



Buying and Reading Welsh-language Books

Analysis of market research for the Welsh Books Council

**Report
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1. Introduction and Summary

This report presents an analysis of data on buying and reading Welsh-language books collected by Beaufort Research as part of the Welsh Speakers Omnibus Survey between March 2003 and April 2006. The key findings of the analysis are:

- Welsh-language books have a substantial readership. Nearly three in ten of respondents read at least one Welsh-language book a year.
- There is a small but dedicated core of intensive readers of Welsh-language books. One in twenty respondents claimed to finish at least one Welsh-language book a week, and nearly one in eight claimed to read more than twenty Welsh-language books in a year.
- Reading patterns vary significantly by demographics, language ability, social class and geography. The most frequent readers of Welsh-language books are women, those aged over 65, in the AB social class, and fluent in Welsh speaking ability.
- Readers of Welsh-language books have eclectic tastes. Fiction is the most popular book type, but factual books, biographies and memoirs, and books for children all have significant readerships.
- The most frequent readers of Welsh-language books also read the broadest range of book types. Occasional readers tend to be more narrowly focused in the types of books that they read.
- A significant number of respondents read Welsh-language books with their children, but tend not to read Welsh-language books for themselves. Just over half of respondents who read less than one Welsh-language book a year said that they read children's books.
- Fluent Welsh speakers are likely to read more Welsh-language books if they live in the language 'stronghold' or 'core' areas than if they live elsewhere.
- Nearly twice as many women as men read books for Welsh learners.
- Just over a quarter of respondents buy Welsh-language books, but there are significant variations in book-buying habits between genders, age groups and social class, as well as between regions of Wales.
- Readers obtain Welsh-language books from a wide range of sources. Over half of the readers get books from Welsh-language bookshops, whilst libraries are the key source for readers who do not buy books. Schools and colleges are also an important source, especially for younger people.
- More than a fifth of respondents who said that they never read Welsh-language books reported buying Welsh-language books for others.

- The internet currently accounts for only a small proportion of Welsh-language book sales, but is growing in significance. Over half of the respondents have either bought a Welsh-language book over the internet, or would consider doing so,
- Respondents obtain information about Welsh-language books from a wide range of sources, with bookshops and libraries being the most significant. Frequent readers are more likely to obtain information from a wider range of sources, including the Welsh-language media.

The analysis also suggests that there is significant potential for growing and developing the market for Welsh-language books. Particularly significant opportunities exist in targeting the following groups:

- Current non-readers of Welsh-language books, especially those who describe themselves as reading Welsh 'very well'. Two out of five respondents who described themselves in this way said that they never read Welsh-language books.
- Occasional readers who finish only one Welsh-language book a year, who might be encouraged to read more.
- Parents and grandparents who read Welsh-language books with their children/grandchildren, but do not read Welsh-language books for themselves. Women aged between 25 and 45 are the key demographic group in this category.
- Consumers who buy Welsh-language books for other people, but who do not read Welsh-language books themselves.
- Fluent Welsh speakers living outside the 'stronghold' areas of mid and north-west Wales.

2. Methods

The analysis is based on market research undertaken by Beaufort Research Ltd. as part of the Welsh Speakers Omnibus Survey, using questions repeated in surveys conducted in March 2003, September 2003, March 2004, April 2005, October 2005 and April 2006.

The survey targeted a sample designed to be representative of the Welsh speaking population of Wales aged 16 and over. In each survey, 68 interviewing points were selected throughout Wales, with probability of selection proportional to the resident Welsh-speaking population, after stratification by local authority area.

For each interviewing point, interlocking quota controls of age and social class within gender were employed for the selection of respondents. Quotas were set to reflect the demographic profile of Welsh speakers and no more than one person per household was interviewed. A fresh sample was selected for each survey within substantially the same interviewing locations.

Interviews were conducted face-to-face in the homes of respondents. An initial filter question was used to ascertain whether a potential respondent was a Welsh speaker and therefore qualified for interview. A bilingual questionnaire was used and each respondent was given the choice of being interviewed in either English or Welsh.

Approximately 1,000 interviews were conducted for each survey, generating a total of 6,024 interviews across the six surveys. Just over a fifth of these were conducted wholly or mainly in Welsh (see table 2.1).

In tabulating the data collected, Beaufort Research employed a 36-cell matrix to weight the interview records, the cells being defined as age groups within gender groups within groups of counties. The targets for each cell were calculated using Census 2001 information. This produces a dataset that is proportional in terms of age, gender and geographical location to the Welsh-speaking population of Wales.

The analysis, undertaken by Aberystwyth University, has used the weighted dataset provided by Beaufort Research. Unless otherwise stated, the analysis refers to aggregate figures across all six surveys. In conducting the analysis we have made comparisons with other research on book buying and reading in Britain, particularly the report *Expanding the Market: A study of reading and buying habits in Great Britain*, produced by BML for the Arts Council of England in 2005.¹

Appendix 1 contains statistical tables, Appendix 2 defines the geographical areas used in the analysis, and Appendix 3 contains the questionnaire used.

	Total interviews	Language of interview		
		Welsh	English	Mixed
March 2003	1001	20%	73%	7%
September 2003	1014	26%	65%	7%
March 2004	979	20%	71%	8%
April 2005	1000	21%	73%	6%
October 2005	1012	17%	79%	4%
April 2006	1018	21%	71%	9%
Total	6024	21%	72%	7%

Table 2.1: Number and language of interviews for each survey
Source: Beaufort Research Ltd.

¹ I am grateful to Rhys Jones for assisting with the collation and tabulation of aggregate data and to Dr Graham Gardner for his help identifying and providing details of comparative research.

3. Reading Habits

3.1 Frequency of reading

There is a significant readership of Welsh-language books in Wales, with four out of ten people questioned by the survey reporting that they read Welsh-language books at least occasionally. Within this group is a core of avid readers, with 14% of respondents stating that they finish reading a Welsh-language book once a month or more – including 5% who claimed to read at least one Welsh-language book a week – and a similar sized cohort of occasional readers, with 15% of respondents reporting that they finished reading a Welsh-language book once a year or less (figure 3.1).

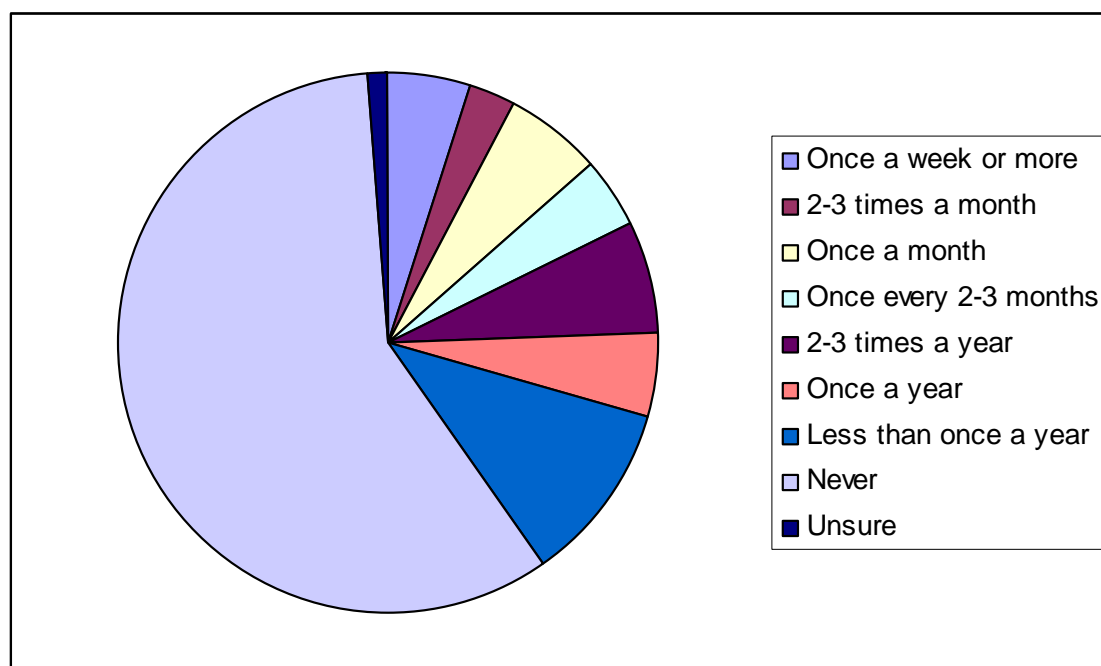


Figure 3.1: Frequency of finishing reading Welsh-language books

Marginally more women than men said that they read Welsh-language books, but there is generally little difference between genders, except among the most frequent readers. Twice as many women as men (6% to 3%) said that they finished reading a Welsh-language book once a week or more (see Appendix 1, table 1).

Respondents aged over 65 were the most likely to read Welsh-language books, and those aged between 35 and 55 the least likely, but variation in the frequency of finishing reading Welsh-language books between age groups is fairly small, and there is a gender differentiation within age groups. Women aged between 16 and 44 are the most likely to finish reading a Welsh-language book once a week or more (8%), whilst men aged between 16 and 44 are the most likely never to read a Welsh-language book (66%).

Members of the AB social class read Welsh-language books more frequently than those of other classes. 20% of respondents in the AB social class said that they finished reading a Welsh-language book once a month or more, and only 45% said that they never read a Welsh-language book. In contrast,

nearly two-thirds of respondents in the C2 social class reported that they never read a Welsh-language book, and only 11% claimed to finish a Welsh-language book at least once a month.

Access to the internet does not appear to detract from reading. Respondents with internet access were twice as likely as those without to finish a Welsh-language book at least once a week (6% to 3%), and were significantly less likely to never read a Welsh-language book (57% to 64%). This may, however, reflect class biases in internet access.

3.2 Numbers of books read

There are also significant variations in the number of Welsh-language books read by individuals over the course of a year. Of those respondents who read Welsh-language books at least occasionally, more than a quarter (28%) read ten or more Welsh-language books in a year, with 12% claiming to read over 20 books a year, and 3% claiming to read over 50 books a year. Half said that they read four or fewer books in a year, and 14% read only one Welsh-language book in a year. By comparison, a survey for the National Reading Campaign found that among British adults who had read a book in the previous year, 39% had read fewer than five books, 26% had read more than twenty books, and 11% had read more than 50 books (National Reading Campaign, 2007). The difference between these findings may be accounted for by Welsh readers also reading English-language books. The Beaufort research does not include any data on the reading habits of respondents in languages other than Welsh.

There are few gender differences in the number of books read, except that more men than women will only read one book in a year, and more women than men will read 5 or 6 books a year (figure 3.2). Respondents aged between 45 and 54 were the lightest readers. Of those who said that they read at least one Welsh-language book in a year (36%), 32% read only one or two books, whilst only 8% claimed to read more than twenty books in a year. By comparison, respondents aged between 35 and 44 were most likely to read twenty books or more in a year, 18% of those reading Welsh-language books claiming to do so (figure 3.3) (see also Appendix 1, table 2).

Significantly more female respondents aged between 16 and 44 read more than ten books in a year than male respondents in the same age group (31% of those reading Welsh-language books to 25%). Slightly more men in this age group than women read only one book a year. Gender differences between respondents aged 45 or over were less pronounced.

Access to the internet makes no significant difference to the number of books read in a year, and differences between social classes are comparatively minor.

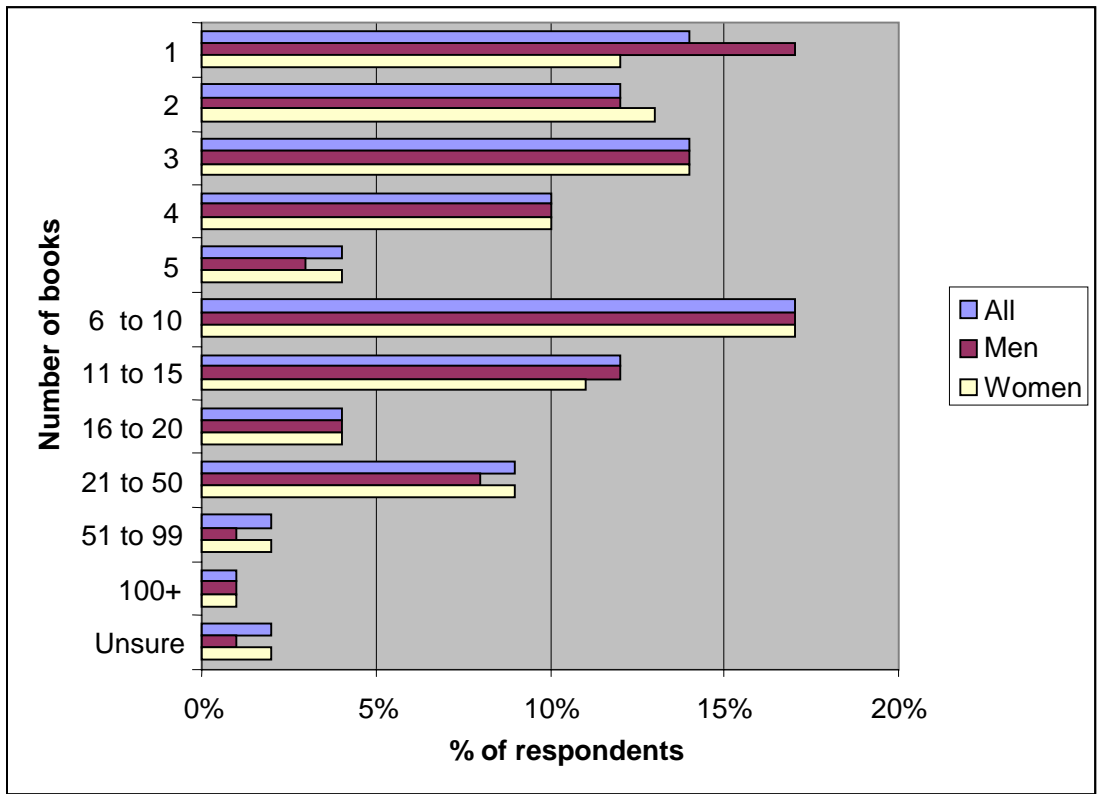


Figure 3.2: Number of Welsh-language books read in a year, by gender

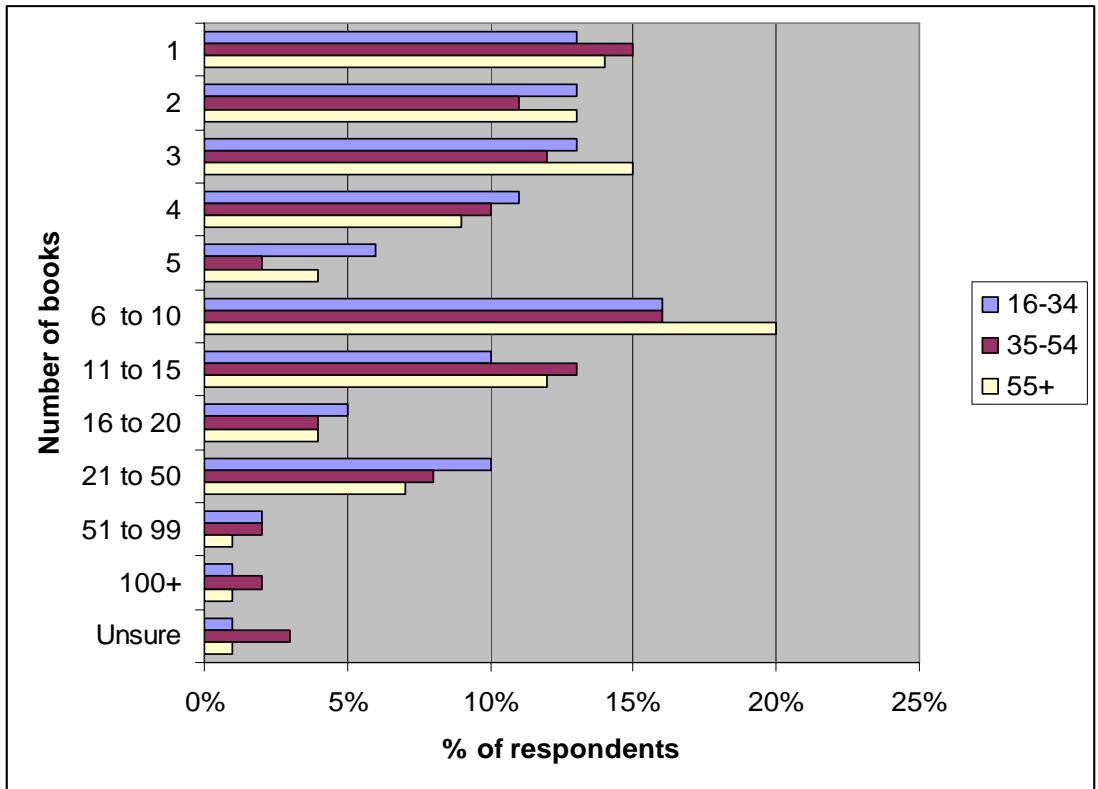


Figure 3.3: Number of Welsh-language books read in a year, by age group

3.3 Types of books read

The interests of Welsh-language readers are fairly broad and wide-ranging, but there are clear preferences for certain genres within specific consumer groups. Overall, novels are the most popular type of Welsh-language books, read by 44% of all those respondents who read Welsh contents books, followed by children's books (33%), biographies and memoirs (32%), factual books (29%), poetry (17%), books for Welsh learners (9%) and history books (2%). Novels and children's books in Welsh were significantly more widely read by women than by men. Men, in contrast, were more likely than women to read biographies and factual books (figure 3.4).

Novels are the Welsh-language books most widely read by respondents aged 16 to 24, followed by factual books. Children's books were the most widely read books by respondents aged between 25 and 45, read by 63% of respondents reading Welsh books in these age groups. In contrast, only 31% of the same respondents said that they read Welsh-language novels. This suggests that a large number of respondents are only or predominantly reading Welsh-language books to their children and not for their own enjoyment (see Appendix 1, table 3).

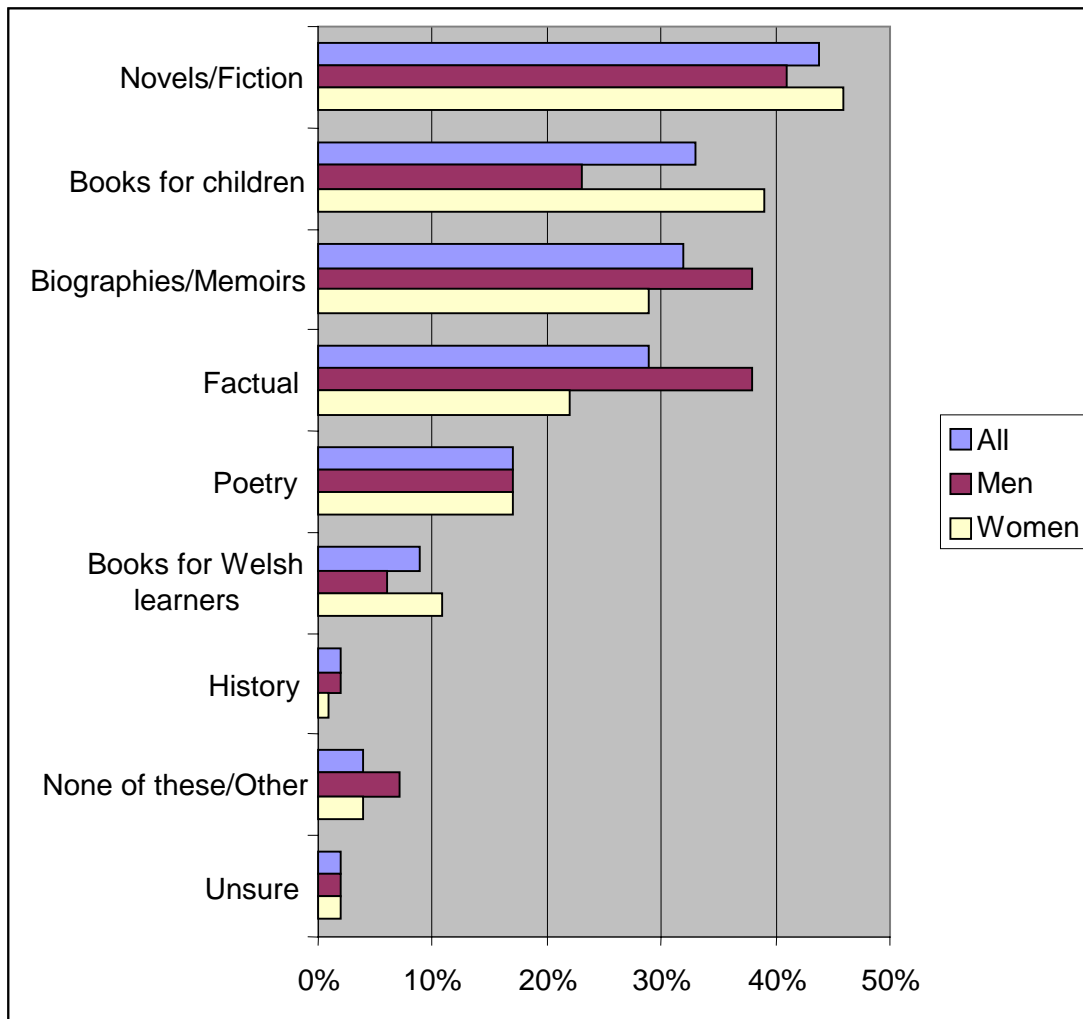


Figure 3.4: Types of Welsh-language book read, by gender

Respondents aged over 65 were the most likely to read biographies, with almost as many in this age group reading biographies as read novels (48% to 49%).

Respondents who read Welsh-language books at least once a month also have the broadest interests (figure 3.5). Of these respondents, 47% read novels, 38% read children’s books, 37% read biographies, 33% read factual books, and 24% read poetry. The less reading done by respondents, the more concentrated their reading becomes. Of those respondents who said they read Welsh books less than once a year, 51% read children’s books, significantly more than any other genre (also see Appendix 1, table 4).

Reading of poetry is especially associated with frequent readers. Nearly a quarter (24%) of those respondents who said they read a Welsh-language book at least once a month reported that they read poetry, compared to just 1% of respondents who read a Welsh-language book less than once a year.

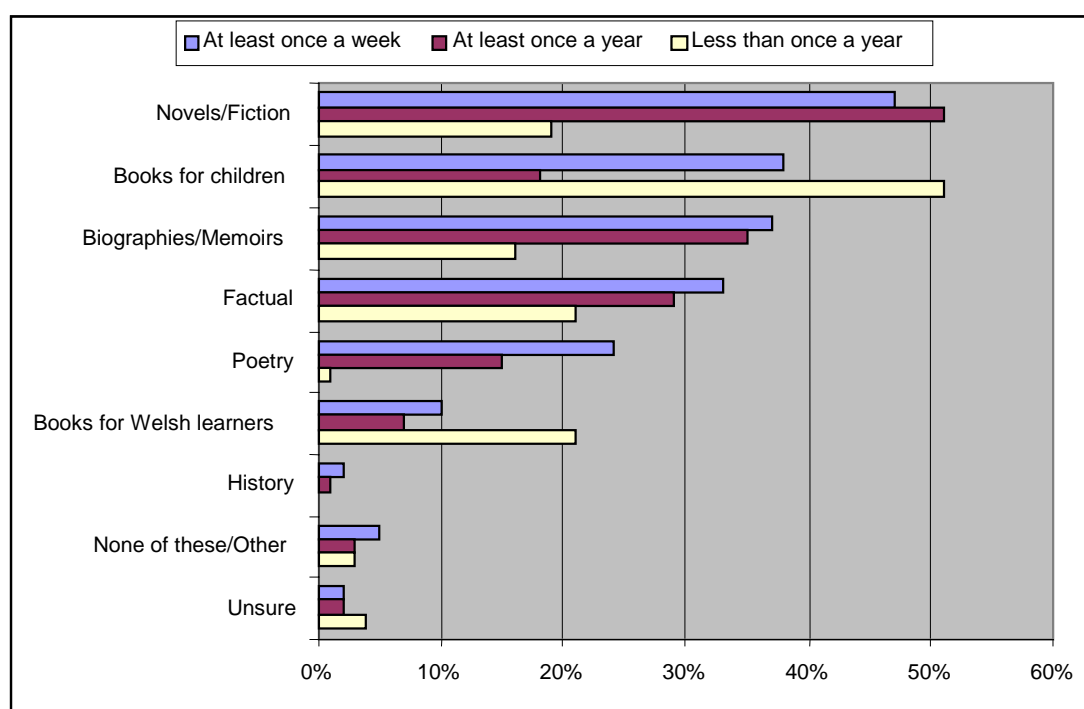


Figure 3.5: Percentage of respondents reading types of Welsh-language books, by frequency of reading Welsh-language books

4. Language Ability and Reading

4.1 Reading by Welsh speakers

There is, unsurprisingly, a strong association between Welsh-language ability and reading Welsh-language books. Those respondents who spoke Welsh fluently read Welsh-language books more frequently than those who did not, and respondents who reported that they read Welsh ‘very well’ or ‘fairly well’ read Welsh-language books more frequently than those who only read Welsh ‘a little’ (table 4.1).

However, 46% of respondents who said that they spoke Welsh fluently also claimed never to read a Welsh-language book, as did 41% of respondents reporting that they read Welsh ‘very well’ and 68% of respondents reporting that they read ‘fairly well’. This indicates that there is considerable room for expansion of the market for Welsh-language books.

	Spoken Welsh		Welsh reading ability			
	Fluent	Not fluent	Very well	Fairly well	A little	Can't read Welsh
Once a week or more	6%	3%	7%	3%	2%	0%
2-3 times a month	4%	1%	5%	2%	1%	0%
Once a month	8%	2%	10%	2%	1%	0%
Once every 2-3 months	6%	1%	6%	3%	<1%	0%
2-3 times a year	10%	2%	11%	4%	2%	0%
Once a year	6%	2%	7%	4%	1%	0%
	40%	11%	46%	18%	7%	0%
Less than once a year	13%	8%	12%	13%	10%	1%
Never	46%	80%	41%	68%	82%	98%
Unsure	1%	1%	1%	1%	1%	1%

Table 4.1: Frequency of finishing reading Welsh-language books and language ability

Conversely, 12% of non-fluent Welsh speakers and 8% of respondents reporting that they read Welsh ‘a little’ said that they read Welsh-language books at least once a year, including a very small number claiming to read a Welsh-language book once a week or more.

Of those respondents who did read at least one Welsh-language book in a year, there was surprisingly little difference in the number of books read between fluent and non-fluent Welsh speakers. Similarly, although respondents who stated that they can read Welsh ‘very well’ in general read more books than those who read Welsh ‘fairly well’ or ‘a little’, a similar proportion of all three categories claimed to read over 20 Welsh-language books a year.

Regular exposure to the everyday use of Welsh appears to have some influence on reading habits. 15% of respondents living in Welsh-language ‘core’ areas read Welsh-language books at least once a month, compared to 10% of respondents in other parts of Wales (figure 4.1). Conversely, 55% of respondents in the ‘core’ areas reported that they never read a Welsh-language book, compared to 65% in other parts of Wales. Marginally more readers in South East Wales than in other regions read at least one Welsh-language book a week, whilst 70% of respondents in South West Wales say they never read a Welsh-language book (see Appendix 1, table 6). The quantities of Welsh-language books read did not vary significantly between regions.

Respondents who speak Welsh fluently, and those who read Welsh ‘very well’, were significantly more likely than other respondents to read novels, biographies and poetry. Non-fluent Welsh speakers and respondents who

read Welsh 'a little' were, however, significantly more likely than other respondents to read children's books and books for Welsh learners (figure 4.2; also see Appendix 1, table 7).

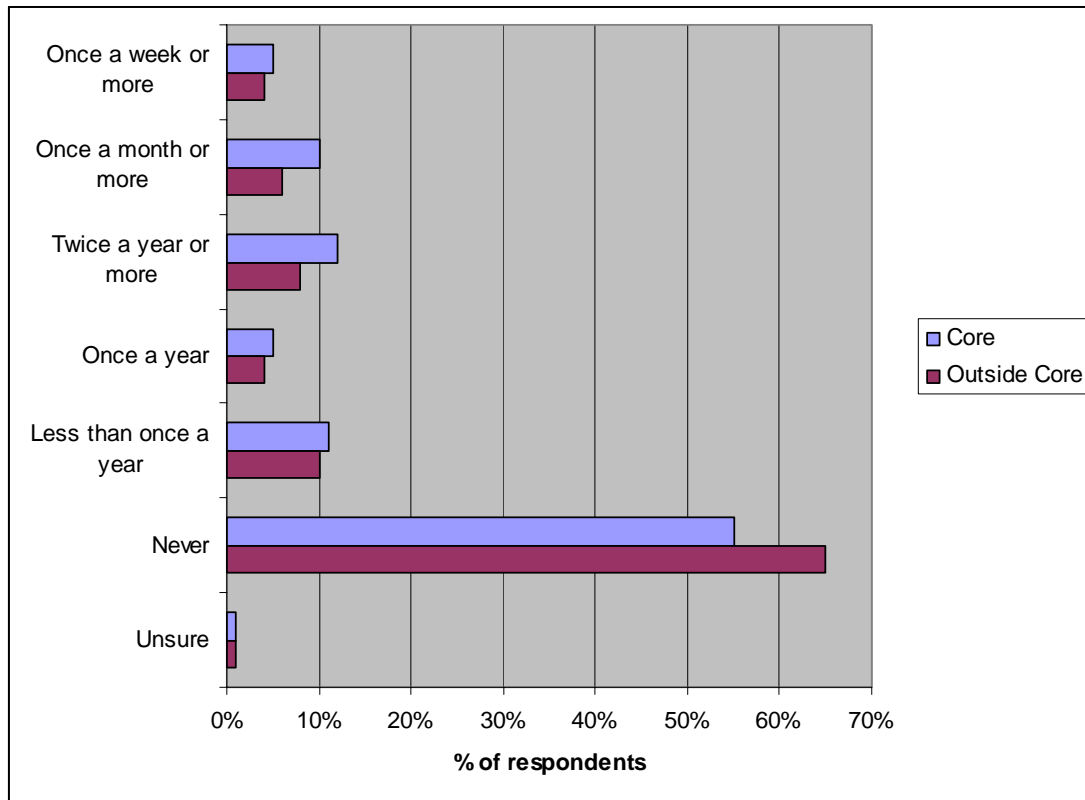


Figure 4.1: Frequency of finishing reading a Welsh-language book for respondents inside and outside the Welsh-language 'core' region.

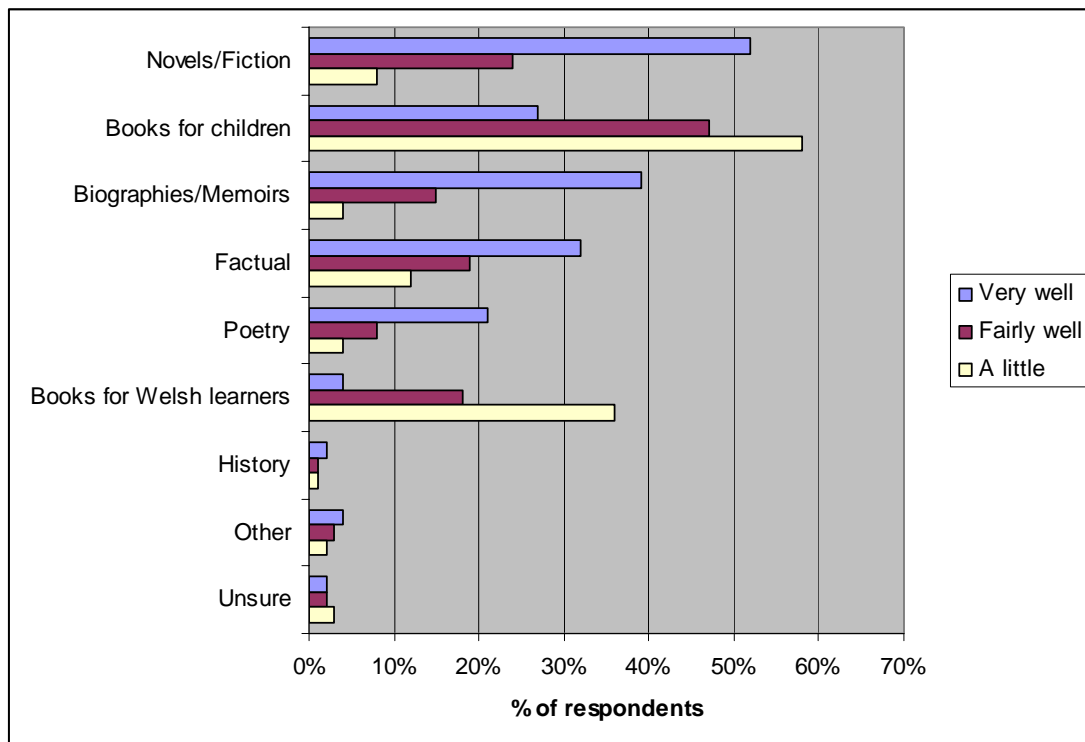


Figure 4.2: Types of Welsh-language books read by respondents, by ability to read Welsh

4.2 Books for Welsh learners

Books for Welsh learners were read by 9% of all respondents who finished at least one Welsh-language book a year, 36% of respondents who said that they read Welsh 'a little', and 33% of respondents not fluent in Welsh. Nearly a quarter (23%) of respondents who said both that they could not read Welsh and that they finished at least one Welsh book a year reported reading books for learners (62% said they read children's books).

Nearly twice as many women as men read books for Welsh learners (11% to 6%), and more respondents aged between 45 and 54 (14%) than in any other age band. There are also significant geographical variations in the reading of books for Welsh learners. These books were read by 19% of respondents in South West Wales and 17% in South East Wales, but by only 4% in North West Wales.

5. Book-buying Habits

5.1 Sources of Welsh-language books

Readers obtain Welsh-language books from a wide range of sources. Welsh-language bookshops are the most important source, used by over half of readers (56%), but libraries (38%), schools and colleges (17%) and eisteddfodau (12%) are also widely used by readers to obtain books. There is also a good circulation of Welsh-language books among readers – 17% of readers in the survey had borrowed books from friends or relatives, and 11% had received a Welsh-language book as a gift (figure 5.1) (see also Appendix 1, table 8).

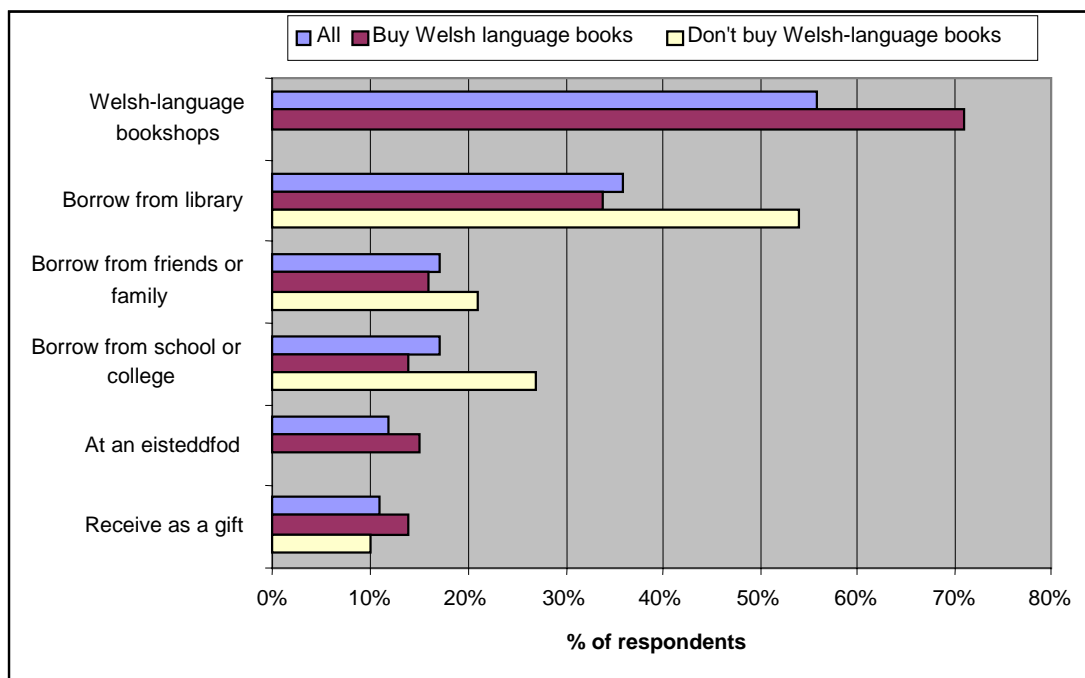


Figure 5.1: Main sources of Welsh-language books
(Respondents reading at least one Welsh book a year)

Just over a quarter of respondents to the survey (28%) said that they bought Welsh-language books. Among those respondents who read at least one

Welsh-language book a year, 43% said that they bought Welsh-language books. Over a fifth (22%) of respondents who never read Welsh-language books also reported that they bought Welsh-language books.

Most respondents who said that they buy Welsh-language books used Welsh-language bookshops (71%). Nearly one in ten (9%) bought from chain bookstores, 6% from independent English-language bookshops and 4% from supermarkets. This means that independent bookshops are significantly more important to bookselling in Welsh than they are to bookselling in English. Chain bookstores are more frequently used by buyers in south Wales and those aged over 45.

Among those respondents who do not buy Welsh-language books, local libraries are the most important source of Welsh-language books. Over half (54%) obtained books from libraries, 27% obtained books from schools and colleges, and 21% borrowed Welsh-language books from friends or family. These are significantly higher proportions than for readers who buy Welsh-language books, 34% of whom also borrowed books from libraries, with 14% apiece also obtaining books from schools or colleges or borrowing them from friends and relatives.

Nearly one in eight readers obtain Welsh-language books from eisteddfodau, although there are significant variations in this trend. The most consistent buyers of books from eisteddfodau are in North West Wales, but a higher proportion of Welsh-language books (20%) were bought from eisteddfodau in South East Wales. In particular, this figure was boosted by the hosting of the National Eisteddfod in Newport in 2004. In September 2003, before the Newport National Eisteddfod, only 14% of readers in South East Wales reported that they had bought Welsh-language books at an eisteddfod; in April 2005, after the Newport National Eisteddfod, 28% of readers in South East Wales said that they had bought Welsh-language books at an eisteddfod. People in the AB social class and those aged over 45 are also significantly more likely than others to obtain Welsh-language books from an eisteddfod.

5.2 Book-buying habits

There are significant variations in book-buying habits between different population groups (figure 5.2). Significantly more women than men buy Welsh-language books (32% to 23%). Respondents aged between 25 and 34 were most likely to buy Welsh-language books (41%), followed by those aged between 35 and 44 (36%) and those aged between 45 and 54 (32%). Only 17% of respondents aged between 16 and 24 bought Welsh-language books. 38% of respondents in social class AB bought books, compared with 21% in class DE.

To some extent these patterns reflect broader book-buying trends. Research by BML for the Arts Council of England found that 67% of those surveyed bought books, with the groups most likely to buy books being women, respondents aged 20 and 44, and respondents in class AB. However, there are some key differences. Proportionately, fewer young people aged between 20 and 24 appear to be buying Welsh-language books than buying books overall, and the gap between women and men is greater for Welsh-language books than for books generally.

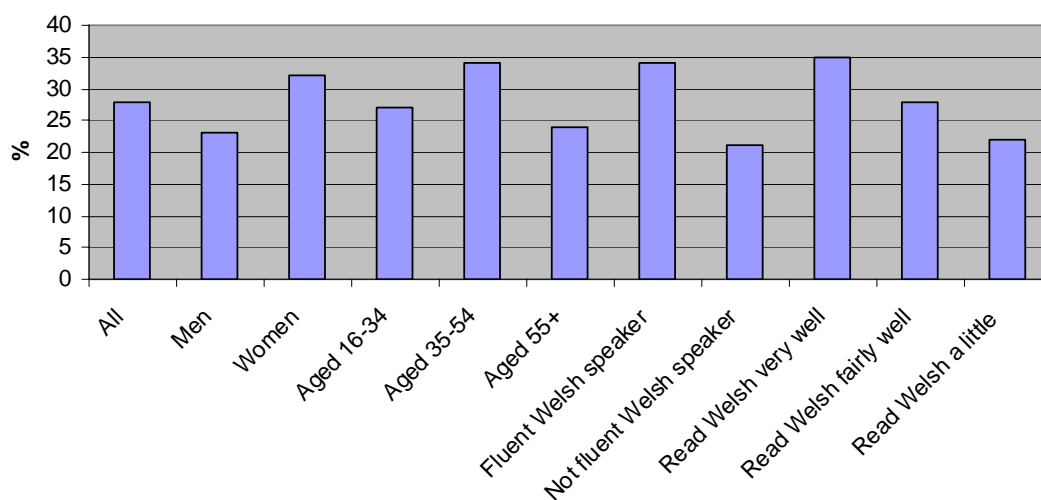


Figure 5.2: Percentage of respondents who buy Welsh-language books, by group

The highest rates of Welsh book buying are in North West Wales (35% of respondents) and North East Wales (30%), and the lowest in South West and South East Wales (19% in each). Fluent Welsh speakers are more likely to buy Welsh-language books than non-fluent speakers (34% to 21%), as are respondents who read Welsh ‘very well’ (35%).

Respondents who finish Welsh-language books more frequently are unsurprisingly also more likely to buy Welsh-language books, with 52% of respondents who finish at least one book a month reporting that they buy Welsh-language books. 36% of respondents who buy Welsh-language books said that they finish a Welsh-language book at least once a month, compared to just 13% of those who do not buy books.

Nearly two-thirds of respondents who buy Welsh-language books (63%), buy five or fewer books in a year. Only 11% bought more than ten Welsh-language books in a year. Women are more likely to buy more than one book in a year, but slightly more men buy more than ten books in a year. ‘Heavy’ book buyers, who purchase eleven or more Welsh-language books in a year, are also more likely to be aged between 35 and 44, in social class AB, speak Welsh fluently and read Welsh ‘very well’ and live in North East Wales (see Appendix 1, tables 9 and 10).

Over half (53%) of those respondents who never read Welsh-language books but buy them for others, only buy three or fewer books in a year. A quarter (26%) only buy one book a year.

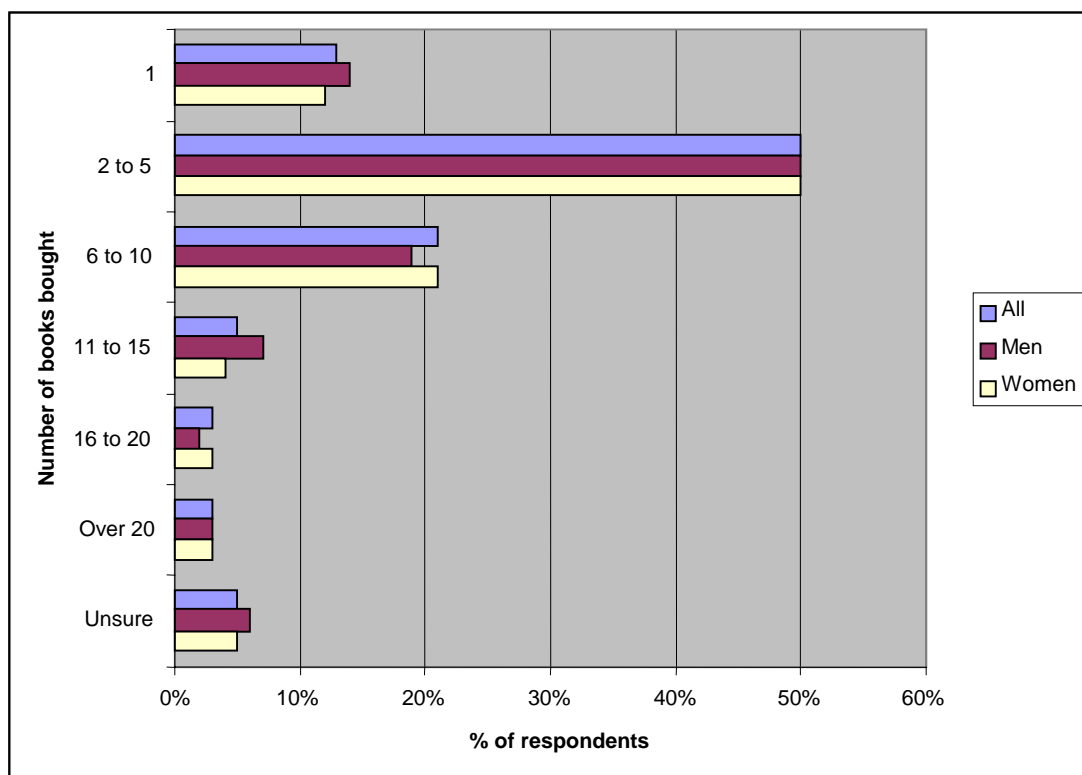


Figure 5.3: Number of Welsh-language books bought in a year
(Respondents buying at least one book a year only)

5.3 Types of books bought

The mostly commonly bought Welsh-language books are books for children (53% of respondents), followed by novels (29%), biographies (22%), factual books (21%) and poetry (11%). This suggests that a significant number of respondents who read novels, biographies and poetry in Welsh do not actually buy these books (figure 5.4).

The same proportion of men and women buy Welsh-language novels, but men are more likely to buy biographies, poetry and factual books, and women are slightly more likely to buy children's books and books for Welsh learners. Novels are most commonly bought by respondents aged between 16 and 24 and those aged over 55, whilst 75% of respondents aged between 25 and 44 buy children's books (figure 5.5) (see also Appendix 1, table 11). There is little variation in patterns of buying Welsh-language books between regions, with the exception of South East Wales, where 40% of respondents said that they buy novels, compared to 27% in the rest of Wales.

Three-quarters of respondents who never read Welsh-language books but buy them for others purchase children's books, but notable minorities also buy factual books (11%), books for Welsh learners (10%), novels (9%) and biographies (9%) (figure 5.6) (see also Appendix 1, table 12).

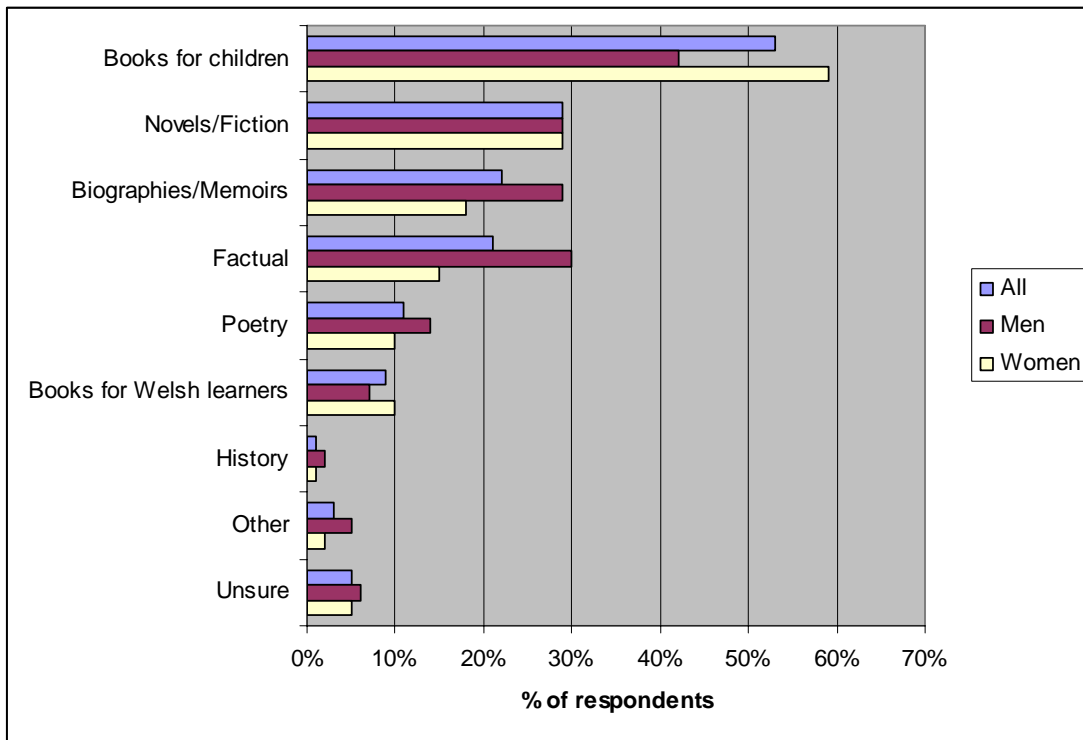


Figure 5.4: Types of Welsh-language books bought, by gender

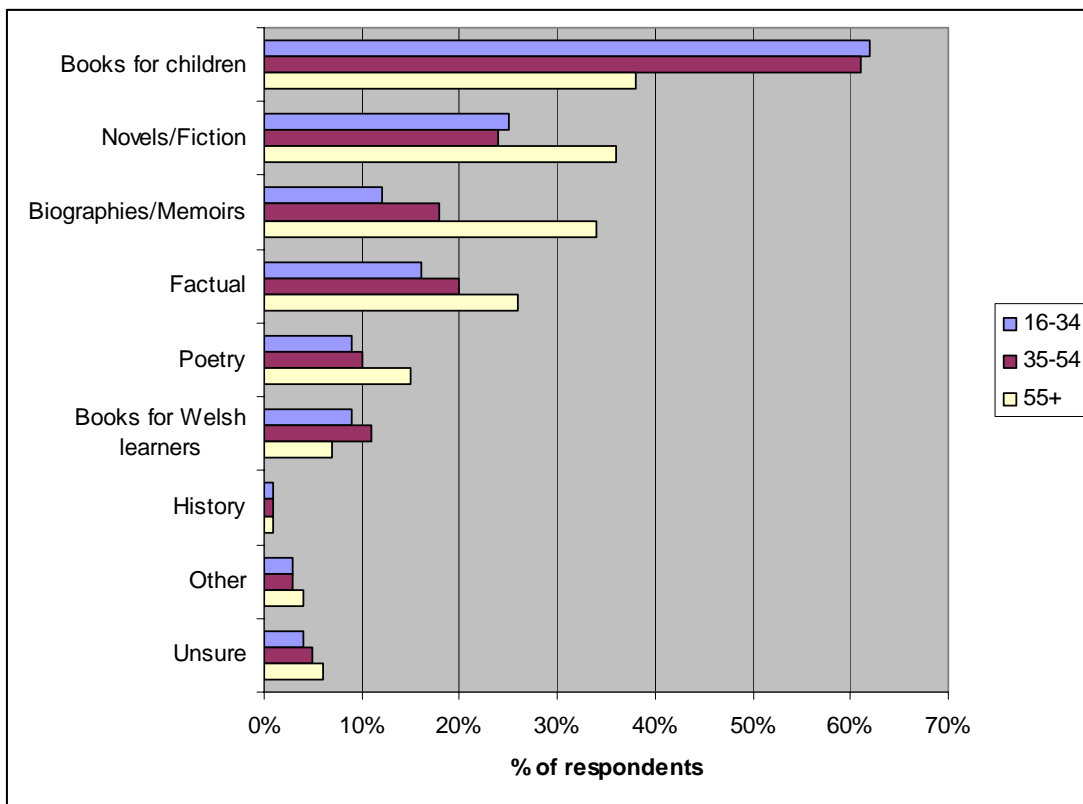


Figure 5.5: Types of Welsh-language books bought, by age group

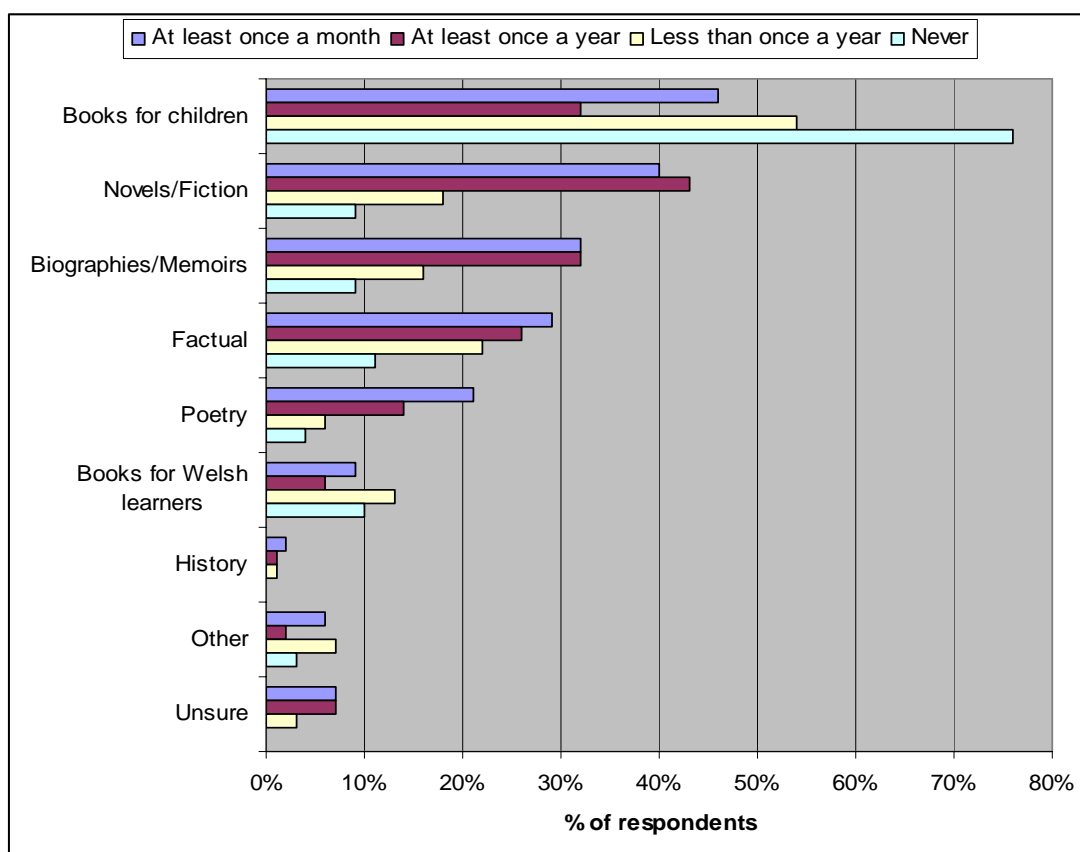


Figure 5.6: Types of Welsh-language books bought, by frequency of reading Welsh-language books

5.4 Internet sales

Although only 2% of respondents identified the internet as a source through which they obtain Welsh-language books, in a separate question 5% said that they had already used the internet to buy Welsh-language books. This figure is fairly consistent across different categories of respondent, but is higher for those in the AB class (8%) and for frequent readers (12%). Interestingly, only 4% of respondents with access to the internet said that they had bought Welsh-language books using the internet.

The proportion of respondents reporting that they had bought Welsh-language books over the internet has increased steadily through the sequence of surveys, from 3% in March 2003 to 6% in April 2006 (figure 5.7).

Overall, 37% of respondents said that they would consider buying Welsh-language books over the internet. This figure increased from 29% in the March 2003 survey to 42% in the April 2006 survey. The groups most willing to consider buying over the internet are frequent readers (48%), respondents aged between 25 and 34 (45%) and those in South East Wales (43%). Of respondents who buy Welsh-language books, 9% have already used the internet to buy books, and 47% would consider doing so.

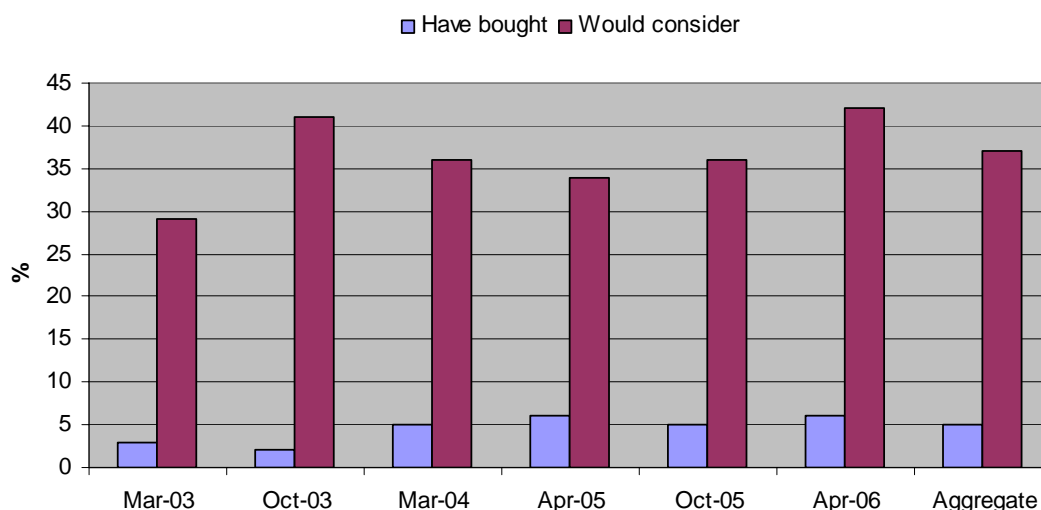


Figure 5.7: Respondents who said that they had bought, or would consider buying, Welsh-language books over the internet, by survey date

6. Sources of Information about Welsh-language books

The most frequent sources of information about Welsh-language books are bookshops (29%) and libraries (22%). Papurau bro were cited as a source of information by 9% of respondents (particularly in North West Wales), S4C by 9% and Radio Cymru by 6%. Friends and families were sources of information for 15% of respondents, and schools and colleges for 14%. No other information source was cited by more than 5% of respondents (figure 6.1).

Media including the *Western Mail*, *Golwg* and local newspapers were also sources for 9% or more of respondents in the AB class, who were also significantly more likely than average to get information from S4C (16%) and Radio Cymru (14%) (see Appendix 1, table 13).

Frequent readers and those buying Welsh-language books are more likely to get information from a wider range of sources. *Golwg* in particular stands out as a source of information for 15% of respondents finishing more than one Welsh-language book a month, compared with just 4% of all respondents.

In contrast, respondents who read fewer than six Welsh-language books in a year were more likely than the average reader to get information from bookshops (34%) or libraries (24%). Moreover, 13% of all respondents said that they did not want any information about Welsh-language books, including 39% of respondents who never buy Welsh-language books. However, this figure also means that nearly two-thirds of respondents who do not currently buy Welsh-language books are interested in obtaining information about them and may indicate a potential for market growth.

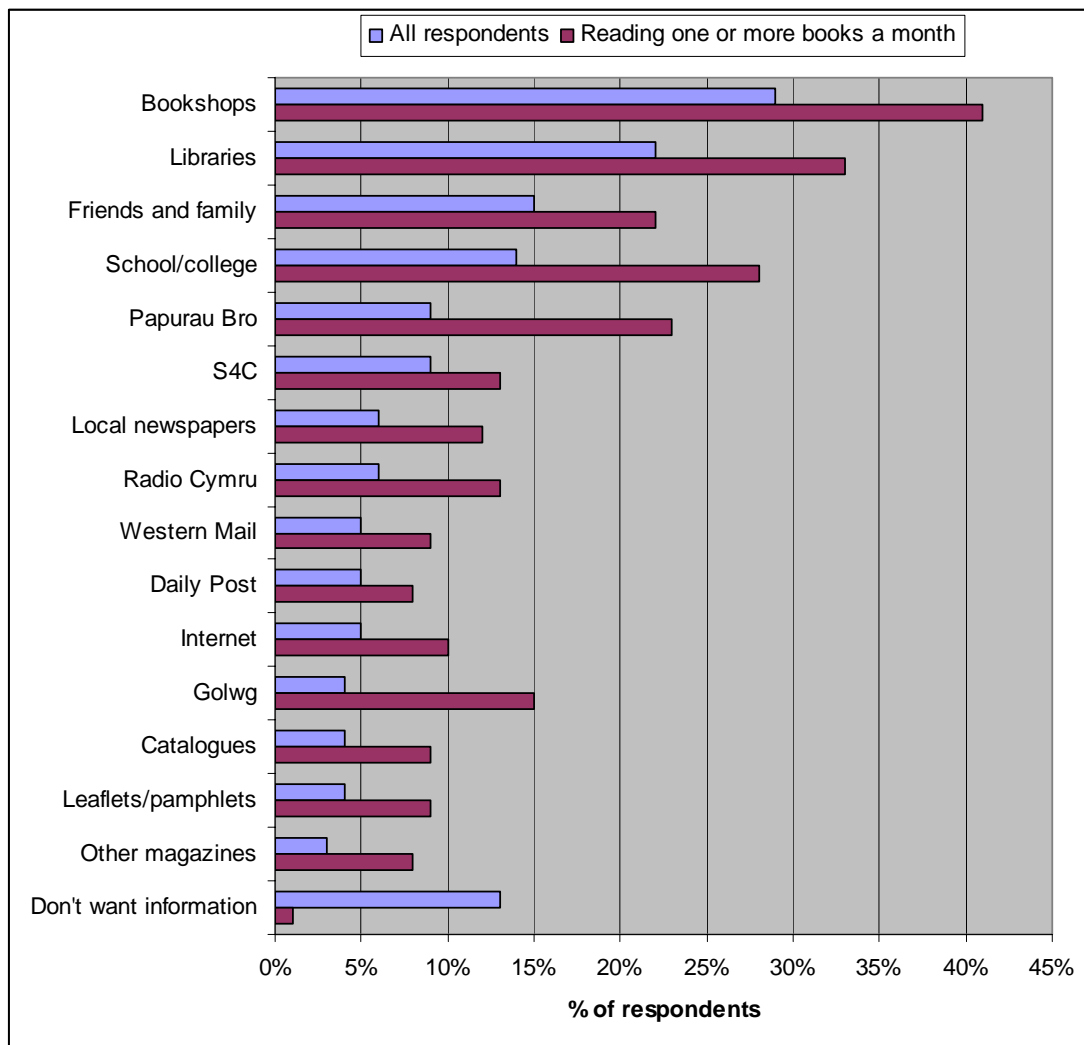


Figure 6.1: Main sources of information about Welsh-language books

References

BML (2005) *Expanding the Market: A study of reading and buying habits in Great Britain*, Report for the Arts Council of England.

National Literacy Trust (2007) *National Reading Campaign, Reading Habits, Research and Statistics*, available at www.literacytrust.org.uk

STATISTICAL TABLES

	All	Gender		Age		
		Men	Women	16-34	35-54	55+
Once a week or more	5%	3%	6%	5%	5%	4%
2-3 times a month	3%	3%	3%	3%	2%	4%
Once a month	6%	6%	5%	5%	5%	6%
Once every 2-3 months	4%	3%	4%	4%	3%	4%
2-3 times a year	7%	6%	7%	6%	5%	8%
Once a year	<u>5%</u>	<u>5%</u>	<u>5%</u>	<u>4%</u>	<u>4%</u>	<u>5%</u>
	30%	26%	30%	27%	24%	31%
Less than once a year	11%	11%	11%	11%	10%	12%
Never	60%	63%	58%	61%	64%	56%
Unsure	1%	1%	1%	1%	1%	1%

Table 1: Frequency of finishing reading Welsh-language books

	All	Gender		Age		
		Men	Women	16-34	35-54	55+
1	14%	17%	12%	13%	15%	14%
2	12%	12%	13%	13%	11%	13%
3	14%	14%	14%	13%	12%	15%
4	10%	10%	10%	11%	10%	9%
5	4%	3%	4%	6%	2%	4%
6	7%	5%	9%	5%	8%	9%
7	1%	1%	1%	1%	1%	1%
8	2%	2%	2%	2%	1%	3%
9	1%	2%	<1%	2%	1%	1%
10	6%	7%	5%	6%	5%	6%
11 to 15	12%	12%	11%	10%	13%	12%
16 to 20	4%	4%	4%	5%	4%	4%
21 to 50	9%	8%	9%	10%	8%	7%
51 to 99	2%	1%	2%	2%	2%	1%
100 +	1%	1%	1%	1%	2%	1%
Unsure	2%	1%	2%	1%	3%	1%

Table 2: Number of Welsh-language books read in a year

	All	Gender		Age		
		Men	Women	16-34	35-54	55+
Novels/Fiction	44%	41%	46%	45%	37%	48%
Books for children	33%	23%	39%	43%	46%	17%
Biographies/Memoirs	32%	38%	29%	19%	27%	45%
Factual	29%	38%	22%	25%	25%	33%
Poetry	17%	17%	17%	16%	13%	21%
Books for Welsh learners	9%	6%	11%	10%	13%	6%
History	2%	2%	1%	1%	2%	2%
Other	4%	6%	2%	3%	1%	4%
Unsure	2%	2%	2%	2%	2%	3%

Table 3: Types of Welsh-language books read, by gender and age group

	Frequency of reading Welsh-language books		
	At least once a month	At least once a year	Less than once a year
Novels/Fiction	47%	51%	19%
Books for children	38%	18%	51%
Biographies/Memoirs	37%	35%	16%
Factual	33%	29%	21%
Poetry	24%	15%	1%
Books for Welsh learners	10%	7%	21%
History	2%	1%	0%
Other	5%	3%	3%
Unsure	2%	2%	4%

Table 4: Types of Welsh-language books read, by frequency of reading Welsh-language books

	Spoken Welsh		Welsh reading ability			
	Fluent	Not fluent	Very well	Fairly well	A little	Can't read Welsh
Once a week or more	6%	3%	7%	3%	2%	0%
2-3 times a month	4%	1%	5%	2%	1%	0%
Once a month	8%	2%	10%	2%	1%	0%
Once every 2-3 months	6%	1%	6%	3%	<1%	0%
2-3 times a year	10%	2%	11%	4%	2%	0%
Once a year	<u>6%</u>	<u>2%</u>	<u>7%</u>	<u>4%</u>	<u>1%</u>	<u>0%</u>
	40%	11%	46%	18%	7%	0%
Less than once a year	13%	8%	12%	13%	10%	1%
Never	46%	80%	41%	68%	82%	98%
Unsure	1%	1%	1%	1%	1%	1%

Table 5: Frequency of finishing reading Welsh-language books and language ability

	North East	North West	Mid & West	South West	South East	Core	Outside Core
Once a week or more	4%	5%	5%	4%	6%	5%	4%
2-3 times a month	2%	4%	3%	1%	4%	4%	2%
Once a month	3%	7%	6%	3%	5%	6%	4%
Once every 2-3 months	4%	4%	4%	3%	4%	4%	3%
2-3 times a year	5%	8%	7%	6%	6%	8%	5%
Once a year	<u>4%</u>	<u>5%</u>	<u>5%</u>	<u>3%</u>	<u>4%</u>	<u>5%</u>	<u>4%</u>
	22%	33%	30%	20%	29%	32%	22%
Less than once a year	12%	11%	11%	10%	11%	11%	10%
Never	65%	56%	60%	70%	59%	55%	65%
Unsure	1%	<1%	<1%	<1%	1%	1%	1%

Table 6: Frequency of finishing reading a Welsh-language book, by region

	Spoken Welsh		Welsh reading ability			
	Fluent	Not fluent	Very well	Fairly well	A little	Can't read Welsh
Novels/Fiction	50%	15%	52%	24%	8%	8%
Books for children	28%	55%	27%	47%	58%	62%
Biographies/Memoirs	38%	8%	39%	15%	4%	0%
Factual	32%	12%	32%	19%	12%	0%
Poetry	20%	6%	21%	8%	4%	0%
Books for Welsh learners	4%	33%	4%	18%	36%	23%
History	2%	1%	2%	<1%	<1%	0%
None of these	<1%	<1%	<1%	<1%	<1%	8%
Other	4%	3%	4%	3%	2%	0%
Unsure	2%	3%	2%	2%	3%	0%

Table 7: Types of books read, by language ability

	All	Buy Welsh-language books	Don't buy Welsh-language books
Welsh-language bookshops	56%	71%	0%
Borrow from library	36%	34%	54%
Borrow from friends or family	17%	16%	21%
Borrow from school or college	17%	14%	27%
At an Eisteddfod	12%	15%	0%
Receive as a gift	11%	14%	10%
Chain bookstore	7%	9%	0%
Independent English-language bookshops	4%	6%	0%
Supermarket	3%	4%	0%
Book club	3%	4%	0%
Second-hand bookshop / charity shop / car boot sale	2%	2%	2%
Over the internet	2%	3%	0%
Newsagents/ local shop	1%	1%	1%
Over the phone	<1%	1%	0%
From a press catalogue	<1%	<1%	0%
Others	2%	1%	1%

Table 8: Sources of Welsh-language books
(Respondents reading at least one Welsh-language book a year)

	All	Gender		Age		
		Men	Women	16-34	35-54	55+
1	13%	14%	12%	15%	12%	13%
2	20%	22%	19%	19%	20%	21%
3	12%	12%	12%	10%	12%	13%
4	11%	10%	12%	13%	9%	12%
5	7%	6%	7%	9%	6%	6%
6	10%	9%	10%	7%	11%	11%
7	1%	1%	1%	1%	1%	1%
8	2%	1%	2%	2%	1%	2%
9	1%	1%	<1%	1%	<1%	1%
10	7%	7%	8%	9%	9%	5%
11 to 15	5%	7%	4%	4%	6%	6%
16 to 20	3%	2%	3%	3%	3%	2%
21 to 50	3%	3%	3%	2%	4%	2%
51 to 99	<1%	<1%	<1%	1%	<1%	<1%
100 +	<1%	<1%	<1%	0%	<1%	<1%
Unsure	5%	6%	5%	3%	3%	3%

Table 9: Number of Welsh-language books bought in a year, by age and gender (Respondents who buy books only)

	Social Class		Speak Welsh		Read Welsh		
	ABC1	C2DE	Fluent	Not fluent	Very well	Fairly well	A little
1	14%	12%	11%	18%	10%	15%	23%
2	19%	22%	17%	28%	17%	26%	28%
3	12%	12%	12%	11%	12%	14%	10%
4	10%	13%	11%	12%	11%	12%	11%
5	7%	6%	6%	7%	7%	6%	7%
6	9%	10%	11%	7%	11%	7%	7%
7	1%	1%	1%	1%	1%	0%	1%
8	2%	2%	2%	1%	2%	1%	<1%
9	1%	1%	<1%	1%	1%	<1%	0%
10	8%	7%	9%	4%	9%	6%	3%
11 to 15	7%	4%	6%	3%	6%	3%	3%
16 to 20	3%	2%	3%	1%	3%	1%	<1%
21 to 50	3%	2%	3%	1%	4%	1%	1%
51 to 99	<1%	<1%	<1%	<1%	<1%	<1%	0%
100 +	<1%	0%	<1%	<1%	<1%	<1%	0%
Unsure	5%	6%	5%	6%	5%	4%	5%

Table 10: Number of Welsh-language books bought in a year, by social class and language ability (Respondents who buy books only)

	All	Gender		16-34	Age	
		Men	Women		35-54	55+
Books for children	53%	42%	59%	62%	61%	38%
Novels/Fiction	29%	29%	29%	25%	24%	36%
Biographies/Memoirs	22%	29%	18%	12%	18%	34%
Factual	21%	30%	15%	16%	20%	26%
Poetry	11%	14%	10%	9%	10%	15%
Books for Welsh learners	9%	7%	10%	9%	11%	7%
History	1%	2%	<1%	1%	1%	1%
None of these	<1%	<1%	<1%	<1%	<1%	<1%
Other	3%	5%	2%	3%	3%	4%
Unsure	5%	6%	5%	4%	5%	6%

Table 11: Percentage of respondents, by age group and gender, buying types of Welsh-language books

	Frequency of reading Welsh-language books			
	At least once a month	At least once a year	Less than once a year	Never
Novels/Fiction	46%	32%	54%	76%
Books for children	40%	43%	18%	9%
Biographies/Memoirs	32%	32%	16%	9%
Factual	29%	26%	22%	11%
Poetry	21%	14%	6%	4%
Books for Welsh learners	9%	6%	13%	10%
History	2%	1%	1%	0%
Other	6%	2%	7%	3%
Unsure	7%	7%	3%	0%


Table 12: Percentage of respondents, by frequency of reading Welsh-language books, buying types of Welsh-language books.

	Social Class			Welsh book reading frequency		
	All	ABC1	C2DE	>1 per month	<6 per year	Never
Papurau bro	9%	11%	7%	23%	10%	3%
Local newspapers	6%	8%	6%	12%	9%	4%
Y Cymro	3%	4%	2%	10%	1%	1%
Western Mail	5%	7%	3%	9%	7%	2%
Daily Post	5%	6%	4%	8%	5%	3%
Other newspapers	3%	3%	2%	4%	4%	2%
Golwg	4%	7%	2%	2%	2%	1%
Other magazines	3%	4%	2%	8%	5%	1%
Catalogues	4%	6%	2%	9%	6%	2%
Leaflets / pamphlets	4%	5%	3%	9%	7%	3%
Through the post	1%	2%	1%	4%	1%	1%
Bookshops	29%	33%	26%	41%	39%	20%
Libraries	22%	23%	20%	33%	25%	14%
S4C / S4C Digital	9%	12%	7%	13%	12%	3%
Other TV channels	1%	1%	1%	3%	3%	1%
Radio Cymru	6%	7%	6%	13%	6%	2%
Other radio stations	1%	1%	1%	2%	3%	1%
Internet	5%	7%	3%	10%	8%	5%
School / college	14%	16%	11%	28%	13%	9%
Friends & family	15%	18%	13%	22%	17%	7%
Market / Car boot sale	<1%	<1%	<1%	1%	<1%	<1%
At Eisteddfod	<1%	1%	<1%	1%	1%	<1%
At club/lessons/choir	<1%	<1%	<1%	<1%	1%	<1%
At work	<1%	1%	<1%	1%	1%	<1%
Welsh Books Council	<1%	<1%	<1%	1%	0%	<1%
Other	1%	1%	1%	2%	1%	1%
None available	5%	4%	7%	<1%	1%	1%
Don't want information	13%	11%	15%	1%	11%	36%
Don't know	10%	7%	12%	3%	8%	13%

Table 13: Sources of information about Welsh-language books

GEOGRAPHICAL AREAS

AREA	Unitary Authority
North East	Wrexham, Flintshire, Denbighshire
North West	Conwy, Anglesey, Gwynedd
Mid / West	Powys, Ceredigion, Carmarthenshire, Pembrokeshire
South West	Swansea, Neath & Port Talbot, Bridgend
South East	Rhondda CT, Merthyr, Caerphilly, Blaenau Gwent, Torfaen, Monmouth, Newport, Vale of Glamorgan, Cardiff
AREA	Unitary Authority
Welsh Speaking Heartlands	Anglesey, Gwynedd, Ceredigion, Carmarthenshire
Other areas	Wrexham, Flintshire, Denbighshire, Conwy, Powys, Pembrokeshire, Swansea, Neath & Port Talbot, Bridgend, Rhondda CT, Merthyr, Caerphilly, Blaenau Gwent, Torfaen, Monmouth, Newport, Vale of Glamorgan, Cardiff

	AROLWG OMNIBWS O SIARADWYR CYMRAEG	FOR OFFICE USE ONLY	
	HYDREF 2005 B2650-1		
		Case No.	Point Number (1/2)

ASK PERSONS AGED 16 AND OVER WHO LIVE IN THE AREA. (CHECK QUOTA)

Bore/prynhawn/noswaith dda. Rwy'n gweithio i Beaufort Research, asiantaeth ymchwil cymdeithasol sy'n cynnal arolwg ar amrywiaeth eang o bynciau ledled Cymru.

Good morning/afternoon/evening. I'm working for Beaufort Research, a consumer research agency who are conducting a survey on a wide range of different topics all over Wales.

FILTER QUESTIONS

RQ.1a) **A ydych chi'n siarad Cymraeg?**

- | | | | |
|-----|---|-----|------------|
| b) | <u>IF YES:</u> <i>A ydych chi'n rhugl?</i> | (3) | |
| | YES, fluently | 1 | } CONTINUE |
| (H) | YES, not fluently | 2 | |
| | NO | 3 | |

Mae gen i'r cwestiynau yn Saesneg ac yn Gymraeg. Pa iaith fyddai orau gennych ar gyfer y cyfweiliad?

- | | | | |
|-----|-----------------------|-----|--------|
| | | (4) | |
| | Prefer English | 1 | } RQ.2 |
| (H) | Prefer Welsh | 2 | |
| | Don't know/Don't mind | 3 | |

CONTINUE IN RESPONDENT'S PREFERRED LANGUAGE (IF CODE 3 ABOVE, START INTERVIEW IN ENGLISH)
IF START INTERVIEW IN WELSH BUT ENCOUNTER DIFFICULTIES PLEASE CONTINUE IN ENGLISH

RQ.2 *A oes gennych chi neu unrhyw aelodau o'ch teulu gysylltiad â'r cyfryngau neu'r diwydiant darlledu?*
Are you yourself or any members of your family associated with the media or broadcasting industry?

- | | | |
|-----|--------|----------------------------|
| YES | —————→ | CLOSE. DO NOT MARK FORM |
| NO | —————→ | CONTINUE. RECRUIT TO QUOTA |

CONTINUE WITH MAIN INTERVIEW IN PREFERRED LANGUAGE

SHOW CARD A

Q.1 **Tua pha mor aml y dyddiau hyn rydych yn gorffen darllen llyfr yn y Gymraeg? Defnyddiwch y cerdyn hwn i'ch helpu i ateb.**

About how often these days do you finish reading a book or paperback in the Welsh language? Please use this card to help you answer.

SINGLE CODE ONLY

(CLI)

Once a week or more often

2 / 3 times a month

Once a month

Once every 2 / 3 months

2 / 3 times a year

Once a year

Less often

Never

Don't know

(60)

1

2

3

4

5

6

7

8

9

Q.2

Q.5

ASK ALL WHO READ A BOOK AT LEAST ONCE A YEAR (CODE 1-6 AT Q.1).

OTHERS GO TO Q.5

Q.2 **Ar gyfartaledd, faint o lyfrau Cymraeg rydych yn eu darllen mewn blwyddyn?**

On average, how many Welsh language books do you read in a year?

WRITE IN ANSWER USING LEADING ZERO

(CLI)

--	--

(61) (62)

SHOW CARD B

Q.3 *Defnyddiwch y cerdyn hwn i'ch helpu chi i ateb pa fath o lyfrau Cymraeg rydych wedi'u darllen dros y flwyddyn ddiwethaf? Unrhyw rai eraill?*

Please use this card to help you answer what types of Welsh language books you have read over the last year? Any other types?

CODE ALL MENTIONED

(CLI)

Novels / Fiction

Biographies / Autobiographies

Poetry

Factual books

Books for Welsh learners

Books for children (reading with a child)

Other (PLEASE SPECIFY)

Don't know

1

2

3

4

5

6

x

N

(63-66m)

SHOW CARD C

Q.4 *O ble rydych yn cael eich llyfrau Cymraeg? Pa lefydd eraill? Unrhyw le arall?*
 From where do you get your Welsh language books? What other source? Anywhere else?
 CODE ALL MENTIONED

- (CLI) Buy from Welsh bookshop (either for oneself or a present)
 Buy from English language independent bookshop (either for oneself or a present)
 Buy from large/chain book stores (either for oneself or a present)
 Buy from supermarkets (either for oneself or a present)
 Buy over the internet (either for oneself or a present)
 Buy over the phone (either for oneself or a present)
 Buy through a book club (either for oneself or a present)
 Buy at an Eisteddfod (Urdd, National or other) (either for oneself or a present)
 Borrow from library
 Borrow from friends/family
 Borrow from college / school
 Receive as present
 Other (PLEASE SPECIFY)

 Don't know

(70-73m)

1 }
 2 }
 3 }
 4 } If any
 5 } mentioned, c
 6 } to Q.7
 7 }
 8 }
 9 }
 A }
 B }
 C }
 x }
 N }

ASK ALL WHO READ A BOOK LESS OFTEN THAN ONCE A YEAR OR WHO DID NOT MENTION CODES 1-8 AT Q.4.

Q.5 Fyddwch chi yn prynu llyfrau Cymraeg, un ai i chi eich hun neu i eraill?
Can I just check, do you ever buy Welsh language books, either for yourself or for others?
 (CLI) Yes
 No

(74)
 1 → Q.6
 2 → Q.9

ASK IF YES AT Q.5

SHOW CARD D

Q.6 O ble rydych yn eu prynu? Unrhyw le arall?
 Where do you buy them from? Anywhere else?

- (CLI) CODE ALL MENTIONED
 Buy from Welsh bookshop (either for oneself or a present)
 Buy from English language independent bookshop (either for oneself or a present)
 Buy from large/chain book stores (either for oneself or a present)
 Buy from supermarkets (either for oneself or a present)
 Buy over the internet (either for oneself or a present)
 Buy over the phone (either for oneself or a present)
 Buy through a book club (either for oneself or a present)
 Buy at an Eisteddfod (Urdd, National or other) (either for oneself or a present)
 Other (PLEASE SPECIFY)

 Don't know

(75-78m)
 1
 2
 3
 4
 5
 6
 7
 8
 x
 N

ASK ALL WHO EVER BUYS BOOKS (CODES 1-8 AT Q.4 OR YES AT Q.5). OTHERS GO TO Q.9

Q.7 Ar gyfartaledd, faint o lyfrau Cymraeg rydych yn eu prynu mewn blwyddyn?
 On average, how many Welsh language books do you buy in a year?
 WRITE IN ANSWER USING LEADING ZERO

(79) (80)

(CLI)

--	--

SHOW CARD E

Q.8 *Defnyddiwch y cerdyn hwn i'ch helpu chi i ateb pa fath o lyfrau Cymraeg rydych wedi'u prynu dros y flwyddyn ddiwethaf? Unrhyw rai eraill?*

Please use this card to help you answer what types of Welsh language books you have bought over the last year? Any other types?

CODE ALL MENTIONED

(CLI)

Novels / Fiction	1
Biographies / Autobiographies	2
Poetry	3
----- Factual books	4
Books for Welsh learners	5
Books for children	6
Other (PLEASE SPECIFY)	x

Don't know	N

(81-84m)

ASK ALL

Q.9 **A oes gennych fynediad i'r rhyngwrwd, naill ai gartref, yn y gwaith neu rywle arall?**

Do you have access to the internet, either at home, work or somewhere else?

CODE ALL MENTIONED

(CLI)

Yes, at home	1	} Q.10
Yes, at work	2	
Yes, at college where I study	3	
Yes, at college (not where I study)	4	
Yes, at library	5	
Yes, at cybercafe	6	
Yes, somewhere else (please specify)	X	

No access to internet	N	} Q.11

(85-88m)

ASK IF HAVE ACCESS TO THE INTERNET

Q.10 **A fydddech yn ystyried archebu llyfr Cymraeg dros y we?**

Would you consider ordering a Welsh language book over the internet?

SINGLE CODE ONLY

(CLI)

Already do so / have done so	1
Yes	2
No	3
Don't know / Not sure	4

(89)

SHOW CARD F

ASK ALL

Q.11 O ble, os unrhyw le o gwbl, rydych yn cael gwybodaeth am lyfrau Cymraeg? Unrhyw le arall?

GOFYNNWCH OS Y BO ANGEN: Sut rydych yn cael clywed am lyfrau Cymraeg?

Where, if anywhere at all, do you get your information about Welsh language books? Anywhere else?
 PROMPT IF NECESSARY: Where do you get to hear about Welsh language books?

CODE ALL MENTIONED

(90-93m)

(CLI)

<u>PAPERS:</u>	Papurau Bro	1
	Local newspapers	2
	Y Cymro	3
	The Western Mail	4
	Daily Post	5
	Other newspapers	6
<u>MAGAZINES:</u>	Golwg	7
	Other magazines	8
	Catalogues	9
	Leaflets / Posters	A
	Through the post	B
<u>SHOPS/LIBRARY:</u>	Bookshop	C
	Library	D
<u>MEDIA:</u>	S4C / S4C Digidol (Digital)	E
	Other television channels	F
	Radio Cymru	G
	Other radio stations	H
	Internet	I
	At school / college / university	J
<u>NOWHERE:</u>	Through friends/family / Word of mouth	K
	Nowhere – no information available	L
	Nowhere – don't want information	M
	Other (PLEASE SPECIFY)	X
	Don't know	N

(94-97m)