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A Snapshot of Democracy and Society in Wales

Initial findings from the Welsh
Election Study 2026

April 2026

Anwen Elias, Mohsin Hussain, Bettina
Petersohn & Matt Wall



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The Welsh Election Study 2026 is co-ordinated by researchers from Swansea and Aberystwyth Universities, and is funded by the Economic and Social Research Council.

The research is delivered in partnership with the Wales Institute for Social and Economic Research and Data, and Focus Games, and in collaboration with Ipsos UK.

For more information about this report, or the Welsh Election Study 2026, please contact **Anwen Elias** (awe@aber.ac.uk).

A Snapshot of Democracy and Society in Wales

Initial findings from the Welsh Election Study 2026

1. Overview

Ahead of the election to Senedd Cymru on 7 May 2026, this briefing paper presents initial findings from the pre-election wave of the Welsh Election Study 2026. The findings are based on a representative probability sample of 10,001 adults aged 16+ in Wales who were surveyed between 26 February and 7 April 2026.¹

We present data on three aspects of democracy and society in Wales, as the country prepares to elect representatives to the seventh Senedd:

Attitudes towards Welsh democracy

- Most people are satisfied with how democracy works in Wales (43%), although there is a clear minority who are not (32.7%) and a fifth of respondents didn't know how to answer this question.
- People are, however, generally distrustful of local, Welsh and (especially) UK government. Most people don't feel that they can influence decisions affecting their local area, Wales or the UK.
- People nevertheless feel that elections matter and that it makes a difference who wins them; this sentiment is especially pronounced in relation to elections

¹ The survey was conducted by Ipsos UK, in collaboration with Swansea University and Aberystwyth University, using two approaches: Ipsos' in-house random probability Knowledge Panel and an ad hoc push-to-web random probability survey. For both approaches, respondents were recruited via random probability sampling by sending letters to randomly selected addresses, inviting residents to take part. This means every household in Wales had a known, non-zero chance of selection. Knowledge Panel members who were digitally excluded were provided with a tablet and free, restricted data connection, and telephone interviews were arranged for invitees to the ad hoc survey who could not go online. Data have been weighted to the adult population profile of Wales.

to the UK Parliament. Three-fifths of respondents (58.9%) felt that it matters which political party is in government in Wales.

- When asked to describe how they feel about the upcoming Senedd election, respondents overwhelmingly expressed negative sentiments including disappointment, frustration and worry. Whilst some are hopeful, they are in the minority.

Political interest and understanding

- The data indicate a Welsh electorate that is generally interested in politics (including the upcoming Senedd election) but with mixed understandings of how democracy works in Wales.
- Knowledge is high about which level of government (Welsh vs. UK) is responsible for policy areas such as defence, and language and culture; however, only half of respondents correctly assigned responsibility for the NHS to the Welsh Government.
- We find a clear age gap in knowledge about the powers of the Senedd, with younger respondents consistently performing worse than older people. Only 28% of respondents aged 16-25 knew that the Welsh Government is responsible for the NHS in Wales (compared to 62.7% of those aged 65+).
- Knowledge about the Senedd electoral reforms is low. Two-thirds of respondents were unable to answer questions correctly about the increased size of the Senedd, the new constituencies, and how the electoral system works.

What life is like for the people of Wales

- An innovation of the WES 2026 is a set of questions about the places where people live, and perceptions of wellbeing and community cohesion.
- The data points to a general sense of economic decline within households, local areas, and in Wales.
- At the same time, respondents are generally satisfied with their lives and the local area they live in. People living in Ceredigion, Gwynedd and Pembrokeshire are most satisfied with their local areas, while satisfaction is lowest for people in some of the local authorities in South-East Wales – especially Blaenau Gwent, Merthyr Tydfil and Newport.
- The majority of people feel a clear sense of pride in the places where they live. Over half of respondents report that, in their local areas, people from different

backgrounds get on well, and that people treat each other with respect. These findings point to a generally strong sense of living in cohesive communities.

The remainder of this report sets out these key findings in detail.²

2. Attitudes towards Welsh democracy

Public attitudes towards democracy matter. Dissatisfaction with democracy is an indicator that democratic institutions are failing to meet citizens' expectations.³ Similarly, declining levels of political trust may lead to voter disengagement and increased polarisation; it can also undermine the ability of governments to make policies that deliver better policy outcomes.⁴

We asked people what they think about democracy in Wales, the extent to which they trust different levels of government, and how they feel about the upcoming Senedd election. Overall, our data indicates that satisfaction with Welsh democracy outweighs dissatisfaction (Figure 1): 43% of survey respondents are broadly satisfied with how our democracy works. There is nevertheless a significant minority who are less content: 32.7% of respondents report being fairly or very dissatisfied with how democracy works in Wales. 20.4% of respondents also reported not knowing how to respond to this question.

Asked about how much they trust different levels of government, our data reveals a predominance of distrust across local, Welsh and UK scales (Table 1). Respondents are least trusting of the UK Government (67.9% reporting limited or no trust), followed by Local Government and the Welsh Government (48.8% and 48% with limited or no trust respectively).

² For the figures presented in the report, data tables are provided in the Annex.

³ Centre for the Future of Democracy (2020) *Global Satisfaction with Democracy*. Cambridge University.

⁴ OECD (2024) *OECD Survey on Drivers of Trust in Public Institutions – 2024 Results*, OECD. Quilter-Pinner, H., Statham, R., Jennings, W. and Valgardsson, V. (2021) *Trust Issues. Dealing With Distrust in Politics*, Institute for Public Policy Research.

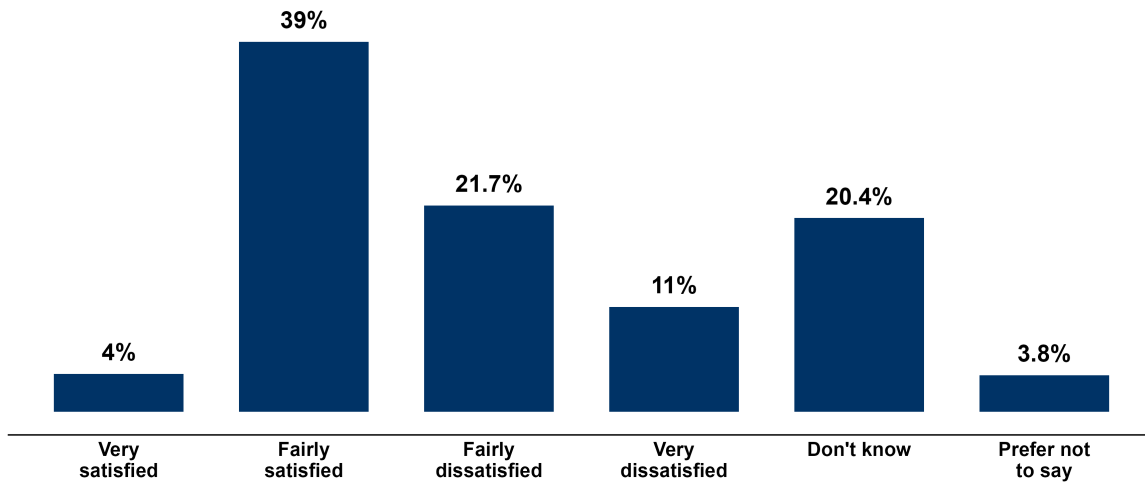


Figure 1 – How satisfied or dissatisfied are you with the way democracy works in Wales?

Table 1 - How much trust do you have in: i) the Welsh Government, ii) your Local Government, and iii) the UK Government?

Institution	Trust a great deal	Trust to some extent	Don't trust it that much	Don't trust it at all	Don't know	Prefer not to say
Welsh Government	4.1%	36.3%	28.6%	19.4%	8.6%	3.0%
Local Government	3.5%	34.8%	29.2%	19.6%	9.9%	3.0%
UK Government	2.1%	21.0%	29.3%	38.6%	6.4%	2.7%

A similarly negative sentiment emerges when people are asked whether they feel they can influence decisions affecting their local area, Wales, and the UK as a whole (Table 2). Most people don't feel they have influence at any of these levels of government. This sentiment is strongest in relation to decisions affecting the UK (60.1% tended to, or strongly, disagreed that they had influence), followed by decisions for Wales and local areas (52% and 40.9% respectively).

Table 2 - Perceptions of influence over decisions affecting i) UK as a whole, ii) Wales, and iii) my local area

Level of Influence	Strongly agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Strongly disagree	Don't know	Prefer not to say
Wales	2.8%	15.9%	17.3%	27.6%	24.4%	9.2%	2.9%
My local area	4.0%	23.3%	20.0%	22.0%	18.9%	8.8%	2.9%
UK as a whole	1.8%	10.0%	16.3%	30.9%	29.2%	9.0%	2.9%

At the same time, however, people still believe that elections – and who wins them – matter (Table 3). In this respect, respondents are most emphatic in relation to elections to the UK Parliament: 67.1% think that it makes quite a lot, or a great deal, of difference who wins a general election. Whilst a similar sentiment is expressed in relation to the Senedd, it is not as strong (53.8%). In relation to Local Council elections, 42.1% of our respondents think that who wins makes a difference, compared to 31.9% that feel this makes little or no difference. Further analysis is required to understand what drives these variations in perceptions across different levels of government.

Table 3 - How much of a difference do you think it makes who wins elections to i) the Senedd, ii) the UK Parliament, and iii) Local Councils?

Election Level	A great deal of difference	Quite a lot	Not very much	No difference at all	Don't know	Prefer not to say
Senedd / Welsh Parliament	25.1%	28.7%	22.6%	10.5%	9.9%	3.2%
UK Parliament	43.7%	23.4%	13.4%	9.2%	7.0%	3.2%
Local Councils	16.8%	25.3%	31.9%	13.3%	9.3%	3.3%

The sense that elections matter is also confirmed by responses to a question specifically about whether or not it matters which political party is in government in Wales (Figure 2). A majority – 59.8% of respondents - disagreed with the statement that who wins makes no difference, compared to 19.3% who agreed. It is worth noting, however, that 16.8% of respondents did not express an opinion in either of these directions. This finding suggests that voters understand that their vote in Senedd elections has consequences for how Wales is governed, and that different political parties offer alternative agendas for running the country.

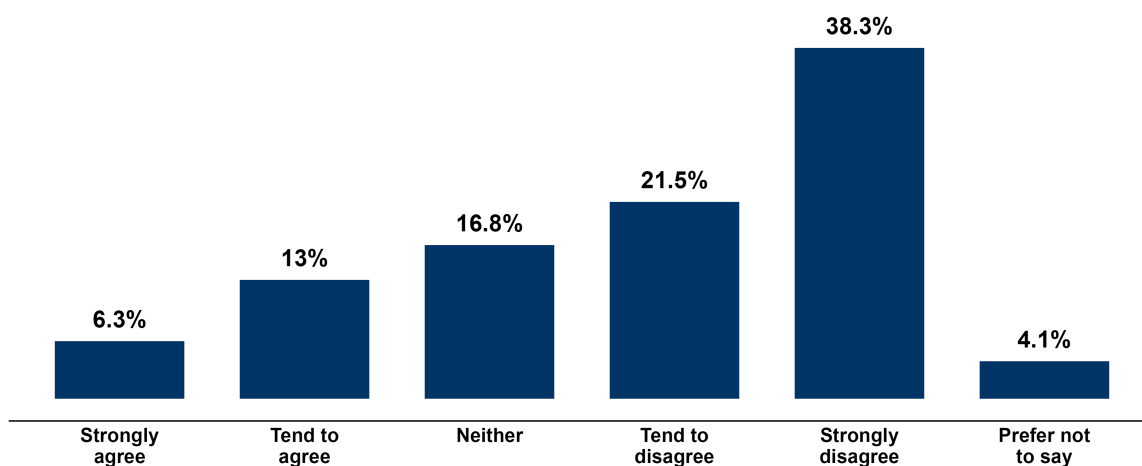


Figure 2 - It doesn't matter which political party is in government in Wales

Finally, we asked respondents to tell us, in one word, how they felt about the upcoming Senedd election; the frequency and emotional weight of participants' responses are visualised in the word cloud in Figure 3.⁵ The result is striking: respondents expressed emotions that are overwhelmingly negative (83%) compared to positive (17%). Whilst there is, for some, a sense of hope going into this election, much more salient are feelings of disappointment, frustration and worry. This suggests that the Welsh electorate is approaching the ballot box with a sense of significant apprehension rather than optimism.

⁵ To ensure that only the most prominent and recurring emotions are captured, the visualisation includes only words with more than three mentions. The emotional content was quantified using the National Research Council Canada Sentiment Lexicon, validated library that maps open-ended text to specific emotional categories. To word count contains a minimum of 60 words for ease of interpretation.



Figure 3 - When you think about the upcoming Welsh Parliament/Senedd election, what is the main emotion that you feel?

In summary, attitudes in Wales show support for core elements of democracy, such as whether elections matter and whether it makes a difference who governs. There is also, however, a mixed picture of attitudes towards the different elements of democratic institutions, such as governments, elections, and perceived influence over decisions.

3. Political interest and understanding

A recent report on strengthening democracy in Wales makes the case that in order for people to take part in democracy, they first need to understand how it works.⁶ In this section, we explore the Welsh public’s general interest in democratic politics at different levels of government, and their understanding of the role of the Senedd. The 2026 Senedd election also sees significant changes to the way in which we elect Members of the Senedd,⁷ and we explore the extent to which people are aware of these reforms.

⁶ Innovating Democracy Advisory Group (2026) *Towards a Thriving Welsh Democracy: Progress Report*. Welsh Government.

⁷ Senedd Cymru (2026) *Senedd Election and Member Changes*. Senedd Cymru.

Our data shows that, overall, a majority of respondents are very or fairly interested in politics across all political arenas (that is: in the wider world, at Westminster and in the Senedd, and local council politics) (Table 4). Of strongest interest is politics in the wider world, with 64.9% of respondents being very or fairly interested. In contrast, interest in politics in the Senedd is slightly lower (50.2%), although a slightly higher number - 59% - say they're interested in the upcoming Senedd election.

Table 4 - How interested are you in the following: i) politics at the Senedd, ii) the upcoming Senedd election, iii) local council politics, iv) politics at Westminster, and v) politics in the wider world?

Political Arena	Very interested	Fairly interested	Not very interested	Not at all interested	Prefer not to say
Politics at the Senedd	12.5%	38.7%	29.7%	16.5%	2.6%
Upcoming Senedd Election	25.3%	33.7%	24.6%	14.1%	2.3%
Local Council Politics	20.1%	40.8%	24.1%	12.6%	2.4%
Politics at Westminster	22.2%	40.2%	21.1%	14.2%	2.3%
Politics in the Wider World	24.8%	40.1%	20.8%	12.1%	2.2%

At the same time, however, just over a third of respondents (35.1%) feel that they know a fair amount, or a great deal, about how Wales is run (Figure 4). A larger share of respondents (43%) feel they know 'just a little' about how Wales is run, with just under a fifth (18%) reporting that they know nothing at all.

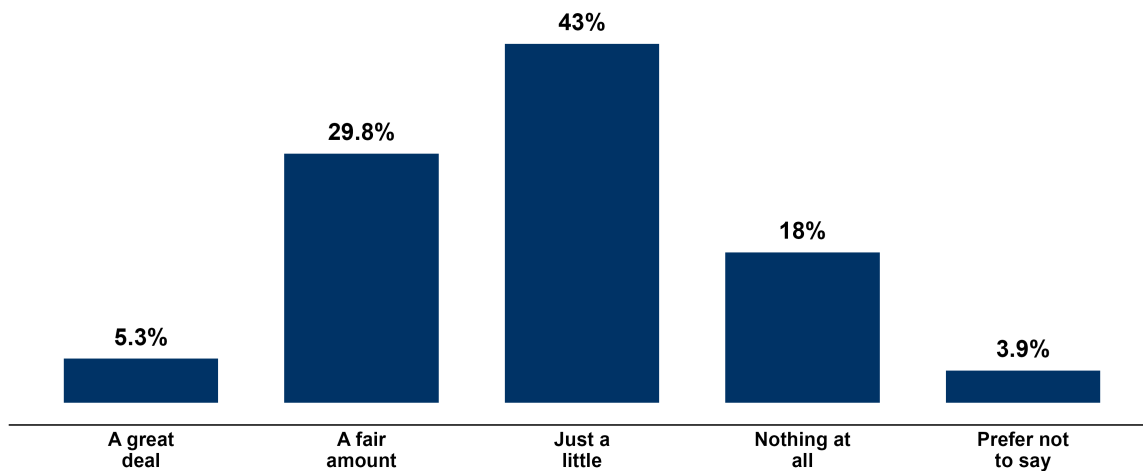


Figure 4 - How much do you feel you know about how Wales is run?

We also explored respondents' understanding of the role of the Senedd. We asked people to tell us who they thought was responsible for a range of policy areas: the Welsh or UK Government. The results confirm that, after 27 years of devolution, there remain significant knowledge gaps about the responsibilities of the Senedd (Figure 5).

Across 11 political knowledge questions, the highest levels of understanding about the powers of the Welsh Government were in relation to language and culture, roads, and housing. Half of respondents correctly identified the Welsh Government as also having responsibility for the National Health Service (49.6%), whilst a majority incorrectly attributed the responsibility for agriculture, and business and economic development, to the UK government.

Over two thirds of respondents correctly identified the UK Government as being responsible for defence and foreign affairs, the court and criminal justice systems, welfare, and broadcasting and media. However, almost three-fifths of the respondents incorrectly identified policing as being the responsibility of the Welsh, rather than UK, Government.

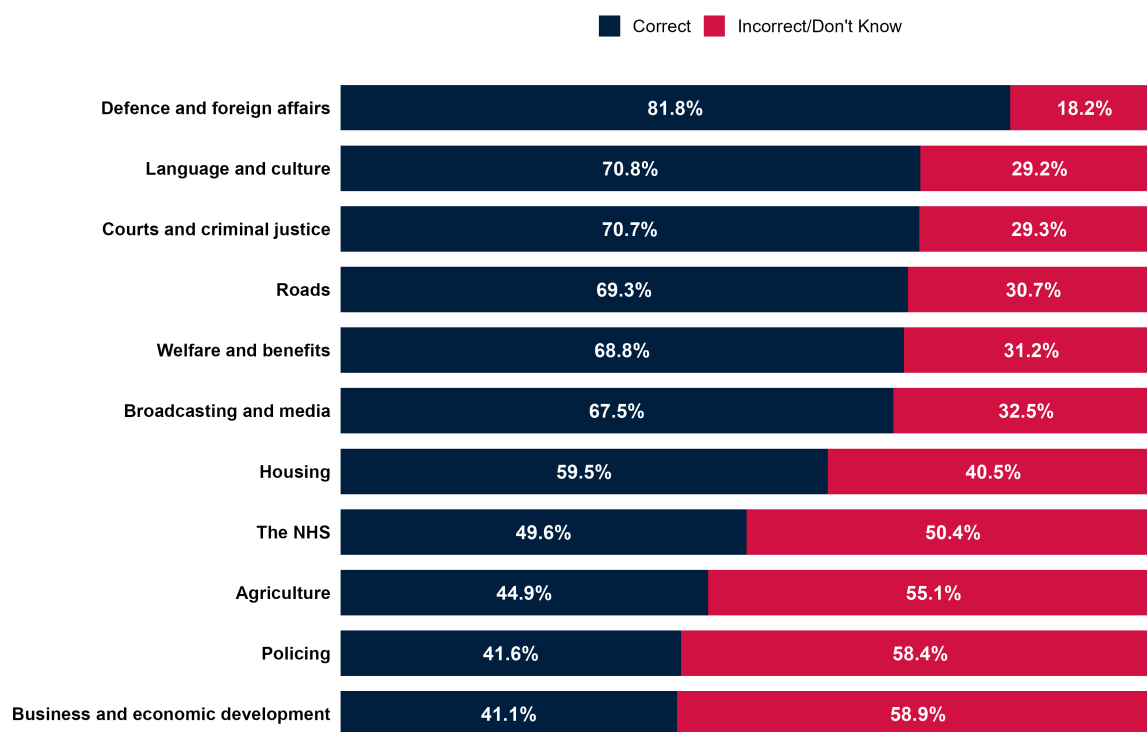


Figure 5 - Knowledge of the policy responsibilities of the Welsh Government vs UK Government

Note: The percentage of respondents who correctly identified the level of government responsible for each policy area, sorted from highest to lowest accuracy.

Our data suggests that this knowledge gap varies across different age groups. In general, older respondents are better than younger people at attributing policy areas to the correct level of government; this is a consistent trend across the policy areas. For example, only 28% of respondents aged 16-24 correctly responded that the NHS falls into the responsibility of the Welsh Government (compared to 62.7% of over 65s) (Figure 6). We see a similar gap, if slightly less pronounced (around 20%), in the ability of younger vs. older respondents to correctly assign governmental responsibility for the courts and criminal justice, defence and foreign affairs, housing, roads, and welfare and benefits. We provide the full data on all age ranges and policy areas in the Annex.

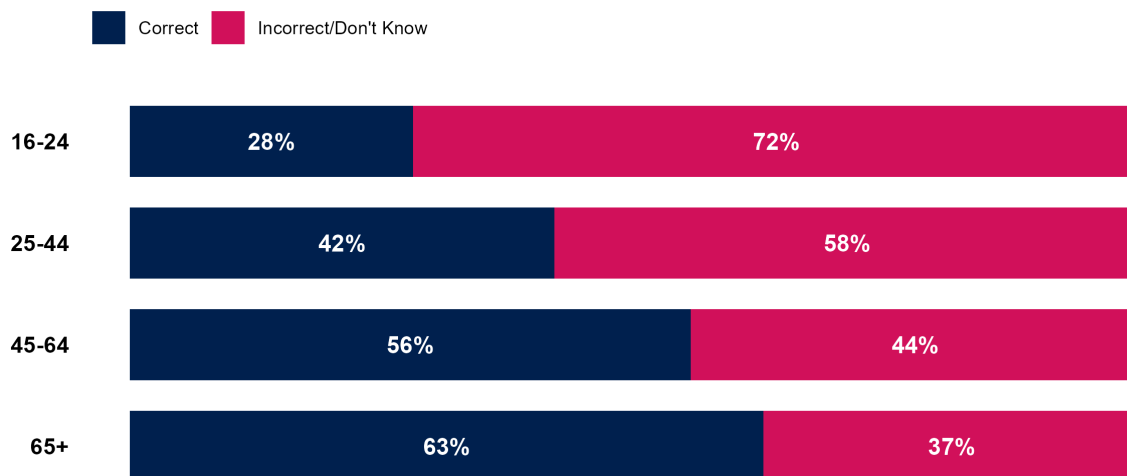


Figure 6 - Knowledge of responsibility for the NHS, Welsh Government vs UK Government, shown by age of respondent

Note: The percentage of respondents who correctly identified the level of government responsible for each policy area, sorted from highest to lowest accuracy.

Finally, we asked respondents about their knowledge of some of the electoral changes that have already been implemented in Wales (lowering the voting age from 18 to 16 in 2020) and that will be in place for the next Senedd election (increase in number of Senedd members from 60 to 96, 16 new electoral constituencies, and a proportional electoral system to elect 6 representatives per constituency).

To do this, we asked a series of multiple-choice questions about voting age and the characteristics of the new electoral system; respondents were asked to choose what they thought was the correct answer (Table 6). The majority of respondents (61.5%) correctly identified the voting age in Wales to be 16. Knowledge of the electoral reforms that are coming into place for the Senedd election on 7 May, however, was generally very low: a clear majority of voters replied ‘don’t know’ or ‘prefer not to say’ to these questions.

Within this low knowledge base, there is slightly more awareness of the number of Senedd members that will be elected (29.9%), and that under the new electoral system each voter will be able to cast only one vote (24.1%). There is relatively less knowledge of the number of MSs representing each constituency (14.9%), and even less of the operation of the closed list system of proportional representation (11.6%). It should be noted, however, that this data was collected between 26 February and 7 April 2026. It provides a baseline for future waves of the WES 2026 to evaluate whether levels of knowledge of the new electoral system increase during the election campaign.

Table 6 - Knowledge of electoral system for upcoming Senedd election

Knowledge area	Correct	Incorrect	Don't know / Prefer not to say
Voting Age (16)	61.5%	22.6%	15.9%
Number of Votes (One vote)	24.1%	15.1%	60.8%
MSs per Constituency (6)	14.9%	15.6%	69.4%
Total MSs (96)	29.9%	8.3%	61.8%
How Closed Lists Work (False)	11.6%	16.1%	72.3%

Overall, these findings suggest a Welsh electorate that is generally interested in politics, including the upcoming Senedd election. However, understanding of how democracy works in Wales is mixed, whilst knowledge of the electoral reforms in place for the next election is limited.

4. What life is like for people in Wales

A key innovation of the WES 2026 is a set of questions that explore how people feel about their lives in general, and the places where they live. These questions allow us to explore dimensions of wellbeing and community (or social) cohesion in Wales, that is, the “extent to which people in a community treat each other with respect, get along and participate to ensure everyone can access their human rights and fulfil their potential”.⁸ We present a selection of the data here; in future analyses, we will use these (and additional questions) to explore how perceptions of wellbeing and community cohesion link to broader attitudes towards Welsh democracy and shape political preferences.

When asked to rate how satisfied they feel with their life (Figure 7), respondents on average reported being generally satisfied (mean score of 6.57/10). We also asked

⁸ Welsh Government (2026) *Community Cohesion Principles for Practitioners*. Cardiff: Welsh Government.

respondents how satisfied they felt with their local area⁹ as a place to live; the average level of satisfaction with each local authority area is shown in Figure 8 below. People in Ceredigion, Gwynedd and Pembrokeshire are most satisfied in this respect, with people in several of the local authorities in South-East Wales – especially Blaenau Gwent, Merthyr Tydfil and Newport – being less satisfied.

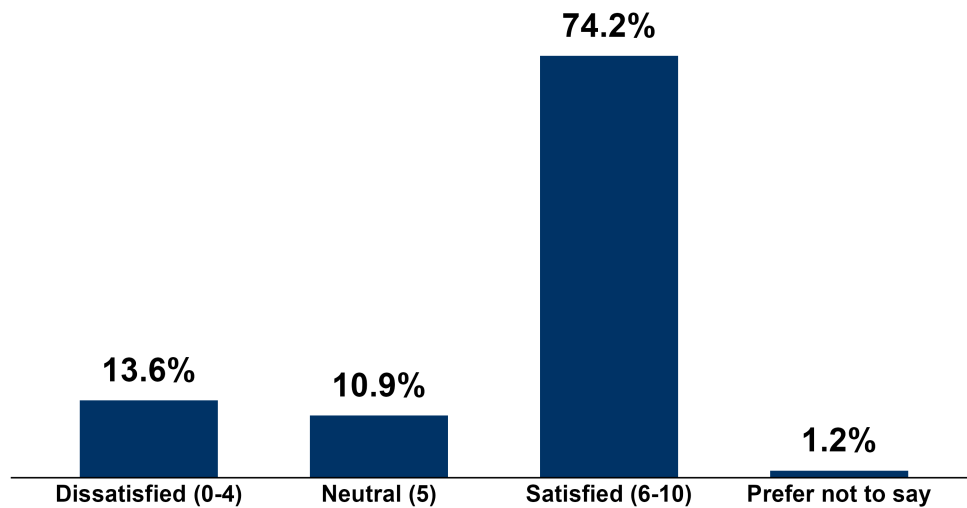


Figure 7 - How satisfied are you with your life nowadays?

We further asked respondents how they feel about the places where they live, and the people who live there (Figure 9). The results overall point to a generally positive attitude towards respondents' local areas: the majority agree that people pull together to improve the local area (37.9%), that people from different backgrounds get on well together (53.8%), and that people treat each other with respect and consideration (59.6%). This positive sentiment is also reflected in the sense of pride that most people feel towards their local area, with 59.2% of respondents agreeing with the statement.

⁹ Local area is defined as 'an area within 15 to 20 minutes' walking distance from your home'.

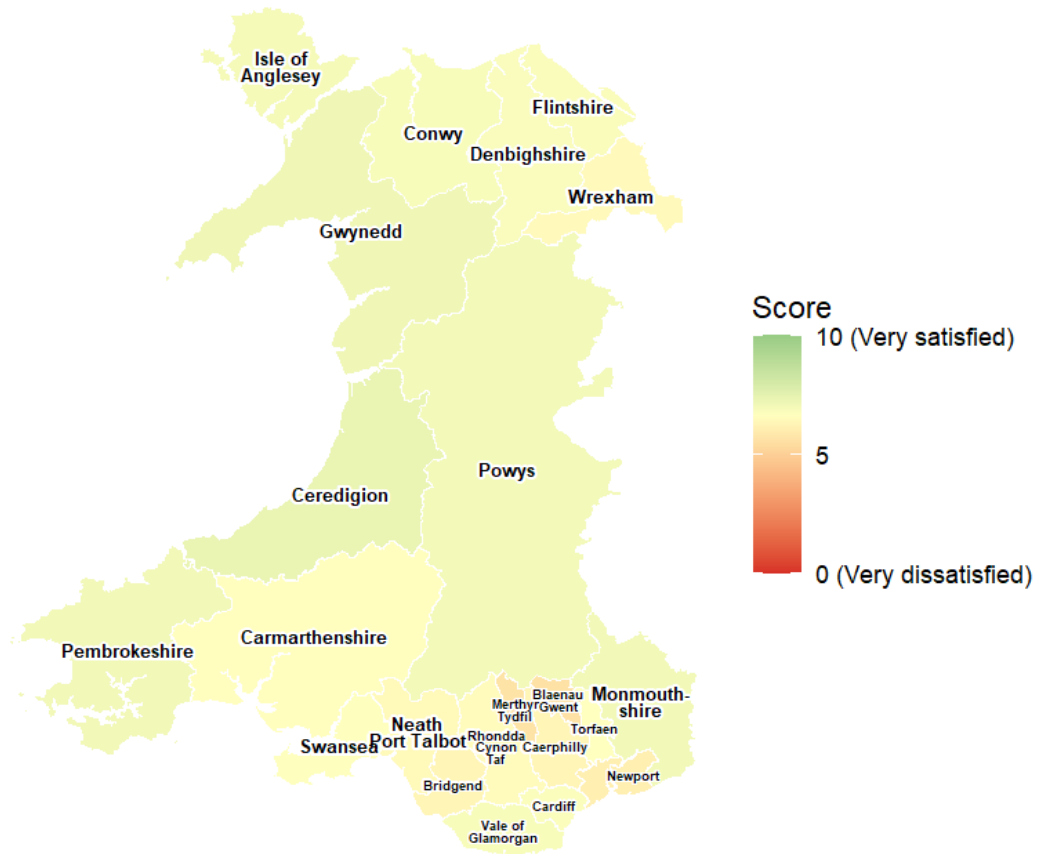


Figure 8 - How satisfied are you with your local area as a place to live?¹⁰

Finally, we asked people about how the economic situation in their local area and Wales has changed over the last 12 months (Table 8). A clear majority feel that things have gotten worse (58.9% and 63.9% respectively), with less than 5% of respondents perceiving that the local and Welsh economic situation has improved. When we consider the geographical distribution of this sentiment of economic decline in the localities where people live, it is most keenly felt in the areas of North (with the exception of Anglesey) and West Wales, as well as the South Wales valleys (Figure 10).

A similarly negative sentiment emerges when people are asked about the economic situation in their household since the last Senedd election in 2021. Whilst 27.0% report no change, for the majority (54.8%) their experience has also been one of decline.

¹⁰ The yellow and light orange areas scoring below the regional average of 6.66, though they remain above the theoretical midpoint of 5 (Neutral).

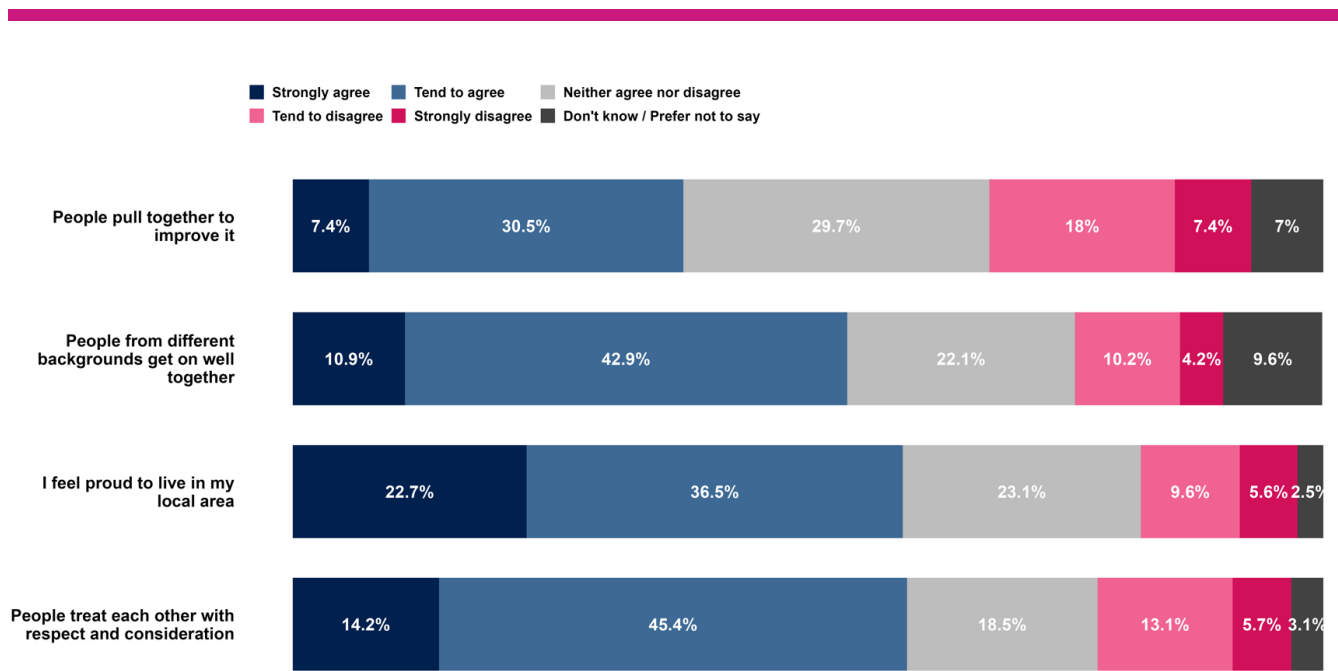
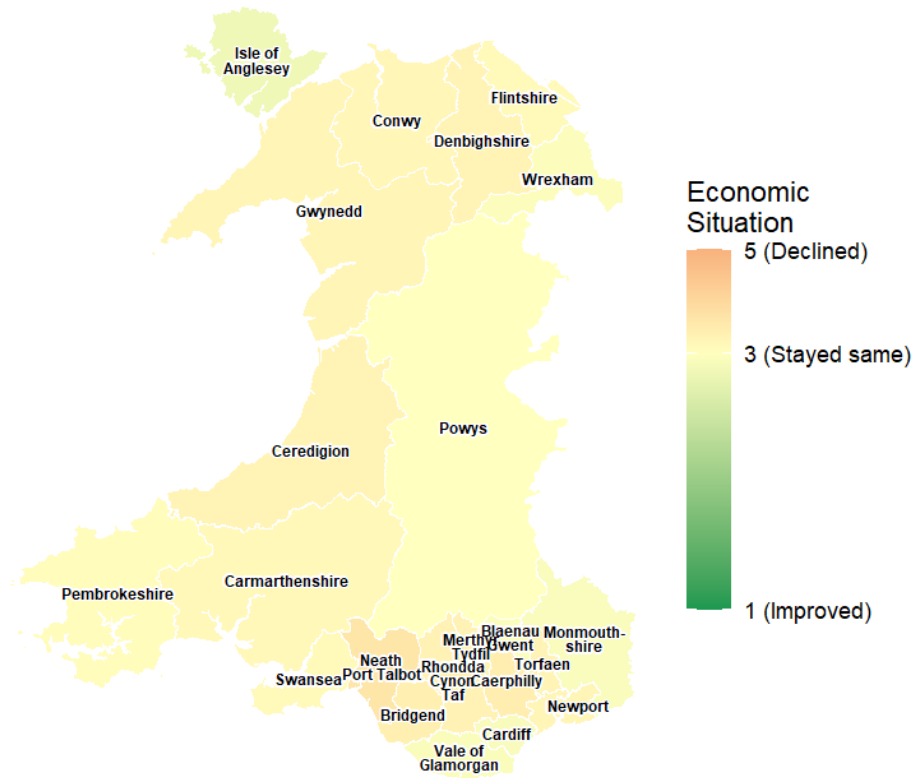


Figure 9 – Perceptions of my local area

Table 8 - How has the general economic situation changed i) in your local area/Wales over the last 12 months, and ii) for you and your household since the previous Senedd election in 2021?

Economic situation	Improved a lot	Improved a little	Stayed about the same	Declined a little	Declined a lot	Don't know	Prefer not to say
Wales	0.4%	3.8%	16.8%	30.2%	33.7%	12.4%	2.6%
Local Area	0.6%	3.5%	22.7%	31.4%	27.1%	12.4%	2.2%
Household	2.0%	7.5%	27.0%	30.8%	24.0%	NA	8.7%

Taken together, these data suggest that whilst the economic context has become increasingly challenging over recent years, people remain generally positive about the places where they live. The findings point to a generally positive sense of living in cohesive communities in many parts of Wales.



Weighted Average = 3.85

Figure 10 - How has the economic situation in your local area changed over the last 12 months?

Annex - Tables with distribution of responses

The annex provides the data in tables for the figures presented in the report.

Table A1 – How satisfied or dissatisfied are you with the way democracy works in Wales?

Satisfaction Level	%
Very satisfied	4.0%
Fairly satisfied	39.0%
Fairly dissatisfied	21.7%
Very dissatisfied	11.0%
Don't know	20.4%
Prefer not to say	3.8%

Table A2 - It doesn't matter which political party is in government in Wales

Opinion	%
Strongly agree	6.3%
Tend to agree	13.0%
Neither agree nor disagree	16.8%
Tend to disagree	21.5%
Strongly disagree	38.3%
Prefer not to say	4.1%

Table A3 - When you think about the upcoming Welsh Parliament/Senedd election, what is the main emotion that you feel?

Emotion	Frequency
hope	738
disappointed	578
frustration	487
worried	453
waste	447
despair	432
change	330
fear	330
indifference	316
anxiety	264
anger	258
concerned	240
confusion	216

angry	200
uncertain	200
hopeless	158
disgust	119
bad	116
apathy	108
excited	108
anxious	106
nervous	95
dismay	84
illegal	84
unhappy	84
pointless	80
distrust	78
apprehensive	76
trepidation	72
depressed	68
annoyance	62
improve	62
dread	61
confidence	60
winning	48
resignation	47
honest	45
happy	40
worse	38
broken	36
ruined	36
disillusionment	33
lie	33
hate	32
lose	32
terrible	32
disaster	30
independence	30
pride	30
destroyed	27
disheartened	27
irritation	27
chaos	24
discontent	24
doubt	24
proud	24
remove	24
chance	23
helpless	22

apathetic	21
failing	21
gain	21

Table A5 - How much do you feel you know about how Wales is run?

Level of Knowledge	%
A great deal	5.3%
A fair amount	29.8%
Just a little	43.0%
Nothing at all	18.0%
Prefer not to say	3.9%

Table A5 - Knowledge of the policy responsibilities of the Welsh Government vs UK Government

Policy Area	Correct Answer	Correct Attribution (%)
Defence and foreign affairs	UK Government	81.8%
Language and culture	Welsh Government	70.8%
Courts and criminal justice	UK Government	70.7%
Roads	Welsh Government	69.3%
Welfare and benefits	UK Government	68.8%
Broadcasting and media	UK Government	67.5%
Housing	Welsh Government	59.5%
The NHS	Welsh Government	49.6%
Agriculture	Welsh Government	44.9%
Policing	UK Government	41.6%
Business and economic development	Welsh Government	41.1%

Table A6 Knowledge of the policy responsibilities of the Welsh Government vs UK Government (by age)

Note: The percentage of respondents in each age group who correctly identified the level of government responsible for each policy area.

Policy Area	16-24	25-44	45-64	65+
Agriculture	44.5%	40.2%	44.8%	52.6%
Broadcasting and media	53.5%	67.5%	72.4%	72.3%
Business and economic development	31.1%	36.3%	45.6%	48.1%
Courts and criminal justice	57.9%	68.5%	75.5%	78.0%
Defence and foreign affairs	70.2%	78.3%	86.7%	89.7%
Housing	48.9%	52.9%	65.1%	68.2%
Language and culture	63.0%	65.1%	74.3%	80.9%
Policing	34.8%	42.6%	44.5%	42.8%
Roads	56.3%	65.4%	72.9%	78.4%
The NHS	28.0%	42.0%	55.5%	62.7%
Welfare and benefits	51.7%	66.7%	75.7%	74.7%

Table A7 - How satisfied are you with your life nowadays?

Satisfaction Level (0-10)	%
0 Very dissatisfied	2.0%
1	1.3%
2	1.7%
3	4.0%
4	4.6%
5	10.9%
6	11.6%
7	20.7%
8	23.3%
9	9.1%
10 Very satisfied	9.5%
Prefer not to say	1.2%

Table A8 - How satisfied are you with your local area as a place to live?

Satisfaction Level (0-10)	%
0 Very dissatisfied	2.1%
1	0.8%
2	2.1%
3	3.0%
4	5.4%
5	9.4%
6	10.1%
7	17.7%
8	21.7%
9	11.6%
10 Very satisfied	15.3%
Prefer not to say	0.7%

Table A9 - Perceptions of my local area

Perception of local area	Strongly agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Strongly disagree	Don't know	Prefer not to say
People pull together to improve it	7.4%	30.5%	29.7%	18.0%	7.4%	6.4%	0.6%
People from different backgrounds get on well together	10.9%	42.9%	22.1%	10.2%	4.2%	8.9%	0.7%
I feel proud to live in my local area	22.7%	36.5%	23.1%	9.6%	5.6%	1.6%	0.9%
People treat each other with respect and consideration	14.2%	45.4%	18.5%	13.1%	5.7%	2.5%	0.6%