

# Thinks

— Insight & Strategy —



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Llywodraeth Cymru  
Welsh Government

July 2024

## Is Wales getting innovation right?

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A report by Thinks Insight & Strategy for the  
Welsh Government

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## 1. Background and methodology

In February 2023, the Welsh Government published its new Innovation Strategy, Wales Innovates, followed up by a delivery plan in October the same year. This strategy was underpinned by three core commitments:

- Geographic and demographic equality,
- a thriving innovation culture,
- a joined up, collaborative way of working.

During the development of this strategy, the Welsh Government engaged stakeholders, including the public, extensively to ensure it will drive a culture of innovation in Wales and support more people to participate in it regardless of their demographic or where they live.

In 2019, Thinks Insight and Strategy undertook a piece of research to understand public attitudes to innovation of adults aged 18+ in the UK, commissioned by Nesta. As part of this, region specific reports were delivered, including one specific to Wales titled 'Is Wales Getting Innovation Right?'. This report was used to structure the Welsh Government's engagement with stakeholders and the public.

In April 2024, the Welsh Government commissioned Thinks Insight to re-run the survey used in 2019 but this time specific to Wales only, to identify how, if at all, views of the Welsh public have changed towards innovation over the last four years.

In order to do this, Thinks Insight conducted a 15-minute online quantitative survey with n=1027 Welsh adults aged 18+, between 10<sup>th</sup>-24<sup>th</sup> May 2024. Data was weighted by age, gender, region and socio-economic group to be representative of all Welsh adults.

## 2. Key findings

- **Overall, Welsh public opinion towards the future has remained relatively stable since 2019.** Uncertainty towards the future remains, and this uncertainty is particularly being felt by young adults (18-24 year olds). This is coupled with a sense of disempowerment in shaping the future of the country.
- **There remains a disconnect between how much influence the Welsh public think they have on innovation, and how much they want to have on innovation.** The Welsh public continue to feel that they do not have an opportunity to shape the long-term vision for Wales, and are more likely to feel that there *is* a long-term vision for Wales now, than they felt there was for the UK overall in 2019.
- **However, opportunities to shape the future are not equal:** in the current system, there is felt to be more opportunity for those who are well-off or influential.
- **The Welsh public continue to have a good idea about what innovation is, most commonly defining it as 'new ideas'.** However, there is less awareness of innovation happening now in different aspects of society now, than 2019.
- **Innovation is generally perceived to have a positive impact on the lives of the Welsh public – but clear winners remain amongst those who benefit from innovation the most.** People on higher incomes, people in work, and people who live in towns/cities are still seen as those who benefit the most from innovation.
- **2024 has seen a slight shift in perceptions of how innovation should be targeted,** with economic growth, improving education, and increasing employment all seeing significant increases as areas of innovation that are most important to society, vs. 2019.
- **The principles favoured by the Welsh public to guide innovation funding and investing are consistent with 2019.** The focus is perceived to be on helping the most people, benefitting the entire country, and solving social problems, even if it doesn't impact the economy positively.
- **The Welsh public understand that different actors are involved in different areas and stages of innovation,** but they still want less private sector company control, and more influence for themselves.
- **There remains low awareness of the 'Wellbeing of Future Generations Act', along with the recently published innovation strategy for Wales, "Wales Innovates" –** and those who are aware have not noticed any impact on decision makers.

### 3. Perceptions towards the future

Perceptions towards the future amongst the Welsh public have remained relatively stable since 2019. **In 2019, the Welsh public showed uncertainty towards the future. 5 years later in 2024 this uncertainty remains,** alongside a sense of disempowerment in shaping the future of the country.

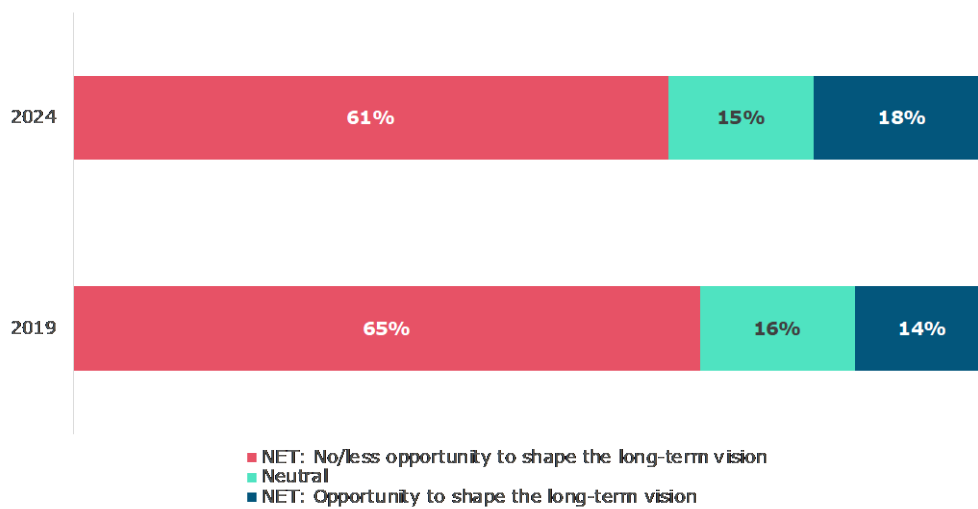
- **A majority (63%) feel uncertain about the future,** a slight increase from 2019 (59%).
  - **This uncertainty is significantly higher amongst younger people** vs. the Welsh public overall, (73% of 18-24 year olds agree with the statement 'I often feel uncertain about the future', vs. 63% of Welsh adults).
- **Over half (56%) say that they often feel the world is changing too quickly,** consistent with 2019 (54%).
  - However, not all change is perceived as bad: over half (54%) also feel that change in culture and society is usually a good thing.
- **61% of the Welsh public continue to feel that they do not have an opportunity to shape the future,** and this is significantly higher amongst those who are less aware of innovation<sup>1</sup> (78%) vs. those who are aware of innovation<sup>2</sup> in Wales (42%).
  - Approximately half (52%) say that **in the current system, only people who are well-off or influential are able to get involved in innovation,** consistent with 2019 (50%).

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<sup>1</sup> Defined as those who code 'None' on at least 6 codes at Q4 'How much innovation, if any, have you seen or heard about in each of the following areas?'

<sup>2</sup> Defined as those who code who code Any on at least 6 codes at Q4 'How much innovation, if any, have you seen or heard about in each of the following areas?'

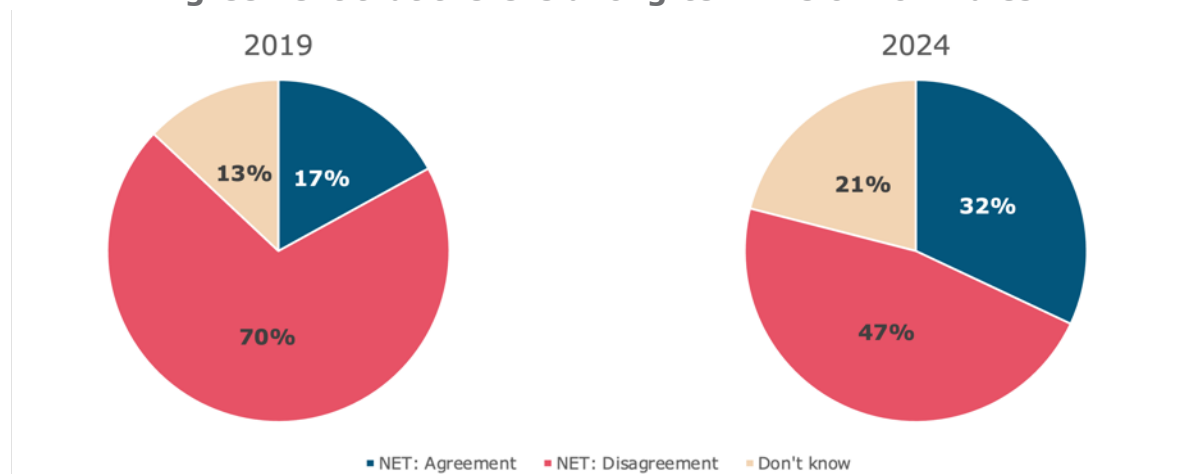
**Opportunity to shape the long-term vision for Wales:**



Q17. Overall, how much of an opportunity do you feel you have to shape the long-term vision for the country? Base, 2019: n=1012, 2024: n=1027

**Agreement in there being a long-term vision for Wales is significantly higher in 2024 (32%) than 2019 (17%).**

**Agreement that there is a long-term vision for Wales:**



Q16. Overall, how much agreement, if any, do you think there is in Wales around a long-term vision for the country? Base, 2019: n=1012, 2024: n=1027

**Of the statements tested, the Welsh public in 2024 are most likely to agree that allowing people to take risks and fail is what drives society forward (71%),** indicating appetite for innovation and change.

- There are no statistical differences in agreement of Welsh adults with the statements tested about the future, between 2019 and 2024.

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- **Notably, the Welsh public are less likely to be negative about the long-term future of Wales in 2024, vs. how they felt about the future of the UK in 2019** – 30% of the Welsh public disagree with the statement 'I feel positive about the long-term future of Wales', vs. 38% who felt the same about the future of the UK in 2019.

Statement	2019 - % agreeing with the statement	2024 - % agreeing with the statement
I feel positive about the long-term future for Wales*.	37%	41%
Under the current system, only people who are well-off or influential are able to get involved in innovation.	50%	52%
Change in culture and society is usually a good thing.	53%	54%
I often feel like the world is changing too quickly.	54%	56%
I often feel uncertain about the future.	59%	63%
Allowing people to take risks and fail is what drives society forward.	68%	71%

*\*Note, in 2019 this statement was 'I feel positive about the long-term future for the UK'*

Q2. To what extent do you agree or disagree with the following statements? *Please select the relevant number on the scale below to indicate your response, where 1 is strongly disagree and 7 is strongly agree.* Base, 2019: n=1012, 2024: n=1027

## 4. Understanding and awareness of innovation

The Welsh public have a good understanding of what 'innovation' means, consistent with 2019.

- **Unprompted perceptions of the definition of 'innovation' remain similar to 2019**, with the focus being on new ideas or concepts or improving and adapting something existing for the better.

When you hear or see the word 'innovation', what do you understand it to mean?	
Coded response	% of sample
"It is something new / coming up with something new"	32%
"It is about ideas / coming up with new concepts"	29%
"It is about adapting / changing for the better / making improvements"	21%
"It is about new products / services / coming up with inventions"	18%
"It is about methods of doing something / coming up with new methods / processes"	17%
"It is about originality / doing things differently / things that have never been done before"	14%
"It is about being creative / imaginative / thinking outside the box"	11%
"It involves a positive outcome / delivers benefits / serves a purpose"	11%
"It is about advancing / developing / moving forward"	9%

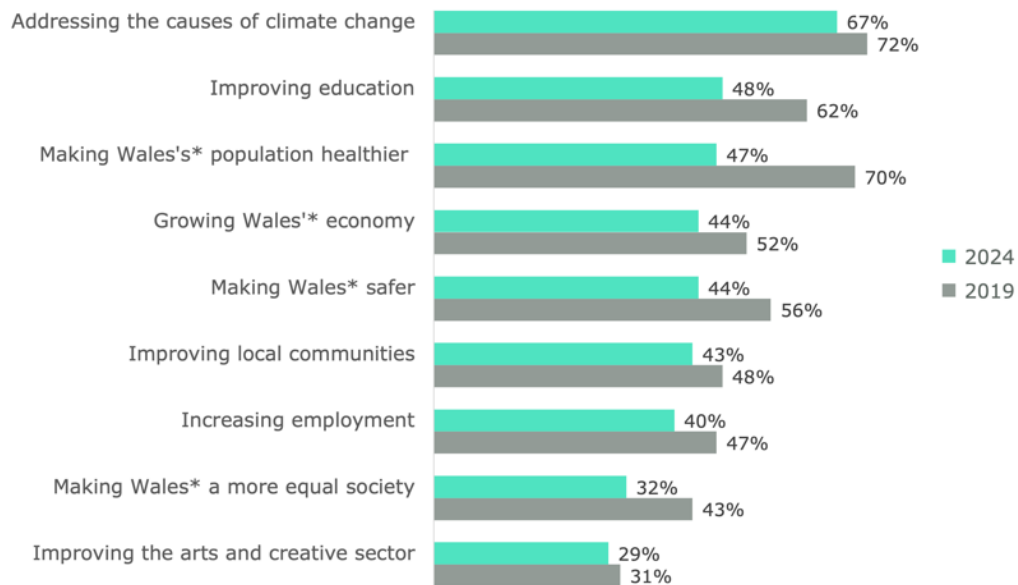
Q1. When you hear or see the word 'innovation', what do you understand it to mean? Base, 2024: n=1027



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- Despite high awareness of what innovation is, **overall recognition and awareness of innovation in different areas has decreased since 2019.**
  - Climate change (67%), improving education (48%), and making Wales' population healthier (47%) remain the top 3 areas of innovation heard about, but all have seen a reduction vs. 2019.

### Percentage of people who have heard about innovation in the given areas:



*\*Note, in 2024 'UK' has been replaced with 'Wales'.*

Q4. How much innovation, if any, have you seen or heard about in each of the following areas? Base, 2019: n=1012, 2024: n=1027

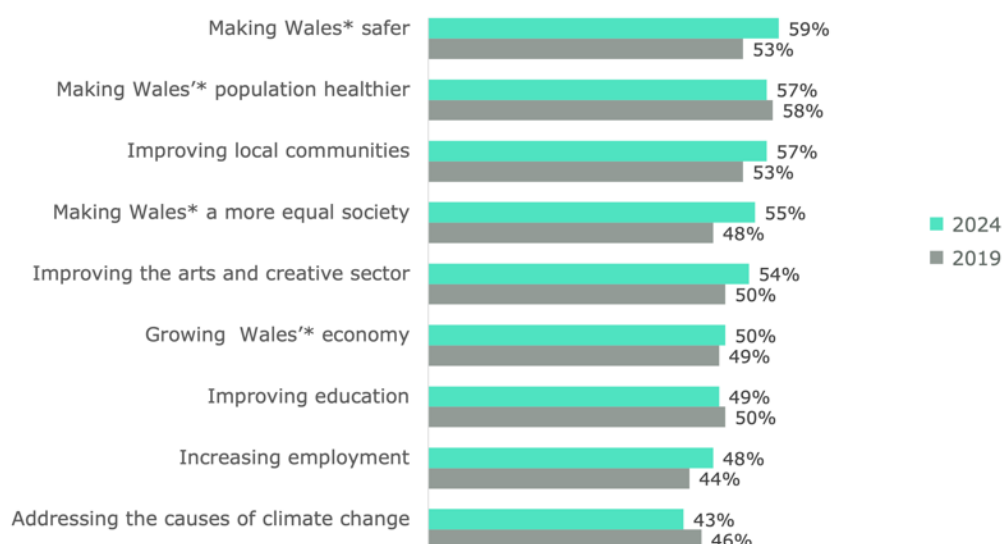
- **Younger people (18-24) are more likely to have heard about innovation vs. the average, and particularly vs. older age groups (55-64 and 65+) for all areas, except addressing causes to climate change** - for which awareness is largely consistent across age groups.
  - The biggest age difference in awareness by age is around innovations making Wales a more equal society: 55% of 18-24s have heard about this vs. 32% overall with older age groups hearing about it less (20% for 55-64 year olds and 26% for 65+).

## 5. Impact of innovation

In areas where the Welsh public are aware of innovation, in general, this **innovation is seen as having made the Welsh public's lives better.**

- More than two in five Welsh adults say that each of the areas tested have made their lives better.
- The two areas that see the biggest improvement in score are areas that in 2019 were asked about the UK as opposed to Wales, safety and equality. 'Making Wales safer' and 'Making Wales a more equal society' see a 6% and 7% increase respectively vs. when the statement was asked about the UK in 2019.
  - This, coupled with an improvement in the score of 'Improving local communities' points to local, Welsh-specific innovation having impact.

### Perceived impact of innovation on the Welsh public's lives:



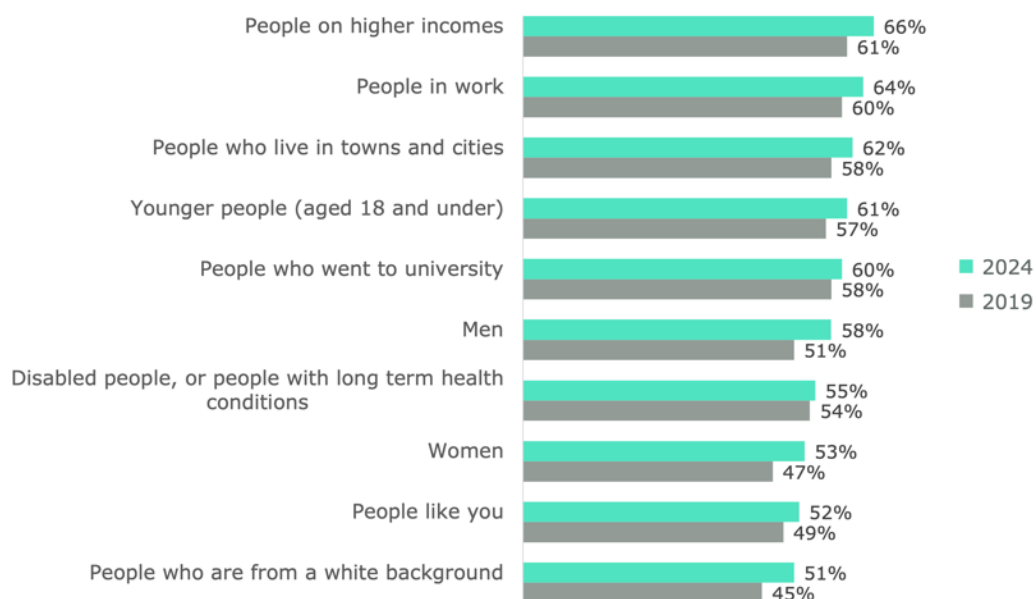
\*Note, in 2024 'UK' has been replaced with 'Wales'.

Q5. To what extent, if at all, has innovation in each of these areas made your life better, or worse? *Scale: Much better / a bit better / neither better nor worse / a bit worse / a lot worse / don't know* Base: All respondents who have seen/heard about an innovation at Q4

**In Wales, some individuals are perceived as clear 'winners' due to innovation, while other groups are seen as less likely to benefit.**

- **Groups defined as benefiting more from innovation remain broadly the same as 2019**, with the top three remaining as people on higher incomes (66%), people in work (64%), and people who live in towns and cities (62%).

### Top 10 groups most positively impacted by innovation - % selecting each group:

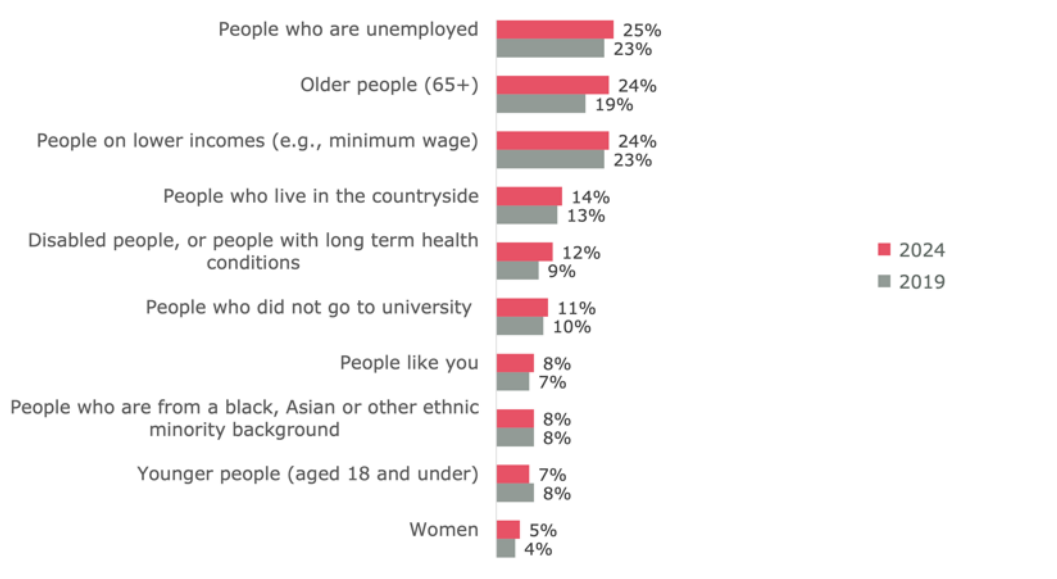


Q3. How positive or negative is the impact of innovation on each of the following groups of people?  
 Scale: *Very positive impact / somewhat positive impact / neither a positive nor negative impact / somewhat negative impact / very negative impact / don't know*. Base, 2019: n=1012, 2024: n=1027

- **We also continue to see consistency with 2019 when looking at whether 'people like you' are perceived to benefit from innovation.** Those who are from socio-economic group C2DE are significantly less likely to say innovation had a positive impact on them (41%) vs. those from group ABC1 (58%).
  - Older age groups, 55-64 and 65+, are also less likely to say innovation has had a positive impact on them (47% for each) vs. younger age groups, 18-24 and 25-34 (62% for each).

**The trend of innovation being perceived to negatively impact people who are unemployed, older (65+), or on lower incomes continues since 2019.** Around a quarter of the Welsh public state that innovation negatively impacts each of these groups.

### Top 10 groups most negatively impacted by innovation - % selecting each group:



Q3. How positive or negative is the impact of innovation on each of the following groups of people?  
 Scale: *Very positive impact / somewhat positive impact / neither a positive nor negative impact / somewhat negative impact / very negative impact / don't know*. Base, 2019: n=1012, 2024: n=1027

- **These groups are also perceived to feel the lowest positive impact from innovation according to the Welsh public**, with almost as many people seeing innovation having a negative effect, as a positive effect.

Group	% positive impact	% negative impact
People who are unemployed	26%	25%
Older people (aged 65+)	36%	24%
People on lower incomes (e.g. minimum wage)	32%	24%

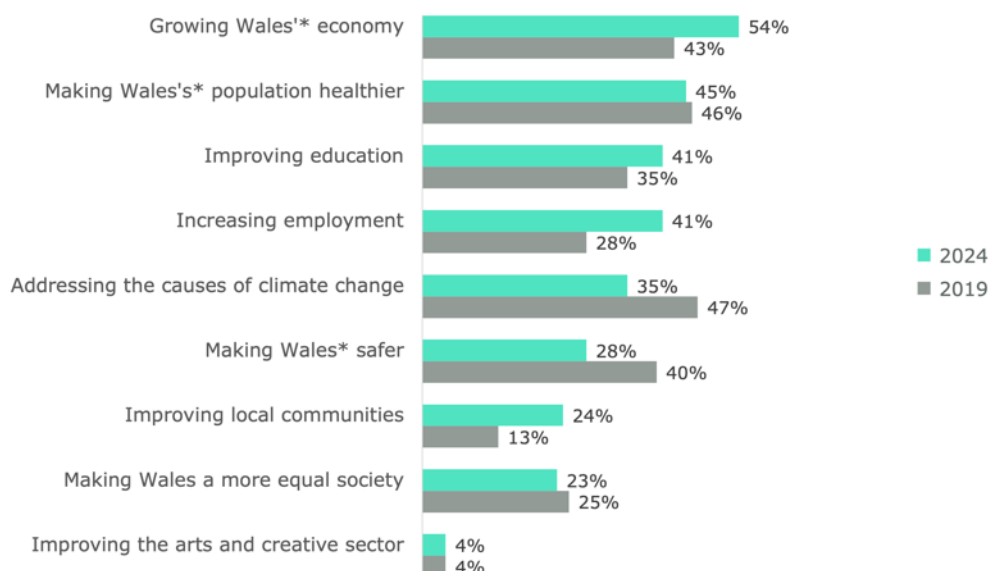
Q3. How positive or negative is the impact of innovation on each of the following groups of people?  
 Scale: *Very positive impact / somewhat positive impact / neither a positive nor negative impact / somewhat negative impact / very negative impact / don't know*. Base, 2019: n=1012, 2024: n=1027

## 6. How innovation should be targeted and prioritised

2024 sees a shift in the areas of innovation that the Welsh public thinks are most important to society – with economic growth, improving education, and increasing employment all seeing significant increases vs. 2019.

- Growing Wales' economy (54%) is seen as the most important area of innovation to society, and has seen the biggest increase in perceived importance since 2019 (43%),** which may be due to the Cost of Living crisis since this research was previously conducted.
  - Whilst improving local communities has also seen an 11% increase since 2019 (13% to 24% in 2024), the perceived importance of innovation in this area is much lower.
- The Welsh public are now more likely to see improving education (45%) and increasing employment (41%) as more important to society vs. 2019 (35% for education and 28% for employment).**
- However, the Welsh public are now less likely to see innovation that addresses the cause of climate change (35%) and innovation that addresses safety (28%) as important than in 2019 (47% for climate change, and 40% for safety).**

Areas for innovation that are most important to society - % selecting each in their top 3:



\*Note, in 2024 'UK' has been replaced with 'Wales'.

Q6. And in which of these areas do you think that innovation is most important to society? Please select up to three options. Base, 2019: n=1012, 2024: n=1027

- **Different demographics see different areas of innovation as more important to society:**

- Younger people (18-24) are significantly more likely to consider improving education (53%), making Wales safer (38%), making Wales a more equal society (34%), and improving the arts and creative sector (9%) as important vs. these areas' respective averages.
- Older people (65+) are more likely to consider making Wales' population healthier as important vs. the average (57% vs. 45%).
- People from socio-economic group C2DE consider making Wales safer a more important area of innovation vs. the average (34% vs. 28%).

**The level of importance the Welsh public place on these areas of innovation also broadly aligns with the innovation areas that the Welsh public believe the Government should fund and invest.**

Areas for innovation	% selecting in their top 3 for areas most important to society	% selecting in their top 3 for areas most important to fund/invest
Growing Wales' economy	54%	56%
Making Wales' population healthier	45%	44%
Improving education	41%	38%
Increasing employment	41%	42%
Addressing the causes of climate change	35%	31%
Making Wales safer	28%	28%
Improving local communities	24%	27%
Making Wales a more equal society	23%	25%
Improving the arts and creative sector	4%	4%

Q9. Which of the following do you think is most important for how the Government funds and invests in innovation in Wales? *Please select up to three options.* Base, 2019: n=1012, 2024: n=1027

**The principles favoured by the Welsh public to guide innovation funding and investment are broadly consistent with 2019:**

- **The Government should continue to invest in innovation that benefit a greater number of people – even if this impact is small.**
  - 82% of the Welsh public support the statement that ‘The Government should invest in innovation that has significant positive impact on a small number of people’ vs. a larger impact on a smaller number of people (18%) – this remains consistent with 2019:

Statement	% selecting in 2019	% selecting in 2024
The government should invest in innovation that has a significant positive impact on a small number of people	17%	18%
The government should invest in innovation that has a smaller positive impact on a larger number of people	83%	82%

Q7. For each of the following pairs of statements please indicate which comes closest to your view. Base, 2019: n=1012, 2024: n=1027

- **Innovation should benefit the whole country, focusing on making everywhere in the country prosperous,** rather than improving the overall economy which may cause an imbalance in impact (i.e. some places doing better than others).
  - 69% of the Welsh public want innovation to benefit the whole country, regardless of whether progress in better-off areas is slower, compared to just 31% who say when investing in innovation, government should focus on making everywhere in the country more prosperous, even if some areas do better than others.
  - This has become slightly more important to the Welsh public than in 2019, overtaking solving social problems, even if there is no economic benefit, as the second most important principle:

Statement	% selecting in 2019	% selecting in 2024
When investing in innovation, government should focus on improving a country’s economy overall, even if some places (e.g. certain cities and towns) do better than others	30%	31%

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When investing in innovation, government should focus on making everywhere in the country more prosperous, even if this means that the progress in better-off areas is slower than it might have been otherwise	70%	69%
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Q7. For each of the following pairs of statements please indicate which comes closest to your view. Base, 2019: n=1012, 2024: n=1027

- **Solving social problems should be the priority of innovation, economic benefit is not a 'must' when investing in innovation.**
  - Despite a slight decrease since 2019, 65% of the Welsh public believe the Government should invest in innovation if it solves social problems, regardless of economic benefit (vs. 71% in 2019). This is opposed to 35% who believe innovation should only be invested in if it has an economic benefit:

Statement	% selecting in 2019	% selecting in 2024
The government should only invest in innovation if it will lead to an economic benefit for the country	29%	35%
The government should invest in innovation if it solves social problems, even if it doesn't necessarily have any economic benefit	71%	65%

Q7. For each of the following pairs of statements please indicate which comes closest to your view. Base, 2019: n=1012, 2024: n=1027

**In 2024, whilst the Welsh public still believe innovation should focus on long-term benefit overall, fewer people agree than in 2019.**

- Despite the majority of the Welsh public still thinking innovation should focus on long-term issues, even if it means ignoring present issues, there has been a significant drop from 61% in 2019, to 52% in 2024:

Statement	% selecting in 2019	% selecting in 2024
Innovation should focus on the issues that affect the world now and not worry about the longer-term	39%	48%
Innovation should focus on longer-term issues, even if that means ignoring issues that affect us now	61%	52%

Q7. For each of the following pairs of statements please indicate which comes closest to your view. Base, 2019: n=1012, 2024: n=1027



- This slight shift towards innovation benefitting the present is also echoed in the **change of public opinion towards it being important that innovation improves the lives of current generations, rather than focusing on future generations**. Despite a relatively even split between this opinion and innovation improving future generations, wanting it to benefit current generations is now the majority opinion (53% in 2024, to 46% in 2019):

Statement	% selecting in 2019	% selecting in 2024
It is more important that innovation improves the lives of future generations, rather than current generations	54%	47%
It is more important that innovation improves the lives of current generations, rather than focusing on future generations	46%	53%

Q7. For each of the following pairs of statements please indicate which comes closest to your view.  
Base, 2019: n=1012, 2024: n=1027

**In the remaining areas, there is less agreement on the principles that guide innovation:**

% selecting each as coming closest to their view			
58%	I would be happy to share my personal data if it meant that innovation could take place	42%	I would be unhappy to share my personal data for the purposes of innovation
52%	We should be prepared to limit the use of innovation and new technology if they have the potential to lead to inequality or disadvantage certain groups of people	48%	The good brought about by innovation and new technology will ultimately outweigh any inequality or disadvantage – so there is no need to slow down progress
51%	Decisions about innovation should be made by experts, even when they disagree with most of the general public	49%	Decisions about innovation should be made by the general public, even if they disagree with experts
52%	Innovation is worthwhile if it improves a country's economy, even if that means some people lose their jobs	48%	Innovation is not worthwhile if it causes people to lose their jobs, even if it improves a country's economy overall

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Q7. For each of the following pairs of statements please indicate which comes closest to your view. Base, 2019: n=1012, 2024: n=1027

**However, some opinions differ by demographics:**

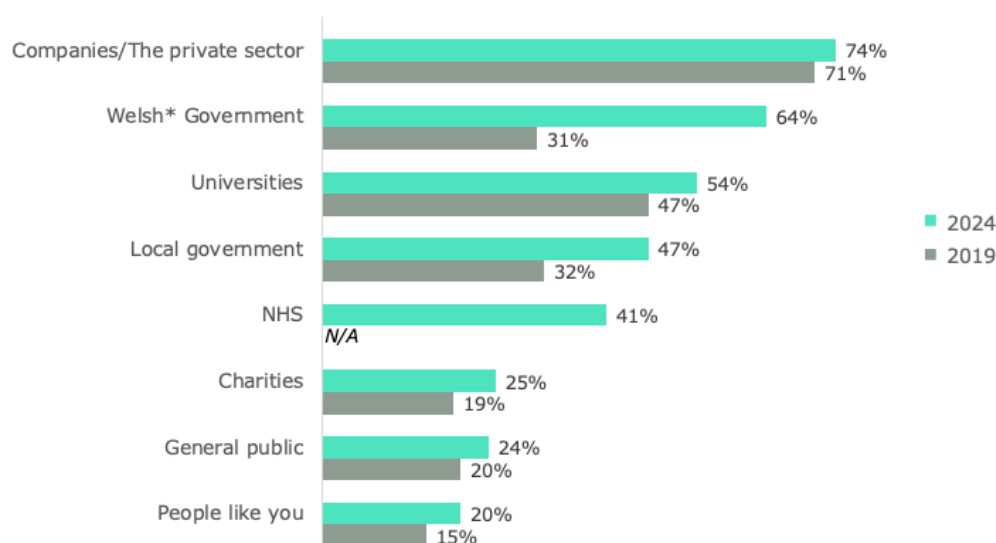
- Younger age groups (62% of 18-24s and 63% of 25-35s) are more likely to say that the use of innovation and new technology should be limited if it has the potential to lead to inequality, vs. older people (48% of people aged 65+).
  - Women (62%) are also more likely to hold this opinion than men (48%).
  - Older age groups (58% of 55-64s and 60% of people aged 65+) are also more likely to see innovation as worthwhile even if some people lose their jobs, vs. the youngest age group (41% of 18-24s).

## 7. Innovation actors

Whilst **private sector companies remain the actors that are perceived to have the most decision-making power over innovation, more people believe that the Government has decision-making power over innovation in 2024, than in 2019.**

- **The parties that the Welsh public believe have the most power over innovation remain consistent with 2019.** The majority believe private sector companies (74%), the Welsh Government (64%), and local universities (54%) are perceived to have the most decision-making power.
- However, **people who see the Welsh Government as influential in 2024 has seen a significant increase** from those who saw the UK government as influential in 2019 (64% from 31%). Local government also sees a significant increase in 2024, from 32% in 2019 to 47% this year. This could indicate that activities by the Welsh Government are increasing awareness of its innovation actions.

**How much decision-making power over innovation the Welsh public thinks each group has - % selecting influence:**



\*Note, in 2024 'UK' has been replaced with 'Wales'.

Q10. How much decision-making power if any, do you think each of the following groups of people currently have over innovation? Please select the relevant number on the scale below to indicate your response, where 1= no influence, and 7= a lot of influence. Base, 2019: n=1012, 2024: n=1027

**However, there is a disconnect between who the Welsh public thinks *has* power and who they believe *should* have power.**

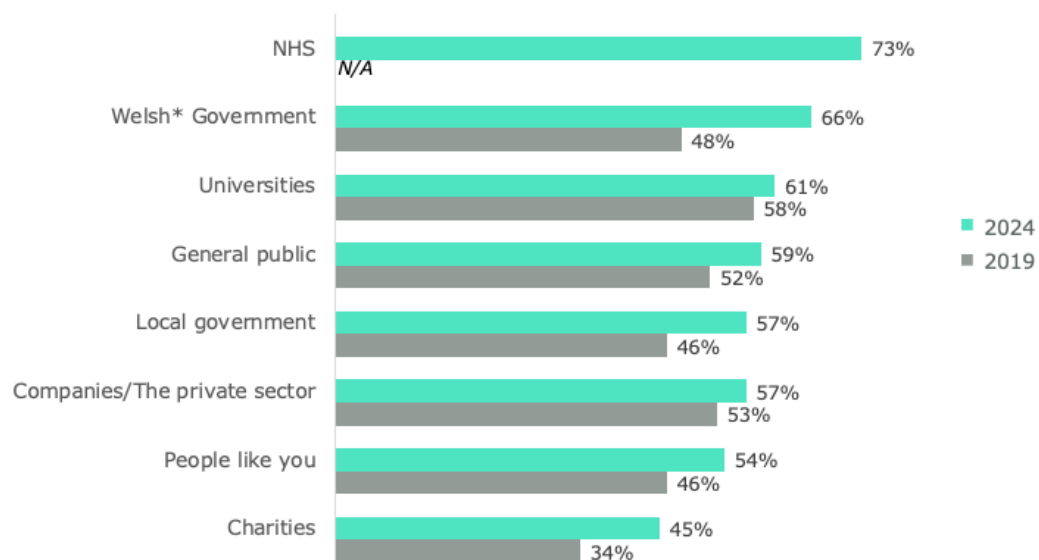
- Whilst the Welsh public think the Welsh Government (66%) and universities (61%) should have decision-making power over innovation – **they are much less keen on wanting private sector companies to, despite thinking they have the most power at present.** This is

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consistent with 2019 (57% want private sector companies to have decision-making power vs. 74% who believe they have).

- Instead, the Welsh public are most likely to say that the NHS (73%), the Welsh Government (66%), and universities (61%), should have decision-making power.
- **There is also appetite for the Welsh public to have some decision-making power over innovation, increasing from 2019.** 59% want the general public to have influence vs. 52% in 2019, and 54% want to have influence themselves vs. 46% in 2019.
  - This highlights another disconnect: the **Welsh public want more influence over decision-making than they believe they have.** Only 24% believe the general public has decision-making power, with just 20% believing they themselves have decision-making influence over innovation.

### How much decision-making power over innovation the Welsh public thinks each group should have - % selecting influence:



\*Note, in 2024 'UK' has been replaced with 'Wales'.

Q11. How much decision-making power, if any, do you think each of the following groups of people should have over innovation? Please select the relevant number on the scale below to indicate your response, where 1= no influence, and 7= a lot of influence. Base, 2019: n=1012, 2024: n=1027

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When reviewing stages of innovation, **the Welsh public are clear on who should be most responsible for innovation at the different stages.** This responsibility remains consistent with 2019:

Stages of innovation						
	Planning for the future	Coming up with new ideas	Developing new ideas	Manufacturing goods	Delivering services	Adapting to change
Responsibility (2019):	Govt	Mixed	Business	Business	Business	Individuals
<b>Responsibility (2024):</b>	<b>Govt</b>	<b>Mixed</b>	<b>Business</b>	<b>Business</b>	<b>Business</b>	<b>Individuals</b>
Government	<b>59%</b>	8%	11%	4%	25%	24%
Business	11%	<b>30%</b>	<b>43%</b>	<b>86%</b>	<b>61%</b>	14%
Individuals	15%	<b>27%</b>	14%	4%	5%	<b>47%</b>
Universities*	3%	<b>27%</b>	25%	1%	1%	2%

\*Note, not an option in 2019.

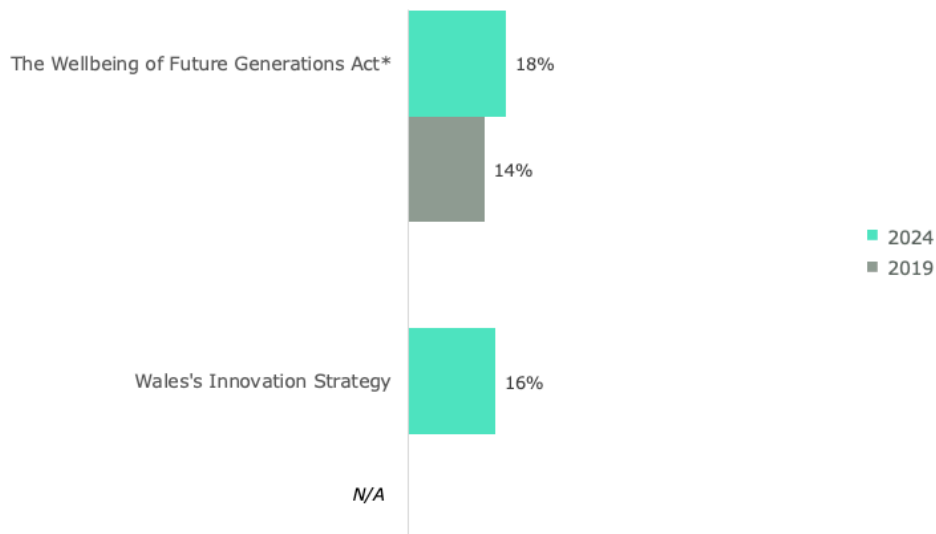
Q12. Of the groups below, please indicate who you think should be most responsible for each of the following stages of innovation. Base, 2019: n=1012, 2024: n=1027

- The introduction of universities in 2024 sees a clear perceived role for them to play in coming up with new ideas and developing new ideas.

**Overall awareness of what the Welsh Government is doing regarding innovation is low.** The majority of the Welsh public are unfamiliar with Wales' Innovation Strategy, Wales Innovates, with just 16% claiming to have heard of it.

Note, Wales' Innovation Strategy, Wales Innovates, was published in 2023.

**Percentage of the Welsh public who have heard of the below:**



*\*Note, tested as 'The Wales Future Generations Act' in the survey.*

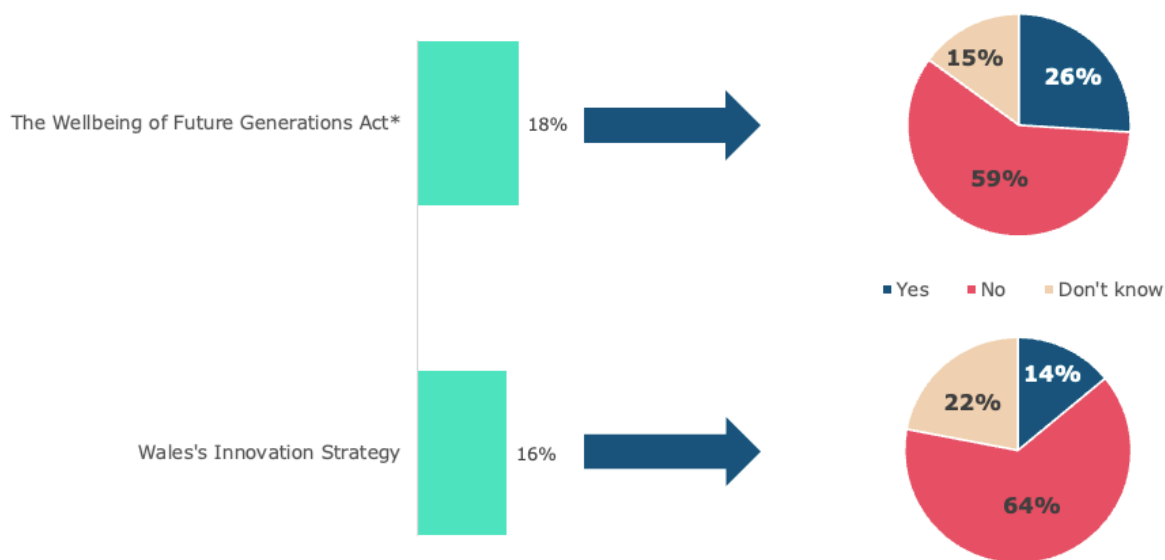
Q13. How much, if anything, have you heard about...? Base, 2019: n=1012, 2024: n=1027

- The majority of the Welsh public are also unfamiliar with the 'Wellbeing of Future Generations Act', with only 18% claiming to have heard of it, similar to 2019 (14%).

**Even members of the Welsh public who are aware of either the 'Wellbeing of Future Generations Act' or Wales' Innovation Strategy, Wales Innovates, struggle to have noticed a difference in the way decision-makers have acted as a result.** However, since 2019, there has been a slight increase in difference noticed by those aware of the 'Wellbeing of Future Generations Act', from 22% in 2019, to 26%.

**How much the Welsh public have heard of the below - % who have heard:**

**Has a difference been noticed in how decision-makers act as a result of the below:**



\*Note, tested as 'The Wales Future Generations Act' in the survey.

Q13. How much, if anything, have you heard about...? Base, 2019: n=1012, 2024: n=1027

Q14. Have you noticed any differences in the way that decision-makers in Wales have acted as a result of...?

Base, aware of 'The Wales Future Generations Act' n=333, aware of 'Wales' Innovation Strategy' n=162

Despite small base sizes, we do see some distinction between the 'Wellbeing of Future Generations Act' and Wales' Innovation Strategy, Wales Innovates, in how they have impacted decision-makers in Wales.

- When asked about the 'Wellbeing of Future Generations Act', responses focus on strategic thinking and the environment:

<b>What differences have you noticed in the way that decision-makers in Wales have acted as a result of the 'Wellbeing of Future Generations Act*'?</b>	
<b>Coded response</b>	<b>% of sample</b>
"Planning / decision making / strategic thinking have been impacted"	28%
"The environment / sustainability / renewables have been impacted"	22%

Is Wales getting innovation right?

"The needs of future generations have been considered / prioritised"	17%
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*\*Note, tested as 'The Wales Future Generations Act' in the survey.*

Q15. What differences have you noticed in the way that decision-makers in Wales have acted as a result of...? Base, have noticed a difference due to the 'Wellbeing of Future Generations Act' n=49

- And when asked about Wales' Innovation Strategy, Wales Innovates, responses focus on the economy and creativity:

<b>What differences have you noticed in the way that decision-makers in Wales have acted as a result of Wales' Innovation Strategy, Wales Innovates?</b>	
<b>Coded response</b>	<b>% of sample</b>
"Investment has been impacted"	14%
"Innovation / creativity has been impacted"	22%
"The economy / jobs / growth have been impacted"	17%

Q15. What differences have you noticed in the way that decision-makers in Wales have acted as a result of...? Base, have noticed a difference due to the "Wales' Innovation Strategy" n=23



## 8. Conclusions and recommendations

There remains a real opportunity for the Welsh Government to push and lead innovation within Wales. The Welsh Government is considered second only after the NHS in terms of who the Welsh public think should have decision-making power over innovation in Wales.

However, there remains a disconnect between how much influence the Welsh public *think* they have on innovation, and how much they *want* to have. There is appetite amongst the Welsh public to be involved in shaping the long-term vision for Wales.

A key aim of the 2023 Innovation Strategy, Wales Innovates, was to support more people to participate, and benefit from innovation, regardless of demographic. However, awareness is low and public still sees clear 'winners' when it comes to innovation benefits (richer, urban based individuals). Awareness of this strategy, its goal of encouraging participation and innovation equality, and how people can get involved could be increased.

Awareness of innovation happening in different aspects of society is lower now, than in 2019. To support the Welsh Government leading innovation, it would be beneficial to raise awareness of what it has already achieved in Wales.

Since 2019, there has been a slight shift in the Welsh public's perceived priority areas for innovation. Economic growth, improving education, and increasing employment are all seen as more important to society now, than in 2019. These, along with making Wales's population healthier, are the areas that the Welsh Government should target to most align with the public's thinks about areas for innovation.

There are several areas that could be explored further through qualitative research with the Welsh public:

- Why has overall awareness and recognition of innovation in different areas decreased since 2019 in Wales? What could the Welsh Government be doing to increase awareness of innovation in Wales?
- People who are unemployed, older (65+), and people on lower incomes remain the top three groups perceived as most negatively impacted by innovation. With the new Innovation Strategy in 2023 underpinned by equality, why is it that these groups are considered to not benefit from innovation as much as others?
- The Welsh Government is seen to have influence over innovation decision-making and the Welsh public support it to make decisions about innovation. However, what should this influence and decision-making look like, and how should the Welsh public be informed of the Welsh Government's decisions relating to innovation?