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November 7, 2008

Dear Stakeholder,

We are pleased to announce the release of an important study on Ontario's book publishing industry, entitled ***A Strategic Study for the Book Publishing Industry In Ontario***. The study was authored by Castledale Inc., in association with the Nordicity Group Ltd., with funding from the Ontario Media Development Corporation (OMDC) on behalf of its Book Publishing Industry Advisory Committee. The study is available on our website at www.omdc.on.ca

OMDC was pleased to work with a dedicated group of book publishing industry stakeholders in developing this study. The purpose of this study was to identify emerging growth opportunities and strategic program initiatives for the book publishing industry in Ontario for the next five years.

The study identifies books as a "creative engine" that fuels many other forms of expression in the entertainment and media industries. Ontario's Canadian-owned book publishers have published works as diverse as the *Franklin the Turtle* series, beloved by children around the world, and Margaret Laurence's *The Stone Angel*.

Ontario children's book publishers have been particularly successful in the export arena and our children's books are respected internationally. For example, Second Story Press has sold the rights to publish *Hana's Suitcase* in over a dozen languages around the world, as well as theatrical, film and audio rights.

While the book publishing industry's business model is, so far, the creative industry least disrupted by digital technologies on the consumer side, the study demonstrates that the industry has embraced digital technology for internal workflow processes, for supply chain systems and process, and for marketing and sales. The study's authors feel that this demonstrates that the Ontario book publishing industry may succeed at moving smoothly through the digital maturity curve.

The goal of the study's recommendations is to help the Ontario book publishing industry reach a level:

- where Ontario book publishers have increased access to domestic and foreign markets;
- where the Ontario-based industry has the resources, knowledge, and skill sets to master the online and digital environments and to use the technology to generate more revenues and/or to decrease costs;
- where Ontario publishers have access to private financing and investment; and
- where the book publishing industry in Ontario reinforces creative expression and development as well as business success.

While the study's recommendations require more detailed examination, they provide a good starting point from which government and the industry can continue to work together towards advancing Ontario's book publishing industry as a vital component in the future social and economic development of Ontario's promising Entertainment and Creative Cluster.

Sincerely,

A handwritten signature in black ink, appearing to read 'Karen Thorne-Stone', written in a cursive style.

Karen Thorne-Stone
President & Chief Executive Officer, OMDC

on behalf of the Book Publishing Study Steering Committee:

Michael O'Connor, Publisher, Insomniac Press, Industry Co-Chair, OMDC Book Publishing
Industry Advisory Committee

Karen Boersma, Vice-President & Associate Publisher, KidsCan Press

Jack David, President/Publisher, ECW Press

Susan Renouf, Vice-President, Associate Publisher & C.O.O., McClelland & Stewart Ltd.

Carolyn Wood, Executive Director, ACP