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PUBLICATION OF
CANADIAN AUTHORS

Background Study

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PROGRAM EVALUATION DIVISION DE L'ÉVALUATION DES PROGRAMMES

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PUBLICATION OF
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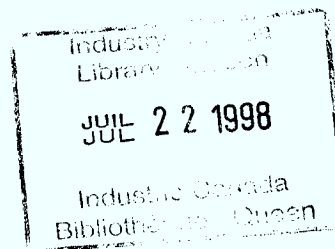
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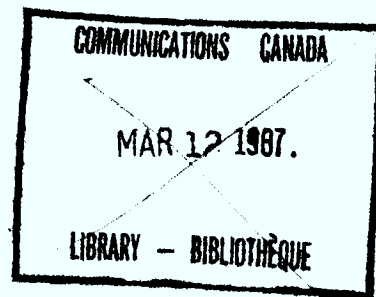
This is one of ten Background Studies on the Canadian book publishing industry that form part of the evaluation of the Book Publishing Development Program (BPDP).

The study was conducted by The Marsters Group Consulting Associates for the Program Evaluation Division of the Department of Communications, Canada. The views expressed herein are those of the author and do not necessarily represent the views or policies of the Department of Communications.

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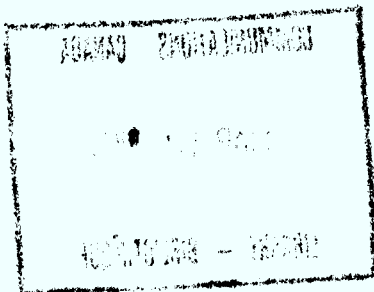


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EXECUTIVE SUMMARY

The evaluation of the Book Publishing Development Program (BPDP) includes an analysis of the rationale for the creation and implementation of the program. One of the key elements of this rationale is an assumption that Canadian publishers are more likely to publish Canadian authors than foreign-owned publishers. This assumption has been confirmed by the statistical analysis of a randomly selected sample of 400 books published in Canada during 1982. This sample was proportionally distributed between English and French language publications.

The analysis that has been carried out revealed that 76.7% of publications by Canadian-owned firms involved books by Canadian authors, as opposed to 59.2% in the case of foreign-owned firms. Overall, 74.4% of all publications in the sample could be attributed to Canadian authors.

Another statistically significant finding has to do with the publication of works of non-fiction where 77.1% of all publications by Canadian-owned firms was authored by Canadians, as compared to 50% in the case of foreign-owned firms. Overall, 73.7% of all non-fiction work could be attributed to Canadian-authors. Non-fiction was considered to be, by the authors interviewed during the evaluation process, the most financially rewarding category, as compared to fiction, scholarly, and other commercial categories. Thirty-eight percent of all the publications in the sample consisted of non-fiction work where both Canadian authors and Canadian publishers were involved.

Regarding the publication of new versus established authors, no differences were found, industry-wide, between Canadian-owned or foreign-owned firms: 25% of publications by Canadian publishers were by new authors, while 22% of those by foreign-owned publishers were by new authors, as well.

Some differences were found between small and large publishers regarding their publication of new versus established authors, but they do not appear to be statistically significant. Nearly 30% of all publications by publishers with annual net sales of less than \$100,000 were attributable to new authors, while only 22.2%

of the publications by firms with annual net sales of over \$3 million fell under the new-author category.

The author interviews appear to indicate that the most important factor in the movement of authors from small to large publishers may not be their previous number of publications, but whether or not they write within a commercial category that has, or has not, expected "mass appeal". Poets may always write for small publishers irregardless of their number of previous publications, while non-fiction writers may be more frequently published by the larger firms, where business considerations may be more critical than at a smaller firm. This seems to be confirmed by the small difference in the average number of previous publications by authors published by firms with annual net sales of less than \$100,000 and those with sales of over \$3 million. In the first case, the average number of previous publications by an author is 7.6, and 9.5 in the second case.

SOMMAIRE

L'évaluation du Programme d'aide au développement de l'édition canadienne (PADEC) comprend une analyse des motifs invoqués pour justifier la création et la mise en oeuvre du programme. Parmi les éléments clés qui entrent en ligne de compte, figure l'hypothèse selon laquelle les éditeurs canadiens seront plus portés à publier des livres écrits par des auteurs canadiens que ne le seront les éditeurs de propriété étrangère. Cette hypothèse a été confirmée par l'analyse statistique d'un échantillon choisi au hasard de 400 livres publiés au Canada en 1982.

L'analyse a révélé que 76,7 % des publications produites par des entreprises de propriété canadienne consistaient en livres écrits par des auteurs canadiens, par rapport à 59,2 % dans le cas des entreprises de propriété étrangère. Globalement, 74,4 % de toutes les publications composant l'échantillon étaient l'oeuvre d'auteurs canadiens.

Une autre constatation significative sur le plan statistique concerne l'édition d'ouvrages non romanesques. Dans ce domaine, 77,1 % de toutes les publications produites par des entreprises de propriété canadienne étaient écrites par des auteurs canadiens, par rapport à 50 % dans le cas des entreprises de propriété étrangère. Globalement, 73,3 % de tous les ouvrages non romanesques étaient l'oeuvre d'auteurs canadiens. Les auteurs interviewés au cours de l'évaluation ont estimé que la catégorie la plus rémunératrice était celle des ouvrages non romanesques, par rapport aux ouvrages romanesques et savants et à d'autres catégories commerciales. Trente-huit pour cent de toutes les publications composant l'échantillon consistaient en des ouvrages non romanesques dont les éditeurs aussi bien que les auteurs étaient canadiens.

Pour ce qui concerne la publication d'auteurs nouveaux par rapport aux auteurs reconnus, aucune différence n'a été constatée, à l'échelle de l'industrie, entre les entreprises de propriété canadienne et celles de propriété étrangère : 25 % des publications produites par des éditeurs canadiens étaient l'oeuvre de nouveaux auteurs, tandis que 22 % de celles produites par des entreprises de propriété étrangère étaient aussi l'oeuvre de nouveaux auteurs.

Certaines différences ont été constatées entre les petits et les grands éditeurs au chapitre de l'édition des ouvrages de nouveaux auteurs par rapport à celle d'auteurs reconnus, mais il ne semble pas qu'elles soient significatives du point de vue statistique. Près de 30 % de toutes les publications produites par des éditeurs dont les ventes annuelles nettes se chiffraient à moins de 100 000 \$ étaient l'oeuvre de nouveaux auteurs, alors que seulement 22,2 % des publications émanant d'entreprises dont les ventes annuelles nettes dépassaient 3 millions de dollars entraient dans la catégorie des ouvrages écrits par de nouveaux auteurs.

Les entrevues avec les auteurs semblent indiquer que le facteur le plus important qui amène les auteurs à passer des petits aux grands éditeurs n'est peut-être pas le nombre d'ouvrages que les auteurs ont déjà fait publier, mais le fait que leurs ouvrages s'inscrivent ou non dans une catégorie commerciale qui est ou n'est pas normalement susceptible d'intéresser un vaste public. Des poètes peuvent toujours écrire pour de petits éditeurs quel que soit le nombre d'ouvrages qu'ils ont déjà fait publier, tandis que les auteurs d'ouvrages non romanesques se font peut-être publier plus souvent par de grandes maisons d'édition, où des considérations commerciales jouent peut-être un rôle plus déterminant que dans une petite maison. Cela semble être confirmé par le peu de différence qu'il y a entre le nombre moyen de publications antérieures qu'ont à leur actif des auteurs dont les ouvrages sont publiés par des maisons d'édition ayant des ventes annuelles nettes de moins de 100 000 \$ et celles dont les ventes dépassent 3 millions de dollars. Dans le premier cas, le nombre moyen de publications antérieures par auteur est de 7,6, par rapport à 9,5 dans le second cas.

1.0 PURPOSE

This document presents the findings of one of the studies undertaken by the Program Evaluation Division, Department of Communications, in its evaluation of the Book Publishing Development Program (BPDP), as implemented by the Department. This particular effort examines the assumption that Canadian-owned publishers are more likely to develop Canadian-authored titles than foreign-owned publishers, and attempts to understand other aspects of the relationship between authors and publishers.

2.0 BACKGROUND

The Book Publishing Development Program (BPDP), established in 1979, has provided approximately \$7 million per annum to Canadian publishers to encourage the publication of Canadian authors. The following program elements are included in the BPDP:

- sales and marketing assistance;
- textbooks and related materials assistance;
- feasibility projects and implementation assistance;
- company analysis and implementation assistance;
- professional development assistance;
- research and documentaion assistance; and
- export marketing.

The intention of the BPDP was to assist in the stimulation of the Canadian-owned sector of the industry, which according to 1972 statistics¹ was greatly influenced by foreign authors and publishers. Tables 1 through 4 below show basic industry statistics for 1972-1974. Table 2 shows the overall dominance of foreign authors who accounted for 53% of all publications, while foreign-owned publishers were responsible for 42% of all books for that 2-year period. Taking a closer look at the types of publication attributable to Canadian and foreign publishers (Table 4) for 1972-1974, we can see that while foreign publishers were most active in the publication of works of fiction (children's and adult's), which accounted for 49% of their publications, Canadian publishers were most interested in adult non-fiction which accounted for 34% of their books.

1. Bureau of Management Consulting "The Publishing Industry in Canada", 1977.

TABLE 1
CANADIAN/FOREIGN AUTHORS BY OWNERSHIP OF PUBLISHER (1972-1974)

	Canadian Authors	Foreign Authors	Total
Canadian-owned publishers	2,484	1,876	4,360
Foreign-owned publishers	1,051	2,125	3,176
Total	3,535	4,001	7,536

Source: Bureau of Management Consulting, "The Publishing Industry in Canada, 1977.

TABLE 2
**PROPORTION OF CANADIAN/FOREIGN AUTHORS BY OWNERSHIP
OF PUBLISHER (1972-1974)**

	Canadian Authors	Foreign Authors	Total
Canadian-owned publishers	.70	.47	.58
Foreign-owned publishers	.30	.53	.42
Total	.47	.53	1.00

Source: Calculated from Table 1.

TABLE 3
CANADIAN/FOREIGN AUTHORS BY OWNERSHIP OF PUBLISHER
AND COMMERCIAL CATEGORY (1972-1974)

	FOREIGN PUBLISHERS		CANADIAN PUBLISHERS	
	Total Titles	Canadian Titles	Total Titles	Canadian Titles
Elementary/Hi-school	685	508	378	256
Post Secondary/Scholarly	492	232	1,236	643
Children's/Adult Fiction	1,542	111	1,273	485
Adult Non-fiction	458	200	1,473	1,100
	3,176	1,051	4,360	2,484

Source: Bureau of Management Consulting, "The Publishing Industry in Canada", 1977.

TABLE 4
PROPORTION OF CANADIAN/FOREIGN AUTHORS BY OWNERSHIP OF PUBLISHER
AND COMMERCIAL CATEGORY (1972-1974)

	FOREIGN PUBLISHERS		CANADIAN PUBLISHERS	
	Total Titles	Canadian Titles	Total Titles	Canadian Titles
Elementary/Hi-school	.22	.48	.09	.10
Post Secondary/Scholarly	.15	.22	.28	.26
Children's/Adult Fiction	.49	.11	.29	.20
Adult Non-fiction	.14	.19	.34	.44
	1.00	1.00	1.00	1.00

Source: Calculated from Table 3.

3.0 METHODOLOGY

3.1 The Evaluation Questions

The following questions were addressed:

What are the proportions of Canadian/Foreign authors published by ownership of publisher and commercial category for 1982? Are these proportions, if compared, significantly different from each other?

Do small Canadian publishers publish a greater proportion of new Canadian authors, as compared to large publishers for 1982? Do Canadian authors move from small to larger publishers in subsequent books?

We had initially attempted to detect historical trends by comparing 1972-74 Statistics Canada data for the industry with the 1982 random sample of 400. Unfortunately, the basis for these two studies are widely different and the results are not comparable; the present study is based on a random sample, previous studies were not. They relied on responses to questionnaires, and non-respondants were not followed-up. This self-selectivity favoured the larger firms at the expense of the smaller ones which may not have either the interest, or the staff, to fill out rather extensive questionnaire forms. A separate study is now tracking historical trends as determinable for Statistics Canada data bank.

3.2 Methodology:Overview

The research included the following steps:

- drawing a random sample of four hundred 1982 publications
- researching the following five variables for each sample:
 - citizenship of author
 - ownership of publisher
 - publisher size (net sales)
 - type (commercial category) of publication
 - number of previous publications by the author.

3.2.1 The Random Sample

The client made a decision early in the research planning phase that resources available for the study and the desired degree of reliability of findings would be satisfied by an analysis of 400 randomly selected 1982 publications. This early decision established the individual publication as the unit of analysis for the study. Further, a decision was made to distribute the sample between English and French language books proportionally to the number of publications in each language. Available data showed that 27%² of publications were in the French language, therefore 27% of the sample of 400, or 108 publications included in the sample, were French.

The samples were selected from the 1982 editions of "Canadian Books in Print" (English), and "La liste des livres disponible de langue française des auteurs et des editeurs canadiens" by Biblio-Informatica (French).

2. "Profiles of the Book Industry in Canada, 1980", Tables 13, 14.

Great attention was paid to ensure the randomness of the sample. The following steps were taken:

- the samples were selected from the TITLES version of the "Canadian Books in Print", and "La liste de livres" to avoid the clustering that could result from AUTHOR or SUBJECT versions;
- the generation, by the computer, of two sets of random numbers: one for the page to be sampled; one for the entry on that page; and
- after a point was located on the page and if this point did not yield a 1982 book, movements, alternatively backwards or forwards on the page took place until a 1982 book was located.

The above randomly generated numbers then guided the selection of 400 publications from the 1982 "Canadian Books in Print" and "La liste des livres disponible de langue française des auteurs et des editeurs canadiens"

3.2.2 The Variables

Five variables were researched for each of the 400 samples. Variables and data sources are shown below:

Variable	Data Source
• citizenship of author	• Wintario Half-Back List of Canadian Authors • National Library Depository • Telephone calls to publishers
• ownership of publisher	• DOC records on grant recipients • Statistics Canada • Association of Canadian Publishers • Telephone calls to publishers

Variable	Data Source
. publisher size (annual net sales)	. Statistics Canada
. type of publication	. DOBIS (national Library Data System)
. elementary/hi-school	
. post secondary/scholarly	
. adult/children's fiction	. consultant's judgement
. adult non-fiction	
. number of previous publications by an author	. DOBIS

3.2.3 Data Processing

After the above variables were researched, including telephone calls to publishers and authors, the data was analyzed through the application of the Statistical Packages for the Social Sciences (SPSS), including an analysis of the statistical significance of variable relationships.

In reading the following tables one may notice different total numbers for the same variable in different tables. This is explained by the fact that in drawing up a particular table the computer drops all samples for which all variables on that table are not available, which may vary for different cross-tabulations. Therefore, the percentage tables are more useful for a general understanding of this project.

4.0 FINDINGS

This section discusses the findings result of statistical analysis. Only those tables directly relevant to answering the evaluation questions are included in here. Additional cross-tabulations, and other general data may be found in the Appendix.

4.1 Sample Profile

A profile of the sample and the variables under study may be found on Table 5. We were successful in identifying the variables for over 95% of the sample size, with the exception of publisher size, where this variable was not determinable for 16.8% of the sample publications, and the number of previous publications by an Author where this variable is unknown for 14.9% of the sample.

A glance at the profile in Table 5 tells us that for this random sample, where the number of publications is the basis of analysis irregardless of sales volumes, the bulk of the activity within the industry is within the Canadian sector. Over 70% of the sample was attributable to Canadian authors; over 80% to Canadian publishers. For those publications for which publisher size was determinable, the largest number, or 27.5%, were by firms with annual net sales of over \$3 million. It was not possible to determine publisher size for 16.8% of the sample, however, we guess that most of these are small Canadian publishers.

TABLE 5
SAMPLE PROFILE

Variable	Percentage of Sample (400)
Citizenship of Author:	
Canadian	70.8
Foreign	25.3
Unknown	3.9
Ownership of Publisher:	
Canadian	83.3
Foreign	12.3
Unknown	4.4
Publisher Size:	
LT\$100K	26.8
\$100K-\$1M	22.5
\$1M-\$3M	6.5
\$3M+	27.5
Unknown	16.8
Commercial Category:	
Elementary/Hi School	4.0
Post Secondary/Scholarly	15.3
Children/Adult Fiction	23.5
Adult Non-Fiction	55.7
Unknown	1.5
Number Previous Publications by An Author:	
0	21.8
1-4	33.5
5-9	15.3
10+	14.5
Unknown	14.9

4.2 Citizenship of Author/Ownership of Publisher Relationships

Question: What are the proportions of Canadian/Foreign authors published by ownership of publishers and commercial categories for 1982? Are these proportions, if compared, significantly different from each other?

Findings: There is a significant relationship between the ownership of a publisher and the citizenship of an author (Table 6b). Over 76% of publications by Canadian publishers are by Canadian authors, as compared to 59.2% for foreign publishers. Overall, 74.4% of all publications were by Canadian authors, and 66.5% involved both a Canadian author and a Canadian publisher (Table 6c). Foreign authors published by foreign publishers account for only 5.4% of all publications.

Another statistically significant set of relationships was found in the proportion of Canadian authors and publishers responsible for adult non-fiction (Table 7b); 67.3% of all non-fiction work involved both Canadian authors and publishers.

TABLE 6a

1982 PUBLICATIONS BY OWNERSHIP OF PUBLISHER
AND CITIZENSHIP OF AUTHOR

<u>Author</u>	<u>Publisher</u>		<u>Total</u>
	<u>Canadian</u>	<u>Foreign</u>	
Canadian	244	29	273
Foreign	<u>74</u>	<u>20</u>	<u>94</u>
Total	318	49	367

TABLE 6b

1982 PUBLICATIONS BY OWNERSHIP OF PUBLISHER AND
CITIZENSHIP OF AUTHOR: COLUMN PERCENTAGES

<u>Author</u>	<u>Publisher</u>		<u>Total</u>
	<u>Canadian</u>	<u>Foreign</u>	
Canadian	76.7	59.2	74.4
Foreign	<u>23.3</u>	<u>40.8</u>	<u>25.6</u>
Total	100.0	100.0	100.0

TABLE 6c

1982 PUBLICATION BY OWNERSHIP OF PUBLISHER AND
CITIZENSHIP OF AUTHOR: TOTAL PERCENTAGES

<u>Author</u>	<u>Publisher</u>		<u>Total</u>
	<u>Canadian</u>	<u>Foreign</u>	
Canadian	66.5	7.9	74.4
Foreign	<u>20.2</u>	<u>5.4</u>	<u>25.6</u>
Total	86.7	13.4	100.0

Statistical Test: significant

TABLE 7a

1982 ADULT NON-FICTION PUBLICATIONS BY OWNERSHIP OF PUBLISHER AND CITIZENSHIP OF AUTHOR

<u>Author</u>	<u>Publisher</u>		<u>Total</u>
	<u>Canadian</u>	<u>Foreign</u>	
Canadian	138	13	151
Foreign	<u>41</u>	<u>13</u>	<u>54</u>
Total	179	26	205

TABLE 7b

1982 ADULT NON-FICTION PUBLICATIONS BY OWNERSHIP OF PUBLISHER AND CITIZENSHIP OF AUTHOR:TOTAL PERCENTAGES

<u>Author</u>	<u>Publisher</u>		<u>Total</u>
	<u>Canadian</u>	<u>Foreign</u>	
Canadian	67.3	6.3	73.7
Foreign	<u>20.0</u>	<u>6.3</u>	<u>26.3</u>
Total	87.3	12.7	100.0

TABLE 7c

1982 ADULT NON-FICTION PUBLICATIONS BY OWNERSHIP OF PUBLISHER AND CITIZENSHIP OF AUTHOR:COLUMN PERCENTAGES

<u>Author</u>	<u>Publisher</u>		<u>Total</u>
	<u>Canadian</u>	<u>Foreign</u>	
Canadian	77.1	50.0	73.7
Foreign	<u>22.9</u>	<u>50.0</u>	<u>26.3</u>
Total	100.0	100.0	100.0

Statistical Test:significant

For an analysis of proportion of authors and publishers involved in the four commercial categories see Table 8a, b, and c. Table 8a shows that data on these three variables (citizenship of author, ownership of publisher and commercial category) was available for 364 samples, or 91% of the sample of 400.

As previously discussed, adult non-fiction is heavily represented. Thirty-eight percent of the 364 identifiable samples involved Canadian publishers and Canadian authors engaged in the publication of adult non-fiction. Looking at Table 8c, the most striking difference between Canadian and foreign publishers is that only 5% of foreign authors engaged by foreign publishers are writing children/adult fiction while 25% of foreign writers published by Canadian publishers are within this commercial category.

TABLE 8a
1982 PUBLICATIONS BY OWNERSHIP OF PUBLISHER
AND CITIZENSHIP OF AUTHOR

	<u>Canadian Publishers</u>		<u>Foreign Publishers</u>		<u>Total</u>
	<u>Canadian Authors</u>	<u>Foreign Authors</u>	<u>Canadian Authors</u>	<u>Foreign Authors</u>	
Elementary/Hi School	11	2	2	1	16
Post Secondary/Scholarly	33	11	8	5	57
Children/Adult Fiction	61	18	6	1	86
Adult Non-Fiction	<u>138</u>	<u>41</u>	<u>13</u>	<u>13</u>	<u>205</u>
Total	243	72	29	20	364

TABLE 8b
1982 PUBLICATIONS BY OWNERSHIP OF PUBLISHER
AND CITIZENSHIP OF AUTHOR:TOTAL PERCENTAGES

	<u>Canadian Publishers</u>		<u>Foreign Publishers</u>		<u>Total</u>
	<u>Canadian Authors</u>	<u>Foreign Authors</u>	<u>Canadian Authors</u>	<u>Foreign Authors</u>	
Elementary/Hi School	.03	.01	.01	.01	.04
Post-Secondary/Scholarly	.09	.03	.02	.01	.16
Children/Adult Fiction	.17	.05	.01	.01	.24
Adult Non-Fiction	<u>.38</u>	<u>.11</u>	<u>.04</u>	<u>.04</u>	<u>.56</u>
Total	.67	.20	.08	.05	1.00

TABLE 8c

1982 PUBLICATIONS BY OWNERSHIP OF PUBLISHER
AND CITIZENSHIP OF AUTHOR: COLUMN PERCENTAGES

	<u>Canadian Publishers</u>		<u>Foreign Publishers</u>		<u>Total</u>
	<u>Canadian Authors</u>	<u>Foreign Authors</u>	<u>Canadian Authors</u>	<u>Foreign Authors</u>	
Elementary/Hi School	.05	.03	.07	.05	.04
Post-Secondary/Scholarly	.14	.15	.28	.25	.16
Children/Adult Fiction	.25	.25	.21	.05	.23
Adult Non-Fiction	<u>.56</u>	<u>.57</u>	<u>.44</u>	<u>.65</u>	<u>.56</u>
Total	1.00	1.00	1.00	1.00	1.00

It was possible to determine both publisher size and ownership of publisher for 327 samples, including 279 Canadian publishers and 48 foreign firms (Table 9a). Looking at Canadian publishers (Table 9c), 31.9% had annual net sales between \$100,000 and \$1 million, and over one-third (36.6%) had net sales of less than \$100,000. This percentage is likely to be significantly higher due to the high number of publishers for which sales data was not available, and which we anticipate include some very small Canadian firms. Foreign publishers in Canada are, as expected, among the larger firms; 91.7% have net sales of over \$3 million per annum.

Overall, (Table 9b) Canadian firms with sales of less than \$100,000 accounted for 31.2% of those in the sample.

TABLE 9a

1982 PUBLICATIONS BY OWNERSHIP OF PUBLISHER
AND PUBLISHER SIZE (NET SALES)

<u>Publisher Size</u>	<u>Publisher</u>		<u>Total</u>
	<u>Canadian</u>	<u>Foreign</u>	
LT\$100,000	102	1	103
\$100,000 - \$1M	89	1	90
\$1M - \$3M	24	2	26
\$3M+	64	44	108
Total	279	48	327

TABLE 9b

1982 PUBLICATIONS BY OWNERSHIP OF PUBLISHER
AND PUBLISHER SIZE: TOTAL PERCENTAGES

<u>Publisher Size</u>	<u>Publisher</u>		<u>Total</u>
	<u>Canadian</u>	<u>Foreign</u>	
LT\$100,000	31.2	0.3	31.5
\$100,000 - \$1M	27.2	0.3	27.5
\$1M - \$3M	7.3	0.6	8.0
\$3M +	19.6	13.5	33.0
Total	85.3	14.7	100.0

TABLE 9c

1982 PUBLICATIONS BY OWNERSHIP OF PUBLISHER
AND PUBLISHER SIZE: COLUMN PERCENTAGES

<u>Publisher Size</u>	<u>Publisher</u>		<u>Total</u>
	<u>Canadian</u>	<u>Foreign</u>	
LT\$100,000	36.6	2.1	31.5
\$100,000 - \$1M	31.9	2.1	27.5
\$1M - \$3M	8.6	4.2	8.0
\$3M+	22.9	91.7	33.0
Total	100.0	100.0	100.0

Tables 10a and 10b give an indication of the extent to which publishers of different sizes publish Canadian authors. Table 10b shows, as it could be anticipated, that a very high percentage (76.4%) of small publishers' output can be attributed to Canadian authors; on the other hand, large publishers, with at least \$3 million in net sales, publish the highest percentage (34.0%) of foreign authors of any of the publisher size categories.

TABLE 10a
1982 CITIZENSHIP OF AUTHOR BY
PUBLISHER SIZE

<u>Publisher Size</u>	<u>Author</u>		
	<u>Canadian</u>	<u>Foreign</u>	<u>Total</u>
LT\$100,000	81	25	106
\$100,000 - \$1M	64	21	85
\$1M - \$3M	20	5	25
\$3M+	70	36	106
Total	235	87	322

TABLE 10b
1982 CITIZENSHIP OF AUTHOR BY PUBLISHER SIZE:
ROW PERCENTAGES

<u>Publisher Size</u>	<u>Author</u>		
	<u>Canadian</u>	<u>Foreign</u>	<u>Total</u>
LT\$100,000	76.4	23.6	100.0
\$100,000 - \$1M	75.3	24.7	100.0
\$1M - \$3M	80.0	20.0	100.0
\$3M +	66.0	34.0	100.0

In regards to the commercial categories favored by publishers of different sizes, Table 11a and 11b are of assistance. All publishers, regardless of size, favor adult non-fiction, and exhibit the same pattern of preference with elementary/high school books being the least favored, followed by college and scholarly books, fiction, and at the top, adult non-fiction, the most favoured category. This is not surprising since it is our understanding that adult non-fiction is the most financially rewarding type of publication.

TABLE 11a

1982 PUBLICATIONS BY PUBLISHER SIZE AND COMMERCIAL CATEGORY

Publisher Size	Classification				Total
	Elementary/ High School	College/ Scholarly	Children Adult Fiction	Adult Non- Fiction	
LT\$100,000	4	15	31	55	105
\$100,000-\$1M	3	12	17	58	90
\$1-3M	3	5	4	13	25
\$3M+	6	23	26	55	110
	<u>16</u>	<u>55</u>	<u>78</u>	<u>181</u>	<u>330</u>

TABLE 11b

1982 PUBLICATIONS BY PUBLISHER SIZE AND COMMERCIAL CATEGORY: ROW PERCENTAGES

Publisher Size	Classification				Total
	Elementary/ High School	College/ Scholarly	Children Adult Fiction	Adult Non- Fiction	
LT\$100,000	3.8	14.3	29.5	52.4	100.0
\$100,000-\$1M	3.3	13.3	18.9	64.4	100.0
\$1-3M	12.0	20.0	16.0	52.0	100.0
\$3M+	5.5	20.9	23.6	50.0	100.0

4.3 Author Experience/Publisher Size Relationships

Question: Do small Canadian publishers publish a greater proportion of new Canadian authors, as compared to larger publishers for 1982? Do Canadian authors move from small to larger publishers in subsequent books?

Findings

The analysis indicates that smaller publishers tend to publish less experienced authors than larger firms, but the difference was not significant.

Table 12 shows that authors published by firms with sales between \$100,000 and \$1 million have, as an average, fewer publications to their names (5.3) than those published by the larger firms. For publishers of all sizes authors have published on an average of 8.1 books.

Tables 13a) and 13b) show that 29.2% of the publications by firms with sales of less than \$100,000 can be attributed to new authors, as compared to 22.2% in the case of firms with net sales of over \$3 million per annum. It is worth noting that these larger firms publish more new authors than medium size firms, (those with net sales between \$100,000 and \$3 million per annum). Likewise, these medium size firms publish a greater percentage (22.1 and 25.0%) of the authors with ten or more publications to their name.

On this question, author interviews indicate that experience may not be the single greatest factor in determining whether a writer is published by a small or a large firm. It appears that whether or not a book has "mass appeal" could be the critical factor; adult non-fiction, the commercial category with presumably the greatest possibility of financial gain, is the preferred category for publishers of all sizes. (Table 11b) Possibly, works such as poetry, or other books not in the mainstream of popular culture, are being primarily handled by the smaller firms, regardless of the experience of the author.

TABLE 12

AVERAGE PREVIOUS PUBLICATIONS BY AN AUTHOR
BY PUBLISHER SIZE

Publisher Size	<u>Average Number of Previous Publications by an Author</u>
LT\$100,000	7.6
\$100,000-\$1M	5.3
\$1-3M	9.0
\$3M+	<u>9.5</u>
Total	8.1

TABLE 13a

PREVIOUS PUBLICATIONS BY AN AUTHOR BY PUBLISHER SIZE

Publisher Size	<u>Previous Number of Publications by An Author</u>				<u>Total</u>
	<u>0</u>	<u>1-4</u>	<u>5-9</u>	<u>9+</u>	
LT\$100,000	26*	40	11	12	89
\$100,000-\$1M	18	35	14	19	86
\$1-3M	3	10	5	6	24
\$3M+	<u>22</u>	<u>34</u>	<u>25</u>	<u>18</u>	<u>99</u>
Total	69	119	55	55	298

* This means that 14 out of 232 authors (Canadian and Foreign) published their first book with publishers with sales under \$100,000 per annum. Data for both Publisher's Sales and Previous Number of Publications by an Author was available for only 232 publishers in the sample.

TABLE 13b

PREVIOUS PUBLICATIONS BY AN AUTHOR BY PUBLISHER SIZE:
ROW PERCENTAGES

Publisher Size	<u>Previous Number of Publications by An Author</u>				<u>Total</u>
	<u>0</u>	<u>1-4</u>	<u>5-9</u>	<u>9+</u>	
LT\$100,000	29.2	44.9	12.4	13.5	100.0
\$100,000-\$1M	20.9	40.7	16.3	22.1	100.0
\$1-3M	12.5	41.7	20.8	25.0	100.0
\$3M+	22.2	34.3	25.3	18.2	100.0

TABLE 14

AVERAGE PREVIOUS PUBLICATIONS BY AN AUTHOR
OWNERSHIP OF PUBLISHER

Publisher	<u>Average Number of Previous Publications by an Author</u>
Canadian	5.9
Foreign	<u>7.2</u>
Total	6.1

TABLE 15a

1982 PREVIOUS PUBLICATIONS BY AN AUTHOR
BY OWNERSHIP OF PUBLISHER

Previous Publications	Publisher		
	<u>Canadian</u>	<u>Foreign</u>	<u>Total</u>
0	70	10	80
1+	<u>210</u>	<u>36</u>	<u>246</u>
Total	280	46	326

TABLE 15b

1982 PREVIOUS PUBLICATIONS BY AN AUTHOR
BY OWNERSHIP OF PUBLISHER: COLUMN PERCENTAGES

Previous Publications	Publisher		
	<u>Canadian</u>	<u>Foreign</u>	<u>Total</u>
0	0.25	0.22	0.25
1+	<u>0.75</u>	<u>0.78</u>	<u>0.75</u>
Total	1.00	1.00	1.00

The movement of authors from one publisher to another will be further discussed below under Author Interview Summaries.

The bearing of an author's experience on his relationship with a publisher may also be discussed from the perspective of the Canadian or foreign firm. Table 14 shows that the Canadian firms publish authors with slightly fewer previous publications (5.9) than their foreign counterparts (7.2). Tables 15 a) and b), however, show that the percentage of new authors published by Canadian and foreign firms is almost the same, with 25% and 22%, respectively.

If Canadian and foreign firms get sub-categorized by publisher size (Tables 16a and b) there does not seem to be much of a difference in their publication of new authors. Foreign firms with less than \$1 million in net annual sales show as publishing no new authors because there is only one such firm. The only additional contribution of Tables 17a) and b) is to show that the bulk of the writers at both Canadian and publishing houses have between one and four publications to their names.

TABLE 16a
PREVIOUS PUBLICATIONS BY AN AUTHOR BY PUBLISHER
OWNERSHIP AND SIZE

Previous Publications	Canadian Publishers			Foreign Publishers		
	Less than \$1M	More than \$1M	Total	Less than \$1M	More than \$1M	Total
0	43	15	58	0	9	9
1+	127	64	191	2	34	36
	170	79	249	2	43	45

TABLE 16b

PREVIOUS PUBLICATIONS BY AN AUTHOR BY PUBLISHER
OWNERSHIP AND SIZE-COLUMN PERCENTAGES

Previous Publications	Canadian Publishers			Foreign Publishers		
	Less than \$1M	More than \$1M	Total	Less than \$1M	More than \$1M	Total
0	24.225.3	18.9	23.3	0	20.9	20.0
1+	<u>74.7</u>	<u>81.0</u>	<u>76.7</u>	<u>100.0</u>	<u>79.1</u>	<u>80.0</u>
	100.0	100.0	100.0	100.0	100.0	100.0

TABLE 17a

1982 PREVIOUS PUBLICATIONS BY AN AUTHOR
BY OWNERSHIP OF PUBLISHER

Previous Publications	Publisher		
	Canadian	Foreign	Total
0	70	10	80
1-4	116	16	132
5-9	47	13	60
10+	47	7	54
Total	<u>280</u>	<u>46</u>	<u>326</u>

TABLE 17b

1982 PREVIOUS PUBLICATIONS BY AN AUTHOR
BY OWNERSHIP OF PUBLISHER: TOTAL PERCENTAGES

Previous Publications	Publisher		
	Canadian	Foreign	Total
0	21.5	3.1	24.5
1-4	35.6	4.9	40.5
5-9	14.4	4.0	18.4
10+	14.4	2.1	16.6
Total	<u>85.9</u>	<u>14.1</u>	<u>100.0</u>

4.4 Author Interviews - Summary

To supplement the statistical study, eight Canadian authors with more than ten publications to their name were interviewed. Their works included adult non-fiction, adult and children's fiction, and high school textbooks. The interviews were open-ended and informal, with introductory remarks on DOC's wish to learn about the author's career, their relationship to publishers, and their reasons for moving from one publisher to another. Authors were extremely co-operative in all cases, and agreed that there was a great need for the present study.

The interview findings may be summarized as follows:

- five out of the eight authors had been published by foreign-owned publishers at one point or another in their careers, and several were first published by foreign firms; some authors felt that fifteen or twenty years ago, when they started publishing, they had a better chance of publishing in the United States, or England, where there was a more active industry;
- the key factor on whether an author is published by a small or a large publisher appears not to be his previous publishing experience, as much as the potential "mass appeal" of his book: poets tend to be published by small firms regardless of their number of previous publications; while adult non-fiction, which is more financially attractive than fiction, is perceived as displacing works of fiction at the larger publishing firms;
- one author, who started publishing in the early 1970's, stated that he is now being published by an English house. The Canadian firm he had once approached had asked him to find a co-publisher in the United States, or in England, to share the risk. Eventually, he was requested to deal exclusively with the English publisher.

- three out of eight authors expressed very strong opinions on the unwillingness of foreign-owned publishers to accept Canadian work;
- there was unanimous agreement on the need for the Federal government to continue its financial assistance programs to Canadian publishing firms;
- some of the larger houses, both domestic and foreign, are viewed as occasionally willing to publish Canadian works which are not expected to have significant mass appeal;
- there was some concern, expressed by several authors, regarding the poor quality of the works coming out of some of the smaller publishing firms, particularly in regards to editing and distribution; although admittedly, this situation has improved somewhat over the years, a suggestion was made that federal grants specify the percentage of funds required to be spent on good editors and adequate distribution systems. The public --- it was stated --- views books sponsored by the Canada Council as having "an official seal of approval", and their quality should live up to that expectation.

APPENDIX

LIST OF APPENDIX TABLES

- Table A-1** Publications by Citizenship of Author
- Table A-2** Publications by Ownership of Publisher
- Table A-3** Publications by Publisher Size (Net Sales)
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- Table A-11** All Publishers: Previous Publications by An Author by Commercial Category and Publisher Size
- Table A-12** Canadian Publishers: Previous Publications by An Author by Commercial Category and Publisher Size
- Table A-13** Foreign Publishers: Previous Publications by An Author by Commercial Category and Publisher Size

TABLE A-1

1982 PUBLICATIONS BY CITIZENSHIP OF AUTHOR

<u>Author</u>	<u>Absolute Frequency</u>	<u>Relative Frequency (Percent)</u>
Canadian	283	70.8
Foreign	101	25.3
Unknown	<u>16</u>	<u>4.0</u>
	400	100.0

TABLE A-2

1982 PUBLICATIONS BY OWNERSHIP OF PUBLISHER

<u>Author</u>	<u>Absolute Frequency</u>	<u>Relative Frequency (Percent)</u>
Canadian	333	83.3
Foreign	49	12.3
Unknown	<u>18</u>	<u>4.5</u>
	400	100.0

TABLE A-3

1982 PUBLICATIONS BY SIZE OF PUBLISHER (NET SALES)

<u>Publisher Size</u>	<u>Absolute Frequency</u>	<u>Relative Frequency (Percent)</u>
LT\$400,000	107	26.8
\$100,000-\$1M	90	22.5
\$1-3M	26	6.5
\$3-M+	110	27.5
Unknown	<u>67</u>	<u>16.8</u>
Total	400	100.0

TABLE A-4
1982 PUBLICATIONS BY COMMERCIAL CATEGORY

	<u>Absolute Frequency</u>	<u>Relative Frequency (Percent)</u>
Elementary/Hi School	16	4.0
Post Secondary/Scholarly	61	15.3
Children/Adult Fiction	94	23.5
Adult Non Fiction	223	55.7
Unknown	<u>6</u>	<u>1.5</u>
Total	400	100.0

TABLE A-5

1982 PREVIOUS PUBLICATIONS BY AN AUTHOR

<u>Previous Publications</u>	<u>Absolute Frequency</u>	<u>Relative Frequency (Percent)</u>
0	87	21.8*
1-4	134	33.5
5-9	61	15.3
10+	58	14.5
Unknown	<u>60</u>	<u>15.0</u>
Total	400	100.0

*This means that for 21.8% of authors in the sample, it was their first publication.

TABLE A-6
CITIZENSHIP OF AUTHOR BY THE NUMBER OF
PREVIOUS PUBLICATIONS

<u>Previous Publications</u>	<u>Author</u>		<u>Total</u>
	<u>Canadian</u>	<u>Foreign</u>	
0	48	36	84
1-4	98	29	127
5-9	47	9	56
10+	<u>43</u>	<u>15</u>	<u>58</u>
Total	236	89	325

(Total Percentages)

<u>Previous Publications</u>	<u>Author</u>		<u>Total</u>
	<u>Canadian</u>	<u>Foreign</u>	
0	14.8	11.1	25.8
1-4	30.2	8.9	39.1
5-9	14.5	2.8	17.2
10+	<u>13.2</u>	<u>4.6</u>	<u>17.8</u>
Total	72.6	27.4	100.0

Statistical Test = significant

TABLE A-7

1982 COMMERCIAL CATEGORIES BY CITIZENSHIP OF AUTHOR

(Number)

	Author		<u>Total</u>
	<u>Canadian</u>	<u>Foreign</u>	
Elementary/Hi School	13	3	16
Post Secondary/Scholarly	41	16	57
Children/Adult Fiction	70	22	92
Adult Non Fiction	<u>157</u>	<u>58</u>	<u>215</u>
Total	281	99	380

(Percentage)

	Author		<u>Total</u>
	<u>Canadian</u>	<u>Foreign</u>	
Elementary/Hi School	3.4	.8	4.2
Post Secondary/Scholarly	10.8	4.2	15.0
Children/Adult Fiction	18.4	5.8	24.2
Adult Non Fiction	<u>41.3</u>	<u>15.3</u>	<u>56.6</u>
Total	73.9	26.1	100.0

TABLE A-8

**1982 PUBLICATIONS BY OWNERSHIP OF PUBLISHER
AND CITIZENSHIP OF AUTHOR**

(Column Percentages)

	<u>Canadian Publishers</u>		<u>Foreign Publishers</u>	
	<u>Canadian Authors</u>	<u>Foreign Authors</u>	<u>Canadian Authors</u>	<u>Foreign Authors</u>
Elementary/Hi School	4.5	2.8	6.9	5.0
Post Secondary/Scholarly	13.6	15.2	27.6	25.0
Children/Adult Fiction	25.1	25.0	20.7	5.0
Adult Non-Fiction	<u>56.8</u>	<u>56.9</u>	<u>44.8</u>	<u>65.0</u>
Total	100.0	100.0	100.0	100.0

TABLE A-9
1982 COMMERCIAL CATEGORIES BY OWNERSHIP OF AUTHOR

(Number)

	Author		<u>Total</u>
	<u>Canadian</u>	<u>Foreign</u>	
Elementary/Hi School	13	3	16
Post Secondary/Scholarly	48	13	61
Children/Adult Fiction	81	7	88
Adult Non Fiction	<u>186</u>	<u>26</u>	<u>212</u>
Total	328	49	377

(Percentage)

	Author		<u>Total</u>
	<u>Canadian</u>	<u>Foreign</u>	
Elementary/Hi School	3.4	.8	4.2
Post Secondary/Scholarly	12.7	3.4	16.2
Children/Adult Fiction	21.5	1.9	23.3
Adult Non Fiction	<u>49.3</u>	<u>6.9</u>	<u>56.2</u>
Total	87.0	13.0	100.0

TABLE A-10

**1982 COMMERCIAL CATEGORIES BY OWNERSHIP OF PUBLISHER
AND CITIZENSHIP OF AUTHOR**

(Row Percentages)

	<u>Canadian Publishers</u>			<u>Foreign Publishers</u>		
	<u>Canadian Authors</u>	<u>Foreign Authors</u>	<u>Total</u>	<u>Canadian Authors</u>	<u>Foreign Authors</u>	<u>Total</u>
Elementary/Hi School	84.6	15.4	100.0	66.7	33.3	100.0
Post Secondary/Scholarly	75.0	25.0	100.0	61.5	38.5	100.0
Children/Adult Fiction	77.2	22.8	100.0	85.7	14.3	100.0
Adult Non-Fiction	77.1	22.9	100.0	50.0	50.0	100.0

TABLE A-11

ALL PUBLISHERS: PREVIOUS PUBLICATIONS BY AN AUTHOR
BY COMMERCIAL CATEGORY AND PUBLISHER SIZE

(Row Percentages)

<u>Publisher Size</u>	<u>Elementary/High School, College/Scholarly</u>				<u>Children-Adult Fiction/Adult Non-Fiction</u>			
	<u>0</u>	<u>1-4</u>	<u>5+</u>	<u>All</u>	<u>0</u>	<u>1-4</u>	<u>5+</u>	<u>All</u>
LT\$100,000	33.3	44.4	22.2	26.5	28.2	45.1	26.8	26.3
\$100,000-\$1M	14.3	42.9	42.9	20.6	22.2	40.3	37.5	26.7
\$1M+	18.2	30.3	51.5	48.5	21.3	38.2	40.4	33.0
Unknown	66.2	0	33.3	4.4	42.1	39.5	18.4	14.1
Total	23.5	35.3	41.2	100.0	26.3	40.7	33.0	100.0

TABLE A-12

CANADIAN PUBLISHERS: PREVIOUS PUBLICATIONS BY AN AUTHOR BY
COMMERCIAL CATEGORY AND PUBLISHER SIZE

(Row Percentages)

<u>Publisher Size</u>	<u>Elementary/High School, College/Scholarly</u>				<u>Children-Adult Fiction/Adult Non-Fiction</u>			
	<u>0</u>	<u>1-4</u>	<u>5+</u>	<u>All</u>	<u>0</u>	<u>1-4</u>	<u>5+</u>	<u>All</u>
LT\$100,000	33.3	44.4	22.2	34.0	28.4	46.3	25.4	29.6
\$100,000-\$1M	14.3	42.9	42.9	26.4	22.5	40.8	36.6	31.4
\$1M+	15.8	26.3	57.9	35.8	20.3	40.7	39.0	26.1
Unknown	<u>50.0</u>	<u>0</u>	<u>50.0</u>	<u>3.8</u>	<u>37.9</u>	<u>44.8</u>	<u>17.2</u>	<u>12.8</u>
Total	22.6	35.8	41.5	100.0	25.7	42.9	31.4	100.0

TABLE A-13

FOREIGN PUBLISHERS: PREVIOUS PUBLICATIONS BY AN AUTHOR
BY COMMERCIAL CATEGORY AND PUBLISHER SIZE

(Row Percentages)

<u>Publisher Size</u>	<u>Elementary/High School, College/Scholarly</u>				<u>Children-Adult Fiction/Adult Non-Fiction</u>			
	<u>0</u>	<u>1-4</u>	<u>5+</u>	<u>All</u>	<u>0</u>	<u>1-4</u>	<u>5+</u>	<u>All</u>
LT\$100,000	0.0	0.0	0.0	0.0	0.0	100.0	0.0	3.2
\$100,000-\$1M	0.0	0.0	0.0	0.0	0.0	0.0	100.0	3.2
\$1M+	21.4	35.7	42.9	93.3	20.7	34.5	44.8	93.5
Unknown	<u>100.0</u>	<u>0.0</u>	<u>0.0</u>	<u>6.7</u>	<u>0.0</u>	<u>0.0</u>	<u>0.0</u>	<u>0.0</u>
Total	26.7	33.3	40.0	100.0	19.4	35.5	45.2	100.0



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