-language Publishers of Quebec	Montreal Review of Books	\$ 15,938
Association of Manitoba Book Publishers	Book Expo 2003	\$ 264
Association of Manitoba Book Publishers	Book Expo 2004	\$ 4,793
Association of Manitoba Book Publishers	Prairie Books NOW	\$ 17,993
Association québécoise des salons du livre	Outils de promotion et de commercialisation	\$ 15,410
Atlantic Publishers Marketing Association	Atlantic Books Today	\$ 92,808
Atlantic Publishers Marketing Association	Atlantic Scene	\$ 4,798
Atlantic Publishers Marketing Association	Books for the Summer	\$ 30,630
Atlantic Publishers Marketing Association	Holiday Books	\$ 35,125
Blue Metropolis Foundation	Traduction en direct	\$ 14,813
Blue Metropolis Foundation	Festival 2004	\$ 48,750
Book and Periodical Council	Book Summit 2003	\$ 15,000
Book Publishers Association of Alberta	Book Expo 2003	\$ 600
Book Publishers Association of Alberta	Best of the West 2003	\$ 24,000
Book Publishers Association of Alberta	Book Expo 2004	\$ 5,743
Canadian Children's Book Centre	Canadian Children's Book News	\$ 11,639
Canadian First Book Fairs Inc.	Canadian First Book Fairs	\$ 39,848
Canadian Publishers' Council	Get Caught Reading	\$ 20,000
CARIAD	Marketing	\$ 35,775
Carrefour de la littérature, des arts et de la culture (Mont-Joli)	Marketing	\$ 5,000
Fourwest Scholarly Book Marketing Consortium	Marketing	\$ 19,343
Giller Foundation	2003 Giller Prize - 10th Anniversary	\$ 75,000
Le Libraire – Réalisations Denis Lebrun	Périodicité du journal Le Libraire	\$ 20,942
League of Canadian Poets	Marketing	\$ 37,749
League of Canadian Poets	National Poetry Month	\$ 25,265
Literary Arts Festival – Victoria	Festival	\$ 6,046
Literary Press Group of Canada	Sales and Marketing Initiative	\$ 234,108
Livre d'ici (Société de promotion du livre)	Internet (papier presse)	\$ 31,601
Livre d'ici (Société de promotion du livre)	Annuaire de l'édition au Québec et au Canada français	\$ 15,520
Maison de la poésie	Marché de la poésie	\$ 20,000
Newfoundland & Labrador Publishers Marketing Association	Summer Brochure	\$ 4,340

Pacific Bookworld News Society	Information Bank	\$ 22,000
Quill & Quire	Website	\$ 47,250
Regroupement des éditeurs canadiens-français	Livres, Disques, Etc.	\$ 63,600
Regroupement des éditeurs canadiens-français	Commercialisation et promotion	\$ 111,700
Salon du livre de la Côte-Nord	Salon du livre	\$ 13,500
Salon du livre de l'Abitibi-Témiscamingue	Salon du livre, 27 ^e édition	\$ 18,701
Salon du livre de l'Outaouais	Salon du livre, 25 ^e édition	\$ 37,000
Salon du livre de Montréal	Salon du livre	\$ 80,000
Salon du livre de Rimouski	Salon du livre	\$ 18,000
Salon du livre de Toronto	Salon du livre	\$ 27,500
Salon du livre de Trois-Rivières	Salon du livre (02/03-03/04)	\$ 2,178
Salon du livre de Trois-Rivières	Salon du livre (03/04-04/05)	\$ 19,500
Salon du livre d'Edmundston	Salon du livre	\$ 22,500
Salon du livre du Saguenay-Lac-St-Jean	Salon du livre, 39 ^e Salon	\$ 21,000
Salon international du livre de Québec	Salon du livre & Hors-les-Murs (02/03-03/04)	\$ 4,289
Salon international du livre de Québec	Salon du livre (03/04-04/05)	\$ 45,700
Saskatchewan Publishers Group	Books Go Public	\$ 22,713
Saskatchewan Publishers Group	Display Book Box	\$ 10,925
Saskatchewan Publishers Group	Web-based Project	\$ 5,750
Union des écrivaines et des écrivains québécois	Neuvième festival de littérature	\$ 30,000
Union des écrivaines et des écrivains québécois	Voix d'écrivains	\$ 5,500
Vancouver International Writers Festival	A World of Words	\$ 31,963
West Coast Book Prize Society	BC Book Prize	\$ 2,442
West Coast Book Prize Society	National Marketing	\$ 6,125
Winnipeg International Writers Festival	Author Specific Activities	\$ 31,944
Word on the Street	Children's Authors Tent	\$ 106,000
Wordfest: Banff-Calgary International		
Writers Festival	PanCanadian WordFest (2002 & 2003)	\$ 55,000
Writers' Trust	Canada Book Week	\$ 18,858

Subtotal	73 projects	\$2,041,301
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PROFESSIONAL DEVELOPMENT

Client	Project	Contribution
Association des libraires du Québec	Perfectionnement professionnel	\$ 16,000
Association nationale des éditeurs de livres	Perfectionnement professionnel	\$ 22,465
Association nationale des éditeurs de livres	Formation professionnelle : orientation 03-04	\$ 43,061
Association of Book Publishers of British Columbia	Professional Development	\$ 4,885
Association of Canadian Publishers	Media Monitoring	\$ 1,266
Association of Canadian Publishers	Professional Development	\$ 7,846
Association of Canadian Publishers	Summer Workshops	\$ 28,520
Association of English-language Publishers of Quebec	Professional Development	\$ 1,133
Association of Manitoba Book Publishers	Professional Development	\$ 374
Book Publishers Association of Alberta	Publishing 101	\$ 5,000
Literary Press Group of Canada	Professional Development	\$ 13,875
Mosquito Books Limited	Professional Development	\$ 2,400
Saskatchewan Publishers Group	Professional Development	\$ 12,621
Simon Fraser University	Master of Publishing	\$ 2,443
Simon Fraser University	Master of Publishing (03/04-04/05)	\$ 13,788
Simon Fraser University	Summer Workshops	\$ 28,955
Writers' Union of Canada	Professional Development	\$ 50,400

Subtotal	17 projects	\$ 255,031
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RESEARCH

Client	Project	Contribution
Association of Canadian Publishers	School Library Market	\$ 16,497
Opening Doors to Children, c/o Regina Public Library	Library Reading Survey	\$ 29,919
Subtotal	2 projects	\$ 46,416

BUSINESS PLANNING

Client	Project	Contribution
Douglas & McIntyre	Business Planning	\$ 21,690
Guides de voyage Ulysse Inc.	Planification d'entreprise	\$ 4,300
Kids Can Press Ltd.	Business Planning	\$ 20,000
Subtotal	3 projects	\$ 45,990

PUBLISHING INTERNSHIPS

Client	Project	Contribution
Anvil Press	Publishing Internship	\$ 3,234
Cormorant Books Inc.	Publishing Internship	\$ 10,230
ECW Press Ltd.	Publishing Internship (Toronto)	\$ 6,030
ECW Press Ltd.	Publishing Internship (Montreal)	\$ 5,156
Éditions Berger A.C. Inc.	Publishing Internship	\$ 3,308
Éditions du remue-ménage	Publishing Internship	\$ 9,000
Éditions Écosociété	Publishing Internship	\$ 6,795
Éditions Saint-Martin	Publishing Internship	\$ 9,000
Éditions trait d'union	Publishing Internship	\$ 6,705
Guides de voyage Ulysse Inc.	Publishing Internship	\$ 2,625
Heritage House Publishing Co. Ltd.	Publishing Internship	\$ 9,000
Heritage House Publishing Co. Ltd.	Publishing Internship	\$ 1,838
Kids Can Press Ltd.	Publishing Internship	\$ 5,850
McClelland & Stewart Ltd.	Publishing Internship	\$ 4,830
Natural Heritage	Publishing Internship	\$ 6,512
New Society Publishers Ltd.	Publishing Internship	\$ 3,600
Newest Publishers	Publishing Internship	\$ 6,600
Oolichan Books	Publishing Internship	\$ 1,980
Penumbra Press	Publishing Internship	\$ 2,065
Porcupine's Quill	Publishing Internship	\$ 3,563
Porcupine's Quill	Publishing Internship	\$ 4,725
Talon Books Ltd.	Publishing Internship	\$ 16,000
Subtotal	22 projects	\$ 128,644
TOTAL	117 projects	\$ 2,517,381

Supply Chain Initiative for Projects

Funding 2003-2004

BIBLIOGRAPHIC DATABASE

Client	Project	Contribution
Association des distributeurs exclusifs de livres en lanque française	Efficacité des échanges distributeurs/libraires	\$ 10,000
BookNet Canada	Bibliographic Data Strategy	\$ 142,825
Banque de titres de lanque française	Création et implantation d'une base de données bibliographiques	\$ 279,739
Green Gables Books	Sales Development Through Access to Electronic MARC Records	\$ 2,875
Library Services Centre	Database Modernization Project	\$ 48,707
Simon Fraser University	ONIX Automation Project (Phase 3): PExOD	\$ 102,908
TBM Book Manager Ltd.	TitleWave	\$ 46,489
Subtotal	7 projects	\$ 633,542

EDI / INFRASTRUCTURE

Client	Project	Contribution
Association of Canadian Publishers	EDI/Supply Chain Project	\$ 62,989
BookNet Canada	Electronic Communications Strategy	\$ 350,340
Britnell Book Wholesalers	EDI Implementation	\$ 31,625
Fairmount Books	Canadian Automated Shipping System Project	\$ 33,554
Fairmount Books	Computer Automated Ordering System	\$ 60,540
H.B. Fenn and Company	Distribution Centre Upgrade	\$ 81,700
H.B. Fenn and Company	Project W - Warehouse Automation	\$ 30,750
Library Bound Inc.	National Distribution and Processing Network	\$ 86,000
North 49 Books	Implementation of HI Point	\$ 48,955
Raincoast Books	Warehouse Management System and Radio Frequency Technology	\$ 110,033
University of Toronto Press Inc.	Improvement and Expansion of the Distribution Services of UTP	\$ 174,750
Whitecap Books	EDI Compliance and Website Overhaul	\$ 35,185
Subtotal	12 projects	\$ 1,106,420

OTHER

Client	Project	Contribution
BookNet Canada	Sales Data Tracking Implementation	\$ 73,411
BookNet Canada	Group Buying Strategy	\$ 120,818
Subtotal	2 projects	\$ 194,229

TOTAL	21 projects	\$ 1,934,192
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