



A RE-IMAGINED BOOK FAIR

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EXECUTIVE SUMMARY

The publishing and book industry is undergoing a period of massive transition. Old business models are under threat and new models are in constant transformation in response to an accelerated pace of change and an unpredictable future.

As distribution networks and bricks and mortar bookstores have shrunk or disappeared, publishers in English Canada have identified that they are seeking opportunities to engage directly with their readers, similar to opportunities enjoyed in Québec for French language publishers at the Salon du livre de Montréal.

However, it has been five years since there has been a similar opportunity for the English-language book industry and the last such fair, BookExpo Canada, did not have the public face that our research has indicated publishers today see as vital to the success of the book sector.

A series of interviews and consultations with approximately 40 industry stakeholders and an online survey of 130 publishing firms in Canada established that there is strong support for a re-imagined international book fair that would reinforce the industry's ability to market and sell books. Forty-eight percent of survey respondents said they would attend a book fair in Toronto and a further 44.4% said they would come depending on such things as cost, timing, features and resources.

Additional research was conducted through interviews with other experts, locally, nationally and internationally, to test potential models. These discussions resulted in several suggestions, such as a program for Able Readers; potential partnerships with entities like IFOA, Luminato, Frankfurt Academy Program, and Humber School of Writing, as well as advice on timing, potential for inclusion of rights and other trade programs.

In order to further explore the best model for such a re-imagined international book fair, seven national and international fairs were examined. These fairs range from industry only events (London), to industry events with a small public program (BookExpo), to those with a major public focus (Paris, Montréal, Frankfurt, Turin and Guadalajara).

The model that has emerged for a re-imagined fair that best responds to the needs of the book industry here is based on the success of those fairs that include the following factors: they include all genres, cater to all age ranges, offer popular as well as professional programs, and provide opportunities for the public to interact with favourite authors. A common best practice that emerged from our research and which we recommend adopting is that the Fair should not offer any discounting of books.

In addition, our research has culminated in the recommendation of several unique features of a re-imagined book fair that would leverage Toronto's strength as a production and distribution centre for film, television and the gaming industry; its diverse cultural community and the potential for cultural programming. These components and other exciting programming features aim to make this Fair a galvanizing event for the industry, build an international profile and be a magnet for readers and book buyers.

Using estimates, attendance in the Fair's first year is projected at between 75,000 and 125,000, economic impact modelling suggests the Fair could contribute up to \$39 million in economic impacts, add 600 jobs to the local economy and attract approximately 20,000 tourists.

As the book sector navigates an uncertain future, the industry has identified a critical need to foster collaboration with readers. The Book Fair will be a catalytic, imaginative and profitable forum that brings readers, publishers and authors together to connect and rediscover their passion for books.

Key Research Findings

Throughout the research and interviews a number of key themes emerged:

- A need exists in the English-language publishing industry for a convening event where the industry can meet with each other, with related businesses and connect directly with the public.
- Publishers want the opportunity to connect with and sell either directly or through bookstores to the public at an event that allows for the discoverability of books.
- There must not be any discounting of books.
- International rights must be approached slowly, if at all, in order not to overextend in the first few years.
- Entry fees must be kept low and exhibit fees must be affordable.
- A Toronto Fair must reflect and serve its diverse cultural community.
- A Toronto Fair should include a strong educational component.



RECOMMENDATIONS

It is recommended that:

1. Urgent attention be given to the Canadian book industry as it undergoes a tumultuous transition phase similar to what the music industry experienced in the past decade.
2. Support be given to launching a re-imagined English-language book fair in Toronto with a significant public component, and affordable entry and exhibit fees, that allows publishers to interact directly with and sell books to the public.
3. The re-imagined Book Fair provide Canadian-owned, independent publishers with a strong forum and the opportunity to showcase their titles.
4. The re-imagined Book Fair, while allowing for marketing incentives and vouchers, not allow for books to be sold at discounted prices.
5. The re-imagined Book Fair feature all genres of books, fan literature and writing, and promote reading in all forms.
6. Exciting programming catering to different genres and readers be created as part of the re-imagined Book Fair and that a cultural Fringe Festival component be developed.
7. Multi-platform opportunities be strongly featured as a component of the re-imagined Book Fair, capitalizing on Toronto's strength as a centre of film, television and gaming industries.
8. Partnerships be developed with existing local, national and international literary entities.
9. A prospectus/business plan and marketing strategy be developed as soon as possible in order to attract investors from the private and public sectors.
10. An entity be created to develop, manage, produce and promote the re-imagined Toronto Book Fair.

INTRODUCTION

It has been five years since English Canada has had a book fair to serve as the market and meeting place for its publishing industry.

The last BookExpo Canada, the forum at which Canadian publishers and booksellers did business, took place in June 2008. Its cancellation, announced by Reed Exhibitions in early 2009, was followed by another announcement that Reed's plans to launch a new consumer-oriented book fair that fall were also being cancelled.

Publishers in Canada met news of the cancellation with mixed feelings. Many commented that the old model had run its course and was not providing a useful service to the publishing industry. Others regretted that there was no longer an opportunity for a large-scale event where the industry could meet and members could network with each other. A number of publishers identified the persistent and growing need to engage more directly and vibrantly with readers—a need which BookExpo Canada had never met.

What most publishers agreed on was that the old trade-show format where they displayed their books to booksellers wasn't working in the new environment of increasing consolidation of booksellers and book distribution.

In the years since then, that consolidation has intensified and, with the acceleration of the e-book revolution, the book sector's business model has been irrevocably transformed.

Hindsight shows us that the death and stillbirth of BookExpo Canada and its planned consumer-oriented event were harbingers of a massive transition period for the book sector, a transition that is still in play and for which the ultimate outcome is unclear.

Paradoxically, those industry changes and challenges are among the factors that have emerged through our research to suggest that, not only is the time right, but there is some urgency in launching a re-imagined book fair that brings the industry a new profile and expanded opportunities.

The report that follows describes the factors that could lead to the success of a re-imagined book fair that includes both public and industry elements and is a magnet for attracting and expanding the book-buying public; that brings the industry together in its shared goal of serving readers and is structured to meet the needs of small and large publishers; that shines an international spotlight on Canadian books and authors and ignites the imagination of the public.



THE VISION

“A book is as individual as a fingerprint.”

— Sylvia Fraser, novelist

The written word has been a part of civilization from its earliest beginnings. Books, whether engraved in stone, or in parchment, illuminated manuscript, paperback or e-reader form, are at the heart of information, knowledge and storytelling. And information, knowledge dissemination and storytelling are at the heart of civilization.

Book publishing is the creative act of bringing the written word to an audience; of editing, packaging, typesetting, designing, illustrating, marketing and yes, selling an author’s words to as many people as can be reached. This inter-dependent world of writers, publishers and readers has, in recent years, seen seismic shifts that have left many wondering what the future holds for the book industry.

A re-imagined book fair does not hold an answer to that question. But it can be a place where readers are re-enchanted by the magic of books; a place where books of all formats and genres entertain, inform, inspire, incite and soothe; where we can tell our own stories to ourselves and to the world and where we can share in the stories of the world.

The re-imagined Toronto Book Fair will make the book the star attraction and remind us that books are fundamental to our culture. It will be a place for readers to connect in the most immediate ways with those who write and those who produce the books they love, and a place where they can re-connect with the passion and enchantment of the world of reading.



PROJECT BACKGROUND

In the report that follows we discuss what we heard from members of the book sector and other stakeholders, and their views on how a re-imagined fair could benefit the industry.

We review models of international book fairs; look at the landscape of book fairs and festivals in Canada; address opportunities and challenges; and describe the components of a successful model for a broad-spectrum book fair that positions, promotes and strengthens the publishing industry in Canada—locally, provincially and nationally.

Purpose and Objectives

This study comprises the first phase of research to examine the feasibility of establishing a book fair in Toronto that will serve and enhance the publishing and book industry in Canada as well as attract international attendance and attention. The purpose and objectives of this study were:

- To canvas the book industry in order to gauge its stakeholders' appetite for a Toronto Book Fair.
- To find the appropriate model for a Toronto Book Fair by visiting and analyzing established national and international book fairs.
- To survey the Canadian literary landscape and to enumerate the potential benefits and challenges facing a Toronto Book Fair.
- To determine whether there was enough evidence to warrant moving to the next step in the creation of a Toronto Book Fair.

Research Team

This study was commissioned by The Association for Art and Social Change, a not-for-profit corporation whose mandate is the establishment and operation of an arts organization for the purpose of promoting the creation of literary, visual, musical, and performance art.

John Calabro is a literary consultant, an educator, a publisher, a writer, and the president of Quattro Books Inc., an independent Toronto press dedicated to publishing works of literary merit regardless of cultural, national, or linguistic background. John has also taught Entrepreneurship and Marketing and is a published author.

Rita Davies is a cultural consultant, planner and strategist. During more than a dozen years as head of Culture for the City of Toronto, Rita Davies showed leadership and vision in putting culture at the heart of the city's economic and social agenda. Her dynamic work as a passionate cultural leader and advocate was recognized in 2011 with a Canadian Urban Institute City Soul Award.

Sarah Beaudin and Maddy Curry acted as Research Assistants for this project.

Methodology

The researchers conducted primary and secondary research, including soliciting the advice, input and expertise of an Advisory Committee of industry experts, in-depth interviews with 30 book sector experts and a further eight interviews with the sector by phone or email, and comprehensive interviews with 23 individuals from government or other related sectors.

Other research was conducted through a literature review of over 60 reports and articles and an online survey that was sent to 130 publishing firms in Canada. (Please see Appendix 4 on p. 45 for background on the survey and key findings.)

Seven international book fairs were examined and four of these (Salon du livre de Montréal, London Book Fair, Salon du livre de Paris, and Guadalajara Book Fair) were visited. (Please see International Models on p. 14 and Appendix 2, p. 41 for a discussion on the findings from this research.)

Advisory Committee

An Advisory Committee was established to oversee the work and provide industry advice, expertise and experience. The Committee comprised:

- Patsy Aldana (Aldanalibros)
- Cory Beatty (Director of Marketing, HarperCollins)
- Chris Bucci (Agent, Anne McDermid & Associates Ltd.)
- Patrick Crean (Patrick Crean Editions)
- Leith Hayman (Sales Director and Field Sales Manager, Penguin Canada)
- Jack Illingworth (Executive Director, Literary Press Group of Canada)
- Eric Jensen (VP of Marketing, House of Anansi Press)
- Ben McNally (Ben McNally Books)
- Shelagh Paterson (Executive Director, Ontario Library Association)
- Scott Sellers (VP & Director of Marketing Strategy, Random House Canada)
- Margie Wolfe (Publisher, Second Story Press)

The Advisory Committee met for one-and-a-half hours on three occasions during the course of this work: February 6, March 13, and May 6, 2013. In addition, Committee members provided advice and feedback to the research team as the work proceeded.

See Appendix 3: Synopsis of Advisory Committee Meetings on p.44 for a synopsis of key issues and direction discussed at these meetings.

Literature Review

Between February and March 2013 we have collected data from over 60 reports and articles, including BookNet Canada's 2012 edition of The Canadian Book Market, in an effort to identify the current reading and book-buying trends, as well as the literary needs that are not currently being met.

A complete list of the reference materials can be found in Appendix 7: Reference Materials, p. 62.

Book Publishers' Survey

Data was collected via an online survey that was distributed to 130 publishing firms in Canada. The publishers included in the survey were the publicly listed members of the Association of Canadian Publishers (ACP). Additional companies (non-ACP members) were added after receiving feedback from industry professionals. In total, 60 of these firms are based in Ontario.

Please refer to Appendix 4: Publishers' Survey, p. 45 for sample responses, key findings, a copy of the questionnaire, and the complete survey results.

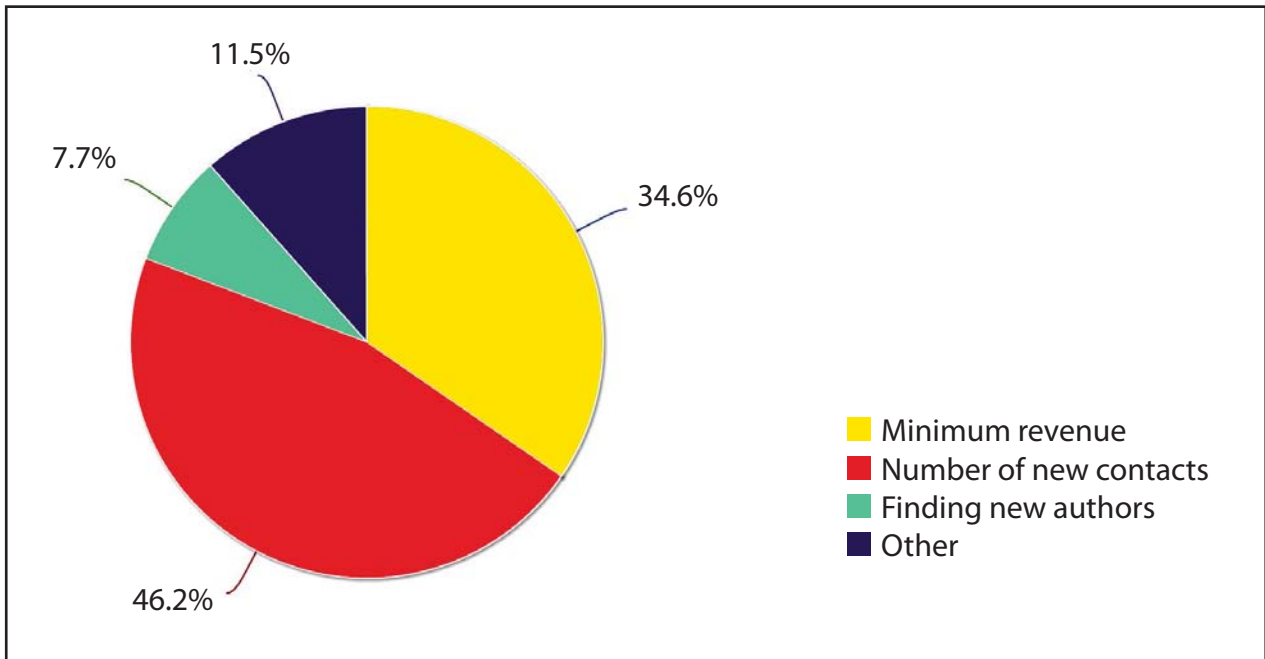


Fig. 1: Sample Question from Book Publishers' survey.

"What criteria do you use to measure the success of your participation in a Book Fair?"

Minimum revenue (34.6%)

Number of new contacts (46.2%)

Finding new authors (7.7%)

Other (11.5%)

Interview Responses

A series of interviews were held with over 60 stakeholders from the book and publishing, government, education, library and cultural sectors (please see Appendix 5: Consultation List, p. 57 for a complete list).



THE LANDSCAPE

Canada is a nation of readers.

Canada is a nation of readers. It's not just that Canada has a high literacy rate (approximately 97%), but that Canadians have an appetite for books. The latest National Book Count shows that in a single week Canadians buy and borrow more than 3.4 million books. (Chris Harwood, "State of Literacy and Essential Skills Field," Canadian Literacy and Learning Network, 2012.)

Toronto itself is a city of avid readers; more people visit the Toronto public libraries every year than ten of the most popular GTA attractions combined. (Govind C. Rao, "The Great Equalizer: The Case for Investing in the Toronto Public Library," Canadian Centre for Policy Alternatives, November, 2012.)

Ontario and the Toronto area are recognized as centres for the creative industries. In its most recent profile of the publishing industry, Statistics Canada (Book Publishers, 2010) identified the book publishing industry in Canada as a \$2 billion industry, with nearly two-thirds of revenues generated in Ontario. Ontario (65%) and Quebec (30%) combined make up 95% of the total book publishing industry operating profits, while Canadian sales accounted for 72.3% of total operating revenues.

While clusters of Canadian publishers exist in Vancouver, Winnipeg and in Atlantic Canada, Toronto is recognized as the centre of the industry for English-language publishing in Canada. In addition to the 50 publishers located in Toronto, Toronto also houses the head offices for Indigo and Kobo as well as a host of major literary agents.

In Ontario, publishing is an industry of primarily small and medium-sized companies, including the six who are French-language publishers. The largest companies are foreign-owned. The Book Retail Sector study by Heritage Canada (2007) showed that Canadian-based publishers accounted for 41% of domestic sales while the other 51% was accounted for by Canadian subsidiary of foreign-owned multinationals.

These companies play a vital role in ensuring that our voices and our stories are told. According to Statistics Canada, over 80 percent of Canadian-authored books are originated by Canadian-owned publishers. And all of them face challenges in sustaining and growing their capacity to fill that role.

Book publishing in Canada is a \$2 billion industry, with nearly $\frac{2}{3}$ of revenues generated in Ontario.



17.6 million people attend 10 of Toronto's main attractions annually

19.1 million people attend the Toronto Public Library annually

An Altered Universe

The small Canadian market has been an enduring challenge for publishers in Ontario. In the past decade, publishers' ability to reach their consumers has been further exacerbated by the huge consolidation of booksellers. Last fall the Canadian Booksellers Association (CBA) announced that it was merging with the Retail Council of Canada. Some 350 independent bookstores have closed across Canada in the past decade, according to the CBA.

Some 350 independent bookstores have closed across Canada in the past decade, according to the CBA.

For publishers and the public alike, this has diminished what has been referred to as the "discoverability" of books: the way in which the public used to serendipitously browse and, while browsing, come upon domestic titles, thus discovering new books by Canadian authors simply by wandering through the aisles of a bookstore.

The smaller, independent publishers face particular challenges related to their competitiveness due to their scale and other factors, evident in the recent demise of yet another crop of Canadian publishers.

The most significant change confronting the publishing world presents itself as both a challenge and an opportunity for the Canadian industry. E-books are a new way for publishers to reach their public. Virtual bookstores, while another challenge to bricks and mortar stores, offer additional opportunities for publishers to reach consumers, and for the creation of an accessible marketing reach.

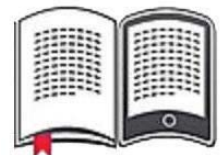
Despite the rise in potential readership and sales, for many of the smaller publishers and even for larger foreign-owned publishers, this virtual marketplace presents its own challenges.

While these new business models are still evolving, statistics show that almost thirty percent of adults in the U.S. own an e-reader and that, on their devices, they appear to read more books than the average non-e-book reader. (Kathryn Zickuhr and Lee Rainie, "The Rise of e-reading," Pew Internet and American Life Project. October, 2012.)

At the same time, new technology does not simply supplant proven technologies. There is still a large market for physical books. It is a trend that is likely to last, as it is largely perpetrated by the younger generations. The same Zickuhr and Rainie study shows that 58% of youths who have read an e-book claim they still prefer to read physical books. These studies show that most young Americans appreciate the convenience and accessibility of digital books, but they prefer the experience of reading from paper. Chris Hughes, the 27 year-old Facebook co-founder, when asked why he saved *The New Republic*, replied "I love print...it's sharable, it's an object." (*New York Times Style Magazine*, June 3, 2013.)

"I love print... it's sharable, it's an object."

Recent U.S. studies show that 58% of youths who have read an e-book claim they still prefer to read physical books.



International Models

There are hundreds of book fairs varying in size and scope around the world. There are the large international fairs, such as the Guadalajara Book Fair in Mexico with a yearly attendance of 700,000, and the smaller national ones, like Canada's own Ottawa Small Press Book Fair. In addition to international fairs, there are those with a national or regional focus, such as the Salon du livre de Montréal in Québec. Of the major international fairs, there are those that are industry-only, like the London International Book Fair, those that are primarily consumer-oriented, such as the Salon du livre de Paris, and those which are both, like the Frankfurt Book Fair in Germany. Étonnants-Voyageurs in Saint-Malo exemplifies a fair that doubles as a major literary festival, offering extensive literary programming, while BookExpo in New York has a narrower focus and, as such, limits literary programming. There are one-day festivals, such as Canada's Word On The Street, and those which stretch much longer, like the Buenos Aires International Book Fair, which lasts several weeks. Some fairs offer free or low admission, while others require a nominal fee; many fairs also seek to accommodate various types of visitors, and so offer differentiated entrance fees. Fair organizers range from the multinationals, such as Reed, to non-profits, bookseller associations, universities or cultural agencies.

The research conducted for this study analyzed seven book fairs to help determine what model would best suit a re-imagined Toronto Book Fair and appropriately serve and benefit the Canadian English book market.

All seven models offer insight into the re-imagination of a Toronto Book Fair. Each of the fairs examined has over time created a strong brand, and although there have been modifications over the years, the core branding for these, and for most fairs, runs along two spectrums: one spectrum has trade fair at one extreme and public fair at the other extreme, while the other spectrum goes from being entirely international to being mostly national or regional. All fairs start with a core focus of exhibitors—local and international publishers, booksellers, distributors, authors, speakers, local magazines and newspapers—that reflect their branding. With varying degrees of success and interest, most fairs have added components that have moved them along those spectrums toward a middle ground, where national and international exhibition occurs amidst programming that is a mix of trade and public.

Key Findings and Success Factors of International Models



Models such as Paris and Turin that **strive for innovation and offer add-on components such as dedicated culinary, travel, art, and digital spaces** are experiencing attendance of 200,000 to 300,000 people annually and bill themselves as the largest bookstore in their country for the period of the fair. While we do not project that level of attendance in Toronto, we recommend following the innovative programming of these fairs to draw attendance and add to the overall buzz of the event.



All seven fairs studied, including those that focused on the public, provided **dedicated professional days** for publishers, translators, editors, librarians, and booksellers that revolved around full days of panels, lectures, discussions and practical workshops that dealt with particular issues within the book industry. These well-attended events attracted various associations and their members to the respective fairs.

All public facing fairs were able to attract **large numbers of students**, from 18,000 in Montréal to 90,000 in Guadalajara, by fostering successful outreach programs and partnerships with their cities' educational councils and boards. These students were not only active and excited participants in programs created for them but were great purchasers of books.

A best practice, started at the Jerusalem Book Fair and now present in most fairs, is **the inclusion of Fellowships to industry professionals from other countries**. This program was universally praised as a way to foster international relationships.

A recent and exciting add-on to several fairs (Turin, Frankfurt) is the creation of **a mentoring and incubator-type program for new publishers** in order to bring in and raise the visibility of young and innovative new publishers.

All fairs feature a guest country, which attracts international attention to the host country and adds **a cultural component**; an interesting and welcomed successful addition to some fairs (Paris, Turin) is the inclusion of a guest region. This rotating regional focus was welcomed by both the industry and the public.

Every fair that we visited and studied provided space and time for **the awarding of local and national literary prizes** as well as the awarding of literary prizes created specifically by the individual fair. The prizes were a welcome addition of glitz and glamour to the fair and attracted both public and media attention.



Guadalajara International Book Fair, Guadalajara, Mexico



Salon Du Livre, Paris, France.

Author appearances, over a thousand in many cases, are central to all the fairs analyzed, including those that are only trade fairs. Ranging from marquee national and international authors to new and local authors, their appearances on stage and at dedicated signing areas were a very large public and professional draw.

All fairs, except for Montréal which is a national fair, had **a rights component**. Although some fairs like Paris and Turin had a much smaller rights section than some of the other fairs, it was an important feature of all fairs analyzed.

The Turin Book Fair is a great example of a fair that adds **many on-site and off-site cultural events around literature and the book** by creating unique partnerships and, in effect, extending the celebration of books to the whole city. This may not be something possible for an inaugural fair but it is certainly a worthwhile feature to explore.

Fair organizers, participating exhibitors, professional and public visitors were unequivocally united in their opinion that a successful fair had to have **varied, exciting, relevant and innovative programming** to make a book fair a not-to-be-missed event. As well, fair organizers (Montréal, Guadalajara, and Paris) emphasized that entrance fees must be kept low, along with promotionally discounted ticket prices, to ensure appropriate crowds.

Exhibiting publishers concurred with our Advisory Committee that a successful fair must **showcase the book in every way possible** in order to create effective opportunities for selling books; in other words, make the book the star of the fair. Turin and Guadalajara show that a successful and profitable fair **needs to generate 50-70% of their revenues from exhibitors' fees**.

Please see Appendix 2: Synopsis of Book Fairs for a short synopsis of the seven fairs.

The Canadian Book Fair and Festival Scene



71% of Canadians are interested in reading Canadian authors

Canadians are great supporters of their literary scene. A study commissioned by the Department of Canadian Heritage in 2007 on Reading and Book Buying Behaviours found that 71% of Canadians are interested in reading Canadian authors, and 72% had done so.

We are a nation of literary creators, home to over 130 independent book publishers, thousands of professional writers and over 60 literary magazine publishers. Canadian publishers produce more than 16,000 new titles per year (as shown by the above study). There are 45 medium-sized literary festivals in Canada such as BookFest Windsor, Galiano Literary Festival, The Edmonton Poetry Festival, and the Ottawa International Writers Festival among others that are funded by the Canada Council for the Arts, and a multitude of smaller, privately funded festivals.

Toronto is also home to over 30 independently run reading series, from the three-decade long Art Bar Series to the newer Toronto Poetry Slam.

Each year a variety of storytelling, spoken word and literary festivals take place, catering to Torontonians' appetite for book-related events and programs, not to mention the countless book clubs that dot Toronto and the GTA.

Small book fairs like The Old Book and Paper Show, Toronto Book Fair and Paper Show, the Toronto International Antiquarian Book Fair, The Small Press of Toronto Winter and Spring Book Fairs, the Ottawa Small Press Book Fair and many others have found a niche in Ontario—a scenario duplicated in major cities across Canada.

In addition, Toronto is home to the world-famous International Festival of Authors and to Word On The Street, an outdoor day-long literary festival that brings over 200,000 visitors and 250 exhibitors.



Word On The Street, Toronto. Image courtesy of Word On The Street.

It is worth noting that almost half of the Canada Council for the Arts funded festivals are French-language festivals, of which almost 90% take place in Québec. Québec also hosts two book fairs, the Salon du livre de Montréal, and the Salon International du livre de Québec. (Canada Council for the Arts: literary-readings-and-festivals-across-Canada.)

“the Salons are an invaluable platform for book marketing [...]”

Heritage Canada’s 2007 study on The Book Market in Québec notes that, “the Salons are an invaluable platform for book marketing and also effectively represent an additional sales channel—both for retailers and for direct-to-consumer sales by publishers [...]”

However, there are currently no similarly large-scale English-language book fairs in Canada that bring to English-language publishers these significant marketing and sales opportunities enjoyed by French-language publishers.



A RE-IMAGINED TORONTO BOOK FAIR

Recommended Model

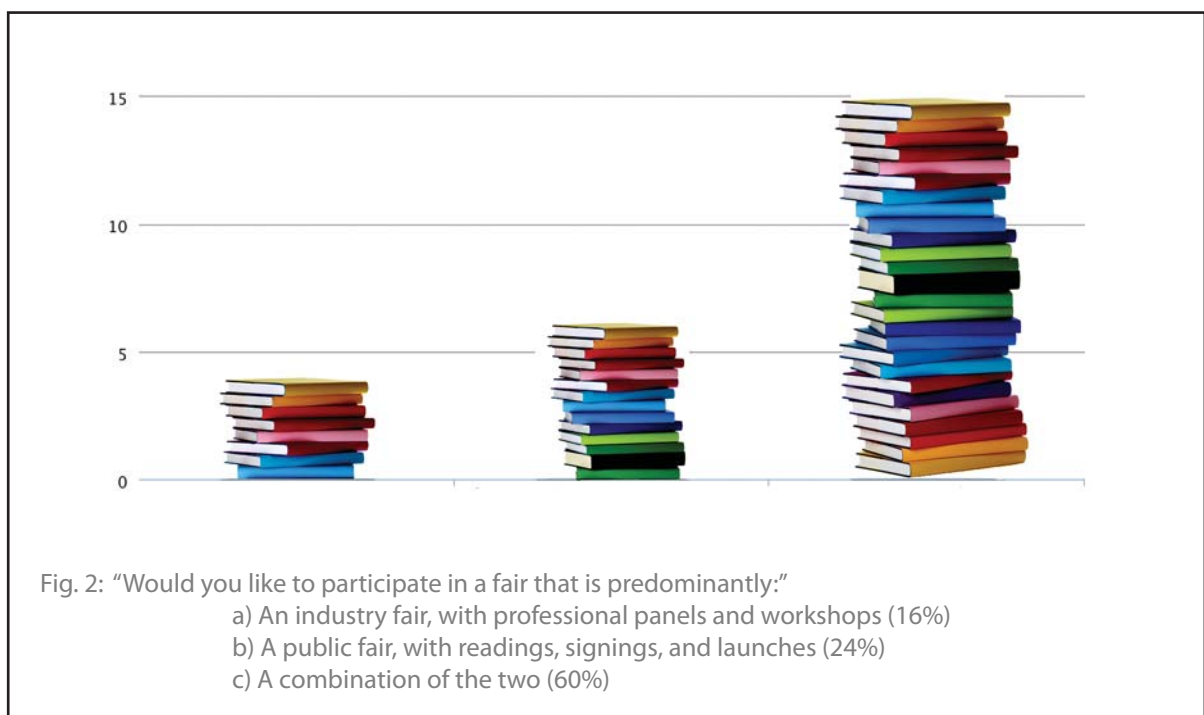
Further to our research locally and internationally and further to advice received from the book sector and other experts, we believe that a re-imagined book fair could be a galvanizing event for the publishing industry in English-language Canada.

In keeping with successful models elsewhere, it is recommended that the Toronto Book Fair model include a significant public component and encompass all genres of books. Based on best practices observed elsewhere, strong programming and reasonable entry fees, along with profiling of marquee authors and others, are recommended as a draw for the public, which will provide publishers with the massive opportunity to sell their front lists to a large audience. Both admission and exhibition fees should be kept at a moderate level to encourage public and industry participation.

Similar to the Salon du livre de Montréal, the Fair should run from Thursday through Sunday. A gala opening could be scheduled for the Wednesday evening. A possible schedule, derived from the various models, would have industry focus and professional programming on Thursday with the public invited to attend in the evening; focus on schools on Friday with public programs in the evening; and Saturday and Sunday devoted to public attendance and programming.

As described by many we interviewed, the Fair could act as the scene where the industry convenes: where its members meet with each other, both formally and informally, and where the industry can connect with the public. As at all fairs studied, the Fair should provide opportunities for skills development, both in the traditional profession and in the fast-paced, evolving world of the new business model, with programming occurring throughout the four days.

The main part of the Fair could take place in a large venue such as the North Building of the Metro Toronto Convention Centre. Similar to the Turin model, a Fringe Festival could also be programmed in venues such as libraries and bookstores as well as non-traditional book venues across the city.



HIGHLIGHTS | Public Programs

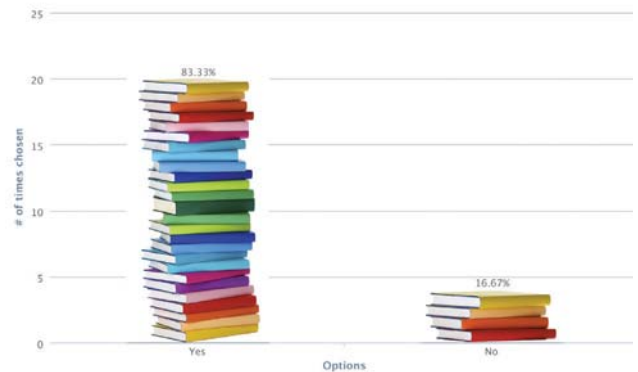
As with Montréal, Paris, Turin, Guadalajara and others, programming should feature **the book as the star**. At the central location as well as at any of the satellite programming sites for the Fair, programming will drive attendees with opportunities to discover and purchase books.

Author Readings and Appearances

Publishers will have an opportunity to showcase their authors through readings, discussions and book signings. This ability to connect with favourite and newly discovered writers is a powerful draw across genres.

A Literary Salon (à la Montréal) with marquee authors and book launches will be programmed throughout the Fair. As well, other readings and signings will take place in designated areas.

When polled, 83% of book publishers said they would like to bring their authors for a book signing.



Would you bring your authors for a book signing?
Yes: 83.3% No: 16.7%



Children / Youth Court

The Fair, like all public facing fairs studied, will feature a strong children's and YA book component, with educational programs serving elementary, high school, college and university students. A "Youth Court" will be programmed throughout the Fair with a special education day dedicated for school visits. Conversations with Boards of Education representatives were very encouraging and it will be important to include them in early planning stages.

Third Language and Multiculturalism Programming

Following the advice of our Advisory Committee, the Fair should take advantage of Toronto's unique multicultural diversity. With a population nearing 3 million, Toronto is considered one of the most multicultural cities in the world. Over 140 languages and dialects are spoken here, and over 30 percent of Toronto residents speak a language other than English or French at home. This cultural richness offers the Toronto Book Fair a myriad of opportunities to program locally for an already existent international community. The Fair can take a unique leadership role by coordinating current programs of culture institutes like Instituto Italiano di Cultura in Toronto, the Goethe Institut-Toronto, and others. With input from community leaders, university departments and cultural centres, the Fair can reach underserved communities who are interested in book culture both in English and in their own language. This programming would be a crucial first step in the creation of an international component to the Fair; moreover, it would attract foreign publishers who currently overlook Toronto's literary opportunities. It will also help Canadian publishers to market their translations to members of third-language communities who read in English.

• **First Nations, Métis and Inuit Literature Programming** •

Further to our discussions with other fair organizers, a fair should look for unique programming that may not be found elsewhere and we believe this would be such a program. There are over 100 publishing houses or distribution centres for First Nations, Métis and Inuit literature in Canada. Ontario has the largest aboriginal population of any province or territory. Consequently, the Toronto Book Fair hopes to create, in partnership with these communities, programming for First Nations, Métis and Inuit authors and publishers from across Canada. Publishers and booksellers would have a dedicated space to showcase their books and their authors, with opportunities for readings, panels, workshops and discussions. Over time, this unique program might be able to attract First Nations and aboriginal communities from other countries such as the USA, Mexico, Australia, and New Zealand. The fair would be happy to host literary awards like the Burt Award for First Nations, Métis and Inuit Literature.



• **Able Readers** •

The Toronto Book Fair, as recommended by some members of our consultation list, will create a dedicated space and programming for special needs readers where large print books, audio books, and other technologies and formats to facilitate reading will be featured.

• **Culinary Programs**

Culinary programs have proven increasingly popular with the public in connection with cookbooks and books on food, wine and gastronomy at fairs such as Frankfurt, Paris and Turin, and would be an attractive feature of the Toronto Fair. The Paris model (among others at Frankfurt and Turin) of a cooking square with celebrity chefs and live demonstrations proved very popular and could be easily duplicated.

• **Public Workshops**

As seen in all the public facing fairs we have reviewed as well as in other literary programs here and elsewhere, there is a strong interest from the general public on writing and in developing an understanding of the business side of getting a book published, whether in traditional or e-form. The Fair would feature programs aimed at the public on various genres of writing and on how to develop a manuscript, get an agent or publisher, and more. This will complement industry workshops and panels.

• **Cultural Programming** •

Following the examples of most public fairs, on-site programming, as appropriate, will feature concerts linked to music written for poetry, film adaptations of books, and exhibits of book design, graphic novel art, and bookbinding, among others.

A Fringe Fair (similar to Turin) could also be programmed in venues such as libraries and bookstores, as well as less traditional sites, to expand this exploration of the influence of books on and transformation into other art. Programming such as a film series from book adaptations, exhibits of book design and graphic novels, music from poetry, and other related cultural events and performances in collaboration with programming partners in the downtown and across the city, would position the Fair as part of the cultural landscape of Toronto.

HIGHLIGHTS | Industry Components

• Book Sales

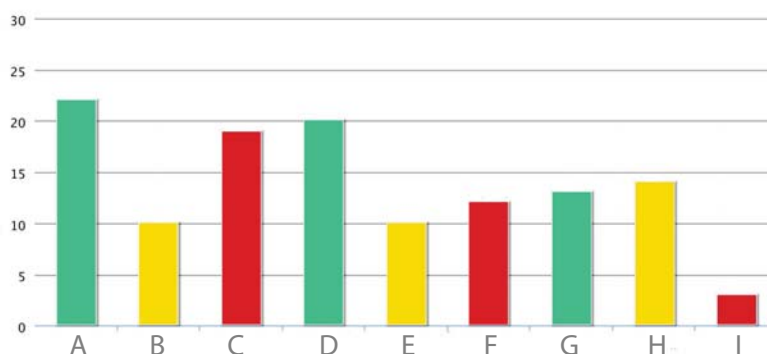
Publishers have made a clear call for their need to be able to connect directly with the public; to find ways to engage the public with their roster of books and authors; and to encourage the discoverability of books and engender the excitement of being in contact with authors.

A book fair with strong programming will not only draw the public and be a magnet for tourists, but it will also provide a forum where books are the stars in an exciting environment of shared discovery of new titles, favourite authors and inspiring programs.

As with the Salon du livre de Montréal, there will be no discounting of books at the re-imagined Toronto Book Fair.

What are some “must have” features that you would like to see in a Toronto Book Fair? Please indicate your top 5 (five).

- A) Book sales (17.9%)
- B) Access to digital publishing and multi-platform sales opportunities (8.1%)
- C) Connecting with educators (15.4%)
- D) Connecting with librarians (16.3%)
- E) Professional development workshops (8.1%)
- F) Book launches (9.8%)
- G) Networking opportunities through formal sessions (10.6%)
- H) Networking opportunities through informal sessions (11.4%)
- I) Other (2.4%)



• Booksellers

While many publishers have indicated that they would like to sell their books directly to the public at the re-imagined Book Fair, bookstores will participate in two ways: first, as representing and selling books for publishers who are unable to attend themselves or who do not wish to sell directly themselves; secondly, specialty booksellers will be encouraged to take booths to showcase and sell their niche and specialized books. Publishers who do not wish to sell directly themselves will have the added option to sell their titles through their distributors present at the Fair, as is the case at the Salon du livre de Montréal.

• Digital Zone

The Toronto Book Fair (as at every fair studied) will include a dedicated space that will explore and discuss innovations in the digital distribution of books, and highlight digital development, transmedia projects, new technologies and applications. The Digital Zone will include such programs as Adaptation Workshops that will concentrate on film, television, gaming and other cross-media potential and opportunities.



• Professional Development

Professional development seminars and events will offer industry attendees with wide-ranging, in-depth educational workshops, seminars and demonstrations. Topics and experts will provide insights into new skills as well as greater knowledge of industry issues. Dedicated networking events will also be made available for collegial interaction and less formal learning opportunities.

An Incubator Program (similar to those in Turin and Frankfurt) focused on new publishers in business for less than three years would deliver comprehensive assistance, coaching and mentoring to emerging publishers.

Consideration should be given to partnering with the Frankfurt Book Fair Academy Program.



• Association Events and Awards

As suggested during our consultation, literary associations would have the opportunity to host their annual meetings under the Fair's umbrella and in coordination with other similar organizations. Special rates could apply to membership of those organizations. Cost savings to the associations, as well as the incentive the Fair would offer for attendance by their members, would benefit both members and organizations.

Consideration should be given to approaching a number of existing literary awards to present their prizes at the Fair.

In addition, a new literary prize should be created specific to the Book Fair.

• Writer Workshops and Lectures

In partnership with Humber's School for Writers (who currently program for WOTS and IFOA), a series of lectures and workshops would create popular programs aimed at new and aspiring writers in settings that inform and provide instant feedback on ideas, pitches, self-promotion and manuscript excerpts. This has proved to be a popular addition to literary festivals and book fairs.



• Rights

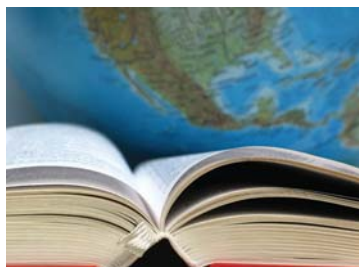
In the first year or two of the Fair, rights sales will be limited to multi-platform/trans-platform and Canadian French and English publishers' translations sales. Québec publishers have shown an interest in such an event. If conditions are conducive, consideration should be given to developing an international rights component in future years. In the meantime, a Fellowship program (see below) would act as a way to introduce international agents and publishers.

• Fellowship Program

Similar to the successful fellowship programs of Frankfurt, Turin, Rome and Jerusalem, the Toronto Book Fair could offer a Publishing Fellowship program for about 20 foreign publishers, editors and agents.

The program would last approximately one week, commencing on the Monday before the Book Fair and ending on the last day of the Fair. The Toronto Book Fair and various sponsors would cover travel expenses within Canada, accommodation, and partial meal expenses. Travel to and from Canada would not be included. This program would give these “fellows” an opportunity to participate at the Fair through readings, panels and workshops. They would meet Canadian authors and publishers in formal and informal settings, and be immersed in the Canadian cultural and literary landscape. Discussions with our Advisory Committee and people on our consultation list show that there is nothing but praise for fellowship programs.

This proposed Toronto Book Fair Fellowship echoes that of the impressive International Visitors Programme currently put on by HarperCollins and the International Festival of Authors (IFOA) at the Harbourfront Centre in Toronto. The Toronto Book Fair would like to partner with the IV Programme to further enhance and build upon this existing structure.



• Featured Country

Following the example of all major international book fairs, the Toronto Book Fair will feature each year a different country or groups of countries, providing them with a dedicated space to exhibit their culture, showcase their authors, and sell their books. The featured country will have the opportunity to connect with Toronto’s multicultural communities and will contribute to the Fair’s literary programming. This featured country component

will enable Canadian publishers to interact with the cultural industries of a foreign nation, discover new books and works, and consequently enhance their own international program.

• Featured Canadian Region

Each year (similar to Turin), a region of Canada will be featured at the Fair. This will provide, on a rotating basis, a chance for publishers from across Canada to receive special focus and promotional opportunities. It is recommended that Québec be the Featured Region for the inaugural Fair. In addition to highlighting publishers, books and authors from each region, programming potential exists to link regionally focused culinary events and other cultural programs.



• 20/20 CAN LIT

This unique program will focus on twenty Canadian authors under the age of 40, and twenty Canadian authors over the age 40, who have made or are making a significant contribution to Canadian literature. The Canadian publishing industry and Canadian readers would help choose this group of forty Canadian authors. The 20/20 group would participate in readings, discussions and panels dedicated to Canadian literature.

Networking and the Face-to-Face Encounter

Perhaps most importantly, in a virtual world, book fairs are a place where the vital “non-virtual” face-to-face encounter can take place.

“A face-to-face conversation is what often gets you the deal.”

The internet has made a difference to the way rights are sold, which means that there is less of an emphasis on the big rights fairs. However, publishers and agents have noted that nothing replaces face-to-face meetings.

As one industry veteran remarked, “A face-to-face conversation is what often gets you the deal.”

A recent article by Evan Hughes in *Wired* pointed out what many booksellers already know: “Research has shown that readers don’t tend to use online bookstores to discover books; they use them to purchase titles they find out about elsewhere—frequently at physical stores... With no stores to browse in, publishers fear, book sales everywhere could take a significant hit.”

Book Sales

The industry told us that the ability to connect and sell directly to the public is one of the most important aspects they want from the Book Fair.

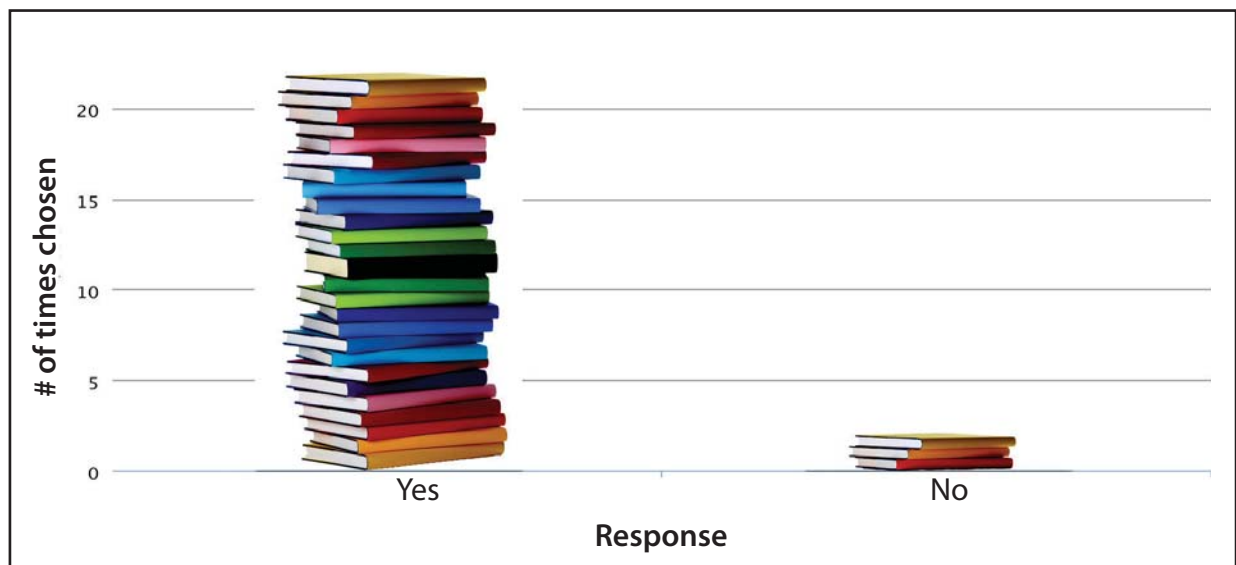


Fig. 3: “Would you want to sell books directly to the public?”
Yes (91.7%) No (8.3%)

The large population of the Toronto region is a success factor in realizing this potential. Toronto’s population is 2.79 million with a GTA catchment area of 5.5 million. As previously stated, Toronto is a city of active readers. The attendance and sales rates of current literary programming (e.g. Word On The Street, IFOA) demonstrate that there is a substantial potential for sales from Torontonians alone. Ontarians spend more on books, on a per capita basis, than residents of the other provinces (Statcan, 2010).

Multi-Platform Potential

One of the exciting opportunities that has emerged from the digital revolution is the ability to garner revenues from the sales of cross-applications in other media.

A Toronto Book Fair is perfectly positioned in the Canadian marketplace to take advantage of this growing potential. Toronto is the hub of a major and growing video gaming industry, and has long been a centre for television and film production and distribution.

The Toronto Book Fair could host events that bring these various groups together and leverage the possibilities of convergent media by developing a critical mass marketplace for multi-platform adaptation sales. The ability to bring together major local media players at the Fair would also be a draw for attendance by some international publishers and agents.

International Profile

While it will take a number of years for the Fair to gain recognition on the international stage, it has the potential, with the right mix of participants and programming, to position itself as a significant addition to the international literary scene. Toronto's concentration of media and gaming industries is a unique business opportunity that has potential to develop this international opportunity further.

Featured Country and Fellowship programs will also bring an international spotlight to Canada, and its publishers and authors, which can be built on over time.

Economic Impact Estimate

The study looked at three possible scenarios based on possible attendance, number of exhibitors and book fairs' budgets (see Appendix 1: Budget Details for rationale and economic impacts). Within each scenario the total expenditures of the Fair, the visitors to the Fair, and the exhibitors at the Fair were estimated by using national and international examples. Using those estimates, and applying the Ontario Ministry of Tourism & Culture's TREIM model, the direct impact, the indirect and the induced impact of each sector were determined to create the total economic impact for each scenario. The Ontario Ministry of Tourism & Culture's TREIM model was also used to determine job creation. (The model is found at: <http://www.mtc.gov.on.ca/en/research/treim/treim.shtml>)

The TREIM model can use one of three factors to determine the estimated economic impact of visitors to an event: Detailed Spending (per visitor), Total Spending or Total Number of Visitors. Although we had estimates of visitors' spending from other fairs, we felt that an estimate based on potential attendance would be better, since it enabled us to create three different scenarios based on realistic attendance numbers deduced from looking at other fairs.

The model has the option of determining the estimated economic impact from the operational expenses of a business by inputting a total amount, and here we plugged in what we felt was an adequate budget for a fair. We also created three scenarios.

The model allowed us to look at the economic impact of the exhibitors' operational expenses. By looking at average rental costs for space at a book fair and speaking to numerous exhibitors at various fairs, we noted that each exhibitor spent a minimum of \$5000. We chose to underestimate the average spending and use \$3000 as an average. We created three scenarios based on possible numbers of exhibitors, and here we were also conservative.

The following are the three scenarios that we plugged into the TREIM model and the resulting estimated economic impact.

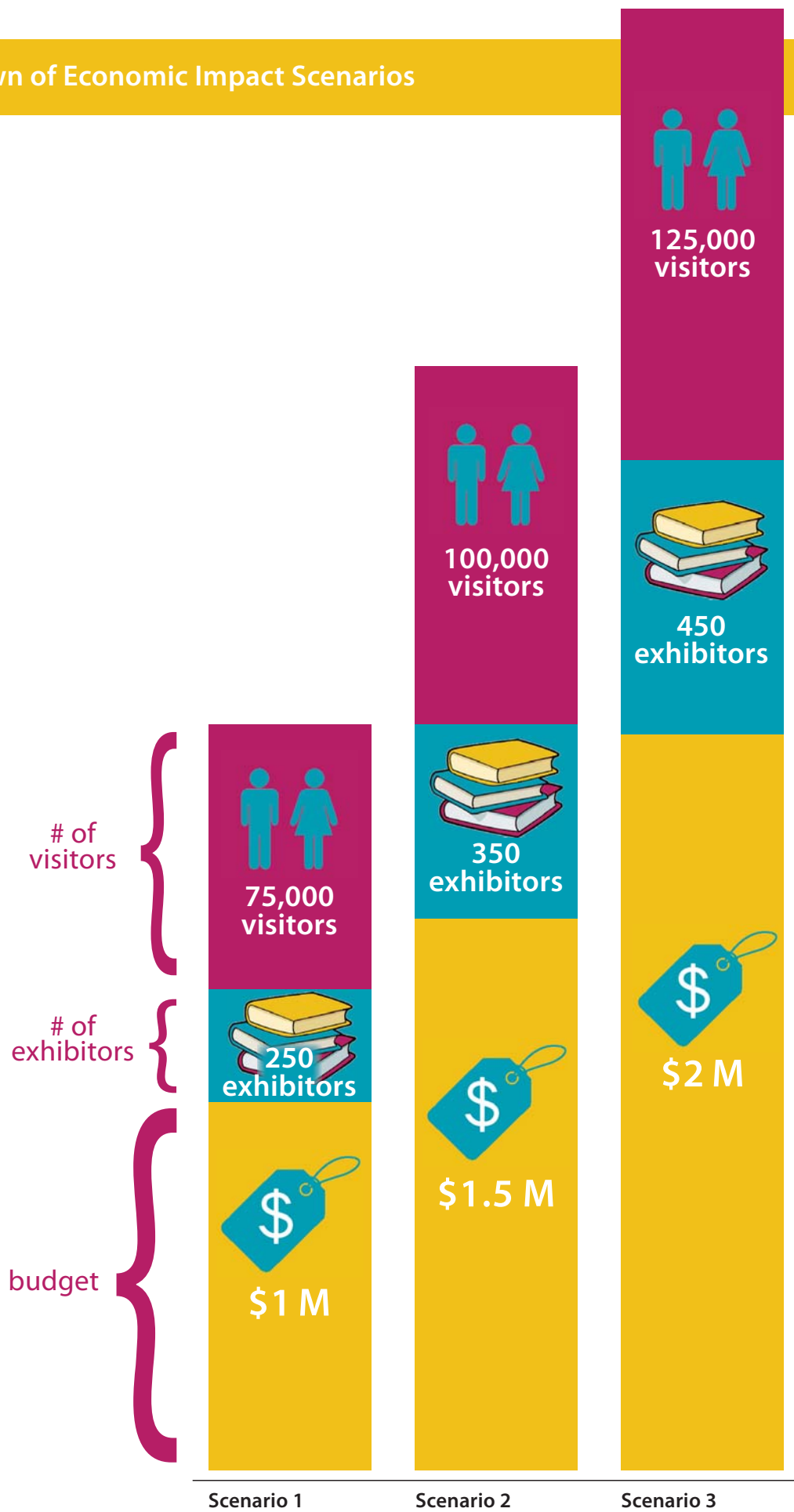
Scenario 1: Attendance of 75,000 visitors, with 250 exhibitors (each exhibitor spending \$3,000) and a Fair's budget of \$1 million. **Estimated total economic impact on GDP and employment: \$23 million and 365 full-time equivalent units of work.**

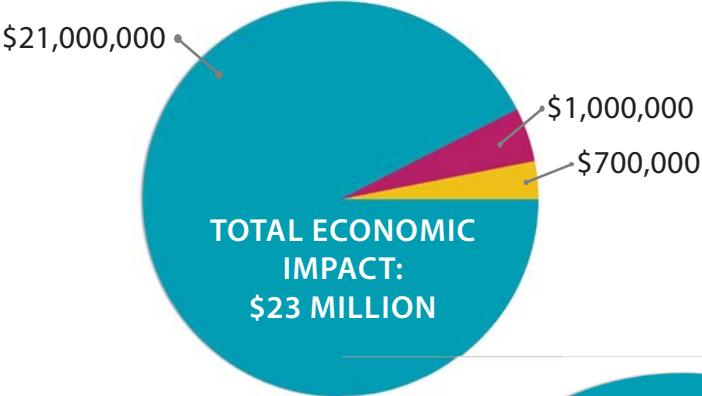
Scenario 2: Attendance of 100,000 visitors, with 350 exhibitors (each exhibitor spending \$3,000) and a Fair's budget of \$1.5 million. **Estimated total economic impact on GDP and employment: \$31 million and 485 full-time equivalent units of work.**

Scenario 3: Attendance of 125,000 visitors, with 450 exhibitors (each exhibitor spending \$3,000) and a Fair's budget of \$2 million. **Estimated total economic impact on GDP and employment: \$39 million and 601 full-time equivalent units of work.**

Scenarios	Expenditures	Direct	Indirect	Induced	Total	Jobs
	\$	Impact \$	Impact \$	Impact \$	Economic	created
					Impact \$	#
Scenario 1						
Visitors	\$ 25,000,000	\$ 21,411,297	\$ 5,607,419	\$ 4,946,388	\$ 21,411,297	342
Fair	\$1,000,000	\$595,871	\$132,490	\$274,879	\$1,003,240	9
Exhibitors	\$750,000	\$ 446,903	\$ 99,367	\$ 164,416	\$ 710,686	14
Total	\$26,750,000	\$22,454,071	\$5,839,276	\$5,385,683	\$23,125,223	365
Scenario 2						
Visitors	\$ 33,000,000	\$ 14,476,655	\$ 7,476,558	\$ 6,595,174	\$ 28,548,387	456
Fair	\$ 1,500,000	\$893,807	\$198,735	\$423,227	\$1,515,769	11
Exhibitors	\$ 960,000	\$ 572,036	\$ 127,190	\$ 210,452	\$ 909,678	18
Total	\$35,460,000	\$15,942,498	\$7,802,483	\$7,228,853	\$30,973,834	485
Scenario 3						
Visitors	\$ 42,000,000	\$ 18,095,819	\$ 9,345,698	\$ 8,243,955	\$ 35,685,471	570
Fair	\$2,000,000	\$1,191,742	\$264,980	\$571,654	\$2,028,376	14
Exhibitors	\$1,350,000	\$ 763,772	\$ 117,998	\$ 416,683	\$ 1,298,453	17
Total	\$18,525,000	\$20,051,333	\$9,728,676	\$9,232,292	\$39,012,300	601

Breakdown of Economic Impact Scenarios

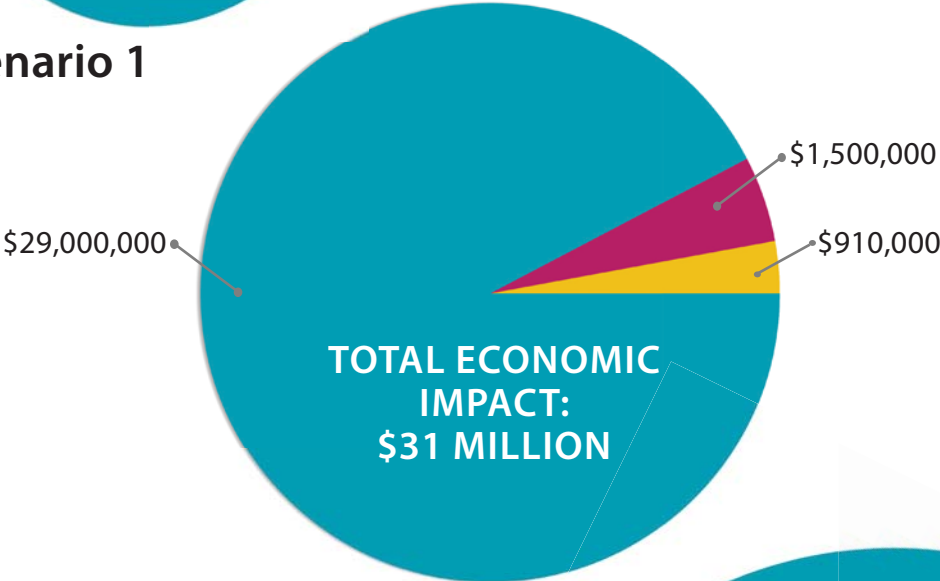




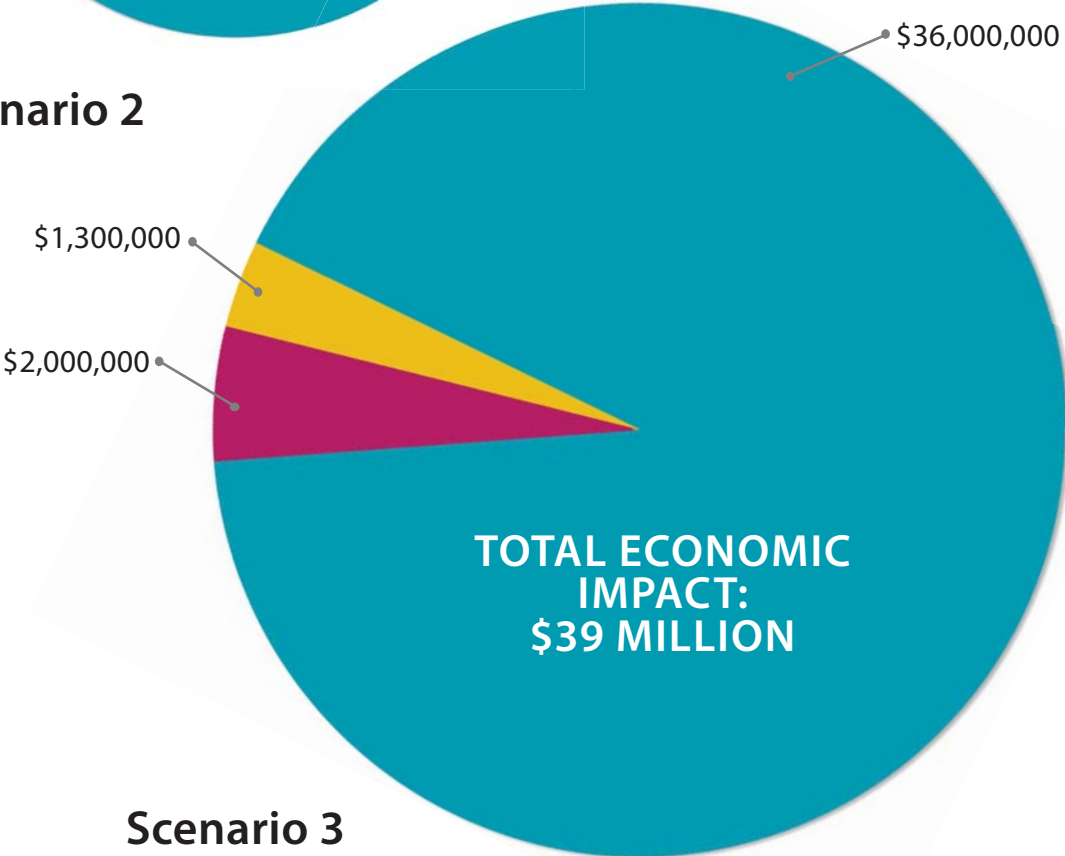
LEGEND

- \$ brought in by visitors
- \$ brought in by exhibitors
- \$ brought in from the fair directly

Scenario 1



Scenario 2



Scenario 3

Tourism Impact

“The consumer and trade show industry is one of the fastest growing sectors within the tourism industry.”

—Tourism Toronto, 2006.



A recent study commissioned by Tourism Toronto revealed that ten million overnight tourists came to Toronto in 2012. These overnight tourists attended various venues around the city. Using the venues and attractions’ internal statistics, a report conducted by Toronto’s *Grid* magazine in May 2013 determined that Nuit Blanche’s portion of overnight visitors was about 10% of their attendance, while Casa Loma’s portion was 60%. Numbers for other venues and events fell mostly between those two statistics. We estimate that the Toronto Book Fair would attract its share of overnight visitors as well as same day visitors.

The 2012 Ontario Arts and Culture Tourism Profile (conducted by Research Resolutions Consulting, Ltd.) concluded that in one year, 9.5 million overnight arts and culture tourists visited Ontario. Sixty-six percent were Canadians, 23% were Americans, and 11% were from overseas. Altogether these tourists spent \$4.1 billion. 3.8 million of those Ontario visitors (18% of the total) participated in arts festival activities which included literary, film, theatre, aboriginal, comic and music festivals—the sector that would include the Toronto Book Fair. The average arts and culture tourist outspends 2:1 other overnight tourists, while 46% of the cultural visitors said that the arts festivals were “trip drivers,” the highest percentage for all arts and culture activities. Each arts and culture overnight visitor had a \$400 economic impact on the Ontario economy. We can expect the Toronto Book Fair to be a “trip driver,” and we can also expect a similar spending pattern by overnight visitors.

A study done on behalf of Tourism Toronto in 2006 showed that over a one-year period, 8.9 million people attended trade and consumer shows; of that attendance, 2.2 million were overnight visitors, about 25% of the total. Those tourists spent \$210.21 per person per day. Of these visitors, 72.7% were from Ontario, 14.1% were from other provinces and territories, 8.4% were from the USA, and 4.8% were from overseas. This is in line with data provided by the Turin Book Fair and other festivals. Using those statistics, a Toronto Book Fair could expect to attract about 18,000 to 20,000 overnight visitors in its first year as well as a significant number of same day visitors from the GTA and vicinities. (See Full Economic Impact in Appendix 1).

In conclusion, Canadian and international studies definitively show that arts and culture visitors have a significant economic impact on the region they visit. A Toronto Book Fair would attract a healthy percentage of one day and overnight visitors, contribute to Ontario tourism, and have a significant economic impact on the GDP of Ontario.

CHALLENGES

Risk Averse Environment

A significant challenge to achieving the vision of a re-imagined book fair is the environment that the industry itself is now facing. The immense changes of the last decade have resulted in a vastly diminished distribution and bookselling network and in the closing or merging of a significant number of publishing houses. It's a sector with a diminished footprint and bottom line. Through a combination of ingenuity, flexibility and timing, those booksellers and publishers who have survived are under immense pressure simply to sustain that survival.

Therefore, while the industry has told us that the re-imagined Book Fair described here would be a significant boost to their businesses and that they support the vision, they are lacking the capacity for taking on a large-scale project and the risks that accompany it.

If implementation were to proceed, it is likely that a new entity, in partnership with existing entities, would need to be created.

BookExpo Legacy

The legacy of BookExpo's failure has left some believing that we are unable to sustain a book fair in English Canada. While a very different model is being recommended in this report, it may be difficult to convince some in the sector who are circumspect following their experience with BookExpo Canada.

Other Literary Events

There are two other major literary events in Toronto and scores of medium and small events, as well as other major literary festivals in Canada.

BookExpo America's proximity to Toronto might be a competitive factor. However, the re-imagined Fair, with its significant public facing profile, is very different from what is offered in New York.

International and Programming Competition

Well-established fairs such as London, Frankfurt and Turin—particularly the latter two—that engage in significant public programming are draws for the scant dollars available to Canadian publishers to visit and participate in a book fair.

To make the new Fair appealing to publishers, it will be important to keep their costs low, and to produce a solid business plan that can support the estimates in this report of approximately 100,000 participants. In addition, booking fresh voices and faces for professional development appearances is a challenge that will need to be met.

Funding Environment

The last and most serious challenge is the current funding environment. Both government and private sector are in a period of restraint.

However, funding requirements are not excessive and can be shared among a number of different funding sources (see p. 33). If the business plan is able to successfully demonstrate the industry and business benefits of the Fair to the sector and the local, provincial and federal economic, employment and tourism impacts, and if the marketing strategy can identify significant opportunities for sponsors, we believe that the funding goals are achievable.

An analysis of private sector investment opportunities should be undertaken in the next phase of the development of the Fair.

POTENTIAL PARTNERSHIPS

The International Festival of Authors and the Harbourfront Reading Series are strong candidates for partnership with the Book Fair. These events have developed a powerful brand and expertise in the international literary world. The IV Programme at IFOA (see Fellowship discussion on p. 24) could be the nucleus for an international component. This partnership potential should be further explored.



Word On The Street is a successful event in its own right but as a non-ticketed, outdoor, one-day event has a less defined potential relationship with the Book Fair.

The Ontario Library Association's Forest of Reading is another strong partner candidate, especially if the Fair takes place in the mid-May time slot. They have well-established and excellent outreach to primary and secondary schools and a vibrant literary engagement program with students as well as teachers.

Together, the Salon du livre de Toronto and the Toronto Book Fair could offer interesting and uniquely Canadian programming with shared French-Canadian and English-Canadian authors that have been translated, as well as other exciting literary opportunities and partnerships.

Frankfurt Book Fair's Academy Programme is a potential international partner, and would link the Toronto Fair to the Academy's international network.

Another partner candidate is Humber's School for Writers who could develop imaginative programming aimed at emerging writers and aspiring writers, similar to those programs they currently provide at WOTS and the IFOA.

Other potential partners include but are not limited to: the Association of Canadian Publishers, Bloody Words Mystery Conference, Canadian Children's Book Centre, CBC Books, BookNet Canada, Book Summit, Crime Writers of Canada (Arthur Ellis Awards), Design Exchange, Diaspora Dialogues, Kobo, Luminato, National Reading Campaign, the Organization of Book Publishers of Ontario, PEN Canada, PEN International, Salon du livre de Toronto, Toronto International Film Festival, Toronto Comic Arts Festival, Toronto Catholic District School Board, Toronto District School Board, Toronto Public Library, Toronto-area bookstores, The Writers' Union of Canada, as well as universities and colleges that have writing and publishing programs, notably Humber College's School for Writers, as suggested above, and others such as those at Centennial College, Ryerson University, York University, and the University of Toronto.

TOWARDS IMPLEMENTATION

Budget

It is estimated that the budget for the Book Fair would be between \$1–\$2 million. (See Appendix 1: Budget Details for a breakdown of the three scenarios.) This does not include the budget for the Fringe program. It is anticipated that the Fringe program would apply for funding from more traditional cultural grants programs, as opposed to industry programs.

It is estimated that start-up costs, beginning in the summer of 2013 with a Business Plan and Marketing Strategy, would be approximately \$250,000.

Potential Sources of Funding

It is anticipated that funding will comprise a combination of private investment, self-generated revenue, government, foundation, sponsorship and private philanthropy for different aspects of the Fair.

Self-generated revenue will be made up of ticket sales, booth and exhibition costs, program advertisements, as well as auxiliary non-book retail sales.

The following funders should be approached to determine their interest: City of Toronto's Economic Development and Culture Division; Tourism Toronto (e.g. for bringing in foreign journalists); Ontario Media Development Corporation; Ontario Cultural Attractions Fund; Ontario Trillium Foundation; Ontario Tourism Marketing Partnership Corporation; Ontario Ministry of Economic Development, Trade and Employment; Ontario Ministry of Tourism, Culture and Sport; Access Copyright Foundation; Department of Canadian Heritage; Federal Ministry of Trade and Investment.

Sponsorships will be an important source of the revenue mix and a strategy for private investment should be pursued.

Cultural programs and the Fringe Festival should seek funding from the Canada Council, Ontario Arts Council, Toronto Arts Council, City of Toronto, and a number of private foundations with the mandate of supporting arts and culture. Funding for special components should be sought by applying to various foreign governments' cultural programs.

Timing

An analysis of each month—focusing on local and global literary events; local large-scale cultural events; bookselling trends; and the availability of Canadian book publishers—determined that November or May are the two optimum times for a book fair in Toronto. Pros and cons for each time, shown below, will form the basis for a more in-depth review during the upcoming business planning stage.

NOVEMBER

Pros

- The opportunity to “bookend” the literary festivals (Word On The Street and IFOA) and awards that kick off the fall literary season leading up to the book fair.
- Potential to host a number of literary awards.
- Minimal local literary and cultural event competition compared to most of the calendar.
- Potential proximity to IFOA and Salon du livre de Toronto, providing partnership possibility.
- Capitalizes on the high book sales of the season, and provides a great opportunity for consumers to do holiday shopping.
- As this is a high sales period for books, publishers will identify a high return for their investment in appearing at the Fair.

Cons

- Depending on the date, may conflict with Salon du livre de Montréal which would significantly reduce attendance by Québec writers and publishers.
- Depending on the date, may conflict with the Guadalajara International Book Fair (though Guadalajara is not attended by many Canadian publishers).
- Weather may be a deterrent for the Book Fair as a tourist draw.
- Close to busy holiday season.



MAY

Pros:

- Opportunity to team up with pre-existing literary events (e.g. The Festival of Trees, Toronto Comic Arts Festival, Arthur Ellis Awards).
- Could provide an opportunity for publishers to extend their spring season and boost second-quarter sales. May is traditionally one of the months with the least amount of sales (in terms of volume) for Canadian publishers.
- Traditional timing for the AGMs of many literary associations.

Cons:

- Attempting to open a new spring market will make it harder for publishers to realize a return on their investment in participating in the Book Fair.
- BookExpo America is at the end of May; such a close timeline may force publishers to choose one event or the other.
- Turin International Book Fair is happening at the same time (however, like Guadalajara, this is not attended by many Canadian publishers).



APPENDIX 1: BUDGET DETAILS

We understand that only proper business and marketing plans can quantify more accurately the possible Revenues, Expenses and Economic Impact of having a Toronto Book Fair; however, by extrapolating from diverse, though limited, national and international sources, we were able to arrive at some rough but telling preliminary estimates. An important source of information for constructing this budget is the study conducted by the Fondazione Fitzcarraldo for the Turin Book fair (Economic Dimension of the International Book Fair, 2010) Please see the notes attached to this table for an explanation.

1. AN ESTIMATED TORONTO BOOK FAIR BUDGET WITH 3 SCENARIOS

	Scenario 1	Scenario 2	Scenario 3	Notes
	\$1 M budget	\$1.5 M budget	\$2 M budget	
Expenses				1
Rental	\$ 150,000	\$ 170,000	\$ 200,000	2
Staff at the Fair	\$ 210,000	\$ 315,000	\$ 420,000	
Staff to run the Fair	\$ 120,000	\$ 180,000	\$ 240,000	
Hospitality costs	\$ 70,000	\$ 105,000	\$ 140,000	
Communication	\$ 70,000	\$ 105,000	\$ 140,000	
Marketing, Production and Organization	\$ 380,000	\$ 570,000	\$ 760,000	
Other		\$ 55,000	\$ 100,000	
TOTAL	\$ 1,000,000	\$1,500,000	\$ 2,000,000	3
Revenues				4
Exhibitors #	250	350	450	5
Attendance #	75,000	100,000	125,000	6
Entrance fees	\$ 350,000	\$ 500,000	\$ 625,000	7
Exhibitors' fees \$	\$ 375,000	\$ 525,000	\$ 675,000	8
Advertising \$	\$ 50,000	\$ 100,000	\$ 200,000	
Funders \$	\$ 100,000	\$ 150,000	\$ 200,000	9
Sponsors \$	\$ 125,000	\$ 225,000	\$ 300,000	10
TOTAL \$	\$ 1,000,000	\$1,500,000	\$ 2,000,000	11

Notes:

1. Expenses are based on a realistic budget for similar events in Canada and other countries and on the Turin economic model (the only fair with full budget details available). That model, created by Fondazione Fitzcarraldo in their study, Economic Dimension of the International Book Fair, 2010, used the following categories and percentages: Rental, 15% of budget; Staff at the Fair, 21% of budget; Staff to administer the Fair, 12% of budget; Hospitality costs, 7% of budget; Communication, 7% of budget; Marketing, production and organization of the Fair, 38% of budget.

2. Rental is not a direct percentage for Scenario 2 and 3 due to economies of scale.

APPENDIX 1: BUDGET DETAILS

3. The totals are more realistic than the individual categories which are meant as rough guidelines and therefore subject to change.
4. Revenues are based on projections extrapolated from the industry, but we caution that they are simple estimates at best.
5. Exhibitors are estimated on the basis that Word On The Street has had 250 exhibitors; Salon du livre de Montréal, 900; and Turin, 1,400.
6. Attendance numbers are estimated on the basis of attendance at Word On The Street (200,000), Salon du livre de Montréal (125,000) and Turin (300,000) among others.
7. Entrance fee should be between \$8 (Montréal) and \$12 (Europe); we estimate \$10 as an affordable entrance fee. Because of discounted tickets and free tickets, revenues would probably be half or less than listed entrance fee (as supported by the Turin study). We are estimating collecting 50% of listed entrance fee, which would be \$5 per entrance.
8. Exhibitors' fees were determined by multiplying the number of exhibitors by \$1500, which is the cost we feel is affordable to them for an empty 10 feet by 10 feet space. There might be other options to the exhibitors that would create higher revenues for the Fair.
9. We noted that government funding for similar cultural entities—WOTS, Salon du livre de Toronto, Salon du livre de Montréal, Blue Metropolis Literary Festival and others—was about 10% of their budget and we used that estimate.
10. Corporate sponsorship will be a challenge, but those will be the targets to meet in order to balance the budget.
11. These totals are meant as guideposts since some categories like entrance fees, exhibitors' fees and funding are estimates based on similar events, while the other categories are more speculative and mostly targets to reach.

2. FULL ECONOMIC IMPACT OF A TORONTO BOOK FAIR

The Ontario Ministry of Tourism & Culture's TREIM model was used to determine the overall estimated economic impact of the Toronto Book Fair.

(<http://www.mtc.gov.on.ca/en/research/treim/>)

The study looked at three possible scenarios based on possible attendance, number of exhibitors and the Book Fair's budget. These three scenarios and the estimated attendance, exhibitors, and budgets within them were arrived at by an analysis of the seven national and international fairs we covered in this study and through conversations with various literary festivals and book fair organizers.

We used the TREIM model to estimate the economic impact of visitors to the Fair, of the Fair's operational expenses and the exhibitors' operational expenses to participate in the Fair.

Visitors

The TREIM model can use one of three factors to determine the estimated economic impact of visitors to an event; Detailed Spending (per visitor), Total Spending, or Total Number of Visitors. Although we had estimates of visitors' spending from other fairs, we felt that an estimate based on potential attendance would be more accurate, and it enabled us to create three different scenarios based on different attendance numbers extrapolated from other fairs and literary festivals. We used 75,000, 100,000, and 125,000 as the possible number of visitors attending the fair. For the purpose of this impact study, we decided not to attempt to determine overnight visitors, although there will be some, and to assume low outside of Ontario visits, at 8%, and outside of Canada visits at 2%; therefore we expect that the impact should exceed our estimates.

Book Fair Budget

The model has the option of determining the estimated economic impact from the operational expenses of a business by inputting a total amount, or detailed amounts, and here we plugged in what we felt was an adequate budget for a successful fair. Here we also created three scenarios, one of \$1 million for a smaller fair, one of \$1.5 million for a mid-sized fair and one of \$2 million for a larger fair. The model plugged in cultural industries' averages where necessary in order to estimate the general impact.

Book Fair Exhibitors

The model also allowed us to look at the economic impact of the exhibitors' operational expenses. By looking at average rental costs for space at a book fair and speaking to numerous exhibitors at various fairs, we noted that each exhibitor spent a minimum of \$5000, often for a single ten feet by ten feet space. We chose to underestimate the average spending and use \$3000 as an average and be on the safe side. We created three scenarios based on possible numbers of exhibitors, 250, 350, and 450 and here we were also conservative as other fairs easily have two and three times that number of exhibitors.

The TREIM model was also used to split the impact into three sections: visitors, exhibitors and the Fair itself. Each section shows the three scenarios.

APPENDIX 1: BUDGET DETAILS

1. Visitors

We estimated the number of visitors for each scenario and the TRIEM model provided all the impacts.

Scenario 1	Scenario 2	Scenario 3
75,000 visitors	100,000 visitors	125,000 visitors
Total Visitors' Spending \$ 25,192,613	Total Visitors' Spending \$ 33,590,150	Total Visitors' Spending \$ 41,987,688
Gross Domestic Product (GDP)	Gross Domestic Product (GDP)	Gross Domestic Product (GDP)
Direct \$ 10,857,491	Direct \$ 14,476,655	Direct \$ 18,095,819
Indirect \$ 5,607,419	Indirect \$ 7,476,558	Indirect \$ 9,345,698
Induced \$ 4,946,388	Induced \$ 6,595,174	Induced \$ 8,243,955
Total \$ 21,411,297	Total \$ 28,548,387	Total \$ 35,685,471
Labour Income	Labour Income	Labour Income
Direct \$ 7,134,056	Direct \$ 9,512,075	Direct \$ 11,890,094
Indirect \$ 3,798,000	Indirect \$ 5,064,000	Indirect \$ 6,330,000
Induced \$ 3,133,847	Induced \$ 4,178,456	Induced \$ 5,223,063
Total \$ 14,065,903	Total \$ 18,754,531	Total \$ 23,443,156
Employment (Jobs)	Employment (Jobs)	Employment (Jobs)
Direct 222	Direct 296	Direct 370
Indirect 65	Indirect 87	Indirect 109
Induced 55	Induced 73	Induced 91
Total 342	Total 456	Total 570
Direct Taxes	Direct Taxes	Direct Taxes
Federal \$ 2,634,958	Federal \$ 3,513,276	Federal \$ 4,391,593
Provincial \$ 2,652,918	Provincial \$ 3,537,224	Provincial \$ 4,421,530
Municipal \$ 17,045	Municipal \$ 22,727	Municipal \$ 28,409
Total \$ 5,304,921	Total \$ 7,073,227	Total \$ 8,841,533
Total Taxes	Total Taxes	Total Taxes
Federal \$ 5,395,862	Federal \$ 7,194,474	Federal \$ 8,993,082
Provincial \$ 4,360,741	Provincial \$ 5,814,320	Provincial \$ 7,267,898
Municipal \$ 65,940	Municipal \$ 87,920	Municipal \$ 109,900
Total \$ 9,822,543	Total \$ 13,096,714	Total \$ 16,370,880

APPENDIX 1: BUDGET DETAILS

2. Exhibitors

We estimated the **number** of exhibitors for each scenario, while keeping the average spending per exhibitor fixed. The TRIEM model provided all of the impacts.

Scenario 1	Scenario 2	Scenario 3
250 Exhibitors	350 Exhibitors	450 Exhibitors
\$3000 total expenditures each	\$3000 total expenditures each	\$3000 total expenditures each
Total Revenue \$ 822,163	Total Revenue \$ 1,052,368	Total Revenue \$ 1,373,251
Gross Domestic Product (GDP)	Gross Domestic Product (GDP)	Gross Domestic Product (GDP)
Direct \$ 446,903	Direct \$ 572,036	Direct \$ 763,772
Indirect \$ 99,367	Indirect \$ 127,190	Indirect \$ 117,998
Induced \$ 164,416	Induced \$ 210,452	Induced \$ 416,683
Total \$ 710,686	Total \$ 909,678	Total \$ 1,298,453
Labour Income	Labour Income	Labour Income
Direct \$ 322,076	Direct \$ 412,257	Direct \$ 717,129
Indirect \$ 69,084	Indirect \$ 88,427	Indirect \$ 79,082
Induced \$ 103,669	Induced \$ 132,696	Induced \$ 264,526
Total \$ 494,829	Total \$ 633,381	Total \$ 1,060,737
Employment (Jobs)	Employment (Jobs)	Employment (Jobs)
Direct 11	Direct 14	Direct 11
Indirect 1	Indirect 2	Indirect 1
Induced 2	Induced 2	Induced 5
Total 14	Total 18	Total 17
Direct Taxes	Direct Taxes	Direct Taxes
Federal \$ 101,220	Federal \$ 129,562	Federal \$ 168,058
Provincial \$ 74,703	Provincial \$ 95,620	Provincial \$ 134,492
Municipal \$ 896	Municipal \$ 1,146	Municipal \$ 1,733
Total \$ 176,819	Total \$ 226,328	Total \$ 304,283
Total Taxes	Total Taxes	Total Taxes
Federal \$ 173,631	Federal \$ 222,248	Federal \$ 293,758
Provincial \$ 118,213	Provincial \$ 151,312	Provincial \$ 223,886
Municipal \$ 2,232	Municipal \$ 2,857	Municipal \$ 5,335
Total \$ 294,076	Total \$ 376,417	Total \$ 522,978

APPENDIX 1: BUDGET DETAILS

3. The Book Fair

We estimated a **budget** for each scenario. The TRIEM model provided all the impacts.

Scenario 1	Scenario 2	Scenario 3
\$1M fair budget	\$1.5M fair budget	\$2M fair budget
Total Revenue \$ 1,096,217	Total Revenue \$ 1,644,325	Total Revenue \$ 2,192,433
Gross Domestic Product (GDP)	Gross Domestic Product (GDP)	Gross Domestic Product (GDP)
Direct \$ 595,871	Direct \$ 893,807	Direct \$ 1,191,742
Indirect \$ 132,490	Indirect \$ 198,735	Indirect \$ 264,980
Induced \$ 274,879	Induced \$ 423,227	Induced \$ 571,654
Total \$ 1,003,240	Total \$ 1,515,769	Total \$ 2,028,376
Labour Income	Labour Income	Labour Income
Direct \$ 429,435	Direct \$ 644,152	Direct \$ 858,869
Indirect \$ 92,112	Indirect \$ 138,168	Indirect \$ 184,223
Induced \$ 176,219	Induced \$ 271,773	Induced \$ 367,380
Total \$ 697,765	Total \$ 1,054,092	Total \$ 1,410,473
Employment (Jobs)	Employment (Jobs)	Employment (Jobs)
Direct 4	Direct 4	Direct 4
Indirect 2	Indirect 3	Indirect 4
Induced 3	Induced 5	Induced 6
Total 9	Total 11	Total 14
Direct Taxes	Direct Taxes	Direct Taxes
Federal \$ 115,850	Federal \$ 170,261	Federal \$ 224,671
Provincial \$ 99,604	Provincial \$ 149,406	Provincial \$ 199,209
Municipal \$ 1,194	Municipal \$ 1,791	Municipal \$ 2,388
Total \$ 216,648	Total \$ 321,458	Total \$ 426,268
Total Taxes	Total Taxes	Total Taxes
Federal \$ 204,245	Federal \$ 301,487	Federal \$ 398,745
Provincial \$ 166,648	Provincial \$ 251,741	Provincial \$ 336,847
Municipal \$ 4,041	Municipal \$ 6,270	Municipal \$ 8,501
Total \$ 374,934	Total \$ 559,499	Total \$ 744,093

APPENDIX 2: BOOK FAIRS SYNOPSIS

The following is a short synopsis of the seven fairs we studied.

Salon du livre de Montréal

Canada's Salon du livre de Montréal is an established and very successful French-only public fair that is primarily consumer-oriented. It has a \$2 million budget, runs for six days, and offers affordable entrance fees (\$8) for the public. It is a medium-sized fair with 120,000 visitors, including 18,000 children and students, and presents over 900 exhibitors. The programming of Salon du livre is primarily literary, with 250 panels, discussions and readings; only a few events are dedicated to industry professionals. The Salon yearly honours a group of established authors that cross various genres; celebrates Québec's oldest publishing houses; and programs around both literary and political themes. It caters to children and students through appropriate programming in dedicated areas, such as the Art of Illustrations for young people and Princesses and Pajamas. The Salon actively promotes the discoverability of Québécois titles and fosters continuous book signings (over 1,500 authors attend) in order to facilitate significant interaction between authors and visitors. Books are sold by publishers and distributors. Salon du livre de Montréal also hosts eight of Québec's literary prizes.

<http://www.salondulivredemontreal.com/>

Guadalajara Book Fair

The Guadalajara Book Fair (FIL) in Mexico is a profitable international fair that over a period of ten days offers public, professional, rights, and educational components in fairly equal proportions. This comprehensive fair is a gateway for international publishers to access the literature of Latin American countries. It is a very large fair, with 700,000 visitors, including 100,000 children and students, and over 2,000 exhibitors from over 80 countries. It is run by the University of Guadalajara and has a strong academic slant. It includes a featured country which is given a prominent space; many large national, international, and university stands, book launches, and presentations; and a variety of programming aimed both at the public (Readers Present, Salón de Novedades, and Pages from the World) and at industry professionals (University and Academic Press International Forum; Illustrators Program; Translators' Congress; International Colloquium of Librarians; Reading Promoters Conference; Rights Workshop). The fair provides very active rights and professional zones (Ibero-American Rights Market). With negligible entrance fees, the fair's aim is to "create" readers and ignite a passion for books. They do this by bringing in well-known Spanish-speaking and international authors (heard in simultaneous translation), as well as public figures; by delivering exciting themed programming; and by creating a dedicated area for children and students which provides for their reading needs. Guadalajara International Book Fair has dedicated public and professional days, and includes a small cultural component (Foro FIL Concert Series) as well as an outreach program into schools and the community at large (Fil Youth, Filantropia, and The Pleasure of Reading program). Major awards are also presented during the fair. <http://www.fil.com.mx/ingles/>

London International Book Fair

The London International Book Fair, run by Reed International, is an example of a thriving international book fair entirely dedicated to book industry professionals. It situates itself as the spring counterpoint to the Frankfurt Book Fair, and attracts 25,000 professional visitors from 133 countries. It is well-attended by Canadian English-language publishers and is a key fair for buying and selling rights to titles written or translated into English. Over four days, 250 programs are geared to the members of the book industry and are themed around issues such as the digital world (Digital Zone & Theatres), international rights (International Rights Centre), translations (Literary Translation Centre) and challenges to the publishing industry (Publishing Solutions). Authors participate in many workshops and panels. Literary prizes are presented and shortlists are announced. Some events are ticketed separately: IPA Education Conference; Digital Minds Conference (standard price: £399); and Introduction to Rights Workshop (tickets £95). They also have a Cookbook Zone dedicated to culinary books and programming. For a steep entry fee, the public may attend, but the fair does not market itself to the public.

<http://www.londonbookfair.co.uk/>

Turin Book Fair

In Italy, the Turin Book Fair runs for five days and is an international fair with a major public focus; a small but growing trade sector; a dedicated educational component; and a vibrant cultural segment. With a budget of about \$6 million and organized by Turin's Foundation for Books, Music, and Culture, this fair is one of the largest consumer book fairs in Europe, with 300,000 visitors and 1,400 exhibitors housed in five pavilions and 26 rooms. Most of their programming is for the public, which gives publishers and their authors a chance to sell books, and to meet and interact with readers in many different ways. Like other fairs, each year the Turin Book Fair hosts a different foreign country; they also feature an Italian region. They have dedicated areas for children and students (Bookstock Village); culinary arts (Casa Cookbook); rights and professional meetings (Incontri professionali); the future of books (Book to the Future); and have recently added space for new and independent publishers. They coordinate cultural programs and events in venues outside of the fair's central location (The Salone Off). Dedicated professional programming is offered through their International Book Forum, their AdapLab, and their Fellowship Program. Originally modelled after Salon du livre de Paris, the Turin Book Fair has of late surpassed it. The entrance fee is a modest ten euros.

<http://en.saloneibro.it/>

BookExpo America

BookExpo America is now regularly held in New York City, and is run for four days by Reed International. In some ways, it is the American equivalent of the London Book Fair as it is mostly a trade fair. With 22,000 verified industry professionals, 2,000 exhibitors, 500 authors, 60 conference sessions, and attendance from over 80 countries, it continues to be a very important book event in the USA where publishers can still showcase new titles to booksellers. It features an International Rights Center, a Conferences on Global Market Forum; Digital Publishing; Publishers' Launch; uPublishU; Bloggers Conference; NYLA [New York Library Association] Conference, and a Library Journal Day of Dialog giving publishers and librarians a chance to network. Facing a decline in size and relevance, it has added a number of components and partnerships in efforts to attract a larger and more diverse crowd. A recent feature, sponsored by the Chicago International Remainder and Overstock Book Exposition, is the CIROBE Pavilion, a dedicated space for unique and hard-to-find products including books, music, and sidelines. 2013 marks the first time that the fair is offering some programming for the public through a feature called Power Readers, with a \$50 entrance fee. Yet BookExpo's programming continues to cater mostly

APPENDIX 2: BOOK FAIRS SYNOPSIS

to those in the industry—booksellers and retailers, librarians and educators, rights and international professionals, publishers and industry professionals— and not to the public.

<http://bookexpoamerica.com/>

Frankfurt Book Fair

The Frankfurt Book Fair, run by a subsidiary of the German Publishers and Booksellers Association, is the acknowledged leader in the international book market for its trade and rights component. In recent years it has worked hard to become more accessible to the public through components such as their gourmet and travel galleries, and Hall 4.1, an area for Fine Arts. In effect, it is becoming what the Guadalajara Fair is to Latin America, except that the Frankfurt Fair reaches further worldwide and is more multilingual. It is housed in ten large exhibition halls. With 300,000 visitors from over 130 countries and 7,000 exhibitors from over 90 countries, for four days it is considered the go-to fair in Europe, particularly for Canadian publishers. It programs for the public, with its well-stocked literary salons and dedicated areas for children and students (Children's and Young Adult Media Forum/Hall 3.0). It also programs for the industry with its rights and license centres, digital (Frankfurt SPARKS/ Hot Spot Digital Innovation) and translation spaces (Weltempfang/Centre for Politics, Literature and Translation), among other features such as The Booksellers Centre and International Library Centre. It offers various international outreach programs such as its Academy, its renowned Fellowship Program, and Litprom— an invitation program for small publishers from Asia, Africa & Latin America. At sixteen euros, it has one of the highest entrance fees for the public of all the major international fairs.

<http://www.buchmesse.de/en/fbf/>

Salon du livre de Paris

France's Salon du livre de Paris, run by Reed International, is a large consumer fair catering to the public. It includes an international element as well as a burgeoning professional and rights component. It hosts 1,200 exhibitors and attracts 200,000 visitors, including 35,000 trade visitors and 20,000 students. For four days (once six but recently shortened to four), the fair is recognized as the largest bookstore in France. It is host to a featured country as well as an international city. It showcases various French regions, which all have specific spaces for their publishing and bookselling associations; there are also dedicated spaces for culinary books, rare books, and art books, respectively. Francophone countries and several countries like Brazil and Saudi Arabia are well-represented with large stands, but there are also many smaller international stands, including the USA who recently made its return after a long absence. The fair has a strong academic component with dedicated areas and programming for children and students, engaging them with book vouchers, having them vote for their favourite authors, and other such initiatives. They also have dedicated programming for librarians and bookstores. Paris is expanding its rights sector and professional programming; translations are given a dedicated day of business before the fair opens, while other industry programming, such as selling film rights, or digital book events, occur throughout the four days. Much like other public fairs, Salon du livre de Paris focuses on facilitating exciting and meaningful interaction between authors and readers, offering as many readings and book signings as possible. At ten euros, it is a very affordable fair for the public.

<http://www.salondulivreparis.com>

February 6

The inaugural meeting on February 6 was the first where the Committee discussed whether a need exists for a Toronto book fair. All members agreed that the industry would benefit from the reintroduction of a book fair that had the right components. The Committee asked the research team to review the best practice models for the balance between public and industry, and investigate multi-platform and digital elements. The Committee also asked the research team to analyze the pros and cons of introducing an international rights component. Other points raised at the meeting included that there should be no discounting or remaindering of books, that the Fair should be a cultural event, and that it should reach out to Toronto's diverse communities.

March 13

Discussion at the meeting focused on industry and public components, partnerships, possible date, and success factors. The Advisory Committee determined that, due to the difficulties faced and expenses incurred by an inaugural fair to draw the international market, it should not initially contain an international rights component. However, French and English Canada rights could be a feature of the fair.

A consensus emerged for developing a public focus allowing for publishers to interface with the public and sell to them either directly or with booksellers at the fair. All genres of books should be featured and strong programming, including programming for children and young audiences, should be offered. The Committee narrowed down two possible times for the fair, in the fall (November) and spring (May).

May 6

The Committee advised that the Fair must appeal both to the multinationals and the independent sector, offering equal opportunities for representation and sales. It was also determined that the Toronto Book Fair should have a strategy in place for incorporating a rights component after its first year or two. Central to the Fair's vision is to reconnect the public with the joy and enchantment of reading, and programs should make the book the star of the fair.

An argument was put forward for a fall date to capitalize on the fall book-buying season. Some Committee members pointed out that there is an urgent need for reinvigoration of the book industry and there should be no time lost in developing the Fair, promoting 2014 or 2015 as dates for the first event.

APPENDIX 4: PUBLISHERS' SURVEY

A survey questionnaire was devised, with input from the Advisory Committee, containing questions about the participants' past book fair experience, their expectations of the opportunities offered (e.g. networking, book sales, and interacting with the public), and their opinion on when the fair should take place. The questionnaire was distributed and the results were tallied with KwikSurvey, an online research tool. The final tally revealed that the survey had a 39% response rate, a higher online response than the average survey (average response is 30-35% - "The adequacy of response rates to online and paper surveys: what can be done?" by Duncan D. Nulty. www.uaf.edu, studies by the University of Texas through their IAR studies, and studies by www.surveys.com).

Overall, participants responded positively to attending a book fair in Toronto, with only 7.41% refusing attendance. The reasons given for not attending were always in reference to limited resources (human and financial) since those publishers felt they were too small. This is something that we address as one of our features for new and small publishers. Those participants who said they would come depending on certain conditions wanted mostly to be assured that it would be a public fair (which is being recommended) and that the costs were affordable. Since close to 80% have recently participated in a book fair, they are implying that if we kept costs competitive they would attend (recommendations include establishing an affordable exhibit fee structure). A few respondents said that they would have representation at the Fair but as part of a larger group, through their sales force or a retailer. This is another point that we address in the Book Fair features.

Sample answers from the publishers' survey:

- "These answers were provided under the guise that you're offering a public consumer book fair, not an industry professional function."
- "There are enough industry fairs and PD opportunities through industry associations, but very few opportunities to interact with the public; we'd rather be able to sell books."
- "We love including authors in events, it really depends what this ends up being..."
- "Include books in languages other than English, both for the Toronto-area public and to attract international publishers, Francophone publishers, etc."
- "Further exposure and the chance to meet new customers."
- "Hope to sell books and get visibility."
- "We love every opportunity to sell books and to meet and interact with our readers."
- "We have lots of Toronto authors and illustrators."
- "Networking. To sell a few books, sure, but more to meet with readers, writers, and agents. To raise our profile and show off some of our authors."
- "With bookstores failing, this would be a great way to get to the book-loving public directly."
- "For small independent publishers based in Toronto—this would be an inexpensive alternative to book fairs outside of the Toronto area; we have many new titles we would like to get into the hands of the public since the dominating bookseller is rarely interested in our smaller list of social justice titles, stocks only a few copies per store, and returns most of their purchases within 6 mos."
- "Good opportunity to meet publishers from other countries, network, buy and sell rights, and readers, and books."
- "Canada has a diverse literary scene, a lot of which is comprised of independent publishers who cannot always attend the other international fairs. I believe by bringing international

publishers to us, these independent presses that are arguably the bread and butter of Canadian literature will progress in the direction of international rights sales that this industry needs to sustain itself.”

Key Findings from the publishers' survey

- Almost 80% have attended a book fair.
- Almost 70% have attended a book fair in the last year.
- Those who did not attend a book fair felt they were too small, too new or were represented by another group.
- Networking, connecting with educators, and librarians, selling books and exposure for their authors were some of the main perceived benefits from a book fair.
- Publishers were almost equally divided about the best time of the year for a book fair.
- Publishers were interested in access to digital publishing and multi-platform sales opportunities.
- Publishers measured a successful fair by the revenues from book sales and the number of new contacts.
- 90% would bring authors to the fair and 83% to book signing opportunities.
- 92% would want to sell books directly to the public.

Online surveys were sent to the following publishers:

Acorn Press	Canadian Plains Research Centre
Annick Press	Canadian Scholars' Press Inc.
Anvil Press	Cape Breton University Press
Aquila Communications Inc.	CCSP Press
Arbeiter Ring Publishing	Centre for Addiction and Mental Health
Arsenal Pulp Press	ChiZine Publications
Aspirations Publishing Inc.	Coach House Books
Asteroid Publishing	Cormorant Books Inc.
Athabasca University Press	Coteau Books
Banff Centre Press	Creative Book Publishing
Bayeux Arts Inc.	Demeter Press
Between the Lines	Dundurn
Bookland Press	ECW Press
Boulder Publications	emc notes inc.
Breakwater Books Ltd.	Fernwood Publishing Ltd.
Brick Books	Fireside Publishing house
Brighter Books Publishing House	Firewater Media Group
Broadview Press	Fitzhenry and Whiteside
Brush Education Inc.	Flanker Press
Bryler Publications Inc.	Focus Strategic Communications Inc.
Caitlin Press Inc.	Formac Publishing Company Ltd.
Canadian Art Museum Directors' Organization	Frederick Harris Music Co., Ltd.
Canadian Museum of Civilization	General Store Publishing House Inc.

APPENDIX 4: PUBLISHERS' SURVEY

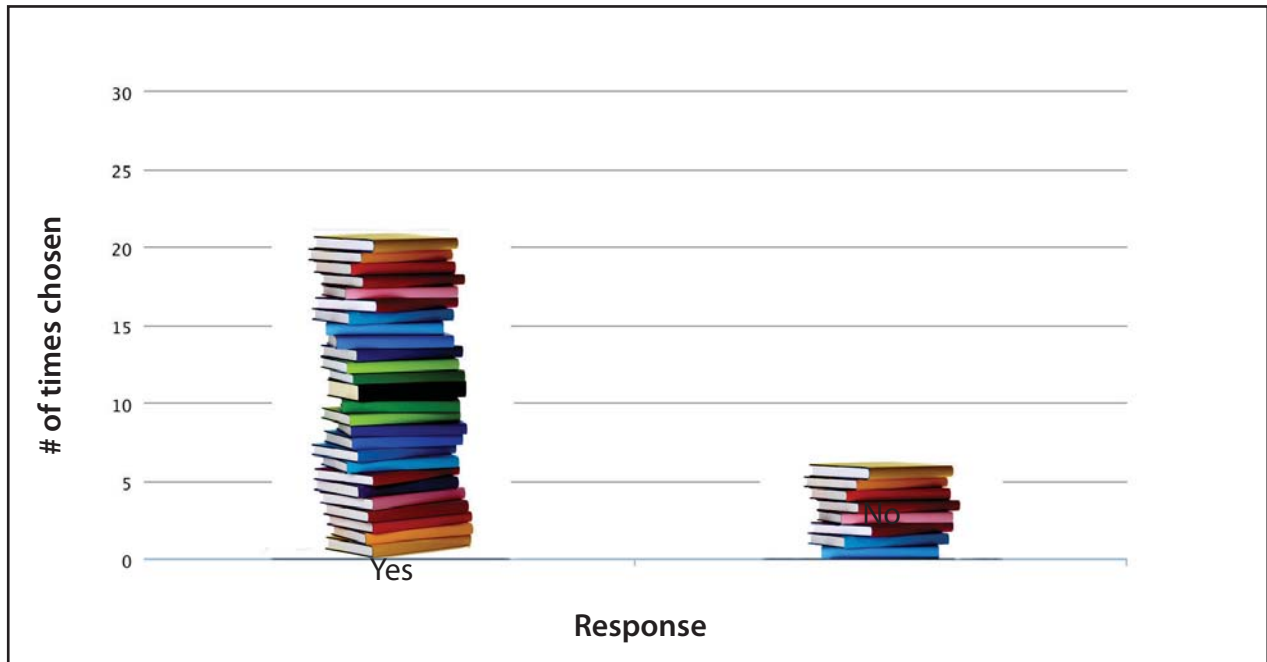
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Goose Lane Editions
Great Plains Publications
Groundwood Books
Hancock House Publishers
HarperCollins
Health & Everything Publications
House of Anansi Press
Iguana Books
Inanna Publications
Inhabit Media Inc.
Invisible Publishing
Irwin Law Inc.
J. Gordon Shillingford Publishing
James Lorimer & Company Ltd., Publishers
Kids Can Press
Knowledge Bureau
Kya Publishing
Les Éditions CEC Inc.
Linda Leith Publishing
Lone Pine Publishing
MacIntyre Purcell Publishing Inc.
Mansfield Press
McGill-Queen's University Press
McKellar & Martin Publishing Group Co.
Mother Tongue Publishing
NeWest Press
Nimbus Publishing
Now or Never Publishing
Oolichan Books
Orca Book Publishers Ltd.
Owlkids Books/Maple Tree Press
P.D. Meany Publishers
Pacific Educational Press
Pajama Press
Palimpsest Press
Patrick Crean Editions
Penguin Group Canada
Playfort Publishing
Playwrights Canada Press
Pontifical Institute of Mediaeval Studies
Porcupine's Quill
Portage & Main Press
Productive Publications
Purich Publishing Ltd.
Quattro Books
Raincoast Books
Random House
RK Publishing
Robert Rose Inc.
Rocky Mountain Books
Ronsdale Press
Royal BC Museum
Sara Jordan Publishing
Second Story Press
Self-Counsel Press
Signature Editions
Sono Nis Press
Stanton Atkins & Dosil Publishers
Talonbooks Ltd.
The Heritage Group
The Key Publishing House Inc.
The Secret Mountain
Theytus Books Ltd.
Thistledown Press Ltd.
Thompson Educational Publishing Inc.
Three O'Clock Press
TouchWood Editions
Tradewind Books Ltd.
Tralco Educational Services
Turnstone Press
Ulysses Travel Guides
United Church Publishing House
University of Alberta Press
University of British Columbia Press
University of Calgary Press
University of Manitoba Press
University of Ottawa Press
University of Toronto Press Inc.
Webcom Inc.
WestView Learning
Whitecap Books Ltd.
Wilfrid Laurier University Press
Your Scrivener Press

Survey Questions and Results

1. Have you ever attended a Book Fair?

Yes (77.8%)

No (22.2%)

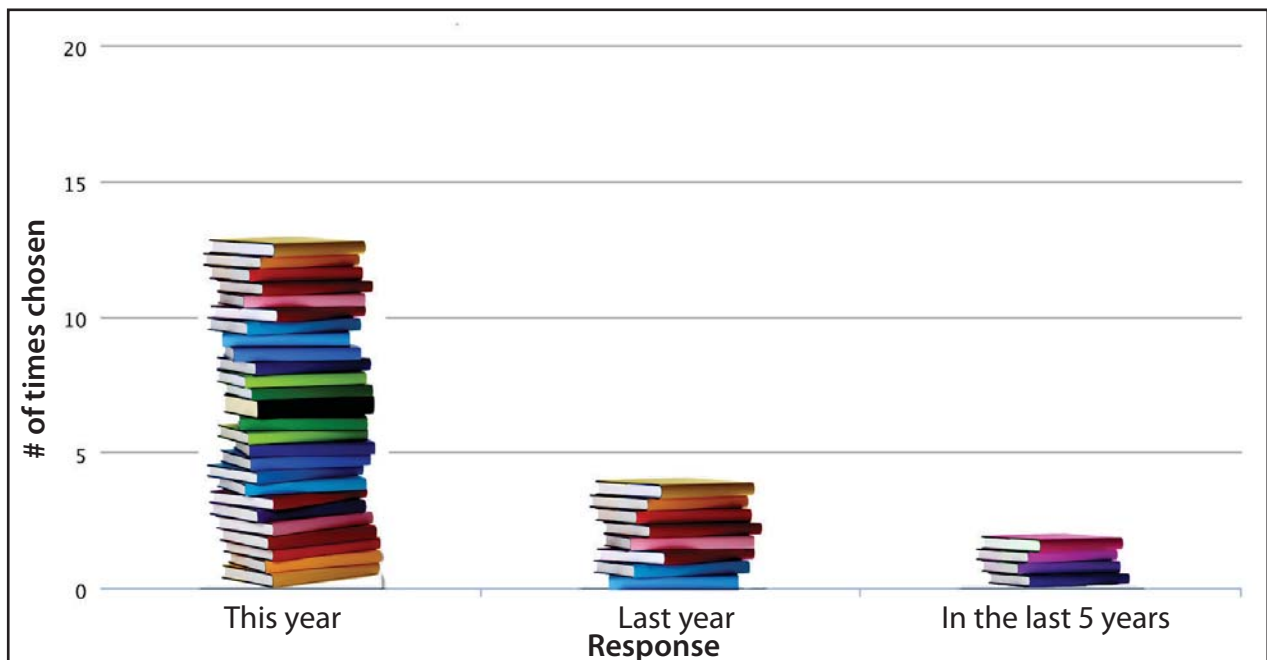


2. If "yes", when was your most recent participation in a Book Fair?

This year (68.4%)

Last year (21.1%)

In the last 5 years (10.5%)



3. If “yes”, which one(s) and why that one (those)?

- “Word On The Street”
- “London, New York, Frankfurt, Japan”
- “New York is the largest and most known”
- “Word On The Street, AWP, London, etc”
- “Frankfurt, London, BEA, etc”
- “ALA Midwinter, to reach out to librarians”
- “ALA mid-winter meeting, great for getting into the US library market”
- “The last one I participated in was BookExpo Canada, the last year it was held”
- “AWP in Boston – Association of Writers and Writing Programs – I go every year. It’s in a different city in the US every year.”
- “AWP, Congress ... We’ve been trying to increase academic sales thus Congress. We tried AWP for the first time this year with the goal to sell to the public in the US.”
- “Salon du livre de Montreal – an annual event for us.”
- “Word On The Street”
- “Word On The Street”
- “Word On The Street (Halifax)”
- “Ontario Library Association (speaks to our library audiences) / Word On The Street (speaks to our trade audiences) / Leftwords Festival of Books and Ideas (speaks to our academic/social justice audiences) / Congress of the Social Science and Humanities (speaks to our academic audiences)”
- “ALA”
- “ALA, Congress, BEA”
- “Salon du livre de Montreal – a local book fair.”
- “Paris Cookbook Fair. Will attend London Book and BookExpo America over the next eight weeks.”
- “Frankfurt Book Fair; Salon du Livre, Paris; Bologna Children’s Book Fair”

4. If “no”, why not?

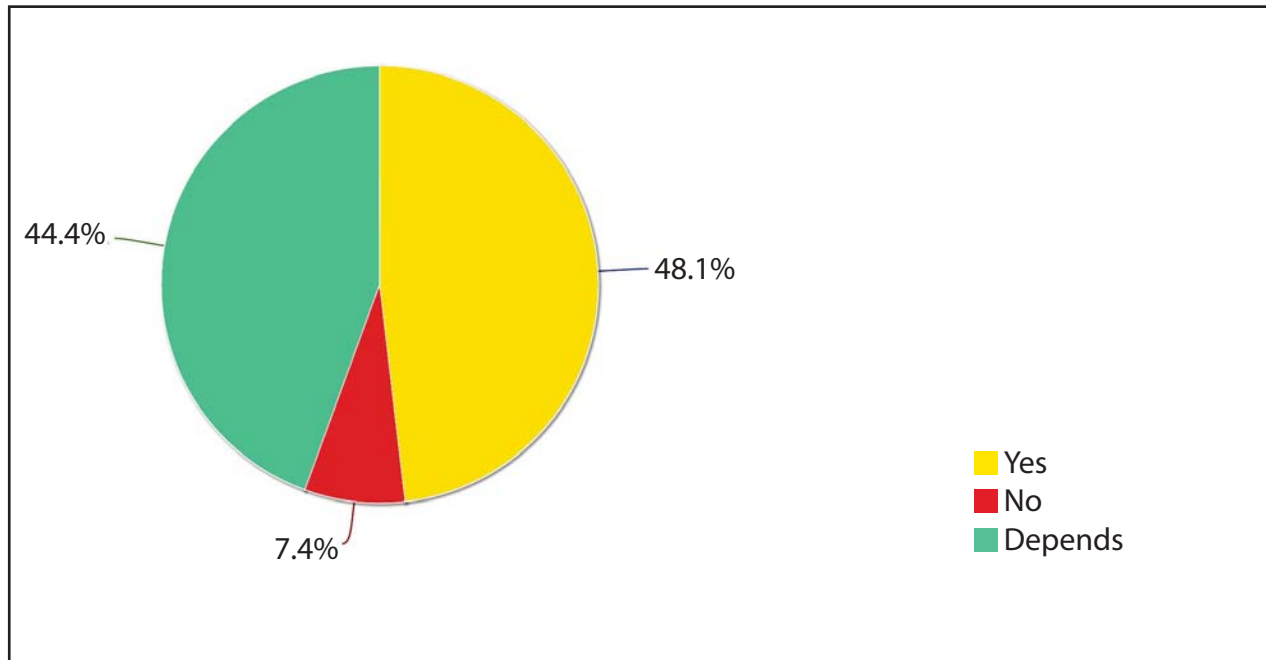
- “We’re new, and we mostly sell ebooks.”
- “We’ve been represented by our sales force (both academic and trade), but do not have the resources to send staff to most events.”
- “Have been a publisher only 2 years.”

5. Would you attend a Book Fair in Toronto?

Yes (48.1%)

No (7.4%)

Depends (44.4%)



6. If "yes", why?

- "Further exposure and chance to meet new customers."
- "Hope to sell books and get visibility."
- "We love every opportunity to sell books and to meet and interact with our readers."
- "We have lots of Toronto authors and illustrators."
- "Networking. To sell a few books, sure, but more to meet with readers, writers, and agents. To raise our profile and show off some of our authors."
- "With book stores failing, this would be a great way to get to the book-loving public directly."
- "For small independent publishers based in Toronto –this would be an inexpensive alternative to book fairs outside of the Toronto area, we have many new titles we would like to get into the hands of the public since the dominating bookseller is rarely interested in our smaller list of social justice titles, stocks only a few copies per store, and returns most of their purchases within 6 mos."
- "Good opportunity to meet publishers from other countries, network, buy and sell rights, and readers, and books."
- "Canada has a diverse literary scene, a lot of which is comprised of independent publishers who cannot always attend the other international fairs. I believe by bringing international publishers to us, these independent presses that are arguably the bread and butter of Canadian literature will progress in the direction of international rights sales that this industry needs to sustain itself."

7. If “no”, why not?

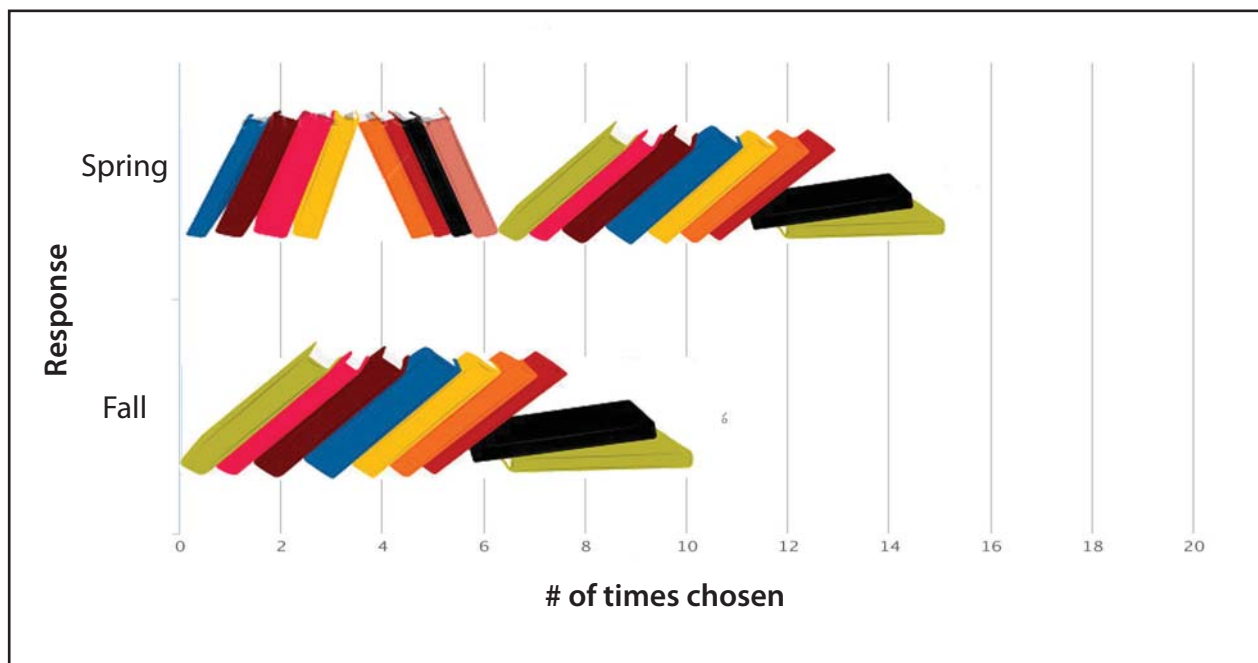
- “We might be represented by our sales force in Toronto, but we wouldn’t have the resources to travel to Toronto to attend ourselves.”
- “We don’t live in Toronto and travel expenses are great.”

8. If “depends”, please state factors.

- “As a publisher we would prefer to partner with a retailer as opposed to selling directly to the consumer.”
- “What are the goals? How does it enhance/augment/is different from what our company is already investing time and money in (substantially)? / How does it highlight authors and the community? / How will the fair improve our relationship with booksellers, authors, other publishers, etc?”
- “Total cost for getting their and attending. / How many exhibits/attendees are expected.”
- “Timing, cost, features.”
- “It depends on the time of year and the table fee. We are a poetry press and find the table fee for Word On The Street quite expensive – although we do pay it.”
- “Cost. We’d also like to be a part of the programme somehow – having one of our authors invited etc.”
- “Time of year and costs.”
- “Booth/table fees. / Timing. / Publicity for the event.”
- “I would hope that our sales rep at PGC would attend and take our books.”
- “If it is a public fair probably not because we don’t have enough staff to support a public event.”

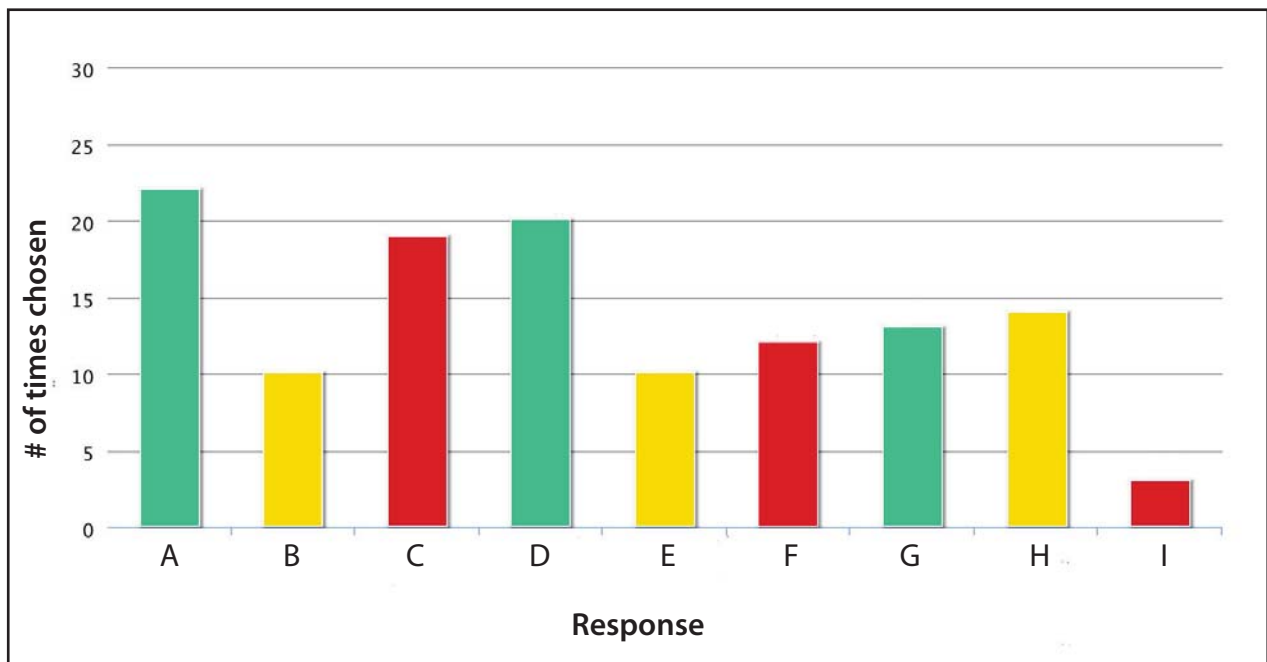
9. What time of year would you prefer to see a Book Fair in Toronto?

Spring (60%)
 Fall (40%)



**10. What are some “must have” features that you would like to see in a Toronto Book Fair?
Please indicate your top 5 (five).**

- A) Book sales (17.9%)
- B) Access to digital publishing and multi-platform sales opportunities (8.1%)
- C) Connecting with educators (15.4%)
- D) Connecting with librarians (16.3%)
- E) Professional development workshops (8.1%)
- F) Book launches (9.8%)
- G) Networking opportunities through formal sessions (10.6%)
- H) Networking opportunities through informal sessions (11.4%)
- I) Other (2.4%)

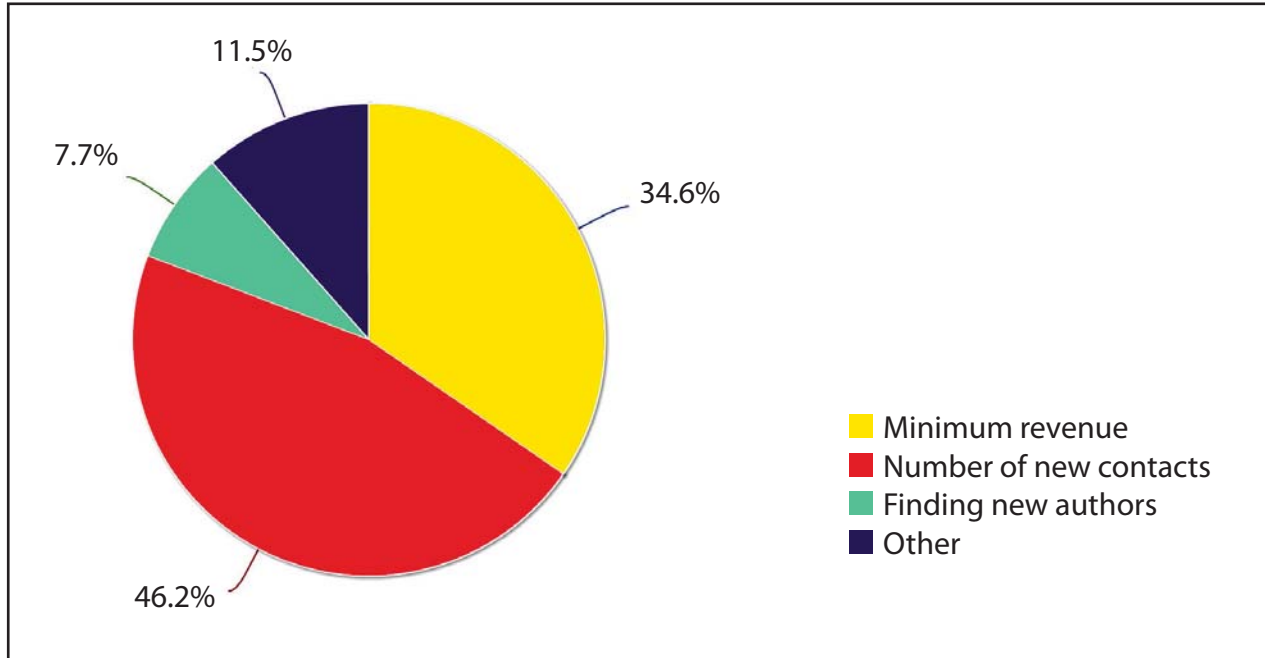


11. If “Other”, in question 10, please note the feature:

- “Great promotion of the fair to the public.”
- “Inter-cultural activities.”

12. What criteria do you use to measure the success of your participation in a Book Fair?

- Minimum revenue (34.6%)
- Number of new contacts (46.2%)
- Finding new authors (7.7%)
- Other (11.5%)



13. If "Other" in question 12, please state the criteria.

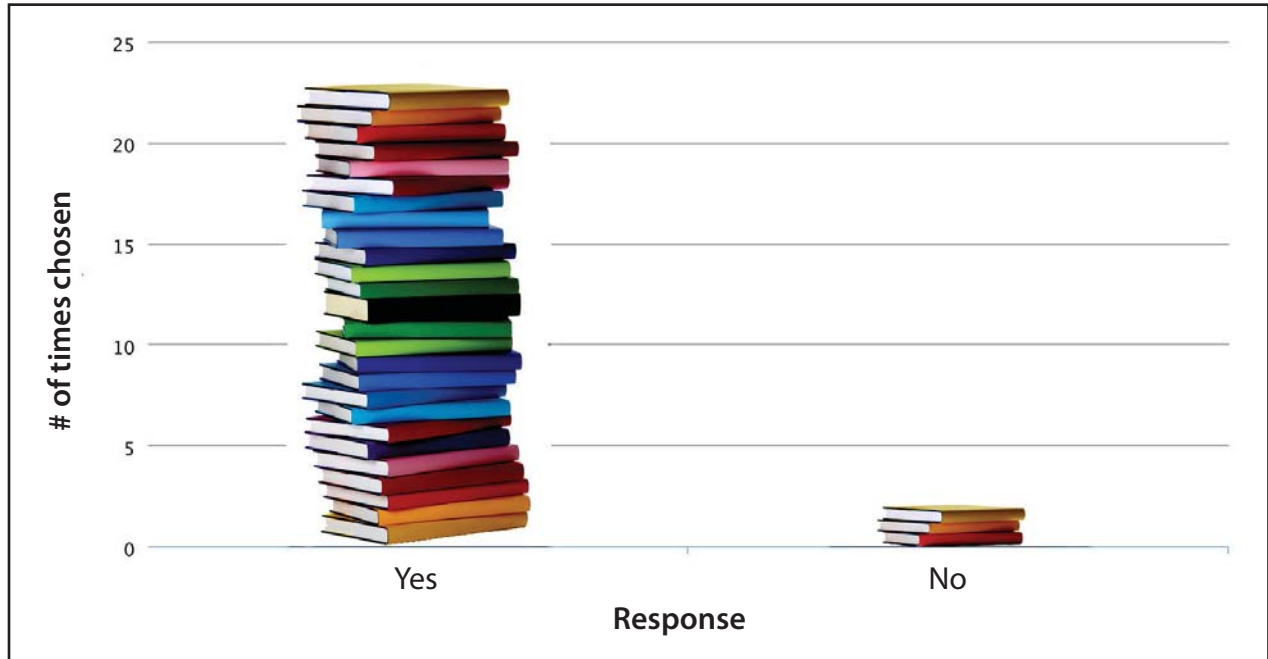
- "Multiple criteria including revenue and contacts primarily."
- "Overall impression of costs vs. benefits."
- "New contacts with all sorts of people and institutions."
- "Creating awareness and an opportunity for book publishers to come together within the professional community."

APPENDIX 4: PUBLISHERS' SURVEY

14. Would you bring your authors for a book launch?

Yes (92%)

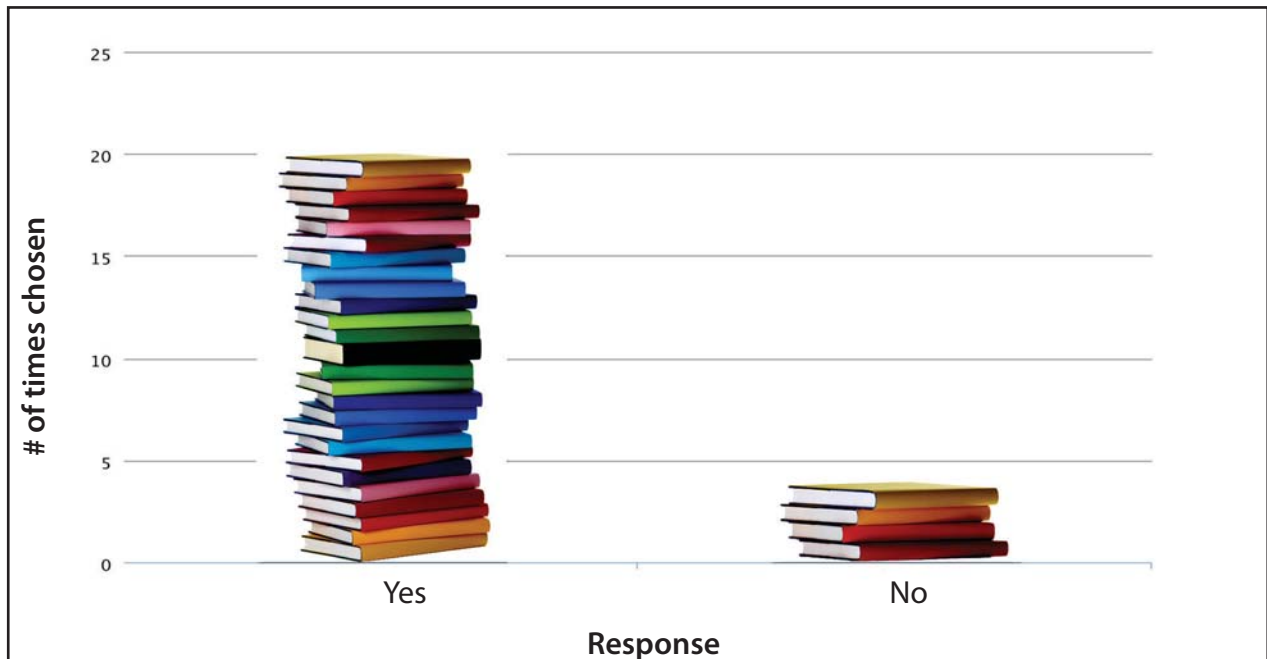
No (8%)



15. Would you bring your authors for a book signing?

Yes (83.3%)

No (16.7%)

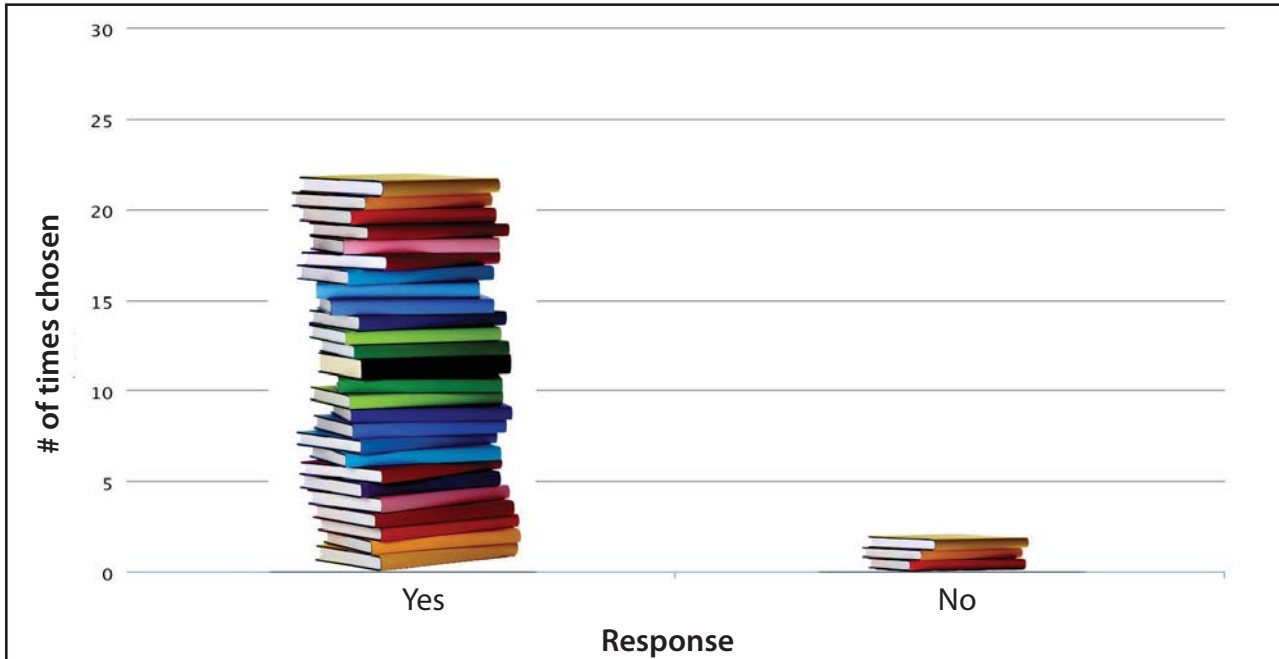


APPENDIX 4: PUBLISHERS' SURVEY

16. Would you want to sell books directly to the public?

Yes (91.7%)

No (8.3%)

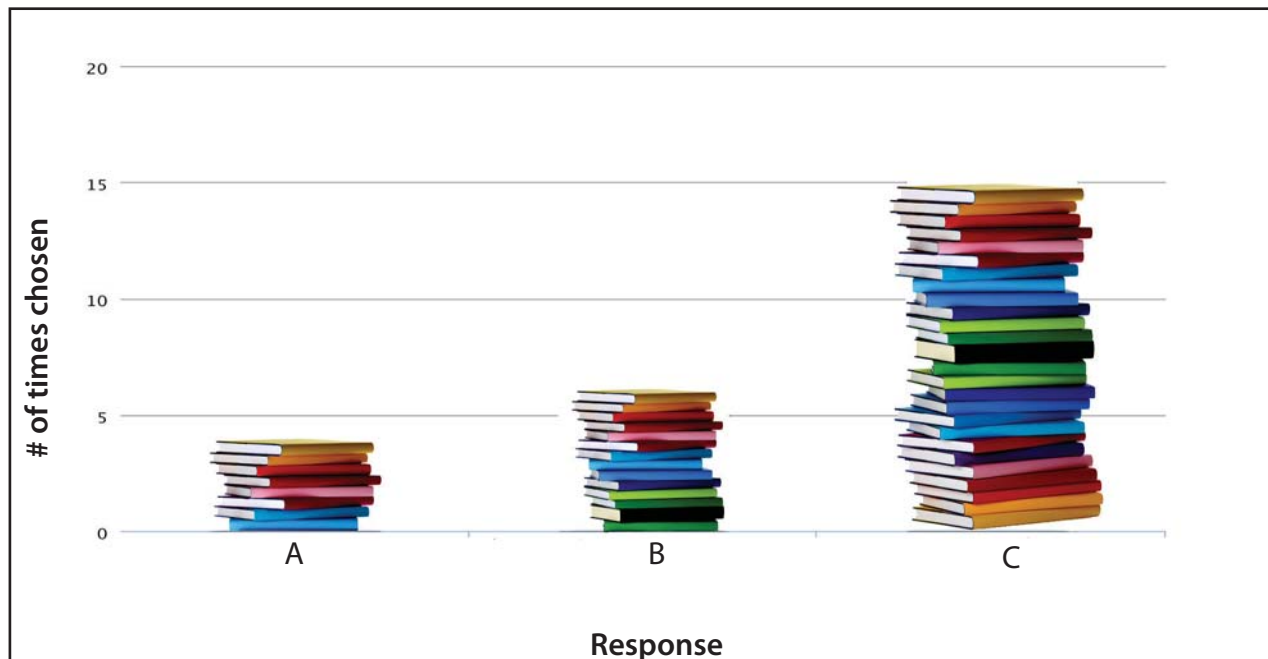


17. Would you like to participate in a fair that is predominantly:

A) An industry fair, with professional panels and workshops (16%)

B) A public fair with readings, signings and launches (24%)

C) A combination of the two (60%)



18. What questions or comments would you have for the organizers of a Toronto Book Fair?

- "These answers were provided under the guise that you're offering a public consumer book fair, not an industry professional function."
- "There are enough industry fairs and PD opportunities through industry associations, but very few opportunities to interact with the public, we'd rather be able to sell books."
- "We love including authors in events, it really depends what this ends up being. How is it going to be different from WOTS, or IFOA? Our resources are pulled in so many directions, the decision to spend money on something else is going to be closely tied to the overall purpose."
- "How will it incorporate ebook sales, distribution, etc, into the proceedings?"
- "Why are spring/fall the only options for this? If in the fall it would be hot on the heels of WOTS (may divide our audience) OR if in the spring it could conflict with Congress of the Social Sciences and Humanities. / Would these other important industry events be taken into account when planning the date/session? / Where would the location of the book fair be to ensure traffic is maximized? / What would the cost be for publishers?"
- "Include books in language other than English, both for the Toronto-area public and to attract international publishers, Francophone publishers, etc."

Literary Organizations and Book Publishing Professionals

SUSAN CARSON, Toronto Public Library
FRANÇOIS CHARETTE, Executive Director, Livres Canada Books
ANNE COLLINS, Vice-President, Random House of Canada
JOHN DEGEN, Executive Director, The Writers' Union of Canada
SAMANTHA FRANCIS, Digital Marketing and Publishing Specialist, BookNet Canada
GREG GATENBY, Author; Founding Artistic Director, Harbourfront International Festival of Authors and Reading Series
NOAH GENNER, CEO and President, BookNet Canada
VALERIE HUSSEY, Founder, Kids Can Press; Principal, Valerie Hussey Consulting
HOLLY KENT, Sales and Marketing Manager, The Canadian Children's Book Centre
CAREY LOW, Sales representative, Canadian Manda Group
JEFFREY MILLER, President, Organization of Book Publishers of Ontario
ANNE-SOLANGE NOBLE, Directrice des Droits étranger, Gallimard
TINA SREBOTNJAK, Toronto Public Library
IRIS TUPHOLME, VP, Publisher & Editor-in-Chief, HarperCollins Canada
JODI WHITE, Senior Manager, Canadian Booksellers Association
CAROLYN WOOD, Executive Director, Association of Canadian Publishers

Canadian Book Festivals and Fairs

FRANCINE BOIS, Directrice Générale, Salon du livre de Montréal
NICOLA DUFFICY, Director of Events, Moorshead and Associates; National Director, Word On The Street
CYNTHIA GOOD, Book Summit (see also Educational below)
LINDA LEITH, President, Linda Leith Publishing Inc., Founder Blue Metropolis Literary Festival
PATRICK MCGAHERN, President, Antiquarian Book Fair
ALEXANDRA MOORSHEAD, Moorshead and Associates and former Festival Director/Executive Director, Word On The Street
RICHARD PRIEUR, Directeur Général, ANEL
PAUL SAVOIE, Directeur Général, Salon du livre de Toronto
KARINE ST.GERMAIN, Book fairs Coordinator, ANEL
GEOFFREY TAYLOR, Director, Authors at Harbourfront Centre
MEREDITH TOUTCHING, Program Coordinator, Forest of Reading/Festival of Trees

Other Cultural Organizations & Representatives

VIRESH FERNANDO, President, Toronto Consulting Group
DALTON HIGGINS, Journalist, Broadcaster, Author (digital culture, hip hop and popular culture)
SHAUNA LEVY, President, The Design Exchange; Co-founder, The Interior Design Show
STEVEN LEVY, Founder and Producer of many local and international consumer trade shows such as One-of-a-Kind, Toronto Art Show, etc.
JANICE PRICE, CEO, Luminato
MICHAEL REDHILL, Author and Luminato Literary Program Director

APPENDIX 5: CONSULTATION LIST

MARK SARNER, Manifest Communications, Inc.

HELEN WALSH, President, Diaspora Dialogues and Publisher, Literary Review of Canada and Director, Spur Festival

Educational Professionals

STACEY CORAY, Senior Manager, Partnership Development, TCDSB

CYNTHIA GOOD, Director, Creative Book Publishing Program, Humber College

LORNE KULAK, Instructional Leader, TDSB

ANTANAS SILEIKA, Director, Humber School for Writers

JANET STICKNEY, Community Partnerships, TDSB

PHILIP VETTESE, Curriculum Leader, TDSB

Federal Government

DORIS BOIVIN, Manager, Support for Organizations, Canada Book Fund / Book Publishing Policy and Programs, Department of Canadian Heritage

ARASH MOHTASHAMI-MAALI, Head / Chef, Writing and Publishing Section/Service des lettres et de l'édition, Canada Council for the Arts

MARIE MOLINER, Regional Executive Director, Ontario Region, Department of Canadian Heritage

CATHERINE MONTGOMERY, Program Officer /Agente de programme, Writing and Publishing / Service des lettres et de l'édition, Canada Council for the Arts

MICHAEL STEWART, Senior Economic Officer, Ontario International Marketing Centre, United Kingdom, High Commission of Canada

Provincial Government

JENNIFER BROWN, Research Consultant, Ontario Media Development Corporation

KEVIN FINNERTY, Assistant Deputy Minister, Ontario Ministry of Tourism, Culture and Sport

JANET HAWKINS, Consultant, Industry Initiatives (Books), Ontario Media Development Corporation

RONALD HOLGERSON, President & CEO, Ontario Tourism Marketing Partnership Corporation

CHRISTINE INNES, Chief of Staff, Minister of Culture Michael Chan

CLAUDETTE JAIKO, Franco-Ontarian Arts Officer, OAC

KRISTINE MURPHY, Director of Industry Development, Ontario Media Development Corporation

DONNA RATCHFORD, Director, Culture Strategic Policy Branch, Tourism, Culture and Sport

MICHAEL SCHELLENBERG, Literature Officer, OAC

KATHLEEN SHARPE, Executive Director, Ontario Cultural Attractions Fund

Municipal Government

CLAIRE HOPKINSON, Executive Director and CEO, Toronto Arts Council/Toronto Arts Foundation

RANDY MCLEAN, Acting Director of Strategic Growth and Sector Development and Acting Film Commissioner, Economic Development, City of Toronto

TERRY NICHOLSON, Acting Director of Culture, City of Toronto

JOEL PETERS, Chief Marketing Officer, Tourism Toronto

BETH REYNOLDS, Director of Grants, Toronto Arts Council

International Consulates

GERMÁN DOMÍNGUEZ, The Consul Minister, Deputy Consulate General of Argentina in Toronto
ADRIANA FRIENNA, Director, Italian Cultural Institute

International Book Fairs

BRIGITTE BOUCHARD, former publisher of les Allusifs, publisher of Notabilia, imprint of Noir sur Blanc, part of Libella Publishing Group, Belgium.

JUAN-CARLOS FERNANDEZ, Salon du Livre de Paris

VERÓNICA MENDOZA, Coordinator of exhibitors and professionals, Feria Internacional del Libro de Guadalajara

THOMAS MINKUS, VP, Emerging Media & English Language Markets, Frankfurt Book Fair

DAVID UNGAR, Feria Internacional del Libro de Guadalajara

APPENDIX 6: CALENDAR OF LITERARY EVENTS

January

Jan. 23–Feb. 5: Cairo International Book Fair

February

Jan. 23–Feb. 5: Cairo International Book Fair

Feb. 21–22: Reading for the Love of It

Feb. 23–24: Galiano Literary Festival

Feb. 24–Mar. 2: Freedom to Read Week

March

Feb. 24–Mar. 2: Freedom to Read Week

Mar. 28–Apr. 1: Mile End Poets' Festival

April

Mar. 28–Apr. 1: Mile End Poets' Festival

Apr. 3–7: gritLit

Apr. 10–30: Ottawa International Writers Festival

Apr. 10–14: Salon international du livre de Québec

Apr. 12: LIT FEST New West

Apr. 12–13: Prince Edward County Authors Festival

Apr. 15–17: London International Book Fair

Apr. 19–20: North Shore Writers Festival

Apr. 21–28: Edmonton Poetry Festival

Apr. 22–28: The Frye Festival

Apr. 22–28: Blue Metropolis Literary Festival

Apr. 25–May 13: Buenos Aires International Book Fair

May

Apr. 25–May 13: Buenos Aires International Book Fair

May 3: BookFest

May 5, 7, 9: Forest of Reading (throughout Ontario)

May 9: Hackmatack Awards

May 11–12: Toronto Comic Arts Festival

May 6–11: Nigerian International Book Fair

May 15–16: Forest of Reading Festival of Trees

May 16–19: Prague International Book Fair

May 16–20: Turin International Book Fair

May 25: The Elora Writers' Festival

May 29–June 1: BookExpo America

June

May 29–June 1: BookExpo America

June 5: Learner's Conference

June 14–23: Luminato (contains literary portion)

June 19: Book Summit

June 20–23: Whitehorse Poetry Festival

June 22–23: Latitudes Storytelling Festival

July

July 3–6: Tokyo International Book Fair

July 11–14: Elephant Mountain Literary Festival

July 12–14: Lakefield Literary Festival

July 16–19: Leacock Summer Festival

July 19: Read by the Sea

July 19–22: Saskatchewan Festival of Words

August

Aug. 10–26: Edinburgh International Book Fair

Aug. 14–18: Writers at Woody Point

Aug. 15–18: Sunshine Coast Festival of the Written Arts

Aug. 22–25: FanExpo Canada

Aug. 28–Sept. 1: Beijing International Book Fair

September

Aug. 28–Sept. 1: Beijing International Book Fair

Sept. 14: Telling Tales

Sept. 14–17: Eden Mills Writers' Festival

Sept. 21–29: THIN AIR Winnipeg International Writers Festival

Sept. 22: Word On The Street

October

Oct. 9–13: Frankfurt International Book Fair

Oct. 12–14: Toronto Antiquarian Book Fair

Oct. 14–20: WordFest

Oct. 16–Nov. 2: International Festival of Authors

Oct. 18–Nov. 11: Festival of Oral Literature

Oct. 22–27: The Vancouver Writers Fest

Oct. 25–27: BookFest Windsor

APPENDIX 6: CALENDAR OF LITERARY EVENTS

November

Oct. 16–Nov. 2: International Festival of Authors

Oct. 18–Nov. 11: Festival of Oral Literature

Nov. 15–18: Ottawa Storytelling Festival

Nov. 17–18: Expozine

Nov. 20–25: Salon du livre de Montréal

Nov. 24–29: JCC Jewish Book Festival

Nov. 30–Dec. 1: Guadalajara International Book Fair

December

Nov. 30–Dec. 1: Guadalajara International Book Fair

Dec. 5–8: Salon du livre de Toronto

Dec. 8: Small Press Book Fair

Note: Some of these event dates are from previous years as they have not all been confirmed at the time of this report.

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- Trends in eBook Export Markets, Marketplaces, and Digital Publishing Environment (AECB, 2009)
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APPENDIX 7: REFERENCE MATERIALS

- Who Buys Books in Canada? (Hill Strategies, 2005)
- Who Buys Books and Magazines in Canada? (Hill Strategies, 2011)

Articles

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"Canadian Book Sales in Q4 2012," BookNet Canada, March 11, 2013, accessed March 28, 2013, <http://www.booknetcanada.ca/>.

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