



Wales Audiences Summary

From the COVID-19 Cultural Participation Monitor

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This report summarises results for Wales from the first wave of The Audience Agency's COVID-19 Monitor, a nationally-representative online survey of the UK population and their experiences and responses to COVID, particularly in relation to cultural engagement. The wave 1 sample of 6,055 responses was carried out between Oct and Nov 2020. **The Wales sample was of 571 respondents, with a MOE of 4%.**

This report draws out some headline figures and key differences for Wales, compared to the UK overall, or other nations and regions. More details are available from The Audience Agency on request.

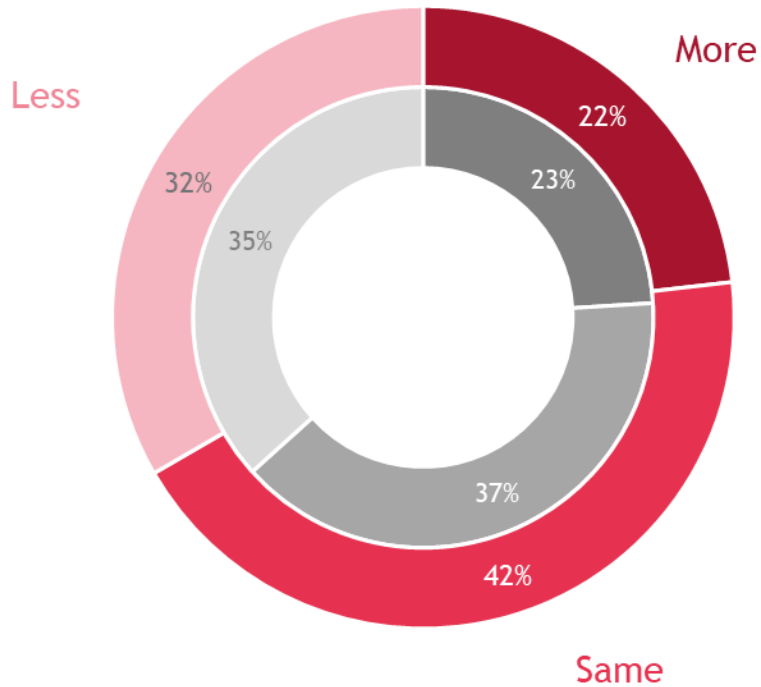
Summary of Findings

- Wales had levels of arts and cultural engagement before COVID that were in line with the UK average, but **levels dropped further** in Wales since March 2020 than overall (esp. for heritage), although creative activities dropped less (and reading for pleasure rose slightly more).
- As of the beginning of November, COVID appears to have had **a similar impact in Wales in terms of time and money** available to people. A lot more people faced local lockdowns, but similar proportions were shielding.
- Fewer Welsh are ready to start attending in person than the UK average.

Experiences During COVID-19

Impact of COVID on Time and Money

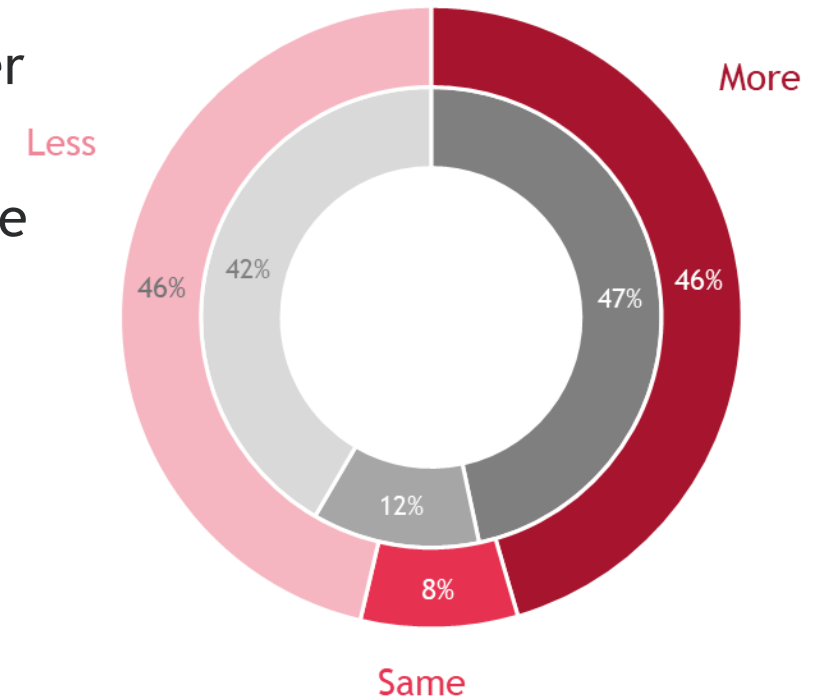
Change in Money **Wales** vs Overall



Slightly fewer Welsh saw financial drops than across the UK as a whole: there was a slightly higher proportion who had 'about the same' amount of money as before COVID.

Similar proportions of Welsh had more time.

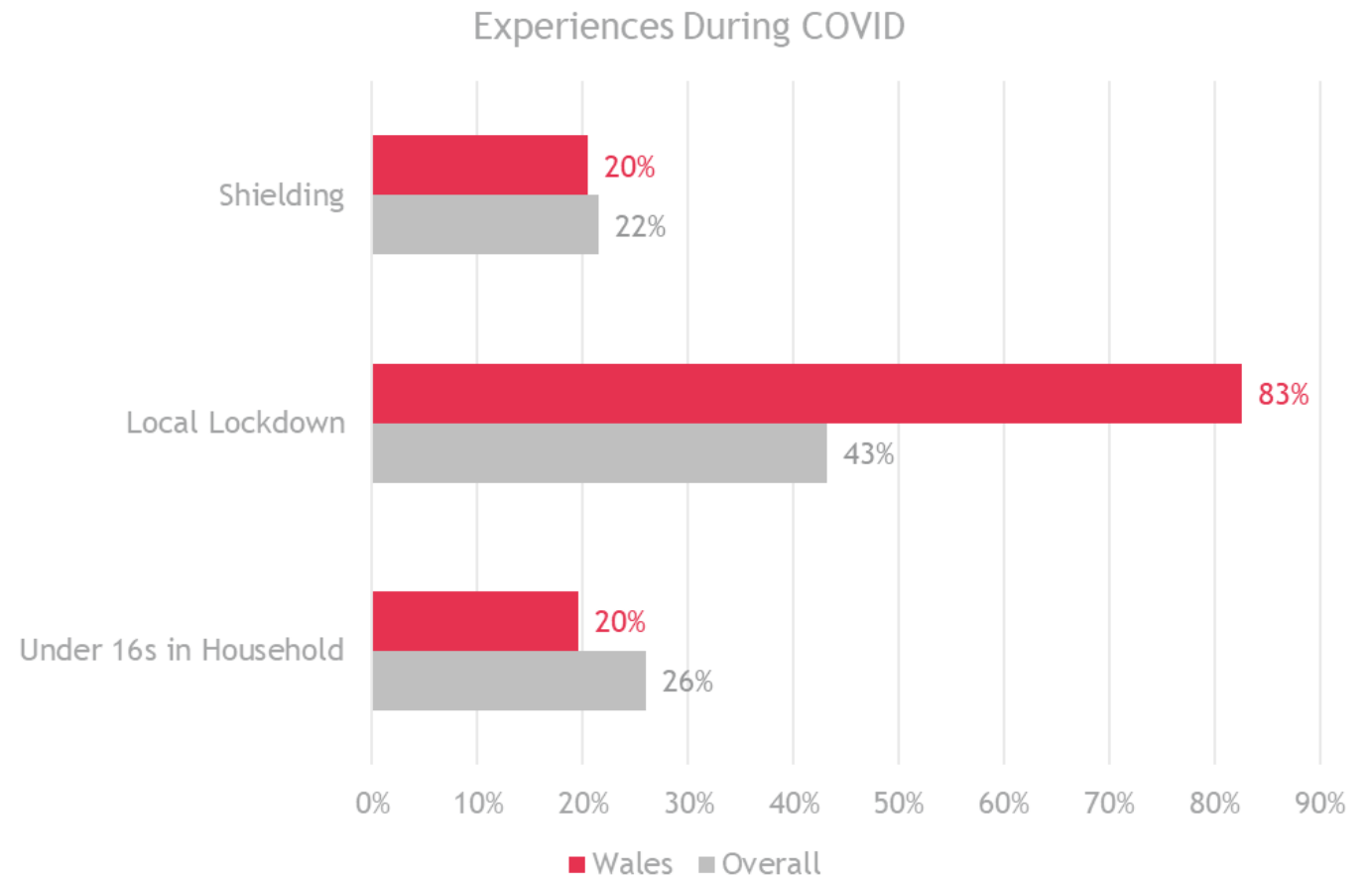
Change in Time **Wales** vs Overall



Other Impacts of COVID

Welsh were a lot more likely to have faced a local lockdown, but with a similar proportion shielding.

A lower percentage lived in households with children.



In Person Engagement

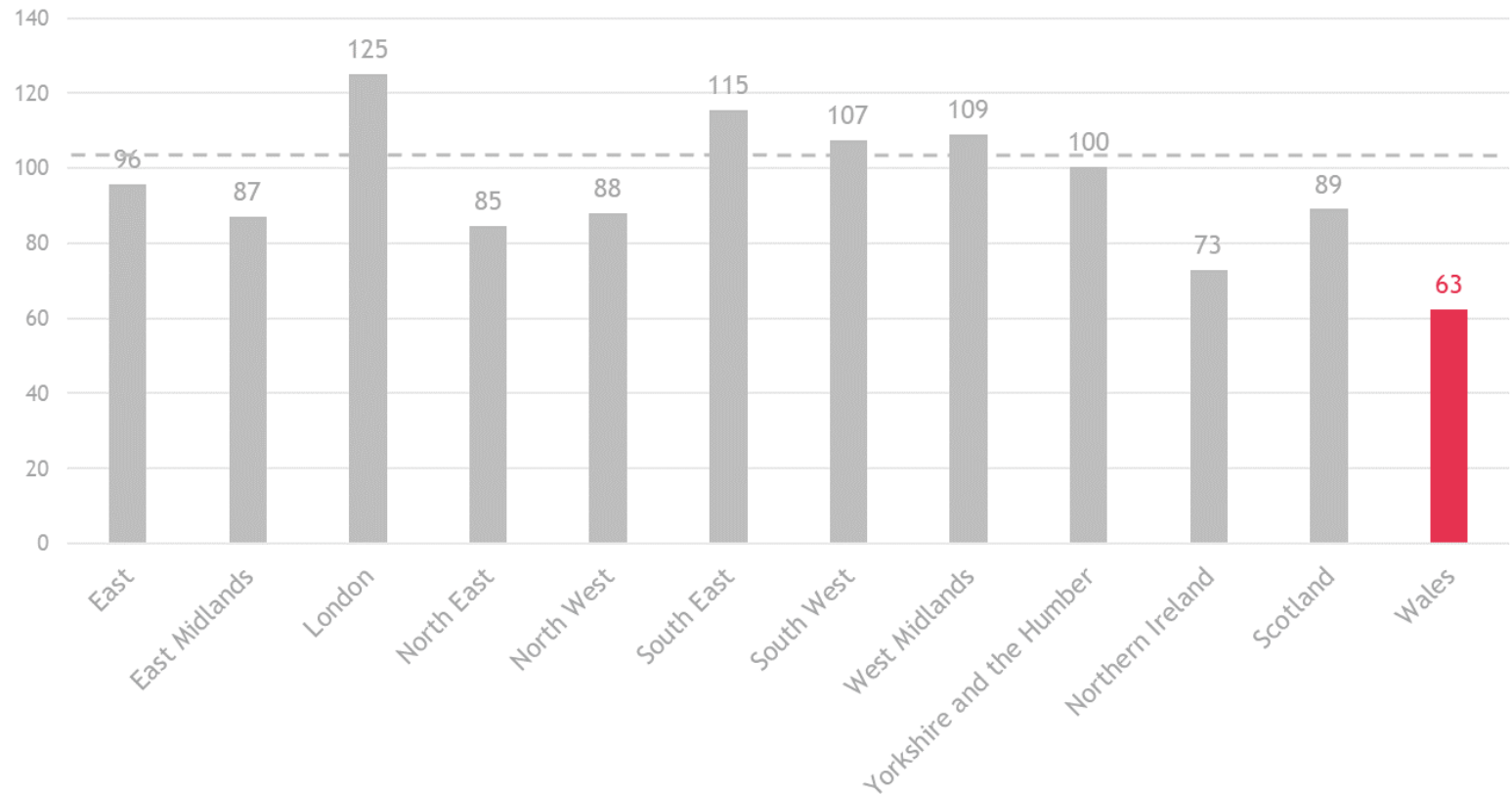
Attended Since March 2020

21% of Welsh had attended any arts/heritage since Mar 2020, below the overall UK average of 34%: **63** cf. to an index of 100.

It was notably lower than Northern Ireland and Scotland, (indices of 89% and 73%).

In the 12 months before, it was 84%, in line with the UK average.

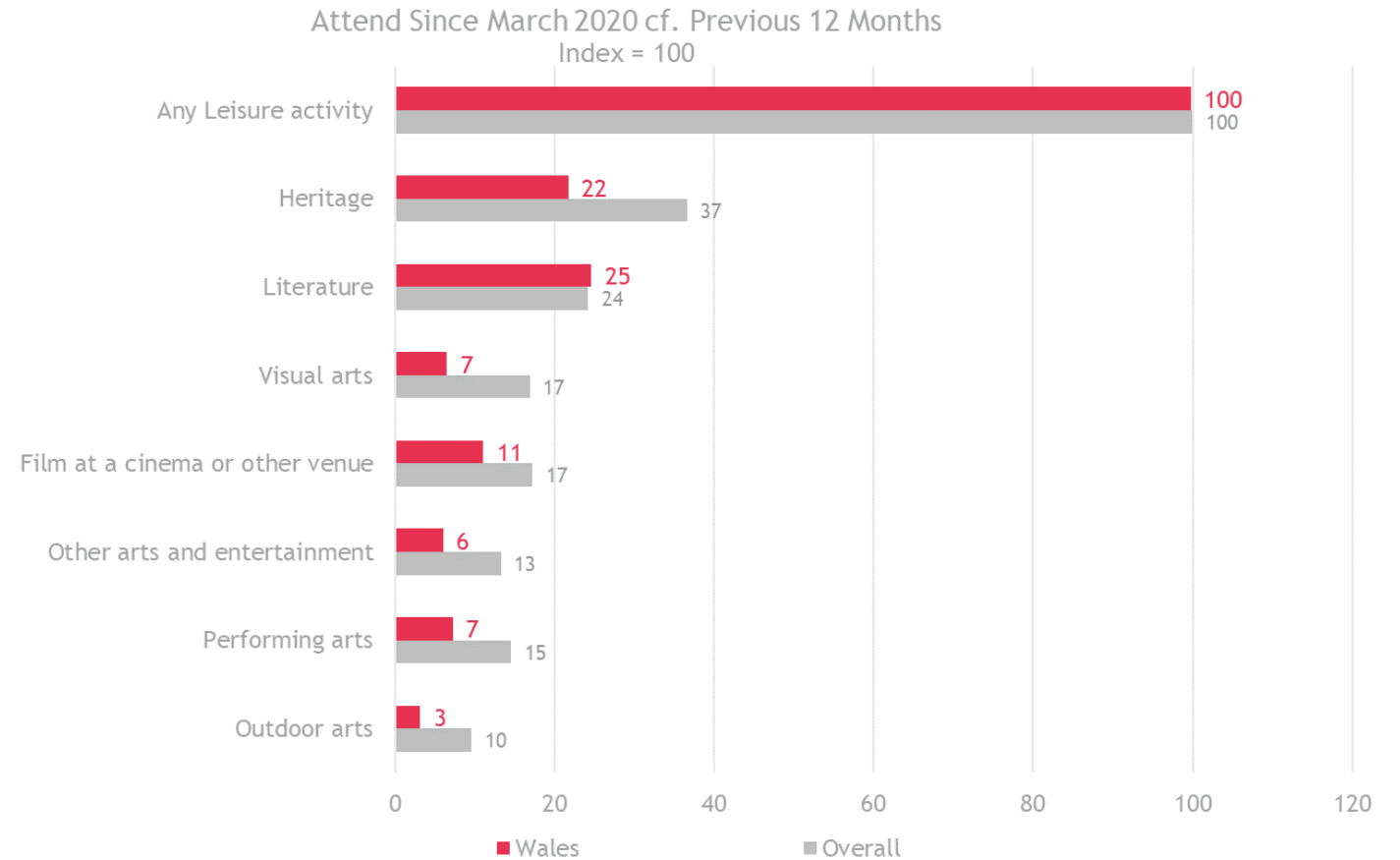
Any Arts/Heritage Since March 2020 Index cf. Overall



Attended Since March 2020

Attendance by Welsh dropped further than overall, compared to pre-March 2020 level, especially for heritage.

(NB: this is comparing 9 and 12 month periods)

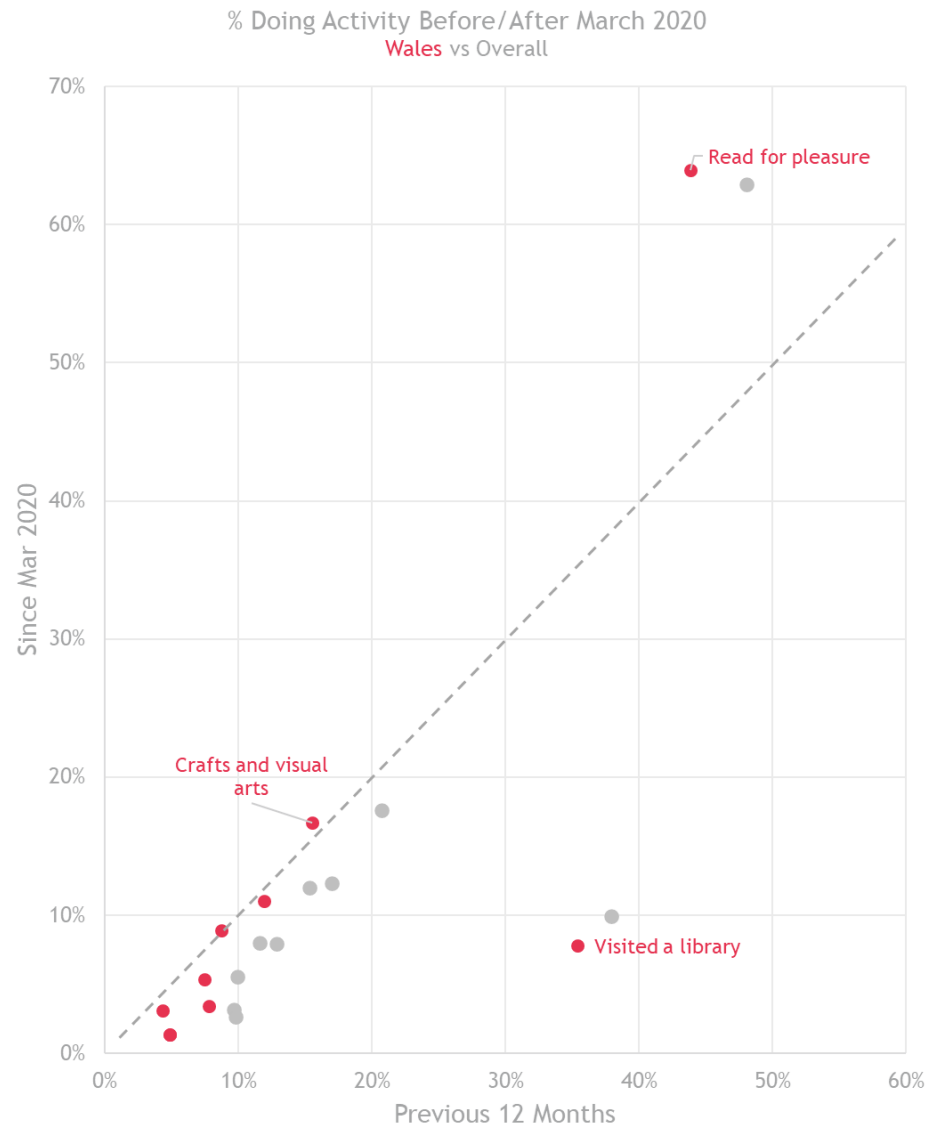


Creative Activities

Comparing creative activities before and after March 2020, four things stand out:

- Almost all activities were done by fewer people*
- Welsh read for pleasure at just under average levels before, but increased over average after March
- More Welsh visited libraries before March, but that proportion decreased more than elsewhere after March
- Overall, the activity levels of Welsh have reduced less than those for the UK overall.

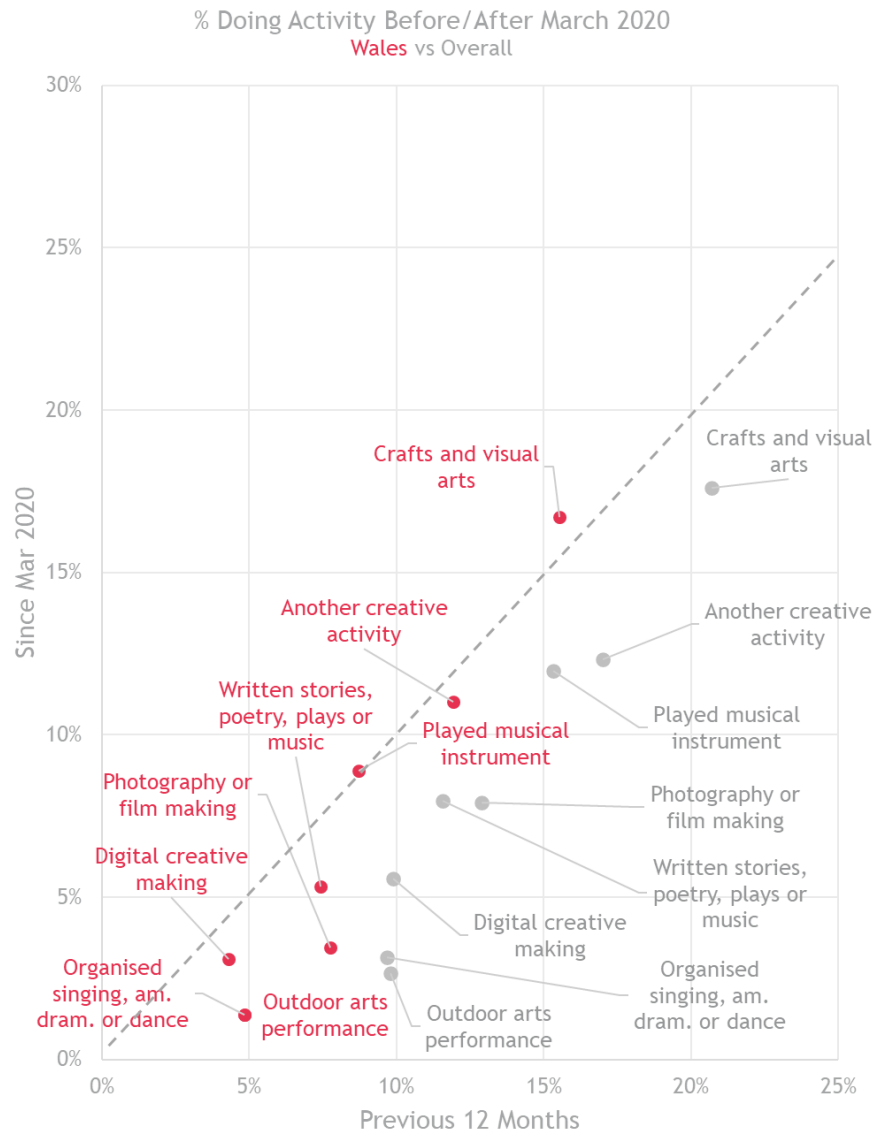
* So were below the dotted line (where levels would be the same)



Creative Activities

For other activities:

- Most were done (slightly) less in Wales before March 2020
- But most had fallen less in Wales than elsewhere since March 2020
- The overall ranking of activities is very similar between Wales the whole of the UK (although more elsewhere do ‘played a musical instrument’)



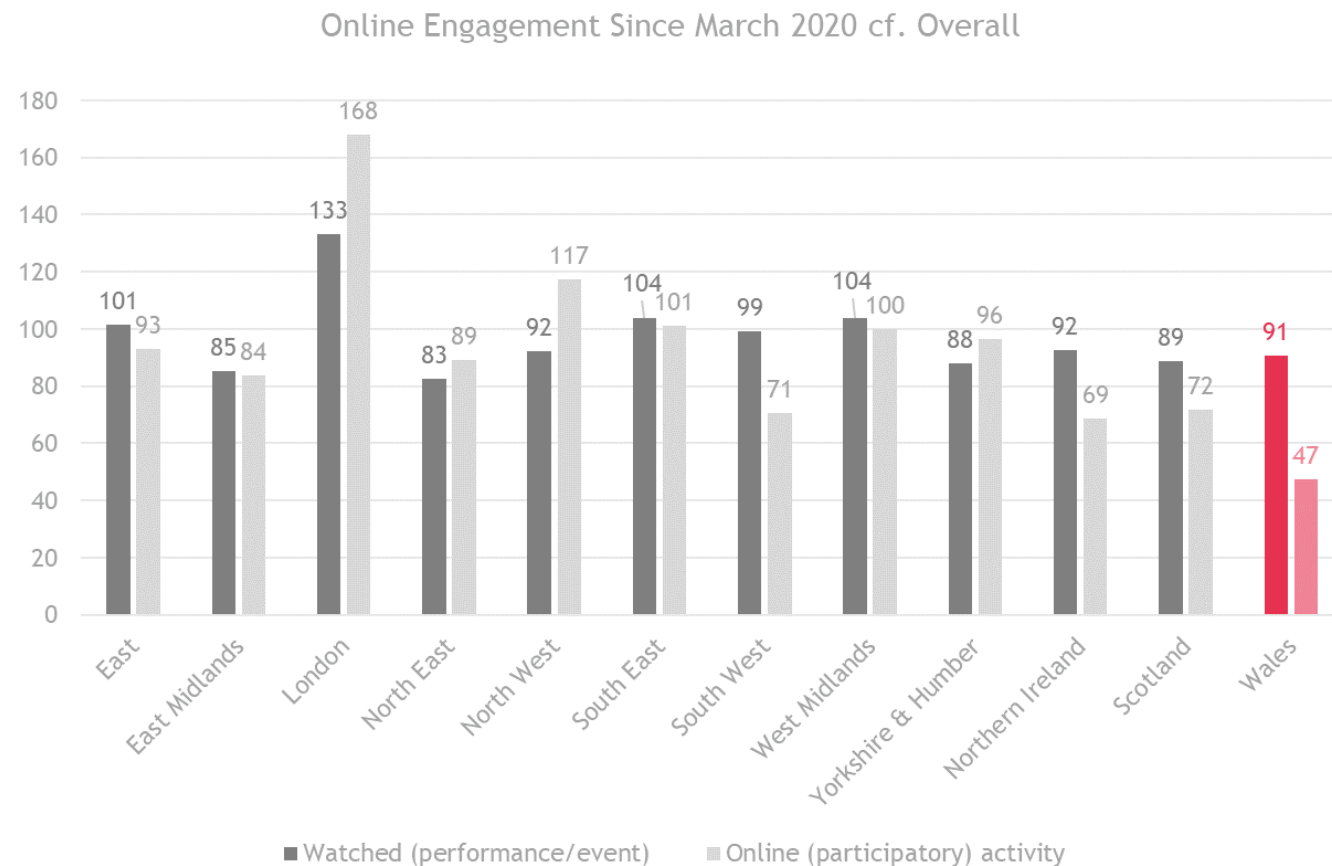
Online Engagement

Online Engagement Since March 2020

30% of Welsh watched a performance/ event online since March 2020; 4% had taken part in an online activity.

These were below the overall UK averages of 33% and 9%: **91** and **47** cf. an index of 100.

In the previous 12 months 44% (cf. 45% for the UK overall) had watched anything (an index of 97), so most of the lockdown difference is specific to this period, not existing levels.



Payment for Online Content

The proportion of Welsh who had paid for digital content by the following means were:

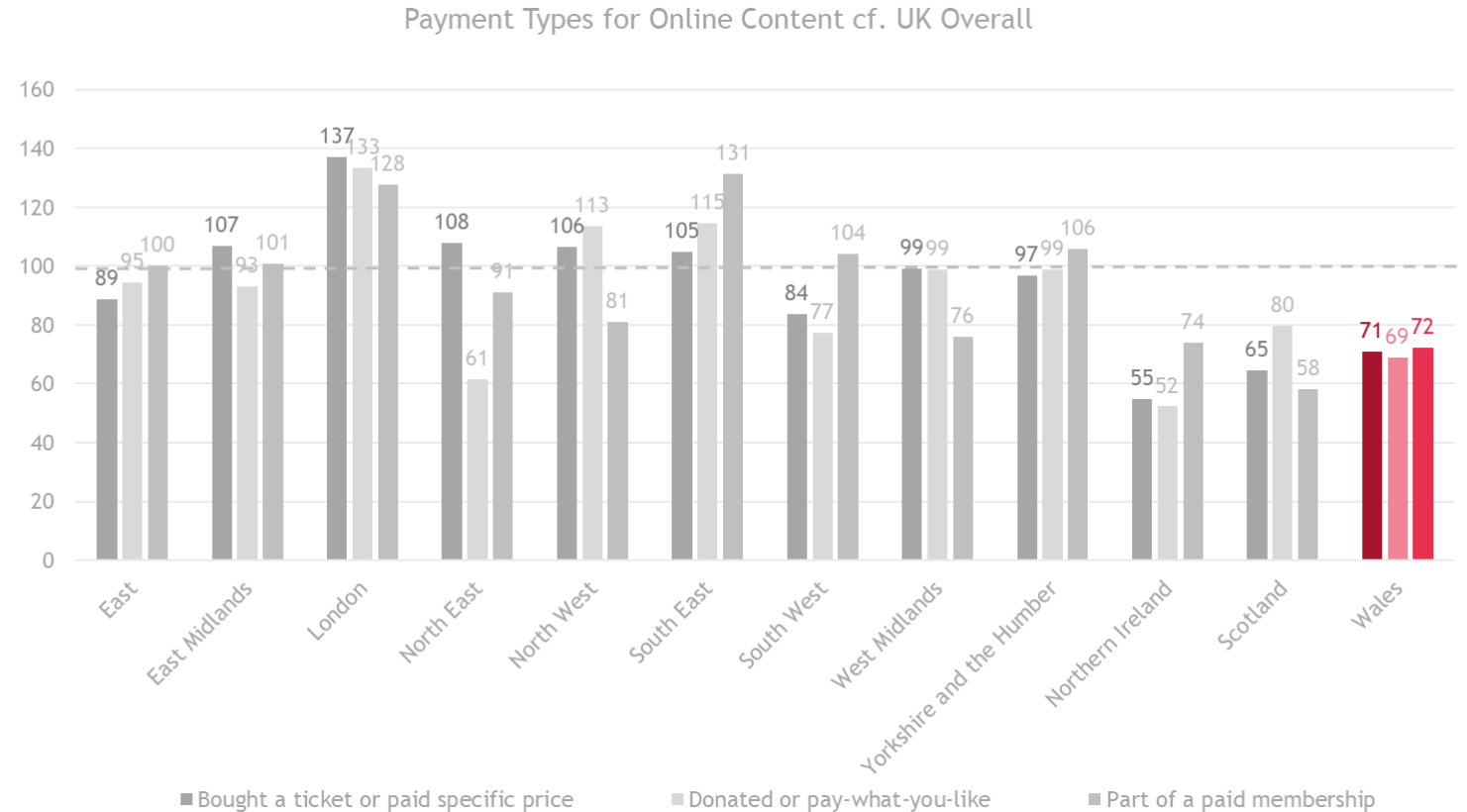
12% – Bought a ticket/fixed price

13% – Donated/ pay what you like

8% – Part of paid membership

These were below the overall UK averages of 17%, 19%, 11%:

71, 69 and 72 cf. to an index of 100.



Future Engagement

Booked or Interested Overall

The % who are currently 'in play' (i.e. who have booked, or are interested in booking) for ANY art and heritage activity of those listed (see next page) is c. 9% lower in Wales than the overall average.

Booked/interested for ANY art / heritage activity:

54%

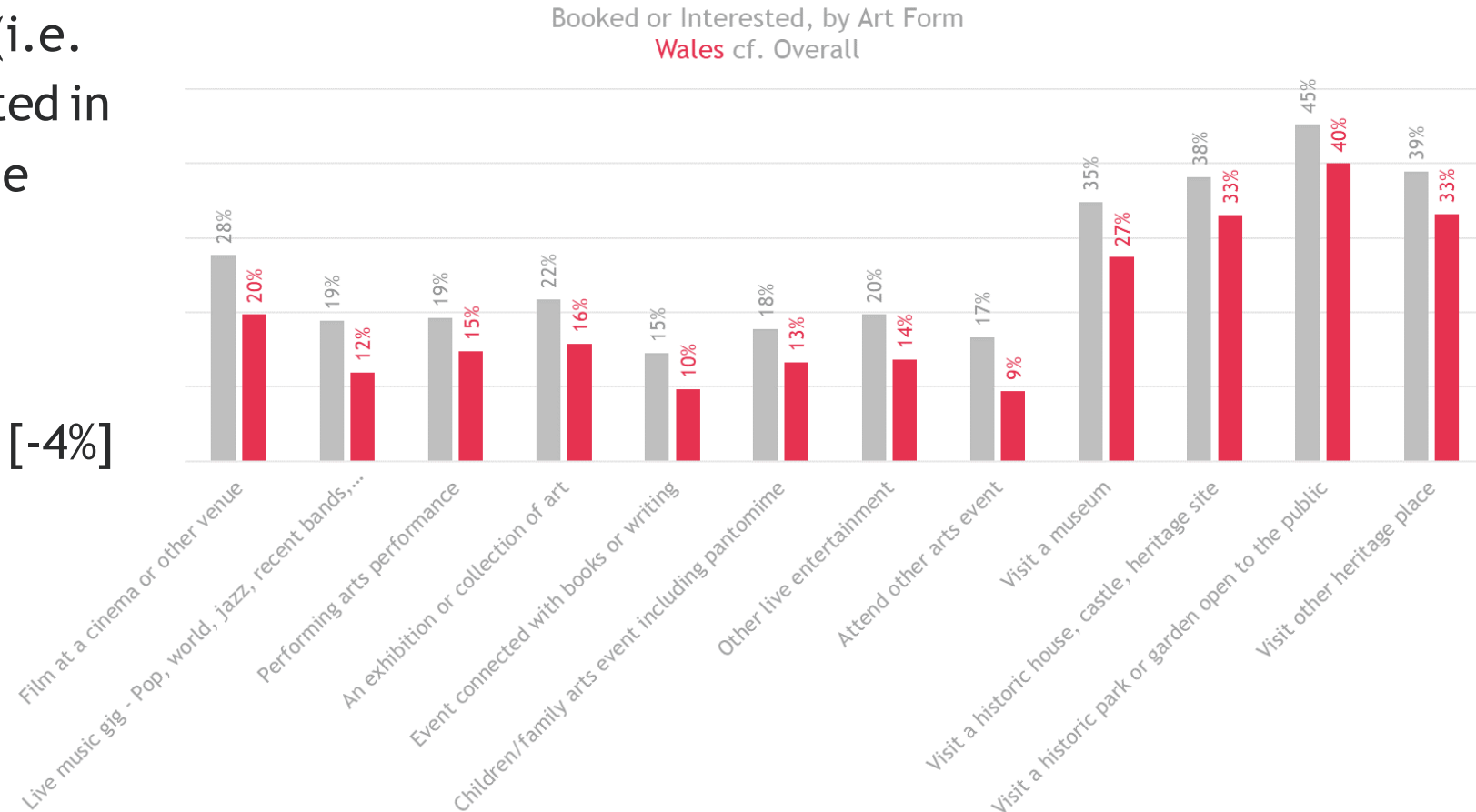
Cf. 63% for UK Overall

Booked or Interested by Art Form

The % 'in play' for each artform (i.e. who have booked, or are interested in booking) is also c. 5- 7% below the overall average.

Exceptions are:

- Performing arts performance [-4%]
- Children/family arts event including pantomime [-4%]
- Film at a cinema or other venue [-8%]



For more information...

Please get in touch: theaudienceagency.org
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For background and methodology, please see the
COVID-19 Monitor Summary Report and/or visit
theaudienceagency.org/bouncing-forwards-insights-hub/covid-19-cultural-participation-monitor

