

of publishing a text proposed or written at his request. The following stage includes the publicity work required to make the book known, as well as the distribution operations to get the book to the sales point or to the consumer in cases or direct sales. At the end of the process the book reaches the public in one of three ways: through sales point, particularly book stores . . .

. . . but certain types of books can be found in smoke shops, department stores, drug stores, and so on.

. . . or in libraries, or through the mail and book clubs.

Until the 1960s the Quebec publishing industry was concentrated in major teaching or near-teaching institutions where some of the major collections are the very foundation of our culture.

Also, up until then, the major distribution networks, especially those dealing with general literature, belonged to foreign interests.

During the sixties and the seventies, Quebec companies publishing both specialized and non-specialized works, grew in number. Soon, every niche of our market would be represented by national products published by Quebec firms. That was true for works of fiction as well as non-fiction. Many creative people could better reach their public just as the first generations of publishers were becoming more professional and anxious to increase their share of the market, so far dominated by French publishing companies, not to mention the competition on this small market coming from English publishers, both Canadian and American.

That is something people often find amazing when Canadian publishing is discussed abroad. No market is as much sought after as the Quebec market for the simple reason that, being bilingual, most Quebec readers have readily access to two large cultures, the French and the English. That means that they have direct access to the American production, which is enormous, largely through pocket book format, as well as to English literature from Great Britain, Australia and, of course, English Canada. Furthermore, we are also faced with strong competition, in our own language, from the French industry, one of the largest in the world, not to mention, to a lesser degree, but nevertheless a significant one, the competition coming from Belgium, Swiss and even Monaco in specific areas.

Today, only 33 per cent of French general fiction books on the Quebec market are produced by Quebec publishers.

Only 33 per cent! Imagine what it was like in the 60s!

"In the Seventies and Eighties, another battle started: the take-over and consolidation of distribution networks. Although the situation is still far from ideal, an increase in national distribution agencies and take-overs of major foreign agencies have brought about profound changes in the Quebec publishing sector.

But what about our marketing infrastructure? If we consider traditional distribution networks, European

French-language imports have long benefited, as we said before, from the fact that distribution networks in Quebec were a monopoly of major French publishing groups. This was a real obstacle for Quebec publishers, most of whom had to use the distribution networks of their French competitors. Take-overs of foreign distribution agencies and the creation of new Quebec agencies have been a first step towards genuine control over our own market.

At the next marketing level, we find bookstores and a network of small sales outlets.

And, as I said earlier, sometimes some of the major newstands, smoke shops or drugstores.

After the 1972 order in council, the number of bookstores in Quebec increased significantly, not only in the big cities but also in the regions . . .

This is of course a provincial order in council. It would take too long to explain, but it was a measure to help bookstores become more or less viable.

Nowadays, there are between 300 and 350 bookstores in Quebec, and the five chains own close to 50 more.

That is over 400 all in all.

More than 80 per cent of certified bookstores are independant concerns. But all bookstores do not derive the majority of their intake from the sale of books; several of them also sell stationary.

That helps them survive.

There is also a network of sales outlets other than bookstores like drugstores, smoke shops, convenience stores and department stores. In these 2,000 to 6,000 stores, they mostly push pocket books and practical books.

You will not find any great literature in this kind of store but only at the 350 or 400 professional booksellers.

This network is needed for comprehensive coverage of the market, but its operation is costly and its potential is but partially developed by many publishers in Quebec

As to the printers, very few of them print only books. And the network of libraries is unfortunately very poor in Quebec.

I think that the GST will deal a fatal blow to the book industry.

The economic significance of all the players in this industry should not be overlooked. Income generated by those businesses contribute an important capital to the economy. Registered libraries contribute some \$125 million and publishers \$75 million. Although no figures are available on distributors, it can be assumed that their income totals at least \$100 million.

Thus, income in the book industry as a whole can be estimated at more that \$300 million annually. This is a very conservative estimate because the income of non professional booksellers and of foreign publishers in Quebec is not included.