



CYNGOR LLYFRAU CYMRU
WELSH BOOKS COUNCIL

A Review of English-language Magazines in Wales

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Document 1: A Review of English-language Magazines in Wales
(by Tony Bianchi, Tim Holmes and Alex Clark)

Document 2: Response of the Welsh Books Council to the Review
(by the Publishing Grants Department, Welsh Books Council)

Document 3: Market Research of Readers of English-language Magazines
Published in Wales (by Wavehill)

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A Review of English-language Magazines in Wales

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Summary

This review, commissioned by the Welsh Books Council, looks at the position of publicly subsidised English-language magazines in Wales and the way they are promoted and funded. It considers the purposes of funding and the part played by magazines in sustaining a healthy, diverse public sphere. Market research informs an assessment of how far the sector offers value-for-money and how well it serves readers, writers and the publishing industry. It pays particular attention to the threats and opportunities presented by the shift from print to digital. The review concludes that the sector has entered a period of stagnation, with declining readerships, unsustainable funding levels, and significant (although by no means universal) dissatisfaction with some aspects of content and range of material available. Measures are recommended to reduce funding dependency, introduce innovation and promote greater diversity and reach.

Background

History and current situation

Between 1967 and 2003 responsibility for the funding of English-language magazines in Wales rested with the Arts Council of Wales as part of that organisation's provision for literature. Initially, grants were awarded on a year-by-year basis; in 1988, however, an open, competitive three-year franchise system was established. In 2003 this funding responsibility was transferred to the Welsh Books Council (WBC): the terms of the transfer required it to retain both the literary/cultural criteria applied by its predecessor and its appraisal and franchise procedures. The major recipients of grant-aid throughout this period have been *Poetry Wales*, *Planet*, *The Anglo-Welsh Review* and its successor, the *New Welsh Review*. In addition, smaller grants have been made to a number of little magazines and supplements. A list of current recipients is given in Appendix 1.

Why review now?

Although individual titles are assessed every three years, the magazine sector as a whole and the role of its primary funders have not been scrutinised since Rhodri Williams's review, commissioned by the Arts Council of Wales in 1987. His report, which covered Welsh-language as well as English-language titles, led to the setting up of the current franchise system, the introduction of clearer assessment criteria and the professionalisation of the magazines' own marketing and management. Long-term gains ensued and the present Review Panel is conscious that these must not be jeopardised. Twenty-five years later, however, there are once more pressing reasons for undertaking a critical overview of the sector:

- **The need to achieve best value for money.** A steep decline in sales and other revenue in the last six years has raised grant-dependency to an unsustainable level.
- **The need for renewal.** The latest three-year appraisal (November 2011), although in many respects positive, reported a degree of inertia amongst long-term recipients of

funding. As in 1987, we need to ask how Wales's magazine sector can best be rejuvenated in order to engage new readers.

- **The need to reconsider eligibility criteria.** A cautious application of the literary/cultural criteria inherited from the Arts Council of Wales has restricted the WBC's freedom to consider new initiatives. Should these criteria be interpreted more broadly? Can this be done at current funding levels without raising false expectations?
- **The media crisis.** The challenges facing magazines cannot be separated from the situation of the media generally, in particular the decline of print journalism and the rise of digital and multi-platform options. This situation has serious implications for the public sphere in Wales and the need to investigate strategies of common interest is more acute than ever.

Scope and aims of the Review: key questions

The aim of the Review was to consider how the sector as a whole can best be developed: it did not assess individual publications or proposals, except in so far as they illustrated general trends or possibilities. (Each of the funded titles was individually appraised by the Welsh Books Council in 2011 and specific targets set for the current period.)

With the above concerns in mind, the following questions were prioritised:

- 1 **Why should (some) magazines be funded?**
- 2 **Do the magazines provide good value for money?**
- 3 **Do the magazines provide reader satisfaction?**
- 4 **Do the magazines provide effective outlets for Welsh writers?**
- 5 **Do the magazines support the Welsh publishing industry as a whole?**
- 6 **How can the funding system promote innovation?**
- 7 **How should magazines and the funding system respond to the digital revolution?**

Panel members

The members of the Review Panel were:

- Tony Bianchi: writer, former Literature Director at the Arts Council of Wales
- Alex Clark: publisher, writer, former editor of *Granta* magazine
- Tim Holmes: Senior Lecturer at Cardiff University's School of Journalism, Media and Cultural Studies; co-author of *Magazine Journalism* (Sage 2012), etc.

Process

The Review Panel investigated the above questions through:

- considering all reports, submissions and performance indicators compiled for the 2006/09, 2009/12 and 2012/15 tenders, and 2012 annual reports for each franchised title;
- meetings, telephone interviews, questionnaire responses and other written submissions, involving a range of stakeholders, particularly writers, publishers, magazine editors and funding bodies outside Wales (74 in total and referred to in

this report as the **Review Panel consultation**). These are composited in Appendix 2. Responses from booksellers and from Wales-based arts and social organisations were too few to provide a balanced view of these sectors;

- analysing market research into the reading habits and preferences of readers of English-language magazines in Wales, carried out by **Wavehill**.

Key Questions

Q 1 Why should (some) magazines be funded?

The justification for funding literary and cultural magazines derives ultimately from the Keynesian principles that informed the establishment of the Arts Council of Great Britain over sixty years ago, viz. that the market, left to its own devices, cannot provide a healthy range of creative activity of high quality accessible to the general public and must be supplemented by public investment. It is the same argument that is used today to defend the funding of a very wide range of artistic activities in Wales, from the National Theatre and National Youth Orchestra to the Night Out scheme, which helps local volunteer promoters stage professional performances in community venues. There is a broad consensus across the political spectrum that support for cultural endeavour of this kind is appropriate, both in its own right and because it contributes to well-being, social cohesion and economic growth. It is a consensus shared across a wide range of countries where English is a primary language: the USA, Canada, Australia, New Zealand, England, Scotland, Ireland and Northern Ireland all have well-established grant systems for the support of magazines dedicated to new writing, the arts, culture and ideas, and the promotion of a plurality of voices.

According to questionnaire respondents, English-language magazines in Wales are valued in particular because:

- they allow Wales to develop its own distinctive voices
- they promote dialogue between diverse viewpoints
- they offer a platform for the best of Welsh writing
- they help new writers develop their talents and careers
- they present Wales to the wider world and help us engage critically and creatively with that world.

Several respondents also drew attention to the importance of the public sphere for ensuring mature debate and public engagement in a devolved Wales and were keen that magazines be considered side-by-side with other media in this regard. They pointed to the lack of a broad-sheet newspaper tradition here and the fragility of the commercial print media in general. International practice again shows a consensus in this respect. Magazines in Canada, Australia, Scotland, Ireland, Northern Ireland and Wales are all funded in order to maintain a diversity of voices and opinion in the context of the media dominance of England and the USA. In Canada, as many as 115 arts and literature periodicals are supported. In addition, hundreds of other titles (leisure, sport, fashion, etc.)

receive public subsidy in order to sustain a healthy native publishing industry in the face of competition from USA. In some respects (size of economy, size of home market, historical weakness of press and media infrastructure) Wales is amongst the least advantaged of these countries in terms of its ability to compete with the commercial mainstream.

A graphic illustration of the fragility of the magazine sector in Wales can be found in the contrast with Scotland, where 195 companies publish more than 700 commercial titles, contributing around £157 million to the Scottish economy. The largest 26 of these companies constitute the Scottish branch of the Professional Publishers Association (formerly the Periodical Publishers Association). There is no branch of this organisation in Wales; nor does Wales have a single full member of the UK PPA.

Newspapers are in an equally critical situation. The circulation of Wales's only national title, the *Western Mail*, has declined by around 75% in 30 years and it has been estimated that only 10% of the population read a paper that regularly contains Welsh news (<http://www.bbc.co.uk/news/uk-wales-11111396>) The Welsh Assembly's Presiding Officer, Rosemary Butler, has referred to this 'democratic deficit' as 'one of the gravest problems facing devolution'. (<http://www.bbc.co.uk/news/uk-wales-199044380>)

In May 2012 the Welsh Assembly's Task and Finish Group on the Future of the Media concluded that 'a vibrant print media is vital for Wales, particularly in terms of ensuring democratic accountability' and recommended setting up an independent forum which would 'consider sustainable models for the print industry, and . . . include the issue of public subsidy, as happens in other small European countries.' The Welsh Government subsequently judged that this was 'a matter for the media industry' and agreed only 'that these issues should be kept under review'. Much of what follows, however, confirms the view of Leighton Andrews, Minister for Education and Skills, that 'in Wales we have a fractured and fragmented public sphere, in which a minority of our citizens engage'. (<http://www.clickonwales.org/2012/05/education-and-the-welsh-public-sphere>) It asserts the importance of a vibrant and challenging magazine culture to the health of that sphere.

Q2 Do the magazines provide good value for money?

Value-for-money judgements concerning any subsidised activity must balance the quality, reach and public benefit of that activity against its cost. There is no absolute formula for establishing whether that balance is struck in any given case: this calculation is best made on the basis of comparisons with like activity elsewhere, and the responses of intended beneficiaries. Perceptions of quality are discussed under Q3 and Q4 below; this section looks at reach (mainly through sales) and funding levels.

Sales

Paid sales of the three main franchised English-language periodicals in Wales (*Planet*, *New Welsh Review*, *Poetry Wales*) in 2011/12 averaged 549 per issue. Although two of the titles reported encouraging upturns in subscriptions in 2012, the decline in sales since 2006/07 stood at almost 30%.

What level of sales is it reasonable to expect English-language literary/cultural magazines from Wales to achieve? There are several ways of tackling this question:

- **by comparison over time.** A decline of 30% in sales in six years must be set in the context of UK magazine purchases generally, which declined by 13% between 2011 and 2012 alone (ABC top 100 titles) and by c33% since 2005; (<http://paidcontent.org/2012/08/16/digital-magazines-boom-too-little-to-grow-overall-sales>)
- **by comparison with other Welsh magazines,** past and present (see Malcolm Ballin, *Welsh Periodicals in English 1882-2012*, University of Wales Press, forthcoming). Owen M. Edwards's *Wales* is reported to have sold a maximum of 3700 copies in 1894-5, falling to about 1100 by 1897, when it closed. Thomas Jones's *Welsh Outlook* (1914-1933) reached 3-4000 sales at its peak, falling to 800 at the end. *The Anglo-Welsh Review* (1957-1988) settled for many years at around 750-800, and this figure, according to Malcolm Ballin, has since come to be regarded as a baseline figure for miscellanies of this kind. The fortnightly *Arcade* (1980-82) was selling almost 3,000 copies at its demise, but was radically different from any of the publications currently supported. *Cambria* (formerly funded by WBC) and the Institute for Welsh Affairs' *Agenda* (in which WBC currently funds a cultural supplement) also work to a wider brief, and have achieved sales well in excess of franchise norms;
- **by comparison with UK-targeted magazines.** An average 549 sales is equivalent to c11,000 in UK terms. Highest selling UK literary magazines are *The London Review of Books* and *Granta* (both over 50,000) and the *Literary Review* (c45,000). However, the UK Poetry Society's *Poetry Review* sells under 4,000;
- **by comparison with sales of comparable UK magazines in Wales.** On a title-for-title basis, Wavehill responses suggest that Welsh magazines (and especially *Planet*) compete well with Welsh sales of UK equivalents in most categories. However, this finding may conceal a less encouraging truth. By far the most popular UK literary magazine for readers sampled by Wavehill is *The London Review of Books*, but actual subscriptions (525: email from Nicholas Spice, 12 October 2012) represent only 2.1% of the UK total. (Wales has 4.8% of the UK population.) By contrast, there are 1,780 subscribers in Scotland: 7.2% of the total and much closer to its population proportion of 8.4%. This further illustrates the disproportionate fragility of the Welsh public sphere and the limited size of the market that can realistically be targeted;
- **by international comparison.** *The Paris Review* (USA), one of the most widely respected of literary magazines in the English language, has a total circulation of c17,000. In 2009, Canada's three main literary/cultural magazines had paid sales of between c2,000 and c5,500, yielding per capita sales similar to those in Wales;
- two of the most influential periodicals of the 20th century – T. S. Eliot's *Criterion* and F. R. Leavis's *Scrutiny* – achieved *maximum* circulations of, respectively, 1,000 and 1,500 copies; paid sales were lower still.

Funding Levels

During the same period (2006/07 – 2011/12), average subsidy per copy sold increased to £24.73. In 2012/13 core funding from WBC, although reduced by between 2.5% and 5% per title, stood at around 80% of turnover. This means that levels of gearing are at the higher end of a scale of international comparators. In 2011, sampled titles from Australia received, respectively, 69% and 74% of all income through subsidy, including university sponsorship. Sampled titles from Canada showed 40% and 64.3% of income from public subsidy. One subsidised title in England came out at 78%. To provide a fully rounded picture, however, the following points should be borne in mind:

- in Australia, Canada (and the USA and elsewhere, in part) cultural magazines may benefit from subsidy *simultaneously* from (a) a national arts funding body (b) a regional arts funding body (c) a university sponsor (sometimes worth hundreds of thousands of pounds a year) (d) other sponsors and (e) national postal subsidy schemes for the periodical press: this alone can be worth more than £75,000 a year for a single title;
- subsidies for many individual titles in other countries exceed those allocated in Wales. In Canada in 2011, one quarterly received c£130,000 a year. In Australia, two quarterlies received, respectively, £107,000 and £246,000 (including university donations): the latter was equivalent to £44.64 per copy sold;
- Welsh Books Council *per capita* expenditure on English-language periodicals stands at c84% of Canadian expenditure. Total expenditure in Wales works out at about 6 pence per head of the population, compared with about 7.4 pence in Canada.

The Review Panel concluded that the steep decline in sales of Welsh magazines in English is a source of major concern and calls for a radical response. It is right to emphasise that this decline follows general trends: we should not, therefore, presume that it is a specifically Welsh problem or even (or only) a reflection of the quality of individual titles. This is no source of comfort, however. Good, bad or indifferent – better or worse value for money than comparators elsewhere – the franchised magazines no longer operate at sustainable funding levels. At a time of historic shifts in the magazine sector, nettles must be grasped and bold measures enacted to make investment of public money more productive.

The Review Panel considered a number of possible adjustments to funding scheme conditions and guidelines to stimulate applicants' pursuit of additional income streams and to guard against future slippage. It also considered whether different criteria were needed to assess value-for-money in the case of digital-only magazines, to reflect possible trade-offs between increased reach, reduced production costs and lower subscription rates.

It RECOMMENDS

- setting a maximum gearing ratio (i.e. proportion of grant to generated income) for each title supported. Currently this ratio stands at an average c4:1. Applicants at the next franchise round should be required to project a maximum 2:1 gearing ratio

from (and including) the first year of their franchise term; grants offered and made would be cash-limited in line with this projection;

- pursuing digital-only options with print magazines that fail to project or meet this requirement (see Q7 below);
- developing equivalent but flexible value-for-money formula for funding digital-only magazines (see Q7 below).

Q3 Do the magazines provide reader satisfaction?

Current Provision

Respondents to the Review Panel Consultation emphatically restated the importance of Welsh magazines in English in principle but comments on current titles tended to be more critical. They were seen by many to lack ‘personality’, ‘cutting edge’ and ‘humour’; their appeal was restricted too much to ‘the universities and the cliques’; and they failed to engage with large areas of specifically Welsh experience. Several Wavehill respondents echoed these criticisms. They felt that the magazines had become ‘too bitty’, lacked a ‘strong editorial hand’ and needed to ‘be more thought-provoking’. They found a ‘lack of variety’ (p58) and ‘a deteriorating focus on Wales and relevant Welsh culture.’ (p.62) They scored as follows (out of 10) their satisfaction with magazine provision:

	NON-WALES-BASED		WALES-BASED	
	Availability	Quality	Availability	Quality
CURRENT AFFAIRS	7.6	7.5	4.5	5.7
LITERATURE	7.5	7.6	5.6	6.4
POLITICS	7.5	7.4	4.3	5.5
THE ARTS	7.2	7.2	4.8	5.7
HISTORY	7	7.2	4.4	5.6
POETRY	6.8	7.2	5.6	7.2

Wavehill concluded that ‘the gap is clearly perceived to be in the provision of magazines that are specifically about the [above] subjects *in Wales*’ (p.5). Only coverage of poetry was seen to match the quality of non-Welsh output.

At the same time, Wavehill also suggested that lack of acquaintance with current titles contributed to negative perceptions: ‘the more aware you are of the magazines available, the more likely you are to rate the provision higher’ (p.62). It called for better marketing to achieve this greater awareness. The Review Panel agreed that declining sales could be ascribed in part to a contraction in marketing budgets. (The same point is argued, with reference to print magazines generally, in *InPublishing* Jan/Feb 2013, p.11.) However, the comments of those who have ceased subscribing suggest that this is not a sufficient explanation. Also, even quite high levels of familiarity and approval seem to have little correlation with purchasing patterns. Through regular postings and links to free tasters,

the *New Welsh Review* has achieved 4,724 Facebook followers and reasonable levels of web browsing, but improved sales have not ensued.

Gaps in Provision

Specific content gaps noted by the Wavehill sample were, by a significant margin, history, current affairs and politics. These responses tallied, in large part, with chief areas of interest recorded in the survey, where scores for Welsh history and Welsh current affairs are close to those quoted for literature and exceed interest in poetry and the arts. This is, on the face of things, an encouraging finding and a plausible basis for policy shifts in these directions. Again, however, it remains unclear to what degree a gap or even a declared interest would be translated into sales if more appropriate product were available. For example, 41% said that they were interested in general history but only 16% had purchased a magazine in that subject area in the last year, even though titles are plentiful and varied. And while it is true that there is no 'general' magazine for young people – another gap noted by Wavehill – this is largely because such a formula has proved signally unsuccessful in the past and would be a risky enterprise to prioritise at the present time.

More persuasive were repeated calls in the Wavehill survey for new online initiatives: examples include a 'digital magazine that would make interaction possible, similar to an open mic event but an online version, where people could discuss, compare and share work or ideas'; 'a digital blog, chat room or social networking site'; 'an online outlet for opinion and new debate'; increased online marketing, including a 'digital preview or taster'; etc.

The **Review Panel concluded** that reader responses pointed to

- significant deficiencies and gaps in current provision
- an appetite for a more energetic and wide-ranging engagement with Welsh subject matter;
- expansion of online provision;
- the need for WBC to adopt more fluid, open-ended eligibility criteria in seeking to fill perceived gaps.
- the need for WBC to give more weight to the variety and quality of writing in funded magazines.

It **recommended** that funding structures and assessment criteria be reformed to take account of these conclusion. (See Summary of Recommendations on p.24.)

Q4 Do the magazines provide effective outlets for Welsh writers?

Several respondents to the Review Panel Consultation argued that the franchised magazines were dominated by a narrow clique (either academic or the favourites of certain publishers) and that they should aim to be more representative of the diversity of Welsh writing. Numerically, this argument is not sustainable. Analysis of four issues of the three main franchise magazines in 2010 shows that there were 399 contributions by 296 different authors (excluding editorial staff). Fewer than 15% were by repeat contributors, whilst 10% of authors had work published in more than one magazine in this period. These figures, by most standards, indicate that the net is being set very wide indeed.

Discussions with editors, too, revealed a strong desire not to be identified with coteries or factions. Indeed, it could be argued that anxiety about accusations of cliquishness is as definitive of the cultural sphere in Wales as are the accusations themselves. In his first editorial in *Wales* (1937), Keidrych Rhys was at pains to convince his readers that his magazine was a broad 'forum' where all good writers and critics could have their say: 'We are not a literary clique,' he said: '. . . once more we stress that we are with the People.'

If Keidrych Rhys's aspiration is a sound one, it also carries its own risks, and the Review Panel was concerned that a broad inclusiveness might be won at the cost of coherence and identity. A strong stable of regular contributors and a strong (even strong-headed) editorial lead are often the secrets of success for many cultural periodicals: this is how they create anticipation and a sense of community. The *New York Review of Books* has been glibly lampooned as the 'New York Review of Each Other's Books', but this is the kind of 'insularity' which many would happily embrace to achieve that publication's prestige, authority and success.

The **Review Panel concluded that** the franchise magazines offer outlets for a very wide range of writers in Wales. However, charges of cliquishness are too common and robustly made to be ignored. The Review Panel feels that these charges probably derive from a perceived sameness of tone and perspective referred to in readers' responses (see Q3 above). The names may vary but they are seen as belonging to quite restricted and predictable communities of interest and ways of writing, for which the shorthand epithet is generally 'academic'. Whether this perception is fair or accurate is almost beside the point: perceptions affect buying and reading habits and must be faced head-on. Appropriate editorial responses to this situation might well entail cultivating stables of contributors (leading inevitably to some loss of openness) in order to enhance identity and appeal. Good magazines are full of surprises and variety, but these virtues are not to be confused with sheer weight of numbers.

Q5 Do the magazines support the Welsh publishing industry as a whole?

The Review Panel Consultation brought responses from seven publishers, representing over 50% of total English-language book output in Wales in the fields of poetry, literature, arts, culture, history, politics and current affairs. The following comments were made:

- the magazines are vital in promoting titles to the reading public with a declared interest in writing from Wales. In that respect they are more important than equivalent magazines published outside Wales;
- some publishers have provided book prizes for competitions in franchised magazines and newspapers, with a positive impact on sales;
- there should be a closer selling relationship between publishers and magazines, e.g. to enable off-the-page sales;
- there should be a deeper two-way relationship between magazine editorial staff and publisher marketing departments re book publication scheduling;

- greater recognition of significant author anniversaries would help promote frontlist and backlist book titles;
- more editorial comment on the contemporary publishing scene/authors' new titles would create a greater sense of critical mass in publishing;
- the franchised magazines' scope has drastically narrowed. They are less interesting than they were;
- magazines have increasingly been aimed at the professional writer/academic/media professional rather than the general reader; the frame of reference in articles about arts policy and publishing is increasingly the impact on 'the industry' or 'the academy' rather than on Welsh culture as a whole. There is a danger that magazines become more insular and exclusive;
- the funding body (WBC) places insufficient emphasis on innovation;
- (one publisher) 'Welsh magazines have largely ignored us and it is in *Poetry* *London*, *TLS*, *Guardian*, *Rialto* etc that we have been reviewed. This is disappointing for a press whose output is printed and published in Wales.'

Only two bookshops responded to the Review Panel Consultation (itself perhaps indicative of their general indifference to this sector). The WBC's sales reps reported as follows on the basis of bookseller responses throughout Wales:

- English-language Welsh magazines are stocked by few independent shops or chains;
- new outlets (art galleries, museums, etc) have been sought and secured by WBC, but often with disappointing results;
- there is a low level of public awareness of these titles, partly because they receive little exposure in popular media (unlike some Welsh-language magazines);
- those that do stock the magazines often end up returning a large proportion once the new edition has been published;
- shops are reluctant to stock titles because of the short period permitted for returns; many outlets have incurred losses and been deterred as a result;
- many shops order magazines only on the request of a customer, and will cancel the order if that customer does not purchase every issue;
- many booksellers are deterred by subscription offers inside magazines, which they feel are detrimental to their sales, and cancel standing orders as customers take out subscriptions;
- price is judged to be high, the majority of magazines costing the same as a book;
- certain covers/features stimulate sales: advance notice of these would help in ordering appropriate volumes;
- the shift to digital is causing concern to booksellers who cannot see any way in which they will benefit from it.

The WBC also reported:

- that by late 2012 all Waterstones branches in south Wales (from Aberystwyth down) were now stocking English magazines from Wales; discussions had begun with north Wales branches;

- that there is some resistance amongst booksellers outside Wales to self-defining Welsh material, largely because of commercial concerns about defining target readership too narrowly. This applies both to books (such as the Library of Wales series) and to magazines.

The **Review Panel RECOMMENDS that:**

- plans for closer collaboration between magazines, book publishers and events promoters be required of franchise applicants
- WBC take a highly targeted view of bookshop promotion, pursuing only options that offer significant potential gains (e.g. current Waterstones discussions)
- WBC otherwise give priority to subscription marketing in any targeted support it offers magazines and in its requirements of franchise applicants.

Q6 How can the funding system promote innovation?

The Welsh Books Council's most recent invitation to tender noted four eligible categories: a poetry quarterly, a quarterly of literary culture, a quarterly of broad cultural interest, and a literary supplement in a high circulation/profile magazine. In three of these categories, only the existing franchise-holders (*Poetry Wales*, *New Welsh Review* and *Cambria*) made applications; in the fourth, *Planet* met competition from two new applicants (*Blown* and the Institute of Welsh Affairs' magazine, *Agenda*). In the event, funding was awarded to *Planet*, *New Welsh Review* and *Poetry Wales*, that is, the three titles that have occupied the designated categories since at least the 1980s. (Subsequently, *Agenda* was awarded a much smaller grant, also on a three-year franchise basis, for additional literary material.)

A frequent criticism from readers and other magazine editors is that tightly prescribed categories of this kind skew the pitch in favour of current recipients of funding and make it difficult for new and novel initiatives to make a successful bid. In its defence, the Books Council says:

'This is a potential problem that we have been aware of and have been attempting to address. As with many of the challenges of funding it seems to be a question of achieving a rather delicate balance. Categories were introduced into the scheme in order to ensure that the criteria prioritised by the panel were clear and that key types of publication (rather than specific publications) were funded. These were revised during the 2011 tender process in order to ensure that they were sufficiently broad to accommodate new applicants while maintaining a clear emphasis on Welsh writing in English. We did indeed see increased competition and, of course, a new applicant was successful during that round... [A] much more difficult task is to assess applications from new applicants without an established track record against applications from magazines whose performance, with regard to content, readership and management, has been proven over a number of years.'

The Review Panel appreciated this emphasis on track record and maintaining continuity. Reader loyalty, even at declining levels, was not something lightly to be sacrificed when the alternative was risky. However, while understandable, it felt that this protective attitude was at odds with the way magazines have traditionally worked and thrived. According to Peter Cole, director of journalism at the University of Sheffield, 'Magazines

have a great advantage . . . They have always been more speculative and flexible and are used to an “invent, then kill” cycle, launching quickly in response to a particular Zeitgeist, but not being afraid to fold when something doesn’t work and try something new.’ (Tim Holmes and Liz Nice, *Magazine Journalism* London 2012, p.145). The Review Panel recognised that funding systems in general, and not only the Welsh Books Council, had difficulty accommodating this essential volatility. This, however, was a challenge that had to be faced up to. The dominant feeling amongst questionnaire respondents, too, was that the current funding system tended to inhibit new developments and that space had to be created for new initiatives. With this objective in mind, the **Review Panel** considered a range of options:

Merging franchise and small magazine budgets

As the budget for small magazines is only £7,000, and recipients are eligible to bid for franchises, the Review Panel sees no benefit in absorbing this provision into the general magazines budget. This very modest investment helps safeguard a plurality of voices in Welsh writing, provides good value for money and should not be put at risk for marginal gains.

Capping franchise periods

Introducing a fixed maximum term (e.g. six years) for the receipt of franchise funding would tend to favour applicants who can draw on and develop significant alternative revenue streams. As an incentive to greater self-sufficiency and the pursuit of new partnerships, this option has merit; but the Review Panel suggests that it be applied on an ad hoc basis only, where the business model is appropriate. Blanket application of this principle would be too inflexible and could lead to undesired interruptions in provision.

Adopting and applying a broader interpretation of franchise categories

The **Review Panel** agreed that the WBC’s cautious interpretation of franchise categories has helped:

- retain the loyalty of some important market segments (including academia and arts practitioners)
- guard against excessive duplication
- ensure continuity of provision in priority areas
- safeguard the core purposes for which funding was first transferred from the Arts Council of Wales’s Literature budget in 2003.

Nevertheless, an over-emphasis on continuity and a risk-averse attitude to mission have arguably contributed to current stagnation. In particular, prescriptive slots have acted as disincentives to potential new applicants who know they must compete head-to-head with existing titles. Some feel that their aspirations are not easily contained within such definitions. Others believe that, although the scheme rubric seems to accommodate their proposals, unstated preferences are at work that in effect marginalise them. For its part, WBC strenuously maintains that its assessment procedures are fair, flexible and applied even-handedly.

The WBC has adhered consistently but conservatively to the terms of transfer and inherited definitions of remit. Indeed, it supports a spectrum of writing strikingly similar to that in place at the point of transfer. This spectrum is, however, narrower than had previously been the case. In funding *Planet* (in its original incarnation) and *Arcade*, the Arts Council of Wales had already embraced (in the spirit of Raymond Williams) a catholic interpretation of literature and culture that included current affairs, politics, history, the arts, sport, the environment and topical satire, as well as poetry, fiction and reviews. Although this interpretation was always under pressure from more conservative opinion and the editorial direction of the magazines themselves, it continued to underpin policy. In the opinion of the Review Panel, WBC needs to re-embrace and clarify this policy so that it can more easily encourage and deal with applications that move away from traditional literary and cultural miscellany models. This carries risks. It may well lead to the loss of established titles; and reluctance to destabilise going concerns, with all that means for staff and loyal subscribers, is understandable. However, without allowing the creative space in which new ideas can flourish, new enterprises emerge, and existing enterprises renew themselves, it will be much more difficult to reverse the current downward spiral.

The **Review Panel RECOMMENDS** that, in order to give applicants and itself maximum freedom of choice, and to encourage the pursuit of new readerships, the Welsh Books Council should:

- embrace a definition of ‘magazine’ that is fluid and as non-prescriptive as possible with regard both to format and subject matter;
- consider the alternative funding models described on pp.14-15;
- define more clearly ‘Welsh writing in English in all its forms’ so that the eligibility of good writing about all subjects (including history, politics and current affairs) is clearly signalled;
- commit more resources to digital development. This major and complex topic is discussed under Q7 below, where there is a recommendation concerning training programmes.

Reforming assessment structures

Some respondents felt that the cautious interpretation of eligibility and setting of priorities discussed above arises not only from the scheme’s rubric but also from institutional preferences. In particular, it is argued, the composition of its English-language Grants Panel means that WBC is likely to feel most comfortable with certain (more academic) forms of writing. For the same reason, some feel that the organisation is remote from the commercial realities faced by small businesses and lacks entrepreneurial nous.

The **Review Panel** agrees that the WBC’s English-language Grants Panel would benefit from a wider representation of expertise, particularly in small/micro-business development, magazine publishing, digital technologies and journalism, to engage fully with the sector as it is currently developing and to take forward new policy initiatives. It recognises that the Grants Panel has a wider brief than magazines alone, that external expertise (e.g. in the field of magazine marketing) is frequently called upon to lead specific

initiatives, and that some moves in this direction have already been made. This process should continue, so that issues of policy and priority are put under regular scrutiny from a variety of perspectives and from within the organisation. This does not constitute a criticism of the Grants Panel's current or past membership, which has always been of the highest calibre; nor does it imply that the WBC's client monitoring procedures are deficient: on the contrary, reporting and accountability mechanisms are amongst the most thorough (and, from the point of view of the clients, onerous) of any funding system known to the Review Panel.

The **Review Panel RECOMMENDS** that membership of WBC's English-language Grants Panel be diversified to ensure that a capacity for innovation is at the centre of its operation and is seen to be so.

Q7 How should magazines and the funding system respond to the digital revolution?

In crude market terms, digital publishing has yet to transform the magazine landscape. Deloitte's latest annual State of the Media Democracy Survey (April 2012) showed that 88% of UK readers still preferred to read print magazines and that, despite a sharp rise in the number of tablet devices, online magazine subscriptions remained flat at just 2%. ABC figures indicated that digital editions of magazines accounted for less than one per cent of total sales. Colin Morrison observed that most successes were being costed 'marginally', 'with origination and marketing being expensed against the core (i.e. hard copy) activity. For some publications (e.g. *The Economist* and *The Week*) in which the existing product translates readily into digital form, this may be a route to a profitable longterm. But for many other magazines which require much more re-working of content, the digital versions will simply not be sustainable after the demise of hard copy, least of all if Apple takes 30% of the revenue.' (http://www.huffingtonpost.co.uk/colin-morrison/winners-and-losers-in-med_b_1505427.html?just_reloaded=1)

There is also continuing ambivalence about the ability of online content to maintain the quality of traditional long-form journalism and review. As Nicholas Spice (*London Review of Books*) says: 'On a computer screen we tend to read with a more impatient and restless attention.' http://www.huffingtonpost.com/nicholas-spice/london-review-of-books-pu_b_539631.html Even when promoting its free online monthly literary magazine, *Five Dials*, Hamish Hamilton encourages subscribers (now exceeding 10,000) to print it out and enjoy it 'away from the computer'.

Hedging its bets, Deloitte recommended that magazine publishers prepare for a possible market shift in the future, and develop resources to begin creating digital versions. The recent Professional Publishers Association (PPA) Tablets and Publishing Report (November 2012) (<http://www.ppa.co.uk/news/media/ppa-tap-report-shows-increasing-tablet-sales-fuel-growth-in-print-and-digital-magazine-engagement>) provides some justification for this outlook. While it predicts a surge in digital magazine publishing, it also notes a positive correlation between print and tablet readership. Marius Cloete, Head of Research at PPA, comments: 'There is a strong link between tablet owners and magazine readership. A number of studies suggest that digital editions are reinvigorating the appetite for magazine media . . . digital editions are not eroding the

market for print editions, instead quite the opposite. Tablet owners are more likely to have read and purchased printed magazines in the previous three months than the national average, dispelling the myth that tablet owners are abandoning print in favour of digital. The two platforms instead appear to be working in combination to expand consumers' reading repertoire.'

There are several notable cultural titles that confirm this trend and belie the 'short online attention' fears. McSweeney's (<http://www.mcsweeney.net>) now has a successful app that delivers whole short stories and lengthy book extracts direct to readers' smartphones. The *Paris Review*, after offering a digital subscription via iPad in 2011, saw website traffic increase by 526%, with 630,000 monthly page views, 181,210 Twitter followers, 6,891 Tumblr followers, and 19,905 Facebook friends. The Canadian magazine *The Walrus*, with sales of 60,000, attracts up to 125,000 unique visitors every month. Australia's cultural and political quarterly, *Overland*, has enjoyed similar success. Editor, Jeff Sparrow, says: 'Online publication means articles can circulate far more widely than the print version. They can also become part of a broader online conversation, on blogs, social media and so on . . . we've shifted from the traditional print model of subscription to something closer to that of a public radio station, where subscriptions are a way for our community to show its support. Traditionally, *The Walrus* published quarterly. The online environment requires fresh content almost daily. The blog ensures that happens. More than that, though, the blog has developed its own personality. It's one of the best places to discuss politics and culture in Australia, and so many readers will now check it daily.'

In each of the above cases, the digital option is an add-on for subscribers to the print edition. But there are an increasing number of hybrids where the balance between print and online has shifted critically in favour of the latter. *Pank Magazine*, for example, launched as a print title in 2007, quickly spawned an online version; there are now monthly online issues, while a print issue appears only twice yearly. The site attracts 25-30,000 unique visitors per month.

A number of traditional cultural titles, such as *Books for Keeps* have chosen to abandon print altogether; others, like the American *TriQuarterly* (<http://therumpus.net/2009/09/from-the-department-of-possibly-lost-but-nevertheless-immensely-worthwhile-causes>) have been forced to do so by sponsors needing to save money. Other digital-only titles include the highly regarded *Los Angeles Review of Books*, a multimedia literary, cultural and arts magazine that successfully combines serious writing in traditional forms with web technologies. Like most digital magazines of its type (other examples include *Action Yes*, *Electric Literature*, *jubilant*), it is a not-for-profit enterprise, free to use and sustained by voluntary contributions and sponsorship.

This, for some, is the Achilles Heel of digital publishing: it has not yet proved that it can generate sufficient revenue to go it alone and maintain editorial quality. Ad Week recently reported that the readership of paid-for digital magazines rose by 47 per cent over the last year. (<http://tech.uk.msn.com/socialvoices/blogpost.aspx?post=37de5234-4fd1-45e0-b840-7301382b1cf1>) *Newsweek* magazine recently went digital only and merged with the *Daily Beast* after seeing print sales shrink from 3.1 million to 1.5 million in six years. Costs (including staff) have been slashed in order to bring a subscription for 52 issues down to a bargain basement \$24.99. As yet, it is impossible to tell whether this is mere

crisis management or a sound strategy for survival. In general, the new digital revenue stream is far from sufficient to offset the losses being made in print sales and the signs for the future are ambiguous. Some commentators are sanguine. International management consulting firm, Oliver Wyman, for example, accepts that 'for current subscribers, the power of print remains strong . . .' but 'for new subscribers, the value of quality interactive content is compelling; new customers are willing to pay the same prices as existing print subscribers for subscriptions to interactive editions and to some degree print/interactive bundles.'

(http://www.oliverwyman.com/media/OW_EN_CMT_PUBL_2010_NewDigitalFuture.pdf)

At the more radical end of the spectrum, it is precisely the interactive element, rather than new revenue potential, that gives digital media its special value. *Fictionaut* is an example of the successful open-access magazine, moderated by its users, that promotes participation and debate beyond the capacity of print, but is much more than a blogging or vanity publishing facility. 'The wonderful thing about running a site as open as *Fictionaut*,' says co-founder Jurgen Fauth, 'is that when you give up control, good things happen . . . When we gave users a way to form sub-communities, forward-thinking magazine editors and small publishers like *Keyhole*, *Praire Schooner*, *Barrelhouse*, *Mississippi Review*, *Flatmancrooked*, *Electric Literature*, *Everyday Genius*, *Word Riot*, *Gigantic*, *Wigleaf*, *Dogzplot*, *Featherproof*, and *Matchbook* started their own group on the site. Unlike Facebook fan pages, which offer little more than a handy way to fire off email blasts, *Fictionaut* groups allow members to post, share, and discuss their work . . .' But he adds that it was always meant to complement, not to replace, 'the singular taste, mission, and vision of individual editors and their magazines.' (http://www.huffingtonpost.com/jurgen-fauth/transcend-and-include-fic_b_345771.html)

There is some evidence that it is added value of this kind that might win the day. The UK's most popular digital-replica magazine is Hearst's *Cosmopolitan*, with 13,298 sales. The highest-selling digital title, however, is Future's *gadget* magazine, *T3*, with 17,682 downloads. *T3* 'is a fully-fledged interactive app rather than a digital replica,' reported *PaidContent*. 'T3's success ahead of the pack may suggest that what consumers want is not necessarily a printed magazine repackaged for tablets but a new kind of experience.' (<http://paidcontent.org/2012/08/16/digital-magazines-boom-too-little-to-grow-overall-sales>) It may. On the other hand, it may simply confirm that fans of gadgets are more likely to use iPads. The jury is still out on this question and is unlikely to deliver a simple verdict.

What does this mean in the Welsh context? Evidence for relevant digital engagement is thin. The online *Wales Arts Review* estimates that it has a core readership of over 2,000 (email to TB 29 January 2013). Wavehill figures show 60% of its sample visiting websites about current affairs in Wales; and 28% visited poetry websites, only slightly below the percentage declaring themselves to be readers of *Poetry Wales*. However, no Wales-based digital-only cultural publications have paywalls. Among the franchise magazines, only the *New Welsh Review* produces a paid-for digital edition. (Since late 2012 it has been available in epub, digi-sub and app versions.) Few new subscriptions or upgrades have been generated to date. At the time of writing, epub options are still being investigated by

Planet and *Poetry Wales*. It is difficult, therefore, to predict future sales patterns with any certainty. Should print editions be phased out tomorrow, short-term take-up might be limited by many factors, including print loyalty, inertia, and the demographics of tablet ownership. Wavehill found that 62% of its sample do not own a tablet computer. Whilst this balance is likely to change rapidly if Wales follows general trends (see <http://www.inpublishing.co.uk/digital/viewer.aspx?uid=25>), managing the shift will still require a demanding combination of boldness and careful timing, together with fresh approaches to marketing.

Review Panel Consultation respondents generally accepted that a major shift from print to digital was both inevitable and desirable. Online-only publishing would, at a stroke, eliminate the cost and practical drawbacks of print distribution; it would be much more responsive to events as they happen; it would provide a platform for innovation, including one-click-away coverage of readings and performances; it could be interactive and participatory; and it would broaden access, particularly amongst age-groups whose reading preferences have already shifted significantly in this direction.

Many, however, cautioned against a crude either/or approach. There was concern amongst writers that, at present, online-only publications offered neither the status nor remuneration they would achieve through print. This was echoed by publishers, who valued print reviews over what were perceived as more ephemeral, less authoritative online equivalents. Older age-groups, disproportionately represented amongst current readers of English-language magazines in Wales, would be adversely affected. The magazines themselves, whilst recognising creative and practical benefits, voiced concern at the difficulty of generating income from online content. Echoing Colin Morrison, they were also worried about the increased workload and cost of embarking on a hybrid enterprise.

Alex Clark comments:

‘The acceleration of digital culture is placing extreme demands on anyone involved in the newspaper or magazine industry, from enormous media groups to standalone publications. It would be terribly unfair to expect the editor of a small magazine to come up with solutions to problems that are foxing the heads of national or even global newspaper organisations (briefly, one might describe the challenges as managing the co-existence of print and digital content, at least in the short term; developing digital products; and finding a working economic model for running them). As it stands, the magazines are in the position of having to continue to fund print provision of their titles, while simultaneously betting on a digital future that is unknowable in its specifics but without a doubt on its way. In addition, the changes are not simply technological; they are also likely to have a heavy impact on editorial content, modes of consumption, and even writing itself. I would therefore recommend that the WBC investigates as a matter of urgency the possibility of supporting the titles through this transition, whether by training, or research into current developments or cross-pollination of information and resources. I should stress that I don’t think this is an optional extra. I think that to ignore the future would risk a real waste of funds and a possibly have a

catastrophic impact on the magazines, perhaps even to the point of their ceasing to exist altogether.'

The **Review Panel** concluded that WBC needed to promote a firm but measured shift to digital publishing both as the best available means of achieving value-for-money gains and as an exciting creative opportunity. This could be progressed through the changes in funding models and the training programme outlined on p.23. Such changes will have a number of knock-on implications for eligibility and value-for-money calculations, in particular with regard to:

- Free and paid-for content. Because of the swiftly changing digital landscape, the Review Panel urged adoption of a flexible approach capable of embracing a broad mix of publication models that might include both hard and soft paywalls and elements of free content.
- Moderated and unmoderated content. As greater coherence and a stronger editorial identity are amongst improvements most favoured by respondents, the Review Panel saw no reason to support unmoderated content; however, alternative (including user-based) models of moderation should be encouraged as a means of broadening participation.
- Gearing. Value-for-money calculations must reflect the fundamental economic differences between print and non-print models and the possible permutations of paid-for and free content.

In light of these considerations, the **Review Panel RECOMMENDS**

- retaining support for print magazines only when they achieve a specified level of income generation in proportion to funding (see Q2 above), thereby releasing funds for new developments;
- investing a portion of monies saved above in supporting innovative digital (online and tablet) options, to include paid-for content. These could be conventionally moderated magazines, or more interactive, user-moderated models, or combinations of the two;
- adopting appropriate value-for-money assessment models for digital initiatives. These would require careful negotiation and calculation, given the variables involved. In the next franchise period the agreed models would, as a minimum, need to offer a better return than the average £subsidy/copies-sold ratio for funded print magazines. WBC should consider whether to quantify this minimum difference;
- facilitating training opportunities (outlined on p.23 below), in particular to ensure that digital possibilities and alternative revenue options are fully exploited.

Conclusion

The Review Panel's task was to take the temperature of the English-language cultural magazine sector in Wales and investigate ways of promoting its health. As with any diagnosis, its findings focus on weaknesses and how to remedy them. The Panel is keen to

emphasise, therefore, that the sector still possesses considerable strengths: franchise magazines continue to publish much of the best writing in Wales, their editors work with exceptional commitment, energy and intelligence in an increasingly challenging environment, and their role in providing a platform for Welsh perspectives and voices is valued highly, if critically, by the great majority of those who come into contact with them.

Nevertheless, the current position of English-language cultural magazines is not sustainable. This is due in various degrees to the factors outlined above: poor and declining value-for-money, the threat to print and uncertainties about the digital future, a perceived lack of direction, urgency and bite in much that is published, and a narrowness of appeal and focus. The Panel is not alone in its assessment of their shortcomings.

Malcolm Ballin concluded his study of Welsh periodicals in English as follows:

‘The audiences they have established have tended to be weak and unstable, relative to their ambitions. Many of them have been over-reliant on public funding and there has been little movement towards financial independence or towards opening up alternative sources of support. The funding bodies have generated and maintained a narrow definition of what is cultural, artistic or creative and therefore considered deserving of popular support. Perhaps because of this, whole areas like film, popular music, theatre, sport, have had less coverage than might have been expected. The magazines have sometimes seemed to avoid controversy and reviewing has often appeared bland. There have been few successful ventures into humour or satire; seriousness, sometimes verging on solemnity, has been the preferred mode of address.’

Many consultation respondents echoed these sentiments. Editors may, with justification, respond by pointing to the exceptions. Jasmine Donahaye’s review of Gillian Clark’s *Ice* (NWR 99, Spring 2013), for example, is the opposite of bland. Gordon Main’s piece on liquid nitrogen storage in Pembrokeshire (*Planet* 209, Spring 2013) is a model of engaged journalism, informed but highly accessible, not in the least academic or solemn. There are many more such exceptions. Nevertheless, there is a growing consensus that the decline in popularity of the magazines has significant editorial implications and that the time is ripe for change.

There is also a larger narrative. This concerns the place of magazines, indeed of all media, in post-devolution Wales. In 1980 the editors of *Arcade* said: ‘English-speaking Wales faces a challenge to its identity which is only paralleled by the question-mark hanging over the future of the Welsh language.’ In response, they sought to provide ‘a cultural forum for the majority English-speaking Welsh’ as a ‘vital ingredient for the survival of Wales in any recognisable form.’ Their project was short-lived. In 2013, and despite devolution, the same challenges remain; it could be argued, in fact, that the cultural deficit has grown and in some ways we are even less well equipped to tackle it than we were thirty-three years ago.

There are different takes on this narrative. Zoe Skoulding observed (*Poetry Wales* Vol. 48 No. 3, p.2) that traditional understandings of identity have yielded to more ‘splintered multiple viewpoints’. Many rejoice that new narratives of ‘internal difference’ have supplanted more monolithic constructs of belonging, and that the magazines have followed suit. Back in the heady days of 1997 Robert Minninnick relished the prospect of a

move away from ‘the dour, regional introspection that underlies much art in this country’ towards a greater willingness ‘to look at the wider world, read about it, and visit it. . . Then come back and for all our sakes share what has been discovered.’ Others, however, lament what they see as the passing of a culture of shared engagement. Both perspectives have validity. In the Review Panel’s opinion, the challenge is to help future editors and publishers do justice to ‘splintered multiple viewpoints’ whilst maintaining that sense of community and distinctiveness without which no magazine can flourish. It is unwise for WBC, or any funding body, to second guess or prescribe how this might be achieved, but it is what they must require of the magazines themselves, and require it more vigorously than ever.

Alternative Funding Models

The **Review Panel** considered a number of alternative funding models with a view to stimulating innovation and increasing the variety and reach of English-language magazines in Wales. The three models outlined below illustrate different points on a broad spectrum of options, from the more open to the more closed. Choice of option will depend on the role which WBC judges is most appropriate for itself. Should it prescribe specific magazine ‘slots’ covering the areas it wishes to prioritise? Or, on the other hand, should it permit as open a field as possible and allow publishers the freedom to develop their own creative solutions?

The Review Panel identified the following main strengths and weaknesses of more open and closed models.

The strengths of a more closed model are:

- it is easier to administer (i.e. advise applicants and justify decisions) with more fixed eligibility and assessment criteria
- it reduces the risks of duplication and continuing gaps in provision

The weaknesses of a more closed model are:

- it risks replicating the present structure, which has contributed to stagnation
- it risks excluding exciting creative initiatives which do not correspond to the advertised rubric

The strengths of a more open model are:

- it allows a more organic and flexible response to new initiatives
- it transfers a greater degree of ownership of the sector, and its future direction, from central bureaucracy to the sector itself

The weaknesses of a more open model are:

- it carries a greater risk of leaving gaps unfilled or oversubscribed
- it means decision-making becomes less structured and more interpretative.

The **Review Panel RECOMMENDS** that, in the light of current stagnation and the need to promote innovation, WBC embrace a more open model (as in Models 1 and 3 below) in order to allow greater flexibility and responsiveness to new creative initiatives.

Model 1 [Open]

Objective: to support English-language magazines based in Wales and dedicated primarily to

- good writing, review and debate of all kinds, including poetry, fiction, the arts, discussion of culture, media, current affairs, politics, history and the environment
- providing outlets for Welsh writers in these areas
- engaging with these areas particularly as they relate to Wales
- expanding the readership in Wales for writing in these areas

The scheme is open to print, digital and multi-platform publications and to supplements in existing publications that publish work in some or all of the areas outlined above.

Priority will be given to titles that exploit at least two of the 'media quartet' of web, tablet, mobile and print. There is no stipulation regarding frequency or length.

The applicant's budget must project generated income at no less than one third of total revenue from (and including) the first year of the franchise. Priority will be given to those applicants who can demonstrate secured contributions (including contributions in kind) from partners or other third parties.

Assessment criteria. [These will include all current criteria, but with the addition of new elements that will require applicants to take on board the findings of this review.]

Model 2 [Closed]

Objective: to support English-language magazines based in Wales [other criteria as above], as follows:

- a current affairs and general cultural magazine appearing at least bimonthly in both print and digital formats
- a digital poetry magazine
- a digital magazine dedicated to reviews, fiction and the arts
- an open-access, participatory website, dedicated to sharing and promoting new creative work in all media
- a supplement in a large circulation national publication

Model 3 [Hybrid]

Fund A (c50% budget): Open

Objective: to support innovative magazines to a maximum £25,000 per venture.
[Eligibility as in Model 1]

Titles are expected to be innovative and exploratory but coherent and exploit at least two of the 'media quartet' of web, tablet, mobile and print.

Fund B (c50% budget): Closed

Objective: to support two magazines in the traditional literary and cultural categories to a maximum £53,000 for one main title and a maximum £28,000 for one subsidiary title.

Training

The **Review Panel RECOMMENDS** that WBC pursue relationships with appropriate organisations, including media departments in Welsh universities, with the intention of sharing and spreading ideas about best digital and print practice, new business models, production processes, etc. The following is based on discussions with Sara Moseley, Welsh Government's Director of Communications, currently on secondment to Cardiff University's School of Journalism, where she is Development Director with responsibility for taking forward the new Centre for Community Journalism.

The Centre for Community Journalism is in a position to set up training opportunities for the editors, publishers and staff of currently funded magazines, including those in receipt of very small grants, and perhaps also offering the same to potential applicants for the next round of funding. The training would be informed by research being undertaken in the school and the CCJ, but researchers would also benefit by working with publishers to see how their ideas can be put into practice.

Training and support would be tailored to fit needs and explore the potential of publishers. However digital development and delivery as well as sustainable business planning would form a key part of all training. This would include gathering content and building and engaging with audiences digitally; publishing at low or no cost on multiple platforms; maximising the use of social media and existing networks to sustain and grow; and exploring and adapting business models. Overall, the approach would be to explore and develop a mutually beneficial network of publications focused on Welsh cultural and civic life with linkages of interest, audience, practice and cost.

These comments are offered for illustrative purposes only: WBC is urged to make contact with other relevant bodies that might also be interested in partnership or can offer appropriate training opportunities, including Skillset Media Academy Wales (a partnership between the University of Wales, Newport; University of Glamorgan, Swansea Metropolitan University and Aberystwyth University), media and journalism departments elsewhere, and the Publishing Training Centre. Separate budgetary provision should be made to facilitate this development.

SUMMARY OF RECOMMENDATIONS

The Review Panel recommends that WBC

- 1 Set a maximum gearing ratio (i.e. proportion of grant to generated income) for each print title supported. Currently this ratio stands at an average c4:1. Applicants at the next franchise round should be required to project a maximum 2:1 gearing ratio from (and including) the first year of their franchise term and to show secured additional income streams on applying.
- 2 Pursue digital-only options with print magazines that fail to project or meet the requirement in 1. above.
- 3 Draw up and implement equivalent value-for-money criteria for digital titles.
- 4 Require plans for closer magazine-publisher/promoter collaboration from franchise applicants.
- 5 Take a highly targeted view of bookshop promotion, pursuing only options that offer significant potential gains (e.g. current Waterstones discussions) and otherwise give priority to subscription marketing.
- 6 Support innovation through
 - (a) embracing a definition of 'magazine' that is fluid and as non-prescriptive as possible with regard both to format and subject matter;
 - (b) defining more clearly 'Welsh writing in English in all its forms' so that the eligibility of good writing about all subjects (including history, politics and current affairs) is clearly signalled;
 - (c) implementing a new franchise tendering model (see p.21).
- 7 Require franchise applicants to respond creatively to critical reader responses summarised in this review, concerning coherence, quality and reach.
- 8 Commit more resources to digital development through
 - (a) retaining support for print magazines only when they achieve a specified level of income generation in proportion to funding (see 1 and 2 above), thereby releasing funds for new developments;
 - (b) investing a portion of monies saved to support innovative digital options. These could be conventionally moderated magazines, or more interactive, open-access models, or combinations of the two;
 - (c) facilitating training opportunities, in particular to ensure that online possibilities and alternative revenue options are fully exploited.
- 9 Diversify membership of WBC's English-language Grants Panel to include more experience of small business development, digital technologies, magazine publishing and journalism.

Tony Bianchi
Alex Clark
Tim Holmes

1 March 2013

Appendix 1

English-language magazines currently funded by the Welsh Books Council

Franchise Magazines	Frequency/ year	2012/2013
<i>Planet</i>	4	70,300
<i>New Welsh Review</i>	4	58,908
<i>Poetry Wales</i>	4	28,540
<i>Agenda</i> (supplement)	3	8,000
Small Magazines		£165,748
<i>Wales Arts Review</i>	digital	1,500
<i>Roundyhouse</i>	1	540 (+ £464 from 2011)
<i>Envoi</i>	3	1,800
<i>Red Poets</i>	1	(£500 from 2011)

Appendix 2

Magazine Review Panel Consultation Responses: Composite

Strengths of current titles

English-language magazines in Wales...

- contribute towards a sense of Welsh identity
- allow Wales to 'speak to itself'
- promote dialogue and mutual awareness among English-language writers in Wales
- relate modern Welsh experience to wider trends in critical and political thought
- present Wales in an international context

- are important for younger writers seeking to establish themselves
- publish many of the major writers working in Europe today
- promote diversity of talent
- review work published in Wales which would not normally get critical attention elsewhere: Wales is almost entirely ignored by the UK broadsheets
- demonstrate that there's quality writing of all kinds coming out of Wales
- offer bold, candid reviews
- offer Welsh perspectives on worldwide issues & present English-language culture of Wales as distinctive & different from English culture

Weaknesses of current titles

English-language magazines in Wales...

- fail to reach beyond the universities and the cliques
- fail to speak to ordinary mortals
- fail to reflect the reality of contemporary Welsh existence for swathes of the population
- don't attempt to educate new or young readers
- tend to champion the 'usual suspects', so that they seem like a closed shop
- are sometimes dull and predictable
- need to be more eclectic
- lack fun and humour
- lack a cutting edge
- fail to offer Welsh perspectives
- don't look beyond Wales enough
- provide insufficient space for short stories
- lack contemporaneous reporting: they follow when they should lead
- too often pull their punches, play safe
- fail to ventilate controversy
- lack focus, personality, style, ambition, enthusiasm
- fail to engage with current affairs
- fail to serve visual art, theatre and music
- lack in-depth articles about the arts in Wales
- are too expensive

Challenges perceived by magazines

- Maintenance of sustainable income revenues from advertisers in times of general financial constraint and loss of some advertisers to free internet platforms: need to think of alternative revenue raising strategies
- Distribution, via subscription and warehouse: even to remain static requires a certain level of work, growth needs constant communication and efficient admin back up.

- Competition for subscriptions and keeping subscribers on board in a competitive market, particularly during recession
- Engaging with the digital future of publishing.
- Continued development of editorial vision to respond to and shape Wales's literary cultural identity in both local and international contexts.
- Lack of funds for competitive author, artist and designer fees; for colour printing; for commissioning online content; to support planned digital developments
- Need chance to renew, stabilise and publicise after a protracted period of radical grant cuts and structural changes.

The Funding System

- The system is transparent and fair.
- The three-year franchise system works well in terms of providing stability and continuity
- There is not enough emphasis on refreshing from the funding body.
- A different distribution of funds between small magazines and larger ones would be welcome.
- WBC funding distorts the market and makes life in the commercial media world harder than ever.
- The criteria appear to be fitted to the present recipients of the grant: there is little incentive for magazines in Wales to broaden their scope and quality or engage new readers
- The present system offers disproportionate financial support to highly-specialised, low-volume publications which are primarily of academic value: too little is spent on reaching a wider audience for the literature of Wales.
- The criteria for English and Welsh language magazines are different: is this reasonable?

The Digital Revolution

Individuals:

- Digital treatments should be supportive/expansive rather than competitive
- Printed magazines serve better as journals of record than digital.
- Online magazines can be stumbled upon by accident, by readers not necessarily looking for Welsh material, while only a small number of readers concentrated in Wales will take out a subscription to the major print magazines.
- Online magazines can be larger and cheaper to run; topical material can be published more quickly, and the editors can feel less dominated by deadlines
- Faster, less wasteful, more responsive.
- Welcome or unwelcome, the shift to digital will happen
- The way a magazine is structured means that you are more likely to flick backwards and forwards through the different sections than with a novel: a print version is preferable for doing this.

- Would welcome a shift in emphasis from print to live performances, for performance poetry to be seen as important as page poetry.
- Put them on Kindle and iPad or smart phone apps.
- Digital would solve the biggest problem over night: distribution
- Professionals will not write for online-only magazines because they don't pay.
- Purely online versions would alienate many readers
- From a writer's perspective, being paid to have your work printed in a physical publication is far more important than having it typed onto a website.
- To cast it as an opposition is the most damaging thing. There could be a creative outcome in which the two sectors fertilise each other.
- There has to be a balance, but it is not right at the moment. The Caledonian Mercury is worth a look. With subsidy we could do something similar in Wales (with Click on Wales, Wales Home etc as potential launch pads).

Publishers:

- A positive review of a title in one of the Welsh magazines in English would carry far more weight than a positive online review... and is far more likely to be quoted as a back-cover recommendation
- Well-produced magazines have a longevity and visual presence that contrasts with the ephemeral nature of digital products, where digital files face an uncertain future.
- Magazines are becoming less important as much slower to review than websites.

Magazines:

- This is the main challenge to subscription and sales base, i.e. readers are migrating from print to e-pub, online and app content, with a particular impact of accessing free online content (especially reviews), and the slow emergence worldwide of a pay-wall-protected model for online and app content.
- There is now competition for loyalty of potential contributors, because of the role of online forums, blogs and social networking in creating a sense of literary community as well as an instant mode of expression.
- Multi-platform means more work, as magazines have to be re-produced for digital format, and new readerships have to be identified and communicated with.
- The financial returns on this investment will be minimal whilst the effort being put in will be huge
- Will eventually yield lower costs in terms of printing and distribution/postage.
- Will allow greater flexibility, variety and interactivity
- WBC should fund the development of a template app that magazine publishers could then populate with specific content/ training for this also provided by funding.
- While the electronic media offers valuable 'pathways into readership' – particularly through content sampling and on-line subscription facilities – it is premature to think that it will replace hard copy.

Priorities for Development

Individuals:

- Sell poetry magazines at more readings
- Create magazines that are more fun, satirical, eclectic, bright, challenging, less reverent
- Support popular magazines about history and geography of Wales.
- Support a Welsh visual arts magazine
- Support popular culture magazine
- Widen scope of writers
- Give more support to new writers
- Cover art forms other than literature
- Launch short-story magazine
- Publish weekly/fortnightly Welsh newspaper/magazine that deals with general news, including considered articles on cultural events
- Give them away free online.
- Make them more visually appealing and cheaper, less like books and more like magazines
- Get more reviews, stories and poems into existing general magazines, journals and newspapers to reach a wider audience.
- Improve the magazines we already have
- Broaden readership. Make a determined bid to break out of the ghetto
- Reduce subscription rates for low earners and the elderly etc.
- Ensure easier access: sell/launch in places that are not associated with 'high culture' like leisure centres, pubs and hospitals.
- Launch Welsh versions of *New Statesman* and *Granta*
- More themed issues
- Do <http://www.theartsdesk.com> for Wales
- Emulate new partnerships emerging that draw together word & image, like McSweeney's and Electric Literature (both US) e.g. collaborations with emerging Welsh artists, linking up with Artes Mundi or g39, or the Venice Biennale Wales; involving bodies such as National Museum, National Botanic Garden or places where people socialise and create new work such as Milgi's & Chapter, Galeri Caernarfon, etc. It would widen the circle and encourage people to think of the magazines as places where their work should be profiled and discussed.
- Launch magazine for a younger market with a cross-arts brief
- Launch one large, beautiful literary-cultural-political journal, with real weight and gravitas, with solid marketing budget to broadcast its existence and to fund quality events cf Irish Pages: rooted cosmopolitanism. Don't mistake variety for meaningfulness.
- Launch something like *Arcade* - a bit more broadly based, less concerned with 'appearance' and appearing more frequently
- Launch magazine that follows the spoken word and small press scene in Wales, i.e. reviews In Chapters, live performances at the Promised Land, etc.

- Get involved with open-mic nights, slams, literature festivals, etc. with on-line interactive presence. Include live streams and musical collaboration
- Support cultural activities on a community level.
- It is not the business of funders to be defining the content and approach of magazines but rather to be supporting vitality where it exists and when it emerges.
- Get some magazine journalists on board, rather than the mish-mash of career poets, proof readers, big-mouths, academics, has-beens, wannabees...
- Launch lively and informative monthly built on a rock-solid foundation of good reporting, good editing and good domestic and international content.
- Emulate *Golwg/ Barn*. i.e. more journalistic/current affairs publication, especially in light of the severe decline in the circulation and quality of Welsh newspapers (especially the *Western Mail*).
- Promote more vigorously
- More big names (out of Wales as well as in Wales) would make them more attractive to emerging writers to submit to.

Publishers

- Should offer special discounts for mag readers/ Off the page sales
- Need lively arts/ review mag/website that would also promote dialogue with readers through social media
- Need deeper two way relationship between magazine editorial staff and publisher marketing departments re book publication scheduling.
- Greater recognition of significant author anniversaries would help promote frontlist and backlist book titles.
- More editorial comment on the contemporary publishing scene/author's new titles would create a greater sense of critical mass in publishing.
- Widen scope to take in writers who have practised in a wider range of genres, inc. screen writing, drama.
- Launch book magazine aimed at the general consumer, which might also help bind together the book trade in Wales.
- A regular book column in the *Daily Post*
- Scrap *Planet*. Its purpose is vague and it prints a great deal which is entirely un-Welsh in content or writer origin.
- More work with magazines at literary festivals, competitions etc, e.g. through offering free copies of books
- Subsidise more reviews. (Recent grant cuts have led to fewer reviews.)
- WBC should employ a dedicated sales representative for magazines
- Mags should make the practicalities of submitting books for review easier e.g. identify reviews editor, give clear contact details, schedule, etc.

Response of the Welsh Books Council to the Review of English-language Magazines

In February 2012 the English-language Publishing Grants Panel agreed that an independent review of English-language magazines and the funding streams available to them should be commissioned. The decision was taken in recognition of the valuable contribution made by magazines to the culture of Wales as well as an awareness of the changes and challenges faced by the industry as advances are made in digital publishing and as financial sustainability becomes increasingly vital in a difficult economic climate. Sales of funded magazines had fallen significantly since 2006 (though small but encouraging increases have been noted very recently). The Panel acknowledged that this could be explained, to some extent, as part of a larger trend in the sector as readers became increasingly used to reading free web content and later, as the financial crisis affected buying habits. The decline in sales had to be addressed, however, as public money was spent on magazines that were reaching fewer readers every year. As a recipient of funding from the Welsh Government, the Welsh Books Council has a responsibility to ensure value for money across its grants schemes. The Panel also felt that further opportunities should be created to ensure that good-quality applications for funding can be made by a wide range of magazines. In addition to this, they wished to gather the opinions of readers and they recommended that a market research company be employed alongside the independent review. The findings of the market research survey follow this paper. The importance of magazines within the publishing industry is fully appreciated by the Panel and by the WBC and it was the desire to ensure the future health and continued vibrancy of this sector that led to the decision to commission the review.

The recommendations made as part of the review were accepted at the July 2013 meeting of the Grants Panel. The Panel thank Tony Bianchi, Tim Holmes and Alex Clark for their thorough and thoughtful work. After a full discussion, the Panel decided to implement the following funding model, which is a more open version of the 'hybrid model' suggested in the independent report. It is hoped that the new scheme will create opportunities for new magazines, broaden the criteria to allow a range of magazines to compete for funding and allow greater freedom for magazine publishers to choose the frequency of publication and their preferred format. The WBC will develop systems to measure digital readerships, which as the publishers extend their provision in this area, will reflect the reach of magazines on-line and via e-reading devices. Training will be provided to enable magazine publishers to keep abreast of

developing technology as well as providing courses in topics such as managing small businesses, sales and marketing. There is an emphasis on developing digital content, and attracting new readers in this way, but also recognition that this may not be the preferred or indeed most suitable format for all readers. Provision for literature has been maintained in appreciation of the importance of the role of magazines in presenting a platform for writers and, as they feature reviews and literary debate, in their support of the work of the publishing industry as a whole.

The WBC will aim to fund general and literary magazines at a gearing ratio of grant income to income generated from other sources of 2:1. This means that magazine publishers will be expected to generate at least a third of their income (which can include funding in kind) while two thirds may be provided by the grant (up to a capped sum). Alternatively, a percentage of costs can be met by the grant where this is more practicable, for example in the case of a digital magazine with limited ability to generate income or a free magazine. Further explanatory notes and a timeline for implementation follow the model and full guidelines and terms of conditions will be available when the next application round is advertised.

Development of the hybrid model

The total funding for this scheme is £175,000. No sum is ring-fenced for any one area except for training but it is likely that funding will be awarded in all the areas of focus described below.

Funding will be awarded for up to a four-year period.

Applications will be considered that focus on one of the following areas:

FUNDING FOR DEVELOPMENT

Seed funding will be provided for new, innovative ventures featuring good, engaging writing.

Grants from this fund will be provided to publishers of magazines based in Wales for one franchise period only (after which applicants may apply for funding either as 'general' or 'literary' magazines). Digital and/or print applications are eligible. Grants may be given to multiple recipients. It is anticipated that funding for magazines of this kind would range from £2,500 to c. £10,000.

Please note that while funding in this area aims to develop fresh ideas and emerging ventures, new applicants are equally welcome to apply for grant-support under the other headings instead.

FUNDING FOR GENERAL MAGAZINES

Grants will be provided to publishers based in Wales for general magazines featuring good writing and high-quality journalism, review and debate of all kinds. Magazines should include coverage of a range of topics. Possible subject areas could include current affairs, politics, history, economics, the arts (e.g. visual arts, music, drama, dance, and literature), culture (including popular culture), media, the environment, sport and leisure.

Minimum average circulation per issue across all platforms is set at 1,000. We will aim to fund at a gearing ratio (i.e. proportion of grant income to income generated from other sources) of 2:1 or up to 50% of total expenditure.

Eligible magazines should be available in more than one format (e.g. web/app/epub/print etc.). Grants may be given to multiple recipients. It is anticipated that funding for magazines of this kind would range between £2,500 and £65,000.

Applications may also be considered for the inclusion of book-related supplements in magazines with a large circulation on any combination of multiple platforms (minimum average circulation per issue across all platforms of 2,000).

FUNDING FOR LITERARY MAGAZINES

Funding will be provided for engagingly written, good-quality literary magazines in Wales which cover one or more of the following areas as their primary focus: short fiction, poetry, creative non-fiction, literary review/criticism. Literary writing should be the chief focus of magazines funded in this area but it needn't be the sole focus.

Magazines can have a single focus or feature a combination of the above. It is envisaged that the allocation of funding would ensure the fewest gaps possible in provision, while avoiding significant overlap of material. Magazines funded under this heading must contain book reviews. Formal academic journals are not eligible for funding under this scheme.

We will aim to fund at a gearing ratio (i.e. proportion of grant income to income generated from other sources) of 2:1 or up to 50% of total expenditure. Grants may be given to multiple recipients.

Eligible magazines can be digital only or delivered on multiple platforms (including print). Publishers may choose to present different issues of the same magazine on separate formats should they wish (for example, regular digital issues plus less frequently published print publications, such as monthly digital issues plus an annual printed digest, two digital-only issues plus two print and digital issues per year etc.). The minimum average circulation per issue of a single-focus magazine will be set at 400. The minimum average circulation per issue for a multi-focus magazine will be set at 500. It is anticipated that funding for magazines of this kind would range from £2,500 to c. £55,000.

TRAINING c. £5,000

This could include courses, mentoring schemes and consultancy. Training will initially focus on digital development and managing small businesses and will be developed according to needs identified across the sector.

Please note that when evaluating applications and determining the level of grant to be awarded, in addition to the proposed quality of the magazines, consideration will be given to value for money. This will take into account the size of the readership, prudent and efficient management of costs, the projected level of grant per copy sold, the ability to generate income and the ability to attract sponsorship from other sources.

Magazine publishers wishing to apply for sums of £2,500 or less or magazines with a circulation of less than 400 copies should consult the guidelines for the Small Literary Magazines Grant.

Further notes:

Four-year funding period

Grants will be offered under this scheme for four years instead of the current three-year period, thereby offering a longer period of stability in difficult economic circumstances. It is also anticipated that there will be increased competition under the new system. Four years will give each successful magazine sufficient time to develop a readership and prove its worth before the

next funding round. Grant recipients will still be required to provide annual reports, sales figures and financial information and they will attend an annual review meeting.

Competition and new applicants

Funding for development will enable publishers to develop fresh ideas, new ventures and innovative magazines. After the initial four-year period of funding, magazines in receipt of a grant from this fund could either become self-sustaining or apply for grant-support from either the 'general' or 'literary' funds. This will promote healthy competition, high standards and greater value for money. While financial support offered in this area will be specifically for development and innovation, new applicants can compete for grants under any of the areas funded under the scheme.

Broadening the criteria

Funding for 'general' magazines will broaden the scope of the grant, allowing for greater variety in content and approach. Potential subject areas can cover a wide spectrum of topics, issues and concerns that contribute to the culture of Wales. There are no stipulations regarding frequency of publication or length. Applicants will be expected to produce and adhere to a publication schedule, which they will set out in their application.

Support for literary material

While it is anticipated that a broader range of material may be supported, funding for literary magazines will still be available. The opportunities for Welsh writing in English to gain attention in the largely London-based UK media are limited. It is therefore important to support magazines that provide a platform for Welsh writing and reviews of books published in Wales, thus strengthening the publishing industry as a whole. The criteria for funding in this subject area have also been made more open and flexible to allow greater freedom in publication format and frequency and for focus on single or multiple aspects of literature.

Training

Training will initially focus on digital development and business management as recommended in the independent report and future training will be tailored towards the most prevalent and pressing needs of the magazines. Training could be delivered by bodies such as the Publishing Training Centre, the Professional Publishers Association and Universities working in this area such as Cardiff School of Journalism. The WBC will investigate other potential partnerships as well.

Grant levels

The grant levels for the 'general' and 'literary' funds will be aimed towards reaching the grant to generated income gearing ratio of 2:1 recommended in the report of the independent panel or at 50% of expenditure. The 'gearing' method would mean that the grant would provide two thirds of the total income while magazines would be expected to generate a third of their income themselves, for example, through sales, advertising revenue, sponsorship and costed funding in kind. The 'gearing' method will be employed in the first instance, while the award of a percentage of costs will be used if successful magazines cannot generate a reasonable level of income. This will make it possible to fund digital-only magazines that cannot generate the necessary income, for example, or magazines that are made available for free. In addition to income and costs, consideration will also be given to other indicators of value for money. This will include the size of the readership likely to be reached, the projected level of grant per copy sold, and the ability to attract sponsorship from other sources.

While digital publishing is becoming an increasingly important part of the magazines sector it can also be an area in which it is very difficult to generate profit. As one potential means of generating income from digital content, the WBC is currently working on an app portal, Welsh Books / Llyfrau Cymru for books and magazines. More information will be available once the pilot project has been completed.

Funding in kind

Applicants may include costed funding in kind as part of the income against which the grant level will be calculated. This could include free or discounted use of materials, equipment, venue hire, office costs, use of network computer systems and email, postage, specialist support or waived fees, marketing and promotional support, volunteer time, consultancy, and expenses for a maximum number of board or committee members. In order to value the funding in kind applicants should research the cost of resources and wherever possible obtain quotes or equivalent, which should be submitted with their application. Work experience and internships may be included but these should be properly arranged and constitute a mutually beneficial arrangement and should never be arranged to circumvent national minimum wage regulations. The tender document will offer guidance on funding in kind to ensure that it is valued consistently across the scheme.

Circulation

The manner in which people are reading magazines is changing and our measurement of the reach of magazines must adapt to reflect this. This needs to be balanced with the fact that the funding allocated is derived from public subsidy and so we must ask for quantifiable information that will stand up to scrutiny. Circulation figures can include paid sales and

subscriptions (including subscriptions as part of paid membership – though such magazines must also be available for purchase to the general public) and average monthly unique visits to websites where there is significant content such as articles, interviews, podcasts etc. (hits on websites that merely promote or provide information about the magazine will not be considered as part of circulation, though this information can be collected separately). A combination of figures from different formats will be considered in order to meet the minimum circulation figures for both ‘general’ and ‘literary’ magazines. It should be stressed that these are minimum thresholds for eligibility for the grant and we would expect the figures to be higher than this and to increase as the magazines develop their digital provision. We acknowledge that it is important to note the sources of figures separately since they may not always be perceived as carrying equal weight. For example, a subscription to a magazine shows commitment to reading a whole publication in a way that receiving free copies or downloading single articles does not. The method of recording circulation figures following the development of digital material is still a relatively contested subject within the publishing industry and we have sought advice on this from the Professional Publishers Association (formerly the Periodical Publishers Association). We will continue to monitor and review the types of figures we collect as the scheme develops and as technology advances. We will also continue to set sales targets for each magazine that encourage reaching new readers as well as maintaining existing readerships.

Timeline

A more detailed timeline will be available in July 2014 but the following serves as a guide for prospective applicants. The tender will be advertised in July 2014 with a deadline for expressions of interest in August 2014. The deadline for applications will be set for early autumn with interviews held and applicants informed of decisions in late autumn 2014. Funding for the successful applicants will begin on the 1st of April 2015.

Market research of readers of English-language magazines published in Wales

A report by Wavehill for the Welsh Books Council

January 2013



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Report version: Final

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Executive summary

This report sets out the findings of research undertaken for the Welsh Books Council, hereafter referred to as WBC, into the reading habits and preferences of readers of English-language magazines published in Wales.

The primary research for this project was undertaken in two phases. The first was a survey of 445 readers undertaken online and by telephone. For Phase 2, follow up in-depth telephone interviews were undertaken with 10 readers to further discuss some of the key issues identified by the main survey and to collect additional qualitative data.

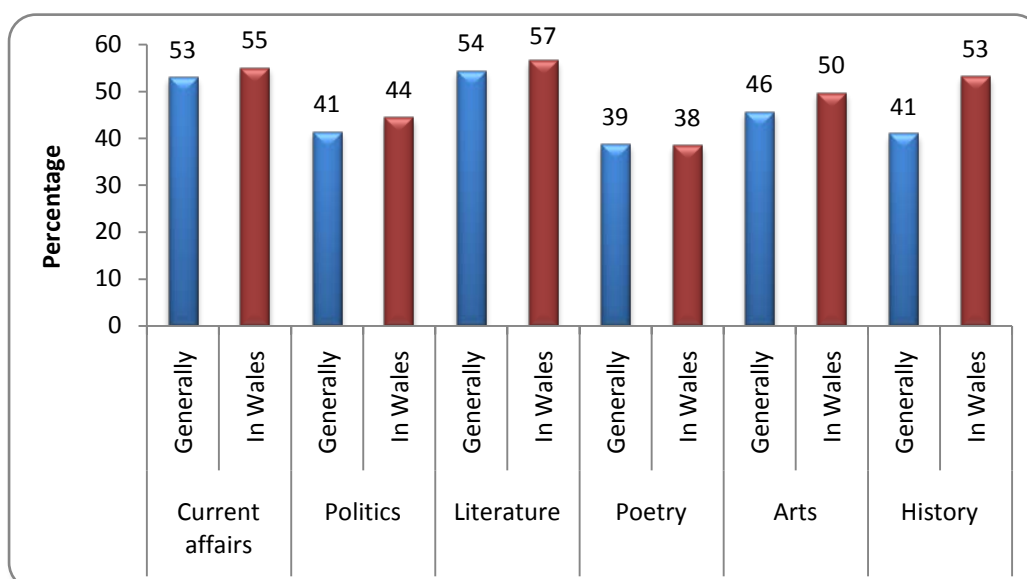
Phase 1: Findings of the survey

The survey was targeted at readers of the magazines currently supported by the WBC and those with an interest in the subject and issues being discussed. As such, the sample provides an indication of the market for the English-language magazines and the subjects being discussed. The key findings in that respect were:

- Twenty-four per cent (107/445) of respondents were aged over 65 years and 50% were aged over 55. Only 8% of respondents were under 30;
- A considerable proportion of the group were retired (31%) with 42% in employment and 19% being self-employed.

This needs to be taken into account when discussing any marketing or promotional strategy for magazines in the subjects under review.

Figure 1: How interested are you in...? Percentage of respondents who were very interested in the topics in question (percentage)

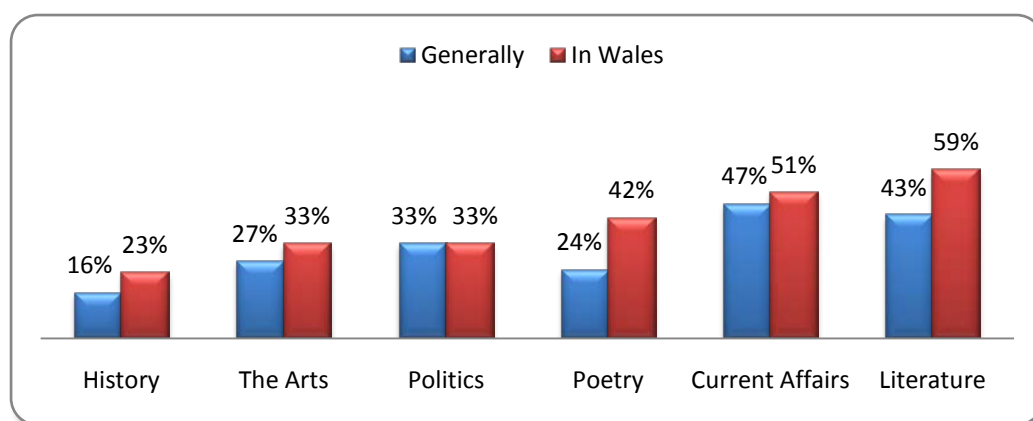


N=445

As shown in figure 1, on average, the sample were most interested in current affairs (53% generally and 55% *in Wales*) and least interested in poetry (39% generally and 38% *in Wales*). A slightly higher proportion of respondents were interested in the subjects in question *in Wales* (e.g. current affairs *in Wales*) rather than generally in all subjects except poetry where there was a slightly higher proportion interested in the subject generally rather than in Wales (39% compared to 38%). Analysis, however, shows that the difference is only statistically significant in the cases of the 'arts in Wales' compared to 'arts in general' and 'history', where respondents are, on average, significantly more interested in Welsh history than in history in general.

The type of magazine (in terms of subject) that most respondents had purchased at any point in the last year related to literature in Wales (59%) and the type that they least purchased related to history in general (16%).

Figure 2: Have you purchased magazines relating to any of these subjects at any point in the last year? The percentage who answered yes

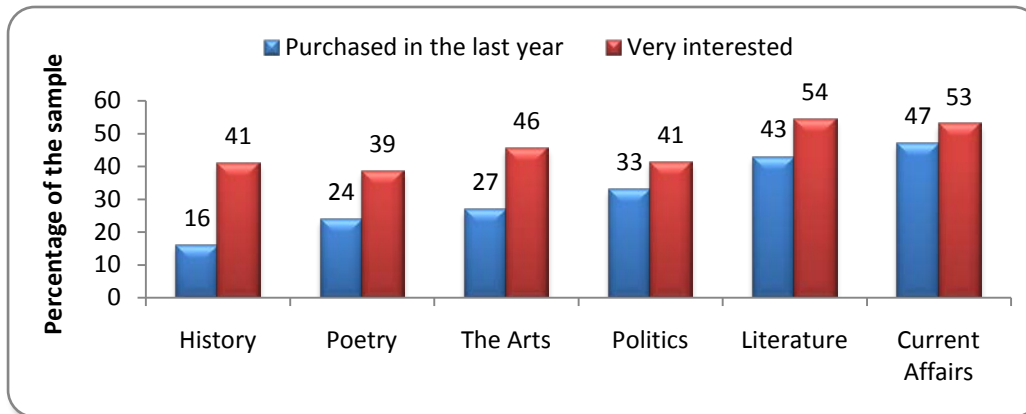


N=445

This, of course, needs to be considered in light of the availability of magazines in those subjects as well as the level of interest in those subjects. Comparing the responses for issues which respondents had an interest in and the types of magazines that they had purchased in the last year shows that the biggest gap is apparent for 'history'; 41% said that they were very interested in history generally but only 16% said that they had purchased a magazine perceived to be about that subject in the last year.

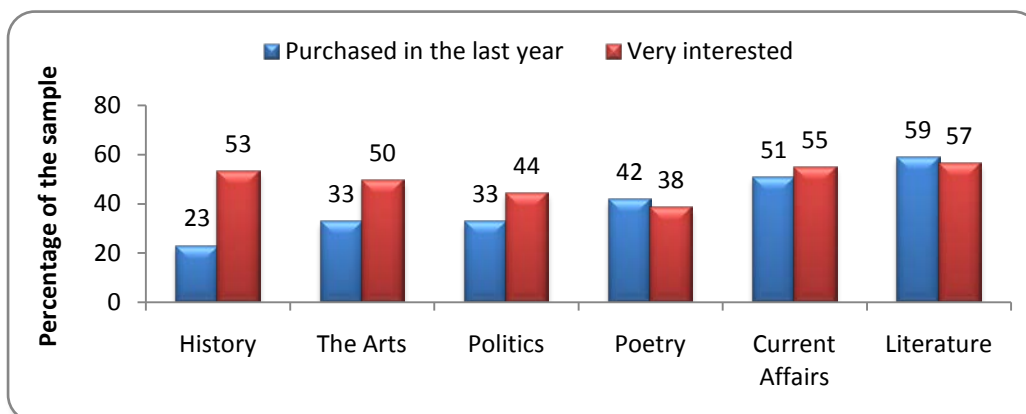
The same pattern is apparent for 'history in Wales' with 53% identifying themselves as being very interested in the subject but only 23% having purchased a relevant magazine in the last year. The gap is smallest for 'literature in Wales', a subject which 57% of respondents said they were very interested in and 59% had purchased a relevant magazine in the last year.

Figure 3(a): the percentage of respondents who said that they had purchased a relevant magazine in the last year compared to the percentage of respondents who said that they were very interested in the subject – GENERAL



N=445

Figure 3(b): the percentage of respondents who said that they had purchased a relevant magazine in the last year compared to the percentage of respondents who said that they were very interested in the subject – IN WALES



N=445

In terms of how regularly they purchase magazines, 62% of the sample could be classified as 'regular purchasers' of magazines buying at least one magazine a month suggesting that there is, generally, a strong demand for magazines within the sample. But, you clearly have to be familiar with a magazine before you can buy it and respondents were most familiar with current affairs magazines generally (61%); also the subject that they were most interested in as noted above. They were least familiar in magazines about the arts in Wales (11%).

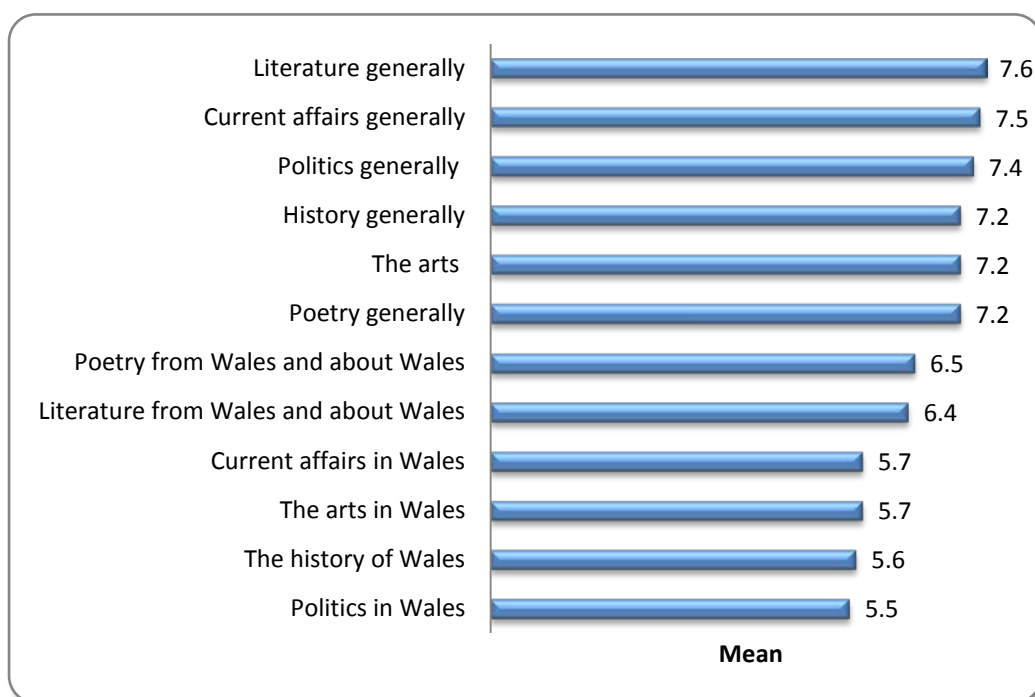
But, do those who are familiar with the magazines read or purchase them? In percentage terms, 'current affairs in Wales' is the category with most regular purchasers / readers (30%) and the arts is the lowest (2%).

One of the obvious ways in which the circulation of magazines can be increased is by converting those who are familiar with a magazine and read it but on an irregular basis into regular purchasers / readers. The analysis shows that the categories with the highest percentage of respondents in those categories is 'history generally' (72%) and 'current affairs generally' (67%). Further analysis found that 76% (339/445) of the sample as a whole fell within the 'target market' for eight magazines considered in greater detail. This suggests that there is a significant amount of overlap within the target market for all eight publications and, hence, the potential for joint or perhaps more significantly cross marketing on their part.

Looking at the current provision of English language magazines in Wales, respondents were most positive about the provision of magazines relating to current affairs generally, giving the provision a score, on average of 7.5 out of 10, and least positive about politics in Wales (4.3 out of 10). They also perceive the provision of magazines about the subjects under consideration generally to be better than the provision of magazines on the same subjects from and about Wales. For example, the provision of magazines about current affairs generally is rated at 7.6 compared to magazines about current affairs in Wales, which is rated at 5.6.

In this respect, the gap is clearly perceived to be in the provision of magazines that are specifically about the subjects *in Wales*; something also identified by the in-depth interviews undertaken in Phase 2. The same pattern is evident when respondents were discussing the quality of English language magazines; magazines about subjects generally are considered to be better than those specifically about the subject in Wales (see figure 4).

Figure 4: Average (mean) score on the quality of English language magazines



N=445

Interestingly, the analysis found that there is a positive relationship between people's perception of the current provision of English language magazines and the quality of the provision; those respondents who score the current provision of English language magazines higher are more likely to rate the quality of provision highly. This suggests that the more aware you are of the magazines available, the more likely you are to rate the provision higher. So, would the perception of the quality of magazines increase if awareness of the magazines that are available increased? The findings of the analysis suggest that it would.

A relatively large proportion of the sample (37%) stated that they believed there was a gap in the current provision of English language magazines in Wales. There was a lot of variance in terms of what that gap was but the most prominent gaps identified were: history (3% - 14/445), current affairs (3% - 14/445) and politics (3% - 12/445). The range of answers to this question is an indication of the very specific things that this group of respondents identified as gaps which makes targeting those gaps difficult.

In terms of websites, a large proportion of our sample had visited websites about current affairs generally (66%) and current affairs in Wales (60%). However, only 30% (135/445) of respondents said they visited websites about poetry generally and 28% (125/445) visited websites on poetry from Wales and about Wales. Interestingly, analysis of the difference between regular and infrequent readers of magazines found that regular readers are more likely to visit websites relating to current affairs generally and in Wales, but that infrequent readers of magazines are more likely to visit websites relating to poetry, the arts and history both generally and in Wales.

Phase 2: Findings of in-depth interviews

The second phase of the research draws on 10 in-depth telephone interviews with respondents to the survey who had agreed to take part in a further study of the subject. Though the need to select the participants could affect the capacity to generalise from results of the second phase, it was necessary in order to target the key readers and therefore review the potential of English magazines published in Wales. Based on the findings of Phase 1, it was decided that the key types of readers to question would fall under the following categories:

- Those who are familiar with the magazines but do not buy them regularly
- Those who have identified a gap in the market
- Those with an interest in the subject but who do not currently buy magazines about those subjects
- Young people
- Digital users

Two from each category were then selected according to their initial responses to the questionnaire.

The interviews found that the points below were relevant to all 10 participants when buying or subscribing to a magazine:

- Design and layout, including a good blend of in-depth and light content, are important to readers of magazines;
- There is a general lack of effective marketing and advertising of English-language magazines;
- There is a deteriorating focus on Wales and relevant Welsh culture within the magazines currently available;
- There is a need for a 'general' magazine specifically for young people;
- There is a need for online and digital tools including blogs, forms of social networking in order to provide a preview of magazines, share ideas amongst readers and so forth; and
- There should be a greater presence at live events, conferences and general research groups.

Though the participants were of varied ages and had very different interests, their views were actually very similar including what they considered as the negative and positive features of English language magazines published in Wales. There was, for example, a general consensus of opinion when discussing the need for a comprehensive, online service as well as the lack of relevance regarding Wales and Welsh culture. Cost however was not an issue for many, with the general opinion being that people were willing to spend if the content was suitable and enjoyable.

From the data collected, it could be argued that magazines do influence and even determine the buying habits of readers, so an increase in readers and subscribers, could result in a general increase in interest in literature in / from Wales as a whole. It is however evident that much needs to change in order to attract and sustain new readers with advertising, accessibility and form being prioritised. Though it is not possible to generalise from the results above due to the nature of the research, it is apparent that many share this opinion, with a need to adapt and modernise becoming a high priority.

1. Introduction

This report sets out the findings of research undertaken by research specialists Wavehill for the Welsh Books Council into the reading habits and preferences of readers of English-language magazines published in Wales.

The report is set out as follows:

- Section 2 sets out the purpose of the research and the methodology that was used;
- Section 3 discusses the findings of the main survey of readers;
- Section 4 considers the findings of the in-depth qualitative interviews undertaken with a small sample of readers as a follow-up to the main survey; and
- Finally, Section 5 sets out the conclusions of the research.

2. Purpose of the research and the methodology

2.1. Introduction

This section provides the context for the remainder of the report by explaining the purpose of the research and the methodology used by the research team.

2.2. Purpose of the research

The Welsh Books Council (hereafter referred to as the WBC) is a national body, funded by the Welsh Government, which provides a focus for the publishing industry in Wales. It provides a number of specialist services (in the fields of editing, design, marketing and distribution) with a view to improving standards of book production and publication in both Welsh and English. It also distributes grants to publishers and actively promotes reading and literacy in Wales.

The WBC currently administers two separate schemes for English-language magazines. The Literary/Cultural Magazines Grant funds magazines of literary and cultural merit that have a strong engagement with Welsh writing in English. The grant is currently shared between the following magazines: Planet, New Welsh Review, Poetry Wales and an eight page literary supplement in Agenda. Grants from this scheme are usually awarded for three years. More modest grants are awarded from the Small Magazines Grant scheme which is allocated on an annual basis and has funded literary magazines such as Envoi, Roundyhouse, Blue Tattoo, Red Poets, Leaf Writers' Magazine, Scintilla and The Raconteur.

At the February 2012 meeting of the Publishing Grants Panel it was agreed that an independent panel should be commissioned to review the provision available to readers of English-language magazines published in Wales. The review will consider the magazines available and recommend a model of funding that will provide the best quality provision for readers in Wales and value for money. Identifying the reading habits and preferences of readers in Wales is a key part of the work to be undertaken. Alongside this review, the WBC commissioned a survey of readers of English language magazines published in Wales, the findings of which are discussed in this report. The findings will help the independent panel undertaking the review to make recommendations to the WBC.

2.3. Methodology

The primary research for this project was undertaken in two phases. The first was a survey of readers. Telephone interviews were subsequently undertaken with a smaller sample of readers to discuss some of the key issues identified by the main survey further and to collect additional qualitative data.

2.3.1. Phase 1: The survey

The questionnaire for the main survey was developed in consultation with the WBC; a copy of the final version can be found in Appendix 1 of this report. The final versions were then posted online at, in English www.magazinesfromwales.co.uk and, in Welsh, www.cylchgronauaesneg.co.uk (see screenshots in Figure 2.1).

The questionnaire was designed to generally take no more than 10 minutes to complete depending of course on how much information the respondent was providing. Alternatively, respondents were invited to book an appointment to complete the questionnaire via a telephone conversation with a researcher (by calling a free-phone number) or by emailing their contact details to email addresses especially set up for this research (magazinesfromwales@wavehill.com or cylchgronauaesneg@wavehill.com). As an incentive, everybody who completed a questionnaire either on-line or by telephone was invited to participate in a prize draw the first prize being £100 of book tokens with four other prizes of £25 of book tokens each.

The survey was targeted at current readers of English language magazines published in Wales and those with an interest in the issues being discussed (i.e. potential readers). Welsh based publishers of English-language magazines were therefore contacted to discuss whether they would assist in the distribution of the questionnaire. A letter and/or email (Appendix 2) was sent to subscribers of the following magazines inviting them to participate in the survey: Agenda (Institute of Welsh Affairs), Planet, New Welsh Review, Poetry Wales and Cambria¹. Planet also published a piece about the survey on their Facebook account.

E-mail contacts were also sourced from Welsh University websites (Aberystwyth, Swansea, Cardiff, Bangor, Trinity St David, Glamorgan and University of Wales). In particular, contacts for staff working within relevant departments were identified; for example, English, Welsh, Creative Writing. Over 200 contacts were generated in this way and an email sent to them all advising of the research with links to the web questionnaire landing page.

As well as the above, contact was made with a list of relevant organisations identified by the WBC. This resulted in:

- The National Library of Wales posting an article on their Facebook page and sending a message to all their followers on Twitter;
- The Hay Festival also did a similar exercise again posting a message on Facebook and sent a Twitter message to all their followers;
- Wales Arts International agreed to add a piece to their newsletter;
- Wales Arts Review also agreed to put a piece in their newsletter; and
- Wales Higher Education Libraries Forum distributed an email to all colleagues in HE libraries in Wales.

¹ Due to data protection rule, letters / emails were either sent to their subscribers directly by the publishers or using 'one-off' envelopes provided by the publishers. One of the unavoidable consequences of this was that some individuals received multiple letters / emails about the survey. They were however only able to complete the questionnaire once.

The following organisations were all contacted by email to ask for their assistance but we are not aware of what action they took:

- The Bevan Foundation
- Welsh Centre for International Affairs
- The Learned Society of Wales
- Women's Arts Association
- Aberystwyth Arts Centre
- Blackwood Miners Institute
- Butetown History and Arts Centre
- Cell B, Blaenau Ffestiniog
- Dylan Thomas Centre, Swansea
- Galeri, Caernarfon
- Norwegian Church Arts Centre, Cardiff
- St Donats Arts Centre, Llantwit Major
- Theatr Mwldan, Cardigan
- Theatr Soar, Merthyr Tydfil
- The Gate, Cardiff
- Torch Theatre, Milford Haven
- Ucheldre Centre, Holyhead
- Wales Millennium Centre, Cardiff
- Independent Ballet Wales
- National Dance Company Wales
- Wales Association for the Performing Arts
- Music Theatre Wales
- Welsh Music Foundation
- Welsh Music Guild
- Welsh National Opera
- National Theatre Wales
- Theatr Genedlaethol Cymru
- The London Welsh Centre
- Steddfota.org
- Meractor

We also utilised a 'snowballing' technique for the distribution of the questionnaire by asking respondents to forward the link to the questionnaire to others who they believed would have an interest in the subjects of the questionnaire.

The survey was 'open' between the 19th September 2012 and the 2nd November 2012 with 445 responses submitted between those dates.

2.3.2. Phase 2: In-depth interviews

Telephone interviews were undertaken with 10 respondents between the 3rd and 11th January 2013. The purpose of these interviews were to follow up and further explore some of the issues that had been identified by an initial analysis of the data collected by the main survey and subsequent discussions with the WBC.

The interviews focused on the following groups of 'readers':

- Those who are familiar with the magazines but do not buy them regularly
- Those who have identified a gap in the market
- Those with an interest in a subject but who don't currently buy magazines about those subjects
- Young people
- Digital users (i.e. tablet devices but also those who read on-line)

Figure 2.1: Screenshots of the 'landing page' for the English and Welsh versions of the online survey

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The questionnaire

About the Welsh Books Council

About Wavehill



Market research: English language magazine published in Wales

The purpose of the research is to collate the views of people who have an interest in literary, cultural and current affairs issues in Wales. In particular, the research is exploring the reading habits of those with such an interest and views on English-language magazines in that field published in Wales. The findings will be used to inform the ongoing activities of the Welsh Books Council including the funding of magazines published in Wales.

The questionnaire should take no more than 10 minutes to fill-in depending of course on how much information you're providing. Alternatively, you can book an appointment to complete the questionnaire via a telephone conversation with one of our researchers by calling 0800 917 5249 (freephone) or by emailing your contact details to magazinesfromwales@wavehill.com or cylchgronauaesneg@wavehill.com.

As a thank you, everybody who completes a questionnaire either on-line or by telephone is entered into a prize draw. The first prize is £100 of book tokens and there will be four other prizes of £25 of book tokens each.

We want to ensure that as many people as possible participate in this research so please feel free to forward a link to this page to any of your colleagues or friends who you believe would be interested in participating.

Please note that this questionnaire is being circulated to gather the opinions of readers of magazines and is separate from the questionnaires circulated by Tony Bianchi amongst those involved in the magazine industry in various capacities.

CLICK HERE TO START THE QUESTIONNAIRE

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Ymchwil i'r Farchnad: cylchgronau Saesneg a gyhoeddir yng Nghymru

Pwrpas yr ymchwil yw casglu barn pobl sydd â diddordeb mewn materion llenyddol, diwylliannol a chyfoes yng Nghymru. Yn benodol, mae'r ymchwil yn ymchwilio i arferion darllen y rheiny sydd â'r diddordebau hyn yn ogystal ag ymchwilio i'w barn ar gylchgronau Saesneg yn y meysydd hyn a gyhoeddir yng Nghymru. Defnyddir canfyddiadau'r ymchwil i roi gwybodaeth i weithgareddau parhaus Cyngor Llyfrau Cymru gan gynnwys ariannu cylchgronau a gyhoeddir yng Nghymru.

Ni ddylai'r holiadur yr hoffem i chi ei lenwi gymryd mwy na 10 munud i chi, yn dibynnu wrth gwrs ar faint o wybodaeth yr ydych am ei rhoi. Neu fel arall gallwch drefnu amser i lenwi'r holiadur drwy sgwrs ffôn ag un o'n hymchwilywyr drwy ffonio 0800 917 5249 (am ddim) neu drwy ebostio eich manylion cysylltu i cylchgronauaesneg@wavehill.com neu magazinesfromwales@wavehill.com.

Fel diolch, bydd enw pawb sy'n llenwi'r holiadur – naill ai ar-lein neu dros y ffôn — yn cael ei roi mewn het. Y wobr gyntaf fydd gwerth £100 o docynnau llyfr ac yna bydd pedair gwobr arall o docynnau llyfr £25 yr un.

Rydym am gael cynifer o bobl â phosibl i gymryd rhan yn yr ymchwil hwn, felly mae croeso i chi anfon link i'r dudalen yma at unrhyw un o'ch cydweithwyr neu ffindiau os credwch y byddai ganddynt ddiddordeb cymryd rhan.

Sylwer bod yr holiadur hwn yn cael ei ddosbarthu i gasglu barn darllenwyr cylchgronau ac mae'n wahanol ac ar wahân i'r holiaduron a ddosbarthwyd gan Tony Bianchi i'r rheiny sy'n ymwneud â'r diwydiant cylchgronau mewn swyddi amrywiol.

Cliciwch yma i gwblhau'r holiadur

3. Phase 1: Findings of the survey

3.1. Introduction

This section sets out the findings of the online / telephone survey introduced in the previous section of the report.

3.2. Who undertook the survey?

In total 445 individuals participated in the survey. Of those:

- 427 were completed online and 13 were telephone interviews;
- Eighty-four per cent (375/445) of the interviews were undertaken in English and 16% (70/445) in Welsh;
- Forty-one per cent of respondents were female and fifty-nine per cent were male (184/445 vs. 261/445); and
- Twenty-four per cent (107/445) of respondents were aged over 65 years and 50% (224/445) were aged over 55. Only 8% (34/445) of respondents were under 30.

Ninety-three percent (412/445), of respondents stated they lived inside the UK, with the majority coming from within Wales (71%; 316/445), and in particular Cardiff (13%; 60/445) and Ceredigion (10%; 46/445). Of the 33 respondents who said they lived outside of the UK, 30% (10/33) said they were from the USA, 12% (4/33) said they were from Australia and a further 12% (4/33) said they lived in France.

Forty-two percent (187/445) of respondents said they were in employment, 31% (136/445) said they were retired and 19% (86/445) said they were self-employed. As shown in Table 1 below, the most common profession amongst respondents was university lecturer.

Table 3.1: The profession of participants in the survey

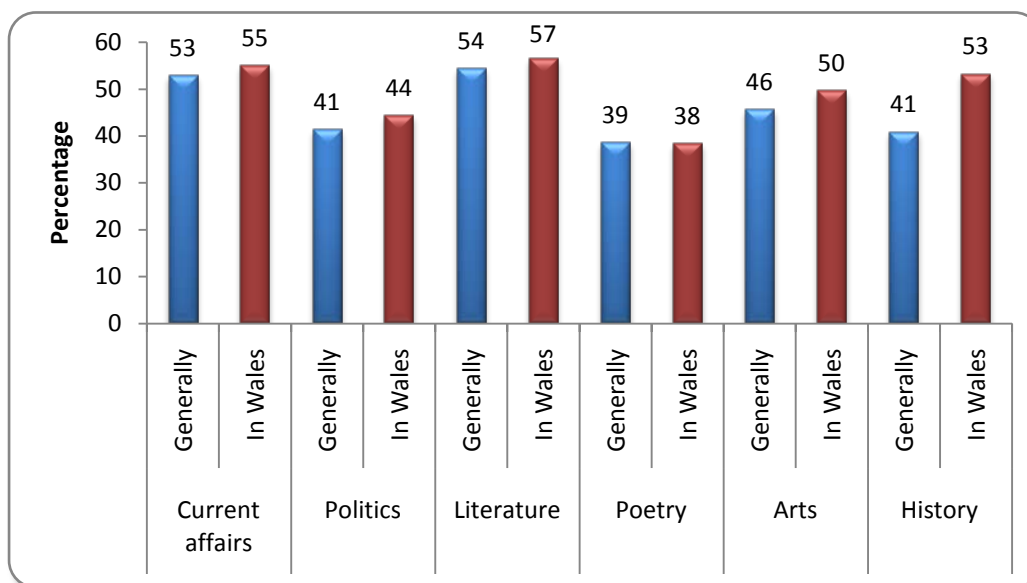
	N	%
University Lecturer	35	12.8
Writer	21	7.7
Teacher	13	4.7
Director	12	4.4
Librarian	11	4.0
Manager	9	3.3
Translator	8	2.9
Artist	7	2.6
Consultant	7	2.6
Local Government Officer	7	2.6
Academic	6	2.2
Editor	6	2.2
Journalist	6	2.2
Administration	5	1.8
Sales Assistant	5	1.8
Business	4	1.5
Civil Servant	4	1.5
Doctor	4	1.5
Engineer	4	1.5
Higher Education	4	1.5
Marketing	4	1.5
Researcher	4	1.5

N=274, Note table only shows >4 responses

3.3. How interested are you in...?

Respondents were asked how interested they were in a variety of issues, both generally and in Wales. This allows for a comparison of relative interest across issues and between Welsh issues and issues in general. As shown in the graph below, on average, the sample had the greatest interest in current affairs and the lowest level of interest in poetry. Looking at the figures for 'in Wales', the highest level of interest was in literature in Wales and the lowest was in poetry in Wales.

Figure 3.1: How interested are you in...? Percentage of respondents who were very interested in the topics in question (percentage)



N=445

The data allows for an examination of whether respondents are particularly interested in issues when they pertain to Wales, as compared to generally. A *paired means test* is used to test the average difference in interest across the sample².

The analysis shows that there is no difference in average levels of interest in current affairs, politics, literature or poetry when they pertain to Wales as compared to interest in these issues more generally. **However, we do find that respondents are significantly more interested in Welsh Arts than Arts in general. The same is the case for History, where respondents are, on average, significantly more interested in Welsh history than in history in general.**

² A test of statistical significance: http://en.wikipedia.org/wiki/Student's_t-test

Table 3.2: Comparison of the level of interest in different subjects in Wales and generally and the statistical significance of the difference.

Subject area	Interest generally	Interest in Wales	Test of difference
Current Affairs	2.4667	2.4022	
Politics	2.1640	2.1798	
Literature	2.3978	2.4157	
Poetry	1.9011	1.9483	
Arts	2.2674	2.3371	***
History	2.1910	2.3551	***

***= $P < 0.01$, **= $P < 0.05$, *= $P < \text{below } 0.1$, 4 point interest scale, ranging from 0 (not interested) to 3 (very interested)

The following is further discussion of the data for the individual subject areas.

3.3.1. Current affairs

When looking at current affairs, it is possible to see that 55% (246/445) of respondents are very interested in current affairs in Wales, compared to 53% (234/445) who said they were very interested in current affairs generally. A paired means test indicates that, on average, the difference in interest across the sample is not significant: respondents are no more or less interested in current affairs in Wales than in current affairs generally.

Table 3.3: How interested are you in Current affairs?

	Current affairs (%)	
	Generally	In Wales
Very interested	53	55
Interested	36	31
Some interest	11	12
No interest whatsoever	0	2

3.3.2. Politics

Forty-four per cent (198/445) of respondents stated that they were very interested in politics in Wales, compared to 41% (184/445) of respondents who said they were very interested in politics generally. A paired means test indicates that, on average, the difference in interest across the sample is again not significant: respondents are no more or less interested in politics in Wales than in politics generally.

Table 3.4: How interested are you in Politics?

	Politics (%)	
	Generally	In Wales
Very interested	41	44
Interested	36	32
Some interest	21	20
No interest whatsoever	2	3

3.3.3. Literature

When asked about literature, 57% (252/445) of respondents stated they were very interested in literature in Wales compared to 54% (242/445) of respondents who said they were very interested in literature in general. A paired means test indicates that, on average, the difference in interest across the sample is again not significant: respondents are no more or less interested in literature in Wales than in literature generally³

Table 3.5: How interested are you in Literature?

	Literature (%)	
	Generally	In Wales
Very interested	54	57
Interested	32	30
Some interest	12	12
No interest whatsoever	1	2

3.3.4. Poetry

Thirty-eight per cent (171/445) of respondents said that they were very interested in poetry from Wales and about Wales similar to the 39% (172/445) of respondents who stated they were very interested in poetry generally. A paired means test indicates that, on average, the difference in interest across the sample is again not significant: respondents are no more or less interested in Welsh poetry than in poetry generally².

Table 3.6: How interested are you in Poetry?

	Poetry (%)	
	Generally	In Wales
Very interested	39	38
Interested	23	29
Some interest	27	22
No interest whatsoever	11	11

³ See Appendix 2

3.3.5. Arts

When looking at the arts it is possible to see that 50% (221/445) of respondents said they were very interested in arts in Wales, compared to 46% (203/445) who said they were very interested in arts generally. A paired means test indicates that, on average, the difference in interest across the sample *is* significant: respondents *are* more interested in the arts in Wales than in the arts generally².

Table 3.7: How interested are you in Arts?

	Arts (%)	
	Generally	In Wales
Very interested	46	50
Interested	38	36
Some interest	15	13
No interest whatsoever	2	2

3.3.6. History

Fifty-three per cent (237/445) of respondents said they were very interested in history in Wales compared to 41% (182/445) of respondents who stated they were very interested in history generally. Again, the paired means test indicates that, on average, the difference in interest across the sample *is* significant: respondents *are* more interested in Welsh history than in history generally⁴.

Table 3.8: How interested are you in History?

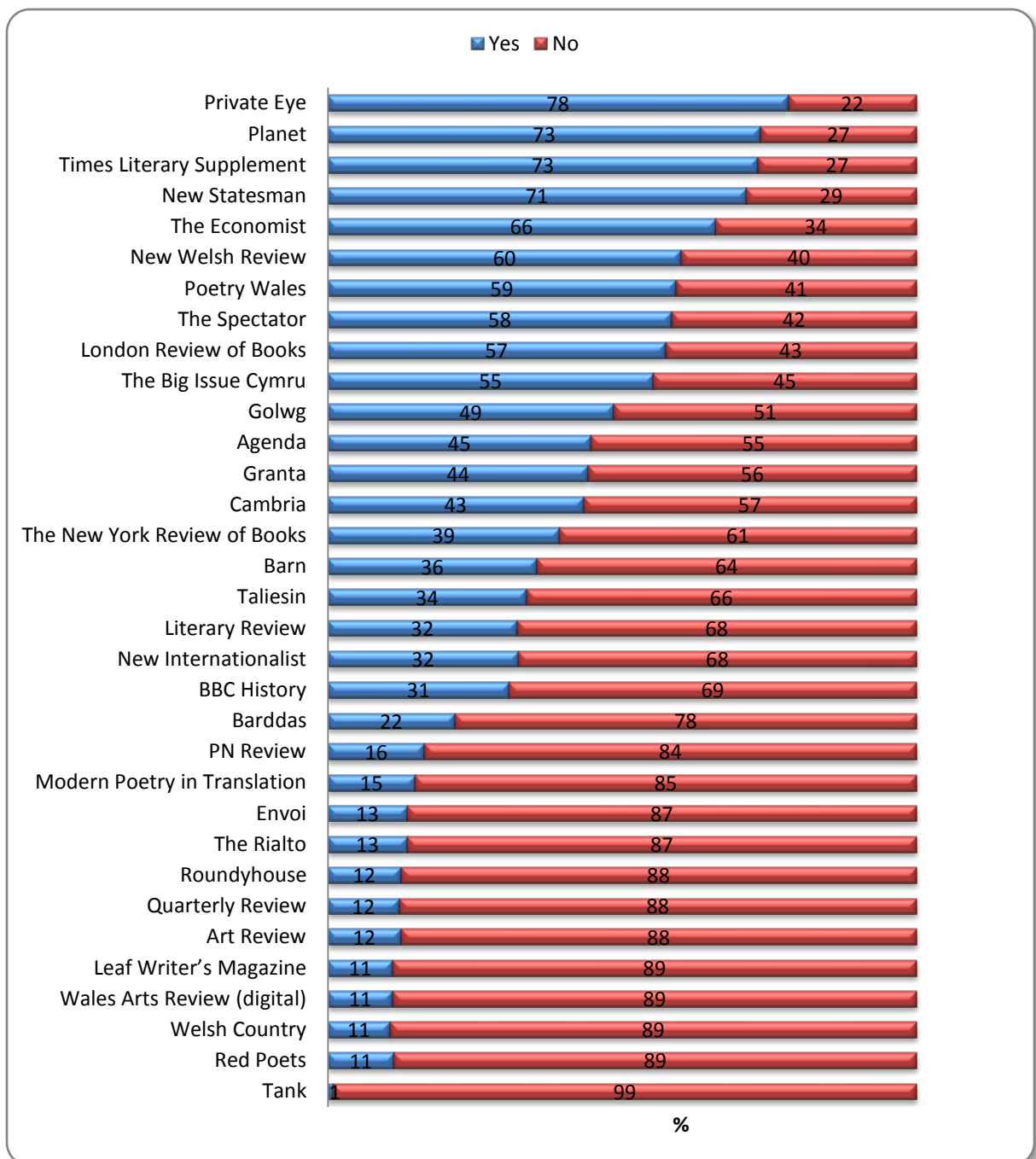
	History (%)	
	Generally	In Wales
Very interested	41	53
Interested	40	31
Some interest	16	13
No interest whatsoever	3	2

⁴ See Appendix 2

3.4. Are you familiar with the following magazines?

Figure 3.2 below shows that the magazine most respondents were familiar with was Private Eye, with 78% (347/445) of respondents stating that they were familiar with that magazine. This is followed by 73% (325/445) who said they had heard of Planet and 73% (324/445) who said they had heard of the Times Literary Supplement. Only 1% of respondents had heard of the magazine Tank (4/445), and only 11% (49/445) of respondents had heard about Red Poets, Welsh Country, Wales Arts Review (digital) and Leaf Writer's Magazine.

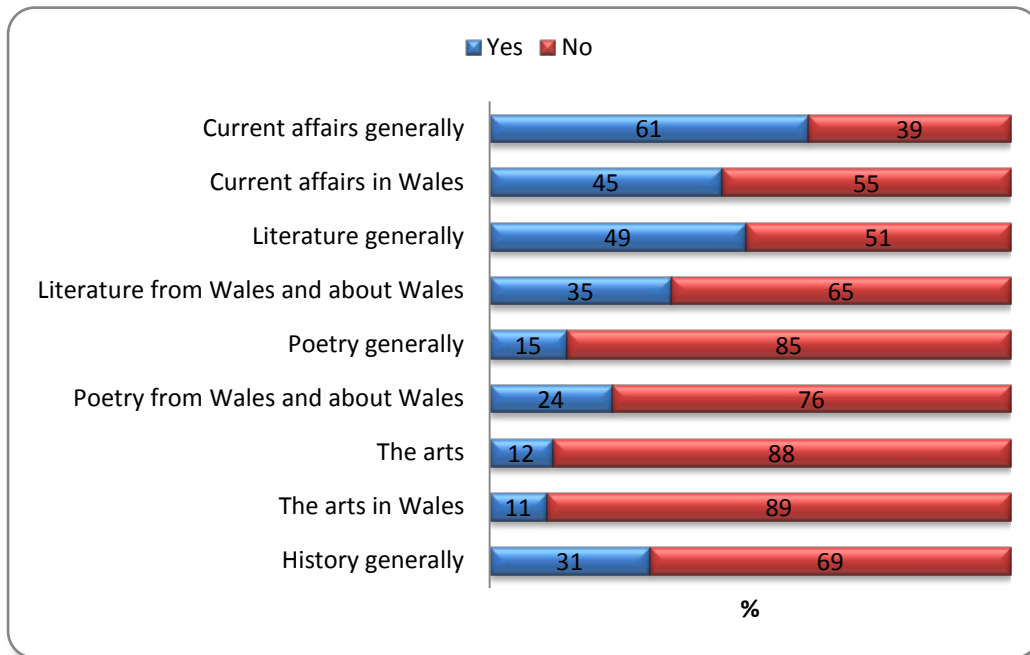
Figure 3.2: Response to the question: Are you familiar with any of the following magazines?



N=445

Figure 3.3 below groups the magazines listed above into the same subjects as previously discussed. As can be seen, respondents were most familiar with magazines in the 'current affairs generally' category and least familiar with magazines in the 'arts in Wales' category.

Figure 3.3: Response to the question: Are you familiar with any of the following magazines? Categorised



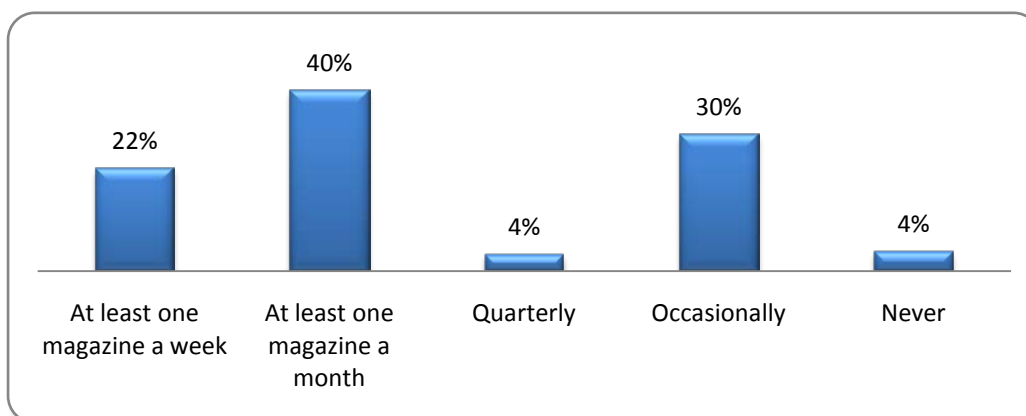
N=445

It should be noted that there is no category for 'history in Wales' as none of the magazines listed were in that category. The categories deemed applicable to each magazine for the purposes of the analysis can be found in Appendix 4.

3.5. How regularly do you purchase magazines?

Figure 3.4 shows that when asked how regularly they purchase magazines about any subject, 40% (176/445) said they bought at least one magazine a month, 30% (133/445) said they bought magazines occasionally and 22% (100/445) of respondents stated they bought at least one magazine a week. The majority of our sample (62%) therefore read magazines on a regular basis.

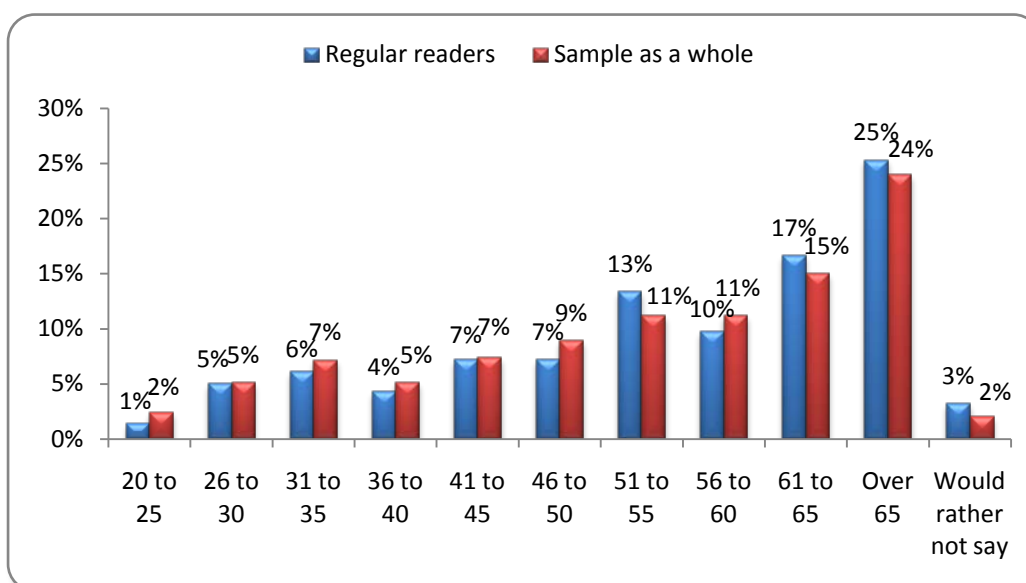
Figure 3.4: Response to the question: How regularly do you purchase magazines?



N=445

The following graph compares the age group of respondents who are 'regular readers' with the sample as a whole. As can be seen, the breakdown of age groups is similar within regular readers as it is for the sample as a whole.

Figure 3.5: Regular readers and the sample as a whole split by age group



N=445 (whole sample)

N=276 (regular readers)

3.6. Which magazines do you purchase and/or read on a regular basis?

This was an open question to which respondents were able to provide any answer; the tag cloud⁵ below illustrates the magazines which were purchased by the respondents of the survey. As shown, Planet, New Welsh Review, Poetry Wales and Golwg were the most commonly cited magazines.

Figure 3.6: Which magazines do you purchase?

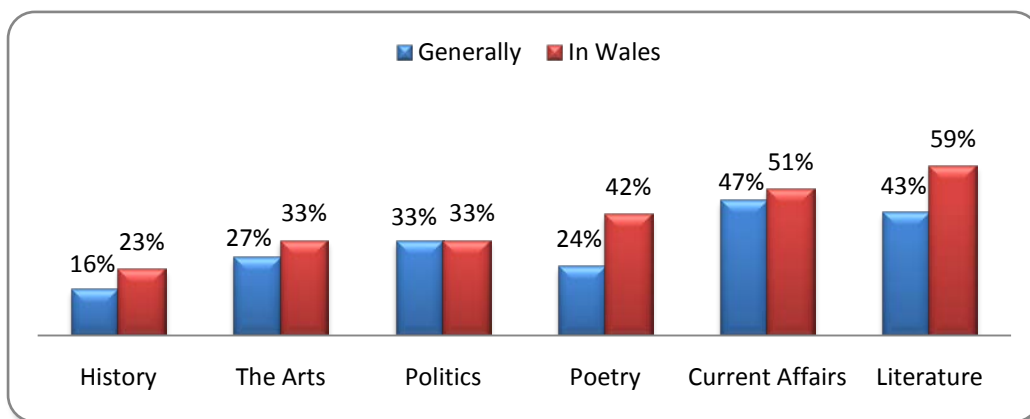


⁵ A tag cloud (word cloud, or weighted list in visual design) is a visual representation for text data. The tag clouds in this report were produced using Tag Crowd software which is available online: <http://tagcrowd.com/>

3.7. Have you purchased magazines relating to any of these subjects at any point last year?

Figure 3.7 illustrates the magazine subject that the respondents stated they read or bought regularly. Magazines on literature in Wales is the most common subject for respondents to state they read or buy regularly, (59%), this is followed by current affairs in Wales (51%).

Figure 3.7: Have you purchased magazines relating to any of these subjects at any point in the last year? The percentage who answered yes

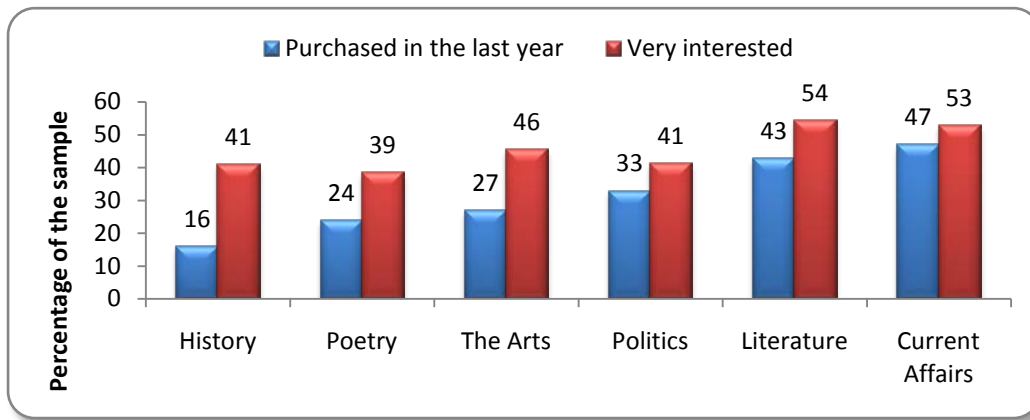


N=445

The graphs that follow compare the percentage of respondents who said that they had purchased a relevant magazine in the last year compared to the percentage of respondents who said that they were very interested in the subject generally (Figure 3.8) and then in Wales (Figure 3.9).

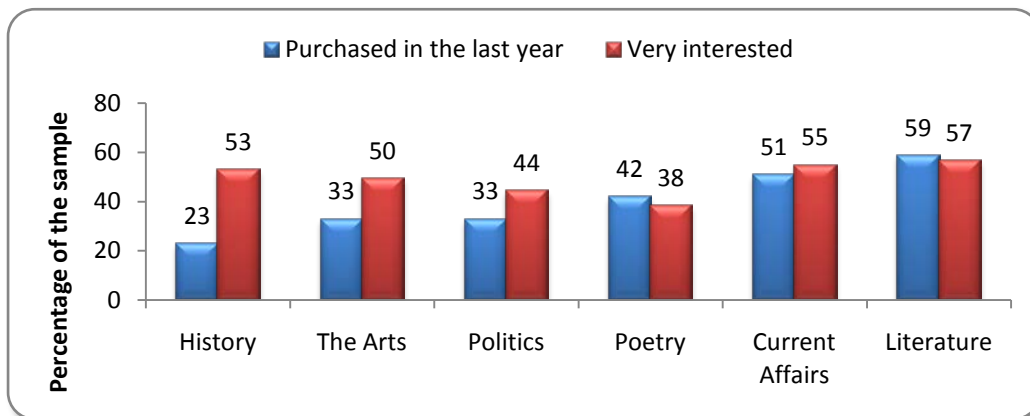
In both instances, the biggest gap is apparent for 'history'; 41% said that they were very interested in history generally but only 16% said that they had purchased a magazine about that subject in the last year. The same pattern is apparent for 'history in Wales' with 53% identifying themselves as being very interested in the subject but only 23% having purchased a relevant magazine in the last year. The gap is smallest for 'literature in Wales', a subject which 57% of respondents said they were very interested in and 59% had purchased a relevant magazine in the last year.

Figure 3.8: The percentage of respondents who said that they had purchased a relevant magazine in the last year compared to the percentage of respondents who said that they were very interested in the subject – GENERAL



N=445

Figure 3.9: The percentage of respondents who said that they had purchased a relevant magazine in the last year compared to the percentage of respondents who said that they were very interested in the subject – IN WALES



N=445

There follows a more in-depth analysis of the data for the individual subjects in question.

3.7.1. Current Affairs

Forty-seven per cent (211/445) of respondents said that in the last year they had bought magazines on current affairs generally compared to 51% (228/445) who said they bought magazines on current affairs in Wales. The tag cloud below illustrates the responses given when individuals were asked to name the magazines they purchased on current affairs generally this year:

Figure 3.10: Magazines purchased in the last year relating to current affairs generally



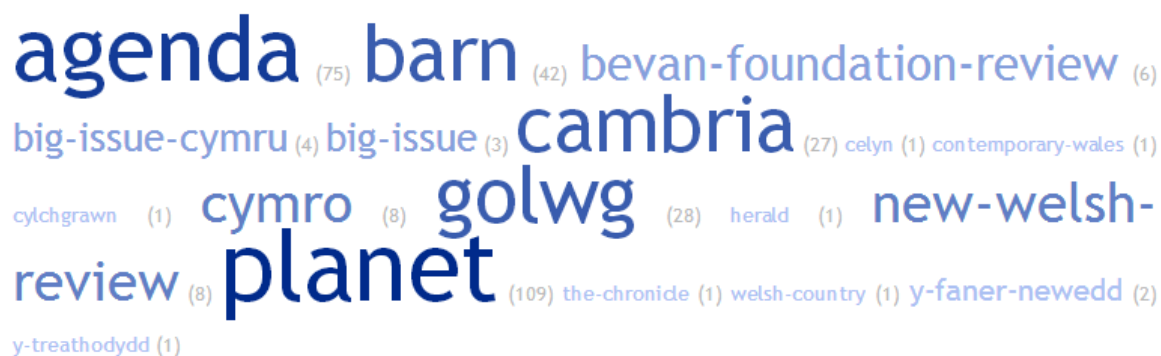
The five most commonly purchased magazines on current affairs generally can be seen in the table below:

Table 3.9: The five most commonly cited magazines purchased relating to current affairs generally

	N	%
The Economist	50	23.7
New Statesman	37	17.5
Planet	31	14.7
Private Eye	25	11.8
The Week	17	8.1

The tag cloud below illustrates the answers given when respondents were asked which publications individuals bought in the last year on current affairs *in Wales*:

Figure 3.11: Magazines purchased in the last year relating to current affairs in Wales



The table below shows that the five most frequently cited magazines were Planet, Agenda, Barn, Golwg and Cambria.

Table 3.10: Most read or purchased magazines on current affairs in Wales

	N	%
Planet	109	47.8
Agenda	75	32.9
Barn	42	18.4
Golwg	28	12.3
Cambria	27	11.8

3.7.2. Politics

Thirty-three per cent (146/445) of respondents stated that they had bought, in the last year, magazines on politics generally, the same percentage (148/445) who state they had bought magazines on politics in Wales in the last year. When looking at what magazines are cited as examples by respondents of magazines on politics generally, the most frequently cited were The New Statesman, Planet, The Economist and Private Eye.

Figure 3.12: Magazines purchased relating to politics in general in the last year



Table 3.11: Top five most frequently cited magazines purchased in the last year on politics in general

	N	%
New Statesman	37	25.3
Planet	31	21.2
Private Eye	22	15.1
The Economist	22	15.1
Spectator	13	8.9

The tag cloud below illustrates the responses given by individuals when asked to cite which magazines they bought in the last year relating to politics in Wales with the five most frequently cited magazines respondents purchased in the last year then noted in the table that follows.

Figure 3.13: Magazines read or purchased relating to politics in Wales



Table 3.12: Top five most frequently cited magazines purchased in the last year that relate to politics in Wales

	N	%
Planet	79	53.4
Agenda	51	34.4
Barn	31	20.9
Cambria	20	13.5
Golwg	19	12.8

3.7.3. Literature

Forty-three per cent (192/445) of respondents stated they bought magazines on literature generally compared to 59% (262/445) who stated they bought magazines about Literature from Wales and about Wales.

Figure 3.14 illustrates the responses cited by individuals when asked what magazines they bought on literature generally in the last year with the top five most frequently cited again noted in the table that follows.

Figure 3.14: Magazines purchased relating to literature in general in the last year



Table 3.13: Top five most frequently cited magazines bought relating to literature generally

	N	%
London Review of Books	43	21.9
Times Literary Supplement	32	16.7
Planet	31	16.1
New Welsh Review	24	12.5
Poetry Wales	18	9.4
Mslexia	18	9.4

Figure 3.15 below and the following table show the answers given by individuals when asked to cite which magazines they had bought in the last year relating to literature from and about Wales.

Figure 3.15: Magazines purchased relating to literature from and about Wales in the last year

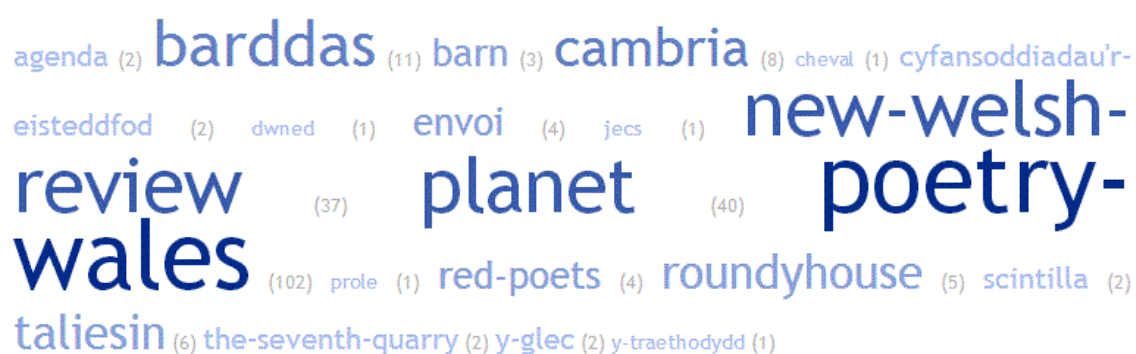


Table 3.14: Top five most frequently cited magazines bought relating to literature in Wales

	N	%
Planet	109	59.6
New Welsh Review	99	54.1
Poetry Wales	59	32.2
Taliesin	21	11.5
Cambria	17	9.3

In contrast, figure 3.17 below shows the magazines cited by respondents when asked to list which magazines on poetry from and about Wales they had purchased in the last year.

Figure 3.17: Magazines purchased relating to poetry from and about Wales



The table below shows the five most frequently cited magazines given when respondents were asked what magazines they had bought in the last year relating to poetry in Wales.

Table 3.16: Top five most frequently cited magazines bought in the last year relating to poetry in Wales.

	N	%
Poetry Wales	102	55.1
Planet	40	21.6
New Welsh Review	37	20.0
Barddas	11	5.9
Cambria	8	4.3

3.7.5. The Arts

Twenty-seven per cent (118/445) of respondents said they regularly bought magazines about the arts in general, compared to 33% (146/445) of respondents who said they regularly bought magazines about the arts in Wales.

The tag cloud below illustrates the responses given when individuals were asked to state which magazines they had bought in the last year relating to the arts generally.

Figure 3.18: Magazines purchased in the last year relating to the arts generally



The table below shows the top seven most frequently cited responses given when respondents were asked to cite which magazines they had bought in the last year relating to the arts generally.

Table 3.17: Top seven magazines listed by respondents when asked what magazines they purchased in the last year relating to the arts generally:

	N	%
Planet	30	25.4
New Welsh Review	12	10.2
London Review of Books	6	5.1
Art Monthly	5	4.2
Barn	5	4.2
Craft	5	4.2
Poetry Wales	5	4.2

Figure 3.19 shows the responses given when respondents were asked what magazines they had bought in the last year on the arts in Wales. The table below shows the top five responses.

Figure 3.19: Magazines purchased in the last year relating to the arts in Wales



Table 3.18: Top five magazines listed by respondents when asked what magazines they purchased in the last year relating to the arts in Wales

	N	%
Planet	86	58.9
New Welsh Review	39	26.7
Barn	17	11.6
Cambria	16	11.0
Poetry Wales	11	7.5

3.7.6. History

Only sixteen per cent (73/445) of respondents said that they bought or read magazines on history generally on a regular basis, compared to 23% (102/445) of respondents who said they regularly bought or read magazines on the history of Wales.

The tag cloud below shows which magazines were stated by respondents when asked to say which magazines they purchased in the last year.

Figure 3.20: Magazines purchased in the last year relating to history generally



The top five responses given can be seen in table 3.19 below:

Table 3.19: Top five magazines listed by respondents when asked what magazines they purchased in the last year relating to history generally

	N	%
History Today	17	23.3
BBC History	14	19.2
Planet	14	19.2
Archaeology	6	8.2
Barn	4	5.5

The magazines listed when respondents were asked which magazines they bought relating to the history of Wales can be seen in the tag cloud below:

Figure 3.21: Magazines purchased in the last year relating to history generally



The table below shows the five most frequently cited magazines.

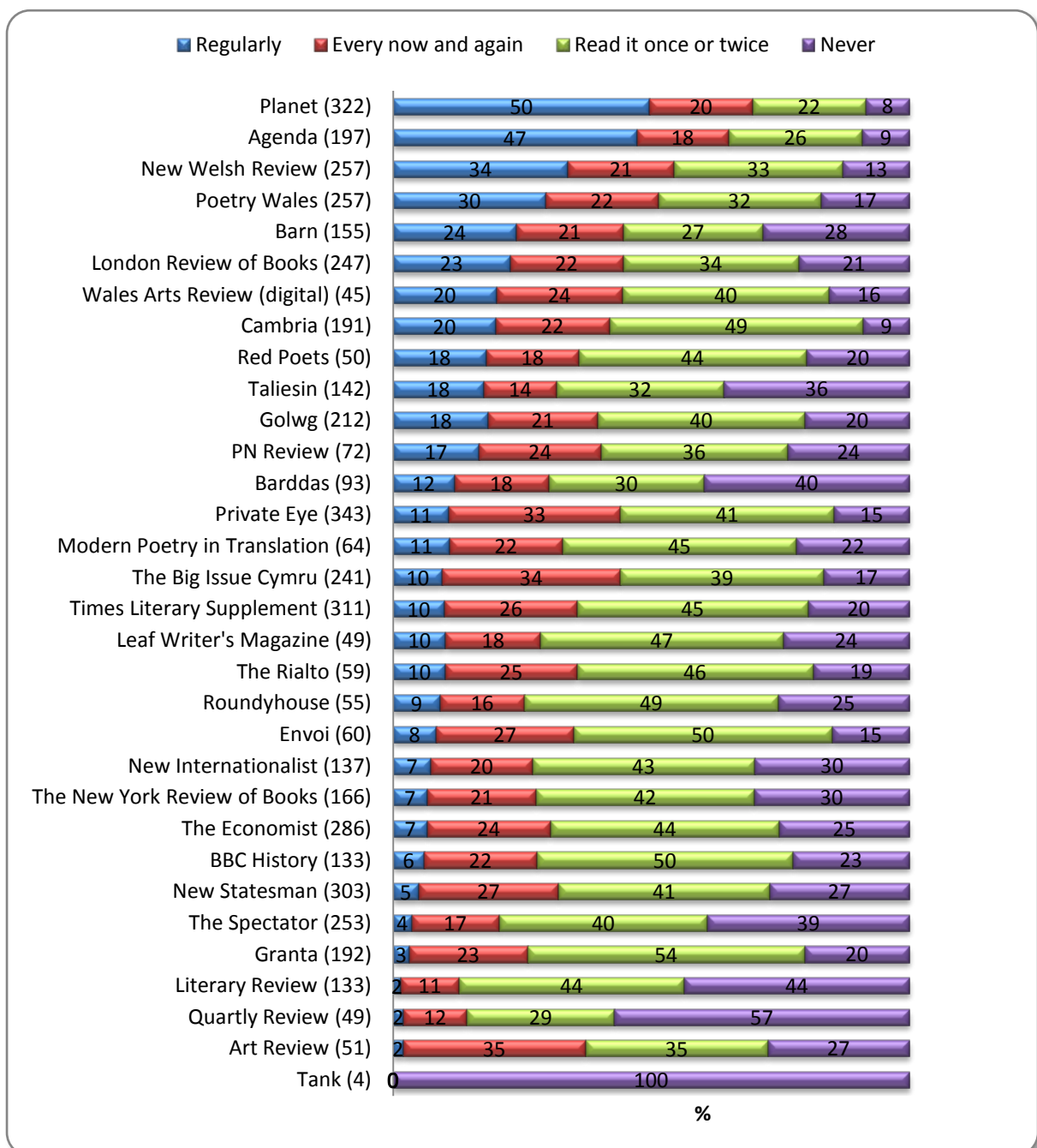
Table 3.20 Top five magazines listed by respondents when asked what magazines they purchased in the last year relating to the history of Wales

	N	%
Planet	33	32.4
Cambria	17	16.7
Welsh History Review	12	11.8
Llafur	11	10.8
Barn	8	7.8

3.8. How often do you buy or read the following magazines?

For the magazines they were familiar with (please refer to Section 3.4), respondents were asked how often they read or bought those magazines. In the figure below, the number of respondents who were familiar with the magazine is shown in brackets after the name of the magazine in question. The graphic then illustrates how regularly those had read / purchased the magazine in question.

Figure 3.22: Response to the question - How often do you read or purchase the following magazines? (note – this question was only asked to respondents who were familiar with the magazines in question)

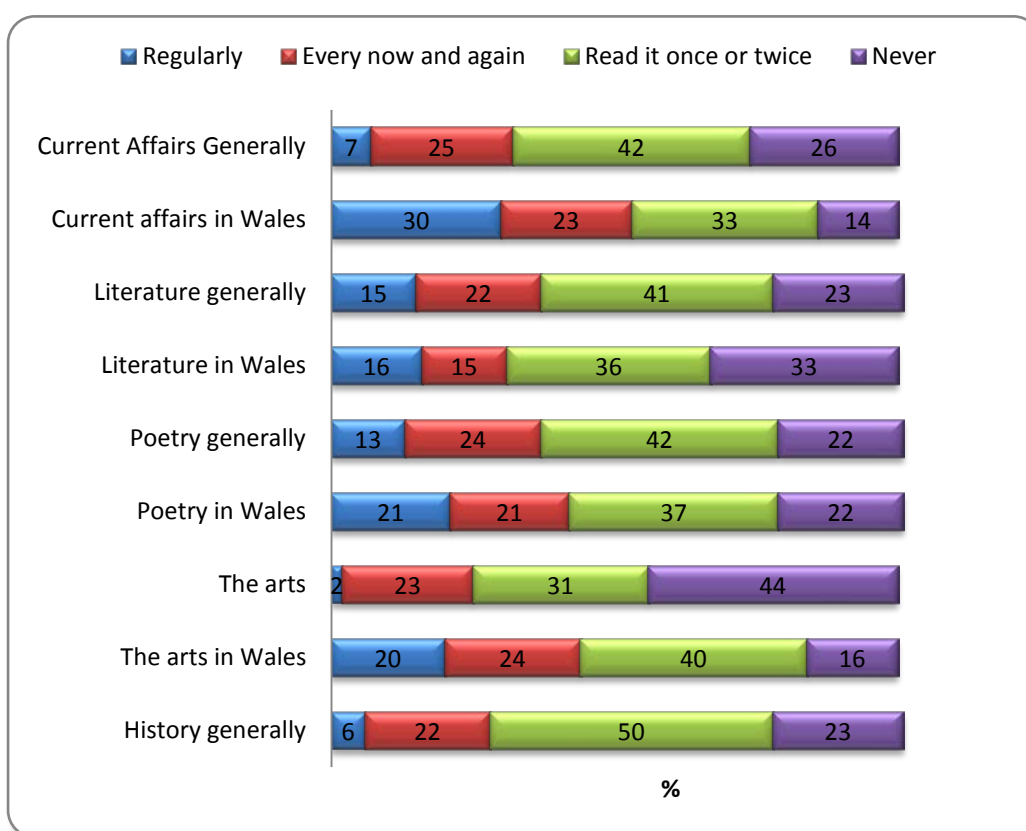


N=between 4 and 343 (Sample size – 445)

Figure 3.22 shows that the magazines which are read / purchased most often are Planet and Agenda. Fifty per cent (160/322) of respondents say they read or have bought Planet and 47% (93/197) of respondents said they bought Agenda regularly. All four of the respondents who had heard of the magazine Tank had not read it.

The following graph again groups the magazines together into their subject categories. It shows that, in percentage terms, 'current affairs in Wales' is the category with most regular readers (30%) and the arts is the lowest (2%). The categories with the highest percentage of 'every now and again' and 'once or twice' readers is 'history generally' (72%) followed by 'current affairs generally' (67%).

Figure 3.23: Response to the question - How often do you read or purchase the following magazines? Categorised (note – this question was only asked to respondents who were familiar with the magazines in question)



3.8.1. Characteristics of the ‘target market’

One of the obvious ways in which the circulation of magazines can increase is by converting those who are familiar with a magazine and read it but on an irregular basis into regular readers; this would conceivably be easier in the short to medium term than persuading those who never read a magazine to become readers.

Figures 3.22 and 3.23 can be used to identify that ‘target market’ for the magazines and categories of magazines in question; i.e. those respondents who were aware of the magazine but only read them ‘every now and again’ or ‘once or twice’ (i.e. the red and green portions of the columns).

We looked at the characteristics of this ‘target market’ for a cross-section of eight of the magazines:

- Agenda
- Barddas
- Barn
- Cambria
- Envoi
- Poetry Wales
- New Welsh Review
- Planet

The analysis found that 76% (339/445) of the sample as a whole, fall within the ‘target market’ for these eight magazines. This suggest that there is a significant amount of overlap within the target market for all eight publications and, hence, the potential for joint marketing on their part. Further:

- 42% (143/339) of the target market identified were female, and 58% (196/339) were male;
- 38% (126/332) were aged over 60, 55% (181/332) were aged between 30 and 60 years leaving just 8% (25/332) who were 30 years old or younger; and
- 40% (137/339) of respondents stated they were in employment with a further 22% (73/339) saying they were self-employed.

Twenty-three per cent (78/339) of respondents in the target market purchase a magazine of some kind at least once a week, 40% (136/339) purchase a magazine at least once a month. Twenty nine per cent (99/339) say they buy a magazine occasionally, 4% (13/339) quarterly and 4% (12/339) say they never buy magazines.

Twenty-three per cent (78/339) of respondents in the target market purchase a magazine of some kind at least once a week, 40% (136/339) purchase a magazine at least once a month; 63% were therefore regular purchasers of magazines. Unsurprisingly given the proportion within this sub-sample, this is largely consistent with the characteristics of the sample as a whole. However, it is further evidence that an effective way to promote readership to the target market is via the other publications.

An analysis of the ‘target market’ for the eight individual magazines can be found in Appendix 3.

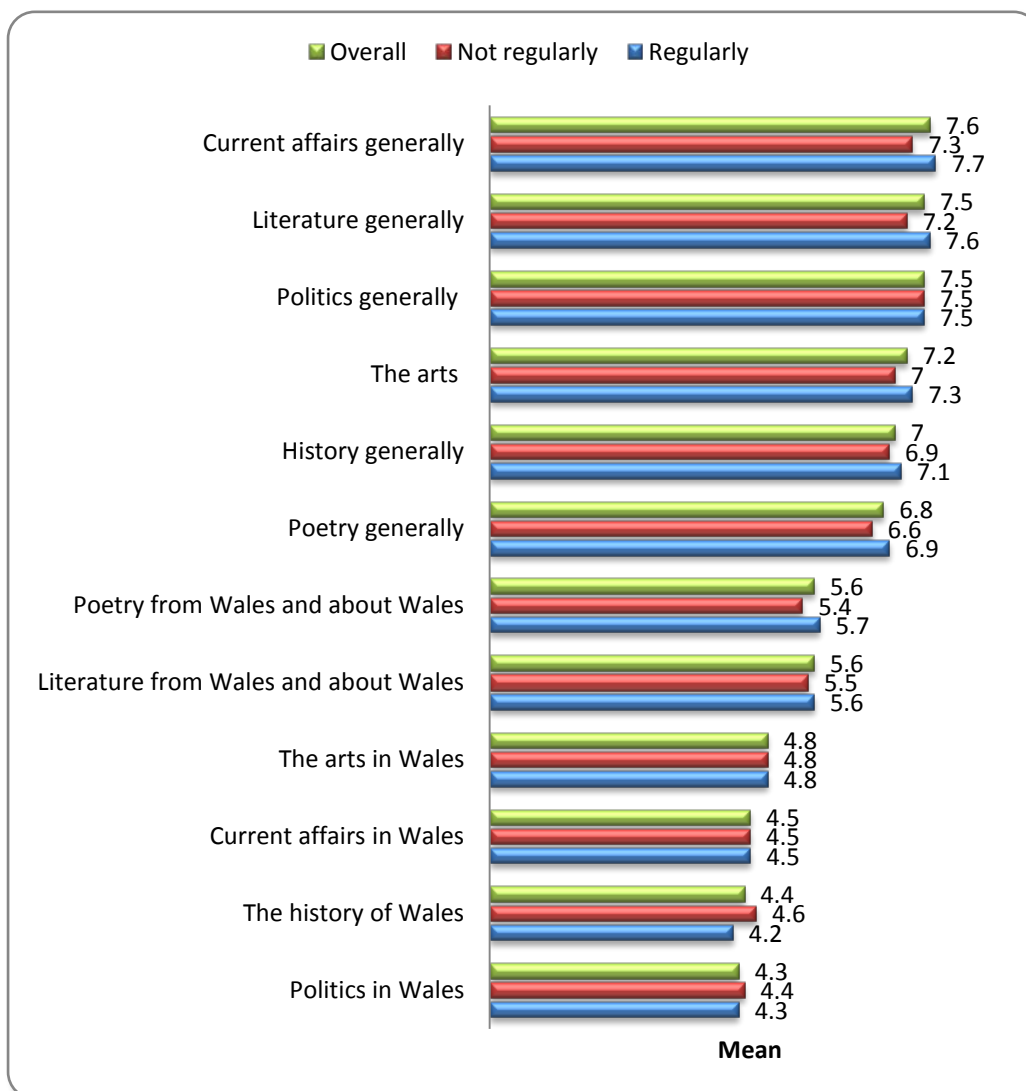
3.9. Current provision of English Language magazines

The survey looked at both the current provision of English language magazines, and then to rate the quality of this provision. We then looked to see if there was a relationship between the scores.

3.9.1. Rate the current provision of English language magazines

Individuals completing the questionnaire were asked to rate on a scale of 0-10 (0 = no magazines available and 10 = plenty of magazines available) how they perceived the current provision (i.e. availability) for English language magazines in a number of subject areas. Figure 3.24 shows that the respondents perceive the current provision for magazines generally higher than magazines on or about Wales. The graph also shows that there is not a major difference in opinion between those who are regular readers of magazines and those who are not.

Figure 3.24: Mean score on the current provision of English language magazines by how often respondents buy magazines

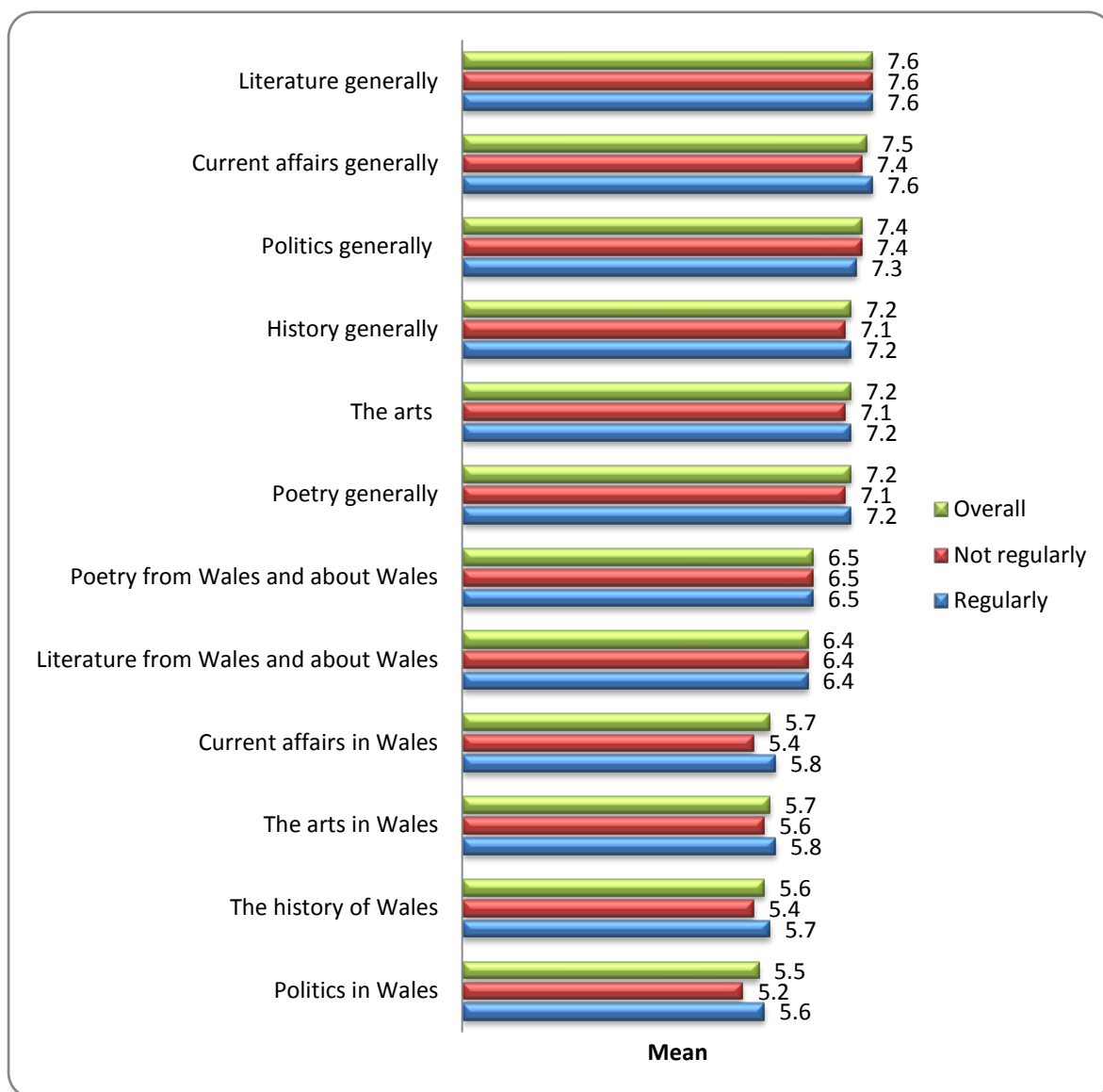


N=445

3.9.2. Rate the quality of the current provision of English language magazines

Respondents were then asked to rate the quality of English language magazines on a scale of 0-10 (0 = very poor and 10 = very good). Figure 3.25 below illustrates that respondents perceived the quality of English language magazines generally to be higher than those on or about Wales.

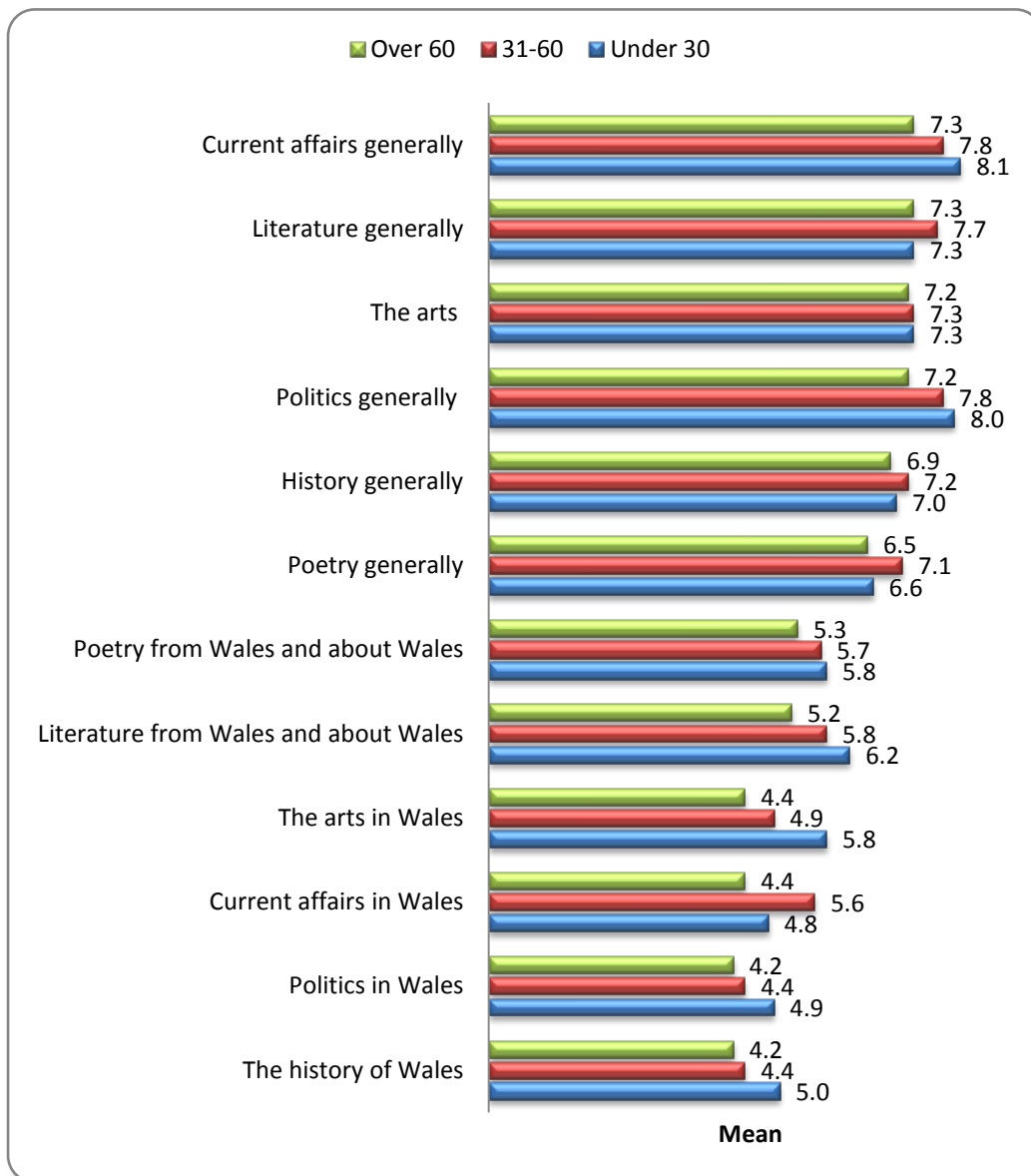
Figure 3.25: Mean score on the quality of English language magazines by how often respondents buy magazines



N=445

It is interesting to divide the mean score by age. For the purpose of this study, the variable for age was broken into 3 categories; under 30, 31-60, and over 60. Figure 3.26 below illustrates how the mean score given for the current provision of English language magazines decreases with age in eight of the 12 cases; younger respondents perceive the provision of magazines to be better than their older counterparts do.

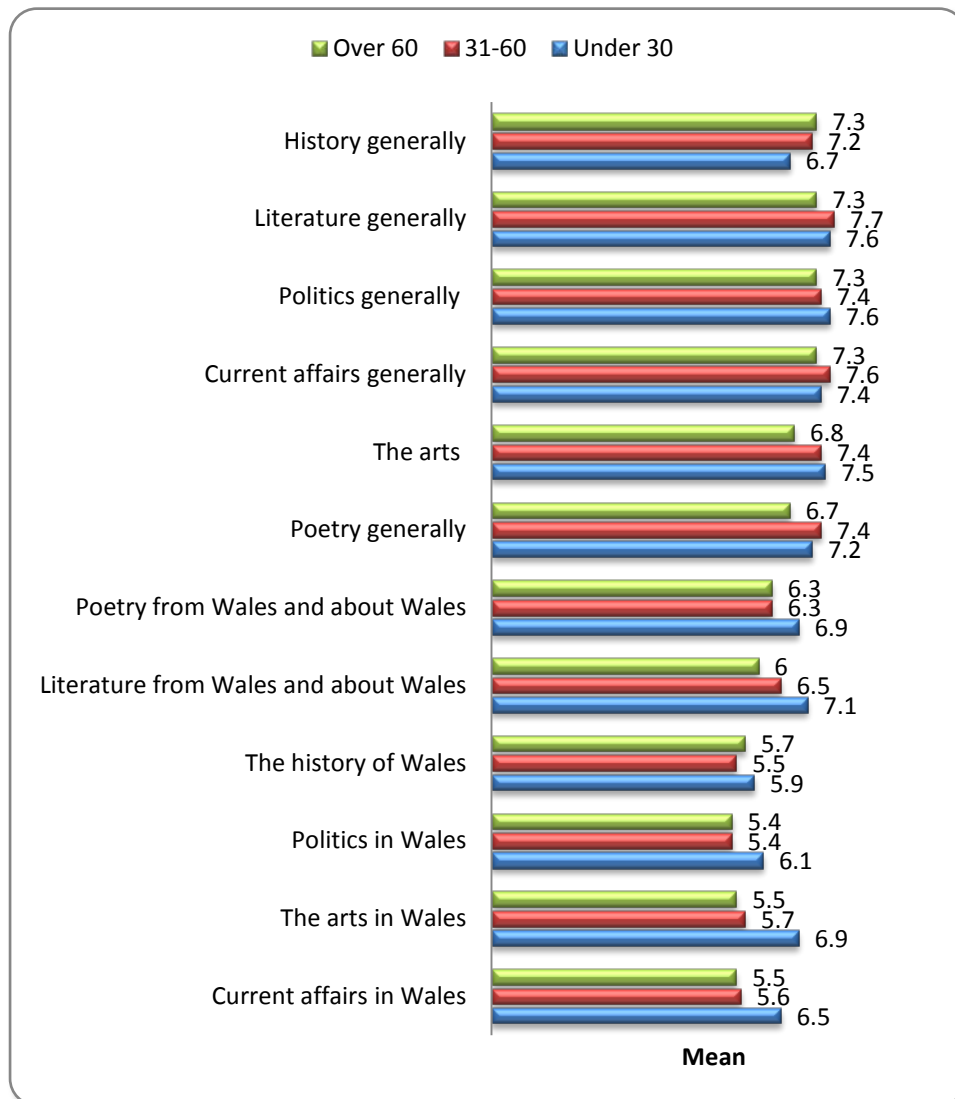
Figure 3.26: Mean score on the current provision of English language magazines by age



N=445

Those respondents in the age group under 30 also give higher scores when rating the *quality* of English language magazines than older age groups. The only case where this is inverted is for history generally, where the age group over 60 give a higher score than the 31-60 age group and the under 30 group.

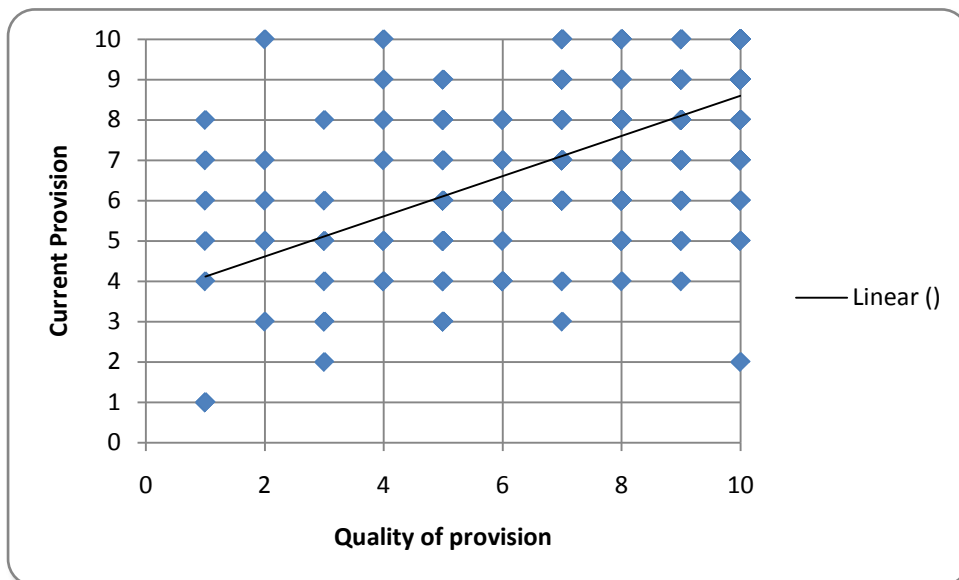
Figure 3.27: Mean score on the quality of English language magazines by age



N=445

As figure 3.28 illustrates, there is a positive relationship between people's perception of the current provision of English language magazines and the quality of the provision. Those respondents who score the current provision of English language magazines higher are more likely to also rate the quality of provision as higher also.

Figure 3.28: Scatter plot showing the relationship between perceived current provision and quality of provision



N=445

3.10. Are there any gaps in provision?

In total, 37% (166/445) of respondents stated there was a gap in the current provision of English language magazines. Table 3.21 shows the coded responses given, and it is possible to see that 8% of respondents stated there was a gap in the provision of magazines on history (14/166), 8% said a gap in the provision of magazines on current affairs (14/166), and 7% said there was a gap in the provision of magazines on politics (12/166).

It is important to note that this question was open-ended; no options or indications of possible gaps in the market were provided. As table 3.21 shows, many people interpreted “*current gaps in provision*” differently; for example, some interpreted it as asking what topics there are not enough magazines on and others answered as if it was asking about the way in which the information is covered.

Table 3.21: Are there any gaps in the current provision of English-language magazines which you would like to see addressed?

	N	%
History	14	8.4
Current affairs	14	8.4
Politics	12	7.2
Too narrow focus	10	6.0
Arts	9	5.4
Online versions	8	4.8
Visual arts	7	4.2
Not wide enough availability	7	4.2
Bridging between academic and general readership	5	3.0
Too academic	5	3.0
Short stories and fiction	5	3.0

N=166. Note, only responses >5 shown

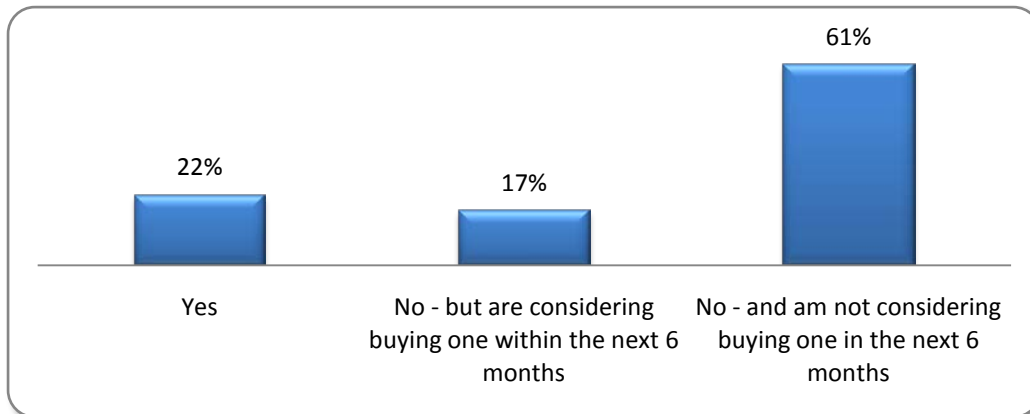
Of the 166 respondents who said there was a gap in provision, 67% (111/166) were male, and 33% (55/166) were female. Twenty-seven per cent (43/162) of respondents were over the age of 65, and only 16% (26/166) were under the age of 40. Thirty-four per cent (55/162) of respondents were retired and 37% (60/162) were in employment. Sixty-five per cent (108/166) of those individuals who stated that there was a gap in provision said they bought magazines at least once a month.

3.11. Tablet computers

3.11.1. Do you own a tablet computer (for example an iPad)?

Figure 3.29 illustrates that the largest group are the people who do not currently have a tablet computer and who are not considering buying one in the next six months.

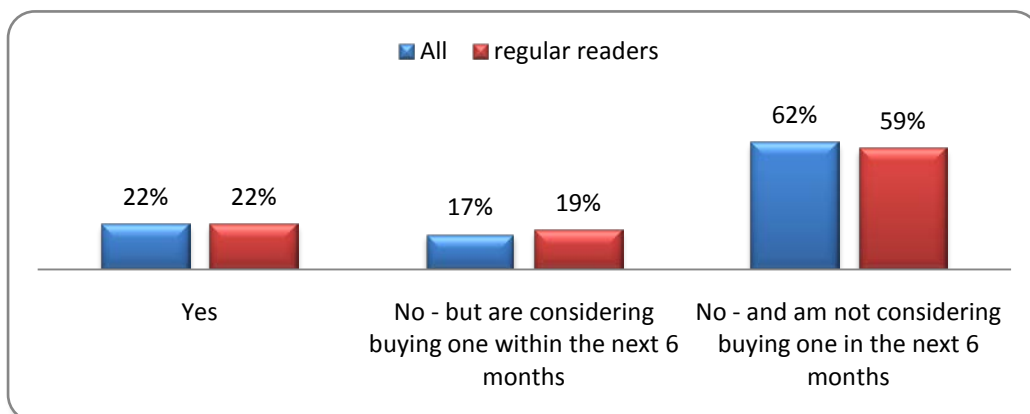
Figure 3.29: Response to the question: Do you own a tablet computer?



N=445

This data was explored in more detail to look at whether people who stated they bought magazines regularly (at least once a month) were more likely to own a tablet computer. As the figure below shows, there is no noteworthy differences between those people who buy magazines regularly and the respondents overall.

Figure 3.30: Response to the question: Do you own a tablet computer? Comparison of regular reader and the sample as a whole

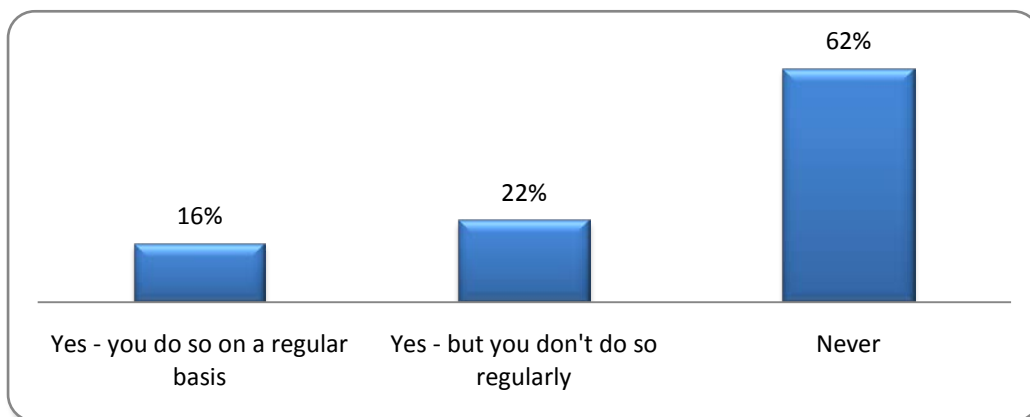


N=276 regular readers, 445 overall

3.11.2. Have you ever purchased a tablet computer version of any of the magazines?

Those respondents who reported owning a tablet computer were subsequently asked whether they had ever purchased a tablet computer version of any magazines. As figure 3.31 illustrates, 16% said they had done so and that they do so on a regular basis (15/96), 22% said they had but not regularly (21/96) and 63% said they never had (60/96). This could therefore conceivably be an area for development in the future.

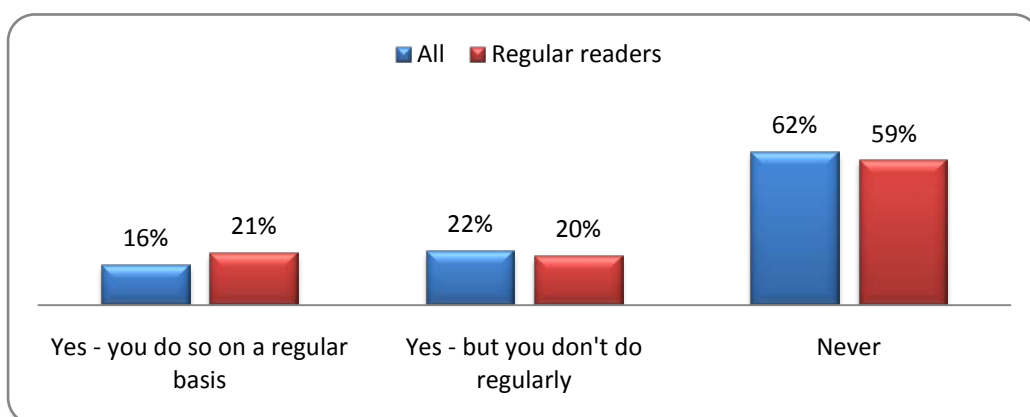
Figure 3.31: Response to the question – (for those who own a tablet) Have you ever purchased a tablet computer version of any of the magazines?



N=96

As figure 3.22 below shows, those respondents who stated they were regular readers of magazines are slightly more likely to purchase a tablet computer version of magazines.

Figure 3.22: Response to the question - Have you ever purchased a tablet computer version of any of the magazines?

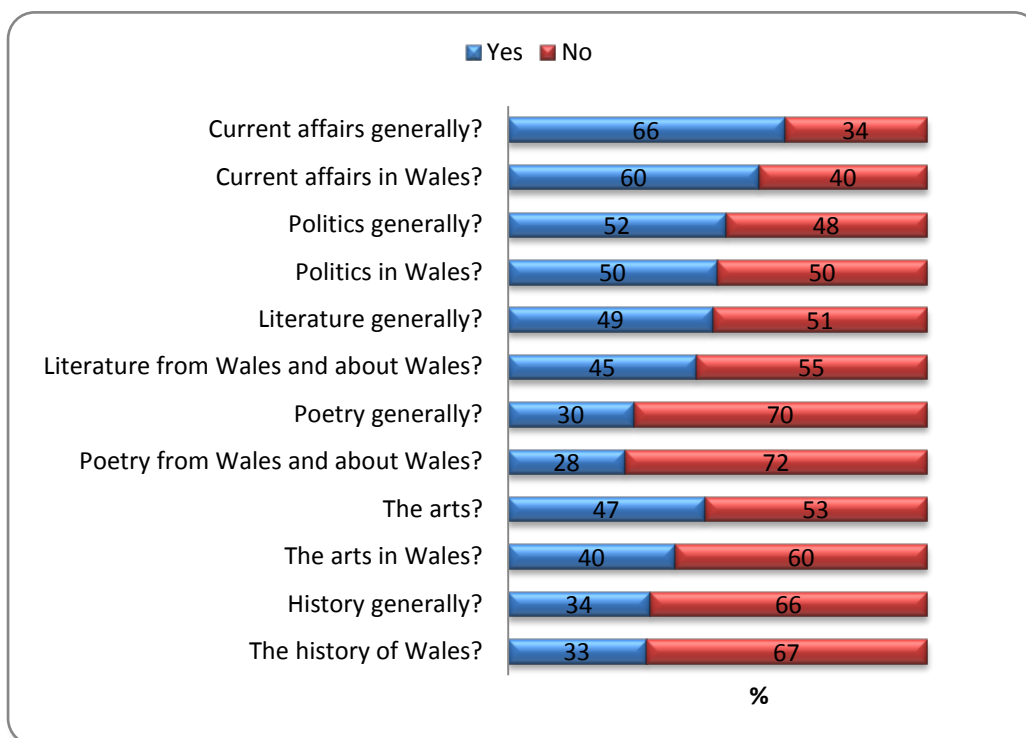


N=61 regular readers, 96 overall

3.12. Websites

Respondents were asked what websites they visited and, as figure 3.23 shows 66% (295/445) stated they visited websites about current affairs generally and 60% (265/445) of respondents said they visited websites about current affairs in Wales. Only 30% (135/445) of respondents said they visited websites about poetry generally and 28% (125/445) visited websites on poetry from Wales and about Wales.

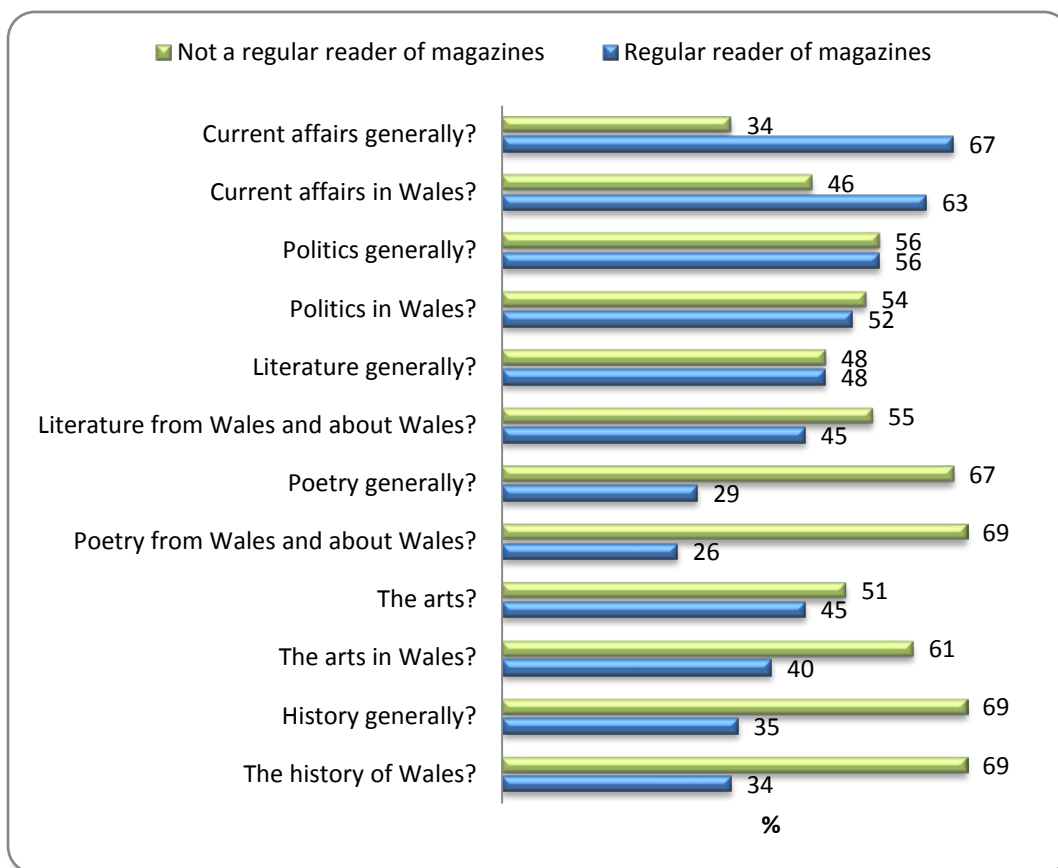
Figure 3.23: Response to the question - Do you visit websites relating to the following subjects?



N=445

Figure 3.24 compares the responses of those who are regular readers of the magazines and those who are not. It shows that regular readers of magazines are more likely to visit websites relating to current affairs generally and in Wales, but that non-regular readers of magazines are more likely to visit websites relating to poetry, the arts and history both generally and in Wales.

Figure 3.24: The percentage of respondents who visited websites split according to regular readers and non-regular readers



N=445

The table on the following page compares the data for the websites visited with that for the level of interest shown by respondents to the subjects explored by the survey. It shows that there is a positive relationship between an interest in a subject and visiting a relevant website.

Table 3.22: The level of interest of participants in subjects vs whether they have visited websites relating to those subjects

All figures are percentages					
How interested are you in:		Generally Do you visit websites relating to:		Wales Do you visit websites relating to:	
		No	Yes	No	Yes
Current Affairs	Very interested	41.3	58.3	32.8	70.6
	Interested	39.3	33.9	42.2	23.8
	Some interest	19.3	7.5	21.7	5.3
	No interest	0.0	0.3	3.3	0.4
Politics	Very interested	23.7	57.8	22.0	67.1
	Interested	34.0	37.4	38.1	26.1
	Some interest	38.1	4.8	34.5	5.9
	No interest	4.2	0.0	5.4	0.9
Literature	Very interested	32.7	76.7	37.8	79.9
	Interested	43.4	21.0	41.5	15.6
	Some interest	21.7	1.8	18.3	4.0
	No interest	2.2	0.5	2.4	0.5
Poetry	Very interested	19.4	83.0	23.4	76.8
	Interested	27.4	14.1	32.2	20.0
	Some interest	38.7	1.5	30.0	1.6
	No interest	14.5	1.5	14.4	1.6
Arts	Very interested	30	63.5	36.6	69.5
	Interested	42.2	32.2	42.2	26.6
	Some interest	24.5	3.8	19.0	3.4
	No interest	3.4	0.5	2.0	0.6
History	Very interested	29.7	63.1	41.3	77.6
	Interested	43.9	32.2	36.9	19.7
	Some interest	22.6	4.0	18.5	2.7
	No interest	3.7	0.7	3.4	0.0

N=445

3.13. Membership of any groups, clubs or associations

Thirty-one per cent of respondents are members of a group, club or association (139/445), and 69% were not (306/445). The five most frequently cited groups, clubs or associations mentioned can be seen in table 10 below.

Table 3.23: Are you a member groups, clubs or associations?

	N	%
Institute of Welsh Affairs	28	20.1
Poetry Society	13	9.4
Association for Welsh Writing in English	9	6.5
CADW	6	4.3
National Trust	6	4.3

N=139

4. Phase 2: findings of in-depth interviews

4.1. Introduction

The second phase of the research draws on 10 in-depth telephone interviews with respondents to the survey discussed in the previous section who had agreed to take part in further study of the subject. Though the need to select the participants could affect the capacity to generalise from results of the second phase, it was necessary in order to target the key readers and therefore review the potential of English magazines published in Wales.

Based on the findings of phase 1, it was decided that the key types of readers to question would fall under the following categories:

- Those who are familiar with the magazine but do not buy them regularly
- Those who have identified a gap in the market
- Those with an interest in the subject but who do not currently buy magazines about those subjects
- Young people
- Digital Users

Two from each category were then selected according to their initial responses to the questionnaire, and questioned further, with a relatively equal number of males and females. Each participant was asked the same questions according to a basic interview guide, but they were also free to explore other subjects if they wished. Four issues were explored:

- Why are fewer people buying magazines?
- What would make them buy magazines?
- Where are they accessing information instead?
- How can magazines attract new readers?

The findings of the interviews are discussed below.

4.2. Group 1: Those who are familiar with the magazines but do not buy them regularly

Table 4.1: Group 1 participants

Participant	Age	Sex	Location	Employment Status
1	36-40	Male	South Glamorgan	Employed
2	Over 65	Female	Flintshire	Retired

To begin the interview, each participant was asked to explain what they expected from a quality magazine and what content they would generally like to see. The answers varied according to their subjects of interest, but both participants in this instance expected good, attractive design, accessibility (easy to purchase) and a good variety of articles and interest on their chosen subject. Both were very irregular readers of Poetry Wales and the New Welsh Review, though they both wrote poetry, they did not subscribe to the magazines.

It was then asked, what would encourage them to buy or subscribe to the magazines of interest, taking into account the balance of articles, price and format, including a printed and digital version. Both answers varied, perhaps as a result of age and general free time. For example, participant 1 was employed full time but spent his free time writing, reading and visiting literary festivals. He recognised that there was a need for a comprehensive magazine that was available online and a printed version also which would suit the majority of readers. He emphasised that a need for a digital approach was based on a number of factors including the ability to advertise through social media sites as well as a blog/chat room that would allow readers to share poetry and literary experiences, marketing it as an effective method of communicating with other magazine subscribers, authors and contributors. A printable version would also be needed in order to sustain a wider audience and those who preferred a hard copy. It could be argued that this could be emulated with all magazines. In regards to the content, participant 1 argued that there was a need for a good mixture of both in depth articles and shorter lighter pieces, again to satisfy all types of reader. It was also argued that a greater emphasis was needed on the roots of English language Welsh poetry, as he felt there was a lack of good material that concentrated on Wales as a whole and celebrating literature from Wales generally, without alienating English readers. Participant 1 was not born in Wales, and did not consider himself truly Welsh, but saw a greater need to advertise English language Welsh literature and “make it global somehow”. He argued that the use of social media would aid this.

Participant 2, however did not particularly think that a digital version of the magazine would change her readiness to subscribe, but agreed that for many it would. Participant 2 was retired and spent her free time in a writing group and library club. Though she enjoyed Poetry Wales, she bought it primarily to enter competitions and share poetry, which she felt she could get from her local poetry group. She did however note that an online preview of the next issue would perhaps attract her to buy the magazine next month were there a subject of interest for her. Accessibility to the magazine she expressed was sometimes difficult and there was a general lack of retailers in her local area that sold the magazine. This did not make it more attractive to subscribe however as she felt there was a need to see the content before buying. Therefore, an emphasis was put on local accessibility. The above subjects were important when deciding whether to subscribe or not to certain magazines.

The interview then progressed to how the readers were first introduced to the magazines and what appealed and did not appeal to them. Both participants were introduced through their interest in writing poetry and sharing their experiences of writing and reading different pieces. It was generally agreed that they were encouraged to read Welsh Poetry through word of mouth and frequenting courses that promoted the magazine. The wish also to enter competitions and compare poetry was also a great advantage. Participant 1 noted that he had felt a need to find a magazine that was both Welsh but also connected with his love of writing, after moving to Wales eight years ago. He became familiar with Poetry Wales and became an infrequent consumer, but did not investigate other magazines. This was partly due to lack of accessibility without subscribing and a need for a more 'portable' version that would satisfy and fit in with his work. What they had read however did affect their general buying habits and had encouraged them to buy books from other English language Welsh poets, but once again infrequently according to their lack of subscription to any major magazine.

Participant 2 agreed that she had become more aware of initiatives like the Cinnamon Press and Seren books, prompting her to buy more regularly. Cost was not an issue for either participant. They both agreed that were something of great interest then cost would not affect their buying habits. It appeared that accessibility and lack of information and advertising, in their opinion was their main reasons for not buying or subscribing generally.

Regarding Wales and Welsh culture (which became an apparent theme when discussing the magazines) both participants said that they would prefer a greater emphasis on Wales and Welsh culture generally. Even though Poetry Wales did deliver accordingly, they felt that recent issues had begun to stray from what they believed its content should be. It must be noted that both participants had moved to Wales within the last 20 years and they largely wanted to discover what made English language Welsh poetry unique and what connected them to other poets. Participant 1 expressed that though such an interest may be seen as a 'niche' market, it makes the subject more interesting and more appealing to the reader. Participant 2 called for a more localised approach to the way magazines are targeted. For example, she felt that because it is a specialized subject, that a more local focus on local groups would enhance its buying potential. Though their opinions differed, they agreed that the magazines should make the most of their Welsh roots.

The need for an increase in potential readers was an interesting subject for both participants. For example, participant 1 had previously noted a need for a digital blog, chat room or social networking site that would interest a variety of audiences, including himself and participant 2 had also agreed. Beyond this however, participant 2 expressed that she would like a sample of magazines that would suit her group's interest. Their purpose would be to encourage the group to buy or subscribe to the magazine and should not be given as 'freebies', but as a way of trying to enhance reader and purchase numbers. Once again there was a preview element to her comments which suggested that some would like a 'see before you buy,' option.

In order to conclude this group, the key points are that a printed and digital version of the magazine is important to different readers. There appears to be a lack of advertising generally which does not encourage/ attract those who are familiar with the magazine but do not buy them regularly, to do so. There is also a suggestion that there is a need for a fresh approach in order to enhance readers experience and a digital preview or taster magazines would be useful for this group.

4.3. Group 2: Those who have identified a gap in the market

Table 4.2: Group 2 participants

Participant	Age	Sex	Location	Employment Status
3	46-50	Female	Cardiff	Employed
4	Over 65	Male	Cardiff	Retired

Both the participants in this group subscribed to one or more magazines funded by the WBC, they both agreed that there was a gap in the market and that changes needed to be made in order to satisfy current reader trends. When asked, what they as readers would like to see in the magazines, there was an element of personal preference as in Group 1, but it was felt generally that a more holistic approach to English language current affairs in Wales that covers both politics and policy and which blends with cultural content, including book reviews. Though participant 4 argued that the magazine Planet had offered and achieved this for many years, he felt its standard was deteriorating and that it:

“...has become less interesting than it used to be as it now fails to connect writing and the situation in Wales as it once did.”

Participant 4 had every copy ever printed of the magazine, so felt he was justified in his opinion. Participant 3 also noted that, as a reader, she would prefer a more rounded approach to Welsh politics as she felt a lack of expertise on the subject as well as suitable discussion. Neither wanted more specialised subjects generally, but rather a magazine that offered more about Wales in all its forms.

Regarding what encourages them to buy or subscribe to their magazines; design, content and clear topics were of great importance including greater emphasis on advertising the magazine and its preferred subject. Participant 3 argued that many of the English magazines published in Wales had become too *“bitty”* and did not offer what they once did. Once again, it was agreed that a mixture of online and printed versions of magazines would be useful, but that neither should be ignored. Participant 3 argued that both have their place and both are important to different readers. Similar to participant 1, participant 4 argued that there was a need for an online outlet for opinion and new debate and those magazines like Planet and New Welsh Review could provide a basis for this through the use of blogging or social media.

Participant 4 believed that Planet and New Welsh Review had *“lost their way,”* and that they were not *“plugged into”* what is happening in Wales. More time and funding is needed for new research and that the magazines should visit more conferences and research groups in order to become aware of the varied public opinion. He also argued that both design and content have deteriorated in Planet, and it *“no longer feels as though it has its finger on the pulse of Welsh affairs and beyond.”* This, he said, could discourage buyers and there is a gap in the market for Planet to succeed in a different form. Design and content were obviously very important to both participants and would affect their decision to buy or subscribe, including a lack of relevance and a clear public service. Participant 4 also argued that bad editorial decisions and *“no obvious strong editorial hand,”* also discourage him from buying a magazine.

Both participants were introduced to the magazines through work and their interest in politics and Welsh affairs. Both had been readers almost from the beginning of Planet and New Welsh Review. The challenge seemed to be, not in the introduction of the magazines themselves, but rather in keeping its readers interested. Though price would become an issue if they felt that the magazines were expensive, they did agree that their choices were not expensive. However, participant 4 did argue that it was *“habit,”* rather than the enjoyment that ensured his subscription. Participant 3 argued that prices are usually higher than magazines like The Spectator and New Statesman, but she acknowledged that this would not be feasible in Wales. It was agreed though that often this meant that the publishers tried to save money on marketing in order to keep costs down and that this perhaps was becoming an issue for many of the magazines in question.

Regarding their general reading habits, both agreed that reading general reviews did prompt them to buy the books or writings in general. It had however prompted them to consider online journals as well as online versions of their chosen magazines and had made them think about online initiatives especially. This tied in with their opinions on the focus on Wales and Welsh culture, where participant 4 especially felt there needed to be a digital initiative that would enhance the magazines kudos and therefore its popularity and diversity. Participant 3 argued that not enough is being written about Wales and that the dearth of resources and media generally do not concentrate enough on it. This, they both agreed, would encourage more readers and would satisfy a need that they felt had not been achieved.

In conclusion, it was evident that many of the points expressed in Group 1, were also true of Group 2, where participants felt there was a greater need for online resources as well as a general change within the magazines themselves. Once again, it was felt that a fresh approach was needed as well as a greater diversity, though the subject matter differed.

4.4. Group 3: Those with an interest in the subjects but who do not currently buy magazines about those subjects

Table 4.3: Group 3 Participants

Participant	Age	Sex	Location	Employment Status
5	Over 65	Female	Conwy	Retired
6	56-60	Male	Rhondda Cynon Taf	Retired

The participants in Group 3 were different to the other two groups as they had varied interests. Participant 5 had a keen interest in literature and literature from / about Wales in particular and participant 6 an interest in politics, the environment, architecture and art. They were also subscribers to a magazine each, but did not subscribe to others which may have been suitable. For example, participant 5 was a subscriber to Golwg, but was not aware of the New Welsh Review, Poetry Wales, Planet and so forth. Participant 6 was a subscriber to Planet only and was, in general very positive about the magazine though did not feel he would subscribe to any others. He did however express that Planet appeared to have experienced some changes in the last year, of which he did not approve, but hoped that it was now beginning to stabilise after editorial changes.

As in both the other groups, design and marketing features were elements that these readers wanted from a magazine with participant 6 in particular noting that he likes to experience specialised Welsh history, current affairs from a Welsh perspective (which he feels has been lacking recently in Planet) short stories and visual culture. Participant 5 noted that in her youth she had taken a 'lively' interest in politics, but had recently changed to a mixture of topical issues, gossip, art and the theatre. She felt that Golwg was a very attractive choice due to its light articles and varied subject matter. When asked what form they would like their magazines to take, both agreed that they preferred the printed version, but as in Group 1 and 2, there was a consensus that there was a need for a general digital or online version that would attract a further audience. It would not however be used by them.

When asked why they did not subscribe to other magazines, both agreed that cost was an issue, with Participant 6 expressing that he already felt a brand loyalty towards Planet and had carried on subscribing, even though he was not always pleased, and did not feel he could subscribe to another magazine. Participant 5 said that she often shared her magazines amongst friends and therefore felt no need to buy or subscribe to any more.

Both participants however had very different introductions to the magazines. Participant 5 evidently enjoyed reading Golwg after learning Welsh and had also started to write some articles because of it. It became apparent however that participant 6 had almost been a 'life subscriber' and had found Planet to have deteriorated somewhat. But, both had started buying as a result of word of mouth. Similarly to groups 1 and 2, they found the cost of both magazines reasonable, but had decided not to subscribe to others as a result. They did however often buy books or visit places that were reviewed by both Planet and Golwg, so it did affect their buying habits to some extent, though did not encourage them to subscribe further. Though very positive in their opinion, they did suggest introducing a few changes to English magazines published in Wales, some that perhaps encourage them to subscribe or at least to satisfy a need that was not fully being met. As quoted by participant 6:

"Planet still gets Arts Council support, it has to give more in my opinion, and has to be more thought provoking, but has to be young enough but still satisfy foggies beyond regular journalism."

Participant 5 had a similar view, adding that these magazines should advertise at more promotional and public events. Some are more prominent than others, including Golwg, and that is the reason why she has decided to subscribe. There was also a consensus when discussing Wales and Welsh culture, with both participants feeling there needed to be greater emphasis on the variety of literature, events, art, politics and popular culture in Wales.

In conclusion, it appeared that both participants, though subscribers to other magazines, would not be buying further as a result of cost but also of a lack of variety between magazines. The need for change was also emulated by this group, securing it as a reoccurring theme within the interviews.

4.5. Group 4: Young People

Table 4.4: Group 4 Participants

Participant	Age	Sex	Location	Employment Status
7	20-25	Female	Conwy	Employed
8	26-30	Male	Cardiff	Employed

Some would argue that young people should be a key target for publishers when considering marketing and advertising strategies. The number of young people who took part in the survey undertaken during phase 1 was very low and when questioned on their buying habits, their response was not generally positive or indeed of general enthusiasm. When questioned on their expectations from a magazine, their responses were similar to that above for example design, attractiveness, a varied approach to the subject with a mixture of hard hitting, but also light subject matter. Both felt that these were missing from most English language magazines published in Wales. Both participants had read and enjoyed many articles in Poetry Wales, Cambria, Planet and The New Welsh Review but neither would be willing to subscribe or regularly buy any of the magazines. This was partly due to some articles being labelled as 'dry' and of no interest to young people. Participant 7 for example, felt that there were no comprehensive reviews of fiction, events or activities directed towards young people. She did however note that some articles had been of interest. Participant 8 noted that he felt there was a lack of design and quality in many of the magazines and this had become off putting.

Both agreed that there was a need for a comprehensive online magazine that combined an informal approach to article writing as well as an interest in young people and their interests as a whole. They felt that this was certainly lacking within the Welsh media, and agreed that there was not a fair representation of young people within Welsh culture. Participant 7 suggested that advertising and marketing on social networking sites would be an effective way of establishing interest and an audience as well as gaining momentum for a more 'user friendly' magazine for young people. It would also be a medium in which to express themselves freely, on a more impersonal level. Participant 7 said that she liked the 'clutter free' option that a digital version could provide.

It appeared that buying habits of magazines, newspapers and books in general was rather sporadic, so it was suggested that a digital version would be suitable. Cost was also an issue, with both participants noting that they would not subscribe yearly as a result of finance but that being able to buy online was becoming the norm. As a result it could be argued that the need for an online magazine, combining a variety of subjects, specifically geared towards young people would generate a large amount of interest. It would also provide a discussion board that would keep articles and publications current and relevant.

To conclude, many of the points mentioned above do not differ from that of group 1, 2 and 3. But, a general lack of interest in magazines in general was much more apparent.

4.6. Group 5: Digital Users

Table 4.5: Group 5 Participants

Participant	Age	Sex	Location	Employment Status
9	61-65	Male	Cardiff	Retired
10	51-55	Female	Rhondda Cynon Taff	Employed

What became evident during the last set of interviews was an apparent consensus with the other groups but with greater emphasis on online and digital tools that would attract a larger audience as well as new and refreshing subject matter. Both participants were regular readers of online and printed versions of magazines, and both were very familiar with English published magazines in Wales. Participant 9 argued that a “*sense of duty*” only was ensuring his ongoing subscription and that he no longer felt that there was a quality to the articles or indeed the subject matter. Participant 10 believed that the articles had become less adventurous and in response, so had her personal reading material.

Once again, quality, design, layout and a comprehensive or holistic approach to Wales were all elements that they wanted from a magazine. But both felt that, lately, their chosen magazines had not been delivering. Participant 9 was particularly negative expressing that there was a lack of relevance to Welsh culture and that there is a general lack of publicity as well as presence at live events. He had been a subscriber of Planet for many years but noted that there was no effective publicity for the magazine and that it would be difficult to know where to purchase it had he not known anyway. English language magazines, in their opinion, generally did not make the most of Welsh culture or make the most of its diversity.

Specifically, both participants felt there was a greater need for digital versions of the magazines, as in all of the groups previously discussed. Participant 9 however, suggested that there was also a greater need for a larger presence at live events, as he felt there was very little representation of the Welsh press who frequented English language Welsh poetry readings and conferences for example. He also felt that the websites that are available are incoherent and do not have a clear purpose when guiding their audiences. He suggested a digital magazine that would make interaction possible, similar to an open mic event but an online version, where people could discuss, compare and share work or ideas. This it seems is a reoccurring theme amongst most readers, and one that could prove effective and popular amongst all ages and backgrounds.

5. Conclusions

This final section draws together what are considered to be the key findings of the research.

The survey undertaken as **phase 1** was targeted at readers of the magazines currently supported by the WBC and those with an interest in the subject and issues being discussed. As such, the sample provides an indication of the market for the English-language magazines and the subjects being discussed. The key findings in that respect were

- Twenty-four per cent (107/445) of respondents were aged over 65 years and 50% were aged over 55. Only 8% of respondents were under 30;
- A considerable proportion of the group were retired (31%) with 42% in employment and 19% being self-employed.

This needs to be taken into account when discussing any marketing or promotional strategy for magazines in the subjects under review.

In terms of their interests, on average, the sample were most interested in current affairs (53% generally and 55% *in Wales*) and least interested in poetry (39% generally and 38% in Wales). A slightly higher proportion of respondents were interested in the subjects in question *in Wales* (e.g. current affairs *in Wales*) rather than generally in all subjects except poetry where there was a slightly higher proportion interested in the subject generally rather than in Wales (39% compared to 38%). Analysis, however, shows that the difference is only statistically significant in the cases of the 'arts in Wales' compared to 'arts in general' and 'history', where respondents are, on average, significantly more interested in Welsh history than in history in general.

The type of magazine (in terms of subject) that most respondents had purchased at any point in the last year related to literature in Wales (59%) and the type that they least purchased related to history in general (16%). This, of course, needs to be considered in light of the availability of magazines in those subjects as well as the level of interest in those subjects. Comparing the responses for issues which respondents had an interest in and the types of magazines that they had purchased in the last year shows that the biggest gap is apparent for 'history'; 41% said that they were very interested in history generally but only 16% said that they had purchased a magazine perceived to be about that subject in the last year. The same pattern is apparent for 'history in Wales' with 53% identifying themselves as being very interested in the subject but only 23% having purchased a relevant magazine in the last year. The gap is smallest for 'literature in Wales', a subject which 57% of respondents said they were very interested in and 59% had purchased a relevant magazine in the last year.

In terms of how regularly they purchase magazines, 62% of the sample could be classified as 'regular purchasers' of magazines buying at least one magazine a month suggesting that there is, generally, a strong demand for magazines within the sample. But, you clearly have to be familiar with a magazine before you can buy it and respondents were most familiar with current affairs magazines generally (61%); also the subject that they were most interested in as noted above. They were least familiar in magazines about the arts in Wales (11%). But, do those who are familiar with the magazines read or purchase them? In percentage terms, 'current affairs in Wales' is the category with most regular purchasers / readers (30%) and the arts is the lowest (2%).

As discussed in the report, one of the obvious ways in which the circulation of magazines can be increased is by converting those who are familiar with a magazine and read it but on an irregular basis into regular purchasers / readers. The analysis shows that the categories with the highest percentage of respondents in those categories is 'history generally' (72%) and 'current affairs generally' (67%). Further analysis found that 76% (339/445) of the sample as a whole fall within the 'target market' for eight magazines considered in greater detail. This suggests that there is a significant amount of overlap within the target market for all eight publications and, hence, the potential for joint or perhaps more significantly cross marketing on their part.

Looking at the current provision of English language magazines in Wales, respondents were most positive about the provision of magazines relating to current affairs generally (7.5 out of 10) and least positive about politics in Wales (4.3 out of 10). They also perceive the provision of magazines about the subjects under consideration generally to be better than the provision of magazines on the same subjects from and about Wales. For example, the provision of magazines about current affairs generally is rated at 7.6 compared to magazines about current affairs in Wales which is rated at 5.6. In this respect, the gap is clearly perceived to be in the provision of magazines that are specifically about the subjects *in Wales*; something also identified by the in-depth interviews discussed below. The same pattern is evident when respondents were discussing the quality of English language magazines; magazines about subjects generally are considered to be better than those specifically about the subject in Wales. Interestingly, the analysis found that there is a positive relationship between people's perception of the current provision of English language magazines and the quality of the provision; those respondents who score the current provision of English language magazines higher are more likely to rate the quality of provision highly. This suggests that the more aware you are of the magazines available, the more likely you are to rate the provision higher. So, would the perception of the quality of magazines increase if awareness of the magazines that are available increased? The findings of the analysis suggest that it would.

A relatively large proportion of the sample (37%) stated that they believed there was a gap in the current provision of English language magazines. There was a lot of variance in terms of what that gap was but the most prominent gaps identified were: history (3% - 14/445), current affairs (3% - 14/445) and politics (3% - 12/445). This is an indication of the very specific things that this group of respondents identified as gaps which makes targeting those gaps in provision difficult.

In terms of websites, a large proportion of our sample had visited websites about current affairs generally (66%) and current affairs in Wales (60%). However, only 30% (135/445) of respondents said they visited websites about poetry generally and 28% (125/445) visited websites on poetry from Wales and about Wales. Interestingly, analysis of the difference between regular and infrequent readers of magazines found that regular readers are more likely to visit websites relating to current affairs generally and in Wales, but that non-regular readers of magazines are more likely to visit websites relating to poetry, the arts and history both generally and in Wales.

Phase 2 found that the points below were relevant to all 10 participants when buying or subscribing to a magazine:

- Design and layout, including a good blend of in-depth and light content, are important to readers of magazines;
- There is a general lack of effective marketing and advertising of English-language magazines;
- There is a deteriorating focus on Wales and relevant Welsh culture within the magazines currently available;
- There is a need for a 'general' magazine specifically for young people;
- There is a need for online and digital tools including blogs, forms of social networking in order to provide a preview of magazines, share ideas amongst readers and so forth; and
- There should be a greater presence at live events, conferences and general research groups.

Though the participants were of varied ages and had very different interests, their views were actually very similar including what they considered as negative and positive features of English language magazines published in Wales. There was, for example, a general consensus of opinion when discussing the need for a comprehensive, online service as well as the lack of relevance regarding Wales and Welsh culture. Cost however was not an issue for many, with the general opinion being that people were willing to spend if the content was suitable and enjoyable.

From the data collected, it could be argued that magazines do influence and even determine the buying habits of readers, so an increase in readers and subscribers, could result in a general increase in interest in literature in / from Wales as a whole. It is however evident that much needs to change in order to attract and sustain new readers with advertising, accessibility and form being prioritised. Though it is not possible to generalise from the results above due to the nature of the research, it is apparent that many share this opinion, with a need to adapt and modernise becoming a high priority.

Appendix 1: Survey questionnaire

This questionnaire is available either in English or in Welsh. Please select the language in which you would prefer to complete the questionnaire:	Mae'r holiadur hwn ar gael naill ai yn Saesneg neu yn y Gymraeg. Dewiswch yr iaith y byddai'n well gennych i lenwi'r holiadur os gwelwch yn dda:
--	--

English / Saesneg	<input type="checkbox"/>
Welsh / Cymraeg	<input type="checkbox"/>

Background

This questionnaire is part of research which is being undertaken to collate the views of people living who have an interest in literary, cultural and current affairs issues in Wales. In particular, the research is exploring the reading habits of those with such an interest and views on English-language magazines in that field published in Wales.


The questionnaire should take no more than 10 minutes to be completed depending of course on how much information you're providing.

As a thank you, everybody who completes a questionnaire is entered into a prize draw. The first prize is £100 of book tokens and there will be four other prizes of £25 of book tokens each.

The research has been commissioned by the Welsh Books Council (www.wbc.org.uk), a national body funded by the Welsh Government which provides a focus for the publishing industry in Wales. It provides a number of specialist services (in the fields of editing, design, marketing and distribution) with a view to improving standards of book production and publication in both Welsh and English. It also distributes grants to publishers and actively promotes reading and literacy in Wales.

The research is being undertaken by the West Wales based independent research company, Wavehill (www.wavehill.com).

Any personal information that you provide will be strictly confidential and not used for any purpose other than this research. Your name will not appear in any reports that are produced based on the findings of this questionnaire.

If you're happy to complete the questionnaire, please click here: 

1. How interested are you in the following matters?

	Very interested	Interested	Some interest	No interest whatsoever
Current affairs generally				
Current affairs in Wales				
Cultural issues				
Cultural issues in Wales				
Politics generally				
Welsh politics				
Literature generally				
Literature from Wales and about Wales				
Poetry generally				
Poetry from Wales and about Wales				
The arts				
The arts in Wales				
History generally				
The history of Wales				

2. Are you particularly interested in any other subjects? If you are, please note them below.

--

3. How regularly do you purchase *magazines* (about any subject)?

At least one magazine a week	
At least one magazine a month	
Occasionally	
Never	
Other (please specify)	

4. What was the last magazine you purchased and when did you buy it?

5. Which magazines, if any, do you purchase and/or read on a regular basis? If you don't buy any magazines regularly you can just leave the box blank.

--

6. Have you purchased magazines relating to any of these subjects at any point in the last year?

	No	Yes	If yes, which ones? (if you know)
Current affairs generally			
Current affairs in Wales			
Politics generally			
Politics in Wales			
Literature generally			
Literature from Wales and about Wales			
Poetry generally			
Poetry from Wales and about Wales			
The arts			
The arts in Wales			
History generally			
The history of Wales			

7. Are you familiar with the following magazines?

	Yes	No		Yes	No
Granta			Poetry Wales		
Times Literary Supplement			New Welsh Review		
London Review of Books			Agenda		
PN Review			Cambria		
The Rialto			Welsh Country		
Literary Review			Envoi		
Modern Poetry in Translation			Wales Arts Review		
New York Review of Books			Leaf Writer's Magazine		
Art Review			The Big Issue Cymru		
Quarterly Review			Roundyhouse		
Tank			Red Poets		
Private Eye			Barddas		
The New Statesman			Taliesin		
New Internationalist			Golwg		
The Spectator			Barn		
The Economist			Planet		
BBC History					

8. [For the magazines the respondent is familiar with only] How regularly do you read the following magazines?

	Regularly (every or almost every issue)	Every now and again (fairly regularly)	Read it once or twice	Never
<i>List magazines identified in previous question here</i>				

[Questions 9 to 12 are for respondents who answer that they have read Planet, New Welsh Review, Poetry Wales, Envoi or the Welsh Agenda]

9. Did you buy /purchase the copy of XXXX that you read?

Yes	No	Can't remember
-----	----	----------------

10. [If yes] Where did you buy it?

11. [If no] Where did you read it / get your copy?

12. On a scale of 0 (very poor) to 10 (very good), how do you rate [magazine]?

13. Please explain your answer.

14. Please rate the current provision of English language magazines regarding the following subjects? 0 = no magazines available. 10 = plenty of relevant magazines available

	0	1	2	3	4	5	6	7	8	9	10	Don't know
Current affairs generally												
Current affairs in Wales												
Politics generally												
Politics in Wales												
Literature generally												
Literature from Wales and about Wales												
Poetry generally												
Poetry from Wales and about Wales												
The arts												
The arts in Wales												
History generally												
The history of Wales												

15. Please record any comments you may have in support of the ratings you have noted above here

--

16. Please rate the quality of the current provision of English language magazines regarding the following subjects? 0 = Very poor. 10 = very good

[Subjects which the respondent noted '0' or 'don't know' in the previous question should not be included in the table here]

	0	1	2	3	4	5	6	7	8	9	10	Don't know
Current affairs generally												
Current affairs in Wales												
Politics generally												
Politics in Wales												
Literature generally												
Literature from Wales and about Wales												
Poetry generally												
Poetry from Wales and about Wales												
The arts												
The arts in Wales												
History generally												
The history of Wales												

17. Please record any comments you may have in support of the ratings you have noted above here

--

18. Are there any gaps in the current provision of English-language magazines which you would like to see addressed?

--

19. Do you own a tablet computer (for example, an iPad)?

Yes	
No – but are considering buying one within the next 6 months	
No – and am not considering buying one in the next 6 months	

20. [If yes] Have you ever purchased a tablet computer version of any magazines?

Yes – you do so on a regular basis	
Yes – but you don't do so regularly	
Never	

21. Do you visit websites relating to the following subjects?

	No	Yes
Current affairs generally		
Current affairs in Wales		
Politics generally		
Politics in Wales		
Literature generally		
Literature from Wales and about Wales		
Poetry generally		
Poetry from Wales and about Wales		
The arts		
The arts in Wales		
History generally		
The history of Wales		

22. Do you visit websites relating to other matters on a regular basis? If you do, which matters to they relate to?

--

23. Are you a member of any groups, clubs or associations relating to the magazines and subjects discussed in this questionnaire? If you are, please record them here.

--

24. What is your gender?

Male	
Female	

25. To which age group do you belong?

Under 20		46 to 50	
20 to 25		51 to 55	
26 to 30		56 to 60	
31 to 35		61 to 65	
36 to 40		Over 65	
41 to 45		Would rather not say	

26. In which county do you live?

Outside the UK	Please note where:
Would rather not say	

27. What is your postcode? We're asking this because we'd like to map out where those who have responded to our survey live and to see whether there are any patterns. The information will not be used for any other purpose.

28. What is your employment status?

In Employment (as an employee)	
Self employed	
Unemployed	
Unable to work due to a Long Term Illness or disability	
In education	
Unpaid Family Worker (housewife, househusband, carer, etc.)	
Retired	
On a government supported employment training course (please specify)	
Would rather not say	

29. If you're working, what is your profession?

Thank you for completing the questionnaire

30. As a thank you, your name will now be entered into the prize draw. The first prize is £100 of book tokens and there will be four other prizes of £25 of book tokens each. If you would like to be entered into the draw please note your name and contact details below:

Name	
Email	
Telephone	

If you don't want to be entered into that draw, please tick this box ☐

31. As part of the research we will also be holding a number of short (less than an hour) focus groups to discuss the matters covered by this questionnaire further in different locations across Wales. Would you be happy to be contacted if we're holding a focus group in your area? As a thank you, all those attending the focus group will receive £10 of high street vouchers.

If you're happy to be contacted please note your name and contact details below if you haven't already done so above. Please note that there is no requirement to participate in a focus group if you provide your contact details here. You can always say no if and when we contact you!

Name	
Email	
Telephone	

If you don't want to be contacted to ask if you would like to participate in a focus group, please tick this box ☐

32. Finally, the Welsh Books Council may wish to contact you at some point in the future to ask you some further questions about your reading preferences and/or habits. Would you be happy for them to do that? Importantly, if you agree that you can be contacted they will only do so for research purposes and your details will not be passed on to a third party for any other purpose under any circumstances.

If you're happy to be contacted in the future please note your name and contact details below if you haven't already done so above.

Name	
Email	
Telephone	

If you don't want to be contacted for research purposes in the future, please tick this box ☐

If you would like to find out more about Wavehill, please visit our website: www.wavehill.com

All our research is undertaken within the Market Research Society's Code of Conduct - <http://www.mrs.org.uk/standards>. If you have any comments about the questionnaire or the research more generally, please email them to endaf.griffiths@wavehill.com. Alternatively, you can contact the Welsh Books Council: info@wbc.org.uk / gwybodaeth@cllc.org.uk

Appendix 2: Questionnaire distribution letter / email

Market Research: English-language magazines published in Wales

We are hoping that you will be able to contribute to an important research project that has been commissioned by the Welsh Books Council by completing a very short questionnaire.

The purpose of the research is to collate the views of people who have an interest in literary, cultural and current affairs issues in Wales. In particular, the research is exploring the reading habits of those with such an interest and views on English-language magazines in that field published in Wales. The findings of the research will be used to inform the ongoing activities of the Welsh Books Council including the funding of magazines published in Wales.

The questionnaire that we would like you to complete should take no more than 10 minutes to fill-in depending of course on how much information you're providing. It is available on-line at the following website:

- English language version: www.magazinesfromwales.co.uk
- Welsh language version: www.cylchgronauaesneg.co.uk

Alternatively, you can book an appointment to complete the questionnaire via a telephone conversation with one of our researchers by calling our freephone on 0800 917 5249 or by emailing your contact details to magazinesfromwales@wavehill.com or cylchgronauaesneg@wavehill.com.

As a thank you, everybody who completes a questionnaire either on-line or by telephone is entered into a prize draw. The first prize is £100 of book tokens and there will be four other prizes of £25 of book tokens each.

You have received this letter because you subscribe to one of the magazines that is supported by the Welsh Books Council; **XXXXXXXXX**. Your name and address was provided to us by the publishers of that magazine on postage labels only. We have not reproduced this information for our research, nor have we passed on any of your personal details to any third parties.

We want to ensure that as many people as possible participate in this research so please feel free to forward this information to any of your colleagues or friends who you believe would be interested in participating.

I hope that you will be able to contribute to this important research project.

Yours faithfully



Endaf Griffiths

Lead researcher for the project

01545 571711 | endaf.griffiths@wavehill.com

Ymchwil i'r Farchnad: cylchgronau Saesneg a gyhoeddir yng Nghymru

Rydym yn gobeithio y gallwch gyfrannu at brosiect ymchwil pwysig sydd wedi'i gomisiynu gan Gyngor Llyfrau Cymru drwy lenwi holiadur byr iawn.

Pwrpas yr ymchwil yw casglu barn pobl sydd â diddordeb mewn materion llenyddol, diwylliannol a chyfoes yng Nghymru. Yn benodol, mae'r ymchwil yn ymchwilio i arferion darllen y rheiny sydd â'r diddordebau hyn yn ogystal ag ymchwilio i'w barn ar gylchgronau Saesneg yn y meysydd hyn a gyhoeddir yng Nghymru. Defnyddir canfyddiadau'r ymchwil i roi gwybodaeth i weithgareddau parhaus Cyngor Llyfrau Cymru gan gynnwys ariannu cylchgronau a gyhoeddir yng Nghymru.

Ni ddylai'r holiadur yr hoffem i chi ei lenwi gymryd mwy na 10 munud i chi, yn dibynnu wrth gwrs ar faint o wybodaeth yr ydych am ei rhoi. Mae'r holiadur ar gael ar-lein ar y wefan ganlynol:

- Fersiwn Cymraeg: www.cylchgronauaesneg.co.uk
- Fersiwn Saesneg: www.magazinesfromwales.co.uk

Neu fel arall gallwch drefnu amser i lenwi'r holiadur drwy sgwrs ffôn ag un o'n hymchwilyddwr drwy ffonio 0800 917 5249 neu drwy ebostio eich manylion cysylltu i cylchgronauaesneg@wavehill.com neu magazinesfromwales@wavehill.com.

Fel diolch, bydd enw pawb sy'n llenwi'r holiadur – naill ai ar-lein neu dros y ffôn — yn cael ei roi mewn het. Y wobr gyntaf fydd gwerth £100 o docynnau llyfr ac yna bydd pedair gwobr arall o docynnau llyfr £25 yr un.

Rydych wedi cael y llythyr hwn gan eich bod yn tanysgrifio i un o'r cylchgronau sy'n cael cefnogaeth Cyngor Llyfrau Cymru, sef **XXXXXXXXXX**. Rhoddodd cyhoeddwr y cylchgrawn eich enw a'ch cyfeiriad i ni ar labeli postio yn unig. Nid ydym wedi atgynhyrchu'r wybodaeth hon ar gyfer ein hymchwil, ac nid ydym wedi trosglwyddo eich manylion personol o gwbl i unrhyw un arall.

Rydym am gael cynifer o bobl â phosibl i gymryd rhan yn yr ymchwil hwn, felly mae croeso i chi anfon y wybodaeth at unrhyw un o'ch cydweithwyr neu ffrindiau os credwch y byddai ganddynt ddiddordeb cymryd rhan.

Gobeithio y byddwch yn gallu cyfrannu at y prosiect ymchwil pwysig hwn.

Yr eiddoch yn gywir



Endaf Griffiths

Prif ymchwilydd y prosiect

01545 571711 | endaf.griffiths@wavehill.com

Appendix 3: Target market analysis for individual magazines

Agenda

When looking at those respondents who said they read Agenda every now and again or read it once or twice, it is possible to see that 60% (52/86) were male and 40% (34/86) were female similar to the sex ratio identified in the main survey.

Forty two per cent (37/86) of respondents were in employment and a further 27% (23/86) were self employed; Twenty three per cent (20/86) of respondents said they were retired, this is 8 percentage points lower than cited in the main survey. Thirty six percent (31/86) of respondents were over the age of 60 which is three percentage points less than the main survey and 17% were from Cardiff which is four percentage points higher than cited the main survey. Interestingly, 19% (16/86) of respondents stated they bought at least one magazine a week and 49% (42/86) said they bought at least one magazine a month.

Barddas

The 'target market' for the magazine Barddas shows that 44% (20/45) of respondents in this niche are female and 56% (25/45) are male, this is a slightly higher ratio of females to males than is seen in the main survey. Addressing the age profile shows that 29% (13/45) of respondents in this group are over the age of 60 and 13% are aged under 30 years, 5 percentage points higher than the main survey. Twenty two per cent of respondents came from Cardiff, which is 8 percentage points higher than the main survey and 58% (26/45) of respondents said they were in employment which is 16 percentage points higher than the main survey, 24% (11/45) of respondents said they were retired this is 7 percentage points lower than the main survey. It is also very interesting to note that 44% (20/45) of respondents stated they bought at least one magazine a week and a further 38% (17/45) said they bought at least one magazine a month, 82% which is 12 percentage points higher than the total identified in the main survey.

Barn

Of the respondents who said they had read Barn 'every now and again' or 'read it once or twice', 61% (45/74) were male and 39% (29/74) were female. Forty one (30/74) per cent of respondents were over the age of 60, and only 7% (5/74) of this target group were under the age of 30. Twenty six per cent (19/74) said they bought a magazine once a week and a further 46% (34/74) bought at least one magazine once a month. Seventeen per cent (13/74) came from the Cardiff area, and 12% (9/74) came from outside of the UK. Forty nine per cent (36/74) of respondents were in employment and 31% (23/74) were retired.

Cambria

The 'target market' identified for the magazine Cambria is made up of 62% (85/136) male and 38% (51/136) female respondents. Forty four per cent (59/135) of respondents were over the age of 60 and only 7% (10/136) were under the age of 30. Forty five (61/136) per cent of respondents said they were in employment, 27% (36/136) said they were retired and 21% (28/136) of respondents stated they were self-employed. Seventy two per cent (97/136) said that they bought at least one magazine at least once a month.

Envoi

Fifty six per cent (25/45) of the 'target market' identified for the magazine Envoi were male and 44% (20/45) were female. Thirty four per cent (15/45) were over the age of 60. Thirty per cent (13/45) were in employment, 32% (14/45) were retired and 34% (15/45) were self employed. Twenty four per cent (11/45) of respondents said they buy a magazine at least once a week and 47% (21/45) said they bought at least one magazine at least once a month.

New Welsh Review

When looking at the 'target market' for the New Welsh Review, 58% (80/137) were male and 42% were female (57/137), 39% (52/134) of respondents were over the age of 60, 50% (67/134) were aged between 30 and 60 and 11% were aged under 30 (15/134). Thirty nine per cent (52/134) of respondents are in employment, 28% (37/134) are retired and 26% (35/134) were self-employed. Twenty per cent (28/137) of respondents who fall into the target market for the New Welsh Review say they bought at least one magazine at least once a week, and 42% (86/137) said they bought at least one magazine at least once a month.

Planet

The 'target market' for the Planet consists of 53% (72/135) male and 46% (63/135) female. Thirty nine per cent (52/134) are aged over 60, 49% (66/134) are aged between 30 and 60 and 12% (16/134) are aged under 30. Forty one per cent (55/133) of the target market said they were in employment and 27% (36/133) said they were retired. Sixty three per cent (85/135) of respondents said they purchased a magazine at least once a month.

Poetry Wales

Fifty three per cent (73/137) of the 'target market' are male, and 47% (64/137) are female. Twelve per cent (16/135) were under the age of 30 and 40% (54/135) were over the age of 60. Forty two per cent (56/134) of the target market readers for Poetry Wales stated they were in employment, and 28% (37/134) said they were retired. Fifty eight per cent (80/137) of respondents stated that they bought a magazine regularly (at least once a month) and 4% said they never bought a magazine.

Appendix 4: Magazines discussed in the report by category

Note: In the case of magazines that cover subject matter in more than one category the magazine has been categorised by the main-focus of the magazine's content or editorial approach.

Private Eye	Current Affairs Generally
Planet	Current Affairs in Wales
Times Literary Supplement	Literature Generally
New Statesman	Current Affairs Generally
The Economist	Current Affairs Generally
New Welsh Review	Literature from Wales and about Wales
Poetry Wales	Poetry from Wales and about Wales
The Spectator	Current Affairs Generally
London Review of Books	Literature Generally
The Big Issue Cymru	Current Affairs in Wales
Golwg	Current Affairs in Wales
Agenda	Current Affairs in Wales
Granta	Literature Generally
Cambria	Current Affairs in Wales
The New York Review of Books	Literature Generally
Barn	Current Affairs in Wales
Taliesin	Literature from Wales and about Wales
Literary Review	Literature Generally
New Internationalist	Current Affairs Generally
BBC History	History Generally
Barddas	Poetry from Wales and about Wales
PN Review	Poetry Generally
Modern Poetry in Translation	Poetry Generally
Envoi	Poetry from Wales and about Wales
The Rialto	Poetry Generally
Roundyhouse	Poetry from Wales and about Wales
Quarterly Review	The Arts
Art Review	The Arts
Leaf Writers' Magazine	Literature from Wales and about Wales
Wales Arts Review	The Arts in Wales
Welsh Country	Current Affairs in Wales
Red Poets	Poetry from Wales and about Wales
Tank	The Arts

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