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Project Report

**INVESTING IN THE DEVELOPMENT OF
CANADIAN AUTHORS**

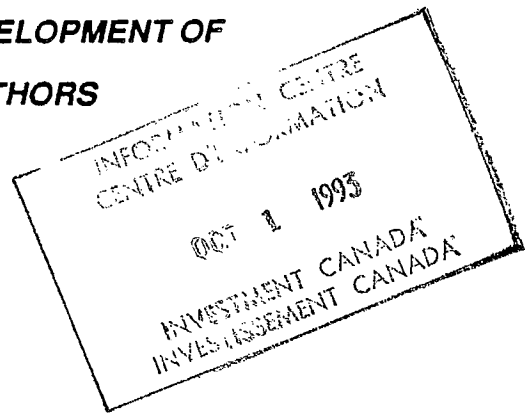


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Project Report

INVESTING IN THE DEVELOPMENT OF CANADIAN AUTHORS



Prepared for

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Executive Summary

A. Background

It has been frequently stated that Canadian-controlled publishers have a special and critical role in trade and literary publishing in Canada. Without them, it is claimed that many—if not most— aspiring Canadian authors in this field would not be brought to the attention of the Canadian public.

It is also claimed that trade publishing is not generally profitable in Canada, largely due to the small domestic market and to a lack of subsidiary markets, and that literary publishing is even more unprofitable. The argument runs that if culturally-significant publishing is to continue in Canada, it must depend upon committed Canadian publishers with a strong sense of vocation. In their absence, there are no guarantees that even a healthy and profitable industry would publish such books without some form of incentive.

A key assertion in this argument is that although it is Canadian-controlled publishers—often smaller ones—who are instrumental in introducing Canadian authors to an audience, they are frequently denied the longer-term rewards of doing so by having their authors lured away, as their popularity increases, to larger, more commercial houses, often foreign-owned. This “bleeding away” of authors, upon whom editorial and promotional effort has been expended during the earlier, less rewarding stage of their career, leaves the smaller Canadian-controlled publisher in the unwelcome position of acting as an unrewarded “farm team” for the bigger league publishers. These larger publishers, who will reap the rewards of greater sales and subsidiary income from authors that the smaller Canadian-controlled companies have developed, are characterized as unwilling to devote their own resources to seeking out and developing new authorial talent. They are, however, all too eager to acquire it once it has exhibited signs of potential marketability.

The main purpose of this study was to test the above assertion as well as to explore the role of publishers and literary agents in developing Canadian authors.

B. Study issues

The Terms of Reference for the study requested that the following issues be addressed:

- ▶ Identify any patterns in English-language publisher-author relationships, using available empirical sources, e.g., identifying patterns in new Canadian-authored titles by tradebook subject using the Statistics Canada book publishing statistics and the Canadian Books in Print data.
- ▶ Analyze the role of the literary agent in developing agents and how the agent affects the choice of publishers.
- ▶ Assess the propensity of authors to change publishers as they establish themselves in the commercial market.
- ▶ Assess the strengths and weaknesses of publishers in their performance of various services and functions vis-à-vis the development of authors, and identify any patterns regarding size or other publisher characteristics. Such functions and services include:
 - editing
 - marketing
 - promotion
 - financing
 - distribution.
- ▶ Analyze the role of smaller publishers in developing authors in the early stages of their literary career and once authors have achieved sufficient audience to have commercial market potential.
- ▶ Compare Canadian-controlled with foreign-controlled publishers in their performance in developing Canadian authors.
- ▶ Identify patterns in the movement of authors among publishers as they develop.
- ▶ Note any implications from the findings on the above issues for government policy and programs.

C. Approach

The study involved the following activities:

- ▶ Analysis of available empirical data on the relationships between new Canadian-authored titles and Canadian- versus foreign-controlled publishers.

- ▶ Personal and telephone interviews with some 25 literary agents, publishers and tradebook authors in Canada (listed in the appendix).
- ▶ Review of previous studies and reports that bear on the issue of publisher-author relationships.

D. Study conclusions

There are two main types of activity associated with the publication and development of Canadian authors:

- ▶ The activity of the larger English-language commercial publishers, both Canadian- and foreign-owned, who, acting with literary agents, seek out those authors whose work is suitable for the larger, more general markets to which they have access.
- ▶ The activity of smaller Canadian-owned publishers who provide a publishing venue in which the likelihood of "commercial" success has less relevance to what is published than do considerations of cultural significance and literary quality.

Our conclusions, therefore, are organized according to these two categories of publishers.

1. Larger trade publishers

- ▶ **There are, in general, no major differences in the business practices between larger Canadian-controlled and foreign-controlled trade publishers.**
- ▶ **It is among larger trade publishers that literary agent activity takes place.**
- ▶ **Literary-agents prefer not to deal with small publishers.**
- ▶ **Literary-agents have difficulties placing "literary" manuscripts with commercial publishers.**
- ▶ **Literary-agents have assumed the role of author development.**
- ▶ **Literary-agents have the main role in developing the various rights in an authors work.**

2. Smaller trade publishers

- ▶ **Smaller Canadian publishers play an active role in introducing Canadian authors to the marketplace but lack the means to enable them to fully exploit their market potential.**

- ▶ **Smaller publishers typically have only a limited means of promoting their product.**

3. Industry needs

Based on our analysis, there are a number of industry needs, which are mainly related to the promotion problems of the trade book industry.

- ▶ **Concern regarding inadequate marketing and promotion is widespread throughout the industry.**
- ▶ **Difficulties of financing individual efforts in promotion ought to encourage the consideration of cooperative effort.**
- ▶ **The lack of industry activity directed at consumers is a serious deficiency in book promotion.**

//

Introduction

A. Background

It has been frequently stated that Canadian-controlled publishers have a special and critical role in trade and literary publishing in Canada. Without them, it is claimed that many—if not most— aspiring Canadian authors in this field would not be brought to the attention of the Canadian public.

It is also claimed that trade publishing is not generally profitable in Canada, largely due to the small domestic market and to a lack of subsidiary markets, and that literary publishing is even more unprofitable. The argument runs that if culturally-significant publishing is to continue in Canada, it must depend upon committed Canadian publishers with a strong sense of vocation. In their absence, there are no guarantees that even a healthy and profitable industry would publish such books without some form of incentive.

A key assertion in this argument is that although it is Canadian-controlled publishers—often smaller ones—who are instrumental in introducing Canadian authors to an audience, they are frequently denied the longer-term rewards of doing so by having their authors lured away, as their popularity increases, to larger, more commercial houses, often foreign-owned. This “bleeding away” of authors, upon whom editorial and promotional effort has been expended during the earlier, less rewarding stage of their career, leaves the smaller Canadian-controlled publisher in the unwelcome position of acting as an unrewarded “farm team” for the bigger league publishers. These larger publishers, who will reap the rewards of greater sales and subsidiary income from authors that the smaller Canadian-controlled companies have developed, are characterized as unwilling to devote their own resources to seeking out and developing new authorial talent. They are, however, all too eager to acquire it once it has exhibited signs of potential marketability.

The main purpose of this study was to test the above assertion as well as to explore the role of English-language publishers and literary agents in developing Canadian authors. Specifically, the study investigated the following issues, which are further described in Chapter II:

- ▶ To analyze the role of literary agents in developing authors.
- ▶ Analyze the movement of Canadian authors among publishers as they establish their careers.

- ▶ Assess the impacts of variations in publisher services and functions (e.g., pricing, promotion, selling of rights) on the development of authors.
- ▶ Analyze available empirical data on the relationships between Canadian- and foreign-owned publishers and Canadian authors.
- ▶ Assess the role of smaller publishers in developing new authors.
- ▶ Compare the performance of large- and medium-size Canadian-owned versus foreign-owned publishers in developing Canadian authors.
- ▶ Note any implications of the analysis on the above issues for government policy and programs directed at the book industry in Canada.

This study was undertaken on behalf of the Service and Cultural Industries group of Investment Canada by Peat Marwick Stevenson & Kellogg, in conjunction with Mr. Bill Roberts, a consultant to Canada's book industry and a Senior Associate of the firm.

III

Study Issues And Approach

A. Issues

The Terms of Reference for the study requested that the following issues be addressed:

- ▶ Identify any patterns in English-language publisher-author relationships, using available empirical sources, e.g., identifying patterns in new Canadian-authored titles by tradebook subject using the Statistics Canada book publishing statistics and the Canadian Books in Print data.
- ▶ Analyze the role of the literary agent in developing agents and how the agent affects the choice of publishers.
- ▶ Assess the propensity of authors to change publishers as they establish themselves in the commercial market.
- ▶ Assess the strengths and weaknesses of publishers in their performance of various services and functions vis-à-vis the development of authors, and identify any patterns regarding size or other publisher characteristics. Such functions and services include:
 - editing
 - marketing
 - promotion
 - financing
 - distribution.
- ▶ Analyze the role of smaller publishers in developing authors in the early stages of their literary career and once authors have achieved sufficient audience to have commercial market potential.
- ▶ Compare Canadian-controlled with foreign-controlled publishers in their performance in developing Canadian authors.

- ▶ Identify patterns in the movement of authors among publishers as they develop.
- ▶ Note any implications from the findings on the above issues for government policy and programs.

B. Approach

The study involved the following information activities:

- ▶ Analysis of available empirical data on the relationships between new Canadian-authored titles and Canadian- versus foreign-controlled publishers.
- ▶ Personal and telephone interviews with some 25 literary agents, publishers and tradebook authors in Canada (listed in the appendix).
- ▶ Review of previous studies and reports that bear on the issue of publisher-author relationships.

IV

General Description Of Authors, Agents And Publishers

A. Authors

What is an author? Someone who makes a living by writing? That would seem to be a logical answer although as we know, it is not the right one. Some writers in every age have certainly lived by writing, but not many. Most have had to rely on patronage or on some occupation auxiliary to, or outside literature, and must do so today. Economics have always bedeviled authorship, often to the point of extinction.¹

Few of the over 700 members of the Writers Union of Canada support themselves by writing. The association directory reveals a variety of author occupations, past and present. These range from modelling to copywriting, from professorship to backwoods guiding.

Many of these writers have names which bookstore and library patrons would recognize at once. They are reviewed periodically, and some have a number of titles to their credit, and almost all earn a living outside of creative writing.

Success in book writing is most often equated in the public mind with the best-seller lists. Most Canadians if asked what they imagine an author's likeliest ambition might be, would probably answer "to write a best-seller."

But "best-sellerdom" is only one kind of success in writing and "commercial" authors who produce Canadian best-sellers are, by definition, only a very small proportion of the book-writers at work in Canada.

Many authors would say that "success" is the writing of books which earn favourable reviews from people whose respect and praise the author values, or which appear as part of a publishers list, not noted perhaps for best-seller, but known and respected by serious readers and critics.

¹ Victor Bonham-Carter, *Society of Authors, London, 1978.*

For many, this is to be "well published," to reach those readers, perhaps relatively few, who constitute what Robertson Davies (himself both a literary success and a best-seller) has called the "clerisy" of intelligent committed readers of literature.

Put more prosaically, authors will often be prepared to sacrifice market considerations for writing considerations.

It is of course also true that many manuscripts each year are improved, adapted, modified or otherwise altered at the suggestion of literary agents and editors in search of marketability. Many authors cooperate eagerly in this activity.

The fundamental point however remains, that by no means all writers—even frequently published ones—are in search of a home with a large commercial publisher whose books dominate the lists of best-sellers.

Writing is a lonely art. This is a universal complaint of authors throughout the ages. For modern writers, rapport with a publisher, editor or agent, can often be more important than any considerations of advances or royalty arrangements.

Because of this, writers are not always well equipped to act in their own best interests in these mundane, practical matters—hence the appearance of literary agents.

B. Literary agents

Literary agents, acting alone, or as members of an agency are a major source—probably the main source—of manuscripts and book ideas for publishers in Canada today.

With the growth of publishing in Canada, the style of relationship between publisher and writers has become less personal. Agents have emerged as intermediaries, offering necessary support and encouragement to writers, yet able to deal with publishers on a business basis.

It is difficult to say just how many agents are operating in Canada at present. Small agencies come and go (three changes occurred among agents during the brief period of this study). There are probably about ten active agents at present operating in the general trade book area. Agents must maintain a very close watch on the publishing scene if they are to serve their authors well.

Literary agents are not a new part of the book industry, but it is only in the last ten years that they have become an accepted part of the Canadian publishing scene. Few Canadian agents specialize, though they may prefer one kind of book (or author) over another. If an author appears to have a saleable idea, whether it be a book of fiction or a cookbook, an agent is likely to be interested in handling it. However, as we suggest later in exploring the current publishing scene, a novel would have to be very good indeed to be of interest at present, and poetry manuscripts—even by established authors—have no attractions for agents. Agent income is keyed directly to author success, usually in the form of about 10% of earnings; consequently the productivity of their authors, is a major

preoccupation of agents. Attention is paid to subsidiary rights, foreign editions where possible, reprinting of earlier works, etc.

Attention to detail is a successful agent's strong suit, and they have undoubtedly introduced a more business-like atmosphere into author-publisher relations.

C. Publishers

Publishers in English Canada, as elsewhere, come in considerable variety. About 20 of the more important firms operating in Canada are branches of foreign firms or international conglomerates, and these are the main distributors of foreign (mainly U.S.) books in Canada. They are powerful in the educational market and about six of them engage in general trade publishing at some level. These firms are generally well-financed and profitable.

There are about an equal number (6) of Canadian-owned, English-language Canadian publishers, or agent-publishers who compete with these foreign-owned firms in the general trade market on more or less equal terms. The financial condition of some of these Canadian houses is sometimes in question, especially in times of recession. They are, all, however, important publishers in terms of the size and the commercial attractiveness of their lists.

By far the largest number of publishers in Canada publishing general trade books in English (about 70, although the number varies constantly) are quite small. These are the literary and smaller specialty presses who exist in a network of federal and provincial grants and subsidies essential to the continuation of most of them. Few are very profitable even after grants and subsidies are taken into account. Many of these presses although small in terms of gross sales, have varied lists and the number of titles, and range of topics they publish can be impressive.

V

A Statistical Profile Of The Trade Book Sector

A. Introduction

In this section we provide a statistical overview of the trade book sector in Canada.¹ The data were provided by Statistics Canada, which conducts an annual survey of book publishers. The focus is on the English-language trade book industry, a sector which encompasses much of the book product of "cultural significance", and which accounts for about one-quarter of all English-language book sales by publishers and agents in Canada.

The category of trade books includes such genres as fiction, history, political and business books of general interest, poetry and plays, sports, natural science, biography, and memoirs. Because publishers, in responding to the Statistics Canada survey, do not provide information on specific titles, we are told by Statistics Canada that some publishers may include under trade books such titles as gardening, cookbooks, and other titles which would be more appropriately classified as general reference books.

The other major categories of books that are monitored by Statistics Canada, such as mass market paperbacks, textbooks, reference books, and professional and technical books, are not examined in this section, since the focus of the study is on trade books. The mass market segment (rack size paperbacks) is excluded, since the focus here is on the development of Canadian authors who publish books of cultural significance—areas in which mass market paperbacks have limited significance.

The analysis is based on 1988-89 survey data provided by Statistics Canada. In Statistics Canada nomenclature, small/medium firms have annual revenue below \$1 million. Firms with revenue of \$1-5 million are termed "intermediate" for purposes of this study, while firms with revenue of \$5 million and above are termed "large". We also use the term "specialist" for publishers which have more than 50% of sales from own titles in one commercial category (for the purposes of this study, only trade specialists are covered).

¹ *This section is based on an analysis carried out by Investment Canada. Interested readers should contact the agency for further details.*

B. The trade book market

Sales (net of returns) of trade hardcover and paperback titles in Canada, as reported by some 147 publishers and publisher-agents in 1988-89 were \$206.8 million, as shown in Exhibit 1. Agents which focused exclusively on distribution of imported titles accounted for another \$32.8 million. Thus, in total, the trade book market was valued at \$240 million at wholesale value (i.e., the value of the books sold by publishers to the first point of sale, e.g., bookstores). It should be noted that this market figure does not include the value of direct imports, i.e., books imported directly by booksellers, libraries, consumers, etc. Data on direct imports are very sketchy.¹

Of this market of \$240 million, sales of Canadian-authored trade books that were published in Canada accounted for 26% of the total. A further 70% of total sales were accounted for by imported agency titles. Finally, 5% of the total were sales of books published in Canada, but were Canadian editions of foreign-authored titles.

C. Defining categories of trade book publishers

Two groups of trade publishers were analyzed:

- ▶ Large, commercial-scale, trade book specialists. Firms which have more than 50% of their published title sales in trade books, and which had total book revenue of at least \$5 million.
- ▶ Merit publishers: Publishers which specialize in trade books which tend to be literary in nature.

Other categories of publishers that were not analyzed would include large, commercial-scale publishers for which trade books are a secondary activity, and intermediate-scale specialists with agency lines.

¹ For an analysis of the direct imports issue, see Department of Communications, *Estimating the Book Market in Canada*, prepared by Peat Marwick Stevenson & Kellogg, 1990.

Exhibit 1
Trade book sales by category of publisher, 1988-89

Publisher Category	Number of firms	Trade Book Sales		Percentage Shares		
		Canadian-authored (\$ million)	Total	Canadian-authored sales as a percent of total firm sales	Percent of industry's Canadian-authored sales (%)	Percent of industry's trade sales
▶ Large commercial trade specialist						
Canadian controlled	3	12.2	33.1	37	20	14
Foreign controlled	5	9.4	61.1	15	15	26
Both	8	21.6	94.2	23	35	39
▶ Merit						
Intermediate size	11	9.1	10.5	87	15	4
Small/medium	103	12.8	14.7	87	21	6
Both	114	21.9	25.2	87	35	11
▶ Other publishers*	25	18.2	87.3	21	29	36
▶ All publishers of trade books	147	61.9	206.8	30	100	86
▶ Exclusive agents only	22	-	32.8	-	-	14
▶ Totals	169	61.9	239.6	26	-	100

* This category includes commercial supplementary publishers and intermediate-scale specialists with agency lines.

Source: Statistics Canada, special tabulations from 1988-89 book publishing survey.

D. Commercial trade publishers compared to merit publishers

1. Commercial trade book specialists

There are eight publishers in this category of firms which specialize in trade books and which have sales of over \$5 million. Three of these publishers are Canadian controlled, the other five are foreign controlled.

Together, this group of eight publishers accounted for 39% of total trade book sales in Canada. Their Canadian-authored trade book sales comprised 23% of their total sales. This group of publishers accounted for 35% of all Canadian-authored trade sales.

As shown in Exhibit 2, Canadian-controlled firms had average sales of Canadian trade titles of \$4.1 million, out of total trade sales of \$11.0 million (i.e., both Canadian- and foreign-authored titles). Foreign-controlled companies had average sales of Canadian trade sales of \$1.9 million, out of total trade sales of \$11.8 million.

Canadian-controlled publishers are more focused on trade books, as 90% of their total sales were in the trade book category. Foreign-controlled publishers, on the other hand, had only 59% of their sales in the trade book category. An examination of their catalogues revealed that foreign-controlled publishers handled a considerable number of imported titles in such non-trade categories as general reference.

Exhibit 2
Average firm trade book sales* of commercial-scale trade specialists,
1988-89

	<u>Canadian-</u> <u>authored titles**</u>	<u>Other titles**</u>	<u>Total</u>
Canadian- controlled	4.1	7.0	11.0
Foreign- controlled	<u>1.9</u>	<u>10.3</u>	<u>12.2</u>
Both	2.7	9.1	11.8

* Sales in Canada only.

** Includes both newly published titles and reprints.

Source: Statistics Canada

Observations

Canadian-controlled publishers are more focused on Canadian-authored trade titles (one publisher had no agency sales at all). It should be noted, however, that the foreign-controlled publishers, on average, did achieve a reasonable degree of success in publishing Canadian authors.

Most foreign- and Canadian-controlled publishers had a higher proportion of sales in imported agency trade titles than in Canadian-authored titles.

The greater focus of Canadian-controlled trade specialists on trade books reflects a number of factors. These would include their more pronounced emphasis on publishing as a source of sales and their lower access to imported agency lines.

2. Merit publishers

The group of merit or literary publishers includes all the regional publishers, most of the publishers of poetry and plays, the publishers of much Canadian fiction, and a range of special interest publishers. The group consists of 103 publishers with sales of under \$1 million, as well as 11 intermediate-size publishers, almost all of which were publishers only (i.e., they had no agency lines) and which reported some sales in the trade book category. Merit publishers are virtually all Canadian controlled.

Virtually all the sales of merit publishers were derived from their own titles, within which Canadian-authored titles accounted for about 90% of sales. In aggregate, merit publishers contributed a modest volume (11%) of trade book sales. However, their works accounted for a significant proportion (35%) of Canadian-authored trade sales.

The intermediate size sub-group in this category accounted for a significant share of the category's Canadian sales, accounting for about 42% of the Canadian-authored trade sales of this class. This sub-group's average Canadian-authored trade title sales were \$0.8 million and average total trade sales were almost \$1 million.

Turning to the number of titles published, it is evident from Exhibit 3 that merit publishers play a significant role in bringing Canadian authors to market. The merit publishers accounted for some 55% of all Canadian trade titles published. The commercial specialist group accounted for 23% of all Canadian trade titles.

Exhibit 3
Canadian-authored trade titles, 1988-89

Category of Publisher	Number of newly published trade titles	Percentage share of industry's trade titles	Average number of titles per publisher*
▶ Commercial trade specialist			
Canadian controlled	172	13	57
Foreign controlled	<u>131</u>	<u>10</u>	<u>26</u>
Both	303	23	38
▶ Merit			
Intermediate	95	7	9
Small/medium	<u>641</u>	<u>48</u>	<u>6</u>
Both	736	55	6
▶ All publishers of trade titles	1,343	100	9

* Average includes all firms in the category, whether or not new titles were reported in 1988-89.

Source: Statistics Canada

D. Financial performance

Elsewhere in this report we discuss the difficulties that publishers of all sizes in Canada are encountering in generating a profit from their operations. Unfortunately, the Statistics Canada survey does not gather data on sales of new titles published, since reprinted titles are also included in total sales. However, it is evident that the individual sales volumes of the merit publishers are very small, and few have any other source of business income, except for government subsidies. The fragmentary information on the larger commercial scale specialists indicates that grants are a relatively minor source of revenue overall (equivalent to about 6% of Canadian trade sales). These grants, however, appear to have encouraged these firms to publish some literary titles.

In comparing commercial scale with merit publishers, we would expect that sales per title would be much greater for the commercial group. The ratio of Canadian-authored trade sales to new titles is indicative, being consistent with stronger dollar sales per title performance by the commercial scale publishers. It suggests differences in the kind of titles being released, as well as in the marketing capacities of the publishers.

E. Summary of analysis of Statistics Canada data

The main conclusions of the above analysis are as follows:

- ▶ The commercial-scale publishers dominate the trade book marketplace:
 - The eight large commercial-scale trade specialists account for almost two-fifths of the revenue from trade books.
 - All commercial-scale publishers, including those in which trade is a secondary activity, together account for some two-thirds of trade book sales.
 - In aggregate, agency import trade sales by commercial-scale publishers account for the bulk of trade business, in both the Canadian- and foreign-controlled segments.
- ▶ Among the commercial-scale publishers, Canadian-authored trade books play a strong role:
 - sales of Canadian-authored trade books account for about one-quarter of total revenue from trade books.
 - commercial-scale foreign publishers have significant Canadian-authored sales, accounting for some 29% of all Canadian-authored trade sales.
 - Canadian-controlled commercial specialists are more focused on Canadian-authored titles than are their foreign-controlled counterparts.

This is explained by several factors, including their stronger commitment to Canadian titles; their lower access to imported agency lines; and, their eligibility for government grants. This difference, however, is more one of degree rather than a fundamental behavioural difference.

- ▶ There are major differences between commercial-scale publishers and merit publishers:
 - the merit publishers are mainly small companies, are Canadian controlled, and, together account for about one-tenth of total trade book sales.
 - merit publishers focus on Canadian-authored titles, they publish a limited number of Canadian editions of foreign authors, and rarely handle imported agency lines.
 - merit publishers publish some 55% of new Canadian-authored titles, and hence play a major role in publishing Canadian authors.
 - although the companies are small, merit publishers account for some 35% of total Canadian-authored trade book sales.

F. Types of Canadian-authored trade books published by commercial specialists and movement of authors

As will be seen in the next chapter, one of the themes of our interview results is that the large, commercial-scale trade book publishers, both Canadian- and foreign-controlled, are focusing increasingly on books of commercial appeal in the marketplace. While some literary titles are published, this genre of books tends to be the domain of the smaller literary presses.

A second theme of our interview program is that there is considerable movement of authors among larger publishers in Canada, which, in part, is due to the influence of literary agents. Movement of authors is associated with financial considerations as well as with reasons related to professional standing and artistic concerns.

In this section, we present the results of an analysis of the Canadian-authored trade book titles published in 1990 by 10 large Canadian- and foreign-controlled publishers. The titles were identified by obtaining the fall catalogues produced by the publishers (note, the fall catalogue may exclude some titles released at other times of the year). The following two issues were examined:

- ▶ What types of Canadian-authored trade books are published by these large publishers? Are there any major differences in the nature of books published between Canadian- versus foreign-controlled publishers? What portion of these titles could be considered as "culturally significant"?

- ▶ What is the publishing history of the authors who published a book in 1990 with these large publishers? For example, do authors tend to start their careers with small Canadian publishers, or, do they tend to publish their first books with large commercial publishers?

Of the group of ten publishers examined, six are Canadian-controlled:

McClelland & Stewart
Macmillan of Canada
Stoddart
Harper Collins Canada
Doubleday Canada
Douglas & McIntyre

The four foreign-controlled publishers examined were:

Oxford University Press
Penguin Books Canada (Viking Canada)
Random House of Canada
McGraw-Hill Ryerson

We adopted the Statistics Canada definition of trade books, which excludes cookbooks, gardening books, how-to books, and other books which are usually classified as general reference books. We also excluded children's and young-adult books. Only new titles published were considered (not reprints and second editions). The focus was on English-language titles and authors (and their publishing histories), so Francophone authors were excluded. Finally, of course, the examination focused on Canadian authors. (Note, the nationality of the author is not usually identified in the catalogue. We relied on the National Library of Canada's cataloguing database (discussed later in this section) to determine nationality.)

1. Nature of trade titles published

As shown in Exhibit 4, the group of ten large publishers listed some 107 new trade book titles in their 1990 fall catalogues. The six Canadian-controlled publishers were more active than were the foreign-controlled group, responsible for 71(66%) of the 107 titles. The greater emphasis on Canadian authors of Canadian-controlled publishers compared to foreign-controlled publishers was noted earlier.

Among the Canadian-controlled group, the most active publishers were McClelland & Stewart, followed by Stoddart and then by Macmillan of Canada. Among the foreign-controlled group, McGraw-Hill Ryerson and Penguin/Viking had the most titles.

Looking at the subjects published, the most common were fiction, sports/recreation, biography/autobiography, history and humour. The least common included literary criticism, poetry and travel.

Exhibit 4
Number of English-language, Canadian-authored trade titles published in 1990, by subject category and country of control of publisher*

	Fiction	Literary Criticism	Memoirs	Poetry	History	Business	Social Sciences	Politics/ Current Affairs	Ecology /Nature	Cdn. Art/ Architecture	Biography/ Autobiography	Religion	Fiction - Mystery	Fiction - Humour	Recreation/ sports	Travel	General Interest	Total #	%
Canadian - controlled																			
McClelland & Stewart	7	-	-	-	4	-	3	3	-	1	1	-	-	2	3	-	-	24	22
Stoddart	2	-	2	-	1	1	2	-	1	1	3	-	-	4	-	-	1	18	17
Harper Collins Canada	1	-	2	-	-	-	-	-	-	-	-	-	1	-	-	-	-	4	4
Doubleday Canada	-	-	1	-	-	-	-	-	-	-	-	-	1	-	-	1	-	3	3
Macmillan of Canada	1	-	-	-	-	1	-	-	-	-	2	-	1	1	3	-	-	9	8
Douglas & McIntyre	-	-	-	-	2	1	-	1	3	1	2	-	1	-	1	1	-	13	12
Sub-total #	11	-	5	-	7	3	5	4	4	3	8	0	4	7	7	2	1	71	66
%	16	-	7	-	10	4	7	6	6	4	11	0	6	10	10	3	1	100%	-
Foreign - controlled																			
Oxford	2	-	1	1	-	-	-	-	-	1	-	-	-	-	-	-	-	5	5
Penguin/Viking	4	1	-	-	2	-	-	1	-	1	-	1	2	1	1	-	-	14	13
Random House of Canada	-	-	-	-	-	-	-	-	-	-	2	-	1	-	-	-	-	3	3
McGraw-Hill Ryerson	-	-	-	-	1	3	-	2	-	-	1	-	-	-	5	-	2	14	13
Sub-total #	6	1	1	1	3	3	0	3	-	2	3	1	3	1	6	-	2	36	34
%	17	3	3	3	8	8	0	8	-	6	8	3	8	3	17	-	6	100%	-
Grand total #	17	1	6	1	10	6	5	7	4	5	11	1	7	8	13	2	3	107	100%
%	16	1	6	1	9	6	5	7	4	5	10	1	7	8	12	2	3	100%	-

* Note: The titles were taken from each publisher's fall catalogue, and in certain cases may exclude titles published at other times of the year.

The interests of the Canadian-controlled group compared to the foreign-controlled group are quite similar. The only major difference is that foreign-controlled publishers published a relatively greater percentage of sports books.

We also examined the group of titles in terms of their "cultural importance." The next chapter presents and discusses a definition of this term, which is "titles which foster the act of understanding and interpretation, of ourselves, or our relations between ourselves and each other and to the world around us, essentially of how we see ourselves." Taking this definition, it is clear that this group of large publishers is interested in publishing these sorts of "serious" books. If we group together the titles that fall within the subjects of: fiction, literary criticism, memoirs, poetry, history, business, politics/current affairs, social sciences, ecology/nature, Canadian art/architecture, and biography/autobiography, then some 69% of the large publishers' trade titles could be considered as "culturally important."

2. Author movement

We then examined the publishing histories of the authors who published the 107 trade titles referred to above. Using the National Library of Canada's on-line cataloguing database (DOBIS), we identified all the titles previously published by each author, along with the name of the title and publisher and date of publication. We then recorded this information for the *first title* published by each author.

Exhibit 5 contains the results. The table indicates that 17% of all 107 titles were actually the author's first and only book to date. Another 20% of authors had their first title published by the same publisher, e.g., an author who published a book with McClelland & Stewart in 1990 also published his first book in 1970 with McClelland & Stewart.

The third column in the table indicates that 25% of all authors had published their first book with another large publisher in Canada. This indicates a fairly significant degree of author movement among large publishers, a subject which is further explored in the next chapter.

Of the authors who were published in 1990 by the group of large commercial publishers, 62% had their first book published by one of these large publishers. The same finding applies both to the Canadian- and foreign-controlled groups. This would indicate that large publishers are interested in publishing new authors. There are likely a large number of explanations for this. For example, some of these new authors have commercial appeal because of their celebrity status (e.g., journalists), a topic we discuss further in the next chapter. Also, some of the Canadian-controlled publishers likely received Canada Council funding to publish eligible books by Canadian authors.

Some 24% of authors had started out with a smaller publisher in Canada. This rather small percentage might be somewhat surprising. The percentage is slightly higher

Exhibit 5
Authors with titles in 1990: types of publishers which published author's first title

	Same Publisher - First Title	Same Publisher - Previous Title	Other Large Publisher in Canada	Other Smaller Canadian Publisher	Publisher Outside Canada	Total
Canadian-controlled publishers						
Number of titles	13	11	20	19	8	71
Per cent	18	15	28	27	11	100%
Foreign-controlled publishers						
Number of titles	5	10	7	7	7	36
Per cent	14	28	19	19	19	100%
Total						
Number of titles	18	21	27	26	15	107
Per cent	17	20	25	24	14	100%

Example: Of the authors who published 71 titles with Canadian-controlled publishers in 1990, 11 (15%) had their first book published with the same publisher.

for Canadian-controlled than for foreign-controlled publishers. The topic of author progression from small to large publishers is also discussed in the next chapter.

Finally, about 14% of authors had their first books published by a publisher in another country (usually the U.S.). The percentage is slightly higher for foreign-controlled publishers than for Canadian-controlled publishers. Some of these authors were born in other countries and had moved to Canada at some point to continue their publishing careers.

The reader is cautioned against making generalizations based on the data contained in the table. Further research would be required in order to fully analyze the trends in author movement and their causes. This could be done, for example, by taking a sample of Canadian authors and examining their complete publishing histories. Then, based on discussions with the authors and with their publishers and agents, one could undertake a more complete analysis of the subject.

VI

Interview Findings

In this chapter we present the results of our interview program with respect to the issues that were addressed by the study. The chapter is organized according to the following topics:

- A. Definition of "culture."
- B. The industry context.
- C. Roles of agents and publishers in developing authors.
- D. Development and movement of authors.
- E. Impacts of publishing services and functions on authors.
- F. Role of agents.

A. Defining "culture"

There are many definitions of the word culture. At one extreme it refers to the familiarity of an individual with the fine arts and humanities, a "cultured person." At the other extreme, culture is used to describe the customary beliefs and social forms of a nation, the "national culture."

In this study we have chosen a definition which seems to encompass the usage of those working in the cultural agencies and cultural industries.

When speaking of writing and publishing activity as "culturally important" we have in mind, for the purposes of this study, works which "foster the act of understanding and interpretation, of ourselves, of our relations between ourselves and each other and to the world around us, essentially of how we see ourselves"¹. Another way of describing such books would be to define them as books which engage in some act of creative or critical interpretation.

¹ *Justin Wintle, Makers of Modern Culture, London, 1981.*

In the trade sector this would include books of social comment, history, biography, books exploring and elucidating scientific disciplines such as mathematics, astronomy, biology etc., but intended for the intelligent general reader. Also included, of course are poetry, essays and literary fiction.

B. The industry context

In investigating the influence of the literary agent in Canada, the movement of authors within the publishing environment, and the respective roles of publishers of differing kinds in developing authors, we quickly became aware of three issues, which coloured much of what we heard:

- ▶ The impact of cultural subsidies on smaller publishers and the way in which such subsidies can be interpreted as distorting the "normal" publishing imperatives relating to profit and loss.
- ▶ The high degree of skepticism among many individuals in the Canadian-controlled sector of the industry regarding the motives of some of the foreign-owned publishers in establishing Canadian lists.
- ▶ The current financial instability of much of the Canadian-owned sector of the industry.

In the first case, discussion regarding present forms of government aid to authors and publishers is inevitably bound up with much larger considerations of foreign ownership, and the overwhelming presence in the Canadian book market, of foreign, mostly U.S. books. These are subjects beyond the scope of this study. However it is clear that current government assistance to Canadian publishers is widely perceived as an essential interim measure until some more radical restructuring of the Canadian marketplace brings relief. As to what form this ultimate solution ought to take opinions differ.

Regarding the skepticism displayed toward foreign-owned publishers, it is impossible to say whether it is well founded or not.

Without being privy to the actual financial return on Canadian publishing programs in question, and to the corporate thinking behind them, no absolute conclusions are possible. The most one can say is that for companies like Random House, and Penguin Books, their Canadian publishing program represents a substantial investment. The Canadian management and editorial staff of these companies are well known and respected. The assumption must be that a serious, long-term, profit-oriented, publishing effort is being undertaken.

Whether or not some admixture of corporate public relations is present is pure speculation, and beyond reflecting, where it seemed appropriate, the views gathered in interviews we have regarded the issue as outside our scope.

With reference to the current economic state of Canadian publishing, this is a deeply troubled time for the industry and much concern, even despair, is evident in discussions touching on its future. This pervasive atmosphere of financial crisis clouded the discussion of issues. We have attempted to allow for this in our report by assuming the existence of some status quo in the condition of the Canadian-owned publishers. However, if for example, the financial problems of Canadian publishers should worsen in the immediate future, considerations such as the development or otherwise of Canadian authors by smaller, and even some larger, Canadian publishers could become academic, since it seems likely that they would cease publishing altogether.

C. Roles of agents and publishers in developing authors

Upon investigation, the phrase "developing authors", in the sense of "do agents and publishers develop authors", reveals some ambiguities.

If we understand the phrase to mean "assisting an author in realizing his/her full potential" the question immediately arises: potential as what: as writers, or as saleable authors?

Some authors are deeply, if not exclusively, concerned with their development as writers. Their craft is paramount. Others have an eye firmly fixed upon sales and the best-seller lists and although concerned about their skills in writing, are only so to the extent that greater facility can enable them to write more marketable books.

A best-seller may be well or poorly written according to those who presume to judge literary merit. On the other hand, the history of literature is replete with examples of books, now considered masterpieces, which upon publication sold only a few copies. Indeed this fact is one of the main supports of writers whose work has not yet been able to find an appreciative audience.

Upon concluding our interviews it was clear to us that a primary skill among literary agents is the ability to balance successfully these considerations of marketability and commercial potential, against the author's concern with quality where it exists.

Agents present ideas to publishers, sell manuscripts to editors, "clean-up" poorly presented manuscripts, and spend much time in ongoing discussions with the author regarding the progress of a manuscript, satisfactory or otherwise. Authors are invited to consider new departures in writing if an agent sees an opportunity to employ their talents more profitably. An aspiring novelist may have the writing skills to produce a needed book on some timely non-fiction subject, and an agent can bring this about to the advantage of both.

There seems no doubt that writer and agent working in concert can provide more opportunities for publication than most writers are able to do for themselves. It is also the case that writers are better rewarded for their work since the appearance of agents on the publishing scene.

Canadian literary agents know how to be tough—as intermediaries they would not be much use otherwise. Their strong suit is attention to detail. Businesslike, regular, royalty statements are now the norm among publishers with whom agents have to deal. Manuscripts are dealt with by publishers much more promptly than used to be the case in pre-agent days.

Publishers acknowledge a benefit too. Agents act as a filter on the number of manuscripts a publisher must deal with. Publishers now expect to receive well prepared, edited, manuscripts from agents. Fewer and fewer of the larger publishing houses are prepared to accept “over the transom” or unsolicited manuscripts other than via an agent. Indeed, many no longer maintain the staff to deal with casual manuscripts.

In other ways too, the publisher and editor benefit. When an author has an agent, business and creative concerns can be kept separate. Writers deal with editors on creative matters and the agent deals with the appropriate in-house person on matters pertaining to advances, royalties, rights, etc. Furthermore when writers must be rebuffed by publishers, the agent is there to be dealt with on the authors behalf, so that sensibilities are protected and embarrassment avoided.

Established authors too will sometimes decide that they need an agent to relieve them of what English author Walter Besant called “. . . the intolerable trouble of haggling and bargaining.” Having acquired an agent the author may soon find him or herself with a new publisher and better terms, due to the agent’s efforts.

An agent must always have an author’s interest clearly in view: as authors earn, so do agents. At the same time, agents must attempt to maintain good relations with publishers. An agent has many authors to think about and must always consider the possible impact of a particular negotiation upon a whole range of negotiations, present and future.

At some moment both the author and the agents interest may require the agent to find a new publisher for a writer. This is not uncommon and such moves must be contrived with as little residual ill-feeling as possible. Agents have undoubtedly contributed to the increased movement of authors among publishers. They have made it possible for writers to be more apt and able to pursue their own interest—even to the extent of changing publishers. Agents provide the continuity of relationship which authors seek, and lessen the potential dislocations which accompany such changes.

Ultimately the market determines the behaviour of agents, just as it does of writers and publishers—even of marginal writers and subsidized publishers. Curtis Brown, an American who practically invented the activity of literary agent, remarked in 1935

. . . authors can be divided into two classes: first those whose work the publisher doesn’t particularly want; and second, those whose work the publisher does want, or would want if he knew of it; and it is only with the second class that a sound literary agent has, or should have, to do. Unless an author’s work gives decided promise, he is of little interest to the publisher, or to the first class agent. The only agent who really counts, either for the author, or with the publisher, or with his own banker, is the one who sells the kind of work for which publishers are in competition,

and who takes advantage of that competition to get the best price for the author.¹

Agents have usually insisted upon handling all of a writer's output. The exceptions are major writing names who may have different agents to handle different aspects of their work. Increasingly, another exception is in the case of fiction and poetry. Agents are standing aside and letting writers make a deal, if they can, with a smaller publisher who is able to obtain subsidies for this kind of publication and who may sell only 500 to 1,000 copies of such books at best.

The agent's view is that there is not enough money involved in these transactions to make them worthwhile. An author may publish a novel in this way and achieve a critical success with 1,000 copies, without garnering any significant-monetary reward. Certainly there is nothing in it for an agent. Consequently hardly any agent activity takes place at this level of publishing.

Authors and agents agree that many of these smaller houses are able to produce good looking, well designed books. Some are even able to place as many copies with bookstores as a larger publisher would initially be able to do. Promotion, to the potential reader, however, is weak and most books published in this way have to rely upon their presence alone to attract buyers.

D. Development and movement of authors

1. Movement of authors

Authors move around within the publishing community in Canada as elsewhere. This movement of authors in pursuit of more money or a more congenial publishing environment, is an almost universal phenomenon throughout the writing/publishing world. Certainly, in the United Kingdom and United States where similar market systems operate, there have always been plenty of mobile authors.

U.S. and U.K. small publishers who have an author on their list who is published by a major publisher, will frequently promote their books to the booksellers and public, drawing attention to the fact that they have other titles by the "new" author.

In a sense, the publication of their author by a major publisher will increase the value of a small publisher's inventory of the authors earlier books by creating public interest and making them more saleable.

U.K. small publishers particularly, rarely if ever remainder their books for just this reason, believing that an author may break out into the bigger leagues and revive interest in his previous books.

¹Curtis Brown, *Contacts*, London: Casell, 1935.

To enumerate all the specific reasons why a Canadian author might wish to change publishers would be impossible, but generally such moves are a function of a change in relationship between authors, agents, and publishers. Among the people we interviewed there was agreement that the advent of agents on the Canadian publishing scene has meant increased author movement. Some of these moves have been associated with money, some with reasons more related to professional standing or artistic concerns.

As reported in Chapter II, in recent years the number of larger publishers engaged to any significant degree in general trade publishing in Canada have numbered around 20—usually less. Of these, less than half have been Canadian-controlled.

It is these larger trade publishing houses which are in competition for popular Canadian authors, and the authors they compete for most intensely, are the proven and celebrity authors and authors capable of producing popular books on subjects of general interest, handled by agents. Literary authors also appear on the lists of large general publishers in Canada but are not so sought after and are certainly the most vulnerable to rejection in periods of economic difficulty like the present.

It is possible of course to be both literary (in the sense of being a critical success) and popular. Canadian examples which spring immediately to mind are Margaret Atwood and Alice Monroe, both authors internationally acknowledged as being “serious” writers yet also best-sellers in paperback to readers without any particular pretensions to elevated literary taste. When such an author is also a celebrity, as in the case of Ms. Atwood, the combination is formidable indeed and one much sought after by publishers.

Most “literary” writers are not so fortunate however, and most of the publishing of novels, poetry, essays etc., is carried on at a much more modest level.

Many Canadian authors, especially of fiction and poetry, begin their publishing careers with one of the 70 or so small publishers scattered across Canada, and continue to publish if not with the same firm, then with a firm of similar size and characteristics. They are published in editions of 1,000 to 1,500 copies usually, except for poetry which will probably number only a few hundred copies. Some others move on to larger publishers—though not always to much larger editions or sales.

Many successful authors continue to publish with more than one publisher simultaneously throughout their writing career. Different aspects of a writer's work, popular non-fiction, novels, poetry, children books, may require a different kind of publishing, and authors and their agent recognize this. Sometimes a combination of smaller and larger publishers are utilized to publish the full range of an author's work.

2. Support of Canadian-authored titles

The publishing situation and the movement of authors in Canada is complicated by features which do not exist elsewhere—at least not to the same extent relative to the size of the marketplace.

A major one is the existence of granting agencies which make possible publishing activity which would otherwise be non-viable. The existence of funding by both federal and provincial governments intended to bolster the publication of works deemed culturally important is a significant factor in how and why many writers get published.

Since the purpose of subsidies (some of which are directed at the writer, some at the publisher) is to enable the publication of works which are, in the view of the publisher, culturally worthwhile but of doubtful profitability, the presumption must be that without access to subsidies most of these works would not be published. This being so, it is understandable that many writers spend their careers within the subsidy cocoon, sometimes with a variety of publishers, but without ever selling more than a few hundred copies of any of their books.

This is no comment on the worth of these authors as writers, or on the literary value of their works, it simply reflects the hard facts of the marketplace. The essential point is that, whatever the cultural value of much of this activity, it is irrelevant in terms of the commercial publishing marketplace.

Canadians simply do not buy many such books. It is not possible to develop most of these authors commercially, in the sense of enlarging their sales book by book, until they achieve a prominence as writers which ensures them a living and their publisher a profit.

They may develop as writers, improving their skills and becoming better at what they do, more able to convey to the reader what it is they wish to communicate. Such development may bring critical acceptance but is unlikely to bring any marked financial improvement or the opportunity to move out of the small publisher sphere.

The difficulty of discussing author movement and development at all in the context of Canadian publishing arises from the critical role which subsidies play in the operation of smaller Canadian publishers who produce culturally significant works. For many of them the publication of such authors is the only means by which they can exist. Such activity is not—as it might be elsewhere—the designation of monies earned by other more profitable publishing activity, toward the “worthwhile” or altruistic purpose of introducing Canadian authors to the marketplace. Rather, it is their *raison d'être*.

The publishing context is not one in which earnings are invested in risky, but culturally important publishing, in order to enhance a list or take a profit later when an author has developed an audience large enough to be profitable. The context for many of these publishers and their authors is rather one in which it is only possible to publish at all because of subsidies. Many of these firms operate unprofitably

even after subsidies are taken into account. As one publisher, notable for a long record of such publishing has remarked “. . . you know you’re going to lose every time out.”¹ So although many smaller publishers continue to publish authors they believe in even though they remain unable to achieve sales of more than a few hundred copies, this is more author maintenance than author development in any market sense.

Some of the same funding we have mentioned is also available to larger more commercial publishers which are Canadian-controlled, and most make use of it to add books to their lists which might not otherwise be possible. When literary authors do leave the ranks of smaller literary presses for publication by larger houses, a few blossom forth as commercial successes, others continue to sell in numbers not greatly different from their small press experience, but often remain on the lists of larger publishers for reasons of critical prestige and by virtue of the subsidies which enable their publication.

Some authors must move up if they are to realize their potential for sales. Without the promotion and distribution available from larger, better financed publishers, they cannot reach their full audience. For other authors it appears to make no difference. If their subject matter lacks wide appeal, more promotion and more distribution, are unlikely to improve sales. In such cases, a good small publisher can market the author as effectively as a larger one—perhaps better. Many authors feel this and point out that a writer may be more comfortable and productive with a smaller publisher where his/her work is the object of more understanding and individual attention, both at the creative stage and in marketing and promotion into what might be quite small markets.

3. Comparing Canadian-owned with foreign-owned publishers

Of the larger publishers, not only Canadian-controlled ones engage in publishing Canadian authors. Foreign-owned houses, like Penguin Books Canada and Random House, have very respectable Canadian lists, created without benefit of subsidy. They compete directly with Canadian-controlled publishers for authors, and a common complaint has been that due to their privileged position as the well-financed arms of internationally powerful publishing conglomerates, they enjoy an unfair advantage in this regard.

In discussing author movement and development among these firms we also face a difficulty. The mere fact of pressure emanating from agencies of government which have the means to render life difficult for these large foreign-owned companies can distort the publishing process. The federal government’s Baie Comeau policy, with its requirements regarding divestment, and negotiations between agencies and publishers regarding the extent to which compliance will be sought under this policy, has been suspected of provoking a flurry of “culturally positive” activity on

¹ Michael Macklem, *Love and Money*, Oberon Press, 1980.

the part of targeted publishers. Such certainly is the view of many observers within the industry.

When large sums are negotiated with agents by such companies to acquire high profile Canadian authors, many wonder whether the activity is publishing activity or political activity. Does it indeed matter which it is? If foreign-owned companies can be encouraged by whatever means to expend resources publishing and promoting Canadian authors, these authors, and their agents, are unlikely to complain. Canadian publishers in competition for authors might take a different view.

What is significant about these state interventions is that they introduce wholly non-publishing elements into considerations of authorship and publishing.

In the one case, a publishing culture has grown up for certain kinds of Canadian writing based upon a system of grants and subsidies. The activity of a very large number of Canadian publishers, perhaps most, is only possible because of this. Any faltering in this complex network of federal and provincial support would promptly reduce most Canadian publishing to rubble.

In the case of foreign-owned publishers, if their motives in acquiring Canadian writers for their lists are, as many suspect, questionable—more related to political considerations than to a commitment to developing authors or fostering Canadian culture—it might be expected that much of the publishing activity under examination would not long survive any lessening of the pressure which produced it.

On the other hand the possession of a Canadian list has long been acknowledged to be of value to any agency publisher, foreign or Canadian-controlled. Having such a list helps to sell imports, makes a publisher's representative more welcome in bookstores and gives a firm's Canadian presence credibility.

Publishing houses like Penguin have made a practice of developing national lists in countries where they have distribution arrangement for their books. Such programs allow agent-publishers to develop an area of autonomous activity over which they can exercise control and to be more than merely wholesalers of agency titles.

If we accept that much of the more culturally-significant literature (serious fiction, poetry, biography, comment) is precisely the most marginal in economic terms, and most in need of subsidy support and commitment, we can expect it to be the first to go in financially troubled times. This would be true regardless of ownership.

Some we interviewed claim that there is already evidence of this as larger firms, both foreign-owned and Canadian, more and more display a preference for "celebrity" and popular books in a currently difficult publishing market.

It seems likely that the great majority of Canadian writers will always be introduced to authorship by the large number of small subsidized publishers. This is especially

true of literary writers whose books will in general achieve only modest sales and reputation among the reading public, though their reputation may be high in some particular regional, social or cultural context.

Increasingly, however, commercial authors—in the sense of appearing in the judgement of agents and publishers as being saleable—are likely to start nearer the top in terms of publisher size.

In order to be noticed by a major publisher—Canadian or foreign-controlled—a writer needs an agent. If in the agent's judgement a work is saleable, only larger publishers will be approached. Once established in the marketplace an author and his/her agent can then regard each new manuscript as a matrix of opportunity around which the best deal possible, in terms of money and career advantage, must be constructed. This is the particular skill of the successful agent.

Although this activity may be within the context of a relationship with a particular publisher, rather than a number of publishers, it is certainly author development in the author/agent context. In order to be the beneficiary of it however, an author must have either a track record which appeals to a publisher and agent or some evident saleability from the outset of their relationship.

Large publishers and the agents they deal with require bankable properties, authors who are promotable and whose style and subject matter are capable of communication to large numbers of people. Ideally they should also be celebrities whose fame assures them a measure of media attention.

A suitable summary motto for this period of economic and political uncertainty in Canadian publishing comes from one editor-in-chief of a large foreign-owned house with a Canadian list, "... fewer books and more profitable books."

E. Impacts of publishing services and functions on authors

Describing the way in which the various component publishing services and functions (what publishers do and how they do it) affect the behaviour of agents and their authors will necessitate some repetition of matters dealt with in the previous section.

Our approach has been to take the major publishing services and functions and to examine them using three different perspectives: that of publisher, agent and author.

No pretence is made to scientific method. Nothing could be less scientific than the ways in which much general trade publishing is carried on. The keys to successful publishing are in the editorial/acquisition functions and the marketing/promotion functions. By common acknowledgement, editing is such an intangible skill, that it challenges analysis. The marketing and promotion of trade books, beyond the simple and not always very effective methods of print advertising and targeted marketing, (advertising books of medical interest to doctors, biographies of business tycoons to executives) is so inherently difficult and so little researched, that an abundance of completely contrary opinion exists

on the subject. We have attempted to wend our way through this maze by focussing on those aspects of the subject where some measure of agreement exists among the people we interviewed.

The publishing services and functions examined are:

- ▶ Marketing and promotion, including sales force.
- ▶ Pricing and positioning of a title.
- ▶ Relationships between hardcover publication and paperback publication.
- ▶ Foreign rights and subsidiary rights.
- ▶ Financial dealings amongst publishers, agents, and authors.
- ▶ Distribution and fulfillment.

The perspectives we have applied, where appropriate, are those of:

- ▶ Publisher.
- ▶ Agent.
- ▶ Author.

Before proceeding, two definitions are necessary. We define "marketing" to be the investigation of the possible demand for goods, and we define "promotion" to be the means by which a demand once identified is encouraged and stimulated. In fact, in the Canadian trade publishing sector, the two terms are often used interchangeably, due probably to the virtual impossibility of exploring the demand for a particular book effectively by any affordable means.

1. Small publishers

a) Marketing and promotion

Smaller Canadian publishers of the kind we have discussed in relation to government assistance and their role in introducing new authors into the, albeit limited, marketplace rely heavily upon traditional methods of promotion. The Literary Press Group (L.P.G.) for example, a group of 25 of the most important small publishers in terms of the issues we are examining here, distributes to bookstores and libraries in Canada about 2,000 copies of each publisher's individual catalogue annually, a total of 50,000 catalogues. In addition some 10,000 catalogues, containing a selection from each publisher's list, are distributed to bookstores and libraries in the U.S. each year. Displays are mounted at all the major bookseller trade fairs, both regional and national, at Canadian library conferences, and at selected U.S.

bookseller and library gatherings. Some print advertising is done in literary magazines and trade journals such as Quill and Quire and Canadian Bookseller.

Individual publishers take initiatives as opportunities present themselves locally or regionally, but catalogue distribution and displays are the essence of small publisher advertising. All this promotion is, of course, directed only to the trade. So far no affordable means of promoting direct to consumers has been realized. What this activity has done in recent years is to increase the presence of L.P.G. books in bookstores where the reading public can examine them.

Apart from the sales effort described above, a major factor in the increased acceptance of these books by booksellers has been due to the marked improvement in the appearance of books issued by small publishers generally. Great improvements have been made in book design and cover design particularly.

This improved appearance and durability of small press books is due in large part to the existence of the Banff publishing school in Banff Alberta. In the ten years since its foundation, about 400 students have attended Banff's intensive publishing course and most seem to have remained in publishing, many with small presses. The exposure of these students to some of the best brains in Canadian publishing has undoubtedly raised the level of what is acceptable and achievable, even with limited resources, in book design and production.

b) Sales force

In regard to selling into bookstores and libraries, small presses are severely handicapped. Salesmen are an expensive item on any publisher's budget and the smaller the list to be sold, the greater the relative expense.

The 25 small publishers who comprise the L.P.G. have attempted with some success to meet this problem by creating a shared sales force. Although comprising only two individuals it has already shown some results. It is too early to judge how effective this approach will prove to be in helping to maintain inventories of L.P.G. books in retail book outlets, although the group is optimistic. Other small publishers have their books represented to retailers and libraries by independent sales forces across Canada. Orders are consolidated as part of cooperative distribution arrangements.

c) Pricing

The main difficulty small publishers claim to face in pricing their books is the high per unit cost forced on them by small edition sizes. This would matter less if their customers were not conditioned to retail price levels set by largely U.S. imports. These U.S. prices are, of course, arrived at using unit costs

based upon edition sizes that are five, ten, or twenty times the size of Canadian ones. However, to say only this is to over simplify the issue. The price of books in the marketplace is influenced by many factors:

- ▶ The exchange rate between currencies.
- ▶ The kind of deal a Canadian agent has been able to negotiate with his principal regarding his buying cost.
- ▶ The numbers of a title which a publisher feels some assurance of selling in the period following release.
- ▶ The extent to which books may be priced on the basis of "what the market will bear", rather than in relation to costs of purchase and distribution in the case of agents, or cost of production and distribution in the case of publishers.

There are undoubtedly other factors affecting book prices in Canada which closer examination of the subject would reveal.

It is true, however, that the prices of Canadian produced books is determined in a general way by the price of all the similar products in the marketplace, whether imported or domestic.

One must suppose that consumers are generally unwilling to pay more for books simply because they are Canadian. On the other hand, they no longer seem to feel that Canadian books are somehow worth less than competing books from the U.S. or U.K.

In a very real sense, books on leisure, entertainment and information have to be competitive with other means of attaining these ends. Videos, movies, the cost of equipping for a sport, and many other elements in the marketplace help to determine in the consumers mind a "comfort level" with the price of the different kinds of books available. This is true almost everywhere books are sold. In places where publishers (as those who determine the price of books) stray too far from the awareness of this fact of consumer perceived value, retribution in the form of declining sales (as in Britain during the early 1980's) is not long in arriving.

Recent innovations in the technology available to bring books to the press stage, (the point at which they go to print,) have eased somewhat the burden of preparation costs. Many of Canada's smaller publishers, aided by government funding, have, for some time, been making use of desktop publishing techniques to prepare books (larger publishers, less flexible in their systems or thinking perhaps, are more slowly adopting similar techniques.)

In the consumer marketplace, most kinds of books, certainly trade hardcover, trade paperback, and mass market books, are pushing up against the

acceptable upper levels of price at present. This is a problem for publishers of all sizes, but it is fair to say that smaller publishers feel the burden of consumer resistance more acutely, mainly due to their collective lack of well-known writers and famous names to aid in selling their books, as well as other elements of effective promotion to consumer.

For smaller publishers, mass-market publication of their authors is not a subject which consumes much time or energy. By definition, an author published by a small subsidized press with hardcover sales of between 800 and 1,500 copies is not mass-market material.

Trade or quality paperbacks are another matter, and small press books frequently appear originally in trade paperback, bypassing hardcover altogether, or binding up the same sheets into boards for libraries and institutions.

Some trade paperbacks can be equally as appealing as a hardcover edition, and if constructed in a way to ensure durability, can capture the hardcover market for a title, and go somewhat beyond in terms of numbers. Retail prices can be up to two thirds what the price of a hardbound copy might be.

The saving to a publisher in binding a book in paper rather than hardcover is not always great. With many true quality trade paperbacks only cloth binding costs are saved; but since the market is likely to be extended there is a net gain. The majority of small press publication in Canada—and probably elsewhere—is in trade paperback. The design of such books has been brought to a very high standard.

d) Foreign rights and financial dealings

The situation in respect to the acquisition and use of foreign rights by smaller publishers is rather confused. It has been usual for authors at this level to surrender all rights to their work. Dealing largely without benefit of agents to represent their interests, beginning authors, or those who pursue their careers entirely among the small publishing community, tend not to be too concerned about foreign rights and residual rights generally. Frequently their ambition extends only to being published in Canada—in itself hard enough to achieve.

For writers who find some success, contact with more widely-published writers, and maybe the acquisition of an agent, will increase awareness of these matters.

It is impossible to generalize. In this, as in many other ways, small publisher behaviour varies widely. Some exhibit interest in foreign rights by attending foreign book fairs as part of a government-funded Canadian publisher collective effort, while others do not. According to reports, payment to authors by some publishers are exemplary, by others abysmal. For many of

these publishers and their authors financial dealings in regard to actual earnings from sales are on a very modest scale.

e) **Distribution and fulfillment**

Distribution, like many other matters to do with books, exhibits particular difficulties in Canada not evident elsewhere.

Those engaged in the book industry everywhere grapple with the same fundamental problem of dealing in a product which is produced in thousands and sold one at a time.

Due to the unique nature of books in civilized societies, and the historical and cultural context in which they are embedded, many of the problems surrounding book marketing promotion and distribution are sociological as much as economic.

This is perhaps particularly true for many small publishers, much of whose product is seen as "serious", "culturally significant" or "important", even "difficult" and "elite". For such books, likely to be sold in the numbers they are, no very elaborate or expensive individual system of distribution by the publisher is likely to be affordable.

Canadian small publishers have been fortunate in being able to organize a number of co-operative distribution arrangements—such as that with the University of Toronto Press—which looks after fulfillment and billing for about 30 small publishers, and seems to work well. Other similar arrangements exist.

In the U.S., arrangements with wholesalers specializing in small press distribution are yielding results for small Canadian presses. In this way, small publishers attempt to give their authors some U.S. exposure when the selling of rights is impossible.

Without more money it is difficult to know what else smaller publishers can do to promote and distribute their products, or to give their authors more exposure. Certainly, at present, among the owners and operators of small literary presses, the level of commitment to publishing their rather specialized books in the most attractive way possible is high.

2. **Larger publishers**

a) **Marketing and promotion**

There seems to be no essential differences in the **intentions** of larger general trade publishers toward marketing and promotion, which can be related to ownership. Obviously, publishing houses which enjoy better levels of financing have the option of spending more in these areas when required.

Since the foreign-owned publishers are in general more fortunate in this regard some differences might be expected. There are, however, no startling differences in the appearance or frequency of such basic materials as catalogues, posters, etc., or indeed in the composition of the list of such publishers.

It would seem reasonable to suppose that some economies must be available to Canadian branches of foreign firms. Since they are selling the same product as their principals, the cost of catalogue art work and materials, such as posters and mailing pieces for such products, might be beneficially affected, however; this would clearly not be true for their Canadian books.

The quality and size of trade displays at book fairs and similar venues can differ a great deal among publishers. Size differences are, as a rule, related to company size and the number of books to be promoted. Big firms have big displays. However, innovation in these matters is mainly a function of individual enterprise by persons who have responsibility for such matters within firms, and quite small firms have won awards from the Canadian Booksellers Association, given in recognition of such enterprise.

While the appearance and physical quality of Canadian trade books often strikes one as better than that of imported U.S. books, there are no great differences between the domestic product of publishers of similar size. Though distinctly superior books appear each season, the honours are pretty evenly spread among publishers. This uniformity of production is at least partly a consequence of the fact that many such books, although bearing a Canadian imprint, are purchased as finished copies from independent book producers, located sometimes in Canada, and sometimes abroad. Such books are frequently printed abroad to standards set by the packager. On the whole the quality of such books is high by North American standards.

b) Sales forces

The trade sales forces of larger Canadian publishers are not remarkably different in their effectiveness. All perform basically the same functions of calling on retail outlets, attending at trade fairs, and providing feedback to their employers.

In Canada, with its widely dispersed centres of population, publishers of all sizes face a particular challenge in maintaining an effective sales force. Some have their own salesmen travelling the regions, some use independent organizations of book travellers who may represent the product of many publishers regionally, while others use a combination of both.

Although the sales managers of major publishers may be presumed to keep an eye on their employees' results, and to test the effectiveness of their efforts from time to time, no serious examination has ever been undertaken of the value of personal representation by book travellers in getting books into retail

stores and libraries. Book retailers know that some representatives are impressively efficient, others are insistent without being convincing, some are more annoyance than assistance. On the whole, the standard of book representation is probably as high in Canada as elsewhere in North America, but in an age of electronics, where text and images can be effectively transmitted at low cost, some feel that the role of the traditional book traveller is overdue for updating.

Personal relationships between representatives and buyers are still important in this area, as are similar relationships throughout an industry which still attaches a high value to personal contact. It no doubt sells many books into stores—though whether books “sell through” to consumers is a matter publisher representatives have little influence upon—but such considerations are waning every year. Most book representatives are kept busy—often seriously overextended in the busy fall selling season—and their basic role of attempting to make sure by personal contact, that their employers titles are in stock in stores, leaves little time for the development of innovative ideas for the promotion of authors and/or books.

c) **Publicity**

In the individual publishing houses, publicity and advertising often seem to be less important compared to other concerns. Very few Canadian publishers, of whatever size, list advertising or promotion as separate activities in trade directories. Mostly listings under “Marketing and Distribution” or “Sales and Marketing” is the closest one can come.

In conversation with staff of publishing houses it became clear to us that responsibility for the planning and execution of promotion and advertising for titles is often very diffuse. Much does not get done because it is not clear whose responsibility it is to do it. Innovation is difficult in such circumstances. One books follows closely upon another. The main selling season is a madhouse of activity, in which typically a few people attempt to organize an immense amount of detail on a crisis basis. Just keeping up becomes a goal. The easiest things to do are the most obvious ones and established contacts are the best.

Many publishers would reject this picture as biased and unfair, and no doubt it is inapplicable to the operation of some. Yet there are many with direct experience of working in publishing houses, who have moved on to other fields, who claim that promotion publicity and advertising functions in Canadian publishing are, in general, underpaid, undervalued, and often held in low regard.

Why this should be so is hard to say. What could be more important to a manufacturer or distributor than selling a product effectively? The description of some critics of publisher advertising and promotion seems almost too pessimistic, yet anyone looking around in the marketplace for evidence of

fresh ideas, either in the use of existing technology such as video displays, or truly attention-grabbing point-of-sale materials properly used, would find it hard to refute the critics.

One major publisher remarked that in his view the industry has been too long satisfied with selling its books to booksellers in ways unchanged, in essentials, for generations. It must now focus its attention upon developing ideas which will assist retailers in selling-through to their customers. Such ideas clearly look for cooperation between different levels of the book industry—authors, publishers, booksellers and others. The innovation we have identified as lacking may arise out of more discussion of this kind.

Indeed, innovation is, as we have attempted to indicate, lacking over the whole spectrum of book promotion. Faced with such a criticism, most publishers and booksellers would reply that if the accusation is true, the reason is lack of funds by which innovation might be financed.

Lack of funds is certainly a condition not uncommon in what is essentially a marginal industry. Still, a feeling seems to be growing among many concerned about the book industry's future that co-operation—among publishers of different kinds, and among various levels of the distribution system—is at least as lacking as money, and that the need for remedies to both inadequacies grows more pressing every year. Authors certainly feel this and are often highly critical of book promotion techniques employed by publishers, especially in cases where a sometimes onerous burden is thrown on the author by touring, and little other publicity is attempted.

d) Pricing

For both large and small Canadian publishers, the price of their product in the Canadian marketplace is set by imported, mainly U.S. books. These larger publishers are of course most frequently the agent-importers of such books. Indeed the argument is often advanced that the success and permanence of their Canadian publishing programs are to some extent dependent upon their success as importing-agents. Many have reservations regarding such claims, including some active publishers of Canadian books, both foreign-controlled and Canadian-owned. Certainly no objectively acquired data has ever been produced offering details as to how, and to what extent, agency revenues are injected into Canadian publishing. It would be difficult to substantiate such a claim from purely external data, observing the relationships between Canadian publishing programs and agency activity. It is a fact, however, that in cataloguing and presenting their own products to the book market, publishers must retain some acceptable relationship in the price, of their own books compared to that of similar imported product.

Controlling as they do the price in the Canadian marketplace of both their own books and the foreign books which they import, it might be assumed that a

certain amount of adjustment would be available to publisher agents to harmonize prices between the two different kinds of product.

However, a further consideration applies. All the product of any publisher-agent-importer is in competition with the product of all other similar companies. It is therefore difficult for a firm to stray too far from the norm in its pricing practices. This is not to ignore the existence of pricing opportunism in regard to a book with a high likelihood of being a popular best-seller due to its author, content, or prior proven track-record elsewhere. Such cases are not uncommon. Sometimes a book can support a higher-than-average market price, sometimes the strategy backfires and the expected sales do not develop. When this happens it is less important if the book concerned is an import since the front-end investment is less than in originating a book, or can in some measure be recovered by applying to the agent's principal publisher for relief by returning all, or a proportion, of the unsold copies.

It also seems likely that there are cases where a Canadian book which can be produced in a comparatively large edition (5,000-12,000) will actually cost-out at less than comparable imports. Observation of the marketplace tends to confirm that such books, even with a lower unit cost to the publisher, will still be priced using import established price levels, rather than a potentially lower retail. Authors have little to do with the establishing of prices for their books. Pricing and positioning a title are mainly publisher and sometimes agent responsibilities, to whom the author will usually defer.

e) Hardcover and paperback

To move an author from hardcover into mass-market paperback is the dream of many agents and publishers. Not all hardcover books are suitable for transfer into mass-market. Despite the apparent overwhelming presence of mass-market books in the marketplace, in fact, only a minute fraction of all the books published in Canada, the U.S., or U.K., achieve mass-market publication.

Nor is mass-market the only paperback option available. Quality or trade-paperbacks are now a feature of bookstore inventories. As we have seen, many such books emanate from small publishers and they are much in evidence in the sections devoted to novels, short stories, poetry, essays etc. in bookstores. But virtually all the other bookstore categories illustrate an explosion in the number of quality trade paperbacks being produced in recent years by all publishers.

In gardening and cooking, in self-help and child-rearing sections, trade paperbacks abound, many from smaller, frequently specialized publishers, but most from larger publishing concerns, either as reprints of earlier published hardcover titles, or as original publications.

Some trade books may appear in hardcover, then quality paperback, then mass-market—the three tiers of trade publishing—or in any two or three forms simultaneously. Many books are maintained in-print in all three versions over very long periods.

For Canadian publishers the ability to produce a Canadian author in mass market is acutely limited by the marketplace. The doorways to profitability in mass-market publication are low unit cost, wide distribution, high volume sales, an acceptable level of unsold returns.

The key to the first two essentials is the number of units over which the pre-publication costs can be spread, and the number of units which can go into distribution and establish a presence for the title on newsstands, in bookshops, and elsewhere.

The other two features of mass-market success, high sales and acceptable returns, do not always follow from the first two, but without all four profitability is likely to remain elusive. Clearly, not all books and authors will be able to meet such demanding publishing criteria.

Neither will all publishers. Some prefer not to engage in mass-market publishing, though the attraction of being able to offer a full range of publishing options to an author is powerful. But, some think it is better not to do what cannot be done well.

With the arrival and increasing influence of agents, mass-market rights, like all rights, tend to be negotiated separately and not simply thrown into the pot. For their authors, paperback publication is often where the real money is, a much desired but elusive source of potential income.

f) Foreign rights

Some publishers like to acquire foreign rights and to negotiate foreign editions or the sale of copies themselves, often with established connections in the international publishing world. But for most books, the potential reward is not great enough to warrant the expenditure of much effort.

Frequently, agents wish to retain foreign rights and negotiate foreign editions for their authors directly. Agents agree that arranging foreign editions is time consuming, laborious, frequently expensive, and often unsatisfactory in detail, yet most seem to enjoy their successes enough to persevere. Since much foreign publication is not of great financial consequence to either Canadian authors or their agents, opportunities are pursued on a highly selective basis.

g) Financial dealings

Financial dealing between publishers and authors has always been a rather tender subject. In Canada, the record has been no better than elsewhere. The

Writers Union of Canada is currently considering a proposal to undertake random audits of publisher royalty statements in the manner practised by the Society of Authors in Britain. This seems to indicate a certain dissatisfaction exists, even though literary agents are reported to bear down very hard on publishers, demanding up-to-date regular royalty statements as a matter of course.

In the matter of advances to authors, there is great variety of approach and commitment on the part of publishers. In general, it seems that advances of \$5,000 to \$30,000 with print runs of 15,000 to 20,000 copies pay out, or at least break even assuming the book sells. But here as elsewhere in publishing in Canada, there is so much variation that generalizations are difficult. Authors with agents are certainly in a stronger position in obtaining adequate advances, or money to pursue a book project, than in the past. Agents can make a strong case for financing an author in the production of a book and will often base their advance figure upon the amount needed.

h) Distribution

In matters of distribution, larger publishers, one might suppose, should have an advantage most of the time. Better systems, more staff, faster turnaround times, all it seems might benefit from having more product flow to deal with. Instead, customer dissatisfaction, as expressed by retailers and librarians, seems to circulate pretty evenly, over any lengthy period, among publishers of all stripes, small or large, Canadian-owned or foreign-owned. Some smaller publishers excel in prompt delivery of books, other do not appear to have mastered the art, even, of packing books for travel.

Some large publishers perform consistently and well in areas related say to shipping, yet appear indifferent to their customers appeals for better information regarding reprinting information and missing books.

Authors particularly complain of the lack of coordination between advertising, or their presence on tour, and the distribution of their books.

F. Role of agents

Into this relatively small, but complex, world of publishing come authors and their agents, bearing manuscripts and expectations. The activity of publishing has always baffled the vast majority of authors. Some who have claimed to understand it have taken a very dark view of it.

Literature is unfortunately a sweated trade. When we (authors) begin working we are too poor and too busy to have either the time or the means to defend ourselves against the commercial organizations which exploit us. When we become famous, we become famous suddenly,

passing at one bound from the state in which we are... too poor to fight our own battles... to a state in which our time is so valuable that it is not worth our while wasting it on lawsuits and bad debts.¹

1. Agents as Intermediaries

Notwithstanding the excellent relations of many publishers with their authors, there has always been a persistent strain of dissatisfaction with publishers and their ways which can still be heard today in the gatherings and associations of authors.

This situation has an inevitability about it. Nor is it unique, as similar elements are found in relations between musicians in orchestras and their boards, and between painters and their dealers. It is an aspect of the well recognized and difficult relationship between the Creative Artist and Commerce, between Art and Mammon.

Literary-agents who represent authors have eased this traditional situation. Coming, as many of them do, from publishing backgrounds, they are at ease with the commercial concepts of publishing. The successful among them are no less able to respond to the creative concerns of their clients.

Theirs is essentially an intermediary role and has its own strains. Writing in 1982 Coser, Radushin and Powell, discussing agentship said:

Modern literary agents are typical middlemen. Like middlemen from time immemorial, they build bridges between buyers and sellers and serve as buffers between otherwise antagonistic groups. Middlemen can absorb strains that would make it difficult for members of such groups to deal directly with the other side. The fact that middlemen belong to neither of the groups between which they mediate allows them objectivity and distance that makes them particularly useful for people who need to deal with functionally necessary partners whom they may not like.²

They go on to point out that agents are bound to evoke mixed feelings in those with whom they deal. So it seems that precisely the more indispensable literary-agents become, the more they are viewed with ambivalence.

These observations are exactly confirmed by our interviews. Publishers and editors typically categorized agents as working for authors, and largely to the publishers detriment, by pushing for more money and better terms.

¹Bernard Shaw, speech in 1906, quoted in *Authors by Profession*, London 1978.

²Coser, Kadushin, Powell, *Books, Culture and Commerce of Publishing*, N.Y., 1982.

Authors on the other hand sometimes see matters differently. One author remarked to us that the most significant thing about an agent was that he or she was the only person an author could fire.

It was also pointed out to us that agents represent more than one author and some authors are more important in terms of income to their agents than are others, thus all cannot expect the same level of commitment on the part of an agent. As well, an agent's long term relationship with a particular publisher on behalf of authors represented, may be more financially important to an agent than a particular deal on behalf of particular author.

These and similar observations seem to confirm that agents in Canada although established as part of the process, and no longer subject to active publisher hostility as was the case in the past, occupy a delicate position. This may in fact be a plus for the operation of agenting in the marketplace, keeping the timid and uncommitted at bay from a profession requiring toughness, intelligence, and commitment.

2. Agent income

Typically an agent will not accept a first book of fiction or poetry or any highly literary or exotic production. Such books are time consuming, too hard to place, and unrewarding generally. Aspirants to authorship possessing such manuscripts will be referred to the extensive subsidized small publishing community as their best chance of publication. Every agent has an example of a first work of fiction refused by 5 or 10 or 20 publishers before achieving publication and critical success in either Canada or the U.S. or U.K. The point is that even when, after much labour, publication is achieved, a book may not be profitable in terms of sales and will yield its author a maximum \$2,000, on advance. Not an attractive proposition for an agent at 10% of earnings.

Most of the income of most agents is derived from book earnings. Despite the glamour and sporadic press coverage of movie deals and options in the field of Canadian writing, agents tell us that option money is not in itself a major factor in financing agents and authors. Not plentiful in themselves, options only very rarely develop into productions, and the money involved is usually small.

A major Canadian literary agency will probably earn its income first, from Canadian editions of its authors, next from foreign editions, U.S. and U.K. mainly, and lastly from movie options and anything else it has managed to sell.

Given the importance of income from publication revenues to agents, they not unnaturally seek authors exhibiting longer term book potential. Manuscripts of "one-off" books by a writer unlikely to produce a second or third effort, must strongly and immediately transmit signals guaranteeing success in order to be interesting to an agent. If not, the labour and expense of persuading the editors of numerous publishers to read it before one finally accepts it—should that ever occur—will be left to the author.

3. "Nurturing" authors

Agents no longer have the means to persuade publishers to accept authors for publication who require some "nurture" to bring out their full sales potential. Publishers, agents claim, can no longer engage in this kind of author development, investing in an author, and deferring reward until an author has achieved an audience by means of a combination of books, interviews, reviews, and maybe a prize or award or two. Books must now look like producing a profit, whether a first book, second or third. Thus even established authors may have trouble placing a manuscript with a major publisher if sales of previous books have been disappointing. As agents point out, critical success which can be achieved by a writer on sales of as few as 800-1,200 copies frequently has little to do with popular success. Income is based on popular success and significant sales.

4. Agents and small publishers

Although smaller publishers are more willing to receive authors of first books, agents dislike dealing with small presses. Quite apart from the miniscule financial rewards, agents claim that small publishers are harder to deal with, more suspicious of agents and the deals they want to make—their desire to retain all other rights than book publication for example.

This basic attitude is confirmed by our publisher interviews. The view was expressed to us by a small publisher that authors do not need agents, an essentially parasitic activity, since standard contracts are available from the Writers Union of Canada and small publishers are very willing to deal with authors on that basis.

In retaliation, some agents point out that major publishers when publishing fiction, or other difficult books, risk their own money (which is why in these difficult times they are drawing back) whereas small Canadian publishers risk nothing, due to the subsidy system within which they work (to be consistent the same would have to be said of larger Canadian-controlled publishers, some of whom receive substantial subsidies).

Given such antipathetic attitudes, it seems that however difficult things may become for authors, agents will not spend much time attempting to place books with small publishers.

On the other hand, agents generally acknowledge that smaller publishers can frequently promote an author and arrange as many reviews, interviews, autographings, appearances, etc., as a larger publisher could. This activity will not necessarily take place nationally, as it might have done with a larger publisher, but may be concentrated in a region or province. This may be particularly the case if the book has a regional subject.

Despite this narrower focus—or because of it—a small publisher will frequently sell as many copies of a title regionally, as a larger publisher may have been able to realize nationally.

Agents, and the more alert publishers, recognize this phenomenon which works to the advantage of any book with regional connections, and use it when promoting an author and his book. Promotion for an author from Winnipeg may take the form of "local boy" in Winnipeg and Manitoba, prairie writer in the region, and concentrate solely on the quality of the book in other parts of Canada.

5. Views on publisher promotion

Many agents like to be active in author promotion. Such agents have some very negative opinions about the value of much, so called, promotional activity on the part of publishers and retailers.

The most extreme case would hold that most print advertising is money wasted, due to being in either the wrong place, i.e., trade magazines, book pages, or being badly related to distribution. Author tours are viewed with mixed feelings, and agents had much to say about the necessity of preparing authors properly for what can be arduous and demanding tours.

In the view of some, this kind of promotional activity is more related to "stroking authors" as one agent put it, and to keeping open lines of communication with media personnel around the country, including book page editors, than to promoting the actual book or author under consideration. Some agents echoed authors in categorically stating that in their experience, touring by an author does not necessarily increase significantly the sales of a particular book. Most agree however, to a longer-term beneficial effect on an author's sales produced by touring.

Such critics among agents claim that publishers persist in touring authors largely because the federal assistance is there to do so, in the form of Canada Council grants and assistance, and because they feel they ought to be doing something but can think of no good alternative which they can afford.

Affording promotion is certainly a problem as agents acknowledge. In most publishing houses the amount spent on a book is determined by the number of copies to be sold. The equation is not always a direct one of so much per unit, but the size of the edition will determine amounts spent on promotion. These amounts are often very small, beginning with, for small editions, as little as two or three hundred dollars.

Partly because of skepticism about publisher promotion abilities, agents frequently submit a marketing plan with a manuscript, detailing promotional ideas and suggestion as to markets in which the book might have particular appeal. Sometimes agents seek to ensure their author the services of an independent publicist with responsibility for handling author and book promotion on a dedicated basis.

Those authors, agents, and publishers, who bemoaned the absence of fresh ideas in book promotion, stressed that an increasingly competitive environment will make it

essential to fight for the place of books and reading in effective and imaginative ways.

Even those who accepted the promotion of books to bookstores as adequate, expressed intense dissatisfaction with the absence of promotion to the public, and with the lack of second wave promotion for books which have begun to sell.

6. Agent income

Agents develop authors in accordance with agents interests. Earning authors are what is required, non-earning authors must be either deflected into career paths which are more productive of earning for the author and agent, or cast adrift to represent themselves.

It is however, important to note that agents have authors who earn due to past publication. An agent continues to earn from author income, for as long as any book of an authors which they have placed with a publisher, yields the author an income in the form of royalties.

In a tough market, the agents' view of author potential is not different in essentials from that of the publishers with whom they deal, nor can it be. A stable of authors in whom no publisher is interested is clearly not desirable. Assuming writers have potential, in an agent's view, to become productive authors, they will be afforded the (very valuable) services of the agent in achieving the highest yield from their work.

Agents are active in all fields of trade publishing where an income can be derived from an author who is sufficiently substantial to afford an agent's fees. Though some agents prefer to handle certain kinds of authors or work, or have special expertise in certain areas, agents are active across a very wide spectrum of trade publishing activity. Saleability, not subject, is the key to agent activity. The exception is of course within the small publisher environment, where the rewards are too small. Here authors tend to act for themselves. The books produced may be of many kinds, the common denominator is the typically small scale of the activity.

The movement of authors among publishers may be determined often by money or artistic opportunity. As we have seen, an author may be lured away from an existing arrangement by a better financial deal. The financial inducement may take the form of better advances, higher royalties or some other cash consideration, or it may be related to greater levels of advertising and promotion, more exposure for the author, even physically more attractive books. The fact is though, that ultimately any of these considerations is intended to translate into higher income.

It is also true that a writer may reach a point-in his/her career when he/she is clearly established as a popular author. At this point some authors may feel free to indulge in a review of their priorities as a creative artist. If in order to realize some fondly held artistic desire, they need a new publisher who will indulge them, a change will

be contemplated. But it must be said that there seem to be as many reasons for changes in agent, author, publisher relations as there are authors.

A well known British publisher once remarked that an author (or agent) may select a publisher on the basis of money, skill, or a recent enjoyable lunch.¹

G. Effects of market size

The differences in publishing efficiencies, profitability, etc., between Canada and other English-language markets invariably resolve themselves into questions of market size.

1. Ireland

In Ireland for example, where virtually all publishers are small publishers and with a much smaller population of 5 million people, the market is even more severely limited than in Canada. Ireland, like Canada, is flooded with the books of another country which shares a common language, England. There are prestigious Irish-language publishers in Ireland and these are funded at a high level by the Irish government, which itself publishes many Irish language titles, but they require no discussion here.

Established Irish authors tend to place their books with London publishers for international distribution. Small presses are left with untried, less popular, more specialized authors. Many of these, in any publishing season, will be published for the first time.

Cost of printing in Ireland is high by international standards, as in Canada, and there are few small-run printing facilities. Although the standard of book production is high (quality paperbacks predominate) and their books have visual appeal, Irish small publishers face similar difficulties to their Canadian colleagues in finding a large enough market for their products.

A 1984 Irish Arts Council study of the "Distribution Difficulties of Small Presses in Ireland" made it clear that such problems as getting books into stores for the public to see, collecting accounts from retailers, and an inability to afford adequate sales force representations (all subjects familiar to Canadian small publishers) are central to the difficulties of Irish publishers.²

In addition, production costs on small runs are hard to keep under control, and the pressure between high costs and acceptable retail prices is acute.

¹Anthony Blond, anecdote.

²Sources: Irish Arts Council, *Distribution Difficulties of Small Presses in Ireland*, 1984; *Land of Small Presses*, Shane Cleary Press, 1985.

Caught in this pressure are Irish authors who earn very little from the publications of their works with Irish presses; consequently, agents are not much in evidence on the Irish book scene.

Faced with these problems in a small market, Irish publishers have been under the greatest pressure to explore cooperative solutions to their problems. These include a common representative service and an accounts clearing house. Efforts have also been made to develop a joint marketing strategy.

Most importantly, Irish publishers have attempted to solve the critical difficulty of such a small home market by looking to exports to afford them the increases in edition size and sales they need.

The U.S., with its population of 240 million (of whom 44 million claim Irish extraction) has been the main focus of their attention. Using U.S. wholesalers who handle warehousing, distribution, invoicing, representation and the distribution of review copies, they have attempted to achieve a situation in which their books are available on the ground, and are invoiced at U.S. prices.

Even so, the existence of many, if not most, of these publishers would be impossible without grants from the Irish Arts Council in the form of guarantees against loss, advance royalties, and interest free loans.

The Irish Arts Council study of the "Distribution Difficulties of Small Presses in Ireland" makes it clear that solutions for small publishers in Ireland hinge upon enlarging their market by improved representation and promotion at home, and developing their export capability.

2. The United States

At the other extreme, the giant U.S. market also shares many features with Canada. It has a varied mix of publishers large and small, and an active agent network. Most major authors are represented by agents, but many of the authors publishing with small presses deal directly with their publishers for each book.

Large trade publishers in the U.S. are also increasingly oriented toward celebrity books and books of popular appeal. Yet as in Canada, fine literary works and serious fiction and non-fiction still appear on the lists of some of the larger houses.

Also as in Canada, smaller presses are widely distributed throughout the country geographically. The difference is size. In the U.S., a small regionally located or specialist press can anticipate the exposure of its titles to an audience vastly larger than any available to a Canadian publisher. This, of course, transforms the economics of publishing at the small press level, as economies of scale begin to operate. The evidence for this, if any were needed, is the thriving U.S. small publishing scene and the total absence of government intervention subsidy of the kind so essential to Canada.

Because of larger editions (5,000 is common) and lower production costs more money is available to U.S. small presses than to Canadian ones. Few, however, advertise widely outside the literary and specialized journals, relying heavily on direct mail to both their bookstore customers, and to a selected public audience for their works.

Representation of their books to retailers is done mostly by regional independent representatives who often also represent larger publishers, or by individuals who specialize in small press publications.

The most significant benefit however, enjoyed by U.S. small publishers is the existence of a group of wholesalers located regionally who stock promote and supply their books to retailers. Operating on a received discount of 55%, these small press wholesalers offer retailers 40% and allow them to consolidate orders which would otherwise probably go unfilled.

As well, small press books are more fully and widely reviewed in the U.S. than in Canada—especially regionally. This probably makes it easier for an author to be “spotted” by an agent or publisher.

Behind all of this, of course, is volume. Because a larger interested public seeks any particular book, a publisher can print editions of reasonable sizes. This allows him to deal with wholesalers at 55% off retail price. Because there are a large number of successful small presses and thus a steady flow of varied and interesting product, wholesalers can stock and represent the books to bookstores in the assurance that, however a particular publisher's books may fare, the volumes overall will be sufficient to sustain their operations.

From this situation flows all kinds of other benefits for the authors of books suitable for small press publication. Certainly a better return on invested time and effort. Better organized tours and appearances at venues where books can be sold, because stock is available in the wholesale network. Healthier and more varied patterns of regional activity in relation to authors and books. Events, readings, and festivals of all kinds proliferate at the regional level in the U.S., because more individuals are engaged in an activity which affords them a living. Small press activity is hard anywhere, and there are undoubtedly many presses in the U.S. doing no better than their Canadian counterparts in these difficult economic times. Nevertheless even a relatively modest degree of success releases energies for the kinds of promotional activity so vital to fuel further success.

For larger publishers too, all the essential differences between Canadian operations and U.S. ones relate to scale. Despite the incursions of foreign conglomerates anxious to establish themselves in the U.S. by buying publishing companies, U.S. readers interests are still overwhelmingly served by a multiplicity of U.S. publishers. Because the U.S. publishing scene is so varied and competitive, agents and agencies are very much a feature of U.S. publishing.

Agents in the U.S. operate in no essential way differently from their counterparts in Canada. The agents main interest is still to acquire and retain an author who is, or can be, productive. A U.S. agent is more at risk in regard to his/her authors, since such a competitive environment encourages authors to shop around agents, as agents do publishers.

But the similarities outweigh the differences. Agents look for books which will translate into income and subsidiary rights. Promotable authors are pursued. Because of the huge appetite of television and radio interview and celebrity shows in the U.S. for subjects to interview, much book promotion is centered around the author. Although on a much larger scale and much more expensive than in Canada, television advertising in the U.S. is criticized harshly by some who feel that it is not a really effective way to promote books. Many feel that superficial books and authors are most attractive to this medium, and that more serious books are treated in superficial ways. This in the judgement of the critics trivializes the whole business of books and reading.

Agents in the U.S. are often much more deeply involved in their authors' publicity and promotion (as they are in their editing) than are Canadian agents, acting sometimes as publicists.

The main difference, though, between the two marketplaces, Canada and the U.S., is that in the U.S. there is simply more of everything. There are more potential readers, more book retailers of every kind, more publishers, more authors, more agents, more money and more choice.

In terms of author development, the consequence is that is easier for a writer to earn a living of some kind without ever being published by a major publisher. One would not wish to overstate this, as many successful small press authors have careers outside of authorship, so do the authors of many large publishers, but it is possible and does happen frequently.

VII

Conclusions

It is clear that there are two main types of activity associated with the publication and development of Canadian authors:

- ▶ The activity of the larger commercial publishers, both Canadian- and foreign-owned, who, acting with literary agents, seek out those authors whose work is suitable for the larger, more general markets to which they have access.
- ▶ The activity of smaller Canadian-owned publishers who provide a publishing venue in which the likelihood of "commercial" success has less relevance to what is published than do considerations of cultural significance and literary quality.

Our conclusions, therefore, are organized according to these two categories of publishers.

A. Larger trade publishers

- ▶ **There are, in general, no major differences in the business practices between Canadian-controlled versus foreign-controlled larger trade publishers.**

All large trade publishers have both imports and Canadian books to sell, and all seek to achieve the ratio between these two activities that will yield the best return.

It is probably true that foreign-owned agency publishers are different in that they are in a stronger position in negotiating with their principal publishers regarding which books will be taken for distribution, and in what quantities, at what price, than a Canadian-owned, more arms-length, agent.

Another difference is that an agent owned or partly-owned by a foreign principal may be in a more privileged position regarding acquiring rights to publish a Canadian edition of his principal's books. This enables the construction of a balanced list made up of agency imports; books to which Canadian publication rights have been acquired from a principal; Canadian-authored books of a similar character; and, more literary titles which yield lower financial returns, even though they are prestigious. Still it is likely that all books, Canadian editions of foreign titles or Canadian authored books, will

increasingly have to justify themselves financially as publishers seek to publish books with strong potential, which can be promoted effectively.

► **It is among larger trade publishers that literary agent activity takes place.**

Literary agents seek distribution and promotion "muscle" in a publisher, along with the willingness and capacity to pay decent advances and royalties. A publisher's ability to produce an author's work throughout the three publishing tiers, hardcover, quality paperback, and mass-market, is a considerable plus. However, agents are quite prepared to negotiate mass-market rights elsewhere if an author is successful in hardcover publication.

While acknowledging that there may only be very small audiences for some kinds of publishing, agents question many of the assumptions of the book trade about what is achievable in terms of sales, and seek for their authors publishers who are committed to aggressive marketing and promotion.

Literary agents have to believe that the books they place with publishers are good books. If they are properly produced and effectively promoted they will sell. If they sell, the money for author and agent will take care of itself.

► **Literary-agents prefer not to deal with small publishers.**

Literary-agents are not usually interested in representing authors who publish only with small publishers. The small editions and restricted sales, with low financial yield are unattractive to them.

► **Literary-agents have difficulties placing "literary" manuscripts with commercial publishers.**

On the other hand, literary-agents are concerned about the larger publisher's increasing unwillingness to consider more literary first books, or even books by established writers which appear to have a more limited potential for sales. Such books, though frequently worthwhile in a literary sense, are increasingly difficult for a publisher to justify financially.

► **Literary-agents have assumed the role of author development.**

Though there are larger Canadian publishing houses with reputations established over many years, such as McClelland and Stewart and Macmillan of Canada, which seek out and develop Canada's culturally important writers, they can no longer fulfill this role to the extent they have in the past. Economic conditions make it difficult. In some cases, it will be the financial uncertainty of the particular company which will prohibit such low or non-profit activity. In other cases, the search for profit in a tight and competitive marketplace will shear away such publishing, as larger publishers re-align their publishing lists toward titles which yield higher unit sales or more profitable subsidiary income.

For most books, literary or otherwise, it is in this context of larger publishers that author development by agents, in the sense of improving the author's financial rewards, takes place. Agents, by their access to these larger publishers and by urging their authors to explore all the available avenues of creative effort and of income, assist their development and make it possible for them to exist and to continue as writers. A good agent acts on behalf of clients identifying and promoting opportunities perhaps not always evident or available to writers themselves. They are in a favourable position to do this owing to their multiplicity of contacts with authors, editors, the media and others in the industry.

- ▶ **Literary-agents have the main role in developing the various rights in an authors work.**

Literary agents' awareness of the potential importance of the various rights in a work (domestic, foreign, subsidiary film and media) and their ability to exploit them fully on behalf of their authors, has altered the relationship between authors and publishers fundamentally. It is now the agent, not the publisher, who will usually determine the disposition of these various rights to the authors advantage.

B. Smaller trade publishers

- ▶ **Smaller Canadian publishers play an active role in introducing Canadian authors to the marketplace but lack the means to enable them to fully exploit their market potential.**

Smaller publishers undoubtedly constitute a seed bed in which Canadian writers can make a beginning in book publication. Some small presses are almost an extension of literary periodicals in which writers may exercise a parallel publishing career and develop their skills. The more alert editors of larger houses, and some literary agents, keep an eye on this milieu with a view to early identification of promising authors.

Some authors are happiest in a small publishing environment, since their readership, though small, is assured. Frequently they regard themselves as the elite among authors, catering as they see it, to "serious" readers who are interested in quality writing, or maybe new and experimental "cutting edge" work, and will seek it out.

Other authors writing in areas not of wide general interest, Canadian social or military history perhaps, will be happiest with a small specialist publisher who understands these markets.

- ▶ **Smaller publishers typically have only a limited means of promoting their product.**

Some small press authors feel that they are capable of a larger readership and that they are held back by inadequacies in promotion and distribution.

This is the dilemma of the small press. Most lack the presence in the marketplace to fully exploit an opportunity of this kind even if they could identify it. There have been notable exceptions, cases of small presses which have been able to develop or capitalize on a publishing property, for some it has even formed the basis of a continuing prosperity, but these are exceptions. Most small publishers lack the resources, and frequently the expertise, to achieve such promotional and distribution breakthroughs.

C. Industry needs

Based on our analysis, there are a number of industry needs, which are mainly related to the promotion problems of the trade book industry.

- ▶ **Concern regarding inadequate marketing and promotion is widespread throughout the industry.**

One thing is abundantly clear from our interviews and discussions with authors, agents, publishers and booksellers, issues of marketing and promotion are on everybody's mind. The cost of publishing books will not diminish, without larger markets the prospects are bleak for much Canadian publishing.

This observation is not confined to small publishers. There are profound dissatisfactions with the marketing and promotion of publishers of all sizes. Periodically a publisher will mount a campaign for a particular book which is imaginative and effective. Such events, comparatively rare, highlight the ordinariness of much of what goes on under the name of promotion.

- ▶ **Difficulties of financing individual efforts in promotion ought to encourage the consideration of cooperative effort.**

As we have observed individual enterprise is difficult to finance on the margins available in the book industry, but truly cooperative undertakings have hardly been attempted, and it may be here that the best hope lies for better more effective promotional activity.

From the perspective of author development anyone seeking to effect beneficial change in the environment of small, already subsidized, publishers might ponder these questions.

- ▶ Can the real size of the market for small and literary presses be determined?

- ▶ Can the market for small publishers be enlarged by directing even more attention to cooperative marketing, promotion, and distribution activities?
- ▶ Are there better ways to promote and sell the authors and books of these small presses than has so far been uncovered?

For larger publishers, both foreign and Canadian-owned, who publish Canadian authors, a key question might be how to boost the number of copies that can be sold of a "literary" author's work?

If a radical departure were sought in addressing the problem of bringing first manuscripts of acknowledged merit and cultural significance to Canadian readers, consideration might be given to the total funding of a publishing program devoted to that end. Located in a major publishing house, or publishing houses, it might in the end prove to be the least costly and most effective means of achieving a wider circulation of such publications.

For such a scheme to succeed it would probably be necessary to subsidize the cost of a book at all levels, preparation, production, distribution and promotion.

Manuscripts might be juried, perhaps by small press publishers themselves, and such a program might mix titles published for the first time with reprints of previously published small press books.

- ▶ **The lack of industry activity directed at consumers is a serious deficiency in book promotion.**

Enabling Canadian publishers of all sizes to be more successful is seen by many as a question of enlarging the audience for books. Cooperative activity toward this end involving writers, publishers, retailers, librarians, is lacking at present. Such cooperative undertakings as do exist are the initiative of smaller Canadian-owned publishers and are government-funded. The Canadian Book Information Centre, the Children's Book Centre, the activities of the Literary Press Group we have described are useful in themselves, but do not directly address the consumer.

Much more industry attention to marketing and promotion is warranted. It is well understood that many of the difficulties encountered by those attempting to introduce innovation into the book industry approach to promotion and advertising relate more to cost than to any lack of ingenuity. The very nature of book product, a multiplicity of individual titles, each unique and available from a sole source, and mostly selling only a few hundred copies, makes promotion difficult for individual publishers.

What cannot be attempted individually may perhaps be accomplished collectively. The industry should be encouraged to support such cooperative effort.

Appendix A

Interview List

John Pearce, Editor-in-Chief	Doubleday Canada Ltd.
Phillip A. Campsie, Editor-in-Chief	MacMillan of Canada
Ed Carson, Vice President, Publishing	Random House of Canada Ltd.
Douglas Gibson, Publisher	McClelland and Stewart Inc.
William Toye, Editorial Director	Oxford University Press Canada
Don Bastian, Managing Editor	Stoddart Publishing Co. Ltd.
Valerie Hussey, Publisher	Kids Can Press
Tanya Long, Managing Editor Trade	Prentice Hall Canada Inc.
Stanley Colbert, C.E.O.	Harper and Collins Books of Canada Ltd.
Lucinda Vardey, President	Lucinda Vardey Agency Ltd.
Larry Hoffman, Vice President	Authors Marketing Services Ltd.
Janice Whitford, Literary Agent	Lucinda Vardey Agency Ltd.
Bella Pomer, Literary Agent	Bella Pomer Agency Inc.
Joanne Kellock, Literary Agent	J. Kellock and Associates Ltd.
Linda McKnight, Partner	McKnight Associates
Denise Bukowsky, Literary Agent	Denise Bukowsky Agency
Carolyn Brunton, Literary Agent	Carolyn Brunton Agency, U.K./U.S.
Andrew Hewson, Literary Agent	Andrew Hewson Agency, U.K./U.S.

Interview List (cont'd)

Kieran Simpson, Data Manager	Canadian Books in Print
Penny Dickens, Executive Director	Writers Union of Canada
Marc Cote, Executive Director	Literary Press Group
Peter Hanson, Author	Toronto
Matt Cohen, Author	Toronto
Janette Turner Hospital, Author	Kingston
Roy McSkimming, Author	Ottawa

