



March 2026

Audiences in Wales

An Audience Insight Wales report using evidence from Audience Answers



the audience agency



Cyngor Celfyddydau Cymru
Arts Council of Wales

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Introduction

Last year an estimated 69% of the Welsh population attended an arts event.¹ Who were they? What did they do? How have their attendance behaviours changed in recent years? And maybe more importantly, who wasn't in this number and why do we think that is?

This report explores The Audience Agency's national audience datasets to try to answer some of these questions. Together, our aim is to give Welsh arts, culture and heritage organisations an evidence-base for what the bigger picture looks like for audiences in Wales, and where we see current trends leading.

1. [National Survey for Wales: results viewer dashboard | GOV.WALES](#)

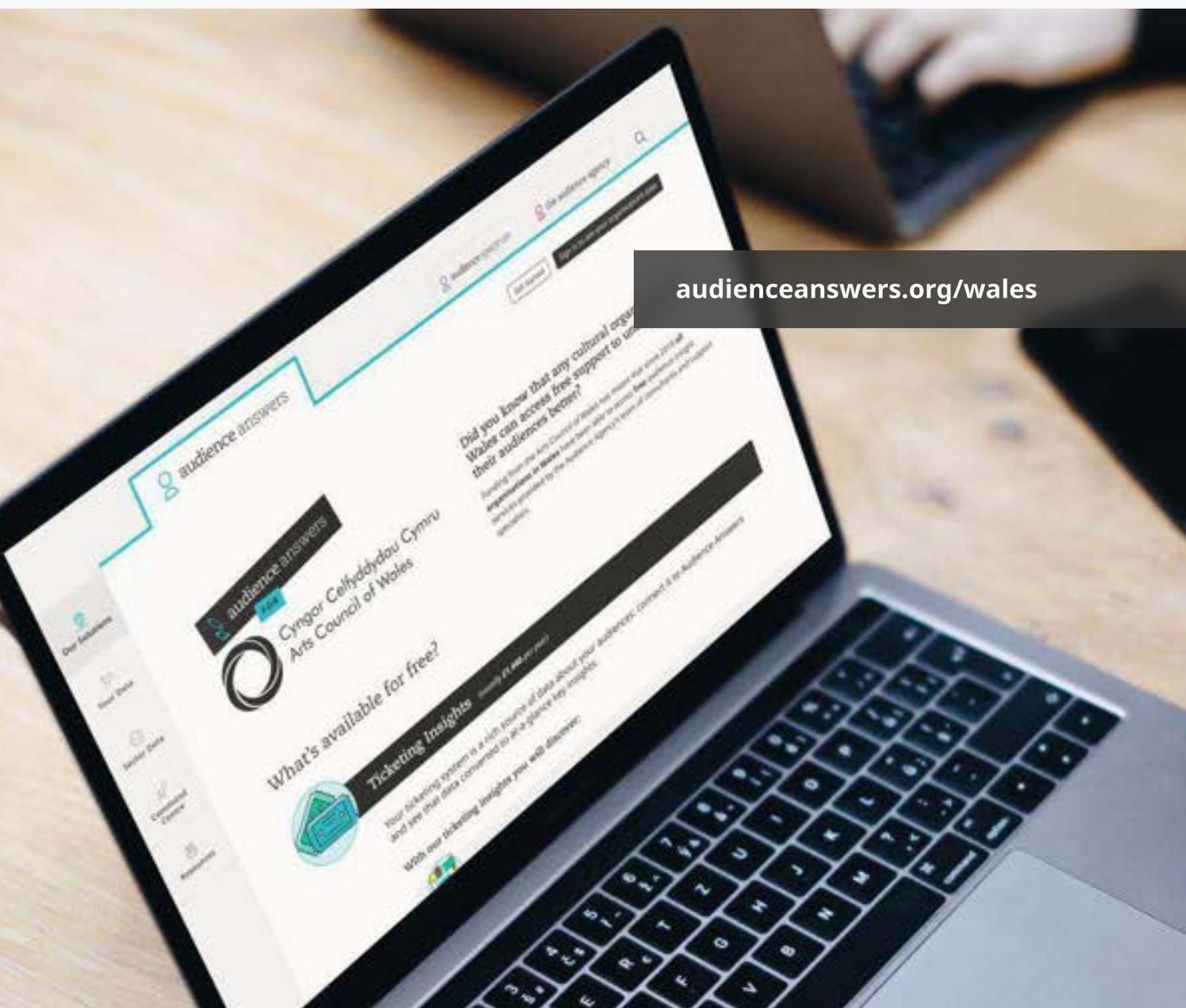
About Audience Insight Wales

This report has been made available as part of Audience Insight Wales. Funded by the Arts Council of Wales and delivered by The Audience Agency, Audience Insight Wales is our nation's cultural insights programme. Via the **Audience Answers** insights platform, the programme provides free audience insight tools and resources via to all arts and cultural organisations in Wales (not just the funded ones).

To find out more about how to access our wider tools and services, get in touch.

support@theaudienceagency.org

audienceanswers.org/wales





About Audience Spectrum

Throughout this report, we characterise different audience types using the Audience Spectrum segmentation model.

Audience Spectrum is a geo-demographic profiling tool, segmenting the UK population by their attitudes towards culture, and by what they like to see and do.



It's the most accurate segmentation tool the cultural sector has ever had; based on real data like the Census, and our own research about what people actually see and do.



It provides detailed guidance around what motivates people in each segment, what the barriers to engagement might be, and the tactics you could use to reach them.



It's a common language for talking about audiences across your organisation, and with other organisations.



It's relevant and accessible to all cultural organisations; no matter your size, type, or budget.



Metroculturals

Prosperous, liberal urbanites, interested in a very wide cultural spectrum.



Commuterland Culturebuffs

Affluent, professional and suburbanite keen consumers of traditional culture.



Experience Seekers

Highly active, diverse, social and ambitious regular and eclectic arts engagers.



Dormitory Dependables

Suburbanites and small towners interested in heritage activities and mainstream arts.



Trips & Treats

Mainstream arts and popular culture fans influenced by children, family and friends.



Home & Heritage

Rural and small town pensioners attracted to daytime activities and historical content.



Up Our Street

Sociable retirees looking for inexpensive, mainstream, local leisure opportunities



Frontline Families

Frugal, semi-urban renting families, light on arts and culture but heavy on community.



Kaleidoscope Creativity

Mixed age urban low engagers preferring free, local, culturally specific arts and festivals.



Supported Communities

Culturally low engaged, health poor, craft circle and church group seniors and youths.



To read the full pen-portrait and download motivation guides for each segment, visit audiencespectrum.org.



The Big Picture

What are the key takeaways about audiences in Wales?

Welsh venues are outpacing the UK-wide, 5 year trend, with a strong increase in ticket sales despite a relatively small rise in programming.

Wales' larger venues are engaging older audiences with high-medium cultural engagement, mid-scale venues are drawing more families, and smaller venues are the ones connecting with younger, highly engaged cultural segments.

Fewer events in Wales now fit neatly into traditional genres or artforms. Among those that do, programming for dance and music is increasing, while compared to 5 years ago, there are less family events and musicals being programmed.

Engagement from **Home & Heritage** audiences have seen a sharply downward trend UK-wide, however, this group **continue to make up an important, regularly attending part of the Welsh audience base** – particularly for mid-scale venues in semi-rural areas.



Artform Snapshots



Plays & Drama

This artform attracts a broad range of audiences, reflecting the variety of offer across Welsh theatres. Like Dance, nearly one in five book on the day, more than for other performing arts.

Action this evidence: Ask **Audience Spectrum Genie** for evidence-based tips to encourage advance booking across a range of different audience types.

Market share:



11%
of overall
tickets



13%
of overall
bookers



10%
of overall
income

Who?

Most bookers are:

Dormitory Dependables

Commuterland Culturebuffs

Trips & Treats

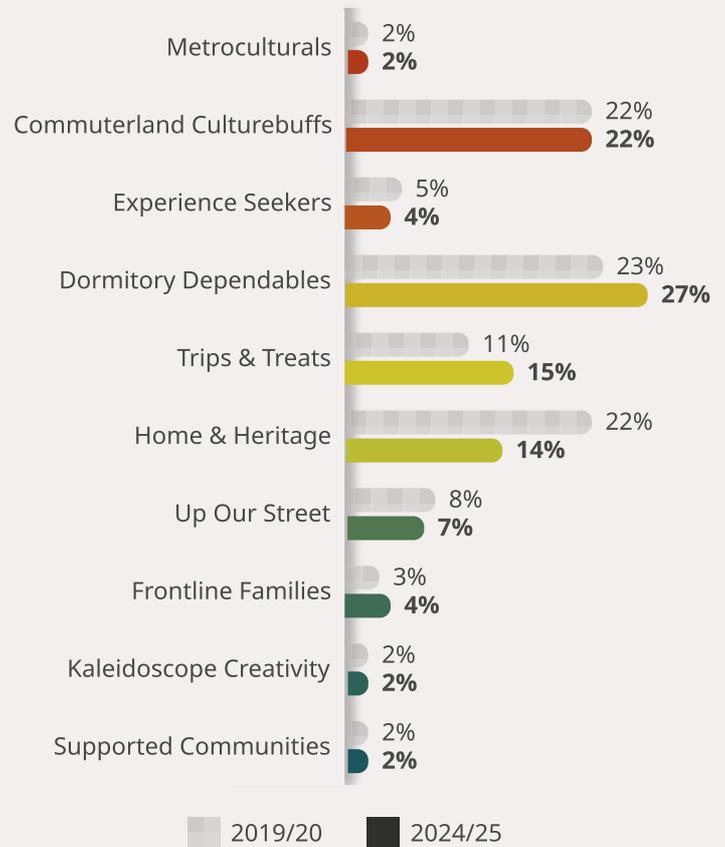
More likely than other artforms to attract:

Metroculturals

Commuterland Culturebuffs

Experience Seekers **Home & Heritage**

Change in tickets from 2019/20:



Booking behaviours:

Artform frequency



Advance booking



Why?

Top motivations:

To be entertained

To spend time with friends and family

To enjoy the atmosphere

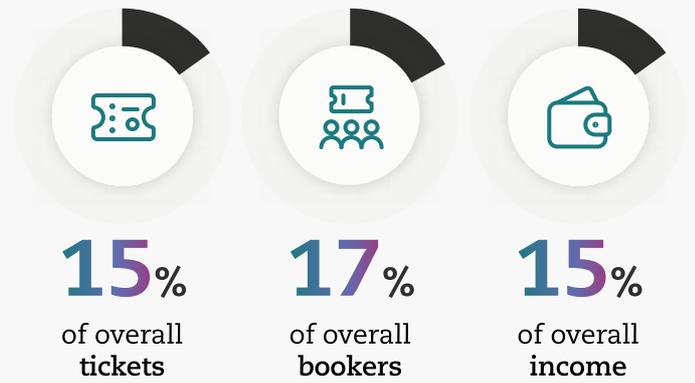


Music

Audiences of different genres vary, but overall, the artform is more likely to appeal to more lower-culturally engaged audience types than any other.

Action this evidence: Use the event groups feature in **Audience Answers** to see how your audience profiles for different music genres differ.

Market share:



Who?

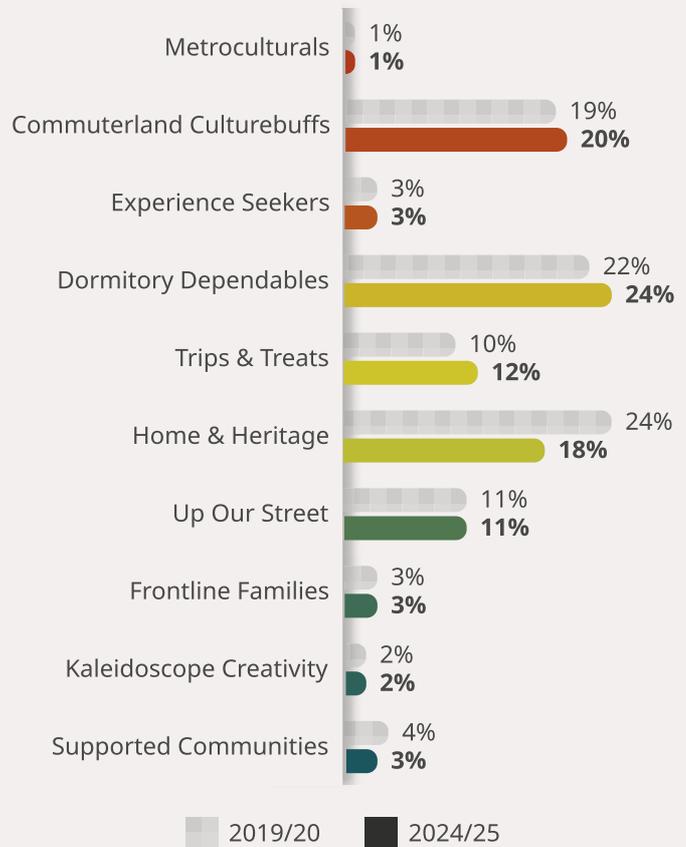
Most bookers are:

- Dormitory Dependables
- Commuterland Culturebuffs
- Home & Heritage

More likely than other artforms to attract:

- Home & Heritage
- Up Our Street
- Kaleidoscope Creativity
- Supported Communities

Change in tickets from 2019/20:

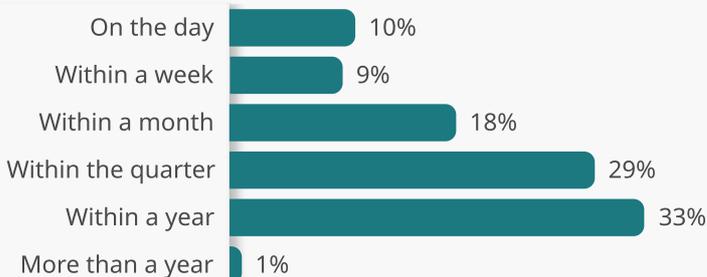


Booking behaviours:

Artform frequency



Advance booking



Why?

Top motivations:

To be entertained

To enjoy the atmosphere

To spend time with friends and family

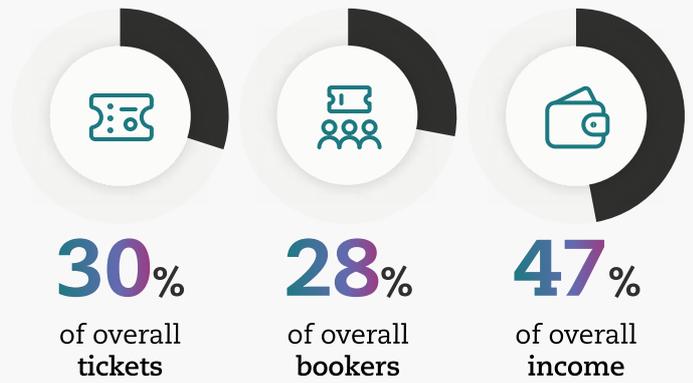


Musical Theatre

Musical theatre has the highest income generation and longest booking lead times of any artform, with broad appeal across families, young people, and adults.

Action this evidence: Read these [online guides](#) to design long-lead campaigns and experiences that speak to different audience types.

Market share:



Who?

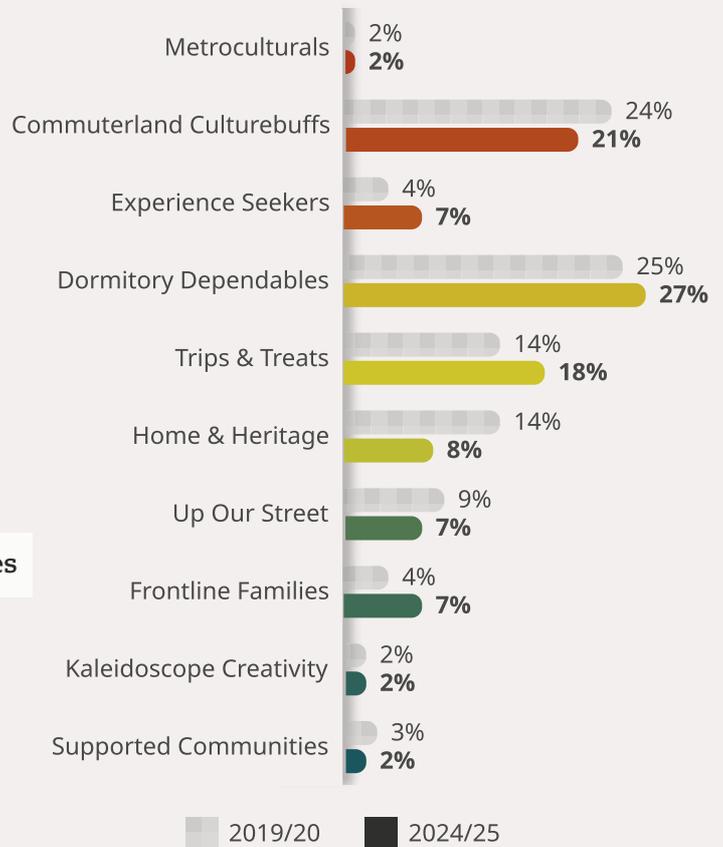
Most bookers are:

- Dormitory Dependables
- Commuterland Culturebuffs
- Trips & Treats

More likely than other artforms to attract:

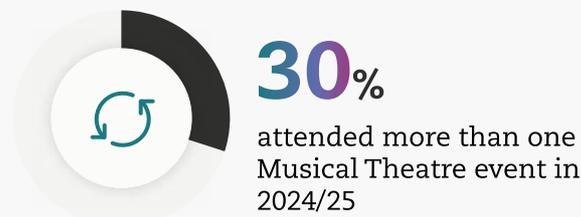
- Commuterland Culturebuffs
- Dormitory Dependables
- Trips & Treats
- Kaleidoscope Creativity
- Frontline Families

Change in tickets from 2019/20:

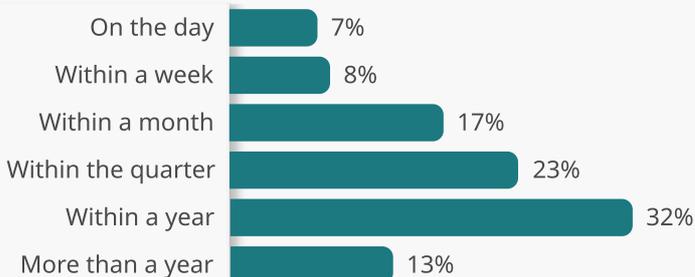


Booking behaviours:

Artform frequency



Advance booking



Why?

Top motivations:

To be entertained

To spend time with friends and family

To enjoy the atmosphere

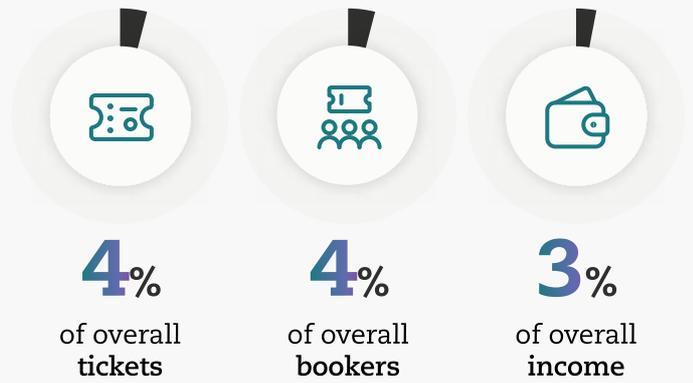


Dance

Dance audiences are similar in profile and behaviour to audiences for Plays & Drama, but like Film audiences, are more likely to be motivated by intellectual stimulation.

Action this evidence: Order a free **Touring Report** to see a profile of who's attending your dance productions across your tour venues.

Market share:



Who?

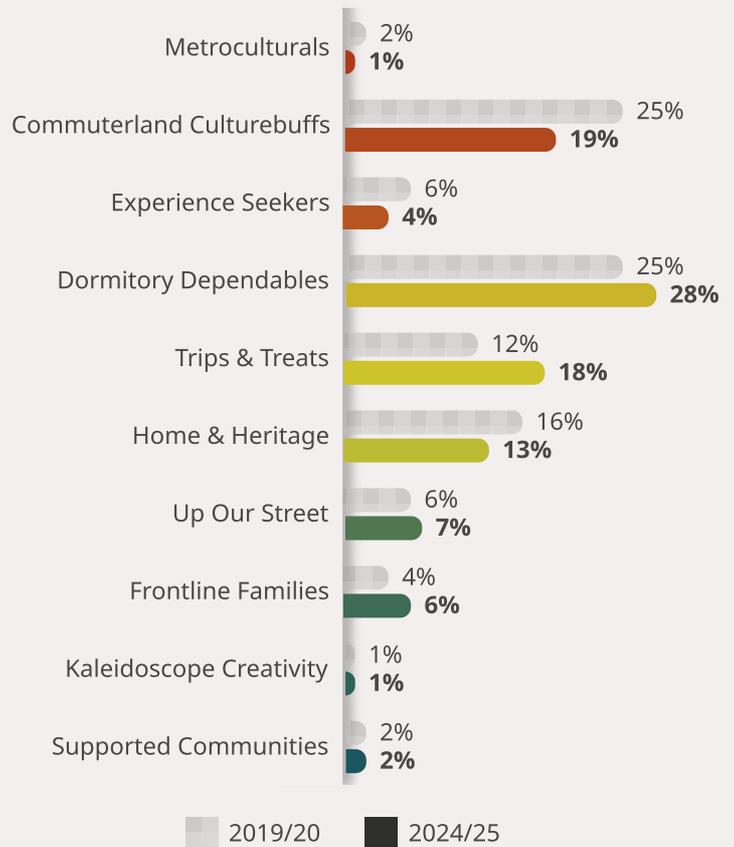
Most bookers are:

- Dormitory Dependables**
- Commuterland Culturebuffs**
- Trips & Treats**

More likely than other artforms to attract:

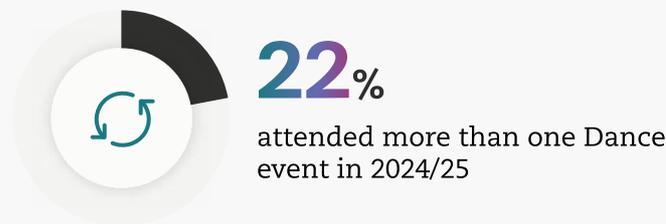
- Home & Heritage**
- Supported Communities**

Change in tickets from 2019/20:



Booking behaviours:

Artform frequency



Advance booking



Why?

Top motivations:

To be entertained

To spend time with friends and family

To be intellectually stimulated

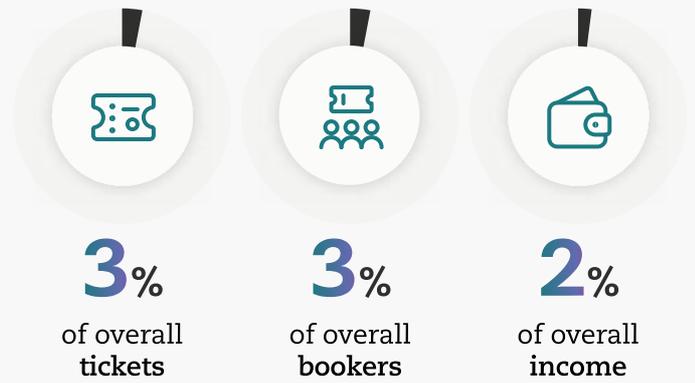


Children & Family

Over half of all family audiences fall into two Audience Spectrum types – Dormitory Dependables and Trips & Treats.

Action this evidence: Use the **Audience Spectrum mapping tool** or explore our Population Profile Reports to find the best areas near you to promote your family programming.

Market share:

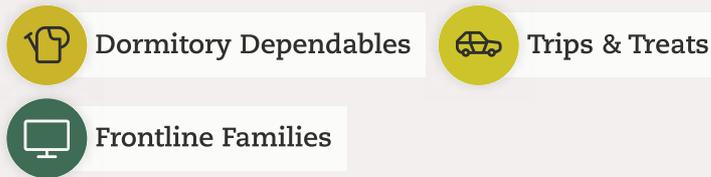


Who?

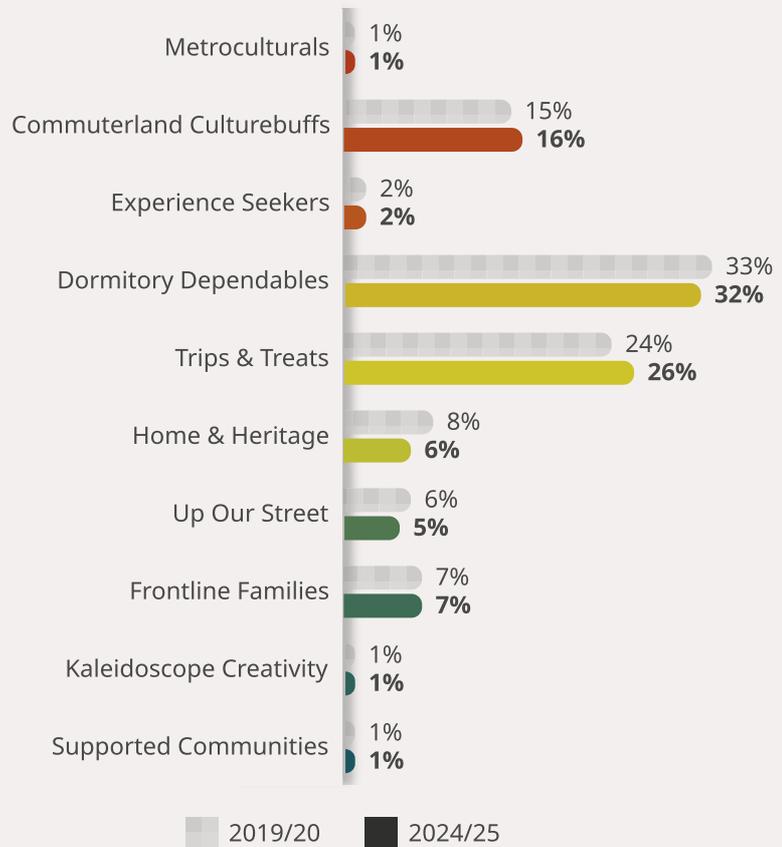
Most bookers are:



More likely than other artforms to attract:

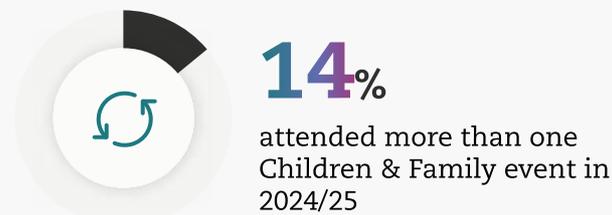


Change in tickets from 2019/20:

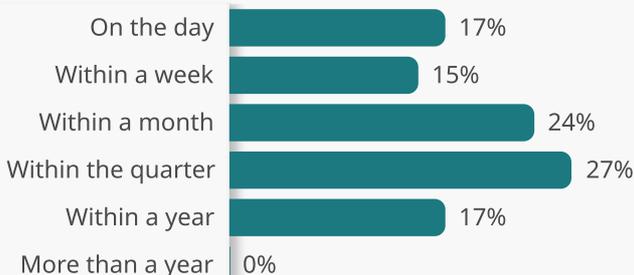


Booking behaviours:

Artform frequency



Advance booking



Why?

Top motivations:

To spend time with friends and family

To entertain my children

To be entertained

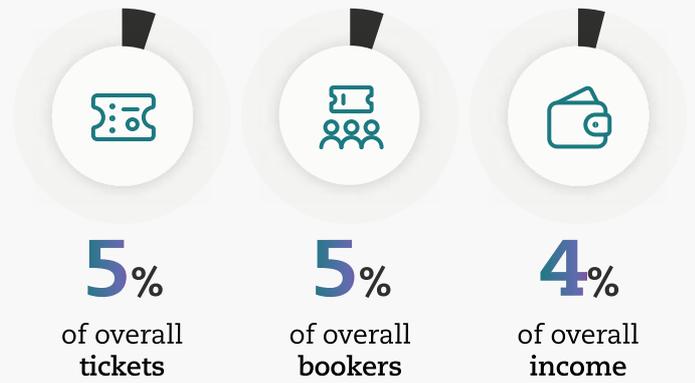


Christmas Show

A large proportion of festive audiences are reliable but infrequent bookers to your venue – an annual treat in the family calendar.

Action this evidence: Plan early and ensure audiences have the ability and incentive post-visit to book ahead for next year, with buy now, pay later schemes to help the festive purse-strings.

Market share:



Who?

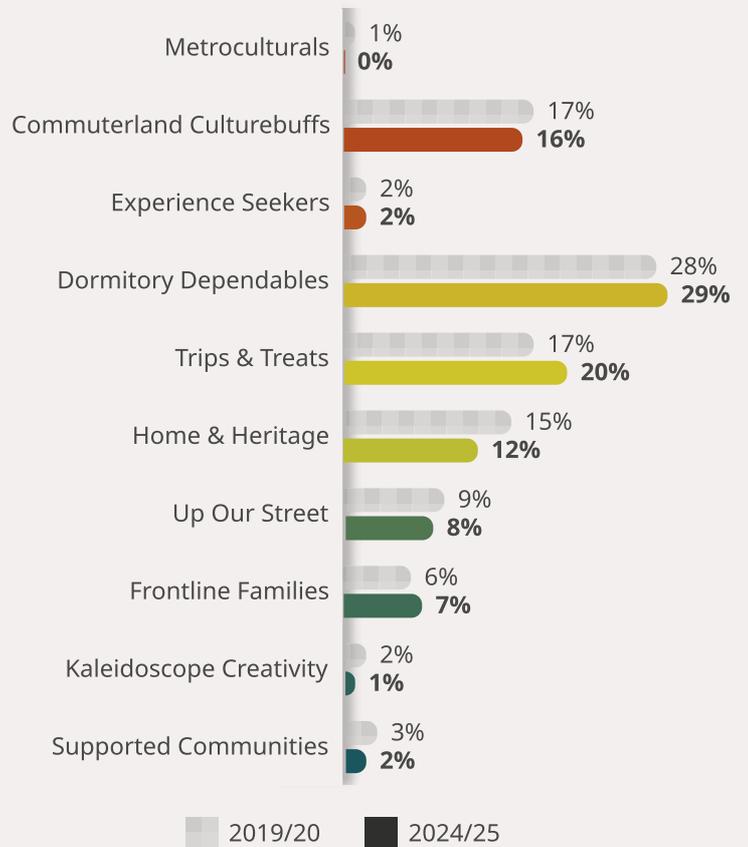
Most bookers are:



More likely than other artforms to attract:



Change in ticket % from 2019/20:

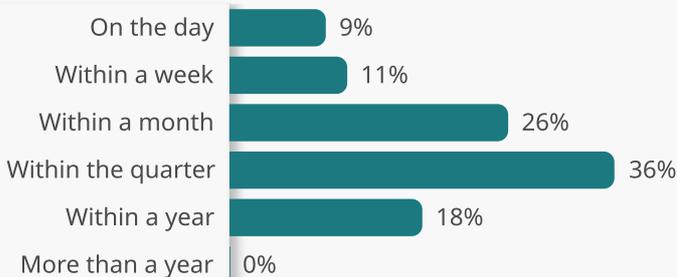


Booking behaviours:

Artform frequency



Advance booking



Why?

Top motivations:

To spend time with friends and family

To be entertained

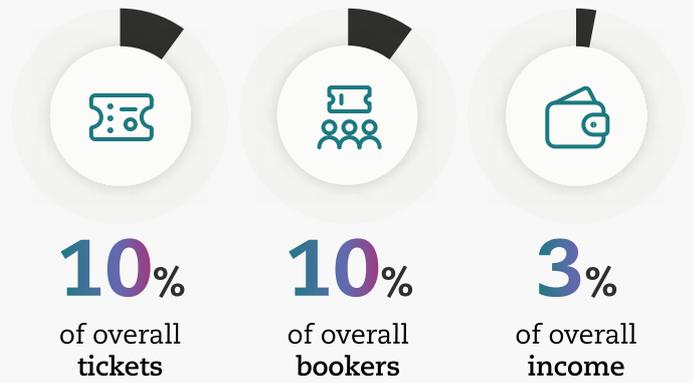
To enjoy the atmosphere

Film

Film events in Wales attract more ultra-culturally engaged Metroculturals and younger, socially motivated Experience Seekers than any other artform.

Action this evidence: With high opportunity for repeat visits, try multi-buy offers and added extras to increase frequency and spend per head.

Market share:



Who?

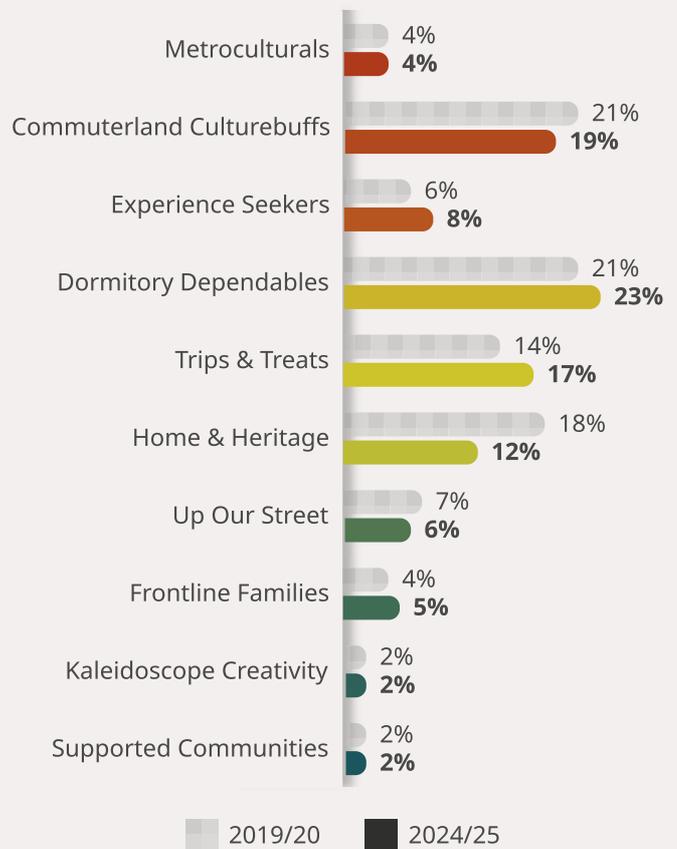
Most bookers are:

- Dormitory Dependables
- Commuterland Culturebuffs
- Trips & Treats

More likely than other artforms to attract:

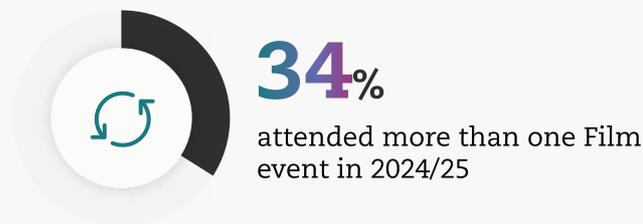
- Metroculturals
- Experience Seekers
- Home & Heritage
- Kaleidoscope Creativity

Change in tickets from 2019/20:

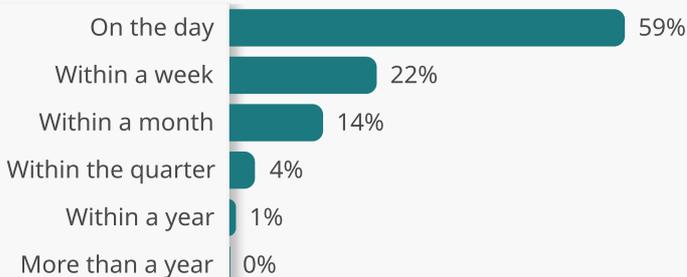


Booking behaviours:

Artform frequency



Advance booking



Why?

Top motivations:

To be entertained

To spend time with friends and family

To be intellectually stimulated



National Overview

Sales

Overall sales volumes at Welsh venues recovered to pre-pandemic levels in 2022/23 and have grown further since. Ticket sales in 24/25 were 26% higher than in 19/20, while the number of performances are only marginally higher (3%), indicating an increase in tickets sold per performance. This contrasts with the wider picture across the UK, where programming increased 25% in the same time period and ticket sales grew only 6% (UK figures from a consistent cohort of 232 venues from Audience Answers)

The growth in ticket income has also been considerable in the same period. Although the 58% increase is a lower 27% increase in real terms, this does mean that the average ticket yield has held up (whilst it dropped 3% across the UK cohort). Overall, this represents a strong performance by Welsh venues.

Sales Compared to 2019/20 (=100)

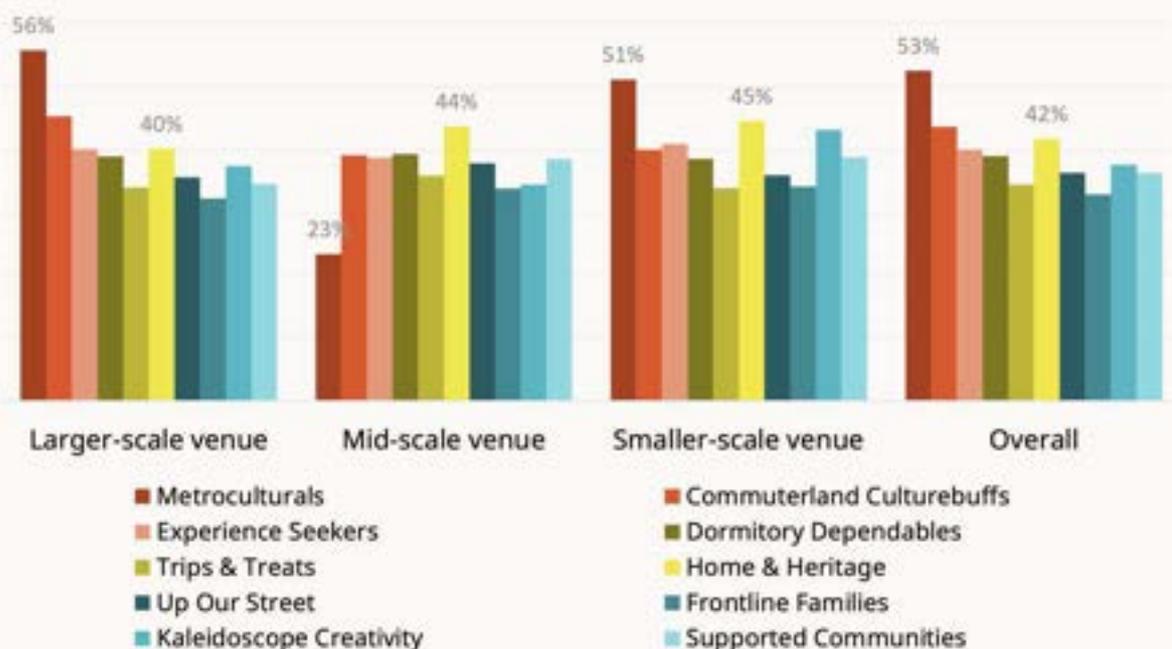


Booking Behaviour

A majority of bookers at all scales only book once (61% at small-scale, 61% at mid-, 54% at large-), rising to c. 80% for once or twice (79%, 81%, 77% respectively) and c.90% for up to four times (91%, 93%, 90%). There was a lower percentage of single bookings at the mid-scale (20%, cf. 30% for small and 29% for large). Around half of bookings at all scales were for two tickets (46%, 46%, 49% for small, mid, large).

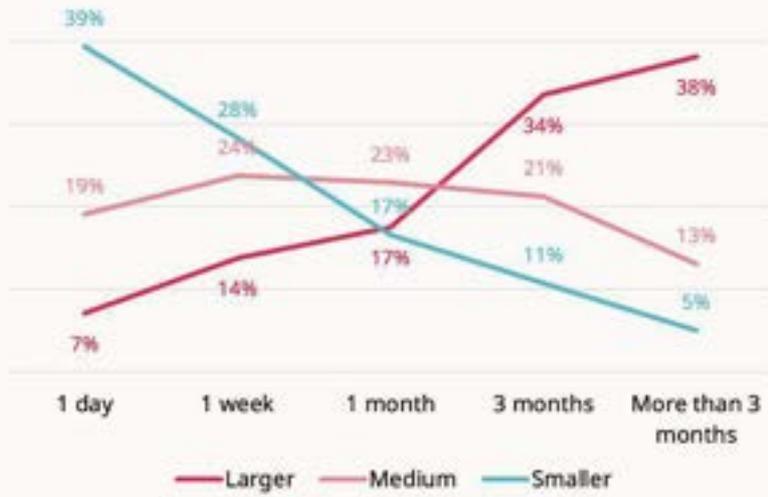
- Frontline Families, Trips & Treats and Up Our Street are a higher proportion of one-off than repeat bookers at all scales of venue.
- Commuterland Culturebuffs are a higher proportion of repeat bookers at the large scale (25% cf. 19% of one-off bookers); Home & Heritage are a higher proportion of repeat bookers for mid- and small-scale venues (16% cf. 13% and 13% cf. 11% respectively).

% Repeat Bookers by Segment



Booking lead times were much higher at large venues than small ones:

Booking Lead Time by Scale



Small venues also had a much greater proportion of single-ticket bookings (30%, compared to 22% for each of mid- and large-scale).

Average ticket prices decreased in real terms from 2019/20 to 2024/25 for the four most popular art forms, but grew for plays/drama (in particular), general entertainment and children/family work:

Real Term Price, 2024/25 cf. 2019/20 Art forms ranked by no. tickets in 2024/25

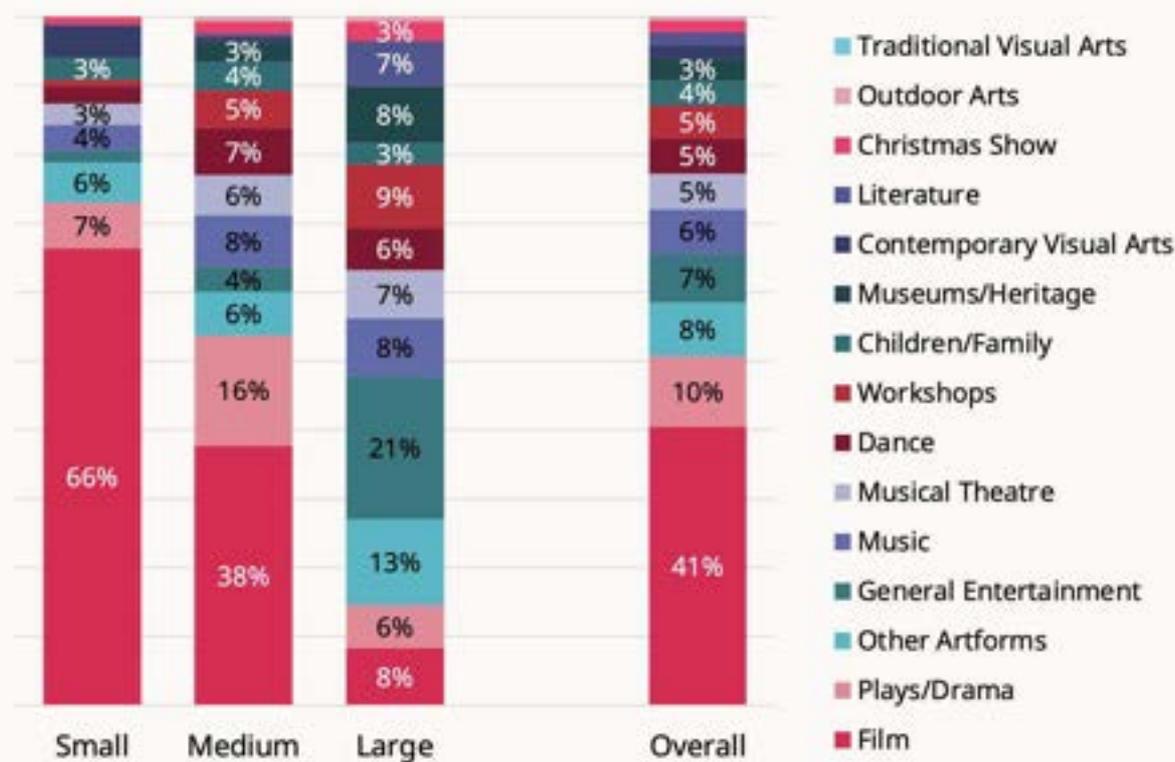


Artforms & Programming

Film was the most commonly programmed art form at Welsh venues in Audience Answers, making up 41% of all events. There was a broad and even spread of other art forms among the remainder, with seven art forms providing 5-10% of total events.

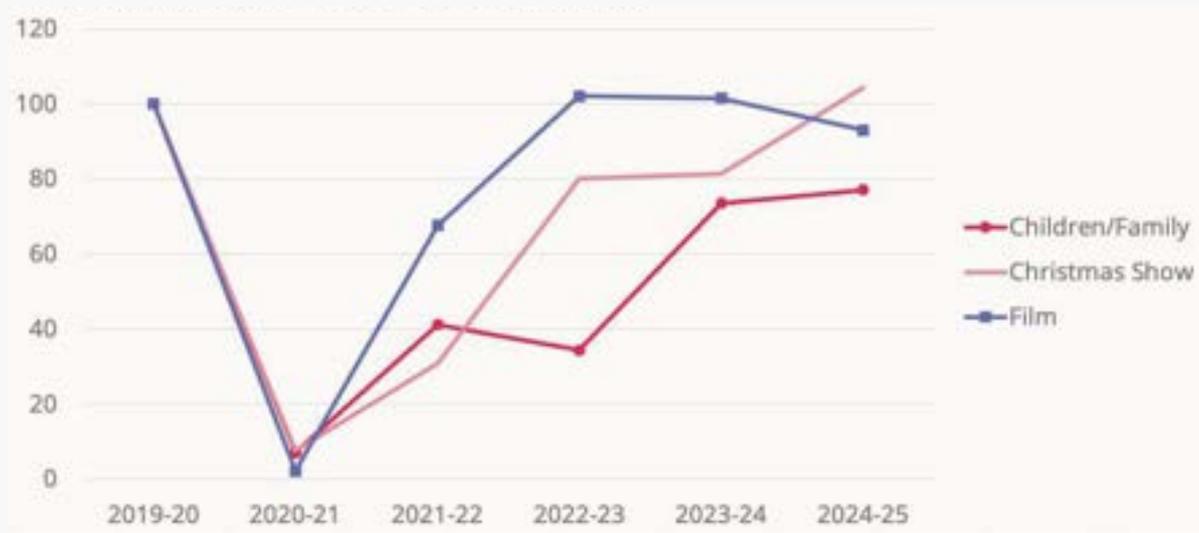
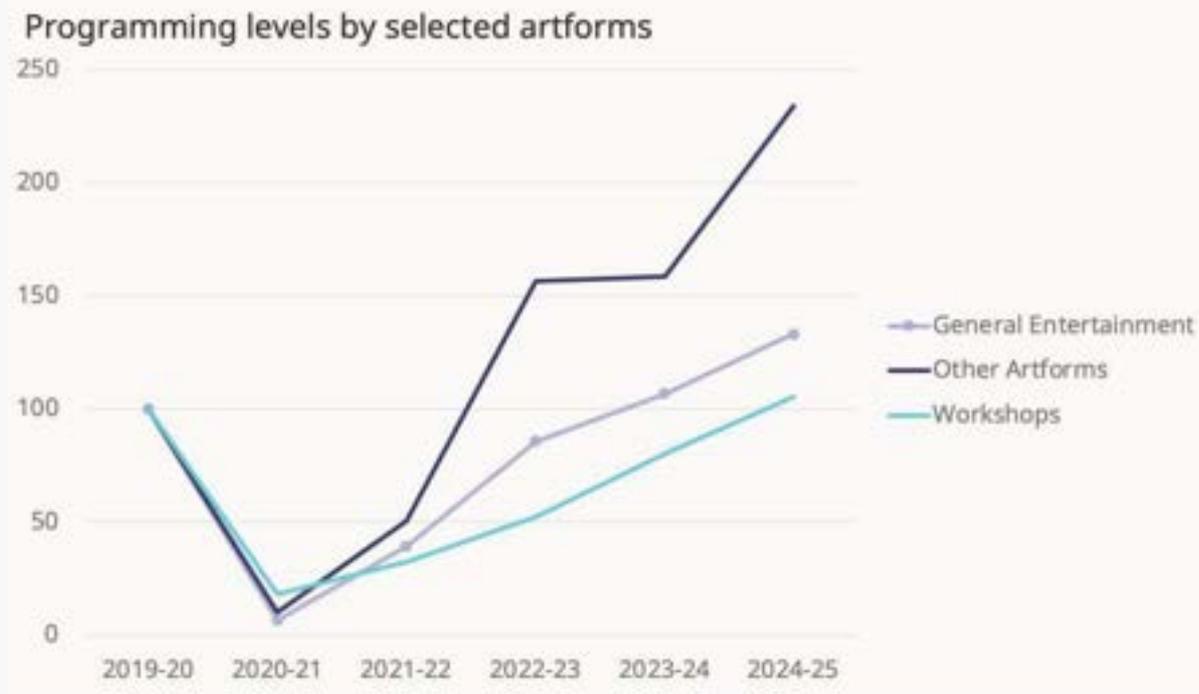
Different scale of venues provide similar amounts of events (35%, 39%, 26%) but very different shares of total tickets (60%, 29%, 11%). The proportions of art forms varied considerably by scale, however:

Programming by Scale

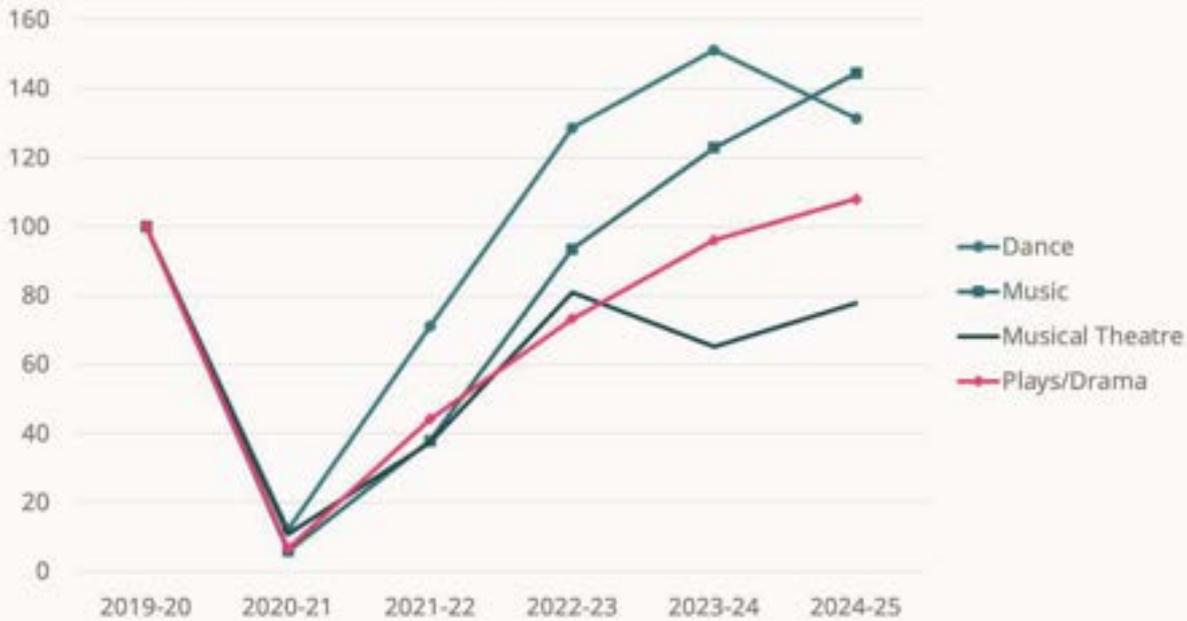


- Films were a higher proportion of events at small venues (66%) than medium (38%) or large ones (8%).
- Less than 7% of events at small and large venues were plays/drama (16% for mid-scale).
- Dance was more common at mid and large scale; workshops at large scales.
- The standard artforms aren't very specific for large venues (31% of events are 'General Entertainment' or 'Other Artforms', but only 8% and 10% for small/mid).

The volumes of programming by art form have changed since 2019/20, with a shift towards less specific, or traditionally-defined, genres [e.g. more 'Other artforms' and 'General entertainment'] and, surprisingly, less 'Children and family' work and 'Musical theatre', but growth in the number of 'Dance' and 'Music' performances (a very different picture from the UK as whole over the same period, where the number of 'Children and family' events grew almost 50% and 'Dance', 'Music' and 'Musical theatre' were at around the same level as before¹):

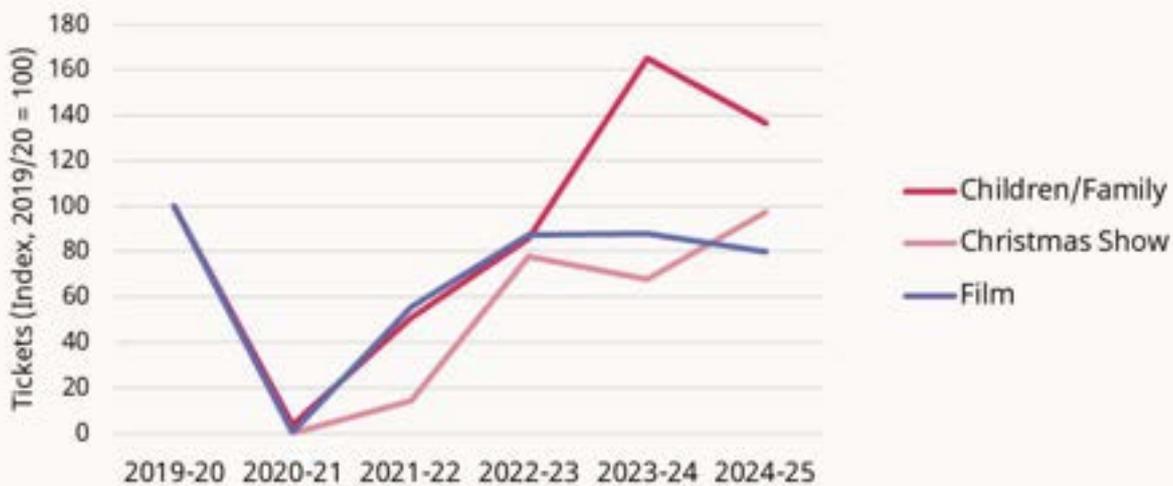


1. NB the UK comparators are based on a consistent cohort of Audience Answers venues. The change in programming for many artforms is more negative when looking at a large and more varied selection of venues, and if focusing on touring work in particular, as shown in analysis of Data Thistle data in our forthcoming report on touring for Arts Council England.



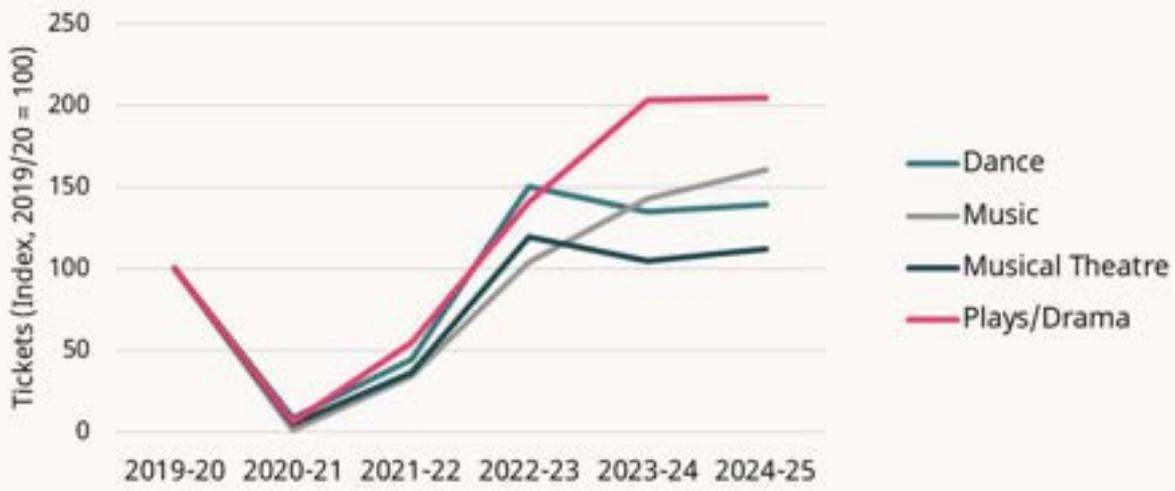
Of particular note is the drop in 'Children and family' work, alongside increases in audiences (Frontline Families and Trips & Treats) that are more likely to attend this art form. This is explained by looking at the change in ticket sales for these art forms, which show greater growth in ticket numbers than events (i.e. higher average attendances per event):

Tickets sold by selected art forms



'Dance', 'Music', 'Musical theatre' and 'Plays/drama' also saw growth in ticket sales equal to, or greater than, the growth of programming:

Tickets sold by selected art forms

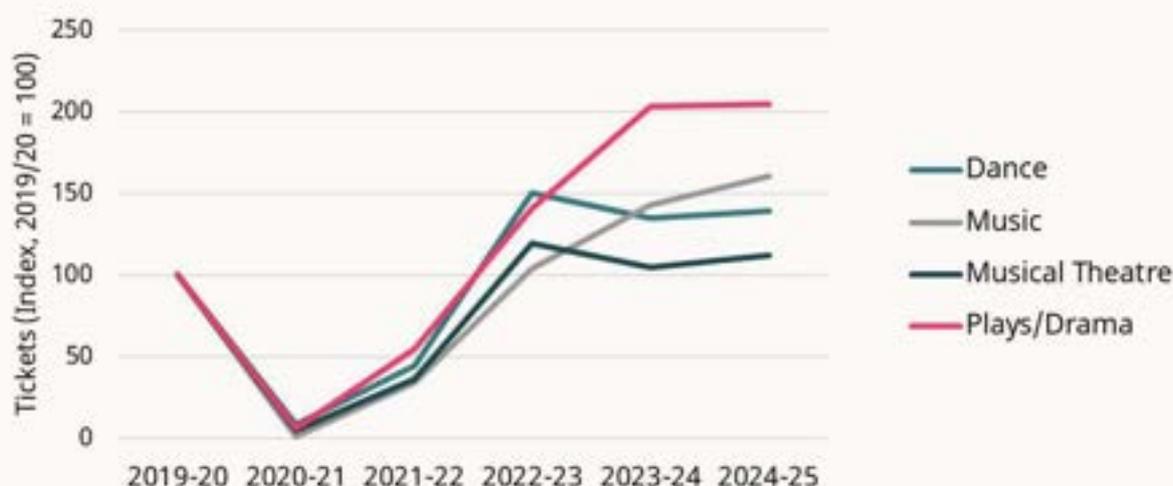


Audience Profile

- 75% of bookers are from four segments: Dormitory Dependables (26%), Commuterland Culturebuffs (20%), Trips & Treats (18%) and Home & Heritage (11%). This compares to 61% of the Welsh population from those groups (18%, 12%, 17%, and 13% respectively).
- Commuterland Culturebuffs are a higher proportion of bookers at the large scale (22% cf. 19% and 15% for small and mid scale).
- Dormitory Dependables are a lower proportion of bookers at the small scale (23%, cf. 26% for both mid and large).
- Both Trips & Treats and Home & Heritage are a higher proportion of bookers at the mid-scale (19% cf. 15% and 17% for small and large scale for the former; 14% cf. 12% and 10% for the latter).
- Both Metroculturals and Experience Seekers are a higher proportion of bookers at small scale venues than mid or large scale (4% cf. 1% and 2% for the former, 8% cf. 3% and 5% for the latter).

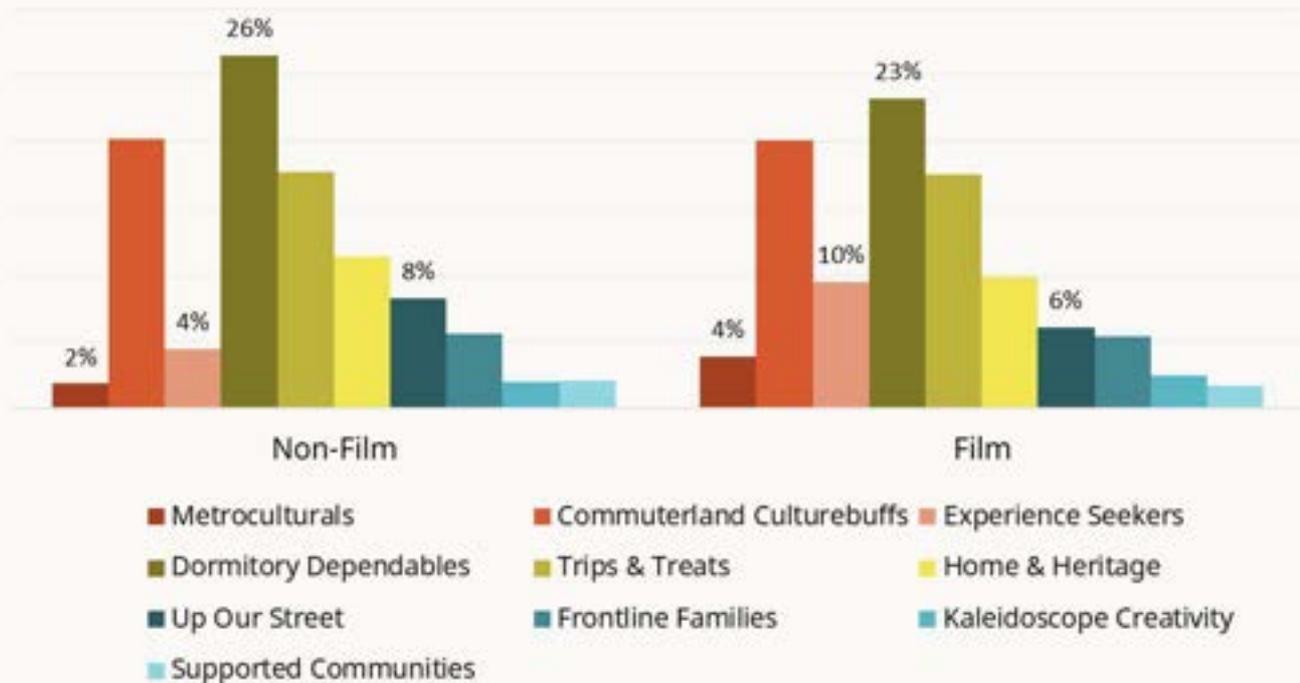
There are high levels of film events, especially at the small scale, and these have a slightly different profile. In particular, audiences that attend film events are more likely to be Metroculturals or Experience Seekers than non-film attenders and less likely to be Dormitory Dependables and Up Our Street:

Tickets sold by selected art forms



Since only 8% of bookers were film-only, this differing profile doesn't change the overall profile much. However, since film audiences are different (and behave differently) from audiences for other art forms and the proportions of film events have changed over time, we have used non-film audiences to show the shift in audience profile over time:

Comparison of Non-Film and Film Audience Profiles



The main shift in profile between 2019/20 and 2024/25 is Trips & Treats growing in proportion and Home & Heritage reducing. In 2019/20, they were approximately even proportions (with Home & Heritage slightly higher). By 2024/25, Home & Heritage was less than 2/3 of the proportion of Trips & Treats. There were also some more modest shifts in the balance between Up Our Street and Frontline Families (proportions of 9% to 5% shifting to 8% to 6%). These both reflect a shift in audiences from older groups to younger ones, with families.

Given the growth in audiences overall, all segments grew in absolute numbers, even those where their share of the total audience fell. The smallest growth was 3% for Home & Heritage; the largest, 68% for Frontline Families (Trips & Treats grew 64%).

Home & Heritage

There's a paradox in the change in audiences in Wales. Wales has a high proportion of Home & Heritage households (13% of population, 11% of bookers in 2019 and 15% on non-film bookers) and this is the group that we've seen decrease engagement most across the UK, down 26% in the UK consistent cohort. This might lead us to expect audiences in Wales to be lower than they were relative to than elsewhere. The opposite is the case.

One factor is the greater regularity of Home & Heritage audiences than most other types. More bookers are repeat bookers among Home & Heritage (42%) than for all but the two highest engaged groups, Metrocultural and Commuterland Culturebuffs and they have the highest proportion of repeat bookers for mid-scale venues (44%). The overall proportion of repeat bookers is 39%.

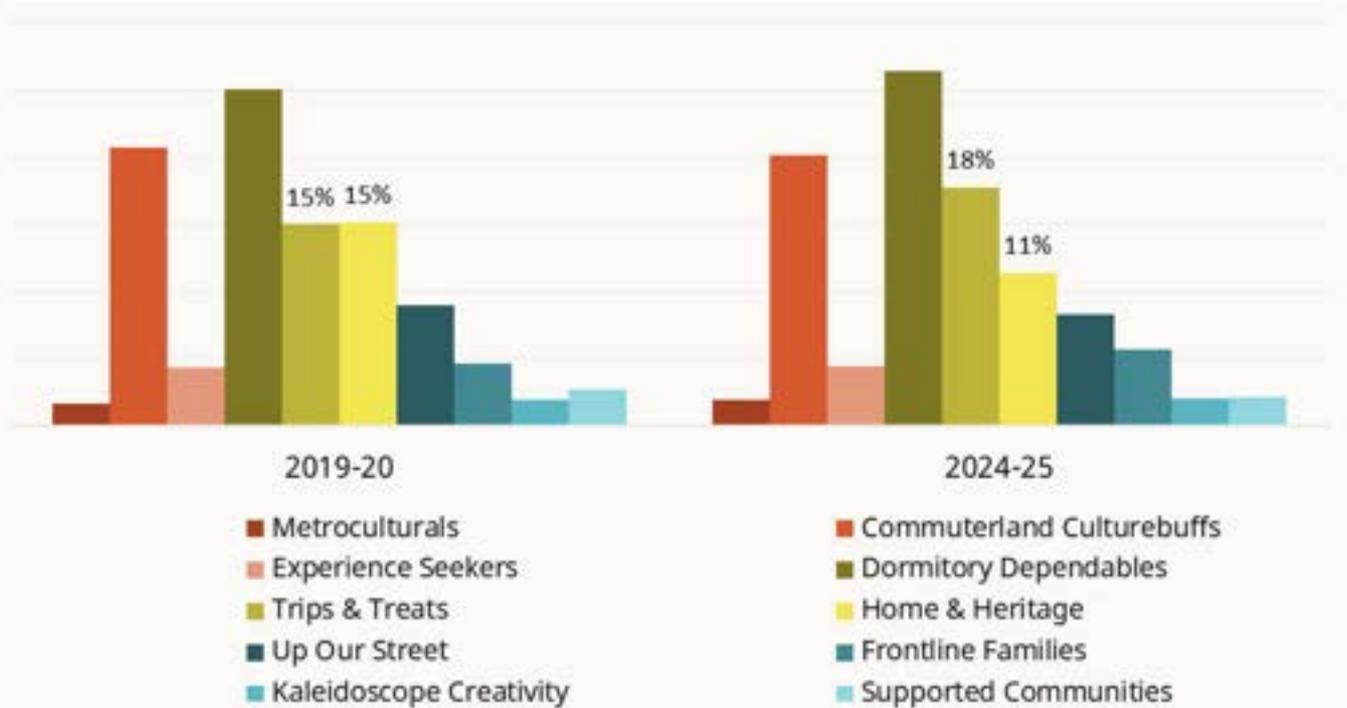
Home & Heritage are more prominent among audiences at mid-scale venues in other ways too: 15% of tickets (cf. 14% at small scale and 10% at large scale); 16% of income (cf. 15% for small scale and 10% for large scale). This segment tends to live in rural areas and attend small and mid-scale venues close to home.

Change in Profile

Engagement by Audience Spectrum type can be summarised in the following diagram. Segments to the right of the 100 line are over-represented in Welsh venues' (non-film) audiences compared to their share of the population. Metroculturals are an extreme, highly-engaged outlier, but Commuterland Culturebuffs and Dormitory Dependables are also notably over-represented. Those to the left are under-represented and include all of the typically 'lower engaged' groups. As you might expect, the overall pattern follows the typical engagement level of segments: lower (blue) to the left, higher (red) to the right, and middle (yellow) in the middle. Experience Seekers are interesting exception, however: a typically higher engaged segment that are under-represented among paid ticketed data, especially once film is taken out. They're culturally interested, but often lack time, money and/or the means to travel to engage in ticketed events in line with their overall level of interest.

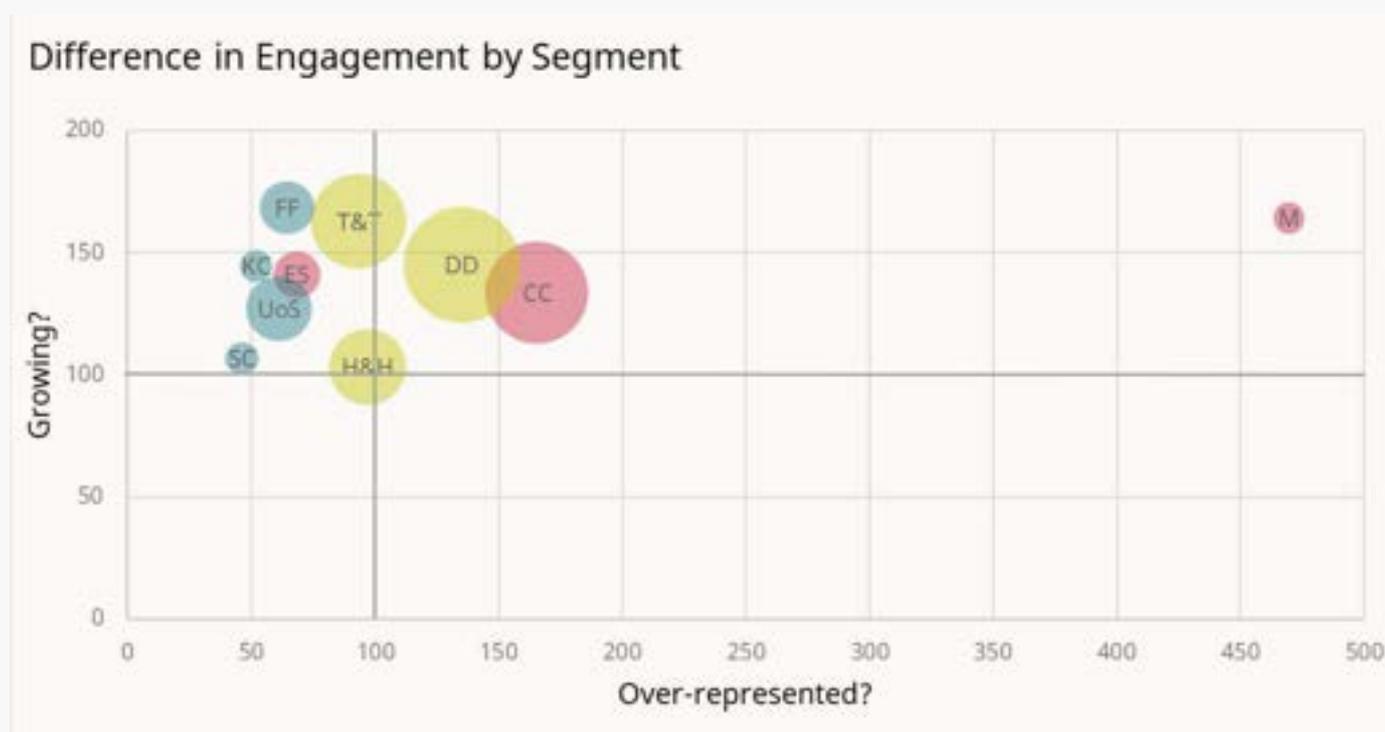
Segments above the 100 line, on the other hand, have grown in numbers of bookers since 2019/20. As noted before this applies to all segments, although some more than others. The proportion of Home & Heritage among all bookers has shrunk, but the number of bookers in that group hasn't. What we do see is biggest growth from Frontline Families, Trips & Treats and Metroculturals. The scaling of the 'bubbles' by the number of bookers makes clear that this latter group, although a notable outlier, is very small.

% Bookers by Segment (Excluding Film)



Summary of Engagement by Artform

Analysis of Audience Answers data gives a detailed picture of the profile of those attending many types of cultural event. This can be supplemented with a population-level summary of engagement from other sources. Target Group Index data shows that there are numerous forms of culture with broad take-up across the Welsh population, with popular music highest, followed by theatre (72% also say that they 'ever' go to the cinema):



For context, in the 2022/23 National Survey for Wales, 72% of respondents said that they had attended or participated in arts, culture, or heritage activities at least three times in the previous year.



Appendices

About the Data

This report analyses the aggregated dataset of all Welsh organisations using the Audience Answers survey and ticketing tools.

That data included 9215 responses to Audience Answer surveys in 2024/25 and booking data from 1,728,404 tickets sold in the same period. Only tickets with a price greater than 0 were included in the analysis.

Additional benchmark data analysis came from Local Market Size Estimate (LMSE) data, and the Census.

Participating arts organisations

Aberystwyth Arts Centre

Articulture

Beyond The Border Storytelling Festival

Blackwood Miners Institute

Blaengarw Workman's Hall

Borough Theatre

Brecon Jazz Club & Festival

Chapter Arts

Congress Theatre

Elysium

Ffotogallery

GS Artists

Galeri

Glynn Vivian Art Gallery

Greenfield Valley Heritage Park

Hay Festival

Hijinx

Llangollen International Musical Eisteddfod

The Hafren

The Lyric

Volcano Theatre Company

Wales Millennium Centre

Welsh National Opera

Wyeside Arts Centre

Y Muni Pontypridd

yMa

Maesteg Town Hall

Memo Arts Centre

Mission Gallery

National Dance Company Wales

National Eisteddfod of Wales

National Theatre Wales

NoFit State

Pontardawe Arts

Royal Welsh College of Music and Drama

Sherman Theatre

Swansea Grand Theatre

Taliesin Arts Centre

The Ffwrnes

The Metropole

The Miners

The Other Room

The Welfare

Theatr Brycheiniog

Theatr Clwyd

Theatr Colwyn

Theatr Felinfach

Theatr Mwldan

Torch Theatre

Tŷ Pawb

UPROAR – Wales' New Music Ensemble

Venue Cymru

About The Audience Agency

The Audience Agency is an independent research and development non-profit, whose purpose is to enable a thriving, people-centred cultural sector.

We provide research, insight and data driven tools which help our clients and stakeholders adapt for and with their audiences.



FOR



Cyngor Celfyddydau Cymru
Arts Council of Wales

Audience Answers in Wales

Did you know that any cultural organisation in Wales can access free support to understand their audiences better?

Funding from Arts Council of Wales has meant that since 2019 all organisations in Wales have been able to access free audience insight services provided by the Audience Agency's team of consultants and support specialists.

audienceanswers.org/wales

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- Page / 03 4x10 rehearsals, *Imprint* by June Campbell Davies, photo Kirsten McTernan, with permission from National Dance Company of Wales.
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**Many thanks for
taking an interest in
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