

Report on the tender of

Welsh Language Marketing

Arts Council of Wales



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1. INTRODUCTION

It is a pleasure to present this report on Welsh language marketing to the Arts Council of Wales (The Council). This is the culmination of research undertaken by us between May and October 2020.

This research supports the Council's commitment to develop and promote the arts in the Welsh language, as everyone has the right to explore their own culture and its creativity in their language of choice, be they users, participants or artists. Welsh language marketing is crucial in that it provides information to Welsh-speaking audiences in their language of choice¹.

We were commissioned by the Council to assess current Welsh language marketing methods and activities across the arts sector in Wales. We were asked to assess whether this was the most effective and efficient way of engaging with Welsh-speaking audiences, professional artists and participants.

We wish to thank the Council for the opportunity to contribute to its commitment to develop and promote the arts in the Welsh language. It should be noted that this work was commissioned in February 2020, a month before the COVID-19 lockdown. Thanks to flexibility on both sides, it was agreed to delay the research for a while so that we could respond sensitively to the uncertainty within the sector, and for us to present the most appropriate assessment, fit for society's new post-Covid landscape.

Although we still face a high degree of instability in relation to the short- and long-term future of the arts during the writing of this report, we trust that this snapshot will help the sector with its plans to resume arts events and engage with its audiences over the coming months and years. We present this report to share the main findings of our assessment of Welsh language marketing in the arts, having assessed its effectiveness and presenting recommendations on the way forward. The main findings of the assessment are shared in Section 3, and the recommendations in Section 5. There is close correlation between this work and the recent [Welsh Language Mapping Report](#). Combining the recommendations of both reports would provide a real opportunity for the Council to lead positive change as the sector prepares to attract and engage with Welsh audiences, old and new.

¹ For the Benefit of All: Corporate Plan; Arts Council of Wales 2018.

1. METHODOLOGY

We were commissioned to undertake the work in February 2020, with the aim of conducting the main research in the spring and presenting the report by the summer. Following discussion with the Council, it was agreed that we would delay the fieldwork during lockdown, and resume in May 2020.

The aim of the work was to assess whether current Welsh language marketing methods are the most effective and efficient in terms of reaching Welsh-speaking audiences, professional artists and participants. The work included:

- desktop research into Welsh language marketing material currently available (hard copy/online/social media platforms)
- working with Welsh-speaking groups and individuals to gather opinion on Welsh language marketing materials/activities across the sector
- coordinating with every art form in the sector to identify good practice, gaps in provision and to consider what assistance is needed

The first step was to identify the main themes of enquiry for this assessment which would form the basis of the research. It was decided to focus on four main themes:

- i) **What attracts an audience** to attend a Welsh language art event;
- ii) **Current marketing techniques**;
- iii) **The Welsh language** in arts marketing;
- iv) **Accessibility** in attracting Welsh audiences.

Desktop research

A sample of marketing materials was gathered to identify good practice and any gaps in provision. The category was divided into three:

- print marketing materials (posters, promotional leaflets and programmes)

- digital materials (websites, web presence)
- social media

Samples were collected from 34 companies across the sector and across Wales. The findings of the desktop research inform the content and recommendations of this report. The materials collected are listed on page 53 in the Addendum.

Regarding the research sample, it was necessary to engage with the sector as well as the audience. In the case of the sector, owing to many institutions and venues being closed and/or their staff on furlough during the contract period, it was agreed with the Council that we would focus our fieldwork on Arts Council Portfolio institutions, as well as other individuals or projects that had received Arts Council funding.

Discussions were held with a sample of 30 individuals/companies in the sector between May and September 2020 which represented a cross-section of the whole sector. Those conversations informed the content of this report. The individuals/companies are listed on page 52 in the Addendum.

As to audience engagement, this element was divided into quantitative and qualitative research.

Quantitative

In order to reach as many people as possible, a bilingual online survey was created on Survey Monkey, based on the four themes of enquiry above. The survey was shared through the Council's networks, Venues, via social media and community partners such as the Mentrau Iaith.

A total of 413 complete responses were received across Wales. Responses were received from all counties, with the highest level of responses coming from Cardiff (27%), Gwynedd (14%) and Carmarthenshire (14%). 89% of respondents were fluent Welsh speakers, 6% could speak a little

Welsh, and 4% were Welsh learners². 74% of the whole sample considered themselves to be female, 25% male, and the remaining 1% were either intersexual, other or preferred not to say.

The template questionnaire is included in the Appendix.

Qualitative

To support this quantitative work, we were keen to conduct focus groups across Wales to hear the views of the public and to discuss some of the themes in more detail. The original plan had been to conduct four face to face focus groups, one in each region (north-west, north-east, south-west, south-east). Because of lockdown the focus groups were adapted and held on Zoom over the summer. It was marketed as an 'Opportunity' on the Council's website; the opportunity was shared on social media; the focus groups were advertised through Welsh language community networks such as the Mentrau Iaith and through sector networks such as the Venues. Groups were also directly targeted.

A total of 11 discussions were held on Zoom with the public, varying from focus groups of up to 10 individuals to 1:1 discussions. The following focus groups held on Zoom form part of the research:

- i. North-west
- ii. North-east
- iii. South-west
- iv. South-east
- v. Welsh learners
- vi. Young people 16-24

² The figures in the report have been rounded up to the nearest whole percentage. Therefore, totals may not always be equal to 100.

vii. Disabilities

30 individuals contributed to the above focus groups on Zoom, as well as the 413 who responded to the online survey.

In order to benchmark against another national institution which is not part of the arts sector, but which also engages with Welsh-speaking audiences, we held a discussion with S4C, and we refer to some of these points within the report.

This assessment of Welsh language marketing in the arts has involved engaging with the entire arts sector in Wales. Although we discuss the whole sector in our assessment, it should be noted that nearly all the conversations turned naturally to discussions of experiences mainly related to theatre and drama. Although there are findings in relation to other arts, we suggest that the tendency among the public, and the sector to some extent, to discuss drama and theatres suggests a natural, traditional link between the Welsh-speaking audience and this type of art, from the perspective of tradition and the availability of the art form in Welsh. This point is confirmed in the online survey, with 64% of the public noting that they had attended a Welsh language play in the last 18 months, followed by art festivals and live music at 49% and 47% respectively.

Our discussions with the sector, our quantitative and qualitative research with the public, and the sample of marketing materials considered all inform the main findings of this assessment. The next section reports the main findings.

3. MAIN FINDINGS OF THE ASSESSMENT

The main findings are presented under the four main themes of enquiry below, and include the views of the audience and the sector.

3.1 What attracts an audience

3.2 Current Marketing Techniques

3.3 The Welsh Language

3.4 Accessibility

3.1 WHAT ATTRACTS AN AUDIENCE

According to the 2019 Wales Omnibus Survey, 92% of Welsh-speakers frequent the arts once a year in Wales. This compares with 85% of non-Welsh-speakers.

In order to consider why this audience attends arts events, we have used data from the Audience Agency³, which collaborates with the Council to provide audience information for the sector. Audience Agency surveys divide audience groups into 10 different segments of people who engage with the arts, and the data is on a UK level. This data is based on the original segmentation in England, but is the only current set of similar data available to us in Wales at present.

In Wales, 49% of the people who frequent the arts fall into three different groups, namely ‘Trips and Treats’, ‘Dormitory Dependables’ and ‘Up My Street’. We will refer to these groups’ features, showing how they correspond to (or contradict) our research findings below.

The Audience Agency has data that indicates that the main reason why people in Wales frequent the arts is to be entertained⁴. This provides context to our discussion in this report.

The Product

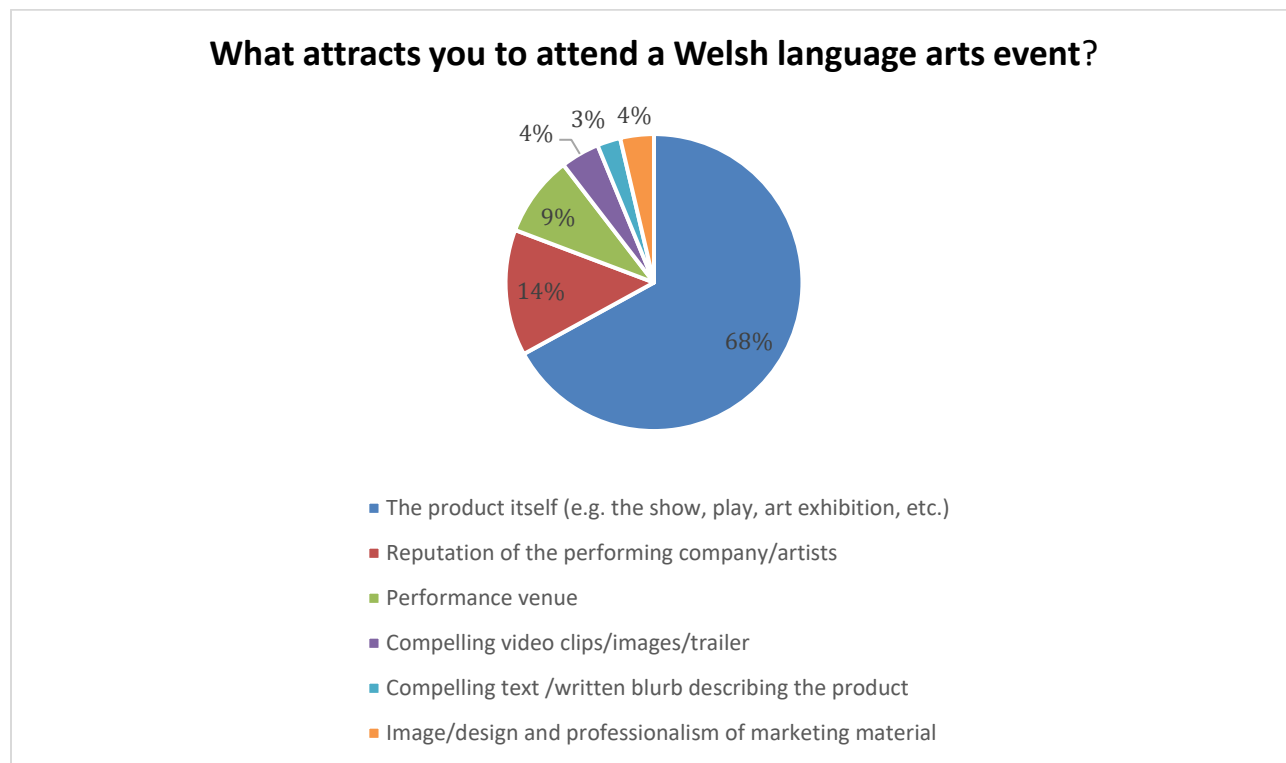
In our online survey, respondents were asked to rank the following in order of their importance in attracting them to a Welsh language event. The choice was the product itself (e.g. the show, the play, the art exhibition etc), the performance company/artist’s reputation, the

³ <https://www.audiencefinder.wales> Accessed November 2020.

⁴ <https://www.audiencefinder.wales/data> Accessed November 2020.

venue/performance location, memorable video clips/images/trailer, catchy text copy/blurb, image/design and professionalism of the marketing material.

Figure 1



The product itself was the preferred choice with 2 in 3 people, or 68% of respondents stating that it is mainly the product itself that attracts them. The performance company/artist’s reputation was second (14%) and third was the performance venue or location of the arts event (9%). These main factors of initial audience attraction must therefore be understood to enable appropriate marketing and targeting. It is interesting to note that the least favoured element in attracting audiences was the image/design and professionalism of the marketing material, yet the sector often invests a lot of time and budget in these elements, as discussed below.

Before embarking on a marketing plan, the starting point is the product itself. Most venues reported that an appealing product helped them promote the event, and they base their marketing campaigns on this product. This combination of an appealing product and marketing

campaign is crucial as a basis for attracting an audience and is true of marketing arts work in any language.

Although the scope of our study does not include gathering opinions on the arts product, there is close correlation between the product and what attracts individuals to events. In all focus groups it was said that the product itself and reputation (be that the reputation of the company/artist/producer or author) would be enough of an enticement for them to attend an arts event.

It was clear from the focus groups that audience opinion and taste were not always based on factors such as age or geographical area. For instance, according to frequenters, it is possible that older audience members in rural areas would also want to be challenged with new fringe products, such as would be presented in more urban areas, and the majority of frequenters were of the opinion that in theatre, more safe and traditional productions tended to be targeted at rural areas. Other frequenters discussed the counter-argument to this, that audiences in some rural areas had become used to experiencing more traditional Welsh language arts events, possibly influenced by the great work of movements such as Young Farmers Clubs. This was supported by a comment in the online survey:

“It’s not easy to get some people in some rural areas out of their comfort zones. Companies are afraid of experimenting in rural areas”.

If the product itself is one of the main factors that will draw an audience to an arts event, and if we consider that the Council wants ‘to reverse recent declines in audiences for Welsh language theatre’⁵, we need to consider whether the Welsh language audience actually has an opportunity to express its opinion to the sector about what it enjoys, and the arts product that would draw them in future.

⁵ For the Benefit of All, Arts Council Wales, Corporate Plan 2018 - 2023.

The Experience

When focus groups were asked what attracted them, they offered examples showing that the arts event needs to offer something that promises to be a good experience. One of the main Audience Agency segments in relation to the audience in Wales - 'Dormitory Dependables' – frequent the arts to be entertained, to socialise and to relax⁶. There were several interesting discussions about this concept of 'experience'.

It was said in the focus groups that 'the experience' of frequenting the arts included the location of the event itself. Individuals challenged the practice of putting on Welsh language arts events in traditional arts venues (e.g. the art gallery, traditional theatre, village hall or local secondary school hall). From what we already know, that frequenters wanted to feel that they were having a positive experience, there was a desire among individuals to see Welsh language arts tours and events being more experimental by going to alternative locations and venues. Examples of good practice were mentioned, including events held in tepees, or tents being erected within rooms to create a particular atmosphere.

Furthermore, individuals were very interested in seeing Welsh language arts events making an effort to go into the community, rather than expecting the community to go to the venues every time. This would include companies reaching out and performing arts events in e.g. rugby clubs, pubs or other community locations. The advantage would be having a ready-made local audience, who would be familiar with the location and would therefore feel at home there. However, if arts events were to be toured around communities, it was emphasised that it would have to be done in partnership between the arts sector and the local community from the very beginning, and that a local audience could not be expected to attend an event simply by identifying a community location; trust and collaboration on both sides would have to be nurtured from the start.

In our discussions with the sector, the importance of the experience itself as a major marketing factor was not highlighted by the majority of venues and production companies, despite being

⁶ <https://www.theaudienceagency.org/audience-spectrum/dormitory-dependables> Accessed November 2020.

such an important feature in audience focus groups. Looking at the sector's marketing materials, the majority did not include much about what the audience could expect of the experience itself. In that respect, it is often difficult to find information about things such as the event running time, whether there is an interval, and what to expect from the experience. Being as open and transparent as possible about the experience makes it much easier for the individual to decide whether to attend. The Audience Agency says the following about 'Dormitory Dependables':

The offer will be received more enthusiastically when it is geared towards an emphasis on the experience and all its trappings, rather than any overly deep focus on the artistic merits of the event⁷.

In this respect, the sector needs to consider marketing the experience from the outset. We will discuss the Welsh experience of attending the arts in Section 3.3.

Duty

Linked to the above point, one factor mentioned by individuals in areas where not many Welsh language events are held is the sense of duty to support Welsh language arts:

"If I don't go, who will?"⁸

This view was confirmed by many frequenters. Although it could be argued that influencing someone's conscience is not a marketing technique in itself, it is certainly a factor that influences individuals' behaviour, and it is important that we understand this. In addition, under circumstances with no COVID-19 restrictions, given that attending an arts event often involves spending money, possibly leaving the house after work, and travelling to another area, some argued that the experience needed to offer a promise of something special. Loyal supporters of Welsh language arts noted that they often tried to take a full car of people with them to a Welsh language event, and that this would include people who would not otherwise have had the experience.

⁷ <https://www.theaudienceagency.org/audience-spectrum/dormitory-dependables> Accessed November 2020.

⁸ Focus Group 2020.

“I take a full car with me, so I want them to enjoy themselves.”⁹”

In this respect, it was argued that the event had to offer the promise of a good time because of the sense of responsibility for the other people’s experience.

Peer influence

Mainly among young people in the focus groups, an important factor that attracts them to attend Welsh language arts events is the influence of other people. Individuals noted that they were more likely to attend a Welsh language arts event if they could see that peers, or people who they admired, spoke positively about a Welsh language arts event. This will be discussed further in the next section.

Participation

Participation and engagement projects are a highly effective way of attracting audiences, and are a priority for the Council as noted in its 2020-2021 Operational Plan, namely *‘to develop and implement new widening engagement programmes with the arts in Wales through the medium of Welsh and English languages’*. By working with the community to offer them the opportunity to be part of the event itself, it can be a way of attracting families and friends to support and see them at the event. There are several examples of participation, including Arts Care Gofal Celf who has been running participative arts programmes across the counties of Carmarthenshire, Pembrokeshire and Ceredigion for over 25 years¹⁰, Opra Cymru working with local choirs on a national level, Dawns i Bawb providing community classes and education activities in North west Wales, Theatr Felinfach working with the community and professionals on *Teilwng yw’r Oen*, to name but a few. It can be a powerful marketing tool as it offers a personal link between the audience and the event, and this is a way of attracting them. As noted in the online survey:

⁹ Focus Group 2020.

¹⁰ 2020-2021 Operational Plan; Arts Council of Wales.

"Getting the community involved in the performance is important. Tylwyth has also done this, using choirs to be part of the performance. This can help to draw an audience and develop an audience."¹¹

Attracting a Welsh-speaking audience

When it comes to attracting a Welsh-speaking audience, it should be asked whether a different type of marketing approach is needed. In discussion with the sector, venues and production companies noted some features of the Welsh-speaking audience which they considered when trying to appeal to them:

- They tend to book their tickets later
- The need to have heard reviews / other people's recommendations
- Theatres, specifically, believe the Welsh-speaking audience generally to be very loyal to Welsh language theatre when available

These are perceptions rather than facts but are a consistent pattern in discussions with the sector, and it is important that they are considered when planning a marketing campaign.

However, when venues and production companies were asked whether they marketed differently when trying to draw a Welsh-speaking audience, the answer was usually that this did not happen. Digging deeper, it was noted that they tended to reach further into the community, naturally targeting Welsh-speaking community groups and organisations – a practice that would not necessarily be seen when marketing English events. This practice should be consistent across the whole of Wales and the arts in Wales. There is further discussion of this under theme 3.2 (Current Marketing Techniques).

Marketing material

It is interesting to note the online survey result (figure 1 above) about what attracts an audience to arts events, and that the three main elements are actually beyond the influence of marketing departments. In our conversations with the sector, the emphasis was on the importance of

¹¹ Online Survey 2020.

marketing material and video material as marketing tools, so it is interesting that these were less important factors to the audience.

Generally, across the sector, our assessment shows that marketing materials are of a high standard and eye-catching. We suggest that the sector should keep some important features in mind:

- the need for catchy copy; marketing copy tends to be long
- the need to emphasise the experience itself in the copy; what people can expect if they attend the event
- an eye-catching image which works in several forms – on a poster / leaflet / programme / web
- promotional video which works in several forms – on various social media and digital platforms

Welsh language considerations on marketing material are discussed in Section 3.3.

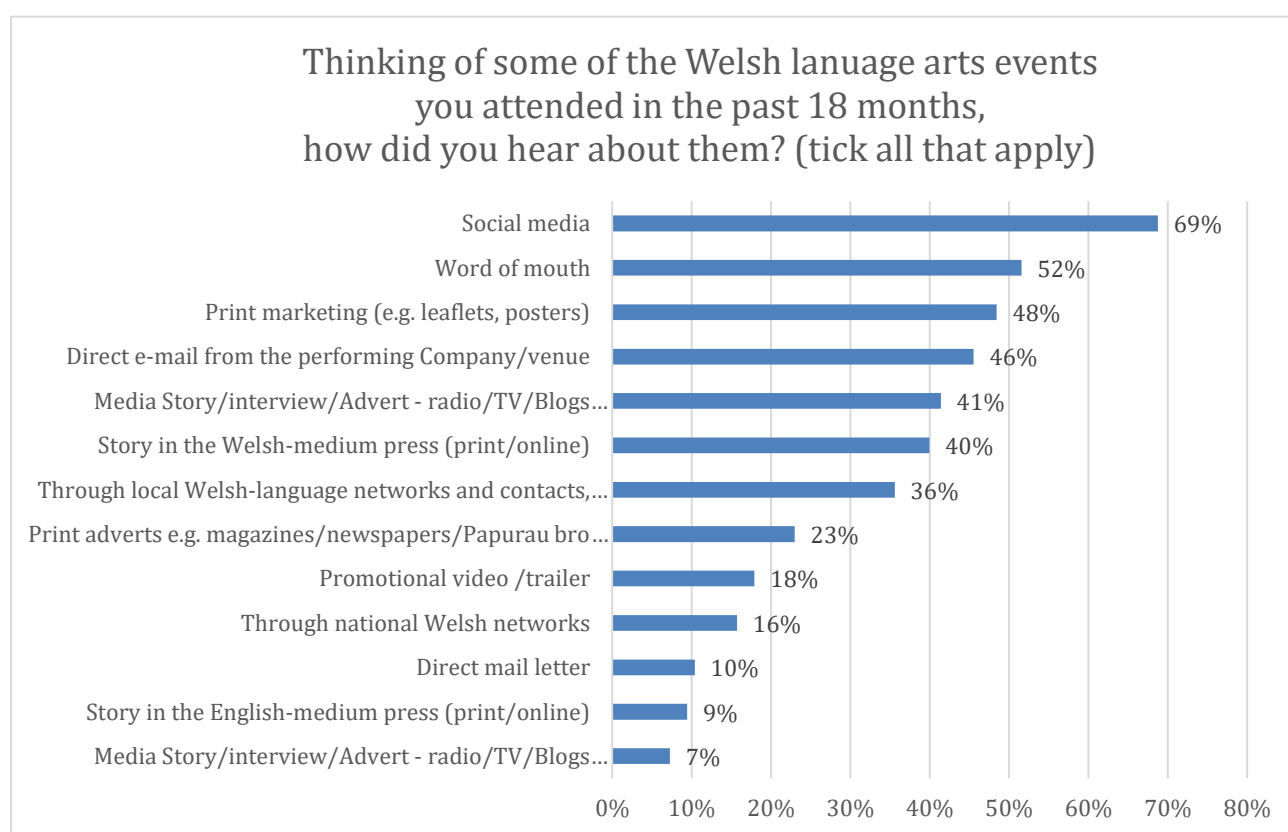
Although there are some good practices, our desktop research showed that some of these elements were occasionally missing. We believe that they are important when considering the audience's needs and their different methods of accessing information, as is seen in the next section.

3.2 CURRENT MARKETING TECHNIQUES

The first section discussed what attracts audiences to Welsh language arts events. In this section, we will consider how audiences hear about arts events and the marketing techniques currently used to reach them.

In the online survey the public were asked how they had heard about Welsh language arts events over the past 18 months:

Figure 2



69% of respondents noted that they heard about them through social media; 52% via word of mouth, 48% through print marketing (leaflets/posters), 46% through direct email from the company. Following that, the Welsh language media, press and local Welsh language networks and contacts, at 41%, 40% and 36% respectively. Variety in relation to marketing techniques is still relevant to the Welsh-speaking audience.

Comparisons can also be made with this data according to age groups. For instance, 67% of respondents aged 16-24 noted that they heard about events through social media, which is similar for respondents aged 55-64, at 68%. 42% of respondents aged 16-24 also noted that they heard about events through print marketing, compared with 45% of respondents aged 55-64. This tendency was also confirmed in focus groups, so the use of social media or print marketing does not appear to be particularly relevant to specific age groups only.

Discussed below are some of the other main themes noted in the focus groups, and with the sector, regarding the ways that audiences hear about arts events/the marketing techniques currently used to reach them.

Social media

45 million individuals in the UK use social media and the number is increasing every year¹². Of those users, 102 minutes are spent on social media every day.

The data in Figure 2 above notes that 69% hear about events through social media. The Audience Agency describes the digital tendencies of the 'Trips and Treats' segment as follows;

They are likely to use the full range of platforms depending on what they're doing – Facebook, Twitter, YouTube, Pinterest. Many own smartphones and download a large number of apps. Downloading or streaming music using Spotify is also common. They much prefer contact by email than phone or in person.

Despite the use of these platforms, a common theme in focus groups was that social media had become very busy, especially over the pandemic period, and that messages and advertisements can be lost in the social media 'noise'. Given the key role of social media and digital marketing, companies and venues in the sector have to make the most effective and efficient use possible of social media to compete and grab the audience's attention across platforms, whilst balancing this with more traditional methods.

¹² <https://www.statista.com/topics/3236/social-media-usage-in-the-uk/> Accessed 2020.

Cwmni'r Frân Wen is an example of a company that engages effectively with the Welsh-speaking audience on social media platforms. The company was named by the public in focus groups as an example of a company that makes effective use of social media. They have invested resources and effort into developing audience engagement on social media – to grab the audience's attention so that they feel that they have a relationship with the company. Their social media channels are full of engaging content and short videos with company branding.

Literature Wales was also noted in our desk research as a company that communicates clearly and purposefully with the audience on social media. They succeed in being professional but with a playful element, and not all messages are an exact translation of Welsh/English. Both languages manage to work alongside each other, offering something a little different, but in a natural way in Both Welsh and English.

Advertising on social media can be an effective way of reaching specific audiences. Several people in the sector noted that advertising on Facebook that targets the Welsh-speaking audience is very difficult as it is challenging to identify Welsh-speakers. Although individuals can change their Facebook interface to Welsh, it is not possible for the companies to identify a specific cohort of Welsh-speakers. The Council may wish to consider providing further training for the sector on using adverts to target Welsh-speakers on social media.

Advertising on Google can be a great way to reach a wider audience. This is the main way in which S4C advertises on the web¹³, and they see this as an effective way of advertising and reaching audiences. However, it was noted that Google Ads do not recognise Welsh as an official language, so it can take time for advertisements to be confirmed before they appear on Google. The next step will be to ensure that the Welsh language is accepted as an official language on the platform, so that the process is more efficient.

¹³ Discussion with S4C.

It is important that the communicated messages manage to break through all the noise on social media to reach and engage with individuals. Working on attractive and catchy content that appears in several places on the web will help to do so.

Print marketing

Following on from the above point on the busy nature of social media, some groups said that receiving a printed marketing leaflet that you can hold in your hand and keep was like a breath of fresh air, and noted the power of this as a simple way of drawing attention to events. 48% of the whole online survey sample, and 42% of respondents aged 16-24 state that they hear about events via print marketing.

It is therefore interesting to note that some companies have been reducing their use of print marketing, mainly due to cost, and are allocating more resources to online work. The survey results show that print materials still have value in a marketing campaign, despite the growth of digital marketing. Environmental and financial considerations are of course involved in this decision, but a print element could be included in marketing campaigns e.g. by choosing to print seasonal / annual programmes rather than a high volume of individual leaflets every time. If individual leaflets are printed, a clear distribution strategy is needed, in collaboration with community partners, to avoid waste and to ensure that the right places are targeted.

The press / websites

As to the press and media, comments in the online survey and conversations in the focus groups highlighted the use of familiar Welsh language press and media such as Golwg magazine, Radio Cymru, Welsh programmes on S4C such as Heno and Prynawn Da, as well as the value and importance of the Papurau Bro for community marketing. Albeit small, the Welsh language press is very supportive of Welsh language arts with coverage in the press and media. We know from our discussions with them that Mentrau Iaith Cymru coordinate papurau bro across Wales, and that several are in the process of making their papur bro digital, although this is not consistent throughout Wales.

Some arts companies identified the challenges in trying to share information with audiences, including the lack of an independent arts website in Welsh to share online information. The AM¹⁴ platform was established in 2020 and is rapidly growing into a valuable space to share Welsh video content across the arts. This was discussed in the focus groups. Although it is not at present a network specifically for sharing information and marketing Welsh language arts events, there is potential to develop a similar platform in future, working in partnership with Welsh language community and arts agencies.

In our discussions with the sector, several mentioned that the English language press in Wales very rarely covers events aimed at a Welsh language audience, and the online survey responses support this finding. Only 9% had heard of events through the English language press and 7% through English language media. This raises a question firstly about the current effort by the Welsh language arts sector to engage with Welsh-speaking audiences in Wales who do not necessarily read Welsh magazines or listen to/watch Welsh programmes on the radio/television. In addition, the English language press in Wales and beyond need to cover Welsh language arts adequately and appropriately, and the Council has a role in advocating and assisting the sector with this.

Direct Targeting

46% of the total sample who responded to the online survey said they heard of arts events by direct email from the company. This can be an effective way of promoting and reaching the individual's inbox. It is therefore important that the content is relevant, subtle, and attractive in order to catch the individual's attention, as it is easy to unsubscribe. One production company commented that it saw the benefit of writing a letter to teachers rather than e-mail, and that these direct targeting usually resulted in a positive response.

S4C shared their experience that many respond well to their direct e-mail lists, as they were segmented. It is possible to identify users' interests, and target them directly by e-mail to recommend programmes that they may be interested in. If a venue is not currently targeting

¹⁴ <http://www.amam.cymru> Accessed November 2020.

directly, it should be considered in order to further develop audiences. In addition, cross-promotions can be a highly effective method of reaching a different audience and giving them access to content they would not normally discover.

Third party recommendation

52% of respondents to the online survey mentioned hearing about Welsh language arts events through word of mouth/third party recommendations. The word of mouth phenomenon has been an effective marketing method for many years, and as mentioned in the focus groups, this has now evolved naturally to hearing someone mention or recommend things online. This has been even more important during the pandemic, with all marketing methods generally having to move online during the period of writing this report.

From our discussions, it was noted that a venue in Cardiff has capitalised on the tendency of Welsh people to share recommendations with friends by inviting social media influencers to press nights. They have found that this helps them with word of mouth about Welsh language events on social media.

We have already heard about the biggest group of people who frequent the arts in Wales, according to the Audience Agency, the 'Trips and Treats'. This is what Audience Agency has to say about them:

They are receptive to advertising and direct marketing messages, but need endorsement from friends and family – as they do not have the time or perhaps the inclination to seek out new or different opportunities from the known.

It also notes that as a group of people they are not used to engaging digitally with the arts, but are however likely to be members of local WhatsApp groups. Focus groups referred to examples of friendship groups/societies that chat regularly on WhatsApp. It was said that they also use this forum in a wholly natural and informal way to let other people know about events, and that it is a way of recommending and reaching people who are not usually aware of Welsh language arts events. This, together with seeing peers discussing or 'liking' arts events on social media, was considered an effective way of drawing attention to an event.

The proactive audience

Rather than just hearing about arts events through a specific marketing method, several focus group members said that they were proactive in researching opportunities and seeking out Welsh language arts events. These individuals take responsibility by following the websites of venues/companies of interest to them, ensuring that they are on the company's email list, and they also know how to search for these opportunities to attend the arts.

The Audience Agency says about the 'Dormitory Dependables' segment:

Arts and cultural organisations' websites are widely used (especially heritage organisations), as a place to find out information about events, artists, performers and venues.

In this respect, it is important for the sector to ensure that the information available to the public is easily accessible, whilst there needs to be a way of attracting members of the public who are not as proactive in searching for information, and who do not currently engage with the arts.

Catalysts open the door to the arts

A theme that emerged strongly in all focus groups was the importance of individuals who 'open the door' to others to experience Welsh language arts culture. There was reference to examples of influential individuals or 'catalysts' (e.g. Welsh tutor, school teacher or influential friend) who let others know about Welsh language arts events. Catalysts not only recommend events, but are also proactive in offering to take a group with them to a Welsh language arts event for the first time. There were many examples of school pupils who noted that teachers drew their attention to arts events and organised opportunities for pupils to attend.

It is important to understand the key role of these catalysts in creating opportunities for others to experience the arts for the first time, and helping them to establish new habits. Welsh tutors and teachers offer a particular opportunity to act as catalysts who open the door to the arts, and every pupil and Welsh learner needs to be afforded the same opportunity to access Welsh language arts.

As to friends and peers who ‘open the door to others’, to a large extent this happens naturally and organically. Consideration needs to be given to taking this a step further and recognising its marketing value. We believe that there is an opportunity here for the sector to think creatively about ways to capitalise on an audience’s propensity to be drawn by catalysts.

Audience data

One of the challenges facing production companies is the lack of available audience data from venues. When a production company tours venues, data on the ticket-buying audience varies and is often scarce. There is no national framework for sharing audience data and this makes it difficult for the production companies to gain a full picture of the audience who come to see their work.

Several people within the sector noted that it is impossible for them to develop their marketing strategies fully without audience data.

“The lack of clear and useful data from the venues is challenging – we can’t identify who the audience are as things stand. We can only look at developing our audience if we have data. This is essential – it really is impossible to measure the audience at present¹⁵.”

Collaboration between Venues and Production Companies

Linked to the point about sharing data, creating good relationships between venues and production companies is essential for successful collaboration. Aberystwyth Arts Centre cited Theatr Genedlaethol Cymru as an example of good practice in that they visited the Centre before the performance to discuss the marketing plan and marketing resources that they could provide from the outset. Organising a meeting before the marketing started created a dialogue and mutual understanding between the venue and the production company which enabled

¹⁵ Discussion with a production company.

successful collaboration on a marketing campaign. Pontio, Bangor also praised National Dance Company Wales for ensuring that staff visited the venue in advance of the performances. It became clear in conversations with the sector that this personal contact is very important. However, such collaboration is inconsistent across the sector, and our discussions with the sector highlight ongoing communication problems between venues and production companies. As it is now possible to have virtual face to face meetings without having to travel, maintaining a constructive working relationship is easier than ever.

Most of the production companies did not think that the venues know their local Welsh-speaking audiences well enough. Their opinion was that building a constructive relationship with the Welsh-speaking audience was dependent on the goodwill of staff members rather than being embedded in the venue's strategy. They all recognised that lack of time and budget to develop a relationship with the Welsh-speaking audience was a problem for the venues.

Most of the production companies that present Welsh medium theatre felt that some venues did not appreciate the importance of getting to know Welsh-speaking audiences, and were unable to allocate resources to marketing because other more 'popular' events were prioritised. This underlines a fundamental problem; in creating strategic change to reach Welsh-speaking audiences, it is not enough to depend on goodwill or the skills of individuals. Production companies also noted the inconsistency of marketing support received from the venues. When planning a tour, a production company can often identify the locations where more marketing assistance will be needed.

“When touring a show to venues, there is a feeling that the venues don't reach the Welsh-speaking audience very well. Some are better than others. It depends on staff in the marketing department – whether or not they speak Welsh or know the area. There is a shortage of Welsh-speakers working for the venues¹⁶.”

¹⁶ Member of staff at a production company.

One production company noted that they are sensitive to the needs of their target audience because they as a company create the work and understand the marketing messages. It was questioned whether it was possible for a venue to fully understand this, seeing as they are not usually involved in the process of creating the work. It is therefore important that production companies provide the venue with as much information about the event as possible.

If the Council is to attain its target of reaching more Welsh-speakers and enabling them to enjoy the arts by 2023, it is essential that the venues and production companies work together more strategically to reach Welsh-speaking audiences.

Welsh language networks and contacts

The purpose of Mentrau Iaith Cymru is to support the network of 22 Mentrau Iaith, which involves marketing and communication, training and advocacy in the interests of the Welsh language. The principles of sharing information, experiences, ideas and resources between the Mentrau Iaith and other partners for the benefit of the Welsh language is central to their work¹⁷.

In our discussions with the sector, several people noted that they work closely with the local Menter Iaith to share promotional messages. A discussion was also had with Mentrau Iaith Cymru who emphasised that they welcome the opportunity to collaborate with the sector, highlighting the need to work directly with individual mentrau in different areas to promote to local audiences. Venue Cymru and Menter Iaith Conwy are a good example of a partnership between a venue and a Menter Iaith which is currently being developed, and hopefully will continue post Covid-19. Venue Cymru wants to develop its Welsh-speaking audience and Menter Iaith Conwy wants to see more Welsh language events in the area.

The link with organisations such as Merched y Wawr and the Young Farmers Clubs is also important to foster. Several in the sector noted that they used these links to share information about events in order to promote within these local and traditional networks. One venue mentioned that developing local networks is not always easy. As noted in our conversation with Mentrau Iaith Cymru, it is important that a relationship is created between both sides rather than

¹⁷ <http://www.mentrauiath.cymru>. Accessed November 2020.

just using them as a way of sharing information. Time needs to be given to build relationships for the benefit of the arts sector and organisations that promote the Welsh language.

A member of staff at a production company who has done a lot of work in the community said:

“We need to spend time in the communities before taking the show there, meeting people face to face – this is a great way of attracting an audience. Talking face to face makes people feel that they are important and are seen and heard, and they are more likely to remember you. This is very important.”

Staff resources and time often means that this is difficult for companies, but it is possible to share this work by working in partnership at community level. In the online survey the public expressed a strong desire to see events being marketed in collaboration with community movements, and most of the ideas suggested in the survey involved the need for companies to do more to promote and market the arts at community level.

3.3 THE WELSH LANGUAGE IN ARTS MARKETING

We have now discussed what attracts audiences and the marketing methods used to appeal to them. Given that this involves trying to reach and appeal to people who have different relationships with the Welsh language (fluent speakers, Welsh learners, people who are new to the language), the language priorities of the sector and the audience need to be taken into account when assessing Welsh language marketing.

The Welsh Government has given a strong message in its Welsh language strategy, *Cymraeg 2050*, of its ambition to have a million Welsh speakers by 2050. As well as the Council's commitment to comply with the Welsh Language Standards and the principle of treating Welsh and English on the basis that they are equal, the Council is increasingly moving towards a more collaborative relationship with the Welsh Arts Portfolio in relation to promoting the Welsh language. Specifically, the entire Portfolio is expected to adopt a proactive way of working in this area¹⁸.

We understand that the Council's *Developing Bilingualism in the Arts Toolkit*¹⁹ is in the process of being updated as a practical online resource. This will be very useful in enabling the sector to implement the Council's vision to '*encourage more people to enjoy and participate in the arts*'.²⁰

The above Toolkit already provides advice and context so that the sector can operate bilingually and undertake marketing activities more effectively in the Welsh language. We do not intend to address the themes of the above document as they are already in development. As regards the Welsh language within the scope of our assessment, we focused on the sector's views on marketing as it currently stands and on identifying the assistance that they needed, as well as seeking the public's opinion on what they consider to be important in Welsh language marketing.

The Welsh language used in marketing

¹⁸ Policy for Promoting and Facilitating the use of the Welsh Language, the Arts Council of Wales; 2019.

¹⁹ <https://arts.wales/about-us/strategy/welsh-language> Accessed November 2020.

²⁰ For the Benefit of All; Corporate Plan 2018-2023; Arts Council of Wales.

Above all, the online survey and focus groups prove that there is solid support for the Welsh language and that the public is keen to see the language used appropriately when marketing arts events.

Of the whole sample in the online survey, 73% of respondents said that it was very important that the Welsh versions of marketing materials were as good as the English (in status/value); 76% thought it very important that the language used in marketing material should be clearly written and coherent, and it was very important to 64% that the Welsh language copy felt like an original piece of writing, rather than a literal translation of the English.

This was supported in the focus groups and one of the main features identified was the importance of using coherent Welsh when marketing, so as to communicate with the audience in a language that they understand. It was also stressed that the Welsh should feel “*warm, speaking personally to you*”. Furthermore, it was suggested that the language used should not be over complicated, nor too formal. However, the audience wants it to be accurate, and that the copy should read like an original Welsh piece, rather than a slavish translation of the English copy.

There was reference in the survey to examples of poor translation in some marketing materials:

“The standard of written Welsh is often disgraceful and I often, in many different contexts, have had to turn to the English text to understand the Welsh. This is because the translator has used literal translation, showing little respect to the meaning”.

“The Welsh language versions of the text are often dreary, colourless translations of the English that lack character. Where catchy and unique phrasing is used, I’m not bothered if it doesn’t say EXACTLY the same as the English version”.

On the whole, the majority in the focus groups were satisfied with the standard of Welsh in marketing materials at present, with some individual exceptions.

The focus groups were also happy to see dialects being used when marketing, and if used appropriately, they said that this was not likely to prevent them from understanding the text in marketing material.

In discussion with young people, the same consensus was reached regarding the importance of using coherent Welsh, without being too formal. They also noted that there should not be too much of an obvious effort to write for young people, and there needed to be a balance between *“not being too posh, and not too cool”*. There was also an interesting discussion with Welsh learners who also supported the need for the Welsh to be *“correct, simple and coherent”*, which is confirmed in the online survey with 92% of learners stating that it very important/important to them that the Welsh language in marketing materials is clear and coherent.

Striking this balance in writing correct marketing copy in Welsh which appeals to the range of speakers is a skill in itself, and demands linguistic ability and an understanding of appropriate registers across various platforms. We do not recommend uniformity in the writing of Welsh marketing copy, as the language needs to be natural, reflecting different productions, genres, platforms and dialects as necessary. We trust that amending the Developing Bilingualism in the Arts Toolkit²¹, and ensuring appropriate training to embed the toolkit’s principles, will be an opportunity to advise the sector and ensure consistency when using the Welsh language for marketing.

In relation to the need to adapt the Welsh language for various platforms, writing for social media is certainly a way of modifying and loosening the language, providing an element of flexibility that can lighten the style. Cwmni’r Frân Wen, and their effective online engagement, has already been mentioned. They are an example of using informal, ‘warm’ Welsh, and the overall online content is to be commended.

However, a strong linguistic infrastructure needs to be ensured for the sector, with understanding and awareness of Welsh language issues, and language support available. The sector itself needs to take responsibility for being proactive in seeking opportunities to develop this linguistic infrastructure and developing its ability to promote and use Welsh when creating original marketing campaigns.

²¹ The Toolkit is being adapted as an online resource for the sector.

From our discussions with the sector, we feel that the Welsh language theatre sector is already aware of the importance of good quality Welsh language copy, but our research showed that there was work to be done with the dance, opera and art sectors. Welsh language copy in marketing materials in these sectors sometimes feel like direct translations of the English copy, which can make them difficult to read and understand²².

A view that emerged in some conversations with the sector was that the dance sector in particular needs to look at the way it communicates with the Welsh-speaking audience. One member of staff at a production company said that the language of dance does not work in translation from English into Welsh and that creativity is essential in expressing this art form:

“There is an upper-class English feel in the dance sector if they do not face the fact that the Welsh language needs to play a central role in their work and its promotion²³.”

This also became clear in the dance sector’s marketing materials. In some cases, the Welsh language copy was complex and difficult to understand. This copy is usually the basis for website and social media copy, so the original copy must be able to communicate appropriately with the audience in Welsh in a coherent manner. We suggest that opportunities need to be created for the whole sector to share good practice and expertise in writing for the arts.

²² Desk research, 2020.

²³ Conversations with the sector, 2020.

Staff and recruitment

“There’s a nervousness around the Welsh language - of doing something wrong. This can also create recruitment issues - we find it difficult to find staff who have good Welsh language writing skills²⁴.”

It is important that companies have Welsh-speaking staff who can communicate with audiences in their mother tongue, but our conversations with the sector highlighted a problem in recruiting staff with the requisite skills. Creating original, good quality text in Welsh means employing staff with relevant skills, ability and experience, and translating from English is a specialised skill that needs planning and funding. Lack of staff with appropriate Welsh language proficiency affects companies’ digital communications as this is content that is often created on the day and needs to be bilingual at once. It is no wonder that companies who have invested in staff with Welsh language skills see a huge benefit, according to our discussions.

Helo Blod²⁵ is an example of free support from Business Wales which is available to businesses, and the sector could make more use of it. Again, with appropriate training and raising levels of awareness of the support and training available, it is possible to form a better plan for using the Welsh language in marketing.

An arts centre in south Wales said that their Welsh-speaking audience engaged better once they had ensured that a member of staff could communicate in Welsh on the phone when people booked tickets. This means that they can record the individual’s language choice and see their booking tendencies, which in turn means that they can gather useful data on the Welsh-speaking audience.

One challenge faced by a company in Gwynedd, an area with a high number of Welsh-speakers, is to find tutors who can run dance workshops in Welsh. To address this, they applied for grant funding to organise training; they have now trained two Welsh-speakers to run dance workshops.

²⁴ Conversations with the sector, 2020.

²⁵ <https://businesswales.gov.wales/heloblod/cy/helo-blod>. Accessed November 2020.

The latest apprentice is a non Welsh-speaking dance trainer and the company is supporting the tutor to learn Welsh. In our conversations with the sector, it appeared that recruiting Welsh-speaking tutors with the appropriate skills to run workshops was a problem in other areas of Wales as well as Gwynedd.

Developing a Welsh-speaking audience

Mentrau Iaith Cymru said that the Welsh-speaking audience is *“a very loyal audience – the Welsh-speaking audience will support business, theatre etc. You can draw them back again and again if you put in the effort to attract them the first time.”*

The effort put into developing a Welsh-speaking audience could pay off for a venue or production company. We already know that the sector faces a challenge because of the lack of available data on the Welsh-speaking audience profile, and the usefulness of that data in forming a Welsh-speaking audience development strategy. There has to be an awareness and understanding of the audience to enable this relationship to develop.

The programme of events can affect the relationship with the Welsh-speaking audience – without content that attracts them you cannot develop the audience, as they will not be going there in the first place. One venue in south Wales found this challenging as not many Welsh language events are held in the area, so there was very little contact with this audience cohort.

“There are big gaps between Welsh language shows so it’s hard to say if we’re developing a Welsh language audience.”²⁶

The Welsh language experience

In our discussions with the sector, it emerged that venues that are not known as Welsh-speaking believe that Welsh-speaking audiences are prepared to travel further to have a fully Welsh-speaking experience. This is confirmed by the online survey, particularly in relation to fluent Welsh speakers. 64% of online survey respondents who are fluent in Welsh would travel further

²⁶ Conversations with the sector, 2020.

(than their usual venue) to see a Welsh-medium arts event if the centre/venue could offer them a fully Welsh language experience (e.g. Welsh-speaking staff, and the Welsh language was visual). This compares with 26% of respondents who speak a little Welsh, and 19% of Welsh learners. In addition:

- **88% of respondents who are fluent in Welsh** say that it is important or very important for them that a venue can offer a Welsh language atmosphere when they go to a Welsh language arts event (e.g. bar staff, box-office staff etc);
- **56% of respondents who speak a little Welsh** also believe it to be important/very important to offer a Welsh language atmosphere, with Welsh learners noting that introducing the Welsh language at the bar etc is to be welcomed, and helps them practise their Welsh in an informal atmosphere:

“This is particularly important for people learning Welsh – that the arts experience becomes an experience of seeing Welsh in action²⁷”.

One survey response said of the Welsh language experience:

“It gives a sense that the staff / the atmosphere is PART of the whole performance, one complete package”.

It is therefore important that venues consider how a Welsh language experience can be offered to audiences. This includes the experience of booking tickets, ordering a drink at the bar/social areas as well as the visibility of Welsh around you, and Welsh used as part of the event. Although there are examples of good practice, there is inconsistency in the sector when it comes to being able to offer the public a Welsh language experience of the arts. The Welsh language experience is not proactively offered in all areas nor at all venues. With a little strategic planning (including arranging that Welsh-speaking staff work at times when Welsh language events are provided), and appropriate training for staff, the audience’s Welsh language experience could be transformed.

²⁷ Focus Groups, 2020.

3.4 ACCESSIBILITY

‘In a fair and equal Wales we believe that the arts should be widely and easily available to everyone²⁸’.

The Council is committed to encouraging a greater number of people to enjoy and participate in the arts. If we are to improve Welsh language marketing in the sector, we need to consider the accessibility of Welsh language arts as a whole. In this section, we will consider the degree of accessibility that Welsh language arts have as regards disabilities, and will try to understand the factors that currently prevent people from frequenting Welsh language arts events.

Disabilities

We believe that the Welsh language and disabilities in the arts is a field that merits thorough research. It is not our intention to address the whole area as part of our assessment, but they need to be highlighted in this report as we discuss audience expansion and what prevents them from attending. In our discussion with Disability Arts Cymru and Hijinx theatre company, it was noted that historically people with learning difficulties or specific disabilities were brought up speaking the English language only even if everyone else in the home spoke Welsh. This had an impact on the identity of Welsh-speaking disabled people. The most frequently used sign language in Britain is British Sign Language (BSL). It has its own grammatical structure and syntax and is not closely linked to spoken English. As there is no Welsh Sign Language, this means that not every disabled person (depending on their disability) currently has full access to the Welsh language from an early age.

Hijinx focuses on creating artistic work in Wales and its core work is with artists who have learning disabilities and/or autism. Hijinx said that the lack of understanding of bilingualism in people with learning disabilities has impacted the company’s ability to create Welsh language content.

²⁸ For the benefit of all: Corporate Plan 2018-2023. Arts Council of Wales.

“Of all the families that work with us, and some of them are bilingual families, there are very few individuals who have the confidence to speak Welsh. This impacts our ability to create Welsh language productions”.

The company is very open to attracting Welsh-speaking audiences and creating opportunities for bilingual people with disabilities to be involved in their work. They are considering opportunities to work in collaboration with National Eisteddfod of Wales in order to reach an audience of Welsh-speakers and co-create opportunities for bilingual people with learning disabilities/autism to participate in the arts in Welsh. As a company that understands the importance of being truly accessible, Hijinx stressed the importance of firstly creating a meaningful Welsh language product, before developing Welsh-speaking audiences.

“We don’t want to be tokenistic. Work needs to be done to create a Welsh product first before engaging with Welsh-speaking audiences.”

There is a real need to create opportunities such as the above partnership between an arts company and a Welsh language arts institution to develop the relationship between the arts, the Welsh language and disabilities.

The actor Stephanie Ann Back has done work on the relationship between the Welsh language and British Sign Language, and projects such as her recent work, ‘I Said I Love You’ address interesting themes in this area. As Stephanie says in her blog on Unlimited:

“Extensive research into the history of Welsh language and culture and BSL/ Deaf culture revealed similar experiences for both cultures, most prevalent was the oppression of the languages by the dominant English Language. This is still the case today²⁹.”

²⁹ <https://weareunlimited.org.uk/commission/stephanie-anne-back-i-said-i-love-you-isily/> Accessed November 2020.

Enabling artists like Stephanie to develop ideas and create work is such an important part of the Council's work. It would be good to see more projects investigating similar themes in relation to the Welsh language and disabilities. This report has already underlined the importance of content to the audience, and it is crucial that content is created accessibly from the start.

The sector believes that accessibility needs to be improved in general and from the perspective of disabilities in the Welsh language arts sector. In a recent article for Unlimited, the actor Mared Jarman said:

"The Welsh language arts sector is so behind when it comes to disability. Yes, good, innovative people are being proactive, but it's not enough. We have some serious catching up to do³⁰."

Hijinx referred to the host of things that need to be considered when trying to make an arts event accessible for people with disabilities. This includes considerations such as closed captions, surtitles, BSL trailer, adapting text on paper to a video file, creating Easy Read material and providing a pre-show talk to explain what to expect in an event. Creating an accessible event means different things to different people, depending on the nature of the disability. It was suggested that the sector needed clear guidance and guidelines in relation to adding a second language to the offer when creating an accessible event, as this needs expertise and experience, as well as the need to plan accessibility into the budget from the start.

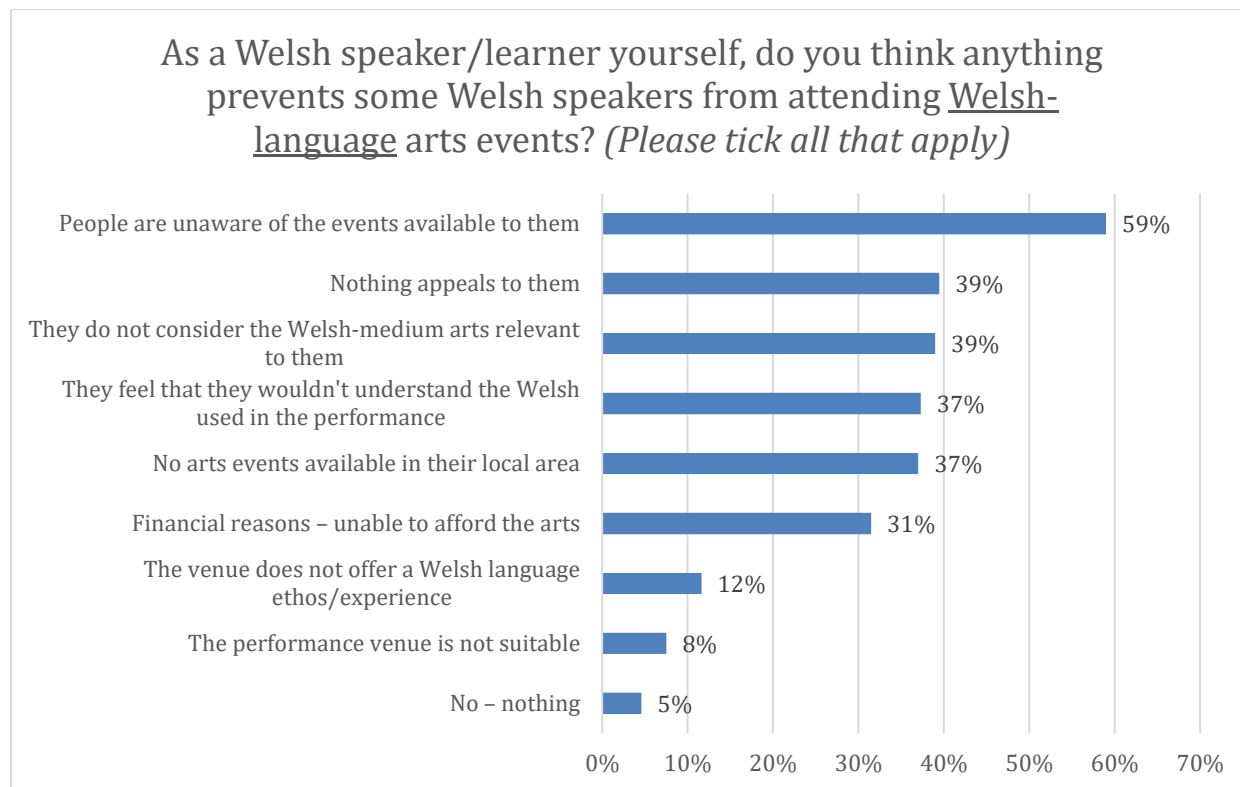
The sector agreed that budget is a problem when trying to include numerous accessibility elements. According to Disability Arts Cymru the important thing is for the company to be selective in its focus on accessibility, while also trying to ensure that everyone has access to the work.

³⁰ <https://weareunlimited.org.uk/unlimited-connects-wales-2020-into-the-future-ymlaen-ir-dyfodol/>
Accessed November 2020.

What stops the public from engaging with the arts

In the online survey the public were asked if they thought that anything prevented Welsh-speakers from going to arts events at present:

Figure 3



It was thought that the main reason that people do not attend Welsh language arts events is that they are not aware of what is available, with 59% sharing this opinion. 39% thought that people do not consider Welsh language arts to be relevant to them, with 39% thinking that there is nothing that appeals to them, and 37% that there are no arts events available to them in their local area. 37% felt that they would not understand the Welsh language in the event.

There was an opportunity to expand on the above, and other barriers stopping people from engaging with Welsh language arts, in the focus groups. The main themes that emerged were as follows:

Lack of awareness

“I wouldn’t know about things if I didn’t deliberately go to look what’s on³¹”.

In the online survey, 59% noted that the main factor stopping people from going to Welsh language arts events is that people are not aware of what is available. Lack of awareness is the main factor in the survey across all counties. 78% of Wrexham respondents and 75% of Newport respondents felt that lack of awareness was the main barrier. As one person said in a focus group;

“They wouldn’t go looking specifically for things in Welsh. So they are more likely to find out about the English things”.

This is linked to the point mentioned in Section 3.2 (Marketing Techniques), which was that a number of people proactively seek information, while others do no searching at all. The challenge for the sector is to understand how to find this audience and to ensure that the information reaches and appeals to them.

Information

Before deciding to go to Welsh language arts events, people need some information in advance. The Audience Agency says of the Dormitory Dependables:

“There is no such thing as too much information for Dormitory Dependables. They like to see all the facts and consider their options before making rational, analytical decisions. Once they have all the information, they’ll have no trouble at all making a decision.”

Marketing materials in the Welsh language arts sector on the whole tend not to provide too much information, keeping the material subtle and possibly maintaining an element of surprise. However, from this report we see that information and clarity are essential for some audience cohorts.

The importance of knowing your audience emerges once again: unless the sector can identify their needs, it is impossible to know how much information they need to make a decision. S4C is about to undertake research to improve their audience awareness and try to understand how to

³¹ Online Survey 2020.

engage and attract a cohort of Welsh-speakers who do not watch the channel at all at present. The results of this research are sure to be revealing and this affords the Council an opportunity to discuss methods of targeting and identifying Welsh-speaking audiences further with Welsh language institutions in different sectors.

Geographical factors

The availability of Welsh language arts is inconsistent across Wales. This emerged in every focus group, as a factor that stopped people from engaging with the arts. For instance, in Cardiff, the feeling was that there were opportunities galore to enjoy Welsh language arts, as could be expected in a city. It was said that it was difficult to grasp every opportunity and that Welsh language provision could feel hectic. It was suggested that better planning of Welsh language arts events should be sought, spreading them geographically in a fairer way. As you travel from Cardiff to the valleys, the provision falls off and this is a barrier for some:

“The main barrier for me is the availability of events and the awareness of events themselves. Blackwood is the nearest venue – you’d need a car³²”.

Newport had the highest percentage of respondents (67%) who believed that one of the main factors preventing people from attending Welsh events is the lack of availability in their local area.

Individuals in the north-west felt that provision in the Bangor and Caernarfon area was adequate, but that it fell off when travelling west towards the Llŷn peninsula. Similarly, the north-east focus groups were all agreed that the main factor stopping people in the area from going to Welsh language arts events was lack of availability, and having to travel further was a side effect of this:

³² Focus Group.

“Things don’t come to Mold. That’s the main barrier. In a practical sense, for people who work, it’s too much to expect someone to travel to Bangor at 5:30 in the evening. We need to persuade the companies to bring their productions to theatres in the area”³³.

This was supported by another group in the north-east:

“Sometimes, a play will tour, but companies think that nobody lives between Bangor and Newtown. There are a lot of Welsh-speakers in the north-east who are disappointed.”³⁴

It is important that production companies take account of audience opinion when arranging tours. Several elements need to be coordinated when arranging dance/theatre tours/music, including availability of locations, dates, cost and that the equipment or set fits into the venue. Securing suitable locations to stage events is essential, and the lack of venues or halls in some areas can mean that a company cannot take work to the area concerned. We suggest the need for more planning and collaboration generally across the whole sector, so that everyone has the opportunity to attend Welsh language arts events, wherever they live.

One venue in the north-east said that they can feel excluded from meetings and that they don’t have the same opportunity to network with the sector because of their location. It is important to ensure that all resources are not given to the capital; it’s possible that opportunities to network and meet online through the period of COVID-19 may change this dynamic.

As well as the fact that there is less Welsh provision in some parts of Wales, another barrier suggested by several in the focus groups was that the time that events were held did not always appeal. With a few exceptions, it was said that events and concerts tend to be held in the evening. In rural areas, it was noted that providing matinee performances could be a way of encouraging more people to attend. The individuals suggested that they would be prepared to travel a little further during the day as that wouldn’t involve travelling in rural areas at night. This corresponds

³³ Focus Group.

³⁴ Focus Group.

with the tendency of 'Dormitory Dependables' when frequenting the arts - *'Given motivations, likely to be put off if arts attending is distanced, feels risky or is hard to relax'*. It may be that the sector needs to be flexible so that they can understand what appeals to the audience.

Other people's perception of Welsh language arts

People's perception of Welsh language arts can stop them from engaging at present. According to the focus groups and online survey, this perception involves assumptions about the product itself and their perception of whether or not Welsh language arts belong to them.

"It's boring. It's not for me"...³⁵

The concept that engaging with the arts is for the middle class has been a familiar issue for the Council and sector for years, and the Council says that they *'hear challenges to middle-class dominance of arts creation, attendance and participation'³⁶*. It is important to note this perception, which corresponds with the opinion of 39% of online survey respondents who thought that people did not feel that the arts belonged to them.

"Lots of Welsh-speakers in the south east see Welsh language culture as something that they are not part of"³⁷.

"I personally feel that there is snobbery against Welsh learners and Welsh people who are new to Welsh language plays/literature which makes me feel uncomfortable in an audience."³⁸

"They need to hear the message that they are welcome. It's back to the issue of 'class' in Wales. That everyone is welcomed – this needs to be taught/absorbed from a very early age in school"³⁹.

³⁵ Focus Group.

³⁶ For the Benefit of All, Arts Council of Wales, Corporate Plan 2018 - 2023.

³⁷ Online Survey.

³⁸ Online Survey.

³⁹ Online Survey.

Although these are perceptions, they are noted by a number of people in the research, so creative ways of challenging perceptions of Welsh language arts need to be found, showing that the arts don't always have to belong to other people. And according to a group of young people:

“Perception is a problem. People worry that they won't understand. People find it intimidating. Young people need to be drawn in through gigs and comedy instead of intense plays. Also, if you can have a pint, the experience can be more relaxed”⁴⁰.

The challenge to the sector is to appeal to these individuals who have negative perceptions or assumptions about Welsh language arts, and to attract them to an event for the first time. It is important that the marketing campaign reflects the product and the experience for the individual. We want the individual to return to the arts time and again and so we suggest that the marketing campaign must be sincere. The audience will lose faith in the arts if they are misled in any way.

The arts must be marketed inclusively, making it clear that they are for everyone, whatever their social class, and however confident they are in their use of the Welsh language. COVID-19 is an opportunity for the sector to 'reopen' the arts from anew and show that they belong to everyone in Wales.

Confidence in using the Welsh language

Individuals in the research noted that some people do not engage with the arts because *“their Welsh isn't good enough”* – a familiar phenomenon in communities across Wales. The belief is that this lack of confidence stops them from going to Welsh language arts events because they are worried that they will not fully understand what is going on, and don't feel that the arts are relevant to them. This was an opinion shared by individuals who can speak Welsh fluently as well as Welsh learners and less fluent speakers.

⁴⁰ Focus Group.

To put this into its wider context, research conducted by BBC Cymru Wales, S4C and the Welsh Government in 2013 found that confidence is often the reason given by some Welsh-speakers for not using the language. According to the report, the feelings experienced by some Welsh-speakers is that they sound foolish when they speak Welsh, and feel awkward, clumsy and shy. The Welsh Government have now included a question about people's confidence in speaking Welsh in the National Survey for Wales. In the 2017-18 survey, 21% of fluent speakers said that they worried that the standard of their language would be judged when speaking Welsh. It is important that we understand that individuals' confidence in using the Welsh language and experiencing the arts in Welsh can be a barrier to them accessing the arts in the first place, and this should be taken into account when marketing to Welsh-speakers of all levels.

Accessibility for Welsh learners

According to the National Centre for Learning Welsh, 13,260 unique learners were registered on the Centre's courses during 2018-19. When we consider marketing in Welsh for fluent Welsh-speakers, we must also ensure that Welsh language arts are marketed appropriately to attract the large numbers of learners. During the research period, discussions were held with a focus group of Welsh learners across Wales, as well as with representatives from the National Centre for Learning Welsh.

To make sure that Advanced level lessons are current, the Centre issues a series of contemporary lessons for learners each year. In 2018-19, a series of lessons was held to promote National Poetry Day which included an original poem by Mererid Hopwood, and a lesson to promote the Theatr Genedlaethol production, 'Nyrsys'. These lessons are provided to advanced level learners across Wales, and are a way of bringing the language alive for them. Through raising awareness among learners, there was evidence that Welsh learners had increased the audience numbers. The Council and the sector need to realise the value of Welsh learners to the arts and support them.

The value of Welsh learners to the Welsh language arts sector has become clear in our discussions with the Centre, and creating opportunities for learners to practise their Welsh from day to day through the arts is a priority for them. The Centre commissions specific arts events for learners as well, such as 'Taith yr Iaith' which introduced the learners to Welsh history and 'Trafferth' which shared the country's legends with learners across Wales. The Centre also supports the Welsh Government's Welsh Language Music Day, and in 2019 and 2020 commissioned a radio programme presented by learners that was broadcast on the Cymru.fm website.

The learners shared some of their experiences of frequenting Welsh language arts with us, specifically their experience of going to the theatre and seeing live music. When discussing what makes the experience accessible for them, they said that studying and getting to know more about the subject was very important before deciding to attend an arts event, and the contemporary lessons are a way of providing them with this information. They also said that learners on the whole like to sit together in a block, and going with their tutor is important; part of the experience is chatting with their tutor in Welsh. They feel safer going as a group into an unfamiliar situation surrounded by the Welsh language.

It was said that pre-show talks certainly help to dispel any preconceptions that learners may have and boost their confidence, in that learners are welcomed into a new unfamiliar environment and assistance is available before the event. The Centre works closely with Theatr Genedlaethol Cymru to organise pre-show talks in some of the bigger performances that tour Wales. Other production companies have seen the benefit of pre-show talks, which are an opportunity to explain what happens in the show, introduce key vocabulary and discuss the characters before the show. There were other examples of ways to make events more accessible to Welsh learners, such as offering Sibrwd and subtitles. What emerged was that different things appeal to different learners, and a lot depends on the learner's level at the time. The main thing is that the value of Welsh learners to the Welsh language audience needs to be acknowledged, and they need to be considered and included in any work on developing audiences, and in seeking views on the arts.

Non Welsh-speaking / bilingual homes

We have already heard in Section 3.2 (Marketing Techniques) about the importance of catalysts and people who open the door to Welsh language arts culture. Further to this, some individuals in the research from non Welsh-speaking homes said that they would not go to Welsh language arts events because their parents do not speak Welsh. Here is the opinion of one young person in the south west:

“Where we live, Welsh is not the first language of many families. My family background is English; my parents don’t speak Welsh. So my parents look for English things to do. My family is not interested in Welsh stuff”⁴¹.

One theatre company that creates bilingual work for children in south Wales recognises the importance of this:

“We target schools and especially children in Welsh education who don’t have Welsh-speaking parents - we want to make the parents feel comfortable to bring their children to a Welsh language production out of school hours.”

This was reiterated by others living in bilingual homes, who would not go to a Welsh language arts event because their partner did not speak Welsh, or if their circle of friends were not interested.

“My partner does not speak Welsh, and this obviously influences what I can go and see”⁴².

It is important to think of ways to reach a wider audience to show that the arts are open to all, making mixed-language families and friendship groups feel that they all have access to Welsh language arts. We acknowledge the challenge to the sector in having to appeal to different cohorts of Welsh-speakers in an inclusive way that is open to all.

⁴¹ Focus Group.

⁴² Online Survey.

CONCLUSION

This report has addressed Welsh language marketing by engaging with the arts sector and the public, and exploring four main themes:

- What attracts an audience
- Current Marketing Techniques
- The Welsh language
- Accessibility

Within these themes, we are confident that we have addressed the main elements in developing an understanding of the way in which the arts are marketed in Welsh. The research has also alluded to other themes, which we suggest the Council consider further in the recommendations.

We wish to thank the Council for the opportunity to undertake such important work to the development of the Welsh language as a community language, and also in terms of the development and viability of the arts in Wales.

We would also like to sincerely thank the arts sector and the audience, for their time in undertaking discussions and participating in the online survey. It has been a great pleasure to undertake the work, and the willingness and enthusiasm of the sector and the audience to discuss the issues and share their ideas must be commended. There is a clear desire to improve and develop the way in which the arts are marketed in Welsh, and the sector and the audience will no doubt want to be involved in developing this for the future.

As we still face a very uncertain time in the writing of the report, we wish the Council and the sector well as they go about applying what has been found in the research. We trust that the report, and the recommendations that are to follow, will assist in the future development of the area.

RECOMMENDATIONS

We present the following recommendations for consideration by the Arts Council of Wales:

1. Undertake national research to gather the public's views of current Welsh language arts provision, and to understand the aspirations of Welsh-speakers in relation to provision that appeals to them;
2. Coordinate a process for venues to share audience data with production companies, including data on Welsh-speakers and their level of proficiency in Welsh. Ensure consistency in the data gathered across Wales;
3. Develop the Council and the sector's understanding of Welsh-speaking audiences by segmenting audiences into different groups (e.g. behaviour, language proficiency data, demographic and geographical factors) to enable more specific marketing;
4. Collaborate with national agencies to lobby Google to give the Welsh language official status so that the process of advertising through Google Ads can be more effective and efficient for marketing to Welsh-speakers;
5. Lead on strengthening the relationship between the English language press/media (in Wales and beyond) and Welsh language arts so as to reach people who do not engage with Welsh language arts and press/media at present. Create opportunities to network and raise awareness of Welsh language arts in Wales through the medium of English;
6. Commission research to improve the Council and sector's understanding of the relationship between the Welsh language and disabilities and other hard to reach communities in the arts, creating opportunities for disabled people to participate in Welsh, and to ensure that the sector can attract new Welsh-speaking audiences accessibly;

7. Develop a national online platform to coordinate and promote Welsh language arts events to the audience, or investigate the possibility of developing a similar existing platform. This should be done in collaboration with national and local partners who promote the Welsh language;
8. Continue to hold Meetings for Communicators⁴³ ensuring a focus on Welsh language marketing techniques. There should be opportunities for the sector to share regular good practice in relation to marketing to Welsh-speakers across all platforms;
9. Ensure that the revised Toolkit for Developing Bilingualism in the Arts⁴⁴ includes guidelines for marketing departments in relation to marketing to Welsh language audiences. The toolkit should include further recommendations on how to build relationships with national and community organisations that promote the Welsh language. The sector should receive appropriate training on the Toolkit's principles and their implementation;
10. Facilitate further strategic collaboration between the sector and the promotion of the Welsh language on a national and local level, by:
 - Investigating the possibility of collaborating with a national organisations that promotes the Welsh language, such as Mentrau Iaith Cymru, to appoint an officer to be responsible for developing a Welsh language network for marketing and promoting the arts in communities across Wales. This could be done initially as a pilot project, starting in the north-east;
 - Assisting the sector to strengthen its relationship with local community organisations and networks, including schools, organisations that promote the Welsh language, the Urdd, local Mentrau Iaith and Mentrau Iaith Cymru, the National Centre for Learning Welsh and local associations such as Merched y Wawr to develop a network of catalysts who create opportunities for others to

⁴³ Regular Arts Council of Wales Meetings for the arts sector's Communications staff.

⁴⁴ Arts Council of Wales – updated 2020.

enjoy Welsh language arts, and considering ways of acknowledging their value in marketing;

- A network of community venues to hold Welsh language events needs to be identified, ensuring that the sector develops local partnerships with the public from the outset when marketing;
 - Encouraging collaboration with national Welsh language institutions who also engage with audiences, but are not part of the arts sector to share expertise and good practice in attracting audiences;
 - Based on some of the findings in this report, improving awareness of the Welsh language in the entire arts sector, as well as its understanding of the needs and aspirations of Welsh-speaking audiences. The sector needs to show flexibility in responding to some of the audience's needs, such as adjusting the time that events are held, and their location;
 - Ensuring that the arts sector develops its understanding of the Welsh language skills needed by marketing staff, and that these are considered when recruiting. Establishing appropriate CPD training to develop accurate and suitable Welsh language copywriting skills across platforms;
 - Collaborating with the Welsh Government and Welsh Language Commissioner to facilitate practical assistance for the sector to develop its use of the Welsh Language, such as the Government's translation scheme, Helo Blod;
 - Creating guidelines and training for the sector on writing original Welsh marketing copy, and how to adapt this copy for different platforms. The guidelines should be based on Easy Read and Cymraeg Clir principles;
11. Recognise the value of Welsh learners to the Welsh language audience and participants, and ensure that they are considered and included in any work on developing audiences and arts provision;

12. There needs to be strategic planning between the Council, production companies, venues and Welsh language community networks to stage Welsh language arts events in a fair and balanced way across Wales so that everyone has an opportunity to participate and enjoy Welsh language arts;
13. The sector needs to convey elements of the whole experience to the public when marketing Welsh language arts events such as:
 - atmosphere of the venue
 - accessibility
 - what to expect on a practical and emotional level
 - arrangements to facilitate understanding of the Welsh language.
14. Create a specific marketing campaign post COVID-19 which 'reopens' the arts, marketing and promoting Welsh language arts as something that belongs to everyone in Wales, in an attempt to dispel the preconception that they are just for the Welsh-speaking middle class;
15. Create regular opportunities for the arts sector to network and discuss with each other so as to encourage effective collaboration between venues and production companies from the outset before marketing to audiences;
16. Provide training for tutors who speak Welsh fluently so that they have the necessary skills to become Welsh-speaking arts tutors.

ADDENDUM

- List of arts sector organisations and artists engaged as part of the research
- List of marketing materials studied as part of the desk research
- Public Online Survey Template on Survey Monkey

List of arts sector organisations and artists engaged as part of the research. The talks took place between May 2020 and October 2020, with the majority being virtual face-to-face conversations

Aberystwyth Arts Centre

Arad Goch

Arts Care Gofal Celf

Ballet Cymru

BBC National Orchestra of Wales

Blackwood Miners' Institute

Cwmni'r Frân Wen

Dawns i Bawb

Disability Arts Cymru

Elen Bowman

Galeri

Glesni Price Jones

Glynn Vivian Art Gallery

Hafren

Hijinx

Ioan Hefin

Literature Wales

Menter Iaith Conwy

Mentrau Iaith Cymru

National Youth Arts Wales

NoFit State

Opra Cymru

Pontardawe Arts Centre

Pontio

Sherman Cymru

Taliesin

Theatr Bara Caws

Theatr Clwyd

Theatr Felinfach

Theatr Genedlaethol Cymru

Theatr Iolo

Torch Theatre

Tŷ Cerdd

Wales Millennium Centre

List of marketing materials studied as part of the desk research

*Print (Leaflets, posters, programmes);
Websites;
Social media (Facebook, Twitter, Instagram).*

Aberystwyth Arts Centre

Arad Goch

Arts Care Gofal Celf

Ballet Cymru

BBC National Orchestra of Wales

Blackwod Miners' Institute

Chapter

Community Music Wales

Cwmni'r Frân Wen

Dawns i bawb

Galeri

Glynn Vivian Art Gallery

Hafren

Hijinx

Literature Wales

Music Theatre Wales

National Dance Company Wales

National Theatre Wales

National Youth Arts Wales

Oriel Myrddin Gallery

Pontio

Pontardawe Arts Centre

Sherman Cymru

Taliesin

Theatr Bara Caws

Theatr Clwyd

Theatr Genedlaethol Cymru

Theatr Iolo

Theatr Mwldan

Theatr na n'Óg

Torch Theatre

Tŷ Cerdd

Volcano

Wales Millennium Centre

Welsh National Opera