

Looking *Forward*

Welsh Books Council
Strategic Plan

June 2016

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1 FOREWORD

The Welsh Books Council is required to draw up an annual Executive Plan to be approved by the Welsh Government. This Plan comprises a summary of the Council's programme of work for the year and notes targets which we are expected to meet. We also publish an Annual Report, which is a historical record of our work within the compass of a financial year. These documents are available to read annually on the Council's website.

The above documents are, in essence, concerned with the present day, and over recent times two elements run through them like a silver thread. There is a strong desire to protect all that has been achieved over the years but, more importantly, we also see a genuine aspiration to develop the publishing industry – for the sake of the readers, certainly, but also to ensure an industry that is both flourishing and viable.

In drawing up this document, 'Looking Forward', our aim is to look beyond the challenges of a financial year, to seek to strengthen the foundations for the future, and to extend our work in new directions, taking into consideration the readers' needs and how best to fulfil those needs for the next five-year period.

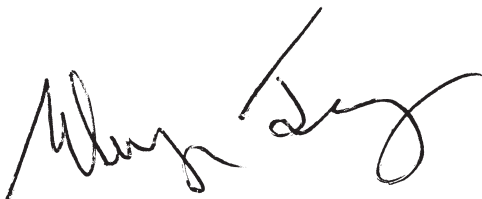
In preparing this plan, we were also able to benefit from a very valuable review of the Council's work, commissioned by the Welsh Government, namely the Review of Support for Books from Wales, by Martin Rolph (November 2014), and the Plan contains references to that report. Several of the recommendations of the Rolph Report have been adopted here.

Those who have, in the past, tried to forecast the future of publishing have found it an impossible task. Five years ago, for example, many people were forecasting the demise of the popular printed book, but it continues to flourish. The all-important factor for the Council is that we try to ensure a robust industry which is flexible and capable of adapting in order to take advantage of opportunities in the market.

To complete the circle, this document will feed back into the work of preparing the next Executive Plan, elaborating on individual activities and services and on the particular targets that will have been set for the year – and it will dovetail with the industry's development path within this strategy.

As we know, there are two meanings to the expression 'looking forward'; the first is the literal sense of looking in a particular direction, and the Council hopes that this document will provide a direction for the work for the forthcoming period; 'looking forward' can also be taken to mean a strong wish to face the challenges ahead – and we strongly believe that the publishing industry in Wales is full of enthusiasm and hope for the future.

We look forward, therefore, to another exciting period for publishing in Wales.



ELWYN JONES

Chief Executive
Welsh Books Council

2 INTRODUCTION

The Welsh Books Council, which was established in 1963, has developed and extended its duties over the years, and it now forms a cornerstone for the publishing industry in Wales. Its vision is clear, namely promoting and developing the publishing industry in both languages, and its current function – as noted in the Annual Report – is based on the objectives contained in the original constitution:

- To stimulate interest in books in Welsh and Welsh books in English, together with other related material.
- To promote the publishing industry in Wales and to co-ordinate the interests of authors, publishers, booksellers and libraries.
- To assist and support authors by providing services and by awarding grants/commissions which are channelled through publishers.
- To distribute grants to help publish quality material in both Welsh and English and to ensure that the output is widely available.

The main purpose of these objectives is, of course, to fulfil the needs of readers. The Council and the publishing industry are more aware than ever of the importance of responding to the needs of the market and the aspirations of members of the public, and it is always alert in recognizing opportunities to enable it to accomplish that work – not only with regard to content, but also in considering reading patterns and publishing formats.

Services to the Booktrade

The services and support provided by the Books Council to the booktrade can be divided into three main categories: Specialist Services, Distribution of Publishing Grants, and maintaining a self-financing Distribution Centre.

These elements are vital in the work of supporting a varied, high-quality publishing industry which thrives here in Wales.

Specialist Services

The Council provides services in the fields of design, editing, sales and marketing, and bibliographic information, and these departments have helped publishers to ensure high standards and to develop and professionalise their output.

Because of the importance of children's books, and the need to develop the readers of the future, the Council also has a department that focuses on this vital work and cooperates with schools and libraries in order to promote books and support literacy initiatives.

Distributing Grants

Through its Welsh- and English-language Publishing Grants Panels, the Books Council distributes funds of approximately £2.3m annually in order to ensure a wide range of printed and digital materials that include books and magazines. Funding is also provided for marketing schemes and for supporting posts in publishing companies.

The Distribution Centre

The Distribution Centre, located on the Glanrafon Industrial Estate on the outskirts of Aberystwyth, is a one-stop centre for Welsh books and for English books of Welsh interest; it also provides a vital link between the publishers and the booksellers – and, ultimately, the readers. The Centre (and the Gwales website) lists approximately 38,000 different publications, with some 10,000 of them in stock at any one time.

The Distribution Centre is entirely self-financing, and any profit made is reinvested in its work.

3 THE BOOKS COUNCIL'S MISSION

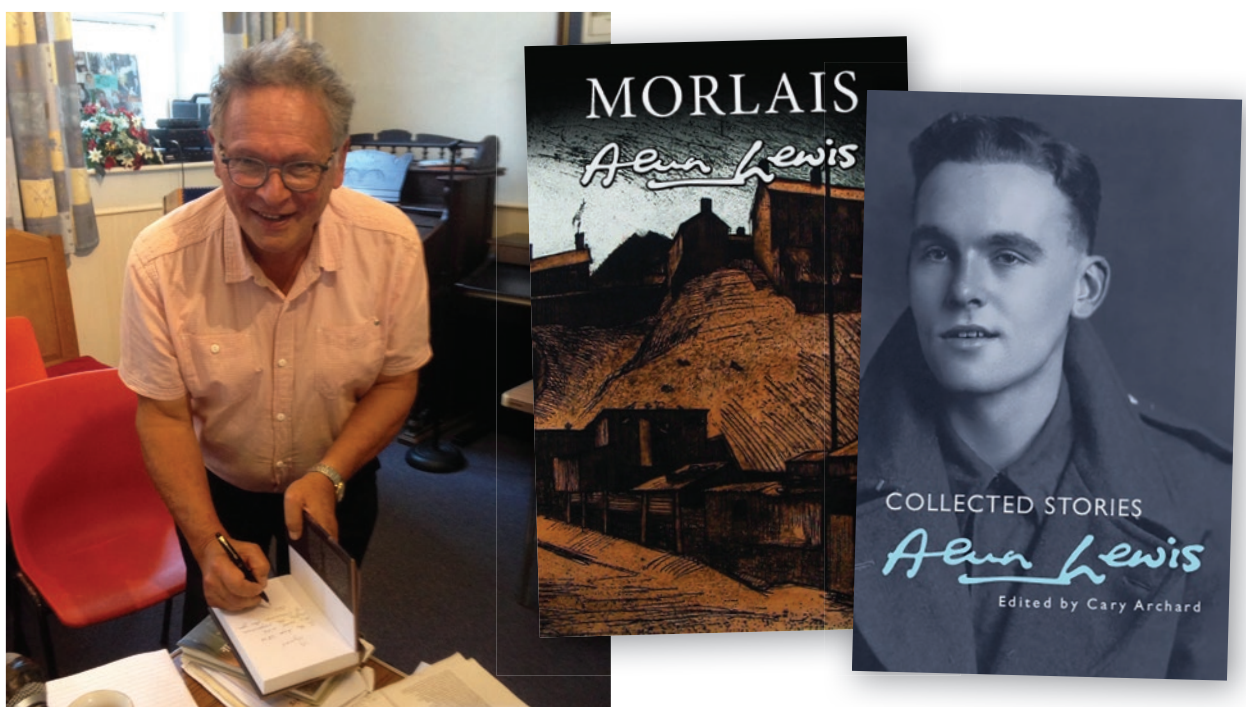
The Council's mission is clear, and at its simplest its objective is to promote and develop the publishing industry in Wales. That has been its mission since the earliest days, although its responsibilities have extended and developed greatly over the past fifty years.

Public perceptions as well as the publishing industry itself have also changed during that period, and as a result the Council has had to respond to the demands of the market and the aspirations of readers. But, throughout, the Council's core principles are in keeping with the original vision, and they include the following:

- Ensuring a wide variety of reading material for the readers
- Ensuring material of a high standard as regards content and production
- Supporting the publishers to ensure that they have the relevant skills and resources to enable them to undertake the work
- Providing training for publishers in specific fields

- Providing specialist services to support the work of publishers
- Supporting booksellers to enable them to run thriving businesses
- Providing corresponding services in both languages
- Ensuring that the content is provided in formats that appeal to the readers
- Promoting and publicising books from Wales
- Promoting and publicising reading in Wales
- Developing staff training and ensuring a flexible workforce.

The aim of the Council is to continue to respect, protect and prioritise these fundamental responsibilities, in the belief that they are essential to the development of a publishing industry which is progressive, robust and full of vitality, and which will be perfectly capable of responding to future needs.



4 THE WELSH BOOKS COUNCIL – A NATIONAL INSTITUTION

The Council is the main body that leads, supports and develops the publishing industry in Wales. Indeed, the Council combines the responsibility of several different bodies in other countries – such as associations of publishers and booksellers, agencies that sponsor the arts, and bodies that promote books and reading.

Over the years, the Council has nurtured and won the respect of its partners as a body that not only understands their needs, but is also willing to challenge them to ensure the best for the industry and the readers. As noted in the Review of Support for Books from Wales, prepared by Martin Rolph and commissioned by the Welsh Government, ‘It is a well respected, stable organisation, having assembled, and continued to develop, formidable commitment, relevant skills and experience, and corporate memory provided by its staff, Council and various panel members and a track record of delivery’.



The observations noted above are one reason why the representatives of so many international institutions and agencies have visited the Council over the years, and have shown an active interest in the support given to publishing in a minority language.

We can, therefore, state clearly that the Council is now a truly ‘national’ body, as it serves both languages and both cultures of the modern Wales of which we are all part.

In preparing for the forthcoming period, the Strategic Plan is underpinned by the following:

- As a body that promotes and develops the publishing industry in Wales, the Council will commit itself to protecting the industry for the benefit of readers in Wales and beyond.
- The Council is a progressive body that adapts and responds in a robust and creative manner to the needs of the market in an extremely dynamic period which is full of exciting possibilities as well as challenging threats.
- In its national role, the Council works closely with the publishers and booksellers, and offers them guidance with regard to developing an industry which is robust, dynamic and viable.
- As a national body, the ‘brand’ must be clear and explicit to all. The Welsh name of the institution, Cyngor Llyfrau Cymru, succeeds in doing that, but the English name, The Welsh Books Council, is rather ambiguous, with many believing that the Council only supports Welsh-language books. To this end, consideration will be given to changing the English name to The Books Council of Wales, thereby showing our clear commitment to both languages. This will be helpful to the Council’s profile in addition to the work of marketing books.

- As a body that works through the medium of Welsh, the Council will be a model of a body that notes clearly that Welsh is the administrative language of the organization, and it can take pride in the bilingual service of the highest standard it offers to all. It can be foreseen that the Council could share its experiences with other institutions as they too consider their services in a bilingual Wales.
- The Council is in the fortunate position of owning its headquarters in Aberystwyth (Castell Brychan) and its business warehouse (the Distribution Centre), with all the attendant benefits. The Council will hold a full audit of the standard of its estate, and the need to invest in its buildings, in order to maintain them to the required standard into the future.
- The Books Council will look carefully at its current management structure – an Executive Committee and Council – to ensure that it is appropriate for a body that is able to respond swiftly to new opportunities and business challenges. In the wake of any changes, the Council will be eager to protect the benefits that come as a result of close collaboration with local government and associated institutions.
- The Council is always eager for closer co-operation with associated partners such as librarians, publishers, booksellers, authors and members of the Friends of the Books Council, in order to disseminate the message about the successes of the industry to a new audience, taking advantage of the central location of its offices in mid-Wales to emphasise its relevance to the whole of Wales.
- The Council will examine opportunities to attract additional funding for projects in the areas of book promotion and literacy to complement the support given by the Welsh Government, such as commercial sponsorship and applications for Lottery funding.
- The Review of Support for Books from Wales referred to the way in which the Welsh Government notes the Council's financial apportionment in the Award Letter, recommending that the core costs should be divided between direct costs (the cost of specialist services) and the true core costs (the central running costs of the Council). Following completion of this process, the Council will assess the level of its administrative costs and compare them with other bodies within the arts sector.



5 THE PUBLISHING SECTOR AS A BUSINESS

The Council has consistently underlined the importance of the publishing industry to the Welsh economy, and the importance of our partners within the publishing trade as viable and successful businesses. It is estimated that approximately 1,000 people are employed within the industry, including authors, creative and copy editors, designers and illustrators, printers and booksellers.

It is interesting also to examine a map showing the location of the main publishers and booksellers throughout Wales, noting the importance of the geographical distribution. It can be seen that all corners of Wales are serviced by the industry, and that it therefore contributes to the economy of several areas (see the Appendix of maps showing the location of publishers/booksellers).

For the Council, the main yardstick from the point of view of sales is the annual turnover of the Distribution Centre. With a turnover of around £3m, it is worth noting that the figure is currently increasingly reliant on the Welsh Government's specific schemes to invest in reading material for schools. As noted in the Welsh Government's review of the support for books from Wales, 'the Distribution Centre, as the biggest wholesaler of books in Wales, is critically important to publishing in Wales'; it further notes, 'Some publishers and small bookshops would almost certainly not have survived without the services provided by the WBC's Distribution Centre'.

The more successful the industry, including the Council itself, the better the opportunities to attract additional financial backing will be. And although this will never be able to take the place of central support, it will certainly be helpful in the case of some developments.

In preparing for the forthcoming period, the Strategic Plan is underpinned by the following:

- Appreciating the central role played by publishers, the Council and booksellers within the supply chain and realising that, although the priorities of partners may vary, the system we have is mutually dependent and deserves to be respected.
- Underlining the contribution made by the publishing industry not only to the field of reading and literacy, but also to the Welsh economy.
- Viewing the Distribution Centre as a central element to the success of the publishing industry in Wales, and recognizing its importance to the trade; realising that the Distribution Centre and the industry in general are facing a challenging period as a result of the current economic climate and that there is a positive element to schemes such as the Welsh Government's literacy/reading schemes.
- Realising that self-publishing is now an intrinsic part of the pattern of publishing in Wales, and giving consideration to the advantages and implications of this to the Distribution Centre.
- With the Distribution Centre's business being so central to the future of the publishing industry, a Business Panel should be set up to oversee its activities and report to the Chief Officers.
- Developing information technology systems to meet the needs of the Council and its partners realising the importance of investing in order to ensure secure and robust business networks, and establishing an internal technical team to lead the work.
- Undertaking research to measure the contribution of the industry to the Welsh economy.

6 ENSURING A RANGE OF HIGH-QUALITY OUTPUT

In its central role within the publishing industry in Wales, the Council is very aware of its responsibilities in ensuring a wide range of high-quality material for readers. To this end, the Council offers financial support, specialist services and training for publishers – with a view to raising standards and developing the industry.

The Welsh Government’s review of the support for books from Wales summarises this as follows:

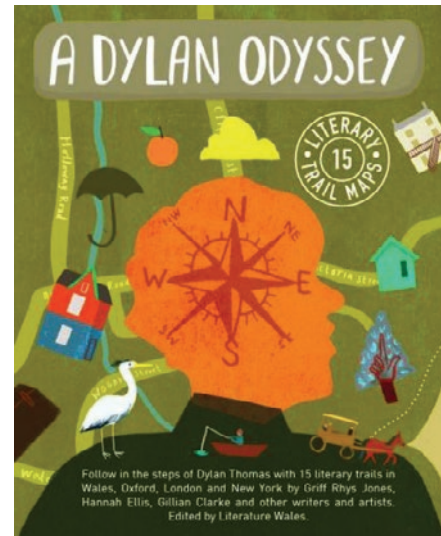
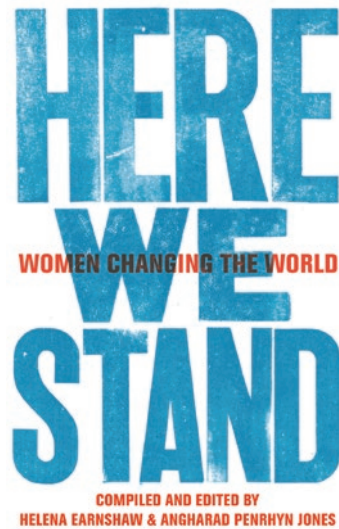
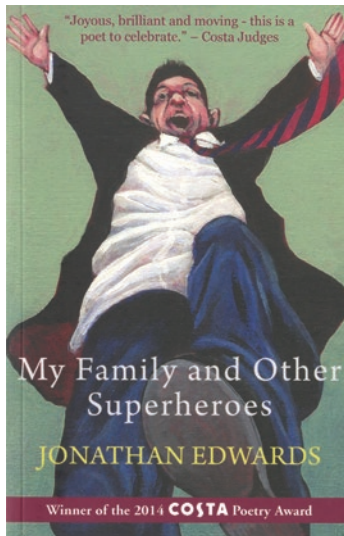
‘Some newer publishers in Wales would not have come into existence or survived or grown without . . . the services provided free or heavily subsidised by WBC.’

‘Existing publishers would not have grown the numbers of titles published, the numbers sold and the numbers of staff they employ without the various types of WBC support.’

In preparing for the forthcoming period, the Strategic Plan is underpinned by the following:

- Emphasising the key role played by the Council within the publishing industry in ensuring a range of high-quality reading material for readers, whilst protecting the financial investment necessary to undertake the work.
- Maintaining the support for Welsh- and English-language material, and contributing in a positive way to bridging between the two cultures of Wales.
- Ensuring a range of reading material – from the classics to popular fiction, and from poetry to factual books – in order to fulfil the needs and interests of readers in Wales, in both languages.
- Emphasising the need for high-quality material, and supporting publishers – through providing grants and training – to enable them to achieve this aim.
- Placing responsibility on every publisher to ensure an acceptable balance within their publishing list in order to meet the needs of readers, together with ensuring sufficient sales to support viable businesses.
- Placing responsibility on the Council – through its Publishing Grants Panels – to ensure a balance between these publishing lists, taking the requirements of the market into consideration and ensuring that not too many books are published in some fields, thus over-supplying the market.
- Seeing a need amongst the public for digital material side by side with printed material, and promoting both forms. It can also be foreseen that the Publishing Grants Panels, in the future, are likely to receive more applications for reading material in digital form only (digital magazines are already supported) and reprints in digital form.





- Providing a training programme for publishers, with the aim of developing skills in the workforce for the benefit of the industry.
- Following the new franchises awarded to magazines from Wales – in English (2015) and in Welsh (2016) – we will support them to increase their appeal, to extend their reach, and to consider multi-platform formats.
- Placing an emphasis on supporting co-operation networks within the publishing industry – such as Cwlwm Cyhoeddwy, the consortium of Welsh-language publishers – for the benefit of all partners.
- Encouraging further discussions on the field of academic publishing in Wales, focusing on funding structures together with the responsibilities of various partners to maintain and develop the field.
- Giving consideration to, and prioritising, a programme of research which will form the basis of future developments, building on the relationship formed with the higher education sector in Wales.

7 REACHING READERS

Following on naturally from the point made above, where emphasis was placed on the range and quality of the output, it is vital that the same attention and effort is put into the work of promoting the material and ensuring that the public is made aware of its existence. This is one of the main challenges facing us in the forthcoming period, especially as so many other media are also competing for attention.

One of the main advantages of the publishing industry is the collaboration between the various partners – whether they be authors, publishers, booksellers, librarians or the Council itself – as our shared aim is to bring the output to the attention of the readers. There is, therefore, a new opportunity for the partners to work together for the benefit of the industry.

In preparing for the forthcoming period, the Strategic Plan is underpinned by the following:

- Encouraging publishers to identify their market and supporting them, through the grants system, to provide for that market.
- Confirming our commitment to the independent bookshops, and appreciating their central role in promoting books.
- Continuing our close contact with chain stores, and working together to extend their selection of books from Wales.
- Preparing specific campaigns/promotional material, in co-operation with bookshops (both independent and chain stores), libraries and the education sector.
- Identifying opportunities to work with other sales outlets, such as supermarkets, craft shops, galleries and visitor centres, and preparing specific schemes for them.
- Appreciating the fact that customers buy their reading material from a variety of vendors/sources, and understanding the attraction of buying on-line, together with the implications for promotional campaigns.
- Appreciating, also, that we have a responsibility to reach out to reluctant readers and introduce them to the world of books and secure a range of suitable publications.



- Taking advantage of opportunities to supply books to suppliers outside Wales.
- Assessing publishers' sales targets in the wake of the developments in digital publishing (with an opportunity to increase sales considerably in some fields).
- Continuing to develop the Gwales 'family' of websites to ensure that they are accessible to users and that they present information in a clear and straightforward way.
- Ensuring that the bibliographical information supplied is both correct and comprehensive, for the benefit of the book trade as well as members of the public, and that the information forms a basis for various promotional campaigns.
- Collaborating, and developing the relationship, with librarians in order to ensure publicity for books from Wales, whilst appreciating the central role played by librarians in reaching the readers. Also, due to the decreasing numbers of specialist staff within libraries examining ways of working with the library sector to select and order stock.
- Reviewing and adapting all the Council's promotional schemes to ensure that they appeal to the readers, and making good use of our partners' knowledge and specialisms in order to develop the schemes.
- Collaborating with partners within the media to ensure publicity for books, placing a specific emphasis on English books from Wales.
- Reviewing the use made of social media to ensure that we are disseminating information and engaging the audience with books from Wales.
- Continuing to conduct research in the fields of targeting readers and book-buying patterns, that will be helpful when planning for the future, and working in collaboration and sharing information with partners.



8 THE NEXT GENERATION OF READERS

The Books Council is very aware of the changes that have been witnessed within the publishing industry in Wales over recent years, often reflecting world-wide changes. The move towards digital publishing was embraced, and although it has not resulted in the swift transformation that some had forecast, it is nevertheless a far-reaching development. There have been alterations also in readers' buying patterns, with alternatives to the traditional bookshop being available to customers.

We are equally aware that we must prepare for the next generation of readers, ensuring that they are able to gain access to a range of reading material in various forms; we must, therefore, give due attention to the content, in addition to the publishing formats.

The Council has, during recent times, focused on the field of children's books, commissioning a report into Welsh-language books that referred clearly to the challenge of maintaining the interest of teenage readers in Welsh reading material. A report was also produced on the patterns of reading and buying Welsh-language books amongst young people. In the context of English-language books for children, an additional investment was secured in the field, resulting in two short series of attractive books, and the establishment of a new publishing company.

In preparing for the forthcoming period, the Strategic Plan is underpinned by the following:

- By means of the grants system, publishers will be encouraged, and given opportunities, to develop new and exciting material to appeal to new readers.
- In the context of Welsh-language books for very young children, the Publishing Grants Panel should monitor the range and number of books being published, to ensure that the market is not being flooded with similar titles.
- The general opinion is that, although the balance between original Welsh-language titles and adaptations is quite satisfactory, it is necessary to keep a close eye on the situation to ensure that we are investing in our indigenous authors at the same time as benefiting from the financial/promotional advantages that come from supporting adaptations of popular books from outside Wales. If it is felt that too many books for younger readers are being produced, it will be necessary to look carefully at the balance between original titles and adaptations.



- It is becoming obvious that we are losing readers in the 11+ age group, therefore the Council and the Welsh Government's Education Department should give consideration to the challenge facing us and lead a discussion on this important area.
- The Council welcomed the recent developments in the field of English-language books for children. Funding should be ensured in order to maintain momentum so that children and young people from Wales are supplied with a range of English-language books related to their own culture and background.
- Ensuring the continuation of exciting developments in the digital field, giving readers a choice, without undermining the continuing demand for printed material.
- Giving full consideration to the formats that readers will choose in the future – including printed books, e-readers and iPads, together with mobile phones – and other formats that will be developed in the future.
- It is becoming increasingly obvious that many teachers do not have the necessary information about the field of children's books to enable them to guide young readers towards material suitable for their age and background. There are serious implications for this with regard to the effort to promote literacy, and the Council will be eager to be a part of any discussions in this area.
- The Council welcomes the emphasis on promoting literacy within the curriculum, and believes that the leisure reading material it supports complements the efforts of teachers, schools and the education consortia. The Council believes that colleges and universities also have a responsibility in this matter as they prepare students for the classroom.
- English books from Wales (both classic and contemporary) should be given a prominent position within the education curriculum to ensure that pupils in Wales are aware of their literary heritage, whilst realising the need to increase awareness amongst prospective students in our colleges and universities.
- The Council will continue to review the schemes to promote children's books – as happened recently in the case of the Book Club – together with the reading promotion schemes supported by the Welsh Government's Education Department.



9 GLOBAL MARKETS

Although the work of the Books Council is firmly rooted here in Wales, we also realise the potential of the publishing sector in presenting Wales and its people to a wider audience.

Over the centuries, our literary figures and poets have played an important role as ambassadors on behalf of Wales, and we see a new opportunity for the artists of the publishing industry to contribute yet further to this field. This could be achieved through visiting specific literary festivals, or as part of wider cultural programmes.

In preparing for the forthcoming period, the Strategic Plan is underpinned by the following:

- Although we fully appreciate the partnership role played by the Council within the publishing industry, we will give renewed attention to presenting the work of the institution itself to a wider audience.
- We believe that the investment made over a period of time in the field of English-language literature from Wales is evident in the content and design of the books produced. The next important step that we should take is to consider ways of promoting and marketing the material over the border. The obvious market to aim for in the first instance is England, Scotland and Ireland, and we will discuss with specialists in the field from amongst our network of contacts outside Wales to decide how best to achieve this aim.

- It is also important that Wales is accorded attention on the international stage, and we are strongly of the opinion that our literature has a central part to play in the wider strategy to ensure that this hope is realised. We will be eager to discuss with the Welsh Government the possibility of re-establishing a presence in the London and Frankfurt Book Fairs, the two most influential international book fairs in the context of the Welsh market.
- As in the past, we will also be seeking new opportunities to create partnerships and will collaborate with others to ensure that the culture and heritage of Wales are given attention overseas.



10 THE WELSH GOVERNMENT'S MISSION

At the beginning of this document, we have noted the Welsh Books Council's mission as a national institution that wishes to see a publishing industry which is both robust and prosperous, and which is continuously evolving and developing to enable it to meet the needs of readers.

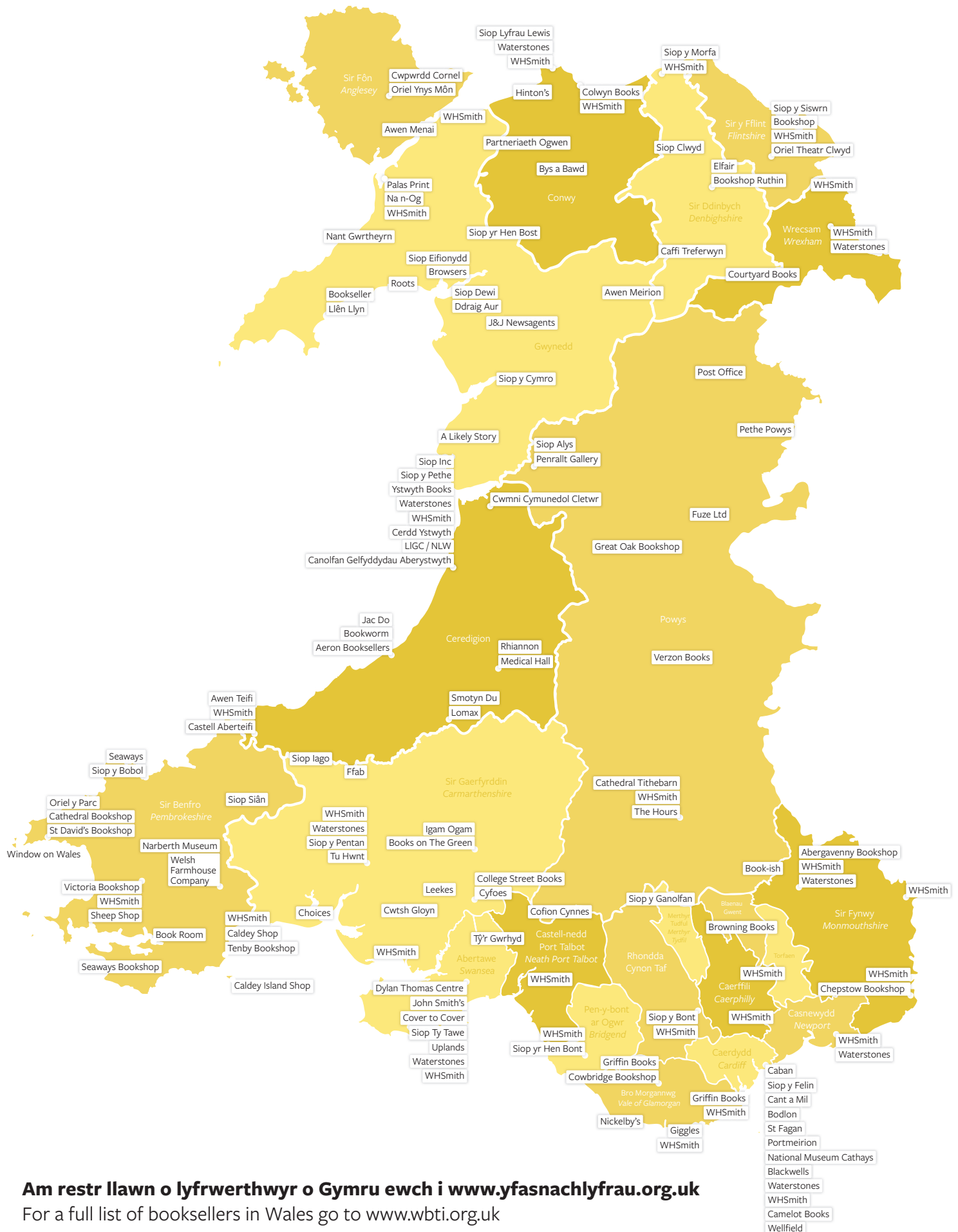
The Council is also eager to contribute to the Welsh Government's agenda and to make a contribution in a number of specific fields. The Government's recent review of support for books from Wales noted correctly that there is no reference to the Council's work in the Welsh Government's programme, but it also notes that the Council's activities contribute towards a number of fields such as the culture and heritage of Wales, maintaining and developing employment opportunities, education and the public services.

The Council believes that it contributes to the following areas:

- Presenting the Welsh culture and heritage by means of a wide range of varied reading material that presents the history of Wales and its people
- Promoting and supporting the Welsh language by presenting it as a living, relevant language
- Promoting literacy and reading as essential life skills
- Contributing to a programme to tackle poverty and deprivation through ensuring a supply of reading material which is both varied and inclusive
- Promote the health of the people of Wales and emphasising the advantages of reading for the individual's well-being
- Contributing to the Welsh economy by supporting an indigenous industry which reaches all parts of Wales
- Integrating the cultures of Wales by providing support and services for both languages
- Supporting the education sector by providing reading material which complements the educational resources supported by the Welsh Government
- Promoting Wales overseas by means of our rich literature and our prestigious authors
- Contributing to the national discourse by supporting current affairs and literary magazines and academic material
- Supporting digital material and promoting innovation in the field.



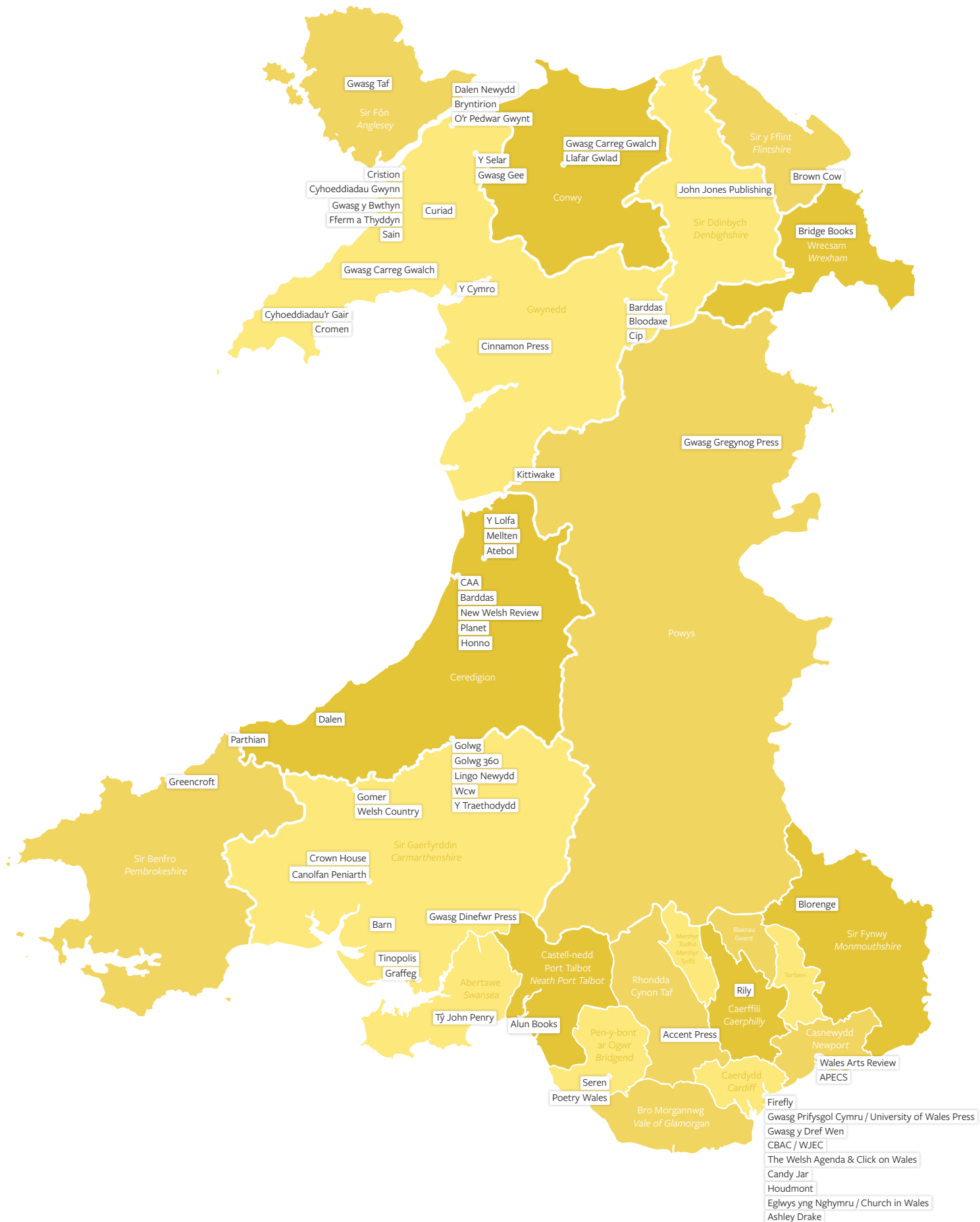
Llyfrwerthwyr yng Nghymru Booksellers in Wales



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For a full list of booksellers in Wales go to www.wbti.org.uk

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