

JOINT MARKETING STRAGTEGY

**Produced by a Working Group of
industry representatives and other
relevant partners. Coordinated by
the Welsh Books Council.**

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1. INTRODUCTION

Marketing has long been recognised as one of the weakest links in the publishing chain in Wales and this weakness can be attributed to a number of different reasons, mainly associated with insufficient resources and a system of public sector support which has concentrated to a large extent on production. Such a system has obvious limitations which are only now being recognised.

The report of the Task and Finish Group (2002) chaired by Delyth Evans in her role as Deputy Minister for Culture, recognised the need for additional resources for publishing in Wales and a start has been made by increasing the Publishing Grant (for Welsh-language publishing) to provide increased remuneration for authors and to provide funding for editorial appointments in the main publishing houses.

One of the main recommendations of the report, however, was the need for an industry-wide joint marketing strategy and this was seen to be equally relevant to publishing in English and Welsh. The Welsh Books Council was invited by the Welsh Assembly Government to coordinate efforts to produce such a strategy and the work was entrusted to a group comprising interested parties and including representatives of publishing in both English and Welsh, including trade members, libraries and authors' groups. In all cases where this was possible, members were chosen by their respective groups.

The strategy is an attempt to identify weaknesses and to address them in a coherent way, working to the strengths of each particular sector and adopting a partnership approach wherever possible. The aim was to produce a strategy which would be the voice of the industry as a whole, including relevant partners, and the use of the word 'we' throughout the document is a deliberate attempt to convey that all-important ownership.

A draft version was circulated widely as part of a consultation process and the final version of the strategy has been approved by the working group chaired by Richard Houdmont of the University of Wales Press in his role as Chair of the Welsh Books Council's Marketing Panel.

Following the recent transfer of responsibilities from the Arts Council of Wales to the Welsh Books Council, there is an opportunity for the first time to develop the industry in a structured and strategic way. Whilst recognising the need for a joint marketing strategy, there is also a real need to increase individual publishers' revenue and programme grants in order to redress the current imbalance between production and marketing and to enable publishers to promote individual titles effectively. We believe that this objective should be pursued in tandem with the development of a joint marketing strategy.

This strategy has funding implications and detailed costings will need to be made in the next stage of development. If the strategy is to be implemented, there is a need for a similar grouping to the current working group comprising representatives of all relevant sectors, whose task it would be to monitor progress. We believe that most of the joint initiatives listed in this strategy are suitable for outsourcing through project funding. This would enable the industry to benefit from a wider range of experiences and skills, from within and beyond the publishing sector.

2. METHODOLOGY

2.1 Background

The Welsh Books Council responded to the request to coordinate efforts to produce a Joint Marketing Strategy in the following manner.

The matter was first discussed at the Council's Marketing Panel (3 October 2002). At that meeting it was decided to entrust the task of preparing the strategy to a Working Group, under the chairmanship of Richard Houdmont, chair of the Marketing Panel, and it was agreed to invite groups which represented the relevant sectors to nominate members to serve on the Working Group. The groups invited were:

- One representative Literary Publishers (Wales) Ltd
- One representative Cwlwm Cyhoeddwr Cymru
- Two booksellers (Welsh-language bookshop / independent English-language bookshop)
- One representative Society of Chief Librarians
- One representative CILIP Wales (*Chartered Institute of Library and Information Professionals Wales*)
- Two representatives Welsh Books Council
- One representative Academi
- One representative Writers' Guild

It was accepted that there would be individuals whose views might not be represented by the groups that are currently in existence but it was felt that the consultation process would allow for all views to be taken into account.

A letter explaining the process was distributed widely to the trade on 17 October 2002.

2.2 Working Group Members

(See Appendix 2)

2.3 The process

The first meeting of the Working Group was held on Wednesday, 8 January and it was agreed that the two central issues which needed to be addressed were:

- i How to expand the market for books from Wales
- ii What are the problems facing the industry as it tries to expand the market

Members were asked to consider these questions from the point of view of their sectors and to consult within their sectors before submitting their responses.

A second meeting was held on 20 February to consider the comments received from the members. The evidence was collated in advance and presented in table form, under

relevant headings. Each theme was discussed in turn, before agreement was reached on the individual points.

Following the meeting, the Chair and officers proceeded to prepare a draft document incorporating the recommendations which were agreed by the Working Group. The draft was circulated to members and a meeting held on 25 June to examine each point in detail and agree the recommendations.

A draft version of the strategy was widely circulated as part of the consultation process. Responses were invited by 5 September. The Working Group met on 3 October to consider the responses and to prepare a final version of the strategy.

The strategy will be presented to the Minister for Culture, Welsh Language and Sport through the Welsh Books Council and will be available to the Culture, Welsh Language and Sport Committee during its policy review of English-medium writing in Wales.

3. WHAT IS MARKETING?

Insufficient or ineffective marketing is often quoted as a reason why a book has not sold well. Many confuse 'marketing' with 'promotion'. It is, therefore, worthwhile briefly reminding ourselves exactly what we mean by marketing.

There are numerous definitions of marketing, but here is the official definition from the Chartered Institute of Marketing:

Marketing is the management process responsible for identifying, anticipating and satisfying customer requirements profitably.

Evidently this process involves every member of staff, not just 'the marketing department' and is equally applicable to the head of the company and the receptionist. Marketing planning and control involves the following steps:

- 1 Mission
- 2 Audit
- 3 Objective
- 4 Strategy
- 5 Tactics
- 6 Control

3.1 Mission

A short broad-brush statement of the purpose of the business.

3.2 Audit

Before objectives can be set you need a thorough understanding (audit) of the position of the business in the marketplace. The audit is basically a SWOT analysis (strengths, weaknesses, opportunities and threats).

3.3 Objectives

Quantified and time-limited.

3.4 Strategy

How will you achieve the objectives? 'Strategy-making, unlike manufacturing, selling or product development, is the one part of your value chain that cannot be outsourced.'

Professor Malcolm McDonald

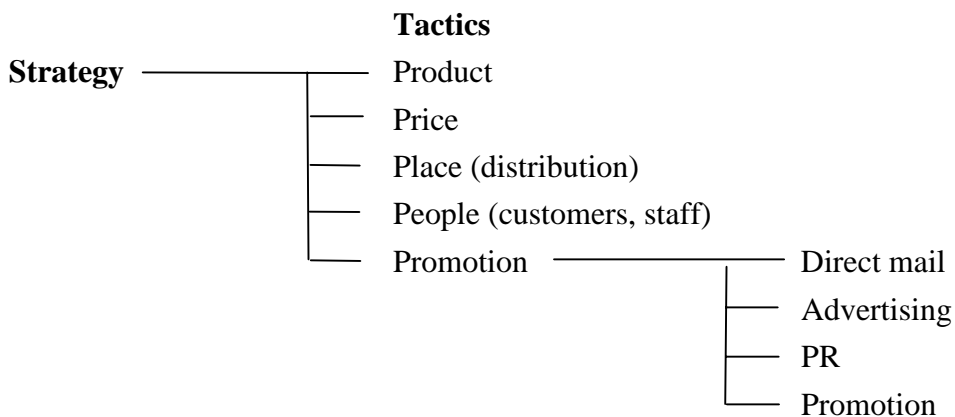
The matrix below can be summarised simply as: which customers do we go after and what do we offer them? The answers to those two questions are, essentially, the marketing strategy. As can be seen, the risk increases when new products are introduced into new markets, whereas the risk is less when 'old' or existing products are sold to 'old' or existing markets.

		Product		
		Old	New	
Market	Old			⇄ Risk ⇄
	New			
⇄ Risk ⇄				

Having set the objectives we then need to flesh out our strategy to achieve those objectives. Many books have been written on this subject, and authors differ in their approach. Below is a list of five **Tactics** upon which strategy is based.

3.5 Tactics

The Product is key to the success of the strategy, and steps should be taken to ensure that the books which are published are suitable for the markets which are being targeted. Other factors encompassed by the heading are Price, Place, People and Promotion.



3.6 Control

Monitoring sales results is an important feature of marketing. There has to be a feedback loop from the results which informs the objectives and strategy. Nevertheless over-dependence upon past performance can be dangerous. Marketing has been compared to driving down a motorway and deciding which way to turn the steering wheel by looking out of the back window. The past is not necessarily a good guide to the future. Occasionally we have to take risks but they must be quantified and controlled.

4. FINDINGS AND RECOMMENDATIONS

4.1 FINDING

Books from Wales receive comparatively little attention in the media in Wales compared to books published in the rest of the British Isles.

OBJECTIVE

The value of reading, literacy, and Welsh citizenship will be enhanced when books from Wales command greater attention and gain a higher status in the media of Wales. This will encourage bookshops to stock the books and improve sales.

TACTICS

Employ a publicist or agent (ideally one for each language) who will:

- 1 Operate as a lobbyist promoting new books to radio and TV producers, and the press, and identifying new media opportunities.
- 2 Provide a central point of contact for those in the media requiring an author.
- 3 Monitor the use of books from Wales in the media of Wales and provide feedback to publishers.
- 4 Assist publishers who wish to approach the media direct.
- 5 Create a 'knowledge warehouse' (see 4.3.6) available to all publishers of Wales via the Welsh Books Council (WBC) website (with password security) including downloadable contacts lists; best practice on how to prepare a press release; how to approach a radio/TV producer/journalist; how to adapt your selling points to meet the needs of the media; how to 'sell' authors; how authors can help sell themselves.
- 6 Provide training: the emphasis must be one of sustainability and empowering publishers to take on this work themselves or to so improve the visibility of their books in the media that they cannot afford *not* to fund the scheme after the trial period.
- 7 Raise the profile and status of books from Wales, and the publishing industry in Wales, by promoting a series of award ceremonies. We shall work with the Academi on the 'Oscar-ization' of the current Book of the Year Award. We wish the Welsh Books Council to consider funding a ceremony to recognise the achievements of the publishing industry where a wide variety of categories would be included such as 'bestsellers' (of various kinds), 'best cover', 'best editor' (nominated by authors), publisher of the year, independent bookshop of the year (nominated by customers). The new, prestigious Basic Skills Book Awards, organised jointly by the Basic Skills Agency and the Welsh Books

Council, will be an example of such an event. Ceremonies of this kind will also provide ‘copy’ for the magazine (see 4.2.1) that will support the publicists’ work. The ceremonies would ideally be broadcast on television. In order to provide useful feedback to publishers, the deliberations of the ‘best cover’ judges shall be made available to publishers.

- 8 Assist publishers with book launches which are a good source of material for the media and raise the profile of authors and books in general. A successful launch will draw in all sectors of the industry, from author to publisher to bookseller to customer (including libraries of course). A specific target will be set regarding the proportion of books to be launched each year.

4.2 FINDING

There is a need for more generic promotion and public relations activities.

OBJECTIVE

Increase awareness amongst the general public of Welsh authors and books published in Wales.

TACTICS

- 1 Publish a free book news magazine. In addition to the WBC’s co-operative advertising catalogues *Gwledd y Nadolig*, *Llyfrau’r Haf* and *Books from Wales*, which are well received, we shall promote books from Wales with an entertaining, informative, timely and colourful magazine designed with an easy-to-read format. Articles will be aimed at the general reader with an emphasis on popularising books and access to all. The distribution of the magazine will be the key to reaching *new* readers, i.e. those who have not previously considered buying or reading books from Wales. The aim shall be to make all sectors of the industry, including libraries, feel that they ‘own’ the magazine and help to distribute it even if their particular area of interest is not served by a particular issue.
- 2 The profile of books will be further raised by generic advertising on television, cinema, radio, posters i.e. intentionally using ‘broadcast’ methods rather than aiming at highly targeted niche markets. This promotion will necessarily entail careful measurement of improvements in ‘brand’ awareness (reading in general and in particular books from Wales) to prove its effectiveness and justify further investment.

‘Brands’ are normally associated with a single company. They enable a consumer to make a choice based on past performance of products bought or the reputation of the company. ‘A brand is a complex thing. Not only is it the actual product, but it is also the unique property of a specific owner and has been developed over time so as to embrace a set of values and attributes, both tangible and intangible, which meaningfully and appropriately differentiate products

which are otherwise very similar,' says John Murphy, founder of Interbrand¹. Can 'books from Wales' have a 'brand' over and above that of the individual publishers? Since many of the books are sold via the Welsh Books Council there may be a collective image of the 'values and attributes' of the titles in the booksellers' minds, and since many are displayed on the same shelf, regardless of subject, there may also be a collective image of 'local (sic) books' or 'books from Wales' in the mind of the consumer.

- 3 World Book Day has been an enormous success as a result of cooperation between sectors. Wales has benefited from British publicity for the Day. In addition to the current emphasis on reading and literacy, we recommend that a distinctive Welsh 'angle' of World Book Day should be created, based on the original Catalonian tradition, that the Day should be celebrated by the buying and giving of books.
- 4 'Brand' awareness will be further strengthened by creating 'point of sale' material. This image can be used beyond point of sale in corporate campaigns, be it in posters, or a free magazine. Small independent bookshops throughout Wales will be able to buy into this corporate image providing them with substantial savings.
- 5 Bookshops will be encouraged to create their own book fairs and attend events where there is an audience and an opportunity to sell. The current WBC Outreach Scheme, which has been a proven success (over £900,000 of sales at Outreach Scheme events since the scheme's inception) will be extended and innovative ideas from booksellers shall be particularly rewarded. The improved scheme will include bookseller training as a key part of its remit, and minimum standards shall be required when bookshops attend a sponsored event (signage, credit card facilities, bags, catalogues and so on). The scheme may also help by providing mobile display units.
- 6 The possibility of establishing a discount scheme to encourage bookshops to increase their stock holding will be explored.

4.3 FINDING

The lack of structured communication between the various elements of the publishing industry in Wales is surprising and inefficient. The industry in Wales is characterised by small, fiercely independent publishers and booksellers, and also British bookselling chains who consider books from Wales as marginal to their core business.

¹ Source: *New Business Magazine*

OBJECTIVE

By working with other companies, and (where appropriate) sharing knowledge, we will gain valuable strategic insights.

TACTICS

- 1 Industry groups work well in almost all industries, but there is little history of successful co-operation in Wales. Recent developments such as *Literary Publishers (Wales) Ltd* and *Cwlwm Cyhoeddwy'r Cymru* are welcome but are intentionally limited in scope and need support. Industry sector groupings need to be encouraged and financially supported (as they have recently been supported in England by the Arts Council of England). In recent years, Welsh booksellers have not seen the need to group together. Whilst the failure of previous attempts to form bookseller groups in Wales is discouraging, the benefits of such groups in other countries should be investigated, and the lessons applied to Wales. We propose that a limited research study be undertaken and that the results should be effectively disseminated to booksellers in Wales.
- 2 The practical importance of information flow to all elements of the supply chain from authors to booksellers will be emphasised, and 'best practice' in specific areas will be detailed in training units on the WBC's website. For example: the basic elements of rich bibliographic data; the basic information which should be supplied by authors to enable a publisher to effectively promote their book.
- 3 Publishers (initially through their sector groups *Cwlwm Cyhoeddwy'r Cymru* and *Literary Publishers (Wales) Ltd*) will agree minimum bibliographic (and sales) data to be supplied to the WBC within agreed time limits. It is recognised that timely, accurate, information is a key element in the successful marketing of a book. Therefore, the agreement shall include time limits within which WBC undertake to make the information available to booksellers and libraries in Wales, and to other bibliographic agencies beyond Wales. Training will be provided in order to ensure that booksellers make full use of the information supplied.
- 4 WBC will establish an e-mail *News Group* on the Web to allow the industry to exchange news and ideas in a cost-effective manner. The list owner and moderator shall be the WBC.
- 5 A 'knowledge warehouse' (see Appendix 1) on the WBC website will include free resources for all sectors of the industry. For example, downloadable names and addresses (including e-mail addresses) of publishers, schools, libraries, booksellers, and other ad-hoc lists which might become available to the WBC or others within the industry willing to share lists (within the restrictions of the Data Protection Act and 'anti-spamming' regulations). WBC shall be responsible for uploading this material on its site, maintaining its own lists and identifying the age of other lists provided for the site. The collation and maintenance of the lists could be outsourced.

- 6 WBC Distribution Centre will release as much sales information as possible to publishers. Because of the central importance of the WBC Distribution Centre to the well-being of the trade in Wales, this must be done without endangering its own commercial viability. WBC will seek to enter partnerships with publishers (the current LPW contract being one possible model) empowering publishers with sales data. Publishers will in turn use the information to assist their promotional and publicity efforts.
- 7 WBC will commission an independent review of its selling methods including the role and effectiveness of its system of representation. The recent Peter Kilborn report on the Distribution Centre recommended that ‘the area of sales representation should be kept under constant review’. As part of this review it will consider the likely benefit of extending its representatives’ territories into other countries of the British Isles.
- 8 Libraries are a key element in the industry but there is insufficient information flow between authors, publishers, booksellers and libraries (and vice versa). Libraries retain a wealth of market information based on issues statistics and they can help publishers promote books and provide venues for booksellers to sell and launch books, in addition to providing contacts with reading groups. An industry communication manager will be appointed who will: establish and nurture channels of communication; provide ongoing examples of best practice; and add to the web-based ‘information warehouse’ including up-to-date statistics, buying patterns, lists of contacts within libraries (such as *Estyn Allan* librarians, those responsible for purchase of stock, organisers of events etc), research and references to relevant reports, details of events and so on. It will be a key aim that information flow should be reciprocal.
- 9 Information flow within the industry will only be as good as its weakest link. The lack of use of new technology in small independent bookshops is therefore a matter of concern. We welcome the recently introduced technology grants for bookshops, and recommend that they be expanded.
- 10 We welcome the recent increase in market research, specifically focus groups. The recent transfer of responsibilities from the Arts Council to the Welsh Books Council will enable the Council to extend these focus groups to English-language publishing in Wales and to children’s publishing in Welsh and English, to make the results widely available and review at regular intervals the value of the data gained.

4.4 FINDING

The need for training has been identified by recent reports by Arts Training Wales and the Publishing NTO.

OBJECTIVE

Publishing depends upon the enthusiasm and creativity of its staff, and we call for carefully targeted training programmes aimed specifically at the industry's 'critical success factors'.

TACTICS

- 1 The existing grants to small independent bookshops should be extended to include training grants. We recognise that a major limitation on training for small independent bookshops is availability of relief staff to allow the owner to devote time to training. We note that training may not always be 'bought-in'. Courses and training grants should therefore recognise that the learning experience (continuing professional development) can take many forms.
- 2 The industry must aim for the highest standards, and we note the total lack of training and learning opportunities for authors/prospective authors and editors (commissioning and copy editors). We therefore intend establishing learning opportunities for authors/prospective authors and editors in co-operation with the WBC, Academi and continuing education departments in the higher education sector in Wales (see Appendix 1).
- 3 Training and assistance should be available, free of charge, to booksellers and should be mandatory for booksellers whose shops receive grants from the WBC, so that booksellers in Wales are fully aware of the market in Wales and the books already published to meet that demand.
- 4 Publishers should also be offered training and assistance (especially those in receipt of grants) to attend courses, particularly in the fields of commissioning, marketing and rights sales, including the legal and contractual issues.

4.5 FINDING

We do not know what is the size of the market for books from Wales. Intuitively and anecdotally we know that the full market potential is not being achieved.

OBJECTIVE

Establish SMART objectives for the industry, expanding the market. (SMART stands for Specific, Measurable, Achievable, Relevant and Time-based.)

TACTICS

- 1 We welcome the recent improvements to *www.gwales.com* and believe there is room for further development. Hand-in-hand with direct selling from *gwales* we welcome the WBC's plans to use their database to help booksellers to establish their own websites by providing the underlying data in an easily accessible

format (see 4.3.3). Training is also a key element. The proposed *News Group* would be an opportunity for publishers and booksellers to share experiences of e-commerce software.

- 2 We need to determine whether there are significant markets in other countries of the British Isles not currently reached by the individual efforts of publishers in Wales. We note the early success of the WBC's Overseas Marketing Officer and propose that similar work be undertaken to expand the market in the British Isles. The emphasis shall be upon empowering and supporting Welsh publishers; ensuring the accuracy and comprehensiveness of databases of the major English wholesalers; the inclusion of our titles on all the major e-bookshops; selective stocking of titles from Wales by the wholesalers; encouraging Welsh bookshops to export to the rest of the British Isles.
- 3 No matter how much effort is put into promotion, at the end of the day 'good books' sell. We note the early success of the scheme to commission Welsh-language authors. In order to raise the profile of English-language books from Wales we shall seek to attract major British authors or British-media-led titles, from outside Wales, to be published in Wales. We shall seek funding to establish a commissions fund for publishers (on the lines of the fund for Welsh-language authors) to attract saleable authors, willing and able to write significant good books, which will be published by publishers in Wales.
- 4 We recognise the efforts of the most progressive independent bookshops and their contribution to sales of Welsh-language and English-language books from Wales. The welfare of the independent bookshops is central to the welfare of the publishing industry as a whole and these bookshops should continue to play a central role in the efforts to increase the market for books from Wales.
- 5 The position of books from Wales in the major bookselling chains within Wales is dire. The chains will not stock books out of a sense of duty. They need to be persuaded that it is in their self-interest to stock the books – that they are currently losing sales. We would welcome an initiative to commission a study of readership levels of books from Wales and Welsh authors within the library system. This will demonstrate the popularity of the books to the bookselling chains. In addition we propose that a Welsh/Wales booksellers' conference be held in Aberystwyth that will consider and debate the results of such a library survey. In addition it will provide an education opportunity for booksellers' continuing professional development.
- 6 Following the early success of the initiative with Tesco stores (15 stores agreed to display books from Wales in a Spinner provided by the WBC), the market will be further expanded by increasing the range and depth of titles stocked in supermarkets within Wales. The supermarkets will be persuaded not only by sales, but also by the attitudes of their customers. Image is increasingly important to supermarkets to differentiate themselves from competitors in a homogenous market. We propose that a survey of supermarket customers' attitudes be undertaken, to include their attitude to seeing books from Wales on sale in supermarkets; how they are displayed by the supermarket; the frequency with which the customers use libraries and/or buy books from traditional or non-

traditional book outlets. Attention should also be paid to existing surveys, particularly in the library sector.

- 7 Customer surveys will be undertaken on an on-going basis to measure the success of efforts by publishers to expand awareness of their products within Wales and beyond.
- 8 An information database on authors and their work will be established, which can be used to promote the work of individual authors. The information, and addresses of author websites, will be included in the 'knowledge warehouse' and on *www.gwales.com* and the Academi's website.

APPENDIX 1**Examples of headings for content of a web-based 'knowledge warehouse'.**

- .1 What influences book buying.
- .2 Downloadable media contacts lists including lists of reviewers; best practice on how to prepare a press release; how to approach a radio/TV producer/journalist; how to adapt your selling points to meet the needs of the media; how to 'sell' authors; how authors can help sell themselves.
- .3 Best practice on how to arrange a book launch in cooperation with bookshop, library etc.
- .4 Examples of best practice in libraries, including up-to-date statistics, buying patterns, lists of contacts within libraries, bibliographic officers, research, events etc.
- .5 Training Units, e.g. provision of bibliographical information, sales of rights etc.
- .6 Directory of Industry e-mail addresses.
- .7 Results of Market Research, Focus Groups etc.
- .8 Overseas Market Information Reports.
- .9 Advice on appointing an overseas distributor.
- .10 Guidelines for authors/prospective authors, e.g. guidelines on typesetting and presentation of text.

APPENDIX 2**Working Group Members**

Welsh Books Council	Richard Houdmont Deputy Director, University of Wales Press, 10 Columbus Walk, Brigantine Place, Cardiff CF10 4UP Chair WBC Marketing Panel R.Houdmont@press.wales.ac.uk
	Gareth William Jones Trinity College, Carmarthen, Carmarthenshire SA31 3AP Chair WBC Children's Books Panel g.w.jones@trinity-cm.ac.uk
Literary Publishers (Wales) Ltd	Mick Felton Managing Director, Seren, 1 st and 2 nd Floor, 38-40 Nolton St, Bridgend CF31 3BN mickfelton@seren-books.com
Cwlwm Cyhoeddwr Cymru	Alwyn Elis Gwasg Gwynedd, Cibyn Industrial Estate, Caernarfon, Gwynedd LL55 2BD Alwyn@gwasggwynedd.fsnet.co.uk
Booksellers (Independent English-language)	Ann-Marie Hinde Ystwyth Books, 7 Princess St, Aberystwyth, Ceredigion SY23 1DX halcyon.ystwyth@ukonline.co.uk
Booksellers (Welsh-language)	Selwyn Evans Siop y Siswrn 6-8 Stryd Newydd, Mold, Flintshire CH7 1NZ info@siopysiswrn.com
CILIP (Wales)	Huw Llywelyn Evans Executive Officer CILIP Wales Llanbadarn Fawr, Aberystwyth SY23 3AS hle@aber.ac.uk
Society of Chief Librarians	Rhian Williams Principal Librarian Conwy County Borough Council, Bodlondeb, Conwy LL32 3DU rhian.williams@conwy.gov.uk

Academi

Peter Finch
Chief Executive, The Welsh Academi,
Mount Stuart House, Mount Stuart Square,
Cardiff CF10 5FQ
post@academi.org

Writers' Guild

Bethan Gwanas
Ffrwd y Gwyllt, Rhydymain
Dolgellau, Gwynedd LL40 2AH
beth@bethan-gwanas.demon.co.uk

Staff

Phil Davies
Head of Marketing
phil.davies@cllc.org.uk

Gwerfyl Pierce Jones
Director
castellbrychan@cllc.org.uk

APPENDIX 3

Responses to the consultation process

Rona Aldrich
County Librarian and Archivist, Conwy County Borough Council

Robat Arwyn
Chief Librarian, Denbighshire County Council, Rhuthin

Huw Llywelyn Evans
CILIP Wales

Ann Ffrancon
Head of Access and Marketing, National Library of Wales, Aberystwyth

Garmon Gruffudd
Director, Y Lolfa, Tal-y-bont

Hywel James
Chief Librarian, Gwynedd Council, Caernarfon

Mairwen Prys Jones
Director, Gomer Press

Norma Jones
Library Service, Rhondda Cynon Taff

Lawrence Rawsthorne
Head of Libraries, Culture and Heritage, Flintshire County Council, Mold

Alyson Tyler
Honno (Welsh Women's Press), Aberystwyth

Luned Whelan
Secretary, Cwlwm Cyhoeddwyr Cymru