

MWLDAN

**AUDIENCE SURVEY
AROLWG CYNULLEIDFA
COVID-19
JUNE / MEHEFIN 2020**



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1 / CONTEXT

Theatr Mwldan, Cardigan, closed its doors to public and its staff on 17th March 2020, a week before the UK officially went into lockdown in response to the COVID-19 pandemic.

After a period of rescheduling events and cancelling screenings as they fell, it became clear that closure would be a matter of months, not weeks. As cinema distributors pulled releases we also started rescheduling live shows which were imminently due to take place, moving them back into the autumn and beyond into 2021. To date we have also moved approximately 100 of our external touring production dates into 2021. These dates are of course dependent on festivals being able to take place, and to other receiving venues being able to open their own doors.

This survey was conducted for a week from 1st June following just over 2 months of lockdown. Widespread reports in national media reported that commercial cinema chains were intending to open their doors as soon as possible. With our staff team on furlough and with limited reserves it has become clear that the timing of our reopening is absolutely critical to our long-term survival. Imperative to getting this decision right was the input from our board of trustees, our staff team, and - most importantly - our customers. We wanted to engage with our regular attenders and those who had an existing relationship with us to explore their feelings on returning to a shared public space following the COVID-19 pandemic. What were their concerns? Under what circumstances would they be prepared to venture out again? What measures did we need to have in place in order for people to feel safe and comfortable? We hope to use our findings to help us inform a road map to recovery which takes into consideration the thoughts and feelings of our wider community as part of that shared journey.

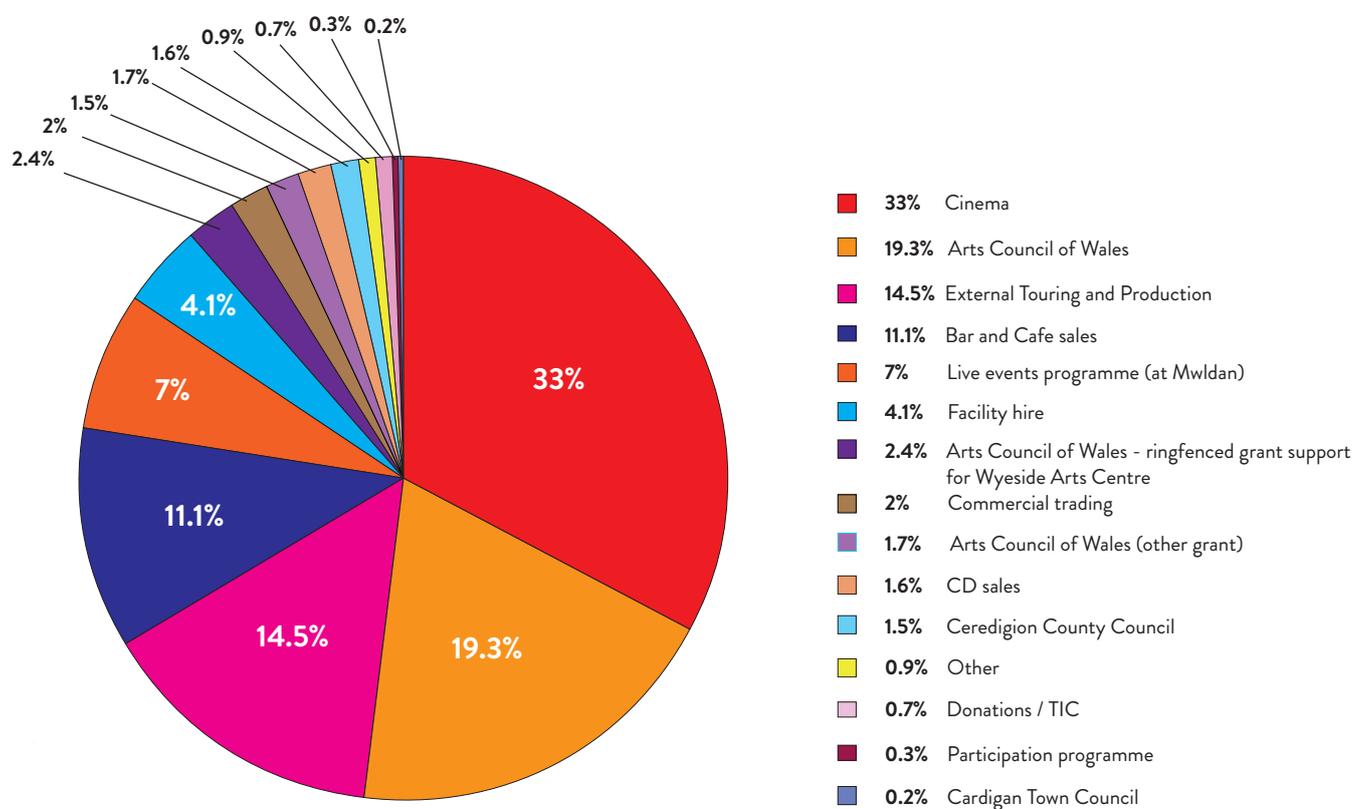
874 households took the time to complete our survey. This was a far higher level of engagement than we expected and we are extremely grateful to our respondents for their participation in what we think is an important piece of research.

About Mwldan

Established in 1983, Mwldan is an independent three-screen cinema and arts centre based in Cardigan, West Wales.

Under normal circumstances the building is open to the public 363 days a year. Typically Mwldan has up to 92,000 paid attendances per year (from a primary catchment population of roughly 45,000), and a footfall of approximately 300,000. Mwldan hosts 3000 cinema screenings, 110 live shows inhouse, and produces around 100 external touring performances a year which tour nationally and internationally. Mwldan has a record label 'bendigedig' which releases recorded music both physically and digitally.

Prior to lockdown Mwldan employed 27 staff (14 full time, 13 part time) and had an annual turnover of £1.4 million.



* Figures based on financial year 2018 -19

Mwldan receives core funding from the Arts Council of Wales as one of its Arts Portfolio Wales venues. 21.4% of our turnover comes from public funding. 78.6% of our income is earned.

We generate approximately £4.66 for every £1 we receive in funding. Mwldan is a Not-For-Profit Social Enterprise and a registered charity. All income generated by the organisation goes directly back into the business.

In its inaugural year (October 2019) Other Voices Cardigan, produced in partnership by Mwldan, Triongl and South Wind Blows, generated over a quarter of a million pounds spend within the local economy over the course of a weekend.

For the past 5 years Mwldan has produced the Cardigan Castle live music events in partnership with Cardigan Castle which also provide a boost for the local economy and help to increase the footfall and local spend in the town.

2 / METHODOLOGY

This survey was sent to 8,650 of our e-list subscribers on 1st June 2020 and ran until June 8th 2020. We wanted to engage with our regular customer base and those with whom we have an existing relationship to help us gauge their feelings on returning to a shared public space following the COVID-19 pandemic.

We asked our survey respondents for a combination of closed-ended (multiple choice options) and open-ended (free text fields). The majority of answers were given using the multiple choice options, and you will see the numerical and percentage results in the reports below. That said, we have also provided a selection of the comments given in the free text field to attempt to paint a picture of the broad attitudes and feelings held by our customers.

Where % are given they are usually as a % of the total respondents (i.e. the 874 respondents, or households they represent).

With 874 responses, just over 10% of our e-list subscribers responded to the survey.

3/ KEY FINDINGS

59.3%

Would reattend screenings or live shows at Mwldan subject to social distancing measures being in place once lockdown is significantly relaxed

Once lockdown is over

62.7%

will approach reattending with caution

64.9%

Will be keen to support local businesses when lockdown ends

92%

of responders are not currently booking for events (either at Mwldan or elsewhere)

19.9%

Would only feel happy attending outdoor events in the foreseeable future (even with social distancing in place)

65.4%

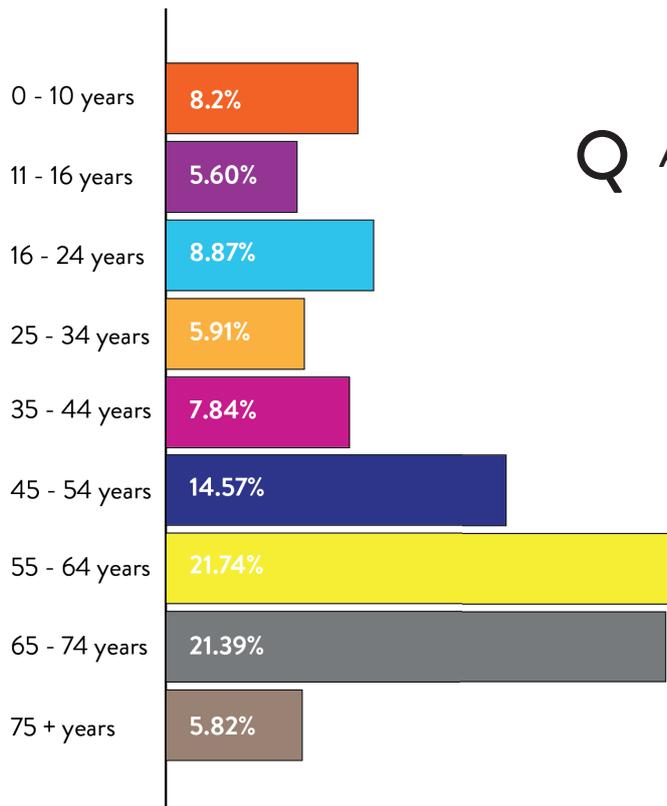
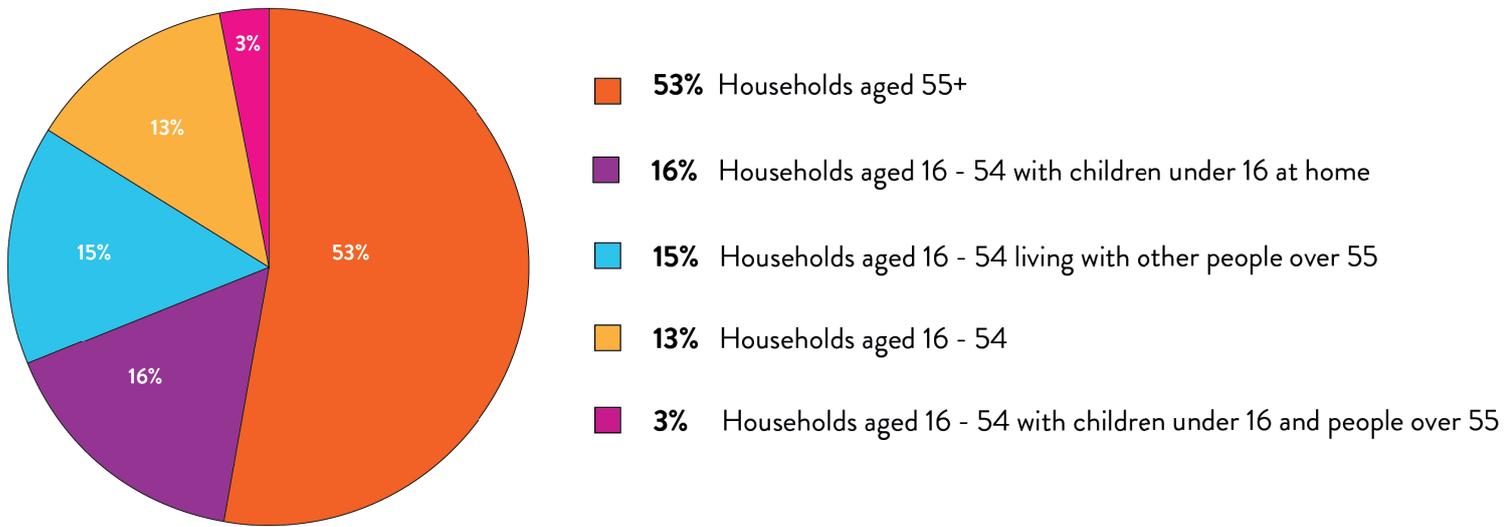
would be willing to donate a discretionary amount to a recovery fund

71%

do not envisage booking for events anywhere for at least another 4 months

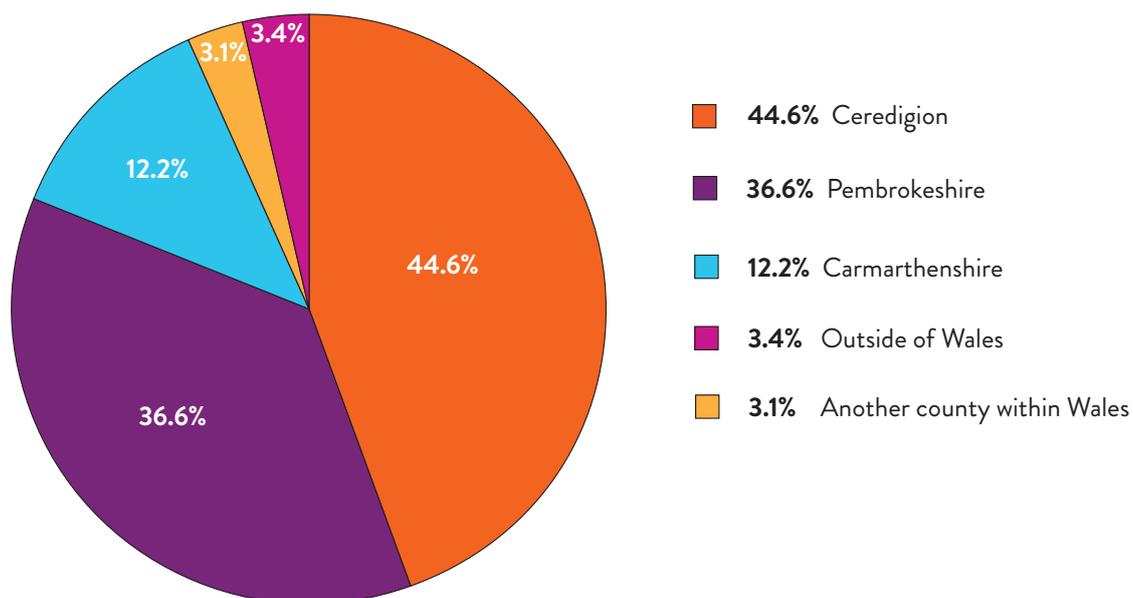
874 people completed our survey on behalf of their household.
 This represented approximately **2230** people across those households.

Q What is the makeup of your household?

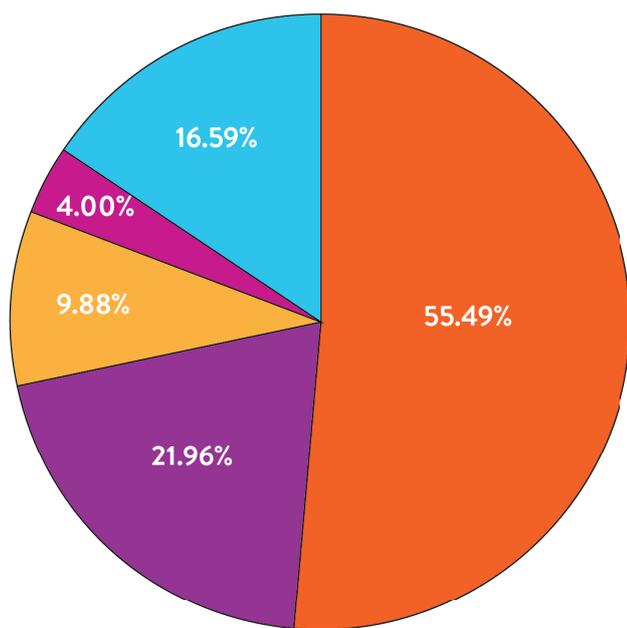


Q Age groups as a percentage of sample

Q Where is your household located?



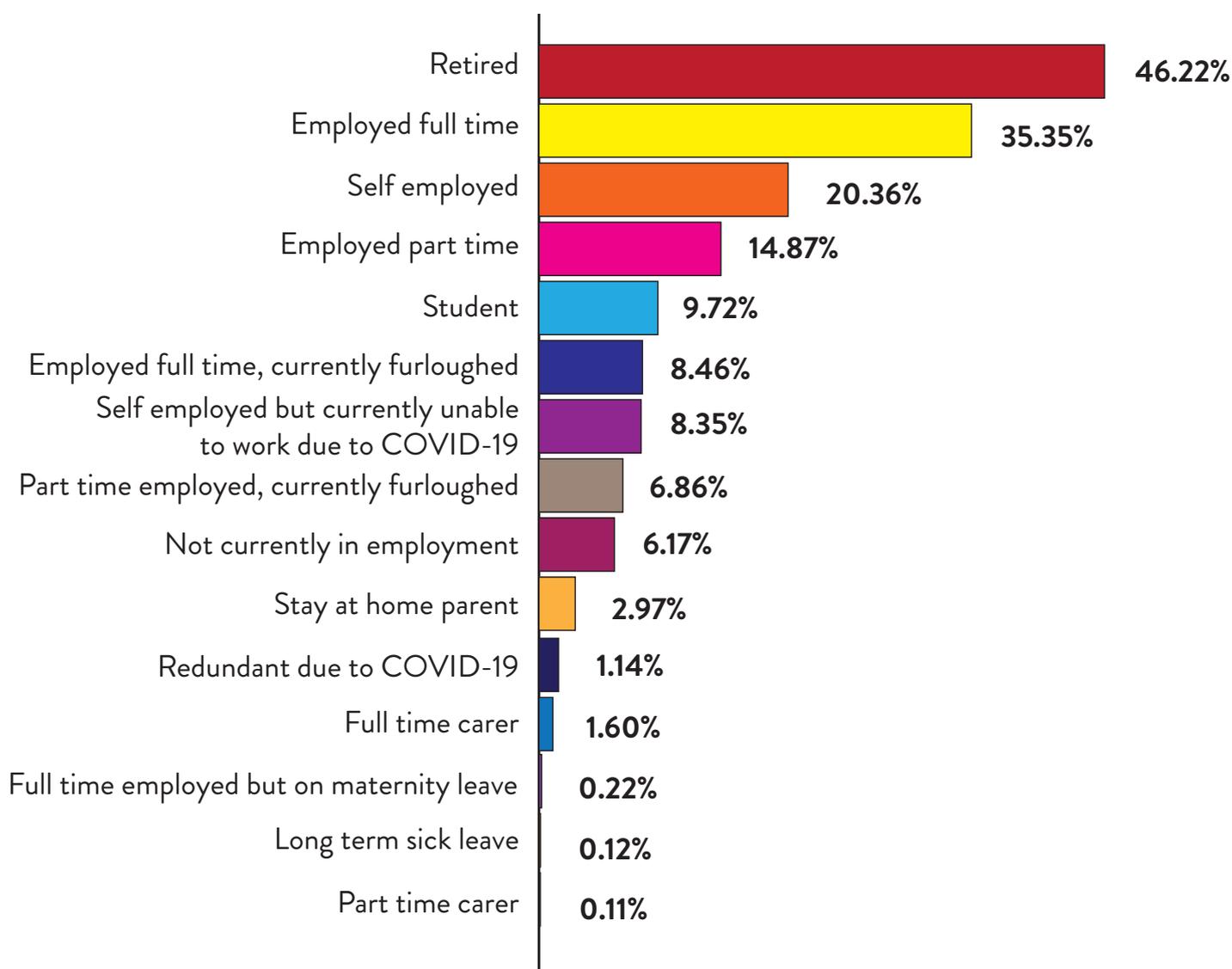
Q Is anyone in your household considered to be at higher risk from COVID-19?



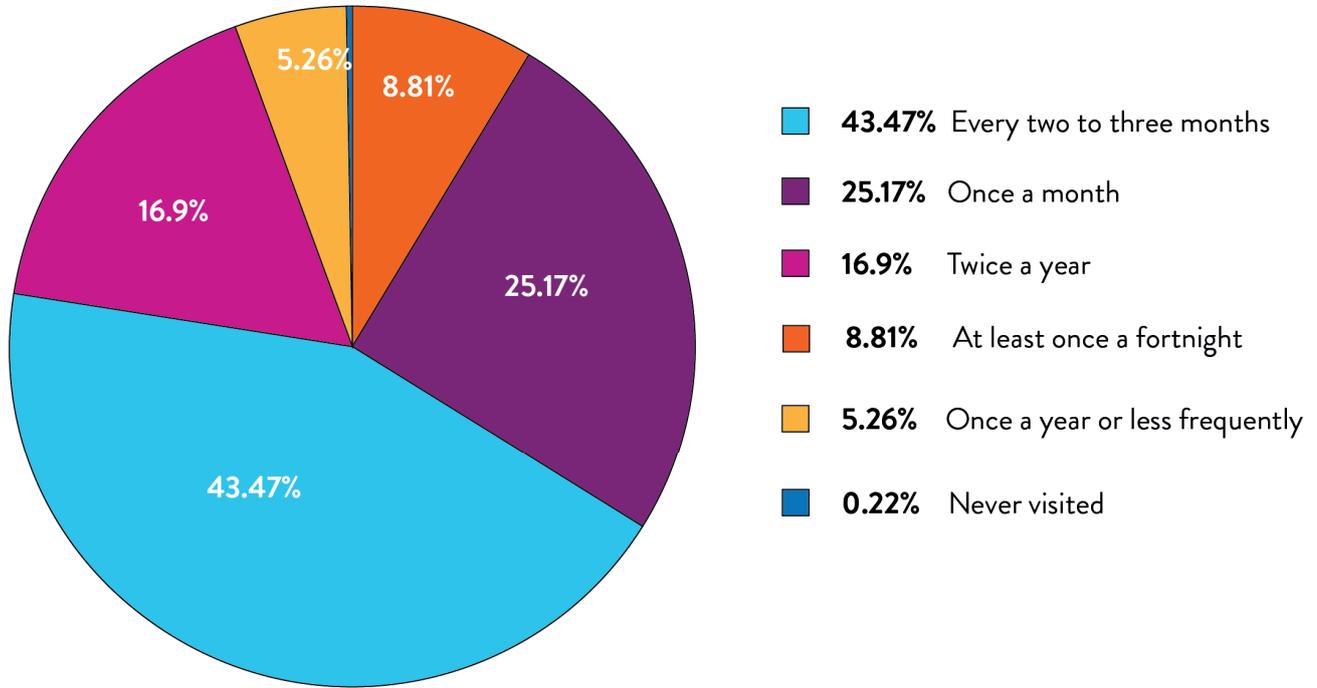
- **55.49%** not considered 'at risk'
- **21.96%** are aged 70+ 'clinically vulnerable'
- **16.59%** shielded due to chronic illness 'clinically extremely vulnerable'
- **9.88%** are key workers
- **4.00%** have an existing health condition but are not classed 'clinically vulnerable'



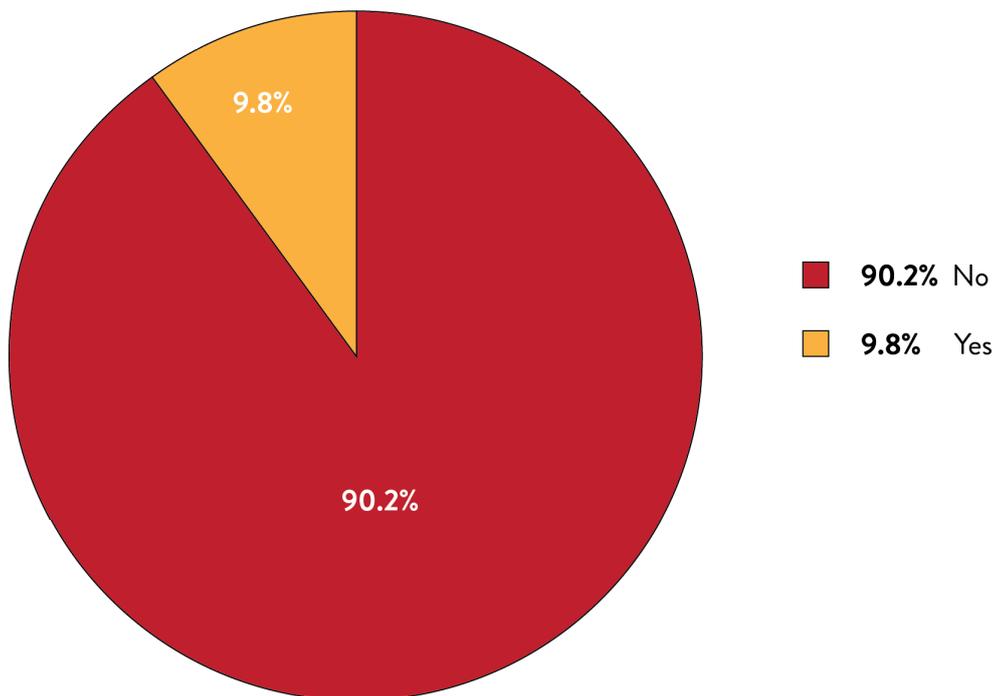
What is the employment status of people within your household?
(Percentage of households who have each category present within their household)



Q Prior to lockdown, how often did you come to see live events or screenings at Mwldan?



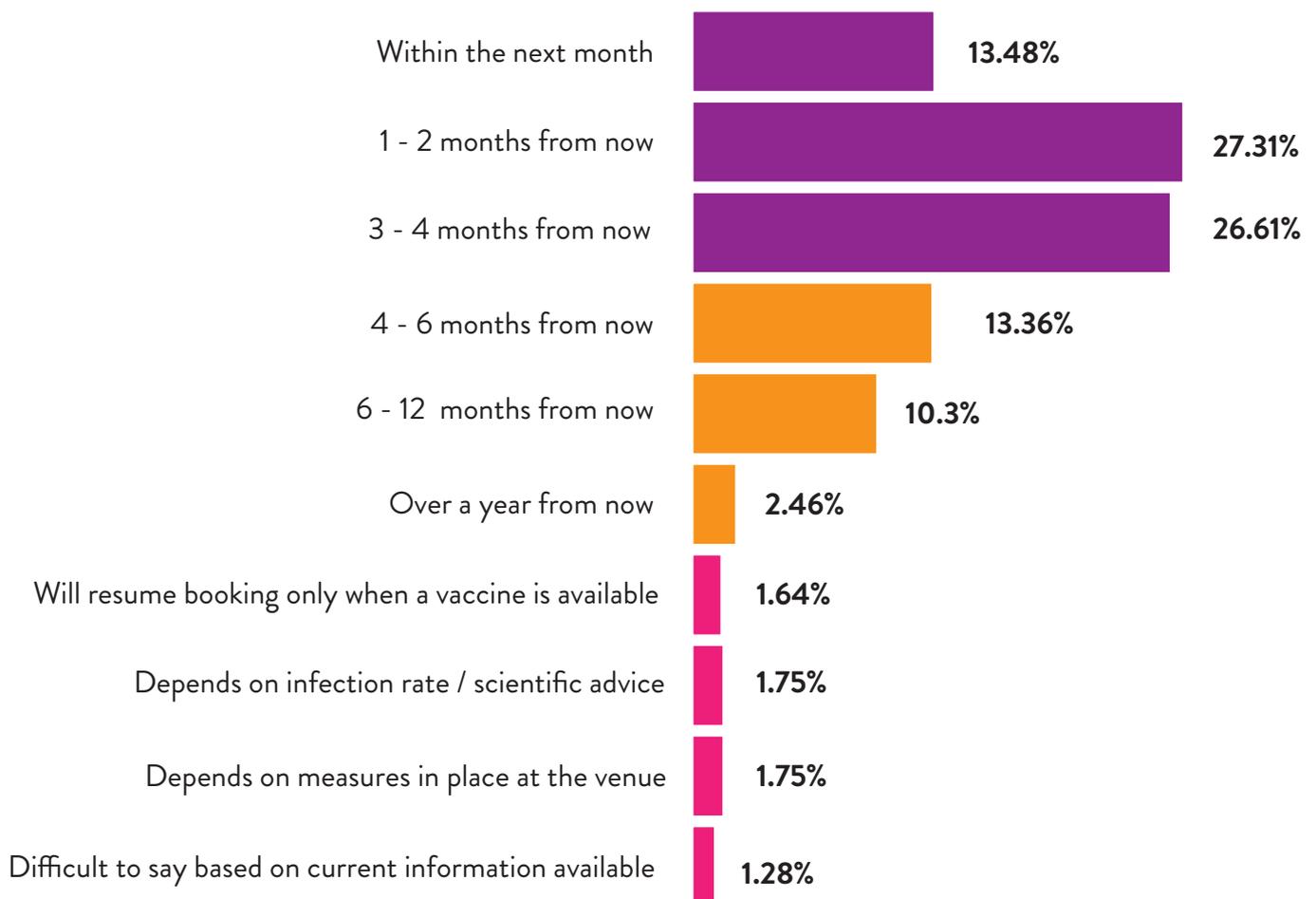
Q Are you currently booking for film screenings or live events (either at Mwldan or elsewhere)?



Q Of the 9.8% who ARE still actively booking:



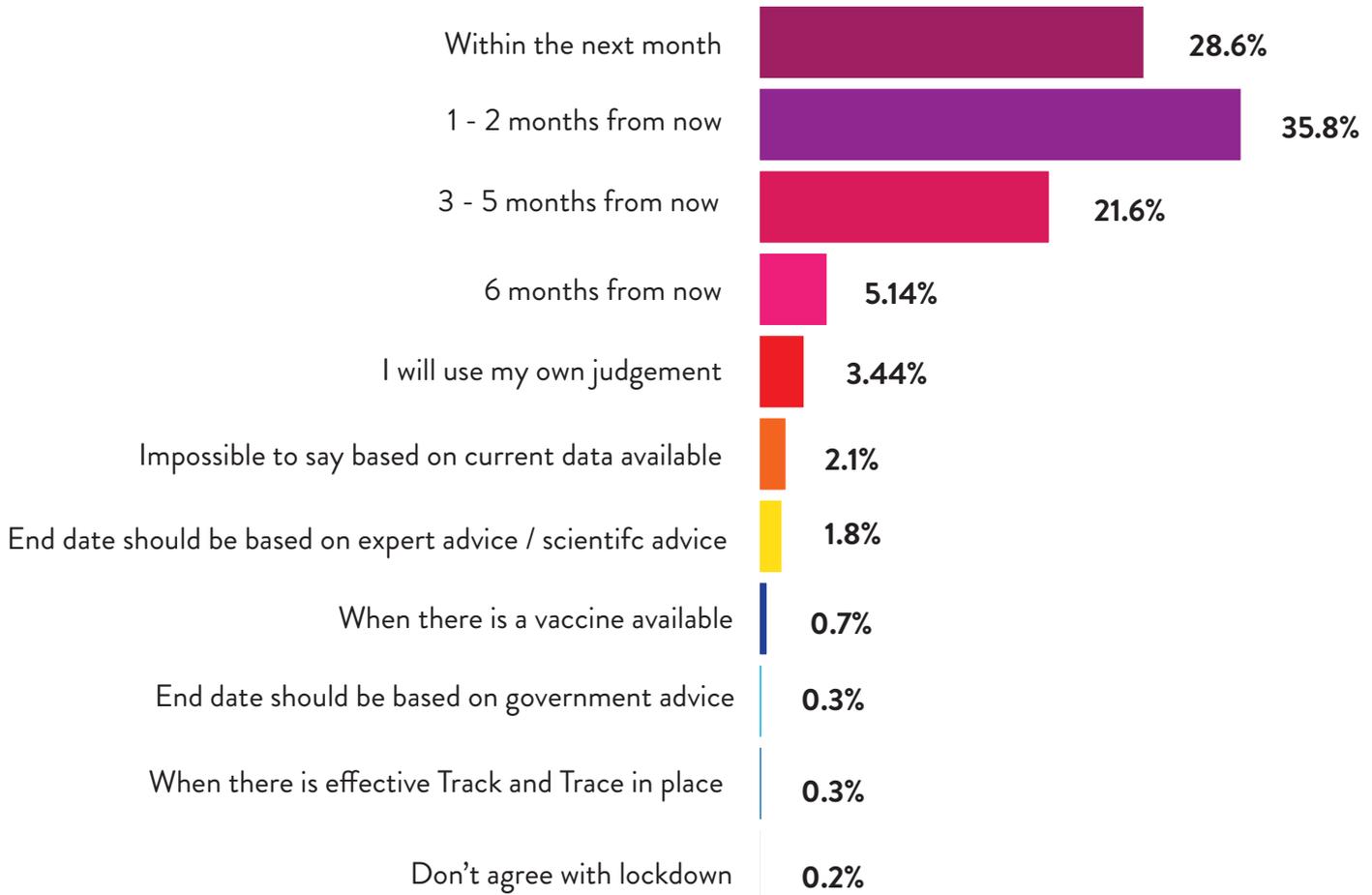
Q Of the 90.2% who are NOT currently booking, we asked when they were likely to resume:



On cross-referencing between the different household groupings, we found no significant differences in attitudes towards the speed at which people were planning on reattending, i.e. a family group with young children were no more likely to reattend sooner than, for example, a retired couple.



When do you think Wales ought to be coming out of lockdown (assuming there is no vaccine and are still active cases of COVID-19 in the UK)?:



35.8%

of respondents thought that Wales should be coming out of lockdown in the next 1 -2 months



Q Once lockdown measures in Wales have been lifted or significantly relaxed, what conditions would need to be in place for you to consider attending live performances and / or screenings at Mwldan?

8.7%

Would be happy to attend 'in the normal way' (with no special measures in place)

26.2%

Would attend providing social distancing and other safety measures were in place

26.2%

Would attend when there is Government advice suggests that it is safe to do so

51.4%

Will be ready to attend once there is a clear and sustained drop in COVID-19 infection rates in the UK

11.5%

Will only be happy to attend only when there is a COVID-19 vaccine available

4.5%

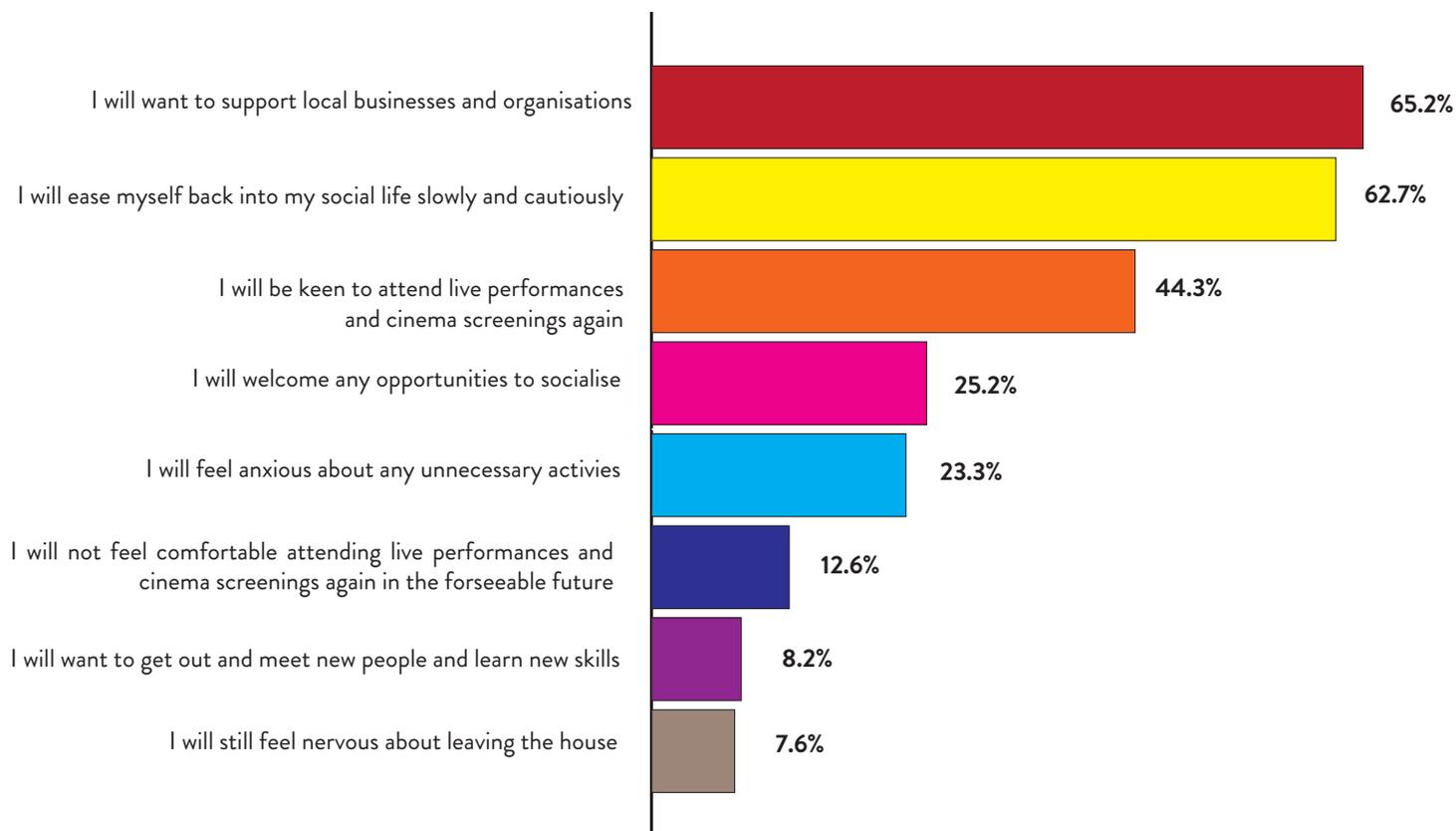
Would not wish to attend a live performance or cinema screening in the foreseeable future

"Whilst COVID-19 is still active I think it would be an unnecessary risk to attend any social activities held in what is basically a box. It only takes one careless act to start an epidemic."

"I refuse point-blank as a customer to wear mask or gloves and would not attend if anyone tried to force me to do so"

"I would be distinctly UNhappy if there are any restrictions placed. Would be significantly less likely to come than normal if "restricted" compared to normal."

Q Once the lockdown measures in Wales are lifted, which of the following do you think will best describe your mood (tick all that apply)?



"I will be making up for lost time - for all the social life I missed out on"

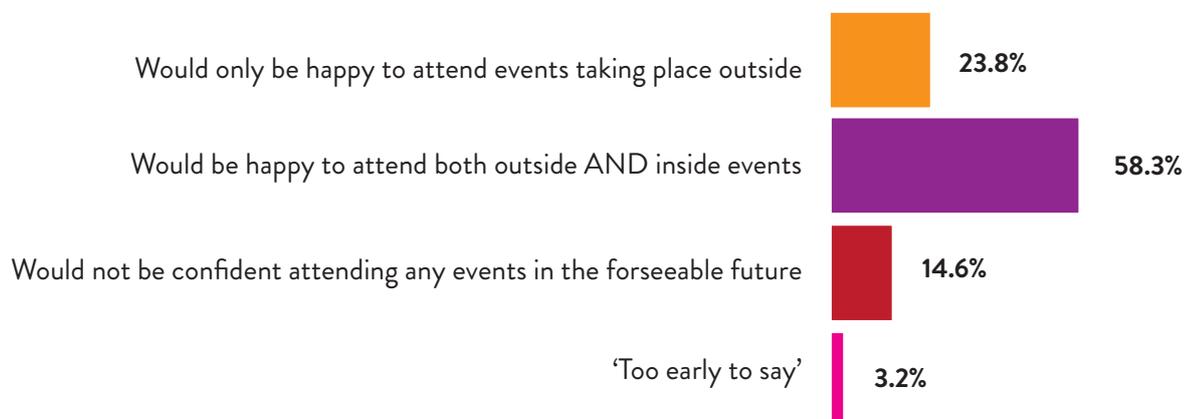
"I'm missing live music and theatre so much!"

"Basically we'd love to be back with distancing, etc as required by regulation driven by scientific advice. And the sooner we can all crowd in as we did the better!!"

"Once there is next to no chance of catching COVID-19 we will cautiously re-engage with social activities"

"Depends on whether a vaccine is licenced otherwise why risk your health just to be entertained for an evening?"

Q Assuming the lockdown in Wales is lifted or significantly relaxed, at that point how likely will you be to attend live performance and / or cinema screenings where social distancing can be observed and hygiene measures maintained?



Q Of those who expressed an opinion on limiting capacity at events:



79.5% felt that limiting numbers would help maintain safe social distancing

"Social distancing and hygiene are vital but also ventilation, which is rarely spoken about. If you could create a well-ventilated venue, I would be more inclined to attend an event. So, currently, outdoor events would be of preference to me."

"let's get going and get back to what the new normal will be, this is not going away anytime soon so we have to get on with life, it's just another disease!"



What would help you to feel safe and comfortable going to a live performance or cinema screening at Mwldan again? (Tick all that apply)

70.6%

Limits on the number of audience members who can attend

69.6%

Clear procedures for entering and leaving the auditoriums

67.7%

Occupied seats spaced at least 2m apart

62.2%

Avoiding queues of people

55.3%

Floor markings indicating safe distances and signage

54.5%

Availability of hand sanitiser

52.3%

Evidence of an active, visible cleaning schedule being in place

43%

Self-scanning ticket system on entry

42.6%

Contactless card payments only

35.9%

Online or phone booking only

31.8%

Staff wearing masks and gloves

29.6%

On-site health monitoring (e.g. taking temperature)

24.4%

Customer wearing masks/gloves

15.1%

Self-service food and drink

13.6%

Protective screens in auditoriums

11.2%

Seeing others visit

68.9% would appreciate the reassurance of receiving a full refund if the event was cancelled or if they could not attend themselves due to illness.

Q If necessary, what would be the most appropriate fundraising options for us to consider?

- 28.3%** would not object to an increase in ticket prices
- 65.4%** would be willing to contribute an optional donation to a recovery fund
- 34.8 %** would be open to paying an additional ‘recovery fee’ contribution per ticket
- 32.4%** would be open to paying an additional ‘recovery fee’ contribution per booking

Other suggestions include: a paid membership option, fundraising concerts (once possible), crowdfunding, ‘Drive-Through’ cinema screenings, non-booking related options to donate, ‘sponsor a seat’ campaign, paid ‘Mwldan Broadcasts’ through our website.

“I want to be able to continue to enjoy Theatr Mwldan but as a ‘Shielder’ I would need to be completely sure about my safety. If this meant I could not attend for some while I would like to make a small but regular contribution to the recovery fund as TM is the jewel in Cardigan’s crown.”

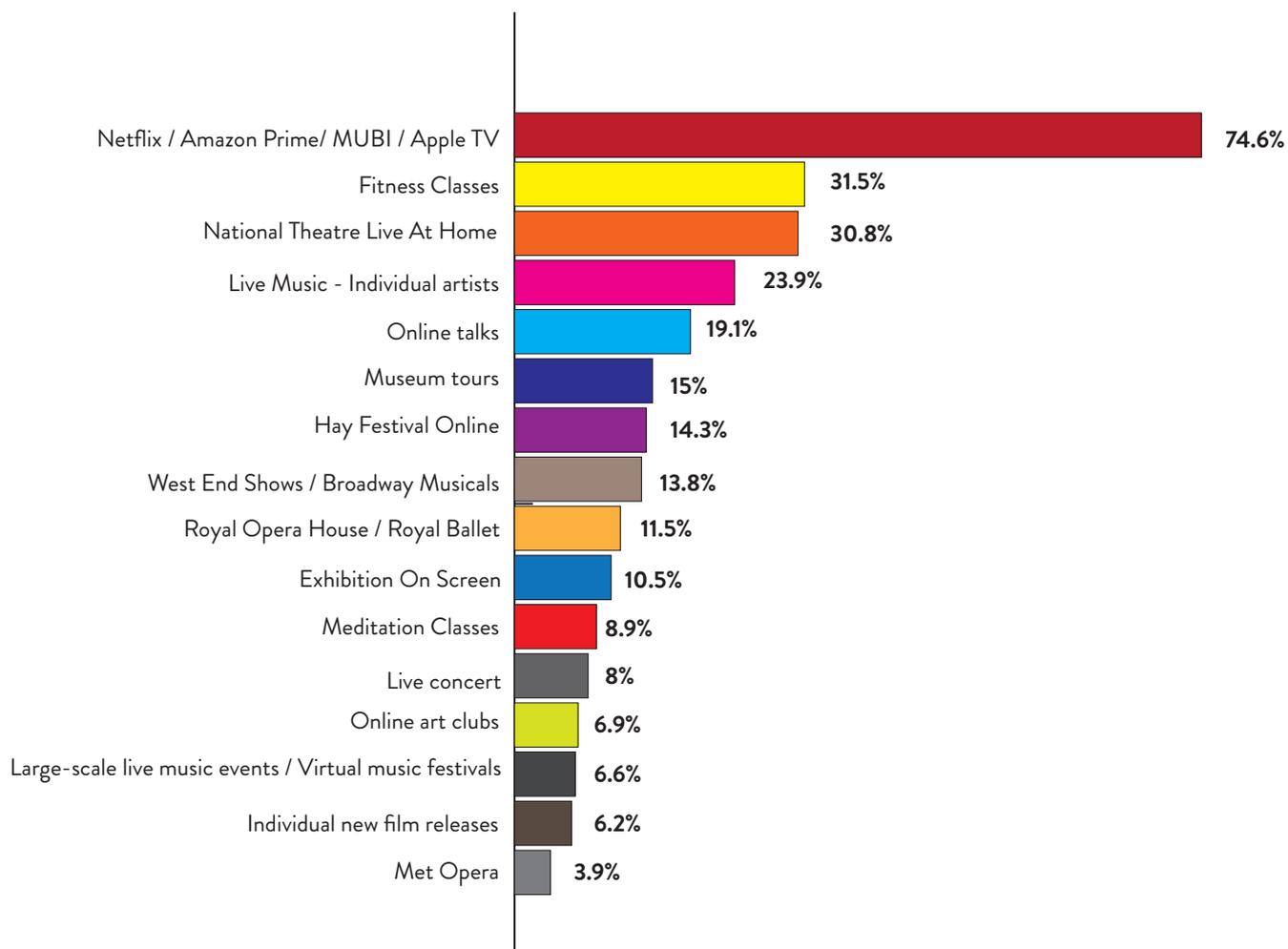
“Additional ticketing and surcharge will lessen the wide access that arts in Wales has created.”

“delicate balance as many are on low incomes or will be less able to pay more after lockdownpeople like me who are semi-retired and can afford to pay more should be asked to pay more!”

“No point increasing price tickets if people who normally attend will have lost jobs or have less disposable income due to everything going up and maybe having a drop in their wages.”



During lockdown have you been engaging with any the following online offerings?
(Tick all that apply)



"I am very sorry to see my own responses about how I feel and sometimes wonder if I will ever feel comfortable again in a cinema or at a concert. We have been great supporters of yours for many years and do hope you can survive."

"The Mwldan is a vital part of Cardigan life and we should all do our best to ensure its future"

"Just want to wish you well and thank you for considering our feelings in this crazy time. Mandatory face coverings and social distancing are, in my view, essential for any gatherings of people, particularly in confined spaces indoors."

"I really appreciate your efforts to make sure we are safe, I understand that you will be facing financial difficulties but please remember that we are also struggling because of loss of work so please don't make us pay extra. Please give the option to donate to those who feel able to but don't put pressure on those of us who are struggling financially but would like to start living our lives again. Stay safe and thank you for all your work!"

"Get your doors open again. If people feel vulnerable, they can make the choice to stay away."

"I've had COVID-19 - so from an individual point of view am less anxious for myself, but would welcome care being taken to minimise spread in our community."

"If I arrived at the cinema and there were lots of people wearing face masks/ visors with yellow distancing tape everywhere I'd get very anxious, wouldn't relax and enjoy my visit and wouldn't attend again until it was safer to do so."

"As a rural area we have been fortunate with fairly low infection rates. But as a tourist destination there is a possibility that once people travel to this area then the infection rates may increase"

"I am very much looking forward to coming back to the excellent performances held at the wonderful Theatr Mwldan and Small World Theatre. We are very fortunate indeed in Cardigan to have such awesome venues"

"Theatr Mwldan is a very valuable asset to our community and I would hope that you will be able to continue and recover from this and I feel that the community would be prepared to do as much as we can to support you and tolerate any changes made in order to continue functioning and remaining profitable."

"We must all expect our entertainment to cost more in the future."

"We would all be very happy when you can open again as the theatre is a most important part of social and cultural life in this area. I'm sure everyone is most conscious of the difficulties you face and I'm sure the public have faith in your ability to cope with the problems ahead."

"I think I would prefer a staggered return rather than an immediate resumption to what it was like before the virus"