



Adult Omnibus Survey 2019

General Attendance and Participation



Cyngor Celfyddydau Cymru
Arts Council of Wales



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Cover: Composer Teif Emerald working with Hijinx Theatre actors as part of Tŷ Cerdd's CoDI Move project (image: Matthew Thistlewood)

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Introduction

Background

The Arts Council of Wales has conducted an annual attendance and participation research survey every year since 1993. The basis of the survey is to collect data on attendance to arts events and participation in artistic activities and this information is collected via a series of questions asked on the Beaufort Research Ltd Wales Omnibus survey. A copy of the questionnaire used to collect the information is appended to this report.

This report summarises the findings of the latest survey conducted in November 2019, examining demographic and regional variations in attendance and participation. The report also covers key trends in this data over time.

Methodology

The fieldwork for the latest wave took place between 13-26 November 2019 and in total 1,021 interviews were conducted. The interviews were conducted in respondents' own homes using CAPI (Computer Aided Personal Interviewing) technology in a cross section of homes sampled by lower level super output area¹. The sample was designed to be representative of the adult population resident in Wales aged 16 years and over. Within each sampling point, interlocking quota controls on age, gender and social grade were used for the selection of respondents. The quotas were set to reflect the demographic profile of residents in Wales and no more than one person per household was interviewed. The resulting data was also weighted to fine tune any imbalances in the sample, to ensure that it was fully representative of the Welsh population.

¹ Lower level super output areas are a geographic hierarchy designed to improve the reporting of small area statistics in England and Wales. They are built from groups of contiguous Output Areas and have been automatically generated to be as consistent in population size and socio-economic makeup as possible.

Notes on Data Presentation

The data is presented in a series of line and bar charts, which show the percentage of people who have attended, or taken part in, each of the activities asked about in the survey. The results are also split out by key demographic groupings and regions, again showing the percentage of each demographic group or region who have attended or taken part in each activity. It is worth noting the regional definitions referred to throughout the report are the Arts Council of Wales definitions of region, which are as follows:

North	Anglesey, Conwy, Denbighshire, Flintshire, Gwynedd, Wrexham
South West	Carmarthenshire, Ceredigion, Neath Port Talbot, Pembrokeshire, Powys, Swansea
South Central	Bridgend, Cardiff, Merthyr Tydfil, Rhondda Cynon Taff, Vale of Glamorgan
South East	Blaenau Gwent, Caerphilly, Monmouth, Newport, Torfaen

Executive Summary

Over 8 in 10, 86.8% of adults in Wales attended an arts event at least once a year in 2019, which was the highest level of attendance to the arts since 2009.

Almost half, 49.3%, of all adults participated in an arts activity once a year or more in 2019, also the highest level of participation since 2009.

Women had higher levels of engagement with the arts in 2019 both in terms of attendance to arts events and participation in arts activities.

88.9% of women attended an arts event at least once a year compared to 84.5% of men. Attendance levels among women have increased by 6.6 percentage points since 2017 compared to an increase of 5.6 percentage points for men.

Just over half, 52.3% of women took part in arts activities once a year or more which was higher than men, with 46.1% taking part at least once a year.

Both in levels of attendance and participation there were higher levels of activity among the higher social grades during 2019. 93.2% of those in the ABC1 group attended an arts event at least once a year and 54.7% took part in an arts activity. This compares to 79.9% attending and 43.5% participating from the C2DE groups.

While over 9 in 10 (94.2%) young people aged 16-24 attended arts events once a year or more in 2019, three quarters of those aged 65+ attended at the same frequency during the year.

Levels of participation in the arts during 2019 were less varied across the different age groups, with close to 50% taking part in arts activities across each age range.

Almost 9 in 10 (89.1%) adults in the south central region attended arts events at least once a year or more in 2019, which was the area with the highest level of attendance. This follows the same pattern as 2018. Lowest levels in 2019 were found in the south west region where 83.8% of adults attended.

There were above average levels of participation in both the South East region, 57.2%, and the South Central region, 54.5% during 2019, with the South East region having the highest levels of participation during the year.

Just over 9 in 10, 92.3%, of those who speak welsh attended an arts event at least once a year in 2019, this compares to 85% of those who do not speak welsh. The gap between the two groups has widened from 2.9 percentage points in 2018 (86.9% of welsh speakers attending compared to 84% of non welsh speakers), to 7.3 percentage points in 2019.

There is no difference in levels of participation in the arts by welsh language, with 49% of both welsh speakers and non welsh speakers taking part in activities at least once a year in 2019. This continues the trend of 2018 when 45% of both groups took part in the arts.

As with the previous two years, the most frequently attended artform in 2019 was cinema, with 60% attending once a year or more. This was followed by other live music events with half, 49.9%, of adults attending this artform.

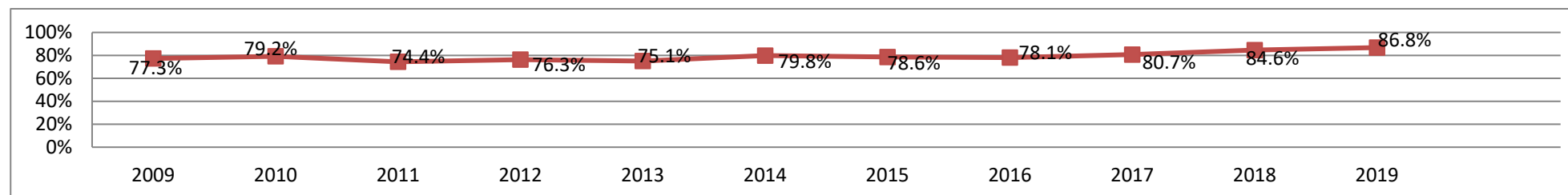
Levels of participation in 2019 continue to be highest among visual arts and craft activities, with 28.2% taking part at least once a year. Music was the second most popular artform with almost a fifth, 18.4%, taking part once a year or more.

Summary Report

Attendance to Arts Events

86.8% of adults attended arts events once a year or more in 2019, the highest level of attendance to the arts over the last ten years. This is an increase of 2.2 percentage points from the previous year and continues the upward trend in attendance levels since 2016

Levels of attendance to the Arts in Wales 2009-2019(% attending any of the 14 artforms once a year or more)



Base: All Adults (at least 1,000 per wave)

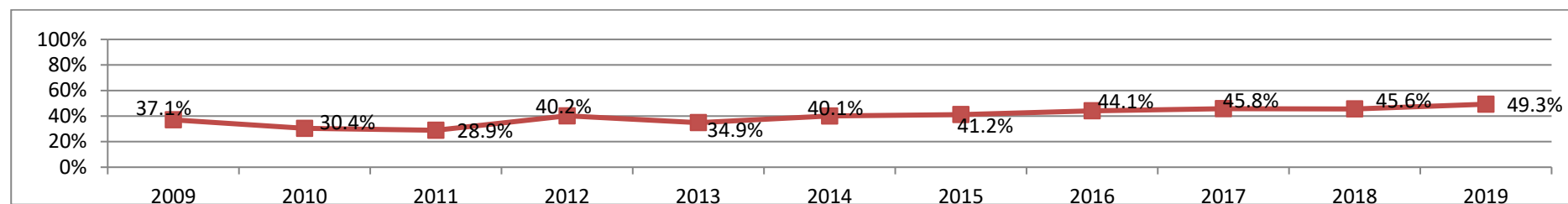
Source: Wales Omnibus survey 2009-2019

If cinema is excluded from the analysis, just over 8 in 10 (82.4%) of adults attended an arts event at least once a year in 2019. This is a slight increase on the previous year when 79.6% of adults attended.

Participation in Arts Activities

Almost half of all adults (49.3%), participated in arts activities once a year or more in 2019, this is a 3.7 percentage point increase from 2018 and the highest levels of participation over the ten-year period.

Levels of participation in the Arts 2009-2019 (% taking part in any activity once a year or more)



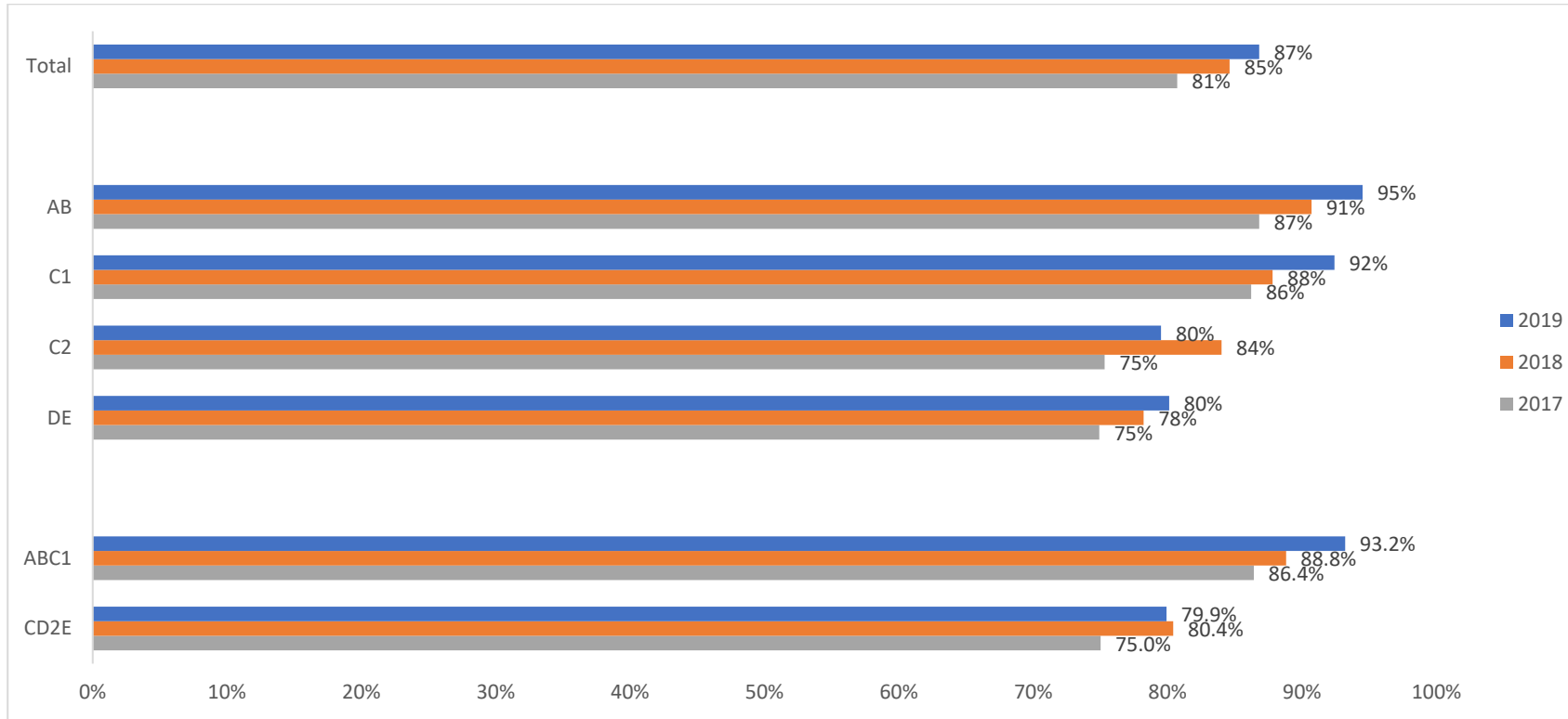
Base: All Adults (at least 1,000 per wave)

Source: Wales Omnibus survey 2009-2019

Attendance and Participation by Social Grade

Attendance by Social Grade

Arts Attendance by Social Grade (% attending once a year or more)



Base: All adults (2017:1,021, 2018&2019:1,002)

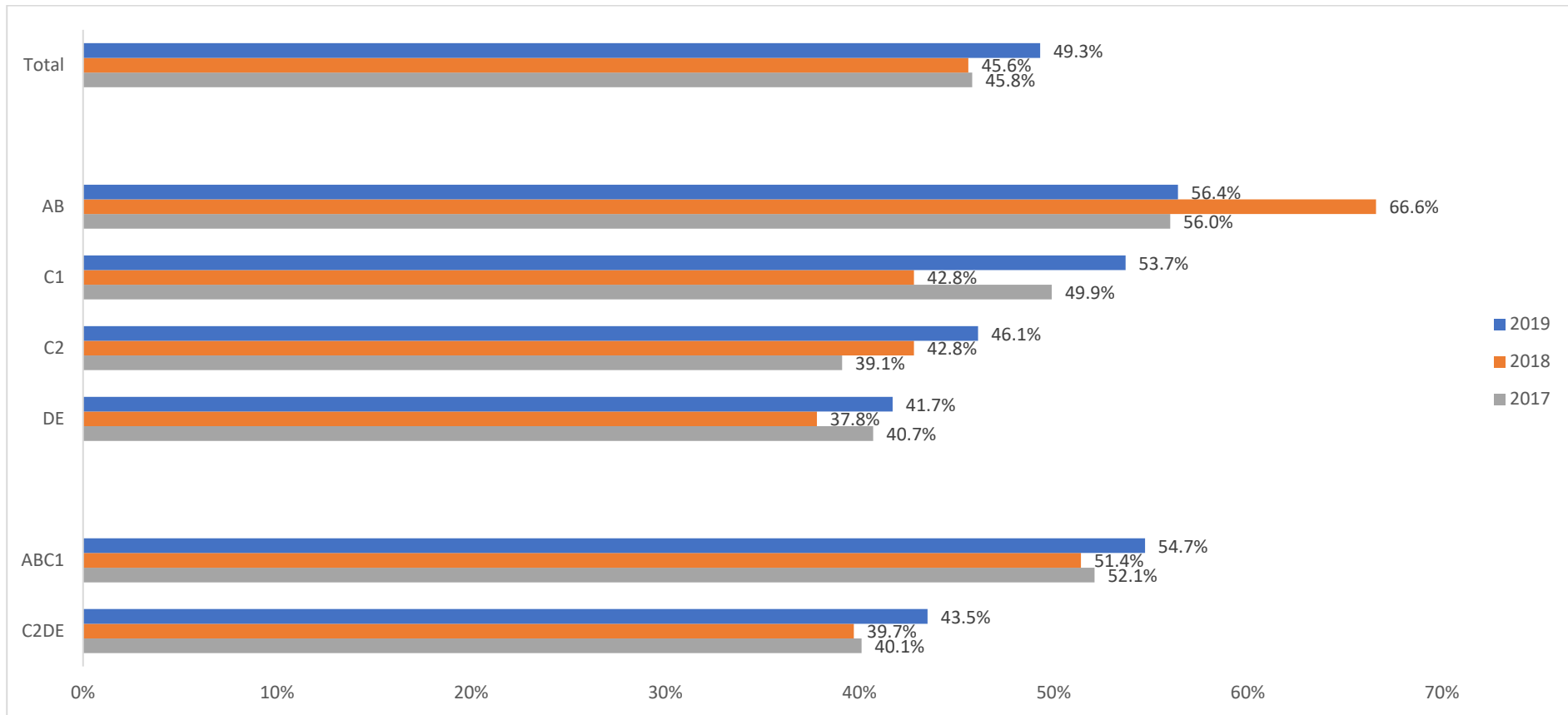
Source Wales Omnibus Survey 2017-2019

There continues to appear to be a correlation between socio economic grade and levels of attendance to the arts in Wales with 93.2% of adults from the higher social grades, the ABC1 group, attending an arts event at least once a year in Wales and 8 in 10 (79.9%) attending from the C2DE group. There has been an increase in attendance among the ABC1 group of 6.8 percentage points from 2018 while the C2DE group has remained at the same level in both years.

Participation in the Arts by Social Grade

As with attendance to arts events, participation in the arts during 2019 was higher among the ABC1 socio economic group, with just over half of adults (54.7%) taking part once a year or more. This compares to a below average participation rate of 43.5% of those in the C2DE group, this is a difference of 11.2 percentage points, a very similar gap to the previous year.

Arts Participation by Socio Economic Grade (% taking part in any artistic activity once a year or more often)



Base: All adults (2017:1,021, 2018&2019:1,002)

Source Wales Omnibus Survey 2017-2019

Attendance and Participation in the Arts by Age

Attendance to the Arts by Age

As with previous years, there were higher levels of attendance to arts events among the younger age groups, with 94.2% of 16-24 year olds attending at least once a year compared to 75.9% of the over 65s. However, despite having the lowest levels of attendance there has been a 7.5 percentage point increase among the 65+ age group since 2017.

Table 1: Attendance to Arts Events by Age

	2019	2018	2017
16-24	94.2%	92.7%	96.5%
25-34	92.6%	90.1%	86.8%
35-44	93.2%	89.6%	83.0%
45-64	86.7%	87.8%	80.9%
65+	75.9%	70.5%	68.4%
Total	86.8%	84.6%	80.7%

Base: All adults (2017:1,021, 2018&2019:1,002)

Source Wales Omnibus Survey 2017-2019

Participation in the Arts by Age

In 2019 participation in arts activities in Wales was broadly similar across all age groups. While the highest attendance levels were among the younger age groups with half of both the 16-24 and 25-34 age groups taking part in arts activities at least once a year. Lowest levels were among the oldest age group of 65+ at 47.6%, this was 4.3 percentage points lower than the 16-24 year olds. While the pattern of participation has not changed greatly among the younger age groups from the previous year, the 35-44 and 45-64 age groups have both experienced increases in participation levels. The 35-44 year age group have increased by 7.9 percentage points since 2018 and the 45-64 year age group have increased by 8.2 percentage points.

Table 2: Participation to Arts Activities by Age

	2019	2018	2017
16-24	51.9	57.2	61.3
25-34	50.6	52.7	42.8
35-44	49.9	42.0	49.7
45-64	48.7	40.5	41.1
65+	47.6	43.7	44.6
Total	49.3	45.6	45.8

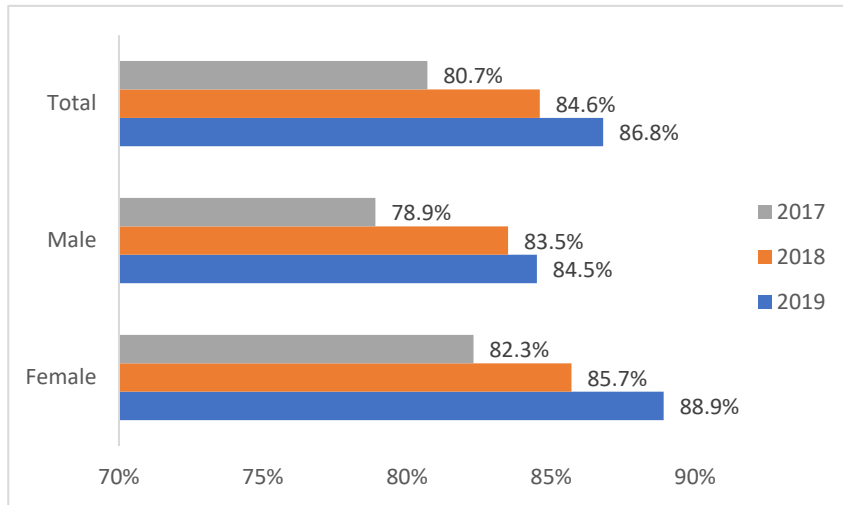
Base: All adults (2017:1,021, 2018&2019:1,002)

Source Wales Omnibus Survey 2017-2019

Attendance and Participation by Gender

Attendance to the Arts by Gender

Attendance to Arts Events by Gender (% attending once a year or more)

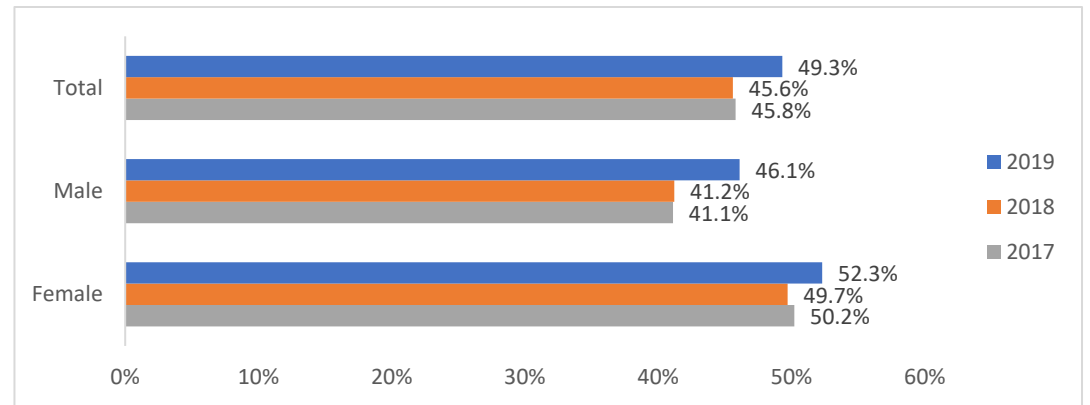


More women than men attended the arts once a year or more in 2019, 88.9% compared to 84.5% of men. Attendance among men has increased from 2017 by 5.6 percentage points, while attendance among women has increased by 6.6 percentage points.

Base: All adults (2017:1,021, 2018&2019:1,002)
Source Wales Omnibus Survey 2017-2019

Participation in the Arts by Gender

Participation in Arts Activities by Gender (% attending once a year more)



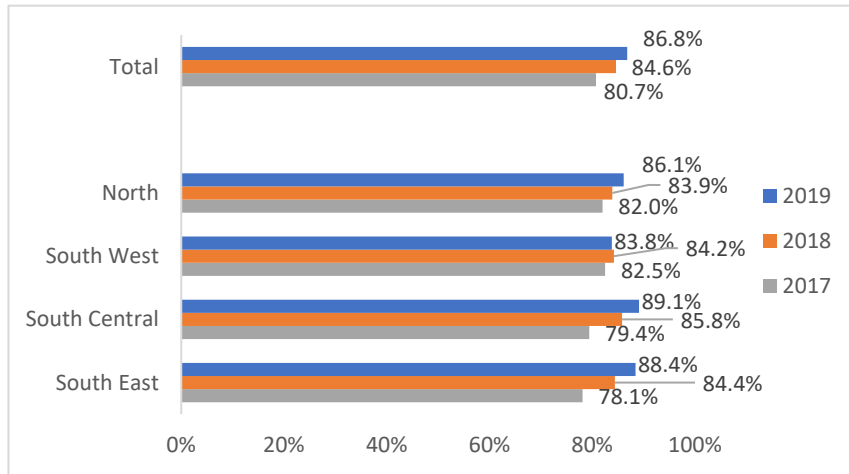
Base: All adults (2017:1,021, 2018&2019:1,002)
Source Wales Omnibus Survey 2017-2019

As with attendance there were higher levels of participation among women, 52.3% compared to men, 46.1%. This is a similar pattern to previous years, the difference between the two groups in 2019 was 6.2 percentage points. This has narrowed from the previous year when there was a gap of 8.5 percentage points between the two groups.

Attendance and Participation by Arts Council of Wales Region

Attendance to the Arts by Region

Arts Attendance by Arts Council of Wales Region (% attending any artform once a year or more)



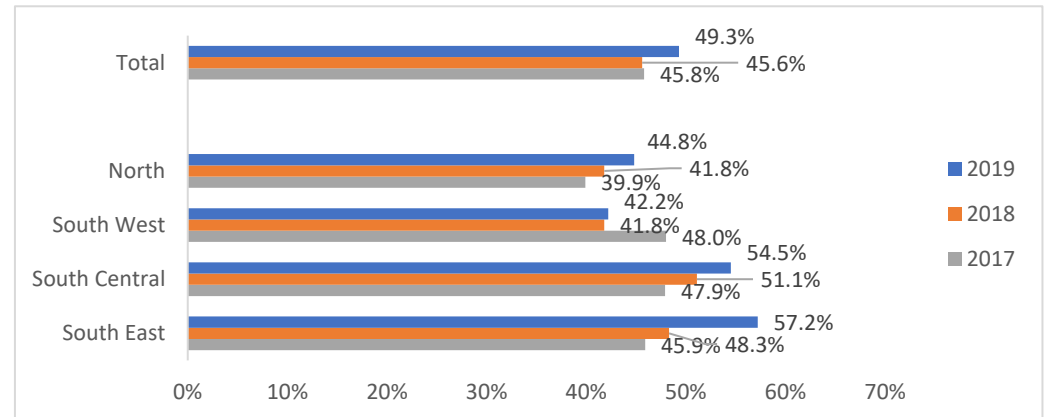
In 2019, the South Central region had the highest levels of attendance with almost 9 in 10 adults (89.1%) attending an arts event once a year or more. Lowest levels were in the South West region where 83.8% attended arts events. The South Central region also had the highest levels of attendance in 2018 at 85.8%, while lowest levels were in the North region at 83.9%

Participation in the Arts by Region

Participation in arts activities by Arts Council of Wales Region (% taking part once a year or more)

Base: All adults (2017:1,021, 2018&2019:1,002)
Source Wales Omnibus Survey 2017-2019

There were above average levels of participation in both the South East region, 57.2%, and the South Central region, 54.5% during 2019. The South East region also had the highest level of activity during the year. This pattern has changed from the previous year where it was the South Central region with the highest levels of arts participation at 51.1%, followed by the South East region at 48.3%.



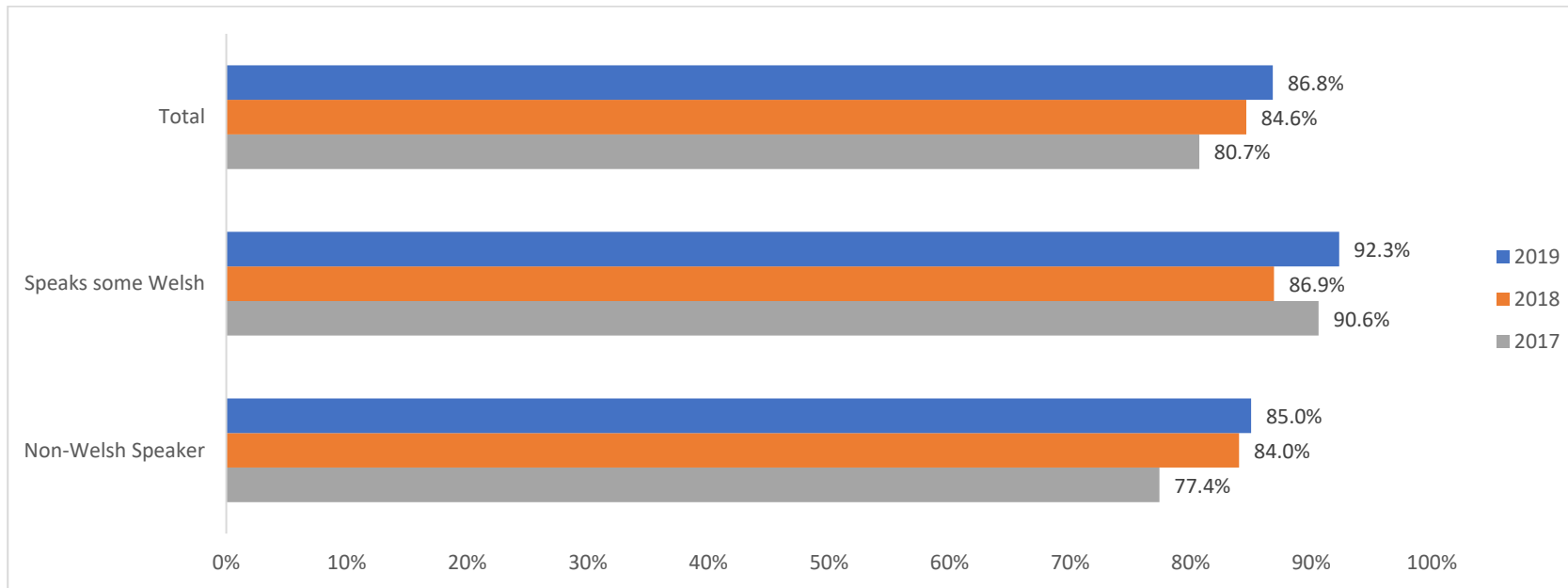
Base: All adults (2017:1,021, 2018&2019:1,002)
Source Wales Omnibus Survey 2017-2019

Attendance to and Participation in the Arts by Welsh Language

Attendance to the Arts by Welsh Language

There has been an increase in levels of attendance to arts events among those who speak welsh, rising from 86.9% in 2018 to 92.3% in 2019. This compares to a 1 percentage point increase among non welsh speakers, with 85% attending in 2019.

Arts Attendance by Welsh Language (% attending any artform once a year or more)



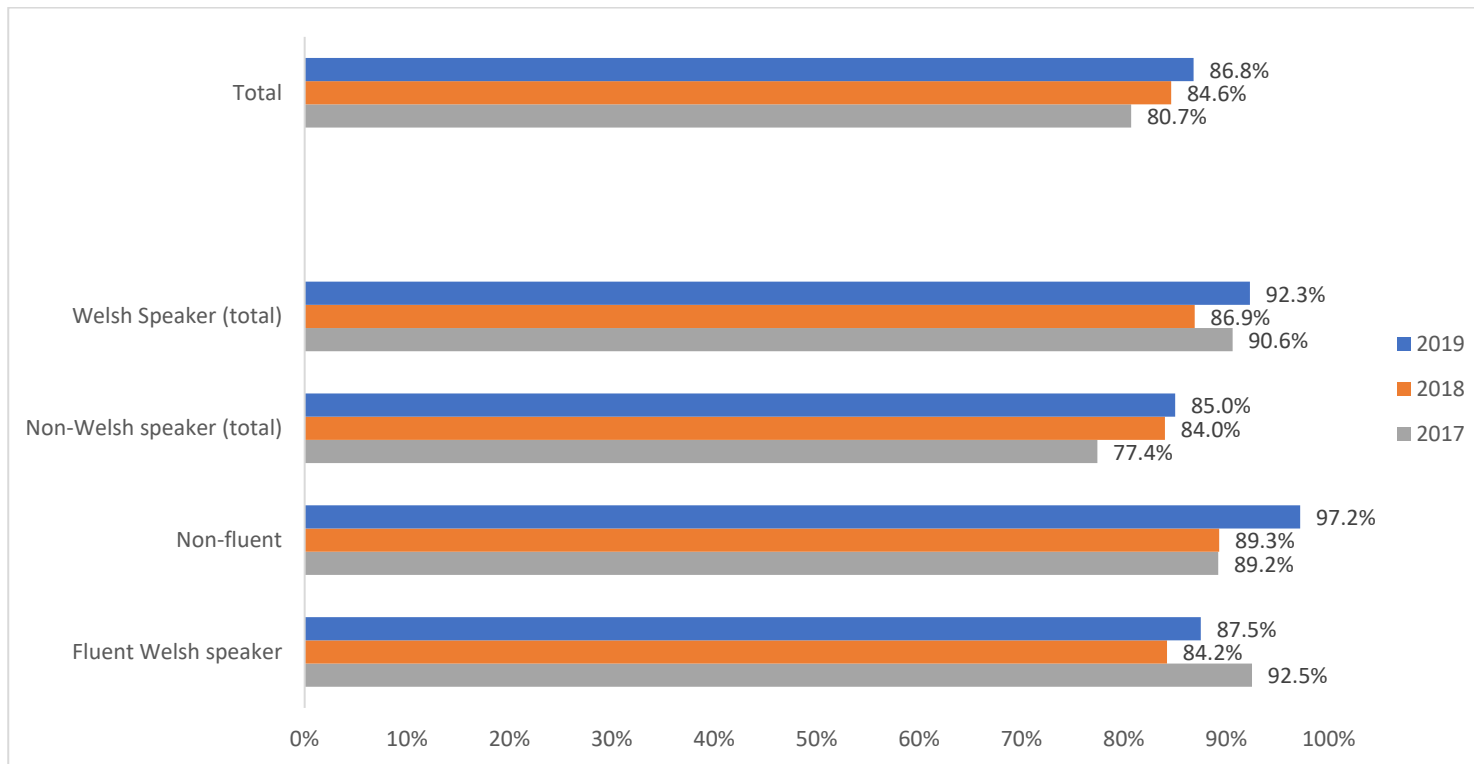
Base: All adults (2017:1,021, 2018&2019:1,002)

Source Wales Omnibus Survey 2017-2019

Further breakdown of Welsh Language and Attendance

Examining the Welsh language data in a little more detail it shows there had been an increase of 7.9 percentage points among non fluent Welsh speakers between 2018 and 2019, to 97.2% of this group attending arts events once a year or more. This compares to a 3.3 percentage point increase among the fluent Welsh speakers in the same period.

Further breakdown of arts attendance by welsh language ability (% attending once a year or more)



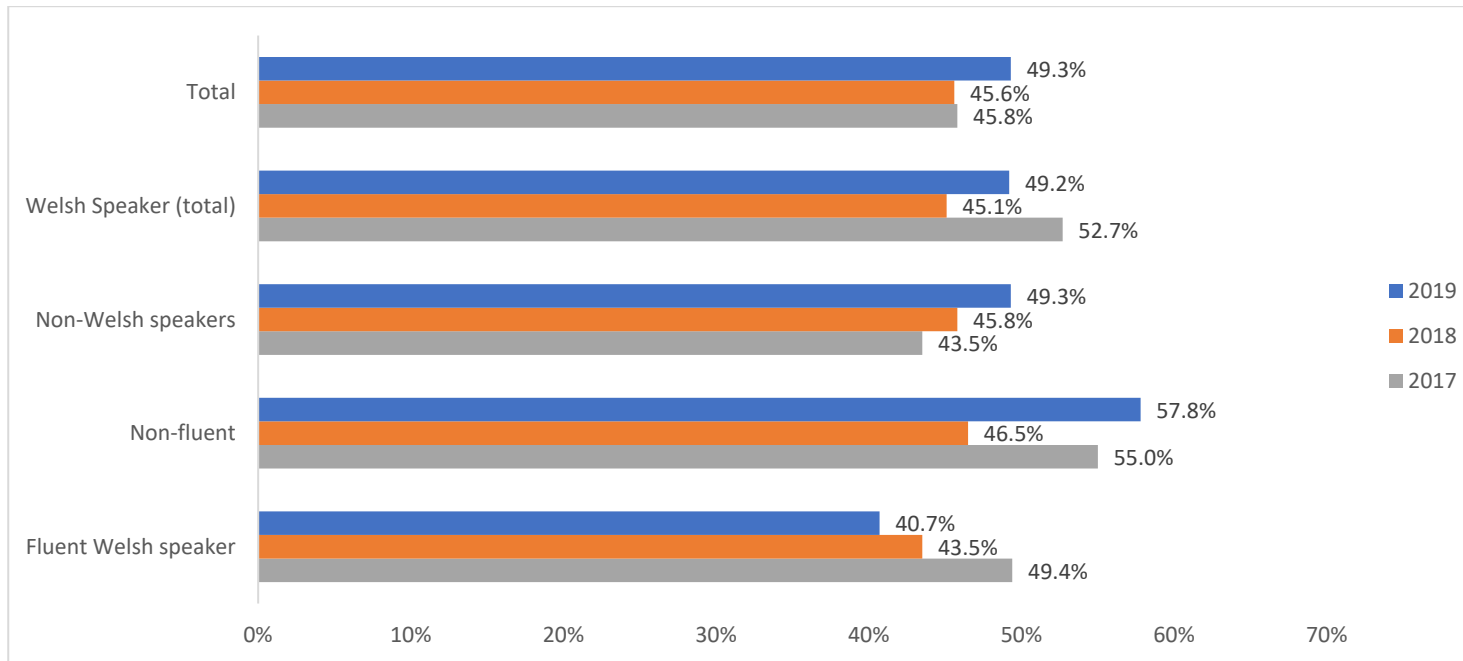
Base: All adults (2017:1,021, 2018&2019:1,002)

Source Wales Omnibus Survey 2017-2019

Participation in the Arts by Welsh Language

There is no difference in levels of participation in the arts and whether someone can speak Welsh, with 49% of both groups taking part in an activity at least once a year. When looking at the Welsh speakers in more detail it can be seen that there is a higher proportion taking part in arts activities among the non fluent speakers, 57.8% compared to the fluent Welsh speakers, 40.7%. There has been a rise of 11.3 percentage points in activity levels among the non fluent Welsh speakers.

Further breakdown of arts attendance by welsh language ability (% attending once a year or more)



Base: All adults (2017:1,021, 2018&2019:1,002)

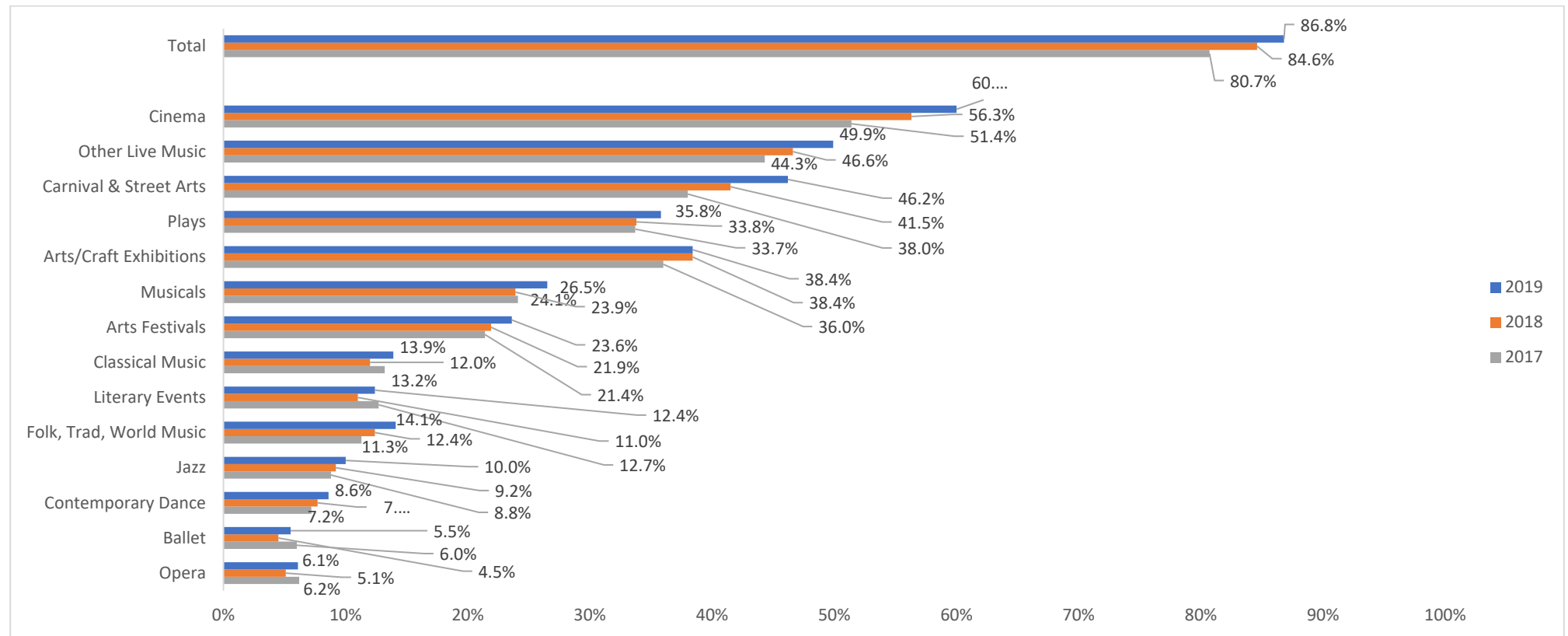
Source Wales Omnibus Survey 2017-2019

Attendance by Artform: Overview

The most frequently attended artform during 2019 was cinema with 6 in 10 adults attending once a year or more. This has increased by 8.6 percentage points since 2017. Half, 49.9%, of adults attended live music events in 2019, and 46.2% attended carnival and street arts once a year or more. These were the three most frequently attended artforms during the year.

Artforms with the lowest levels of attendance continued to be ballet and opera with 5.5% and 6.1% of adults attending these once a year or more, very similar levels to the two previous years.

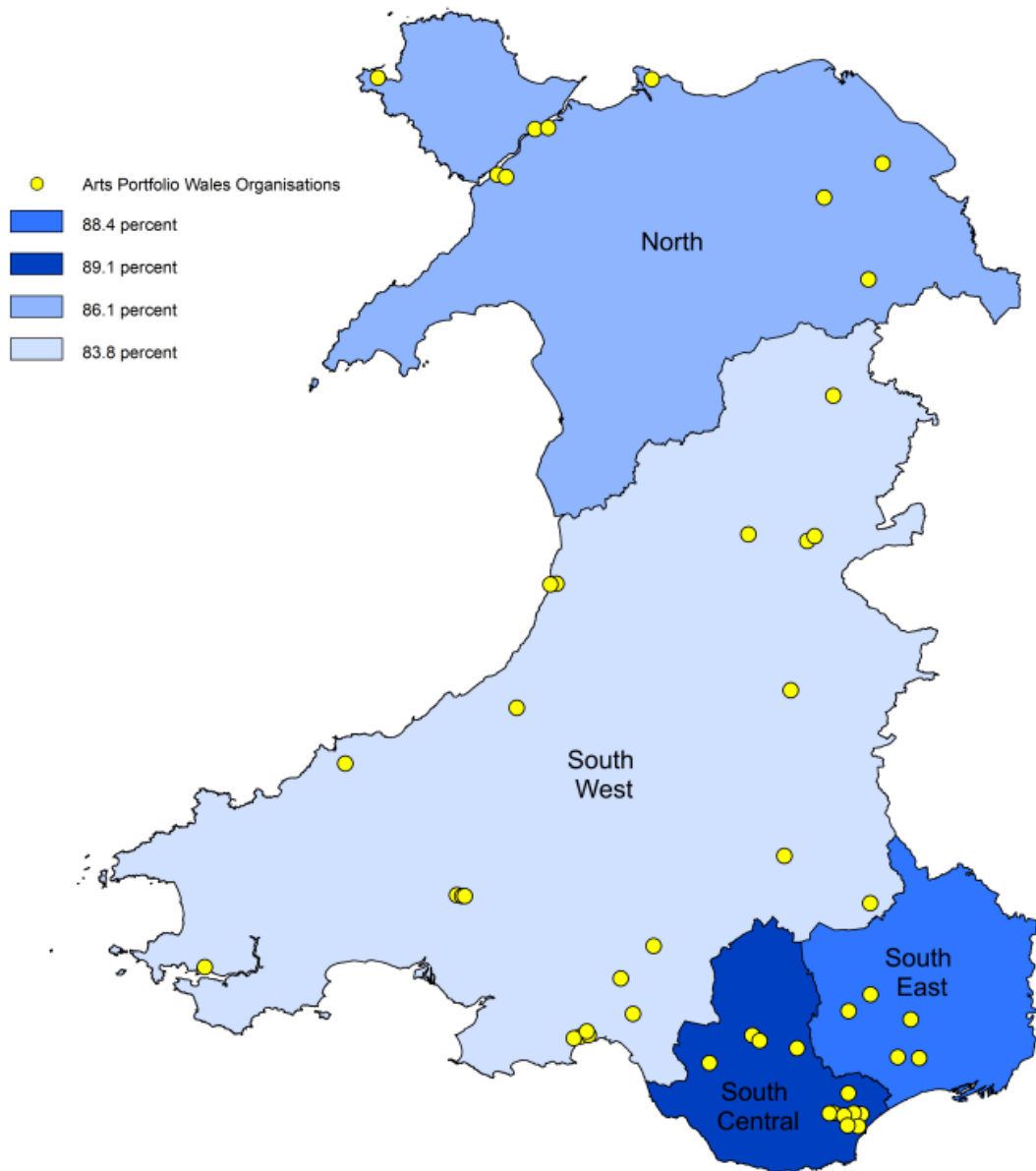
Arts Attendance by Artform (% attending each artform once a year or more)



Base: All adults (2017:1,021, 2018&2019:1,002)

Source Wales Omnibus Survey 2017-2019

Attendance at Arts events by Adults in 2019 (% attending once a year or more)



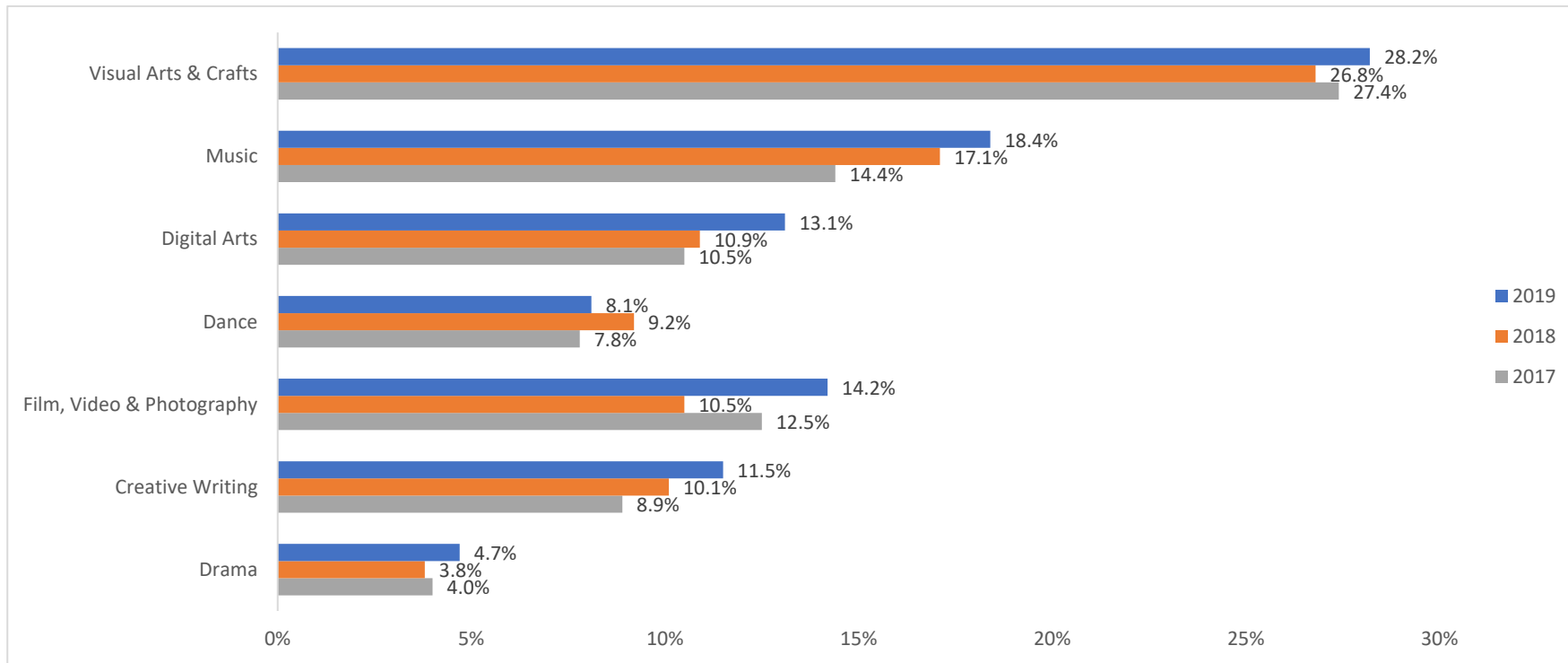
Arts Council of Wales, Research Team. May 2020.

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Participation by Artform: Overview

Visual arts and crafts were the most popular activity for adults to take part in in Wales during 2019, with almost 3 in 10 (28.7%) doing so once a year or more. This has remained the most popular activity to participate in across the three-year period. Drama continued to be the least frequently participated in activity with 4% taking part each year since 2017. Music, digital arts and creative writing are the three artforms which have experienced year on year increases.

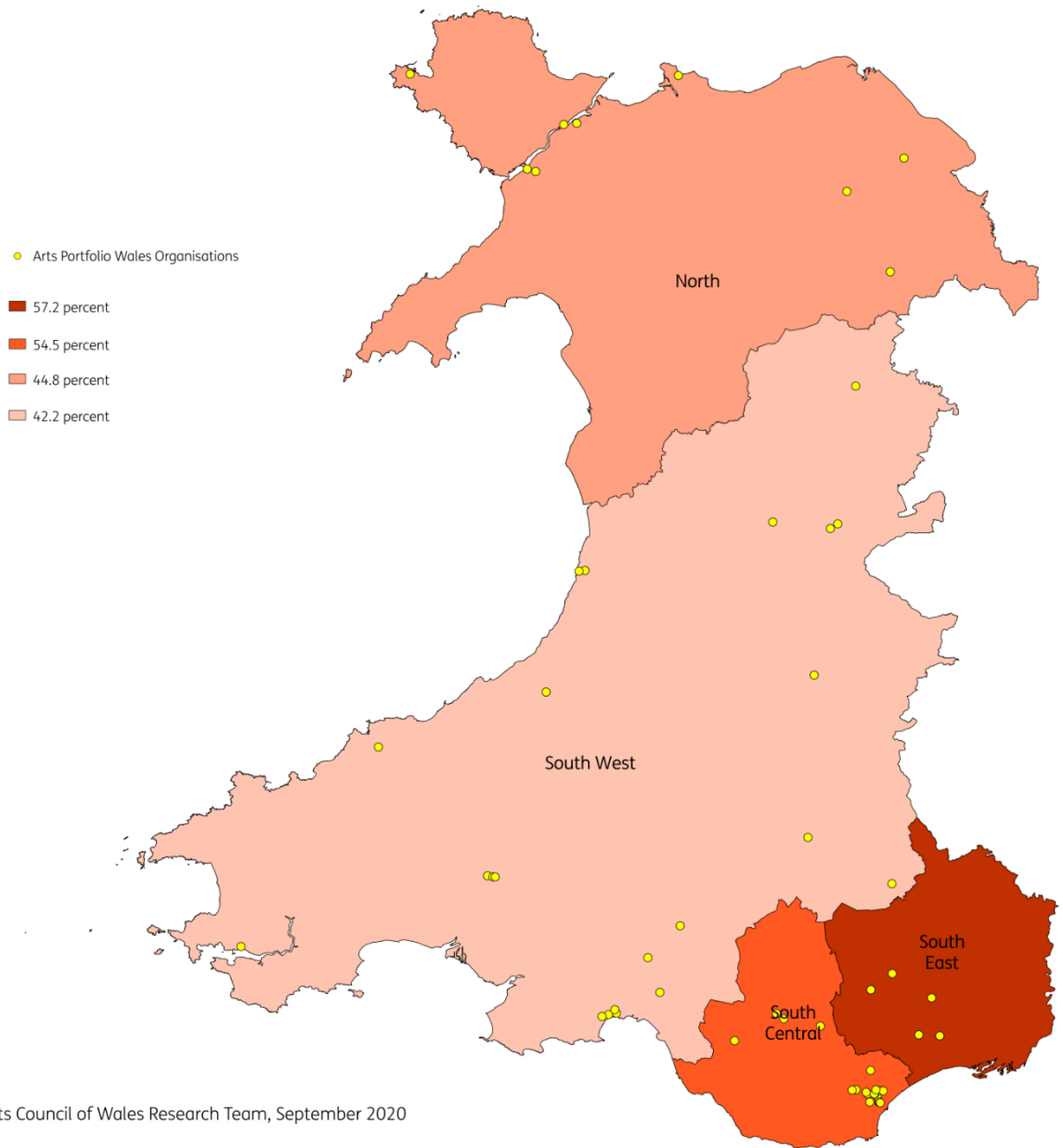
Participation in the Arts by Artform (% taking part once a year or more)



Base: All adults (2017:1,021, 2018&2019:1,002)

Source Wales Omnibus Survey 2017-2019

Participation in Arts Activities by Adults in 2019 (% taking part once a year or more)



Arts Council of Wales Research Team, September 2020

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Appendix 1 - Social Grade Definitions

The population can be divided into six socio-economic groups or social grades, which are based on the occupation of the Chief Income Earner in the household. Everyone in the household has the same social grade as the Chief Income Earner. To aid analysis, the first three grades and the last three grades are often grouped together into ABC1s and C2DEs which are seen as equating to the 'Middle Classes' and the 'Working Classes':

- A "Upper Middle Class" - Higher managerial, administrative, professional e.g. Chief Executive, Company Director, Senior Civil Servant, Doctor, Judge, Barrister, Executive Accountant
- B "Middle Class" - Senior and intermediate managerial, administrative, professional e.g. Secondary School Teacher, Librarian, Computer Programmer, Probation Officer, Social Worker
- C1 "Lower Middle Class" - Supervisory, clerical, junior managerial e.g. Clerical/Office Workers, Shop Floor Supervisor, Bank Clerk, Sales Person, Student

ABC1s –
professional,
qualified and
non-manual
occupations

- C2 "Skilled Working Class" - Skilled manual workers e.g. Electrician, Carpenter, Fire Fighter, Foreman
- D "Working Class" - Semi-skilled and unskilled manual workers e.g. Shop Worker, Assembly Line Worker, Refuse Collector, Messenger, Bar Staff
- E Those wholly reliant on state benefits including the long-term unemployed and pensioners without private pensions. Casual labourers

C2DEs –
skilled, semi-skilled
and unskilled
manual workers
and non-working
people

Appendix 2 – 2019 Survey Questionnaire

SHOW CARD

Q1 About how often these days do you go to, or do, each of the things I will now read out?

Please use the card to help you answer.

READ OUT

..... Go to a Cinema to see a film?

Once a week or more often

2 \ 3 times a month

Once a month

Once every 2 \ 3 months

2 \ 3 times a year

Once a year

Less often

Never

DK

Repeat for :

Musicals (not opera)

Opera

Ballet

Contemporary Dance performances

Plays

Classical Music Concerts or Recitals

Jazz concerts or performances

Folk, traditional or world music

Other Live Music

Art or craft galleries or exhibitions

Readings, storytelling and other literary events

Carnivals and street arts

Arts Festivals, e.g. music, drama, literature, etc

SHOW CARD A AGAIN

Q2 About how often these days, if at all, do you take part yourself in your leisure time in any of the activities I am going to read out?

By 'take part' I mean in the home, in classes, rehearsals, shows or in workshops, other than as part of your job or full time education.

READ OUT

...Music of any kind including playing an instrument, singing, helping out in a choir, operatic society, brass band, orchestra, folk, rock or jazz group.

Once a week or more often

2 \ 3 times a month

Once a month

Once every 2 \ 3 months

2 \ 3 times a year

Once a year

Less often

Never

DK

Repeat for:

Drama or theatrical activity

Dance activity of any kind

Film and video making or photography other than family, holiday or party snaps.

VISUAL ARTS AND CRAFTS, for example painting, sketching, computer graphics, pottery, wood-turning, jewellery making, weaving, textiles, knitting or sewing.

CREATIVE WRITING, for example poetry or stories.

DIGITAL ARTS: creating and making arts using digital technology e.g. uploading, creating or remixing arts related content (e.g. on YouTube, Flickr, etc.)