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Arts in Wales Survey 2015

Preamble for Official Statistics Release

Arts Council of Wales is the official funding and development organisation for the arts in Wales. As such, we are committed to fostering an environment in which the arts can flourish in our country, and play a central role in everyday life. In order to monitor these strategic objectives, it is vitally important that we have our finger on the pulse across Wales. As part of our commitment we need to understand levels of engagement in the arts across the country. In order to do this, we manage an extensive programme of research.

The Arts in Wales survey helps us not only to monitor overall public engagement but also understand how engagement levels differ according to factors like age, geography, and ethnicity. As well as this, the survey allows us to get to grips with people's attitudes towards the arts, and gives us an insight into the reasons why people might not attend or take part in the arts (at all, or more than they currently do).

'Arts in Wales 2015' is the third wave of this survey, with previous iterations having been undertaken in 2005 and 2010. The survey asked questions of some 4,000 respondents in 2015, and their responses help us to understand the picture in Wales as a whole.

Research Report

Arts in Wales 2015



Prepared for:
Arts Council of Wales

Prepared by:
Beaufort Research



Cyngor Celfyddydau Cymru
Arts Council of Wales

Contact Details

Agency contacts: Chris Timmins, Owen Knight

Project: B01515

Date: June 2016

Beaufort Research

2 Museum Place
Cardiff
CF10 3BG

Tel: (029) 2037 8565

Fax: (029) 2037 0600

E-mail: enquiries@beaufortresearch.co.uk

www.beaufortresearch.co.uk

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1. Executive summary

Overview

- The Arts Council of Wales investigates public engagement with and attitudes towards the arts in Wales through large scale survey research which has been carried out on a five year cycle. The research is used to inform priorities for funding and strategy development, to help evaluate the work of the council and to monitor the impact and value of the arts in Wales.
- In 2015 the third such 'Arts in Wales' survey was commissioned, involving in excess of 4,000 interviews with adults resident in Wales. Fieldwork was undertaken across three periods¹ to mitigate any seasonal variation in the data and to maintain comparability with data captured as part of the 2005 and 2010 Arts in Wales surveys.

Attitudes to the arts in Wales

- In 2015, there remained strong support for the public funding of arts and cultural projects. In particular there was almost consensus that all children should have the opportunity to learn to play a musical instrument or participate in other arts activities in school, and more than eight in ten were of the belief that it is right that there should be public funding of the arts in Wales (one in twenty disagreed).
- There was widespread agreement (approximately eight in ten) that arts and culture make Wales a more interesting and vibrant place to live in and that people would lose something of value if arts and cultural activities were lost. These societal benefits were acknowledged even by those who have less personal engagement in the arts.
- Overall proportions supportive of arts provision in schools, public funding of the arts, and of the belief that without arts and cultural activities they would lose something of value are relatively unchanged (overall agreement with statements relating to these dimensions differed by no more than three percentage points since 2010). However, strength of feeling among those supportive has grown (more 'strongly agreeing' with these statements than in 2010), possibly reflecting that some feel the arts increasingly under threat.
- Positive perceptions also existed in terms of the benefits of the arts in gaining employment, its contribution to enriching survey participants' own lives, and the personal inspiration and enjoyment derived from artistic activity – Most were in agreement (and at least twice as many as disagreed) that these benefits existed.
- Value for money was also rated positively - six in ten (63%) of those attending or participating in the arts felt that the arts activity attended or participated in represented good value for money.

¹ 2015 Arts in Wales Survey fieldwork was largely undertaken in June 2015, September 2015 and January 2016

- Following successive funding cuts in recent years and with funding levels continuing to be under scrutiny, these strong and strengthening levels of support and appreciation of the arts can provide powerful advocacy messages.

Overall engagement with the arts

- Given these economic and financial challenges, it might also be considered encouraging that only a slight overall decline in attendance and a small increase in overall participation has been recorded:
 - Around three-quarters (73%) of Welsh adults had attended at least one arts activity 2 to 3 times a year or more often - a similar level to 2010 (76%). Excluding cinema, attendance reduces to 58% - again comparable with 2010 (60%).
 - In terms of participation, two-fifths (41%) of the adult population participated in at least one arts activity 2 to 3 times a year or more often, again, similar, but slightly higher than 2010 (37%).

Arts attendance

- Cinema was the most commonly attended art form (54% attended 2 to 3 times a year or more often), followed by live music (33%), and art or craft galleries or exhibitions (25%).
- More than one in ten had attended (or participated in) a Welsh language arts event in the last year, two fifths of whom were *not* Welsh speakers - perhaps reflecting the role of Welsh speaking partners and children in attracting non Welsh speakers to Welsh language events.
- Attendance at most individual art forms varied little from 2010. The most notable declines being recorded for musicals (a three percentage point drop to 12% attending 2 to 3 times a year or more often, as was recorded in 2005).
- The majority (almost two thirds) of those attending arts events did so locally on the last occasion – either within their own local neighbourhood or within their own Local Authority. Of the remainder who last attended an arts event beyond their own local Authority, only those in North Wales (and particularly those in the North East) were more likely to have attended outside Wales than in the rest of Wales.
- Reasons for attendance focused primarily on general entertainment or the social aspect of events, a desire to see a specific show/event/performer/artist/company, or a particular interest in the art form more generally. Children were more likely to be a motivating factor in attending the circus, pantomime and readings/other literary events.

Participation in the arts

- All but one of the individual art forms contributed to the small overall increase in participation, including film and video making and visual arts and crafts in particular. Dance was the only activity where participation had fallen.
- Participation remained highest in visual arts and crafts (for example painting, sculpting, pottery, wood-turning, jewellery making weaving or textiles) and music of any kind (in including playing an instrument, singing, helping out in a choir, operatic society, brass band, orchestra, folk, rock or jazz group) – 20% and 15% respectively participating in these art forms at least 2 to 3 times a year or more often.
- Participation in the arts tended to be more localised than arts attendance – More than half of most recent arts participation took place at home and almost a quarter took place within the local neighbourhood. This localised pattern of participation was evident for all individual art forms - more than half of all individual art form participation either took place at home or within the local neighbourhood.
- There were numerous motivations for taking part in the arts and, beyond the sheer pleasure and enjoyment gained from all arts activity, different art forms appeared to fulfil different needs. Most notably:
 - Dance activity improving quality of life / wellbeing.
 - The social aspect of friends taking part, being particularly appealing to drama and theatrical activity participants.
 - Learning new skills being a particular motivation for digital arts participants.

Variations in attendance and participation

- Arts attendance and participation both varied most considerably by educational attainment (those with lower or no educational qualifications less likely to attend) and social grade (lower social grades less likely to attend). There was also a smaller difference by area with Communities First areas less likely to attend than non-Communities First areas.
- Comparing attendance and participation (2 to 3 times a year or more often) among those from different social grades reveals that although the disparity in attendance among the highest and lowest social grades has remained relatively unchanged since 2010, the gap between these groups in terms of participation has widened. This suggests there is more to do in relation to this social inclusion agenda, but is perhaps not surprising during a challenging period of austerity.
- Moreover, these societal differences in attendance and participation are not unique to the arts - This study revealed similar differences occurring for attendance at other leisure activities (including spectating at sports events, visiting tourist or historic attractions and going on outings to the countryside/seaside), and other participatory leisure activities (including volunteering, gardening, sports participation, DIY, going out for a drink or meal and going on day trips).

- Attendance among those from BAME and Eastern European groups was encouragingly similar to the overall population average – Indeed those from BAME and Eastern European groups were six percentage points more likely to attend at least one arts event in the last year than the overall population in Wales (79% doing so, compared with 73% overall), while participation in at least one arts activity on the same frequency was just three percentage points lower at 38% (in comparison with 41% overall).

Barriers to arts engagement

- Time, cost, family commitments, local availability and lack of arts activities of interest, as well as the arts generally lacking of appeal were the main barriers to (increased) attendance/participation.
- Being time-poor was more likely to be a barrier for those from higher socio-economic grades, while cost, health and a general lack of interest were more likely to be barriers for those from lower DE social grades.
- Addressing these barriers is challenging (particularly in relation to cost at a time when disposable income is under pressure). However promotion of relevant events and activities and giving prominence to key aspects which address these perceived barriers to participation could increase engagement among hard to reach groups, including:
 - Promotion of local of events/activities of an easily accessible nature (reflecting the predominantly local nature of current attendance and participation), including highlighting that much arts participation is currently undertaken in home (at participants own leisure) or within local communities.
 - Specifically targeting demographic groups with events and activities more likely to appeal (based on current activities appealing to the same demographic).
 - Highlighting the fact that many arts activities and events are inexpensive and/or free.
- There might also be value emphasising some of the reasons for participation in marketing strategies and materials, such as learning new skills (particularly relevant to digital arts), improving confidence (e.g. in drama/theatrical activity), fulfilling a sense of community and social aspects (e.g. music and drama), activity/health/wellbeing benefits (e.g. dance, circus skills, street arts etc.) and developing creativity. This could also be extended to wider benefits of developing some of these skills which lead to improved job prospects.

2. Introduction

2.1 Background and objectives

The Arts Council of Wales is the official funding and development organisation for the arts in Wales. Its vision is of a creative Wales where the arts are central to the life of the nation, which it strives to achieve by fostering an environment in which the arts are able to flourish, through support and promotion of the important role the arts play in Wales.

In order to inform priorities for funding and strategy development, to help evaluate the work of the Council and to demonstrate the impact and value of arts in Wales, the Arts Council of Wales requires a statistically reliable picture of public engagement with and attitudes towards the arts in Wales.

Information from the public has been gained in the past via large scale population surveys (Arts in Wales) on a five year cycle, last undertaken in 2005 and 2010, each involving around 7,000 interviews. As such, in 2015, the Council commissioned Beaufort Research to undertake a further large scale 'Arts in Wales' population survey to provide an updated picture of arts engagement and attitudes to the arts, which allowed accurate comparison of key measures with previous surveys to evidence trends.

Specifically, the survey objectives were to collect information to:

- Establish levels of engagement in the arts in Wales across a variety of art form sectors
- Identify variance in engagement levels across key demographic groups
- Provide a social and geo-demographic profile of arts audiences (attenders and participants)
- Profile non-attenders/participants
- Assess trends in the overall levels of arts attendance and participation
- Review public perceptions of arts and cultural activity
- Investigate attitudes to public funding of the arts in Wales
- Consider competing leisure interests to arts and culture

2.2 Research methodology

Overall design

Maintaining consistency with the previous Arts in Wales studies undertaken in 2005 and 2010, the survey consisted of face to face interviews with a sample designed to be demographically representative of the adult population resident in Wales aged 16 and over.

A total of 4,275 interviews were undertaken, including a 258 boost interviews with Black, Asian, and minority ethnic groups (including Eastern Europeans) to enable separate analysis of this group. In order to deliver the 2015 survey within the available budget, unlike previous Arts in Wales surveys there was no longer a requirement for the survey data to be reported at an individual local authority level, meaning somewhat fewer interviews were required than in the past².

Sampling approach

The sampling approach combined random location sampling and setting of quotas on key demographic variables.

The primary sampling unit used for selection of geographical locations for this survey was Lower Layer Super Output Areas (LSOAs). A disproportionate approach to selecting sampling locations was adopted, to achieve an equal number of interviews (c. 1,000) in each of the four Arts Council of Wales regions. Within each Arts Council region, the number of sampling locations required in each local authority was identified, based on local authority population size and having taken into account a minimum criterion of 120 interviews in any individual local authority. The required number of LSOAs within each local authority was then selected at random after stratification by LSOA population size (based on latest 2011 Census data), to give a larger LSOA a greater chance of selection than a smaller one. Figure 1 (page 9), summarises the distribution of interviews by Arts Council region and local authority.

Within each sampling point, interlocking demographic quota controls of age within gender as well as social class and working status were set, again based on latest 2011 Census data, to reflect the individual demographic profile of each selected point.

Black, Asian and Minority Ethnic Sample (including Eastern European)

To enable robust analysis of members of the Black, Asian and Minority Ethnic (BAME) and Eastern European population³ additional 258 ‘boost’ interviews were undertaken with this group. Combining the boost sample with those interviewed as part of the main sample selection (161), provided a total sample of 419 interviews for analysis.

² The 2005 and 2010 Arts in Wales surveys consisted of a total of 6,851 and 7,083 interviews respectively.

³ Defined as: ‘Black / African / Caribbean / Black British’, ‘Asian / Asian British’, ‘Mixed / multiple ethnic groups’, ‘White: Other White’ and ‘Other ethnic groups’ based on Census 2011 definitions.

Boost interviewing locations were selected to achieve a regional/LA distribution broadly in line with the BAME population and within each selected location interviewing quotas were set on ethnic group to reflect the distribution of BAME groups. Figure 2 (page 10), summarises the distribution of interviews by ethnic group.

Operational Methodology

Interviewing was conducted face to face in the homes of respondents utilising CAPI (Computer Aided Personal Interviewing) on tablet/handheld laptop computers. Postal and telephone back-checking was undertaken in accordance with ISO 20252 (the dedicated international quality standard for the Market Research industry).

To maintain comparability on core survey measures, the questionnaire was largely based on that of the 2010 Arts in Wales survey. To keep within the budget available for the survey, interview length was limited to approximately 10 to 15 minutes on average, focusing on core survey measures. The full questionnaire can be found in the appendix (page 69).

Again, to maintain consistency with the previous survey approach, and to mitigate any seasonal variation in arts attendance and participation, fieldwork was undertaken across three periods in 2015/16:

- 25 May to 7 July 2015
- 1 September to 14 October 2015
- 2 January to 16 February 2016

Data Weighting

To correct for the oversampling of certain regions/unitary authorities and to fine tune any demographic profiles, the final data was weighted to be representative of the population in Wales (based on Census 2011 data). This involved interlocking weighting targets based on age within gender within local authority, and social grade within Arts Council region.

To correct for the deliberate oversampling of the BAME population, further weighting was applied to reflect the ethnic group profile of the population in Wales.

Sample profile summaries

Figures 1, 2 and 3 below and overleaf summarise the achieved and weighted sample profiles by Arts Council region, local authority, ethnic group, gender, age, and social grade.

Figure 1: Sample profile by region

	Unweighted sample size	Weighted sample Size	Universe proportions (weighted sample proportion)
ACW North region	1,038	1,063	25%
Anglesey	122	98	2%
Conwy	171	163	4%
Denbighshire	135	131	3%
Flintshire	221	211	5%
Gwynedd	177	171	4%
Wrexham	212	187	4%
ACW South West region	1,063	1,261	29%
Carmarthenshire	187	258	6%
Ceredigion	147	111	3%
Neath Port Talbot	150	196	5%
Powys	137	188	4%
Pembrokeshire	158	171	4%
Swansea	284	337	8%
ACW South Central region	1,150	1,255	29%
Rhondda Cynon Taff	266	323	8%
Bridgend	166	193	5%
Cardiff	461	482	11%
Merthyr Tydfil	125	82	2%
Vale of Glamorgan	132	175	4%
ACW South East region	1,024	798	19%
Blaenau Gwent	138	98	2%
Caerphilly	296	247	6%
Monmouthshire	171	129	3%
Newport	273	198	5%
Torfaen	146	126	3%
TOTAL	4,275	4,275	100%

Figure 2: Sample profile by ethnic group

	Unweighted sample size	Weighted sample Size	Universe proportions (weighted sample proportion)
Ethnic Group			
White (British Isles)	3,856	4,008	93.8%
White: Other White	121	78	1.8%
Asian / Asian British	171	98	2.3%
Black / Black British	57	26	0.6%
Other ethnic group	37	21	0.5%
Mixed / multiple ethnic group	33	44	1.0%
TOTAL (ex. White, British Isles)	419	267	6.2%
TOTAL	4,275	4,275	100.0%

Figure 3: Sample profile by gender, age, and social grade

	Unweighted sample size	Weighted sample Size	Universe proportions (weighted sample proportion)
Gender			
Male	1,940	2,077	49%
Female	2,335	2,198	51%
Age			
16 to 34	1,401	1,253	29%
35 to 54	1,199	1,397	33%
55+	1,675	1,625	38%
Social grade⁴			
AB	673	770	18%
C1	1,308	1,239	29%
C2	814	822	19%
DE	1,458	1,422	33%
TOTAL	4,275	4,275	100%

⁴ AB (higher administrative or professional occupations), C1 (junior managers, owners of small establishments and other non-manual positions), C2 (skilled manual workers with a responsibility for other people), DE (semi-skilled and unskilled manual workers, casual workers and those dependent on state benefits)

Levels of accuracy

As with any survey, findings for the sample of respondents interviewed provide estimates of behaviour and opinion of the wider research universe (in this case the adult population of Wales). As the sample size increases, the more reliable the data becomes.

Thinking about this survey, there are particular issues around judging statistical significance. For confidence intervals to be placed around estimates, and for significance testing to take place, the assumption must be met that the sample represents a pure random sample of the relevant population. The Arts in Wales surveys are demographically representative surveys where respondents were recruited for interview based on meeting set demographic *quotas*, and so genuine statistical significance cannot be established. In order to report significance, we must therefore make the assumption that the survey was not a quota sample survey, i.e. we are referring to ‘pseudo-statistical significance’.

The figure below illustrates the reliability of individual results for different sample sizes and percentage results at the 95% confidence level. This means that, if the survey were of a pure random sample of the population, there would be only a 1 in 20 likelihood of the finding having occurred by chance. For example, thinking about the full 4,275 survey participants in 2015, if 50% said they had attended a particular arts event, we could say with 95% confidence that the true proportion attended this arts event lies between 48.5% and 51.5% (i.e. +/- 1.5%).

Statistical Reliability (at 95% confidence level)

Survey Result	Ranges at the 95% confidence level (excluding survey design factors)		
	50%	70% / 30%	90% / 10%
Sample size:			
4,275 (all survey participants)	+/- 1.5	+/- 1.4	+/- 0.9
1,000 (e.g. an Arts Council region)	+/- 3.1	+/- 2.8	+/- 1.9
445 (e.g. fluent Welsh speakers)	+/- 4.6	+/- 4.3	+/- 2.8

Similarly, when comparing results from different surveys or subgroups within the same sample, a difference must be of a certain magnitude before it is regarded as being statistically significant. The figure below is a guide to the level of difference required to establish a significant difference between the full 2010 and 2015 survey samples for various survey measure percentages (at the 95% confidence level).

Survey measure	Difference required for a change to be statistically significant
5% or 95%	+/- 0.8%
10% or 90%	+/- 1.1%
20% or 80%	+/- 1.5%
30% or 70%	+/- 1.7%
50%	+/- 1.9%

In general only changes in results which are statistically significant have been highlighted in the commentary of this report.

3. Attitudes to the arts in wales

A series of statements were presented to survey participants whom were asked to state their level of agreement with each one – from ‘agree strongly’ to ‘disagree strongly’.

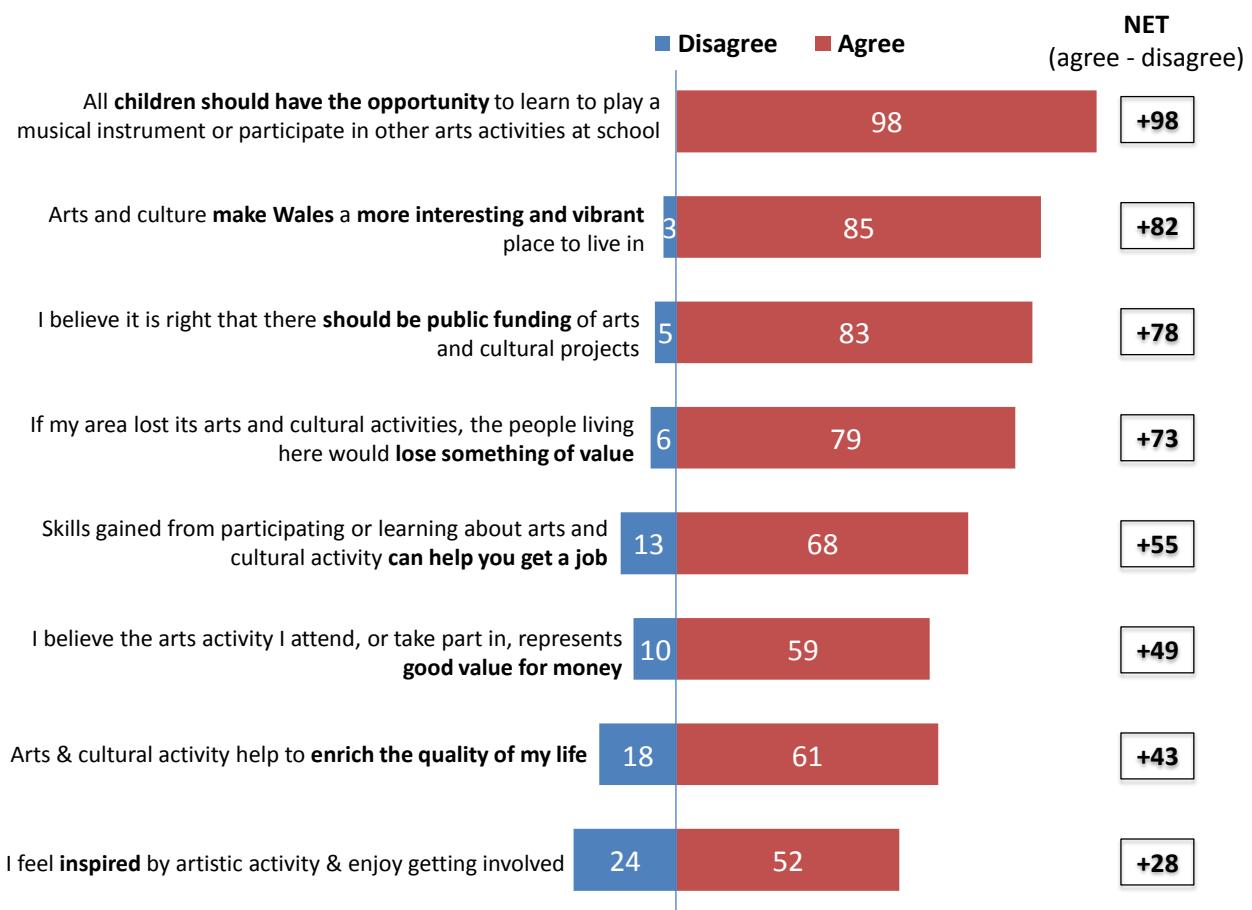
Figure 4 summarises the proportions agreeing (either stating they ‘agree strongly’ or ‘agree’) and disagreeing ('disagree strongly' or 'disagree') with each statement. A ‘net’ score has also been calculated to indicate the overall balance of agreement / disagreement with each statement by subtracting those who disagree from those who agree.

Overall, attitudes to the arts were positive – at least half of all participants agreed with each statement and almost all (98%) agreed that all children should have the opportunity to learn to play a musical instrument or participate in other arts activities at school.

Similarly high proportions agreed that arts and culture made Wales a more interesting and vibrant place to live (85% agree) and supported public funding of arts and cultural projects (83% agree). More than three quarters (79%) also agreed that people would lose something of value if their area lost its arts and cultural activities.

Statements perhaps more likely to be perceived to be about the positive aspects of the arts in relation to themselves as an individual (e.g. arts and cultural activity help to enrich the quality of **my life**), received lower levels of agreement, although still overwhelmingly more positive than negative on the whole.

Figure 4: Attitudes towards the arts in Wales (% agree/disagree)



Base: all respondents (4,275)

Variation in agreement with the attitude statements by sub-groups of the population included the following:

- ***Arts and culture make Wales a more interesting and vibrant place to live in***
(85% agree overall)

<i>Higher agreement among:</i>	<i>Lower agreement among:</i>
<ul style="list-style-type: none">▪ Arts participants (once/year +) (92%)▪ ABC1 social grades (89%)▪ Welsh speakers (88%)▪ South Central Arts Council region (88%)▪ Arts attender (once/year +) (87%)	<ul style="list-style-type: none">▪ Not attended any arts events/activities in the last year (74%)▪ South East Arts Council region (79%)▪ BAME (inc. Eastern European) ethnic groups (79%)▪ Not participated any arts activates in last year (80%)▪ C2DE social grades (82%)

Those participating in at least one arts activity in the last year were more likely to agree that arts and culture make Wales a more interesting and vibrant place to live in (92%) than non-participants (80%). Levels of agreement among those attending arts events were also higher (87%) than those attending arts events (74%). This pattern of higher agreement among those engaged in the arts, and lower among those who did not attend or participate was evident across all attitude statements.

- ***I believe it is right that there should be public funding of arts and cultural projects***
(83% agree overall)

<i>Higher agreement among:</i>	<i>Lower agreement among:</i>
<ul style="list-style-type: none">▪ Arts participants (once/year +) (88%)▪ South Central Arts Council region (87%)▪ ABC1 social grades (86%)▪ Arts attender (once/year +) (85%)	<ul style="list-style-type: none">▪ Not attended any arts events/activities in the last year (73%)▪ C2DE social grades (80%)▪ Not participated any arts activates in last year (79%)

A six percentage point gap in agreement that there should be public funding of arts and cultural projects existed between those from higher social grades (86% agree) and those from lower C2DE social grades (80%).

- If my area lost its arts and cultural activities, the people living here would lose something of value (79% agree overall)**

Higher agreement among:	Lower agreement among:
<ul style="list-style-type: none"> Arts participants (once/year +) (86%) ABC1 social grades (85%) Those aged 65+ (84%) Welsh speakers (83%) South West Arts Council region (82%) Arts attender (once/year +) (81%) 	<ul style="list-style-type: none"> Not attended any arts events/activities in the last year (62%) South East Arts Council region (71%) 16 to 24 year olds (72%) Not participated any arts activates in last year (73%) C2DE social grades (74%)

As shown in the table above, some regional variation existed in responses to this statement, with those in the South East Arts Council region notably less likely to agree. Those in the South West region were most likely to agree (82%), followed by those in the North (81%) and South Central (79%)

- Skills gained from participating or learning about arts and cultural activity can help you get a job (68% agree overall)**

Higher agreement among:	Lower agreement among:
<ul style="list-style-type: none"> Arts participants (once/year +) (76%) South Central Arts Council region (73%) 35 to 44 year olds (73%) ABC1 social grades (72%) Welsh speakers (72%) 	<ul style="list-style-type: none"> Not attended any arts events/activities in the last year (58%) Not participated any arts activates in last year (61%) South East Arts Council region (62%) North Arts Council region (63%) C2DE social grades (64%) Those aged 55 + (65%)

Those from higher ABC1 social grades were eight percentage points more likely to agree that skills gained from participating or learning about arts and cultural activity can help you get a job than their C2DE counterparts (72% and 64% respectively agreeing). 35 to 44 year olds and Welsh speakers were also more likely to agree with this statement (73% and 72% doing so respectively).

- I believe the arts activity I attend, or take part in, represents good value for money**
(59% agree overall)

Higher agreement among:	Lower agreement among:
<ul style="list-style-type: none"> Arts participants (once/year +) (73%) ABC1 social grades (68%) Arts attender (once/year +) (64%) South West Arts Council region (63%) Arts attender (once/year +) (64%) 	<ul style="list-style-type: none"> Not attended any arts events/activities in the last year (27%) Not participated any arts activates in last year (48%) South East Arts Council region (50%) C2DE social grades (51%)

An even greater difference between ABC1 and C2DE social grades was apparent in terms of agreement with perceptions of arts activities being value for money – a 17 percentage point gap - 68% of ABC1's agreeing compared with 51% of C2DE's.

- Arts and cultural activity help to enrich the quality of my life**
(61% agree overall)

Higher agreement among:	Lower agreement among:
<ul style="list-style-type: none"> Arts participants (once/year +) (80%) ABC1 social grades (70%) South West Arts Council region (67%) Arts attender (once/year +) (64%) 	<ul style="list-style-type: none"> Not attended any arts events/activities in the last year (37%) Not participated any arts activates in last year (46%) C2DE social grades (52%) South East Arts Council region (55%) North Arts Council region (56%) 16 to 24 year olds (56%)

Engagement with the arts and social grade were again correlated with likelihood of agreeing that arts and cultural activity contributed to quality of survey participants' lives. Younger people aged 16 to 24, those in the South East and North Wales Arts Council regions were also less likely to agree that arts and cultural activity enriched the quality of their lives (56%, 56% and 55% agreeing respectively).

- **I feel inspired by artistic activity and enjoy getting involved**
(52% agree overall)

Higher agreement among:	Lower agreement among:
<ul style="list-style-type: none">▪ Arts participants (once/year +) (77%)▪ ABC1 social grades (62%)▪ South West Arts Council region (58%)▪ 25 to 34 year olds (56%)▪ Arts attender (once/year +) (56%)	<ul style="list-style-type: none">▪ Not attended any arts events/activities in the last year (30%)▪ Not participated any arts activates in last year (34%)▪ C2DE social grades (44%)▪ North Arts Council region (45%)

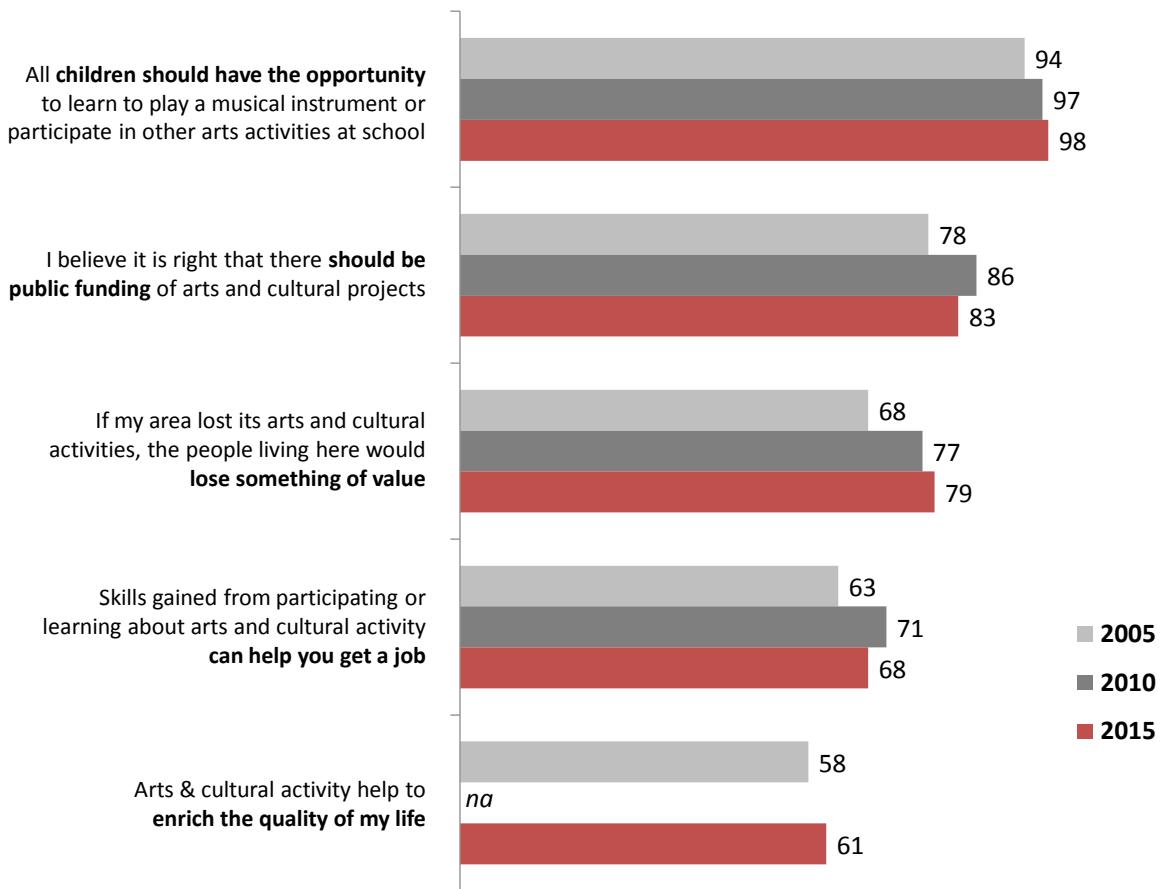
In addition to being correlated with engagement and social grade, those in the South West Arts Council region and 25 to 34 year olds were more likely to feel inspired by artistic activity and enjoy getting involved (58% and 56% agreeing respectively).

3.1 Comparing changes in attitudes over time

Where comparable statements were presented to participants of the 2010 (and 2005) Arts in Wales surveys, it has been possible to track change in attitudes over time (see figure 5).

Agreement with all comparable statements was higher in 2010 than in 2005, while a relatively consistent picture of overall agreement with each statement existed when comparing the two most recent studies (where differences of no more than three percentage points were apparent).

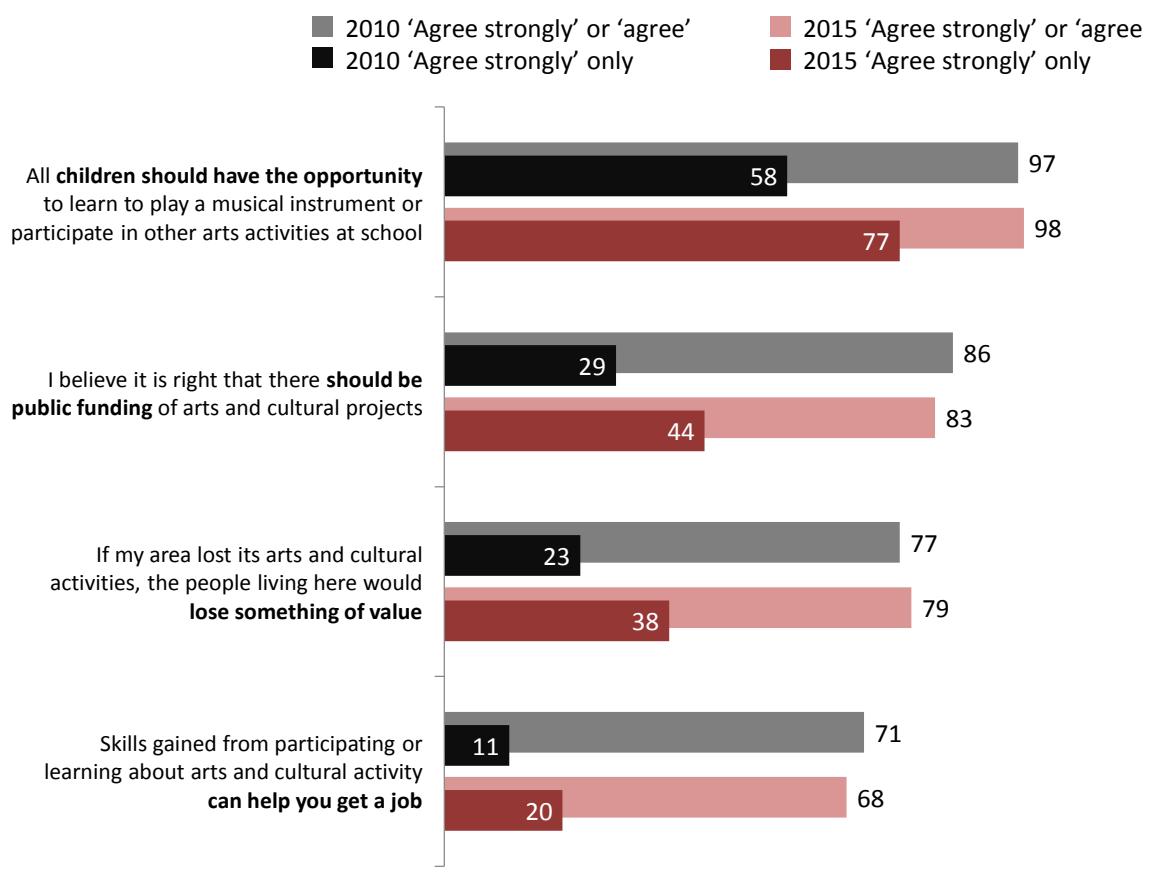
Figure 5: Attitudes towards the arts in Wales – by survey year (% ‘agree strongly’ / ‘agree’)



Base (all): 2015 = 4,275; 2010 = 7,083; 2005 = 6,851.

However further examination of the data, focusing solely on the proportions ‘agreeing strongly’ from the 2010 and 2015 surveys reveals some notable differences. For example, looking at the statement ‘I believe it is right that there should be public funding of arts and cultural projects’ - while 86% ‘agreed’ or ‘agreed strongly’ in 2010 , just 29% ‘agreed strongly’ (see figure 6). Whereas in the 2015 survey, despite slightly fewer agreeing overall (83%), as many as 44% ‘agreed strongly’ – a 15 percentage point increase in the proportion ‘agreeing strongly’ with this statement since 2010. This pattern of increasing levels of strong agreement was also apparent for all other comparable statements, suggesting strength of feeling is stronger among those agreeing, than in 2010.

Figure 6: Attitudes towards the arts in Wales – 2010 v. 2015 (%)



Base (all): 2015 = 4,275; 2010 = 7,083.

4. Arts attendance (overall)

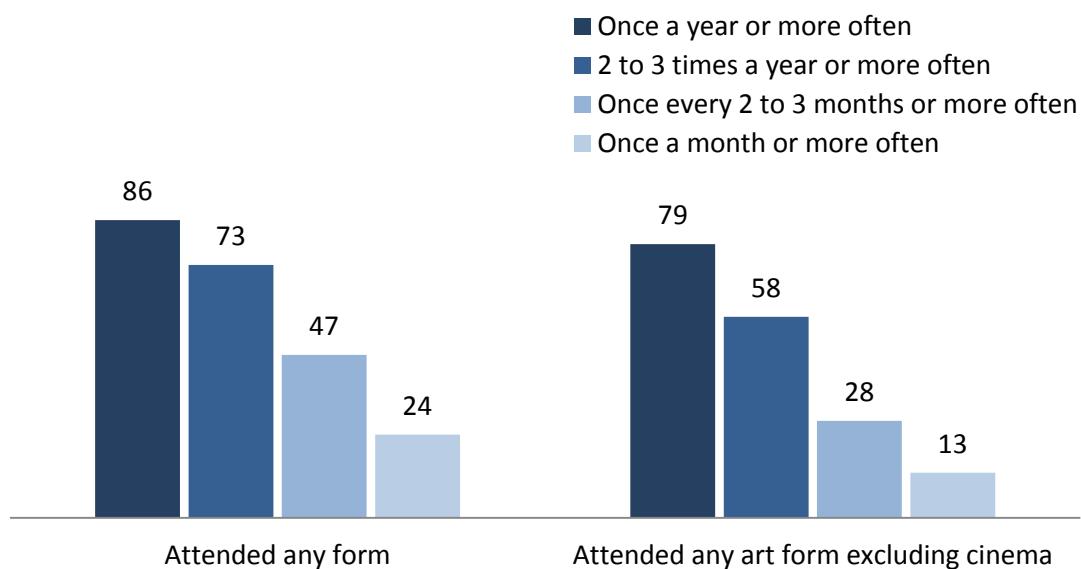
4.1 Overall frequency of arts event attendance

All survey participants were asked how often they attended each of the following arts activities:

- Cinema
- Musical (not opera)
- Opera
- Ballet
- Contemporary dance
- 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
- Circus (not involving animals)
- Arts festival (e.g. music, literature, drama, dance or Eisteddfod)
- Pantomime

Approaching nine in ten (86%) of the adult population in Wales had attended any of the art forms listed above at least once a year or more often and approaching three quarters (73%) had done so 2 to 3 times a year or more often (see figure 7). If cinema attendance is excluded, annual attendance of at least one arts event reduced to just fewer than eight in ten (79%), while a bigger decrease was evident in terms of those attending at least one arts activity 2 to 3 times a year or more often (from 73% including cinema to 58% without).

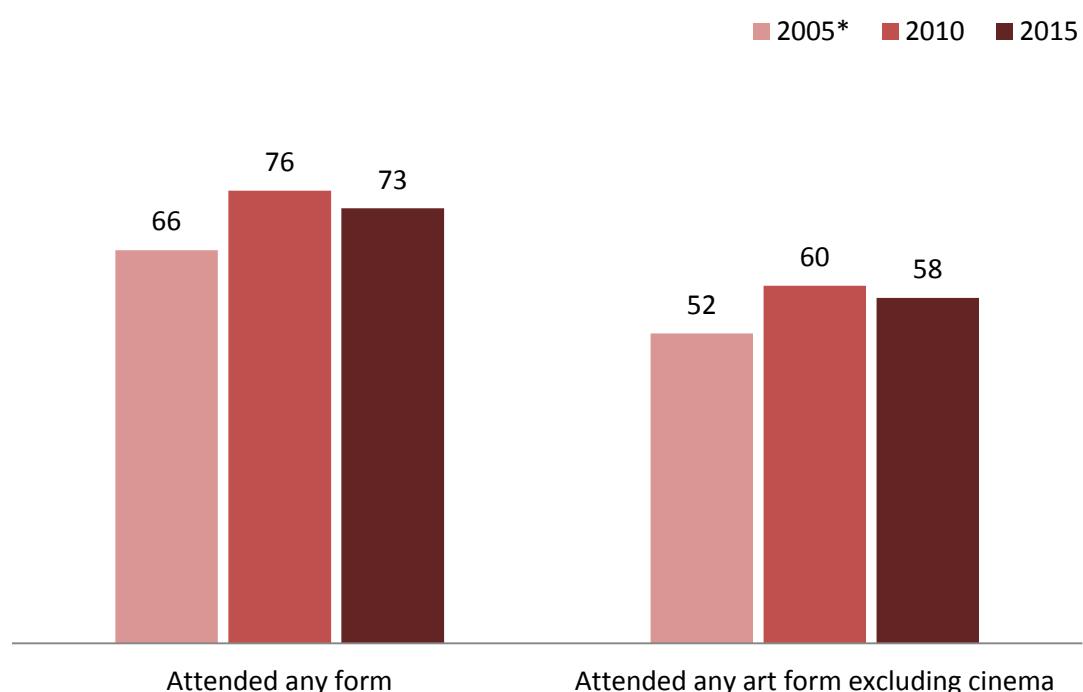
Figure 7: % attending any arts event



Base: all respondents (4,275)

Comparing attendance recorded in the 2015 survey with 2010 reveals a slight decrease in the proportion attending at least one arts activity 2 to 3 times a year or more often, from 76% to 73% (based on all art forms) or 60% to 58% (excluding cinema). Despite slight decline since 2010, arts attendance remained higher than a decade ago in 2005, when approximately two thirds of the adult population in Wales had attended at least one arts event 2 to 3 times a year or more, or just over half (52%) when cinema is excluded, as shown in figure 8.

Figure 8: % attending at least one arts event 2 to 3 times a year or more often



*Activity list did not include: Circus (not involving animals), arts festival (e.g. music, literature, drama, dance or Eisteddfod) and pantomime in 2005.

Base (all): 2015 = 4,275; 2010 = 7,083; 2005 = 6,851.

4.2 Arts attendance among demographic groups

Analysis of the data by key demographic groups of interest to the Arts Council is summarised in figure 9. Where possible, attendance among sub-groups of the population has also been compared with attendance recorded in 2010 (figure 10).

Figure 9:% attending at least one arts event 2 to 3 times a year or more often – by demographic sub-groups

	2015	Index	Base:
All	73	100	4,275
Gender			
Male	74	101	1,940
Female	72	99	2,335
Age			
16 to 24	86	118	694
25 to 34	84	115	707
35 to 44	80	110	575
45 to 54	74	101	624
55 to 64	71	97	552
65+	55	75	1,123
Children			
Any dependent children	82	112	1,294
Any aged 0 to 4	78	107	556
Any aged 5 to 11	84	115	696
Any aged 12 to 15	81	111	512
No dependent children (0 to 15)	69	95	2,957
Welsh speaking			
Fluent Welsh speaker	75	103	445
Non fluent Welsh speaker	79	108	427
Welsh speakers (total)	77	105	872
Non Welsh speakers	72	99	3,403
ACW region			
North (Conwy, Denbighshire, Flintshire, Gwynedd, Anglesey, Wrexham)	75	103	1,038
South West (Carmarthenshire, Ceredigion, Neath Port Talbot, Pembrokeshire, Powys, Swansea)	73	100	1,063
South Central (Bridgend, Cardiff, Merthyr Tydfil, Rhondda Cynon Taf, The Vale of Glamorgan)	75	103	1,150
South East (Blaenau Gwent, Caerphilly, Monmouthshire, Newport, Torfaen)	67	92	1,024
Communities First⁵			
Communities First area	67	92	1,122
Not Communities First area	75	103	3,147
Social grade			
AB	87	119	673
C1	82	112	1,308
C2	69	95	814
DE	60	82	1,458
Highest qualification			
HNC, HND, degree or above	87	119	1,216
GCSE, A level or equivalent	76	104	1,676
Other	66	90	254
No qualifications	47	64	962
Disability / long term illness			
With disability / long term limiting illness	50	68	943
No disability / long term limiting illness	80	110	3,327
BAME / Eastern European	79	108	419

⁵ The most deprived communities in Wales, as defined by the Welsh Index of Multiple Deprivation 2011. <http://gov.wales/topics/people-and-communities/communitiesfirst/?lang=en>

Figure 10:

% attending at least one arts event 2 to 3 times a year or more often – by demographic sub-groups (2015 v. 2010)

	2010	2015	Net change (2015 – 2010)
All	76	73	-3
Gender			
Male	75	74	-1
Female	76	72	-4
Age			
16 to 24	91	86	-5
25 to 34	87	84	-3
35 to 44	83	80	-3
45 to 54	77	74	-3
55 to 64	72	71	-1
65+	55	55	0
Welsh speaking			
Fluent Welsh speaker	74	75	+1
Speak any Welsh	79	77	-2
No Welsh language ability	73	71	-2
Social grade			
AB	88	87	-1
C1	83	82	-1
C2	78	69	-9
DE	62	60	-2
Disability / long term illness			
With disability / long term limiting illness	55	50	-5
No disability / long term limiting illness	81	80	-1

Frequency of arts event attendance was similar for both males and females (74% and 72% respectively having attended at least one arts event 2 to 3 times a year or more often), however comparison with 2010 shows females were less likely to be attending arts events in 2015 than in 2010, when 76% were attending 2 to 3 times a year or more often.

Younger people were more likely to have attended arts events than their older counterparts, with 86% of 16 to 24 year olds attending an arts event 2 to 3 times a year or more often, compared with just over half (55%) of those aged 65 and over. Attendance levels among the youngest age group, however, have dipped compared with 2010 (91%) whilst levels of overall attendance among those aged over 65 have remained consistent with 2010. This has resulted in a narrowing of the attendance gap between the youngest and oldest age groups - from 36 percentage points in 2010 to 31 percentage points in 2015.

Reflecting attendance frequency by age, those with dependent children (up to 15 years old) were more likely to have attended arts events than those without - Eight in ten of those with dependent children having attended at least one arts event 2 to 3 times a year or more often compared with fewer than seven in ten of those without dependent children.

Non-Welsh speakers were slightly less likely to have attended an arts event (72%) than Welsh speakers (77%), as were those in the South East Arts Council region (67%, compared with the rest of Wales - 74%).

Other geographic differences were also apparent when comparing Communities First areas (the most deprived communities in Wales, as defined by the Welsh Index of Multiple Deprivation 2011) with the rest of Wales. Residents of Communities First areas were eight percentage points less likely to have attended at least one arts event 2 to 3 times a year or more often than those in other areas of Wales.

It is worth noting that this disparity in attendance by social deprivation indicators such as Communities First areas / non Communities First areas was not limited to *arts* activates/events and was also evident for other leisure activities - Although not directly comparable metrics⁶, similar net differences to a six percentage point difference recorded for Arts event attendance (once a year or more often) were also recorded for activities including outings to the countryside/seaside, visiting tourist or historic attractions and spectating at sports events (see figure 11).

Figure 11: % attending other leisure activities in the last 12 months – by Communities First / non-Communities First areas

	Non Communities First area	Communities First area	Net difference (Non Communities First areas – Communities First areas)
Attended any arts events (last 12 months)	87	81	-6
Go on an outing to the countryside or seaside	72	64	-8
Visit a tourist or historic attraction	56	43	-13
Go to a sports event as a spectator	43	35	-8
Base:	3,147	1,122	

Social grade and the highest educational qualification held by participants in particular were correlated with attendance. Approaching nine in ten of those from socio-economic grades (AB - higher administrative or professional occupations) had attended an arts event 2 to 3 times a year or more often, compared with just six in ten of those from lower DE social grades (semi-skilled and unskilled manual workers, casual workers and those dependent on state benefits), resulting in a gap of 27 percentage points between these two socio-economic groups. Whilst the gap between these two groups at either end of the spectrum remains largely unchanged compared the 2010, - those from social grade classification C2 (skilled manual workers with a responsibility for other people) saw the largest decline in arts attendance (down 9 percentage points).

As was the case with those from the highest 'AB' socio-economic grades, almost nine in ten (87%) of these with qualifications of HNC, HND or degree level or above had attended an arts event 2 or 3

⁶ Overall arts attendance was established by aggregating responses to individual questions about frequency of attendance at individual arts forms, while non-arts activity attendance was established by asking participants to identify which activities they had undertaken in the last year from a list. See questionnaire in the appendix.

times a year or more. However, fewer than half (47%) of those without any qualifications had done so, meaning a gap of 40 percentage points existed between these groups.

Those with a disability (long illness, health problem or disability which limits daily activities) also had lower levels of attendance (50%), a five percentage point decline since 2010.

Finally, participants from BAME and Eastern European groups were slightly more likely to be arts event attendees (79%) than the overall population average (73%).

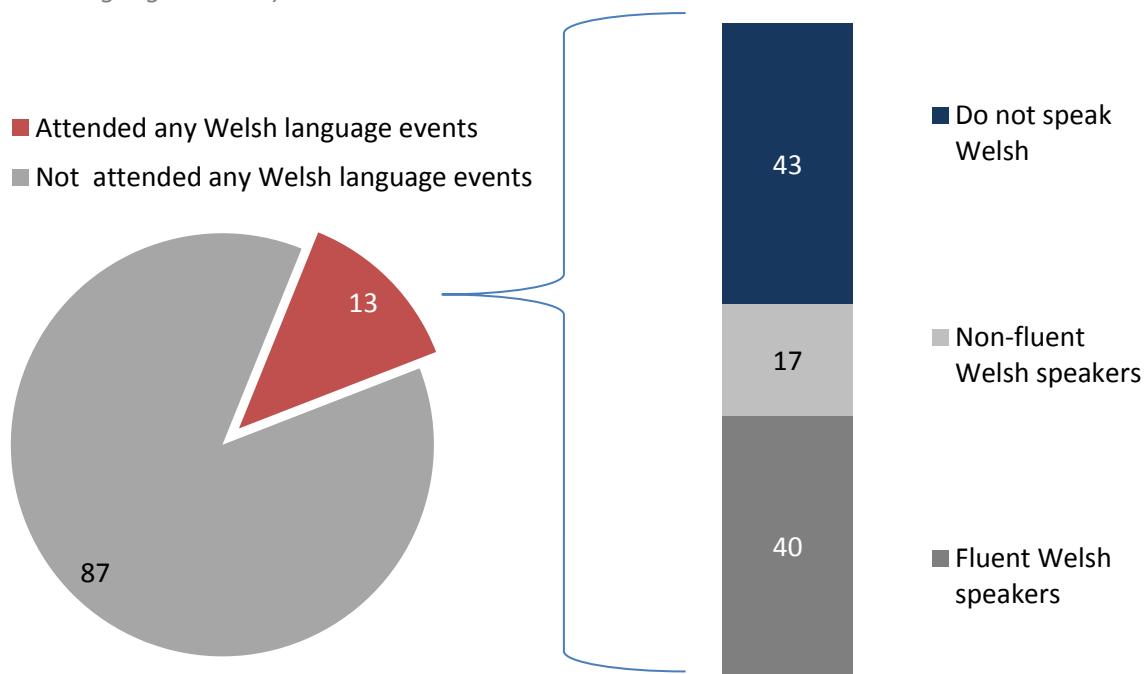
4.3 Welsh language arts event attendance/participation

More than one in ten (13%) of the adult population in Wales had attended or participated in a Welsh language arts event in the last year.

Examining the data by Welsh language ability revealed almost half (48%) of fluent Welsh speakers had attended or participated in a Welsh language arts event in the last year, while one in five (21%) non-fluent Welsh speakers had done so, compared with fewer than one in ten (7%) of non Welsh speakers.

Because non Welsh speakers significantly outnumber Welsh speakers in the population, the profile of those attending Welsh language events are split fairly evenly between the two groups (see figure 12) - More than two fifths of those attending any Welsh language arts events in the last year (43%) did not speak Welsh, almost a fifth (17%) were able to say at least a few words in Welsh, but were not fluent, and the remaining two fifths (40%) were fluent Welsh speakers.

Figure 12: Attendance/participation in Welsh language arts events – by Welsh language ability
(Q: *Have any of the arts events that you have attended or participated in during the last year been Welsh language events?*)



4.4 Location of most recent arts event attended

Those who ever attended arts activities were asked where they had attended their most recent arts activity (see figure 13). Approaching two thirds had attended their most recent arts activity somewhere within their own local authority, with approximately half of these stating this had been in their local neighbourhood.

Regionally, those in the North Wales Arts Council region were most likely to have attended elsewhere in the UK (21%, compared with an average of 12% doing so overall). Although, not established by the survey, this may have involved travel to cities and towns in North West England, given proximity for some of those living in North Wales. Analysis by groups of unitary authorities would appear to support this with those in North East Wales (Wrexham / Flintshire / Denbighshire) more likely to have travelled to the rest of the UK for recent arts activity (28%) than those living further west in this region (Anglesey / Gwynedd / Conwy – 12%).

In contrast, those in the South East region were most likely to have attended an arts event in their local neighbourhood (39% vs. 29% overall).

Those living in the South West and South Central regions were most likely to have attended somewhere else (not in neighbourhood) within their own local authority.

Survey participants from lower socio-economic grades DE were less likely to have travelled to attend their most recent arts event compared with higher socio-economic grades. Over three quarters of DEs (76%) had attended in their local neighbourhood or local authority compared with 56% of ABs. This was also true of those with no qualifications (73% attending attended in their local neighbourhood / authority).

Figure 13: Location of most recent arts activity attended (%)

	All	Arts Council region				Social grade			
		North	South West	South Central	South East	AB	C1	C2	DE
In local neighbourhood	29	29	32	21	39	27	26	27	36
Somewhere else in own LA	35	29	37	42	24	29	33	33	40
Elsewhere in Wales	22	19	18	25	25	26	23	25	16
Rest of UK	12	21	10	9	10	14	15	12	7
Abroad	2	1	2	2	1	3	2	1	1
Don't know / Not answered	1	1	1	1	2	1	0	1	1
Base (all who ever attend arts events):	3,847	961	979	1,031	876	653	1,243	718	1,212

4.5 Profiling non-attendees

More than one in ten (14%) had not participated in any arts activity in the last 12 months. The following section provides an overview of which demographic groups are the most (and least) likely to be non-attendees (those not attending any arts activities in the last 12 months). See figure 14.

Figure 14:

% not attending any arts events in the last year – by demographic sub-groups

	2015	Index	Base:
Total – not attended any arts events in the last year	14	100	4,275
Gender			
Male	15	107	1,940
Female	14	100	2,335
Age			
16 to 24	7	50	694
25 to 34	5	36	707
35 to 44	10	71	575
45 to 54	14	100	624
55 to 64	16	114	552
65+	26	186	1,123
Children			
Any dependent children	7	50	1,294
Any aged 0 to 4	9	64	556
Any aged 5 to 11	6	43	696
Any aged 12 to 15	7	50	512
No dependent children (0 to 15)	17	121	2,957
Welsh speaking			
Fluent Welsh speaker	13	93	445
Non fluent Welsh speaker	9	64	427
Welsh speakers (total)	11	79	872
Non Welsh speakers	15	107	3,403
ACW region			
North (Conwy, Denbighshire, Flintshire, Gwynedd, Anglesey, Wrexham)	11	79	1,038
South West (Carmarthenshire, Ceredigion, Neath Port Talbot, Pembrokeshire, Powys, Swansea)	12	86	1,063
South Central (Bridgend, Cardiff, Merthyr Tydfil, Rhondda Cynon Taf, The Vale of Glamorgan)	15	107	1,150
South East (Blaenau Gwent, Caerphilly, Monmouthshire, Newport, Torfaen)	19	136	1,024
Communities First⁷			
Communities First area	19	136	1,122
Not Communities First area	13	93	3,147
Social grade			
AB	5	36	673
C1	8	57	1,308
C2	18	129	814
DE	23	164	1,458
Highest qualification			
HNC, HND, degree or above	5	36	1,216
GCSE, A level or equivalent	12	86	1,676
Other	18	129	254
No qualifications	32	229	962
Disability / long term illness			
With disability / long term limiting illness	31	221	943
No disability / long term limiting illness	9	64	3,327
BAME / Eastern European	11	79	419

⁷ The most deprived communities in Wales, as defined by the Welsh Index of Multiple Deprivation 2011. <http://gov.wales/topics/people-and-communities/communitiesfirst/?lang=en>

The proportion not attending arts events in the last year was similar for both males and females (15% and 14% respectively). However differences were apparent by age of respondent, with non-attendance being more prevalent among older age groups – Just 7% of 16 to 24 year olds and 5% of 25 to 34 year olds were non-attendees, compared with 26% of those aged 65 and over.

A distinctive difference can also be seen when comparing the non-attendance of those with and without children. Those without children were 10 percentage points more likely to be non-attendees than those with children.

Non Welsh speakers were more likely to be non-attendees (15%), than Welsh speakers (11%) and in terms of geography, the South East Wales Arts Council region (inc. Blaenau Gwent, Caerphilly, Monmouthshire, Newport, Torfaen) was shown to have the highest proportion of those not attending arts events (19%), compared to the North, South West and South Central areas (11%, 12%, 15% respectively).

In terms of social deprivation, those living in Communities First areas within Wales were more likely to be non-attendees (19%), compared to those in non Communities First areas (13%). A clear trend is also apparent based on the social grade of those interviewed - Just 5% of higher social grades 'AB' were non-attendees, compared with 23% of the lower 'DE' social grades – an 18 percentage point gap between higher and lower social grades.

As was the case with those from the highest 'AB' socio-economic grades, more than one in twenty (5%) of those with qualifications of HNC, HND or degree level or above were non participants, while more than three in ten (32%) of those without any qualifications were non attendees (a marked 27 percentage point gap).

Those with a disability (long illness, health problem or disability which limits daily activities) were less likely to participate in arts events (31% were non participants) compared to those with no disability (9%).

5. Arts participation (overall)

5.1 Overall frequency of arts participation

The frequency of participation in the arts activities listed below was recorded as part of the survey:
(see footnote for details of differences between 2005, 2010 and 2015 activity lists)

- **Music** of any kind including playing an instrument, singing, helping out in a choir, operatic society, brass band, orchestra, folk, rock or jazz group
- **Drama or theatrical activity** of any kind
- **Dance activity** of any kind
- **Film and video making** including photography other than family, holiday or party snaps⁸
- **Visual arts and crafts**, for example, painting, sculpting, pottery, wood-turning, jewellery making, weaving or textiles⁹
- **Creative writing**, for example, poetry or stories
- **Digital arts**: creating and making original artwork or animation using digital technology¹⁰
- **Circus skills**, street arts or other physical theatre activity¹¹

Two fifths (43%) of adults in Wales participated in at least one arts activity once a year or more often (see figure 14). Only a seven percentage point difference was evident between overall proportions participating in at least one arts activity *annually* and those who participated in at least one activity on at least a *monthly* basis - indicating that for the vast majority if they participated in the arts at all, it was likely to be done relatively frequently (at least monthly).

As digital arts was included as a stand-alone activity for the 2015 survey for the first time, comparison was also made excluding this activity from the overall participation calculations, to establish what difference the inclusion or otherwise of this activity made to the overall participation levels recorded. As can be seen in figure 15, excluding digital arts made a statistically insignificant difference of no more than one percentage point to overall participation levels (across all frequency of participation measures).

Activity list amendments (2005 / 2010 / 2015 surveys):

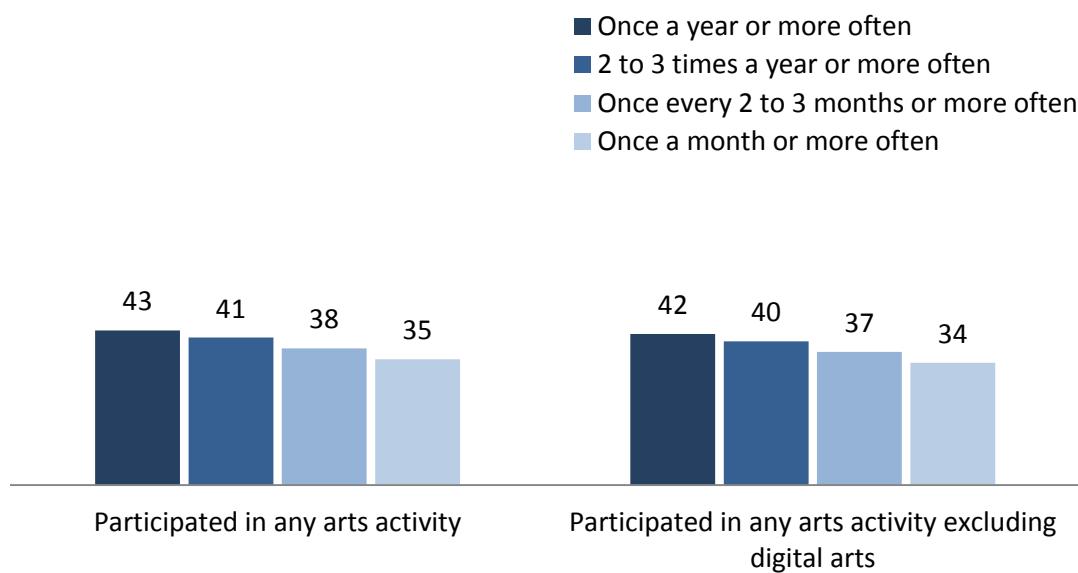
⁸ For the 2015 survey 'digital media' was removed from the definition of the film and video making category (previously 'Film and video making including digital media or photography other than family, holiday or party snaps').

⁹ For the 2015 survey 'computer graphics' was removed from the definition of the visual arts and crafts category (previously 'Visual arts and crafts, for example, painting, sculpting, computer graphics, pottery, wood-turning, jewellery making, weaving or textiles').

¹⁰ Digital arts were added as a stand-alone activity for the 2015 survey.

¹¹ Circus skills were added to the activity list in 2010.

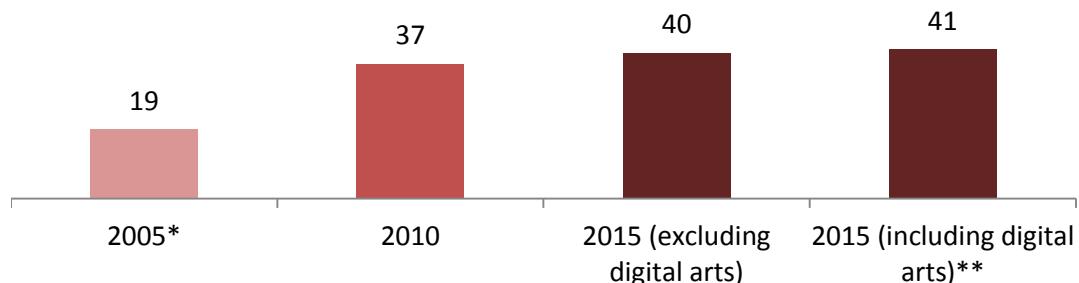
Figure 15: % participating in any arts activity



Base: all respondents (4,275)

Examining trends in participation over time revealed that following a substantial increase in arts participation from 2005 to 2010, a smaller increase was recorded when comparing the 2010 Arts in Wales survey with 2015, from 37% in 2010 to 40/41% (depending on whether or not digital arts are included in the measure) in 2015.

Figure 16: % participating in at least one arts event 2 to 3 times a year or more often



*Activity list did not include: Circus skills, street arts or other physical theatre activity.

**Digital arts added as stand-alone activity in 2015

Base (all): 2015 = 4,275; 2010 = 7,083; 2005 = 6,851.

5.2 Arts participation among demographic groups

Analysis of levels of arts participation among sub groups of the population are summarised in figure 17, and where it is possible to make comparisons with 2010 survey data, these are detailed in figure 18.

Figure 17:% participating in at least one arts event 2 to 3 times a year or more often – by demographic groups

	2015	Index	Base:
All	41	100	4,275
Gender			
Male	40	98	1,940
Female	42	102	2,335
Age			
16 to 24	46	112	694
25 to 34	45	110	707
35 to 44	39	95	575
45 to 54	39	95	624
55 to 64	45	110	552
65+	37	90	1,123
Children			
Any dependent children	40	98	1,294
Any aged 0 to 4	41	100	556
Any aged 5 to 11	41	100	696
Any aged 12 to 15	41	100	512
No dependent children (0 to 15)	42	102	2,957
Welsh speaking			
Fluent Welsh speaker	41	100	445
Non fluent Welsh speaker	52	127	427
Welsh speakers (total)	47	115	872
Non Welsh speakers	40	98	3,403
ACW region			
North (Conwy, Denbighshire, Flintshire, Gwynedd, Anglesey, Wrexham)	40	98	1,038
South West (Carmarthenshire, Ceredigion, Neath Port Talbot, Pembrokeshire, Powys, Swansea)	42	102	1,063
South Central (Bridgend, Cardiff, Merthyr Tydfil, Rhondda Cynon Taf, The Vale of Glamorgan)	43	105	1,150
South East (Blaenau Gwent, Caerphilly, Monmouthshire, Newport, Torfaen)	37	90	1,024
Communities First¹²			
Communities First area	35	85	1,122
Not Communities First area	43	105	3,147
Social grade			
AB	57	139	673
C1	48	117	1,308
C2	35	85	814
DE	31	76	1,458
Highest qualification			
HNC, HND, degree or above	57	139	1,216
GCSE, A level or equivalent	38	93	1,676
Other	38	93	254
No qualifications	22	54	962
Disability / long term illness			
With disability / long term limiting illness	37	90	943
No disability / long term limiting illness	42	102	3,327
BAME / Eastern European	38	93	419

¹² The most deprived communities in Wales, as defined by the Welsh Index of Multiple Deprivation 2011. <http://gov.wales/topics/people-and-communities/communitiesfirst/?lang=en>

Figure 18:

% participating in at least one arts event 2 to 3 times a year or more often – by demographic sub-groups (2015 v. 2010)

	2010	2015	Net change (2015 – 2010)
All	37	41	+4
Gender			
Male	33	40	+7
Female	40	42	+2
Age			
16 to 24	46	46	0
25 to 34	38	45	+7
35 to 44	34	39	+5
45 to 54	32	39	+7
55 to 64	37	45	+8
65+	34	37	+3
Welsh speaking			
Fluent Welsh speaker	36	41	+5
Speak any Welsh	42	47	+5
No Welsh language ability	34	38	+4
Social grade			
AB	47	57	+10
C1	40	48	+8
C2	34	35	+1
DE	30	31	+1
Disability / long term illness			
With disability / long term limiting illness	33	37	+4
No disability / long term limiting illness	38	42	+4

As was the case with arts attendance, similar proportions of both males (40%) and females (42%) participated in at least one arts activity 2 or 3 times a year or more. Comparing with 2010, a seven percentage point increase in the proportion of males participating in the arts has narrowed the gender participation gap from seven percentage points in 2010 to two percentage points in 2015.

Participation tended to be higher among younger age groups (46% of 16 to 24 year olds and 45% of 25 to 34 year olds participating respectively), while 35 to 54 year olds were relatively less likely to participate in the arts (39% doing so). Among older age categories, 55 to 64 year olds were also more likely to participate in the arts (45% doing so) than those aged 35 to 54, but participation was lowest among the oldest age category - 37% of those aged 65 and over had participated in at least one arts activity 2 to 3 times a year or more often. None of these age categories showed declining participation when comparing with 2010 and those in the middle age groups (25 to 64) were the most likely to show an increase in participation levels.

Unlike arts attendance (where those with dependent children were more likely to attend arts activities), those with dependent children were similar in terms of *participation* levels to those without dependent children (40% and 42% respectively participating in at least one arts activity 2 to 3 times a year or more often).

As was the case in 2010, those with any level of Welsh speaking ability were more likely to participate in the Arts than non Welsh speakers (47% v. 40% participating in at least one arts activity 2 to 3 times a year or more often). Non-fluent Welsh speakers in particular were more likely to participate (52% doing so, compared with 40% of non Welsh speakers).

Regionally, as was the case with attendance, those in the South East Arts Council region were a little less likely to participate in the arts (37% doing so in comparison with an overall average of 41%). Again, as was the case with participation, those resident in Communities First areas were eight percentage points less likely to participate in at least one arts activity 2 to 3 times a year or more often.

Examining participation in other leisure activities by indicators of social deprivation such as Communities First areas / non Communities First areas reveals lower participation among those in Communities First areas across a wide range of different activities (see figure 19), indicating that gaps in participatory activities are not only an issue for the arts. These other activities include volunteering, gardening, sport, DIY, going out for a drink or meal and day trips. The exception to this was playing computer games where those in Communities First areas were *more* likely to participate in the activity than those in non-Communities First areas.

Figure 19: % participating in other leisure activities in the last 12 months – by Communities First / non-Communities First areas

	Non Communities First area	Communities First area	Net difference (Non Communities First areas – Communities First areas)
Participated in any arts activity (last 12 months)	45	36	-9
Done any volunteering	23	12	-11
Spent time gardening	58	48	-10
Play\take part in sport of any kind	29	20	-9
Spent time doing DIY	53	46	-7
Go out for a drink or meal	85	80	-5
Go on a day trip e.g. shopping, spa day	68	65	-3
Play computer or console games	31	37	+7
Base:	3,147	1,122	

Again, mirroring arts attendance, social grade and highest educational qualification were strong indicators of arts participation. A 26 percentage point gap in participation levels existed between the highest 'AB' and lowest 'DE' socio economic groups - A gap which has widened since 2010 due to increasing participation in at least one arts activity 2 to 3 times a year or more often among the higher AB and C1 social grades, while participation among lower C2 and DE social grades have remained broadly static.

As was the case with those from the highest 'AB' socio-economic grades, more than half (57%) of those with qualifications of HNC, HND or degree level or above had participated in an arts activity 2 or 3 times a year or more. However, only slightly more than one in five (22%) of those without any qualifications had done so, resulting in a gap of 35 percentage points existed between these groups.

Those with a disability (long illness, health problem or disability which limits daily activities) were less likely to participate in arts activity than those without (37% and 42% doing so respectively). This gap is the same as was found in 2010.

5.3 Location of most recent arts activity participation

Survey participants were asked where their most recent arts participation had taken place, which revealed arts participation was more localised than arts attendance – For more than half (55%) the most recent arts participation took place within their own home and almost a quarter (24%) said the activity was within their local neighbourhood. Just one in ten (11%) participated elsewhere in their own local authority.

Across all Arts Council regions, participation was most likely to take place in participants' own homes, followed by within their local neighbourhood. However those in the South East were more likely than the overall average to participate in their local neighbourhood (31% compared with 24% overall). Participants in the North Wales region were most likely to have taken part in the rest of the UK – 6% doing so compared with an average of 3% overall.

Although participation was also most likely to take place in participants' homes across all social grades, those from higher AB social grades were relatively *less* likely to have participated in their own home on the last occasion and were relatively *more* likely to have participated outside their own local authority - 13% participating outside their local authority on the last occasion, compared with just 5% of arts participants from lower DE social grades.

Figure 20: Location of most recent arts activity participated in (%)

	All	Arts Council region			Social grade				
		North	South West	South Central	South East	AB	C1	C2	DE
In own home	55	52	59	57	46	48	55	61	57
In local neighbourhood	24	25	25	19	31	24	23	24	26
Somewhere else in own LA	11	11	9	14	8	13	11	7	10
Elsewhere in Wales	4	5	2	4	3	6	4	2	1
Rest of UK	3	6	2	3	4	5	3	3	3
Abroad	1	1	2	1	2	2	2	1	1
Don't know / Not answered	1	0	1	2	2	1	1	1	2
Base (all who ever attend arts events):	1,969	458	534	554	423	417	698	319	527

5.4 Profiling non-participants

More than half (57%) of the Welsh population had not participated in any arts activities in the last 12 months. This section provides an overview of which demographic groups are more and less likely to be 'non participants' (defined as those who have not participated in any arts activity in the last 12 months). See figure 21.

Figure 21:

% not participating in any arts events in the last year – by demographic sub-groups

	2015	Index	Base:
Total – not participated in any arts activities in the last year	57	100	4,275
Gender			
Male	57	100	1,940
Female	57	100	2,335
Age			
16 to 24	52	91	694
25 to 34	54	95	707
35 to 44	59	104	575
45 to 54	59	104	624
55 to 64	53	93	552
65+	62	109	1,123
Children			
Any dependent children	58	102	1,294
Any aged 0 to 4	58	102	556
Any aged 5 to 11	57	100	696
Any aged 12 to 15	56	98	512
No dependent children (0 to 15)	57	100	2,957
Welsh speaking			
Fluent Welsh speaker	58	102	445
Non fluent Welsh speaker	46	80	427
Welsh speakers (total)	52	91	872
Non Welsh speakers	59	104	3,403
ACW region			
North (Conwy, Denbighshire, Flintshire, Gwynedd, Anglesey, Wrexham)	58	102	1,038
South West (Carmarthenshire, Ceredigion, Neath Port Talbot, Pembrokeshire, Powys, Swansea)	56	98	1,063
South Central (Bridgend, Cardiff, Merthyr Tydfil, Rhondda Cynon Taf, The Vale of Glamorgan)	55	96	1,150
South East (Blaenau Gwent, Caerphilly, Monmouthshire, Newport, Torfaen)	62	109	1,024
Communities First¹³			
Communities First area	64	112	1,122
Not Communities First area	55	96	3,147
Social grade			
AB	42	74	673
C1	49	86	1,308
C2	64	112	814
DE	68	119	1,458
Highest qualification			
HNC, HND, degree or above	41	72	1,216
GCSE, A level or equivalent	60	105	1,676
Other	60	105	254
No qualifications	76	133	962
Disability / long term illness			
With disability / long term limiting illness	61	107	943
No disability / long term limiting illness	56	98	3,327
BAME / Eastern European	59	104	419

¹³ The most deprived communities in Wales, as defined by the Welsh Index of Multiple Deprivation 2011. <http://gov.wales/topics/people-and-communities/communitiesfirst/?lang=en>

No discernible differences in non-participation levels were apparent for men and women (both 57%), however older age groups were most likely to be non-participants (62%) than their younger 16 to 24 year old counterparts (52%).

As is the case with arts with attendance, non Welsh speakers were also more likely to be non-participants (59%) than Welsh speakers (52%). Again, consistently with attendance levels, those in the South East Wales Arts Council region had a higher proportion of those not participating in arts activity (62%), compared to the South Central, South West and North Wales areas (55%, 56%, 58% respectively).

Examination of non-participation levels by Communities First / non-Communities first areas revealed those in Communities First areas were less likely to participate - 64% had not participated in any arts activities in the last year, compared with 55% of those from other areas of Wales.

Particularly marked differences in non-participation were apparent by social grade and educational attainment - a 26 percentage point gap existed between those from higher 'AB' social grades (42% non-participants) and lower 'DE' grades (68%), while an even greater gap of 35 percentage points existed between those with qualifications of HNC, HND or degree level or above (41% non-participants) and those without any qualifications (76%).

Those with a disability or long term limiting illness were 5 percentage points more likely to be non-participants (61% had not participated in any arts activity in the last year), than those without (56%).

6. Barriers to attendance/participation

Having established the frequency of attending and participating in different art forms, survey participants were asked what, if anything, prevented them from going to or taking part in the arts, at all, or more often than they did currently. Survey participants chose their answers from a list provided to them and were able to choose more than one answer if they wished.

The main barrier to attendance, which was mentioned almost twice as frequently as any other individual barrier, was difficulty in finding the time (mentioned by 38%). Cost (23%), family commitments/childcare (21%), nothing being available near to home (18%), lack of arts activities of interest (17%), and lack of appeal of the arts generally (16%), were all mentioned by approximately one in five, while health reasons / old age was a barrier for slightly fewer (14%).

Figure 20 provides a full breakdown of barriers mentioned, and provides analysis by two classifications related to social inclusion: whether or not the survey participant was resident in a Communities First area and social grade.

Those resident in Communities First areas were slightly more likely to identify family commitments, cost, health reasons and a lack of interest ('the arts are just not for me'), than their counterparts, who were more likely to say a lack of time was a barrier.

Differences were more marked when responses from the highest (AB) social grades are compared with those from the lower DE social grades. For example, ABs were 13 percentage points more likely to identify a lack of time as a barrier than DEs. DEs were between eight and eleven percentage points more likely than ABs to say cost, health, and the arts not being of interest were the reasons for not attending/participation (more often).

Figure 22: Barriers to arts attendance / participation (%)

	All	Communities First		Social grade			
		CF area ¹⁴	Not CF area	AB	C1	C2	DE
It is difficult to find the time	38	33	39	43	45	37	30
It costs too much	23	25	22	18	20	20	29
Family commitments/childcare	21	25	19	22	20	19	22
There is nothing available near my home	18	17	18	15	19	18	18
There hasn't been anything I am interested in	17	16	18	16	17	18	18
The arts are just not for me	16	19	15	11	14	19	19
My health is not good enough / too old	14	16	13	10	11	14	18
Lack of access/facilities for disabled people	2	2	2	2	2	2	3
Lack of transport	1	1	1	1	1	0	1
Don't know what events are on	1	0	1	1	0	1	1
No one to go with / take me	0	0	1	1	0	0	0
I had a bad experience the last time I went	0	0	0	1	0	0	0
Other reason	2	1	2	3	2	1	1
None	2	2	3	4	2	2	2
Don't know	4	5	4	7	4	4	4
Base (all):	4,275	1,122	3,147	673	1,308	814	1,458

¹⁴ The most deprived communities in Wales, as defined by the Welsh Index of Multiple Deprivation 2011.

A few other notable sub-group differences were also apparent when analysing barriers to attendance/participation:

- Those in the North Wales Arts Council region were the most likely to say nothing was available near their home (27% compared with 18% overall), and that there 'hasn't been anything I am interested in' (24% compared with 17%).
- Males were slightly more likely to say there hadn't been anything of interest (20% compared with 14% of females) and were also slightly more likely to reveal a general lack of interest in the arts (20% compared with just 13% of females).
- Difficulty in finding time was most likely to be an issue for those aged 25 to 44 (a barrier for 50% of this age group), compared with just 17% of those aged 65 and over. The most prevalent barrier for older respondents aged 65+ was poor health / being too old (33%).
- Family commitments / childcare were most likely to be mentioned by those with dependent children - 45% of those with dependent children said family commitments were a barrier - a reason especially likely to be mentioned by those with young children (aged 0 to 4), among whom 58% said family commitments were a barrier.

7. Art forms attended

This section examines in detail the survey findings for individual art forms attended, profiling those attending each of sixteen different arts events and their reasons for going.

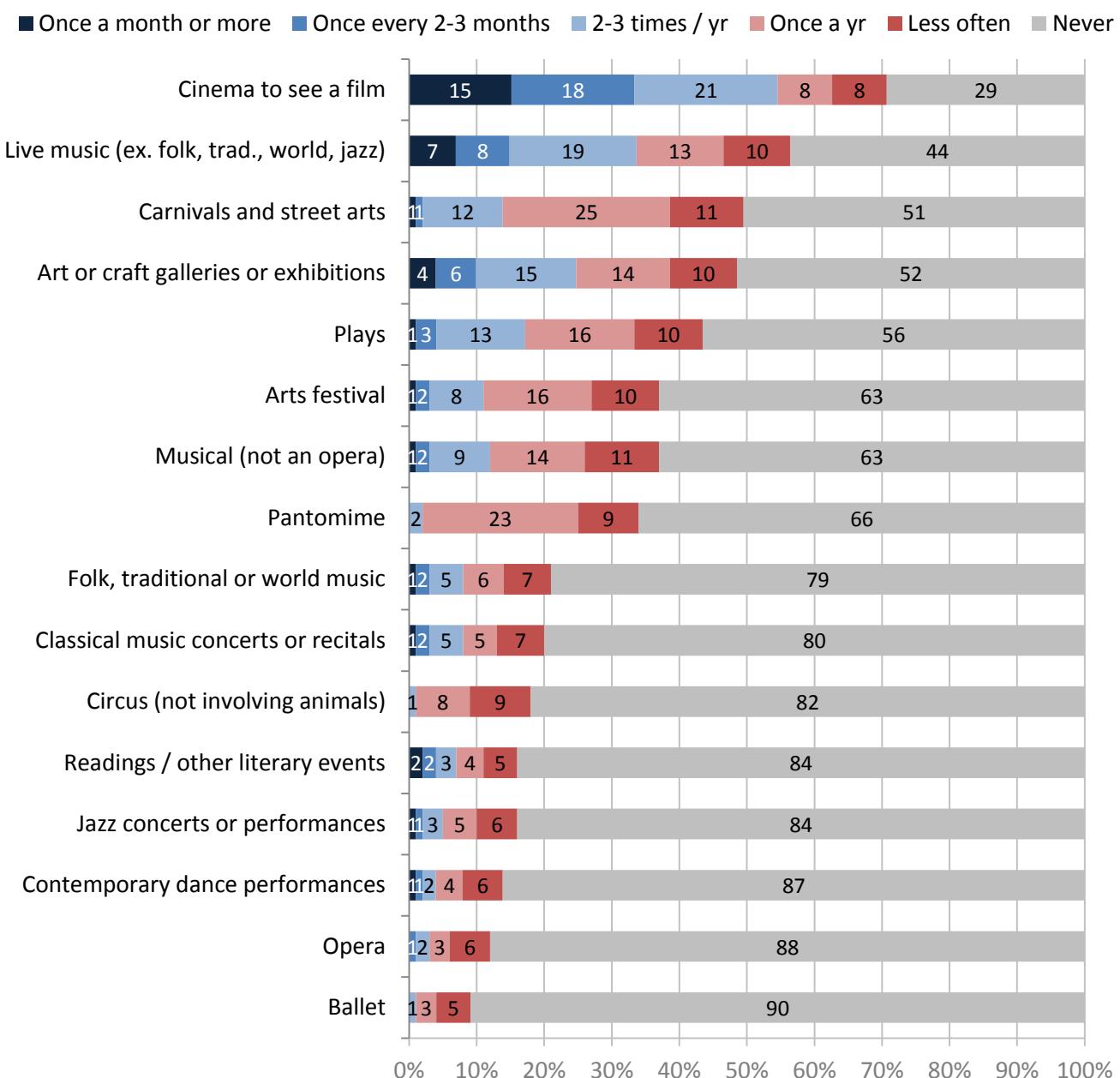
7.1 Frequency of arts event attendance

The arts activities most frequently attended were cinema and live music (excluding folk, traditional and world music), with 62% and 47% respectively attending at least once a year. Repeat attendance was also highest among cinema and live music attendees – More than half (54%) attended the cinema 2 to 3 times a year or more and 15% attended once a month or more, while more than a third (34%) attended live music 2 to 3 times a year or more and 7% attended once a month or more.

The next most popular arts events were art or craft galleries or exhibitions (25% attending 2 to 3 times a year or more), plays (17%) and carnivals and street arts (14%), followed by approximately one in ten attending musicals, arts festivals, folk and traditional or world music, classical music concerts or recitals, and readings / other literary events. One in twenty or fewer attended jazz concerts or performances, contemporary dance performances, opera, ballet, pantomimes and the circus 2 to 3 times a year or more.

Carnivals and street arts and pantomime in particular were most likely to be attended on an annual basis only (25% and 23% doing so respectively).

Figure 23: Frequency of arts event attendance – by individual art form (%)



Base: all respondents (4,275)

Frequency of attending individual art forms was relatively consistent between 2010 and 2015 surveys. The most notable exceptions being a three percentage point increase in the proportion attending carnivals and street arts 2 to 3 times a year or more often, and a three percentage point decrease for live music and musicals.

Comparing back with 2005 reveals an overall uplift in attendance, with cinema, art or craft galleries and exhibitions and live music in particular recording the largest increases in attendance since 2005.

Figure 24: % attending arts events 2 to 3 times a year or more often
– by individual art form (2005, 2010 & 2015 %)

	2005	2010	2015	Net change (2015 – 2010)
Attended any art form	66	76	73	-3
Cinema to see a film	46	55	54	-1
Live music (ex. folk, trad., world, jazz)	29	36	33	-3
Art or craft galleries or exhibitions	17	24	25	+1
Plays	17	18	17	-1
Carnivals and street arts	12	11	14	+3
Musical (not an opera)	12	15	12	-3
Arts festival	n/a	8	10	+2
Folk, traditional or world music	6	7	7	0
Classical music concerts or recitals	8	8	7	-1
Readings / other literary events	3	6	6	0
Jazz concerts or performances	5	5	5	0
Contemporary dance performances	3	4	3	-1
Pantomime	n/a	3	2	-1
Circus (not involving animals)	n/a	1	2	+1
Opera	3	3	2	-1
Ballet	2	2	1	-1
Base (all):	6,851.	7,083	4,275	

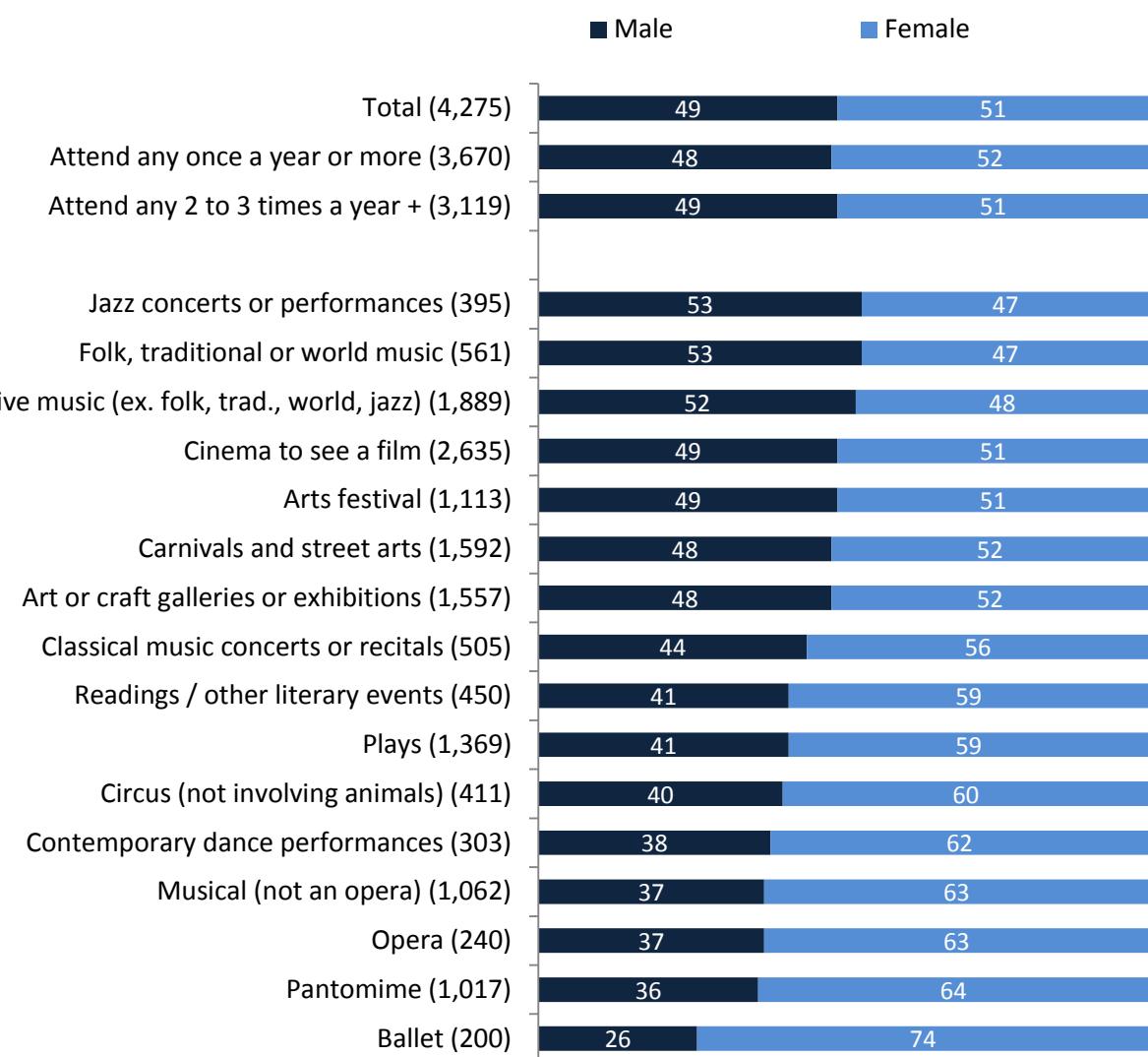
7.2 Demographic profile of art form attendees

The following section details the demographic profile of arts event attendees, based on those attending each event type at least once a year.

Gender by art form

Figure 25 shows the gender balance of those attending each arts event, compared with the overall profile. Although the gender balance of those attending any arts events once a year or more often is almost identical to the overall population profile, audiences of classical music concerts or recitals, literary events, plays, circuses, contemporary dance performances, musicals, opera, pantomimes, and ballet in particular, were more likely to be female. Music events including jazz, folk, traditional or world music or other live music had a slightly more male presence.

Figure 25: Profile of those attending arts events once a year or more often (by gender, %)

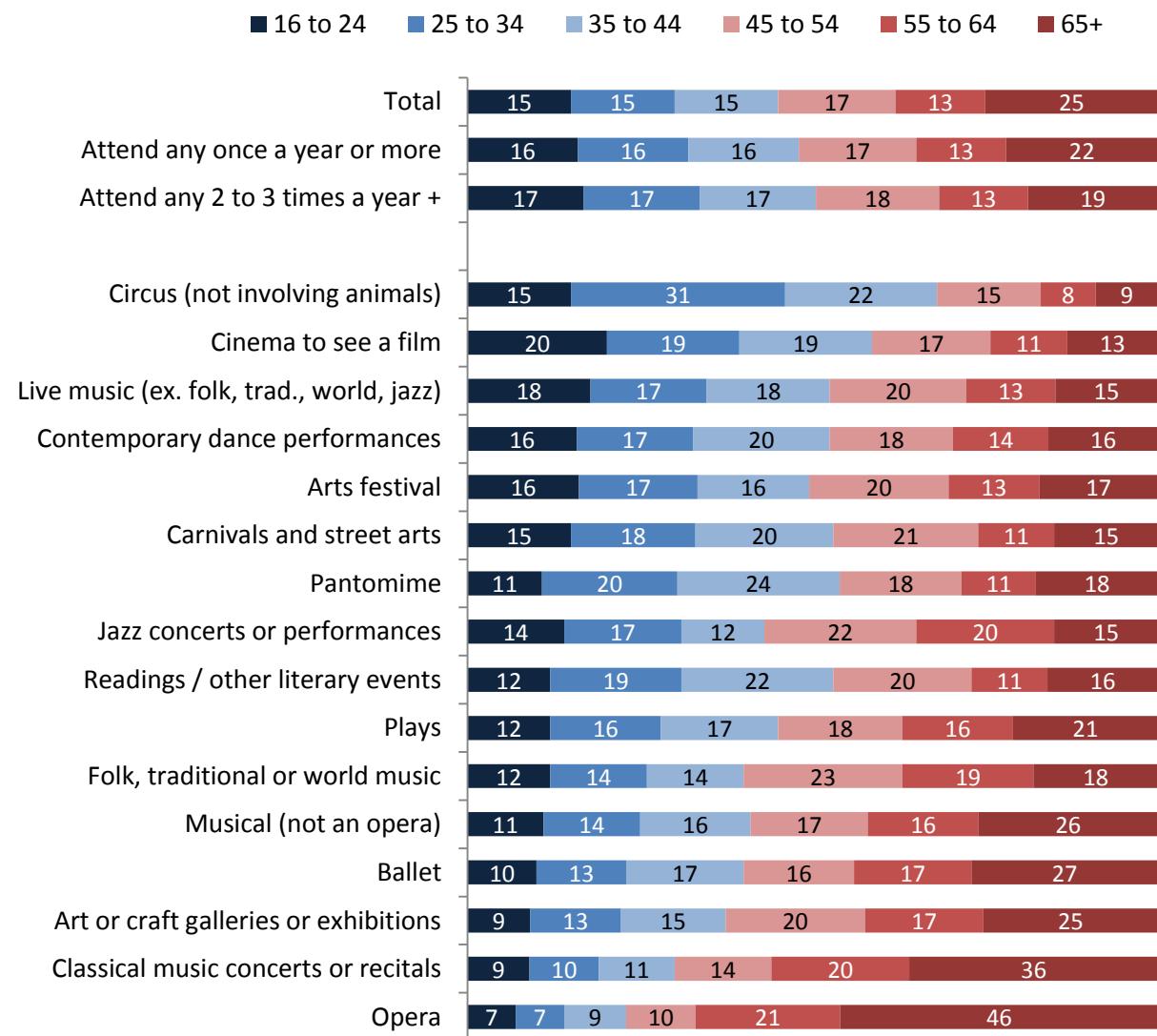


Bases shown in brackets (those attending each event once a year or more often)

Age by art form

In terms of age profile, the largest proportion of younger people were recorded for circus and cinema, where approximately four in ten or more (46% and 39% respectively) of those attending at least once a year or more were aged between 16 and 34. Classical music and opera attendees were most likely to be in older age categories – more than half (56% and 67% respectively) of these audiences were aged 55 or over.

Figure 26: Profile of those attending arts events once a year or more often (by age, %)

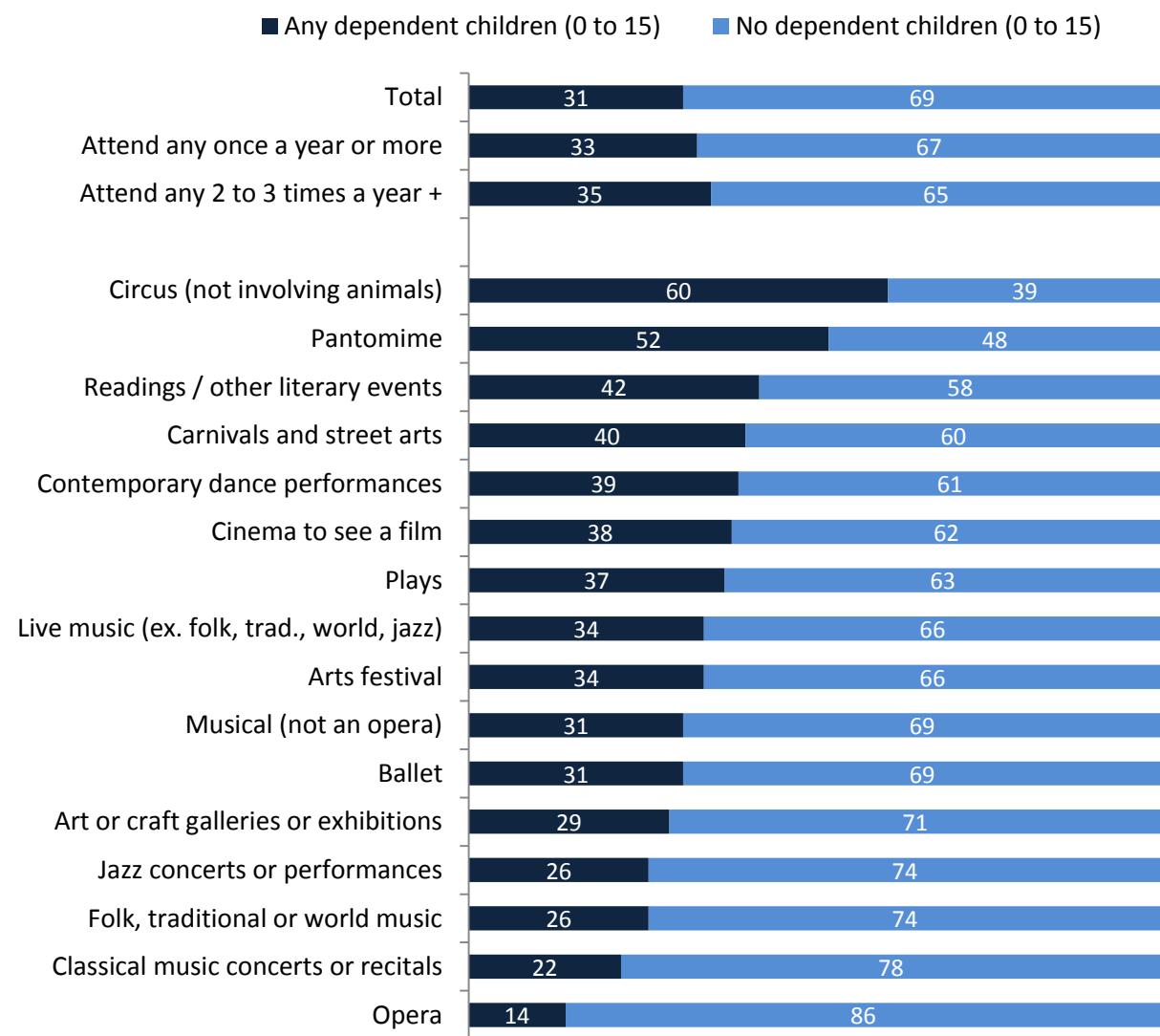


Base: those attending each event once a year or more often

Presence of dependent children among attendees – by art form

More than half of those attending circuses (60%) and pantomimes (52%) annually had dependent children up to the age of 15, compared with an overall population average of 31%. Jazz, folk and traditional or world music, classical music, and opera attendees in particular, were the least likely to have dependent children.

Figure 27: Profile of those attending arts events once a year or more often
(by participants with/without dependent children, %)

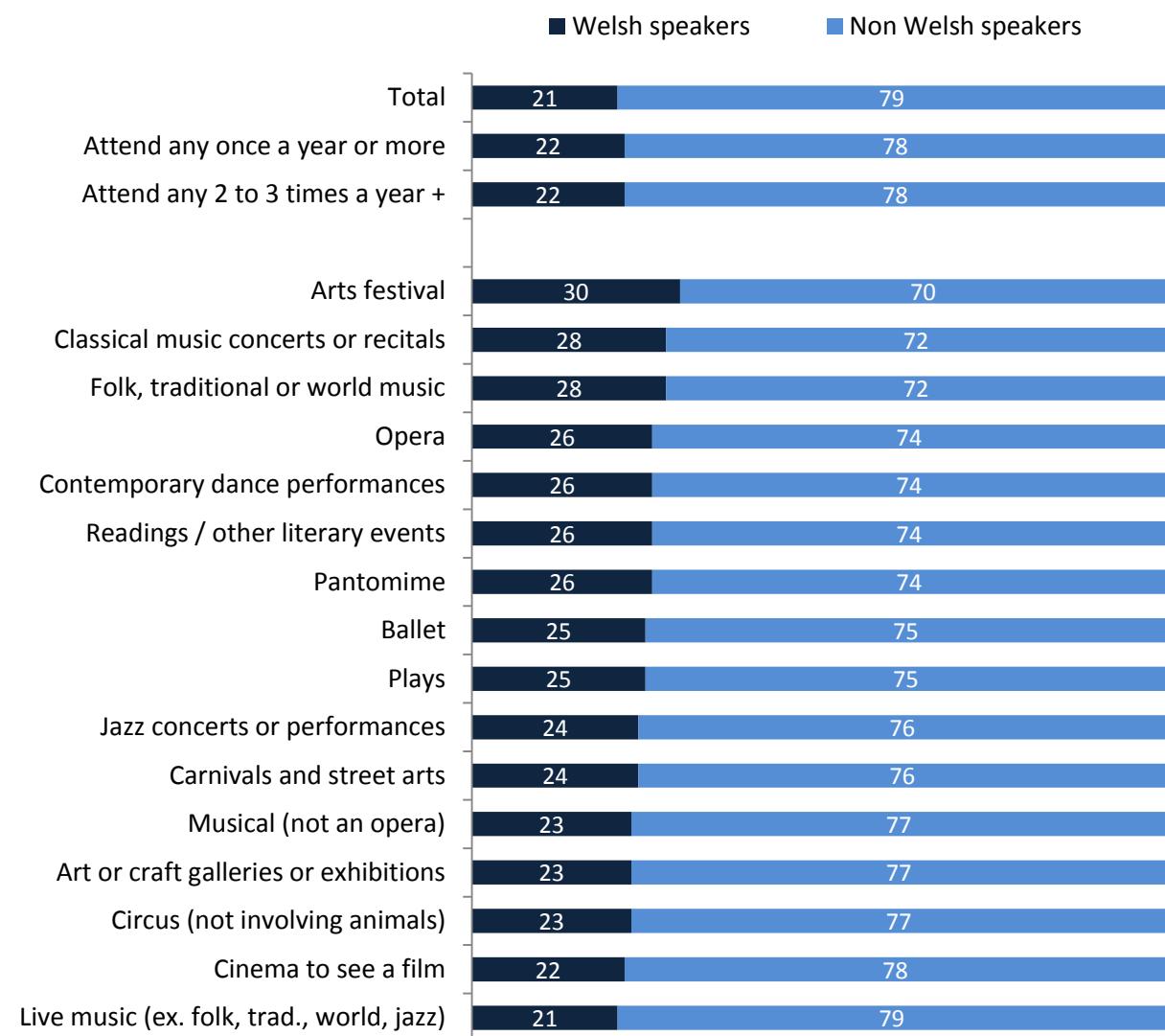


Base: those attending each event once a year or more often

Ability to speak Welsh by art form

Attendees of numerous arts events were more likely to be Welsh speakers than the population average, particularly in the case of arts festivals (e.g. music, literature, drama, dance or an eisteddfod), classical music concerts or recitals and folk, traditional or world music events.

Figure 28: Profile of those attending arts events once a year or more often
(by ability to speak Welsh, %)



Base: those attending each event once a year or more often

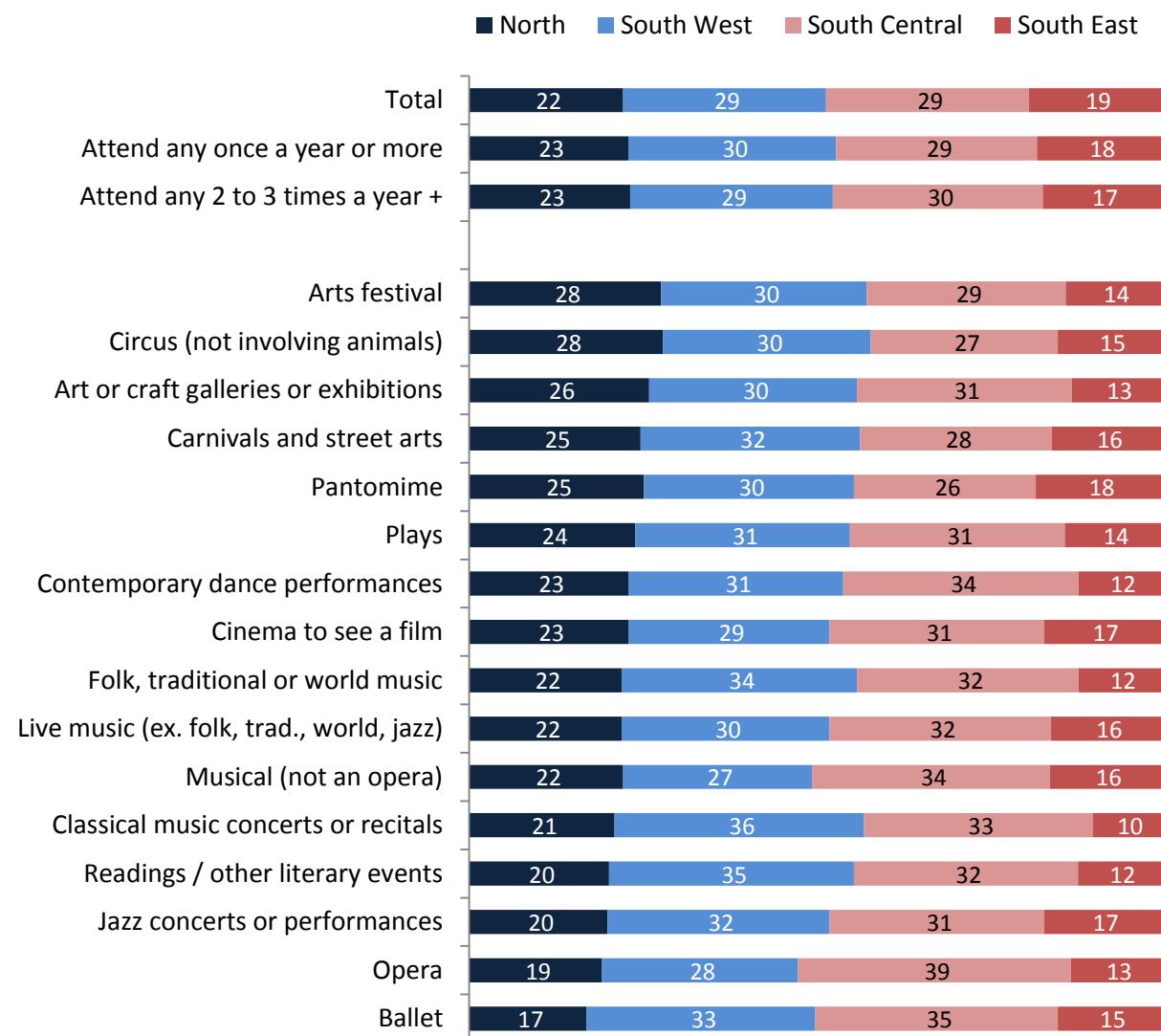
ACW region by art form

Some regional variation in the profile of art form attendees was also apparent.

Most notably these were:

- Arts festival and circus attendees being relatively more likely to be attended by those in the North Wales Arts Council region.
- Classical music and literary events being most likely to be attended by those in the South West.
- South Central region residents being most likely to be the attendees of opera, ballet, contemporary dance and musicals.

Figure 29: Profile of those attending arts events once a year or more often
(by Arts Council of Wales region, %)

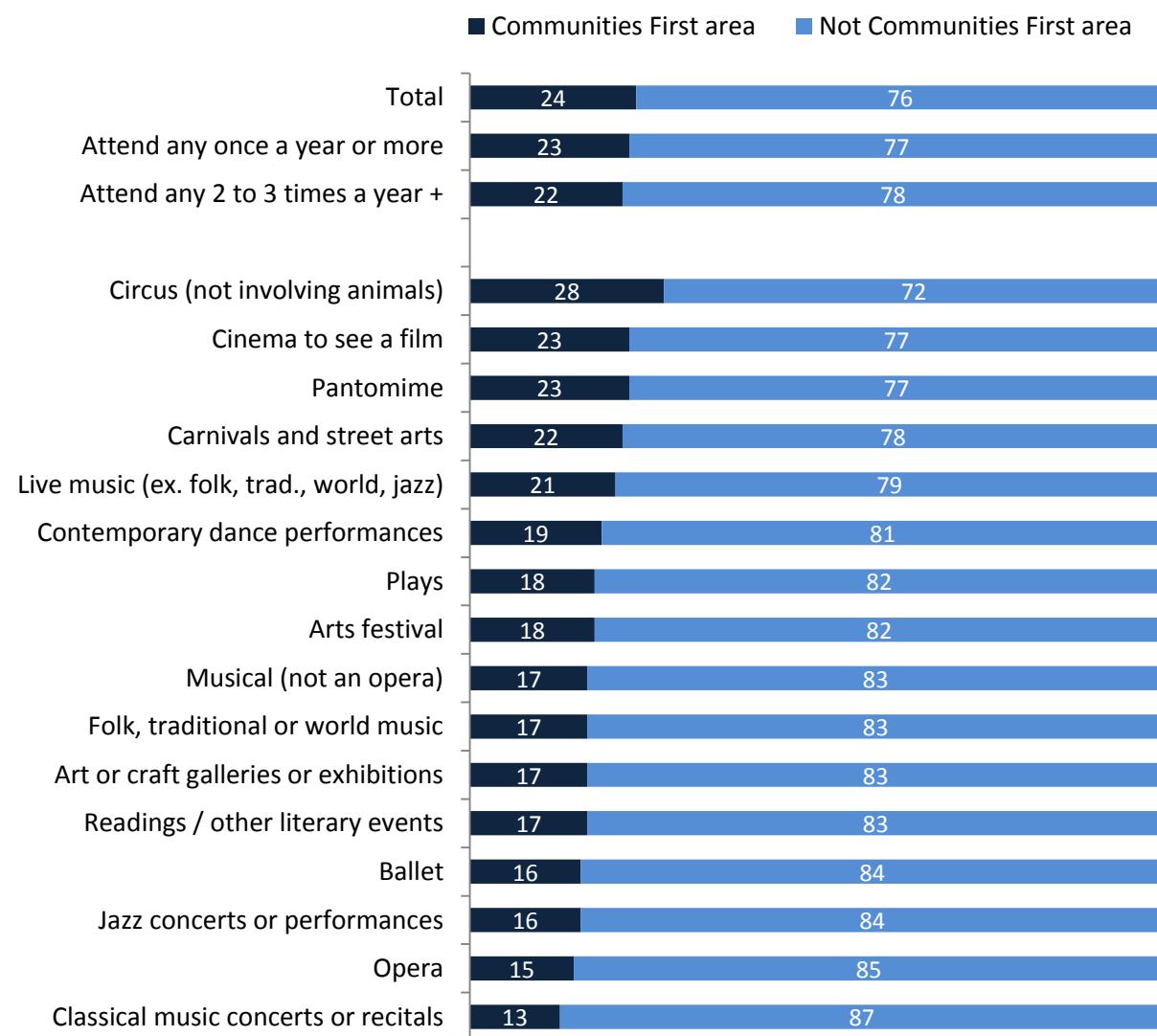


Base: those attending each event once a year or more often

Communities First area/not by art form

Approaching three in ten (28%) of those attending circuses once a year or more were from Communities First areas (compared with a population average of 24%). This was the only event where this group were over-represented, however, with the audiences for ballet, jazz, opera and classical music in particular being less likely to feature those from Communities First areas.

Figure 30: Profile of those attending arts events once a year or more often
(by Communities First / non Communities First areas, %)

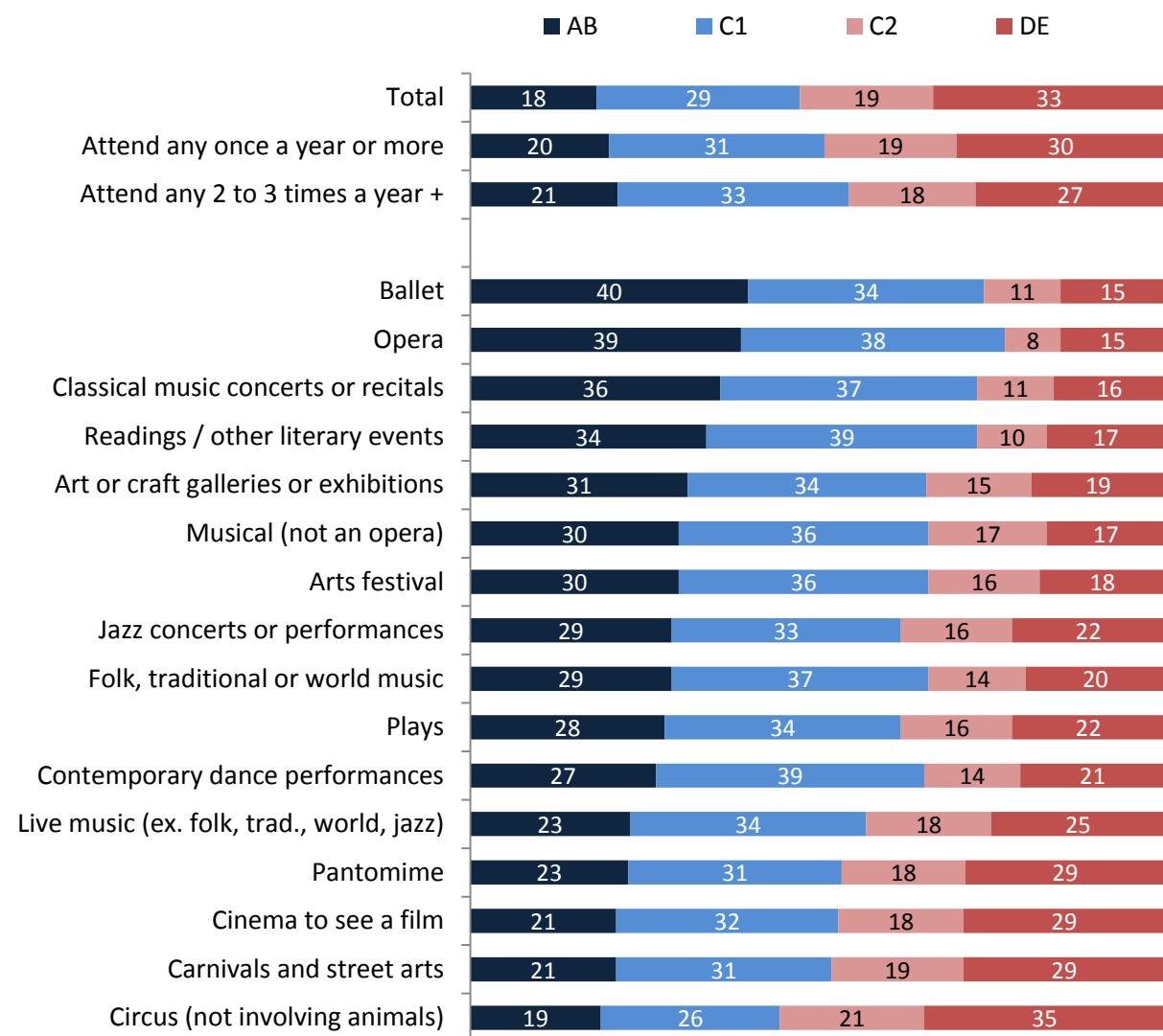


Base: those attending each event once a year or more often

Social grade by art form

Variation in the social grade profile of attendees existed by individual art form - Ballet, opera and classical music appealed the most to the highest AB social grades, while the highest proportion of DEs were attendees at pantomimes, cinema, carnivals and circuses. It was only in circus audiences, however, where DEs are over-represented in comparison to the general population profile.

Figure 31: Profile of those attending arts events once a year or more often (by social grade, %)

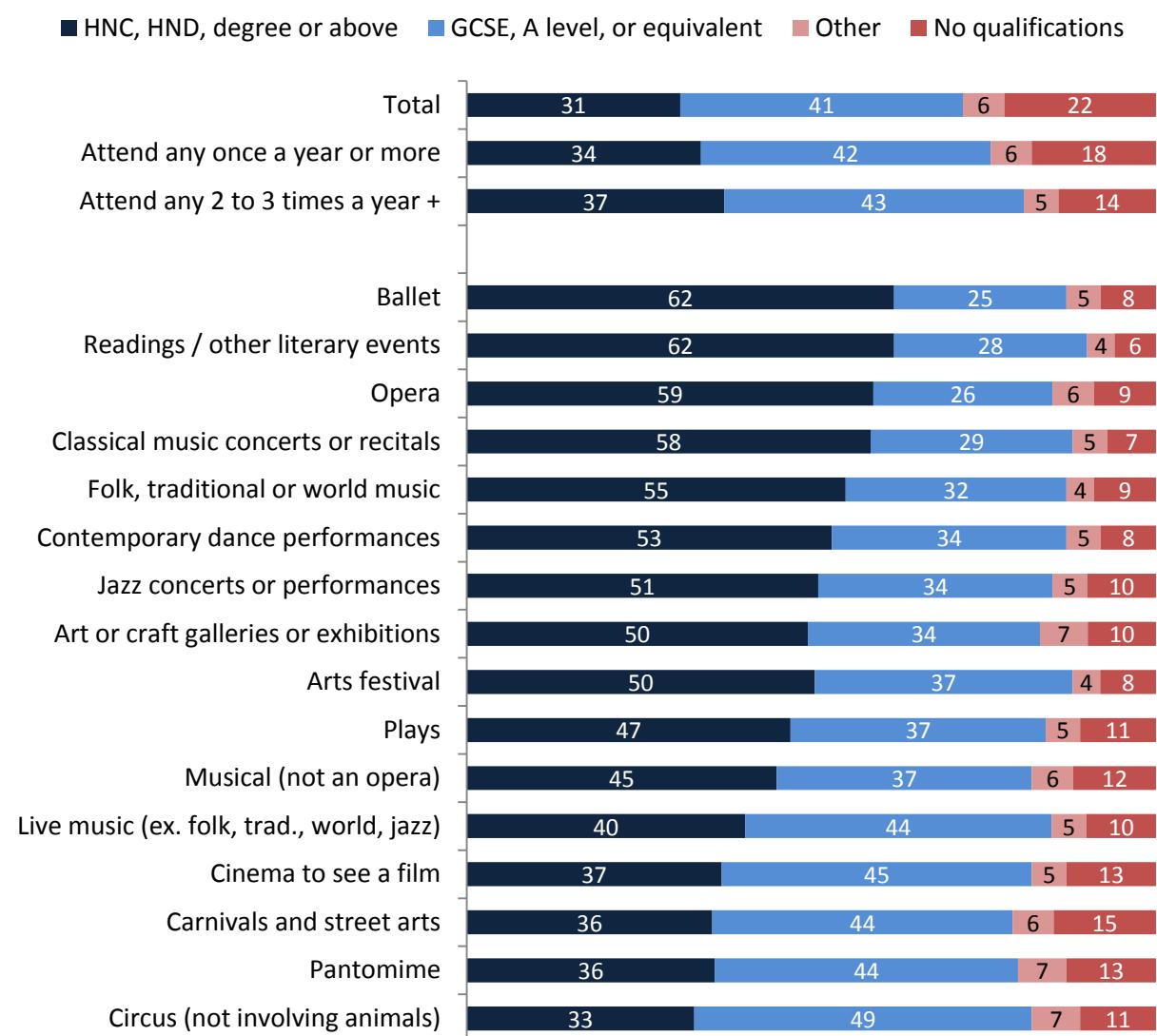


Base: those attending each event once a year or more often

Highest educational qualification by art form

The profile of attendees was particularly varied when looking at the highest educational qualification of attendees. Approximately three fifths of ballet, readings and literary event, opera and classical music event attendees had qualifications of HNC, HND, and degree level or above. While a larger proportion of those attending the cinema, carnivals and street arts, pantomimes and circuses had highest qualifications of GCSE, A level or equivalent. Those without qualifications were less likely to attend any individual arts event in comparison to their incidence in the general population.

Figure 32: Profile of those attending arts events once a year or more often
(by highest educational qualification, %)

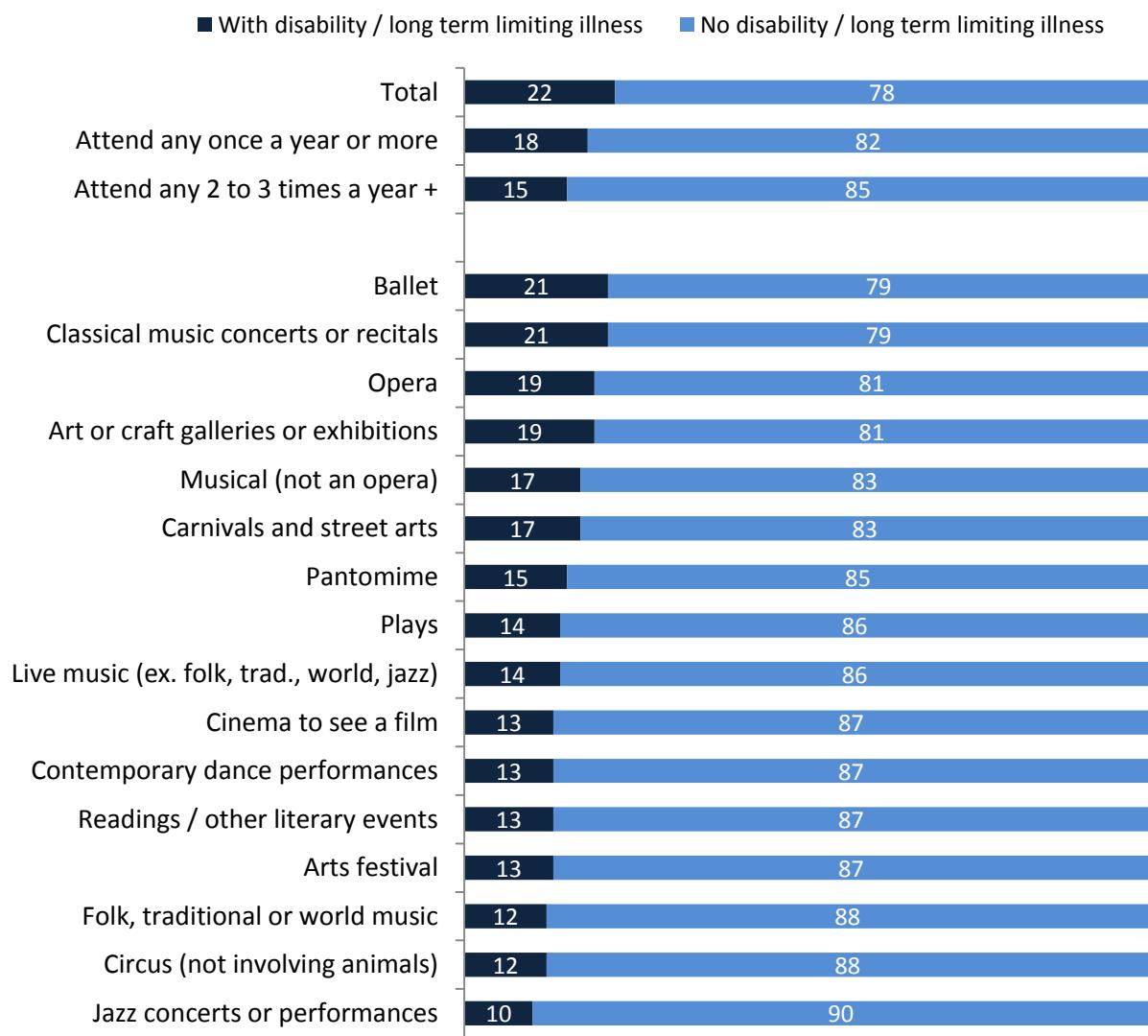


Base: those attending each event once a year or more often

Disability by art form

Those with a disability or long term limiting illness were generally less likely to be (frequent) attendees of arts events; however a comparable proportion to the population average attended ballet and classical music arts events once a year or more. None the less, the profile of numerous other arts activities contained relatively fewer people with a disability or long term limiting illness (see figure 33).

Figure 33: Profile of those attending arts events once a year or more often
(those with disability / long term limiting illness, %)

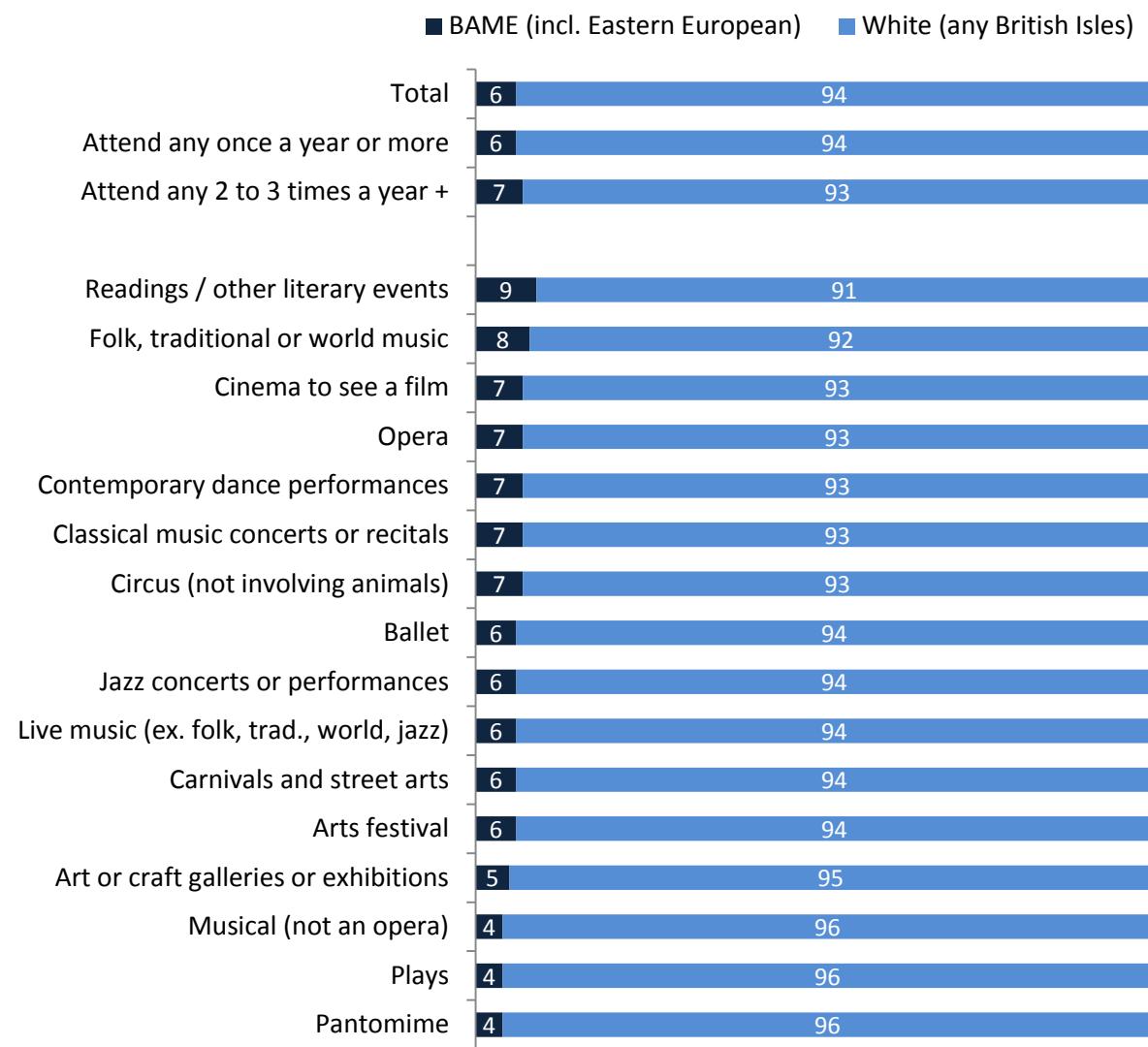


Base: those attending each event once a year or more often

Ethnicity (BAME inc. Eastern European) by art form

Approaching one in ten of those attending readings / other literary events and folk, traditional or world music were from BAME (inc. Eastern European) ethnic groups, while fewer than one in twenty musical, play and pantomime attendees were from these groups.

Figure 34: Profile of those attending arts events once a year or more often
(by ethnicity - BAME and Eastern European groups, %)



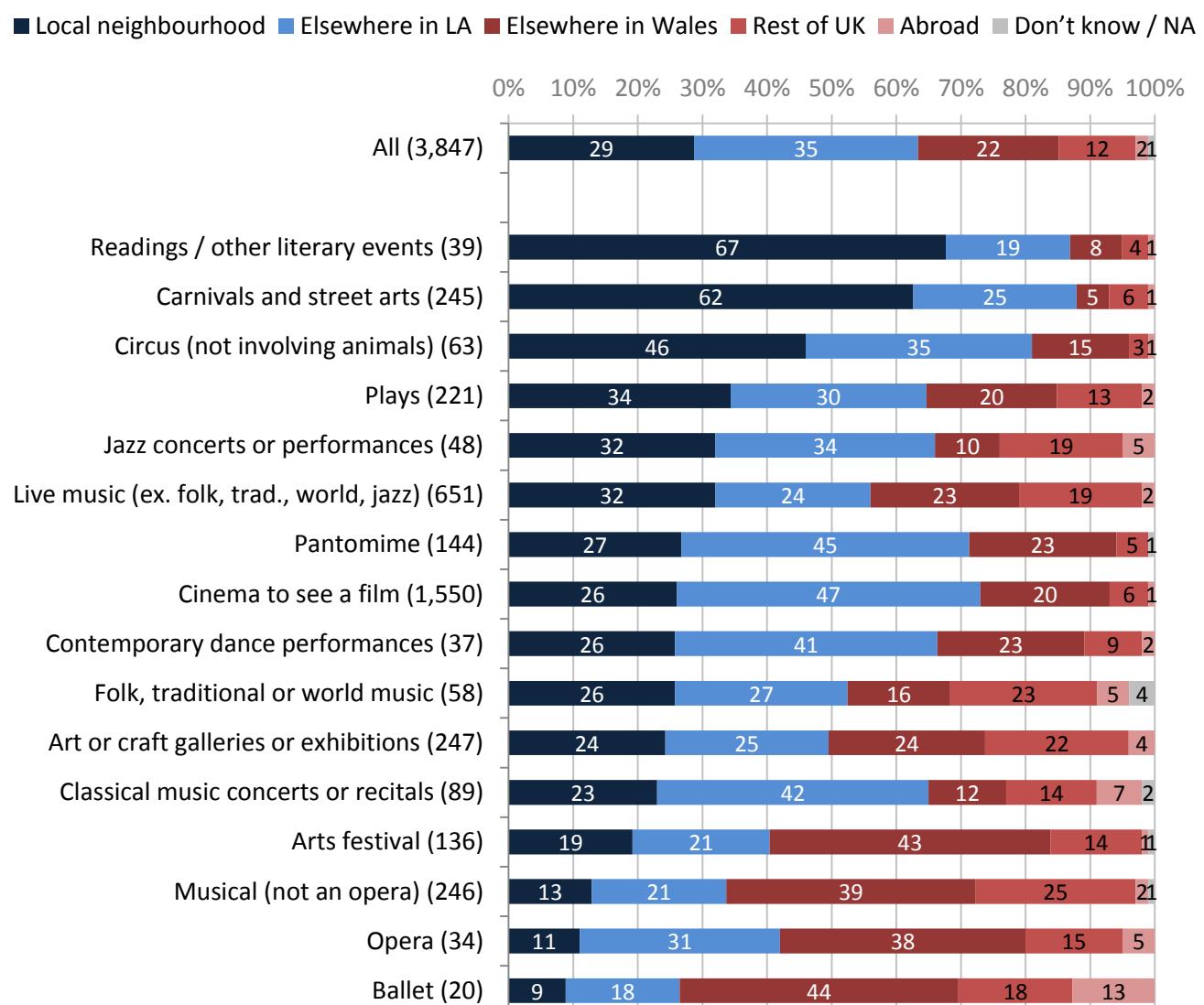
Base: those attending each event once a year or more often

7.3 Location of most recent arts event attended

Participants were asked where they had attended the most recent arts activity they had been to. Differences in the proximity of event location were particularly marked when comparing different arts activities.

Readings and carnivals/street arts were particularly likely to have been attended in participants' local neighbourhoods. Pantomimes, cinema, classical music and contemporary dance performances were all most likely to be attended elsewhere within participants own local authorities. Ballet, arts festivals, musicals and operas were the most likely to be attended further afield (beyond their own local authority) - Musicals in particular were the activity most likely to be attended outside Wales (27% doing so on the last occasion).

Figure 35: Location of most recent arts event attended (%)



Bases shown in brackets (arts event most recently attended)

7.4 Reasons for attending

The reasons for attending arts events, based on the most recent arts event attended, is summarised in figure 36 overleaf.

The desire to see a specific show or event and for entertainment were the most prevalent reasons (each given by approximately four in ten). Social aspects or a night out and general appeal of the event/art form ('I like going to that type of event') were the next most common reasons (given by 31% and 26% respectively), followed by going to see a specific performer, artist or company (20%). Accompanying children was a reason given by more than one in ten (13%), as was an invitation from someone else (11%).

Reasons for attending varied by art form (see figure 34), with a few notable differences highlighted below:

- Accompanying children was the most common reason for attending circuses and pantomimes – a reason given by more than half (64% and 52% respectively) of those attending these arts events most recently.
- Accompanying children was also a common reason for attending readings / other literary events, for 36% of attendees, which was second only to general entertainment / enjoyment (45%).
- The desire to see a specific performer, artist or company was the most common reason for attending classical music concerts or events (45%) and was also the joint most common reason among live music attendees - also 45%, which was on a par with the social appeal ('social event or night out') for live music attendees. This social aspect was also important to jazz concert or performance attendees (the most common reason with 46% mentioning).
- The involvement of a relative or friend was the reason most likely to be given for attending a contemporary dance performance on the last occasion (47%).
- Although not the most frequently mentioned reason for attending carnivals and readings / other literary events, the feeling of community ('helps me to feel part of a community') was most likely to be mentioned by attendees of these events (25% and 30% mentioning as a reason respectively).

Figure 36 Reasons for attending most recent event attended (%. Top two mentions in bold)

	All (3,847)	Opera (34)	Musical (246)	Cinema (1,550)	Plays (221)	Ballet (20)	Arts festival (136)	Pantomime (144)	Classical music concerts or recitals (89)
(1 of 2):									
To see a specific show or event	42	65	59	54	48	43	36	35	34
For entertainment\enjoyment	37	51	40	36	31	40	37	29	33
Social event or night out	31	36	37	35	29	10	17	21	25
Like going to that type of event	26	56	29	20	28	20	40	23	29
To see a specific performer, artist or company	20	44	16	10	24	24	21	13	45
Accompanying children	13	-	9	14	11	3	18	52	1
Invited to go by someone else	11	26	17	11	9	4	11	7	10
Recommended by a friend or relative	9	14	10	9	9	-	10	4	5
A relative or friend was involved in the event	8	10	10	3	11	8	17	4	15
Special occasion\celebration	7	6	15	5	6	14	5	7	12
Helps me to feel part of a community	7	12	3	3	8	5	11	6	15
Happened to be passing by \ in area	2	4	-	1	2	-	5	-	1
Connected with work or studies	2	3	1	1	2	-	6	2	-
Attending arts events is a boost to my health	2	3	1	1	2	-	3	1	6
(2 of 2):									
	All (3,847)	Circus (63)	Jazz concerts or performances (48)	Live music (651)	Folk, traditional or world music (58)	Carnivals and street arts (245)	Art or craft galleries or exhibitions (247)	Contemporary dance (37)	Readings / other literary events (39)
To see a specific show or event	42	29	29	27	25	25	25	25	13
For entertainment\enjoyment	37	39	38	41	54	43	33	24	45
Social event or night out	31	10	46	45	38	18	10	13	16
Like going to that type of event	26	10	38	30	26	29	32	16	26
To see a specific performer, artist or company	20	4	33	45	40	3	17	41	13
Accompanying children	13	64	2	4	-	21	8	8	36
Invited to go by someone else	11	4	10	11	18	10	11	9	7
Recommended by a friend or relative	9	1	10	11	13	5	8	12	13
A relative or friend was involved in the event	8	2	17	9	11	14	11	47	15
Special occasion\celebration	7	7	9	8	13	9	6	-	3
Helps me to feel part of a community	7	6	3	9	7	25	7	9	30
Happened to be passing by \ in area	2	-	6	2	3	6	14	-	2
Connected with work or studies	2	-	5	3	2	2	10	3	7
Attending arts events is a boost to my health	2	4	6	2	-	4	2	-	-

Bases shown in brackets (arts event most recently attended)

8. Art form participation

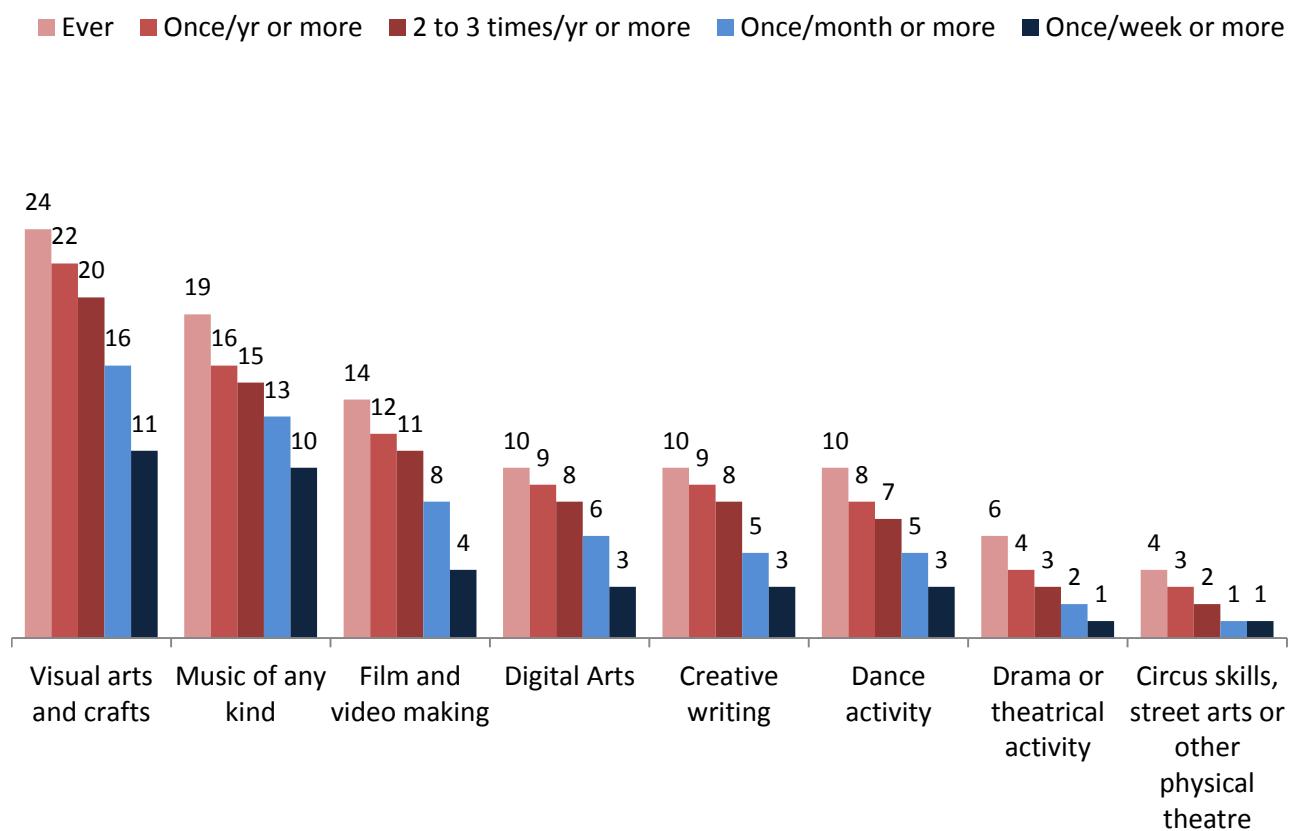
This section reports on the frequency of *participation* in each of eight individual art forms, drawing comparisons with previous survey findings, profiling those participating in each art form, as well as examining their motivations for taking part.

8.1 Frequency of art form participation

Figure 37 shows the frequency of participation in individual art forms. Visual arts and crafts and music were most frequently participated in (24% and 19% 'ever' doing so respectively). 14% ever participated in film and video making, and one in ten (10%) ever participated in each of digital arts, creative writing and dance activity of any kind. Fewer (6%), ever participated in drama or theatrical activity and circus skills, street arts or other physical theatre (4%).

Half or more of those ever participating in the majority of art forms (including visual arts and crafts, music of any kind, film and video making, digital arts, creative writing and dance activity) did so relatively frequently - at least once a month or more often.

Figure 37: Frequency of arts participation – by individual art form (%)



Base: all respondents (4,275)

In addition to recording the frequency of participation in digital arts (9% did so at least annually), the survey also explored *consumption* of the arts in digital form, which revealed three in ten (30%) had purchased music via digital download within the last year, 29% had purchased a film or TV Drama via a digital download, almost a quarter (24%) had purchased a book of fiction or poetry via a digital download and 16% had visited a website to view or download an online arts collection or arts performance.

Reflecting an overall increase in arts participation, participation in all bar one of the individual art forms (which could be compared with 2010) showed an increase in participation 2 to 3 times a year or more often - most notably for film and video making which increased four percentage points from 7% in 2010 to 11% in 2015. The only art form to show a decline in participation was dance – from 11% in 2010 to 7% in 2015.

Comparing further back, with 2005, reveals an overall uplift in attendance for all comparable art forms, with film and video making, and visual arts and crafts again recording the largest increases in attendance since 2005.

Figure 38: % participating in arts activities 2 to 3 times a year or more often
– by individual art form (2005, 2010 & 2015 %)

	2005	2010	2015	Net change (2015 – 2010)
Participate in any art form	19	37	41	+4
Visual arts and crafts	9	17	20	+3
Music of any kind	8	13	15	+2
Film and video making	3	7	11	+4
Digital Arts	n/a	n/a	8	n/a
Creative writing	3	7	8	+1
Dance activity	4	11	7	-4
Drama or theatrical activity	2	2	3	+1
Circus skills, street arts or other physical theatre	n/a	1	2	+1
Base (all):	6,851.	7,083	4,275	

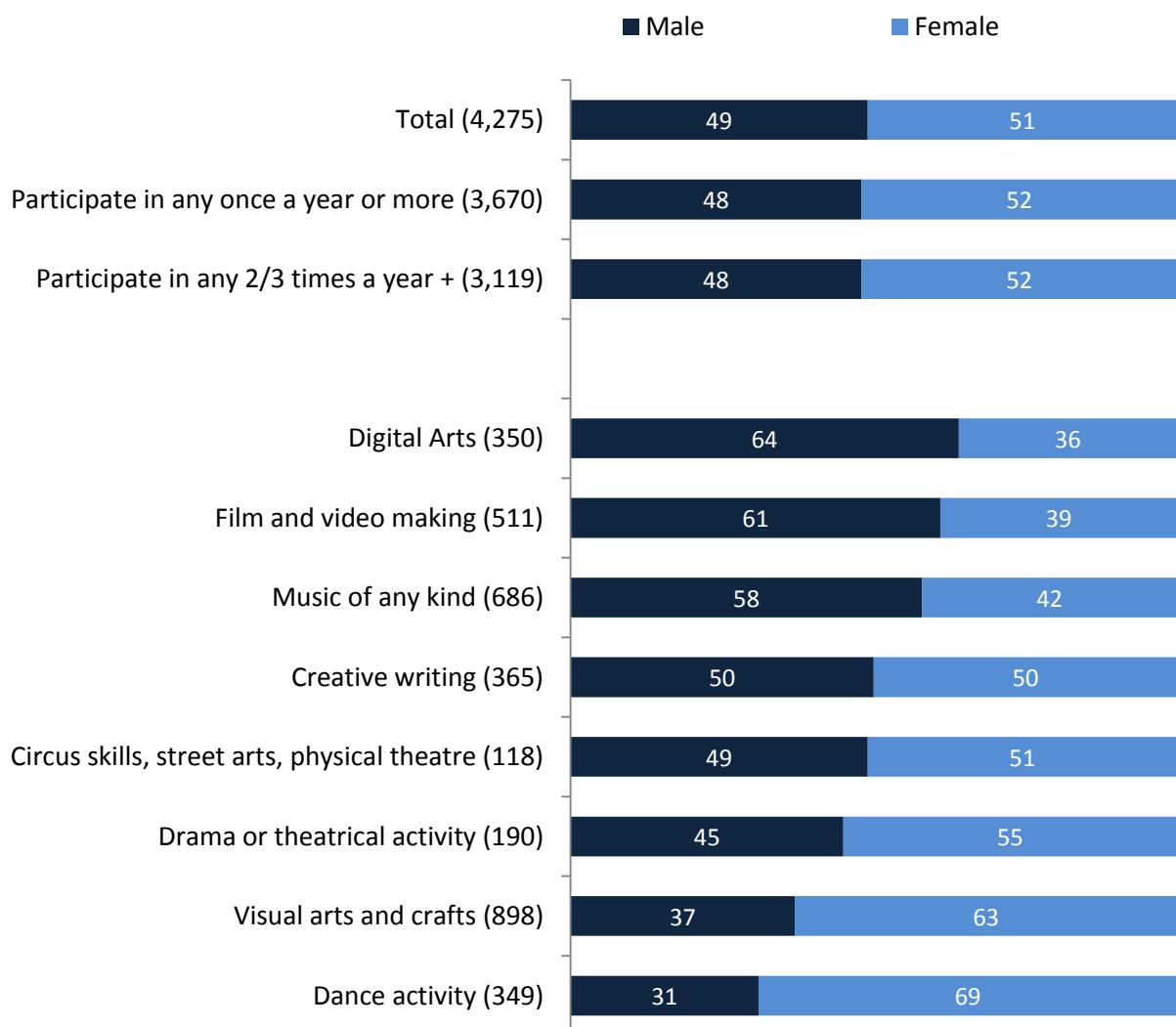
8.2 Demographic profile of art form participants

This section provides an overview of the demographic profile of those participating in individual art forms.

Gender by art form

As can be seen in figure 39, and as discussed previously (see section 5.2), at an overall participation level (those participating in any arts forms) there is a relatively balanced gender profile (48% male, 52% female). However at an individual art form level, greater variation exists - Digital arts, film and video making and music are all more likely to have male participants than females (64%, 61% and 58% of participants were male). Creative writing, circus skills, street arts and physical theatre were almost equally balanced, while drama/theatrical activity, visual arts and craft and dance participants in particular were more likely to be female (55%, 63% and 69% female respectively).

Figure 39: Profile of those participating in arts activities once a year or more often (by gender, %)

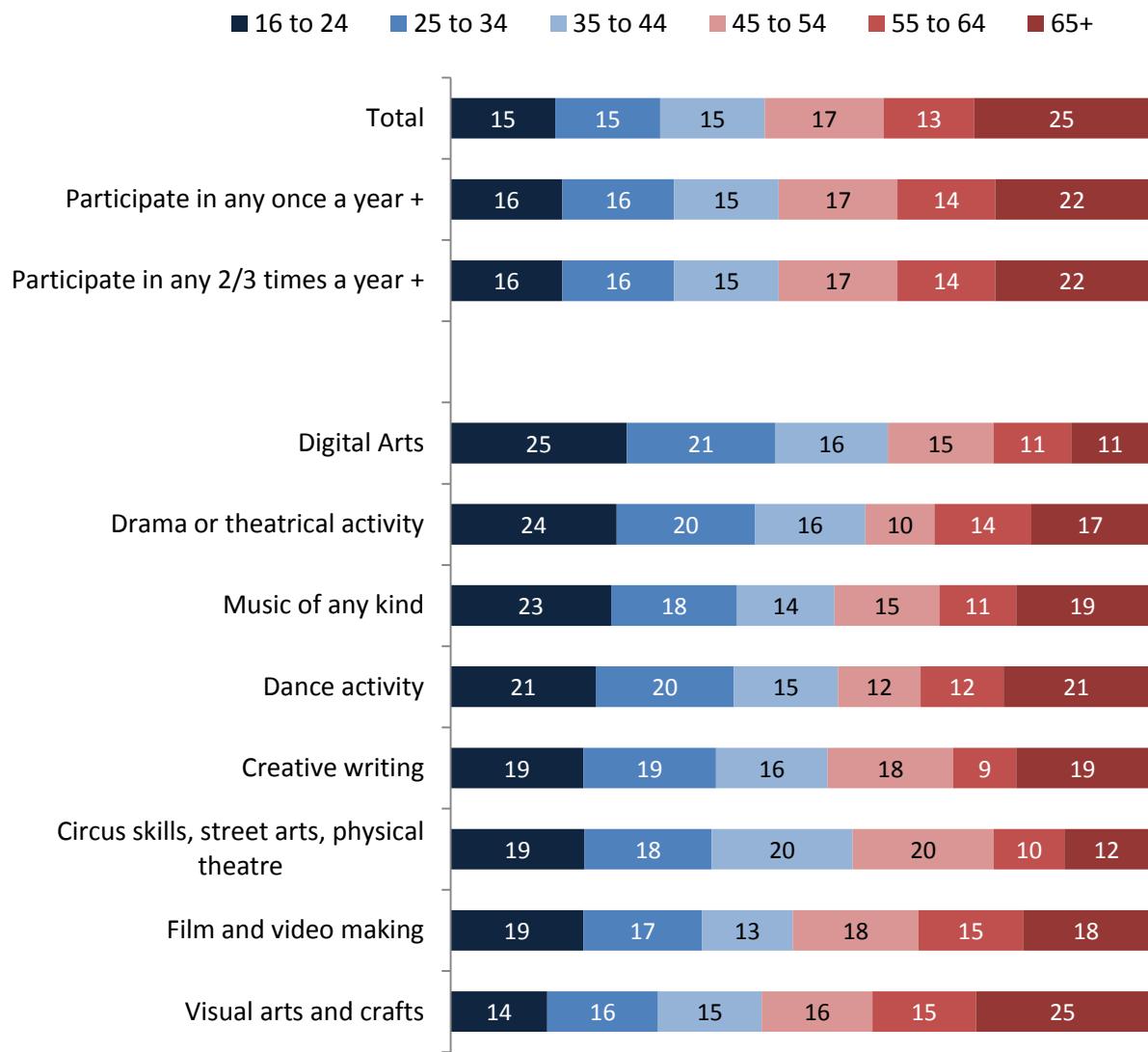


Bases shown in brackets (those participating in each activity once a year or more often)

Age by art form

The digital arts, drama/theatrical activity, music and dance attracted the highest proportion of younger people - at least two fifths of those participating in these activities were under 35. Those taking part in circus skills, street arts or other physical theatre were most likely to be in the 35 to 54 age category (40%), while visual arts and crafts participants were most likely to be 55 or over (40%).

Figure 40: Profile of those participating in arts activities once a year or more often (by age, %)

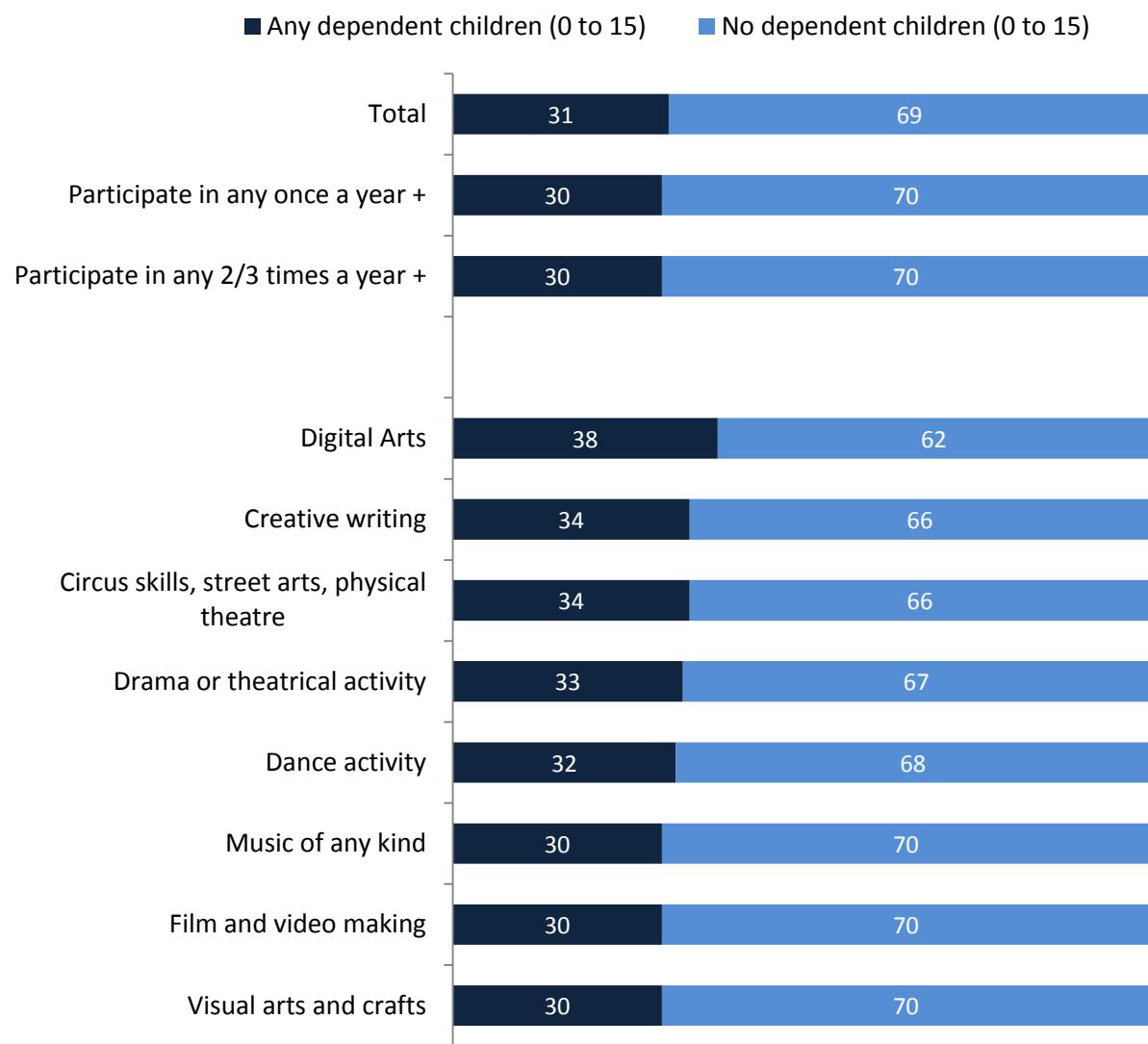


Base: those participating in each activity once a year or more often

Presence of dependent children among attendees – by art form

Few significant differences existed in terms of the proportion of different art form participants having dependent children; however those involved in the digital arts were more likely to have dependent children than the overall average.

Figure 41: Profile of those participating in arts activities once a year or more often (by participants with/without dependent children, %)

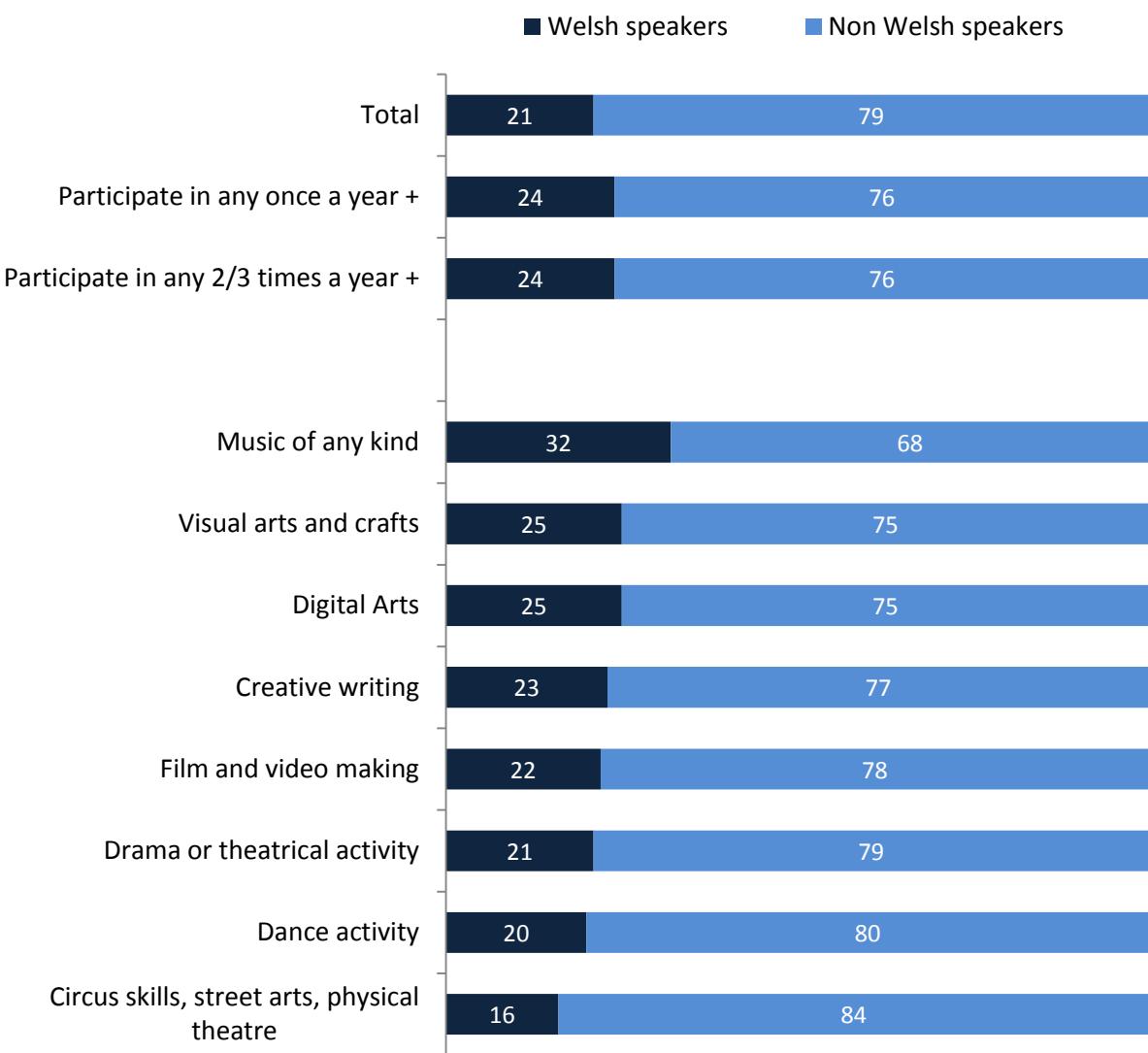


Base: those participating in each activity once a year or more often

Ability to speak Welsh by art form

Almost a third (32%) of those taking part in musical activity were able to speak Welsh, compared with 21% of the population in Wales. Fewer (16%), of those taking part in circus skills, street arts or other physical theatre were Welsh speakers.

Figure 42: Profile of those participating in arts activities once a year or more often (by ability to speak Welsh, %)



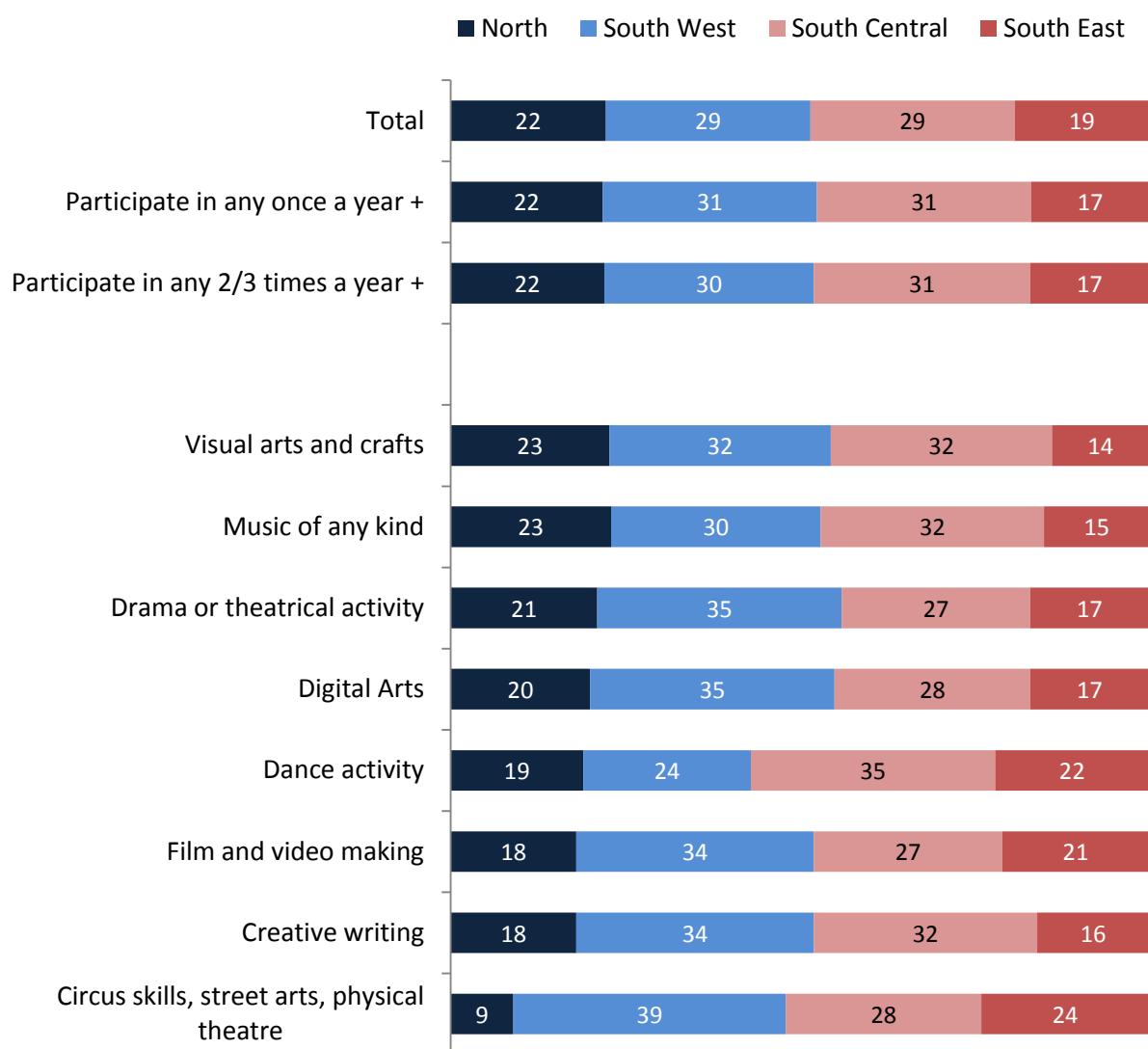
Base: those participating in each activity once a year or more often

ACW region by art form

Notable variations in the regional profile of art for attendees, included:

- Those living in South West Wales, relative to their incidence in the population overall, were over-represented in a number of participatory art forms - circus skills / street arts / physical theatre, drama / theatrical activity, and digital arts in particular. Participants of dance activity were more likely to come from the South Central region in comparison to population size.
- Relative to their population size, those living in the South East region were more likely to take part in circus skills, street arts and other physical theatre whereas this activity was less prevalent in the North region

Figure 43: Profile of those participating in arts activities once a year or more often
(by Arts Council of Wales region, %)

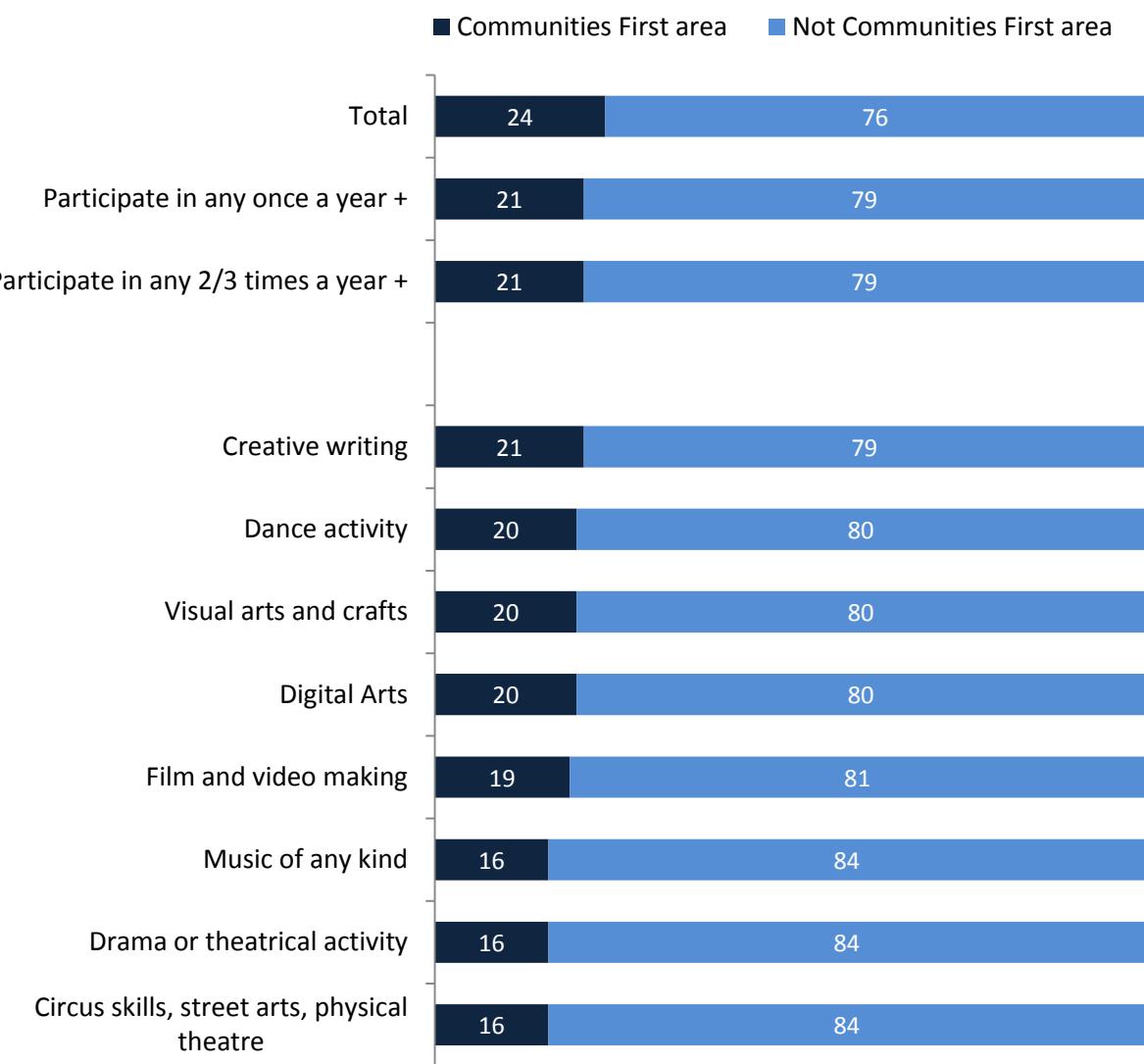


Base: those participating in each activity once a year or more often

Communities First area/not by art form

At an overall level, participation in the arts was generally lower in Communities First Areas and this was particularly apparent for music, drama and circus skills / street arts / physical theatre participation.

Figure 44: Profile of those participating in arts activities once a year or more often
(by Communities First / non Communities First areas, %)

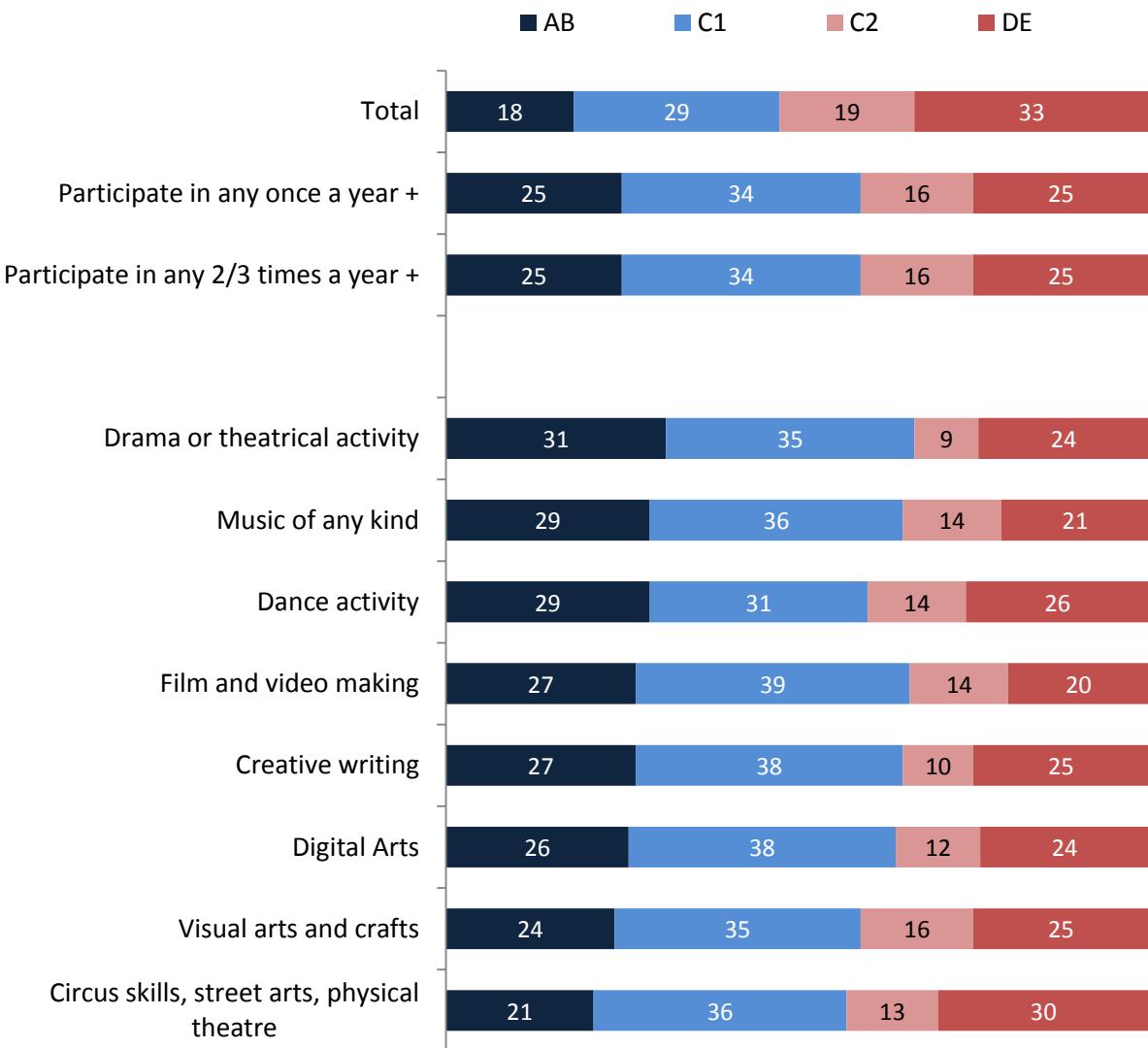


Base: those participating in each activity once a year or more often

Social grade by art form

Higher social grades were general more likely to participate in arts activity and this was particularly evident for some individual arts activities. - The highest proportion of ABs participated in drama, music or dance activities and C1s were particularly likely to be film and video making, creative writing and digital arts participants. The highest proportion of DEs participated in circus skills / street arts / physical theatre and dance activity, yet they were still underrepresented relative to their proportion of the overall population.

Figure 45: Profile of those participating in arts activities once/yr or more often (by social grade, %)

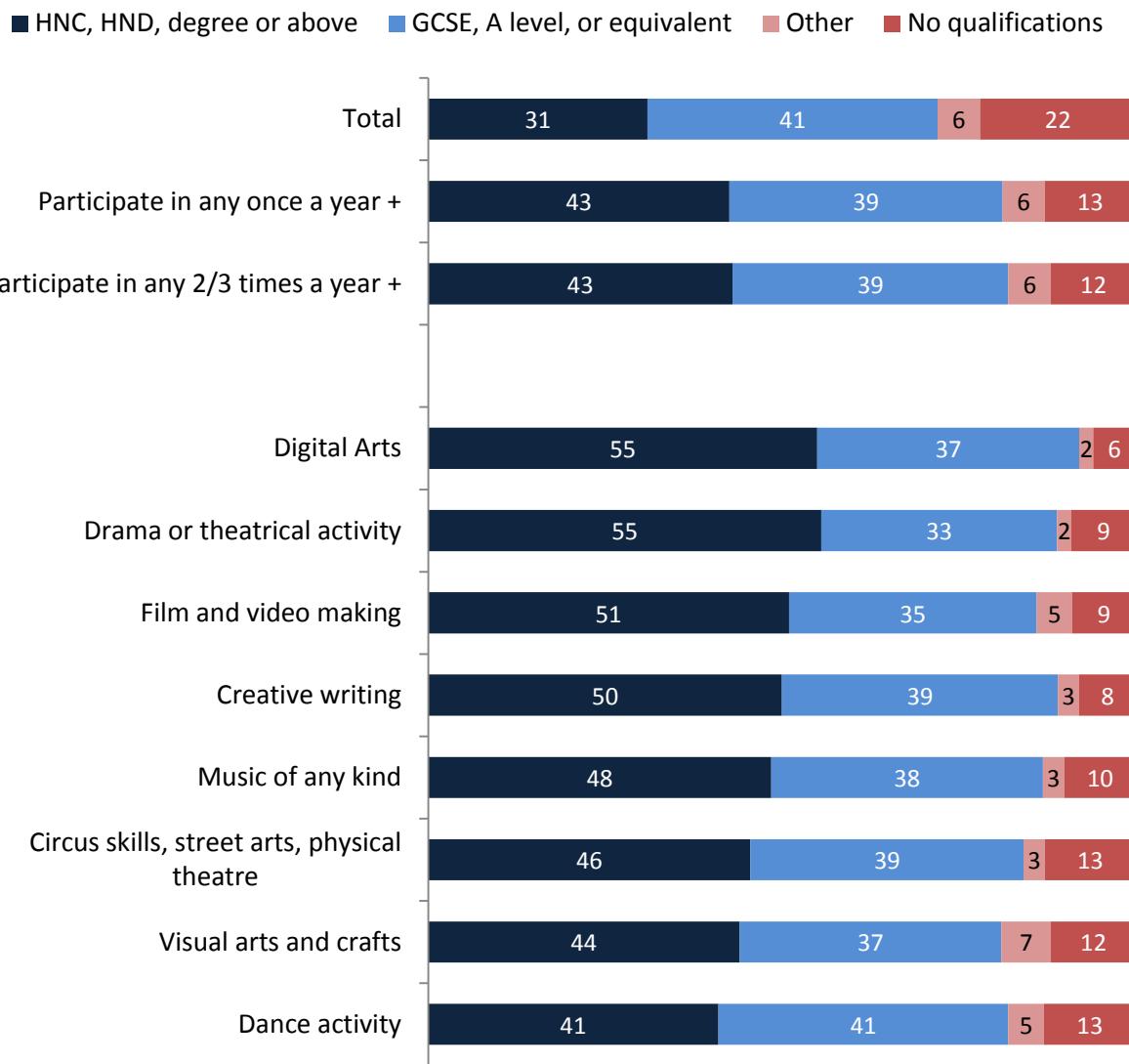


Base: those participating in each activity once a year or more often

Highest educational qualification by art form

As was the case for social grade, those with higher educational qualifications were more likely to participate in the arts. Activities where this was most apparent included digital arts, drama, film and video making and creative writing - where at least half of participants were educated to HNC, HND or degree level or above. Indeed, in all activities those educated at this highest level were overrepresented in terms of participation.

Figure 46: Profile of those participating in arts activities once a year or more often (by highest educational qualification, %)

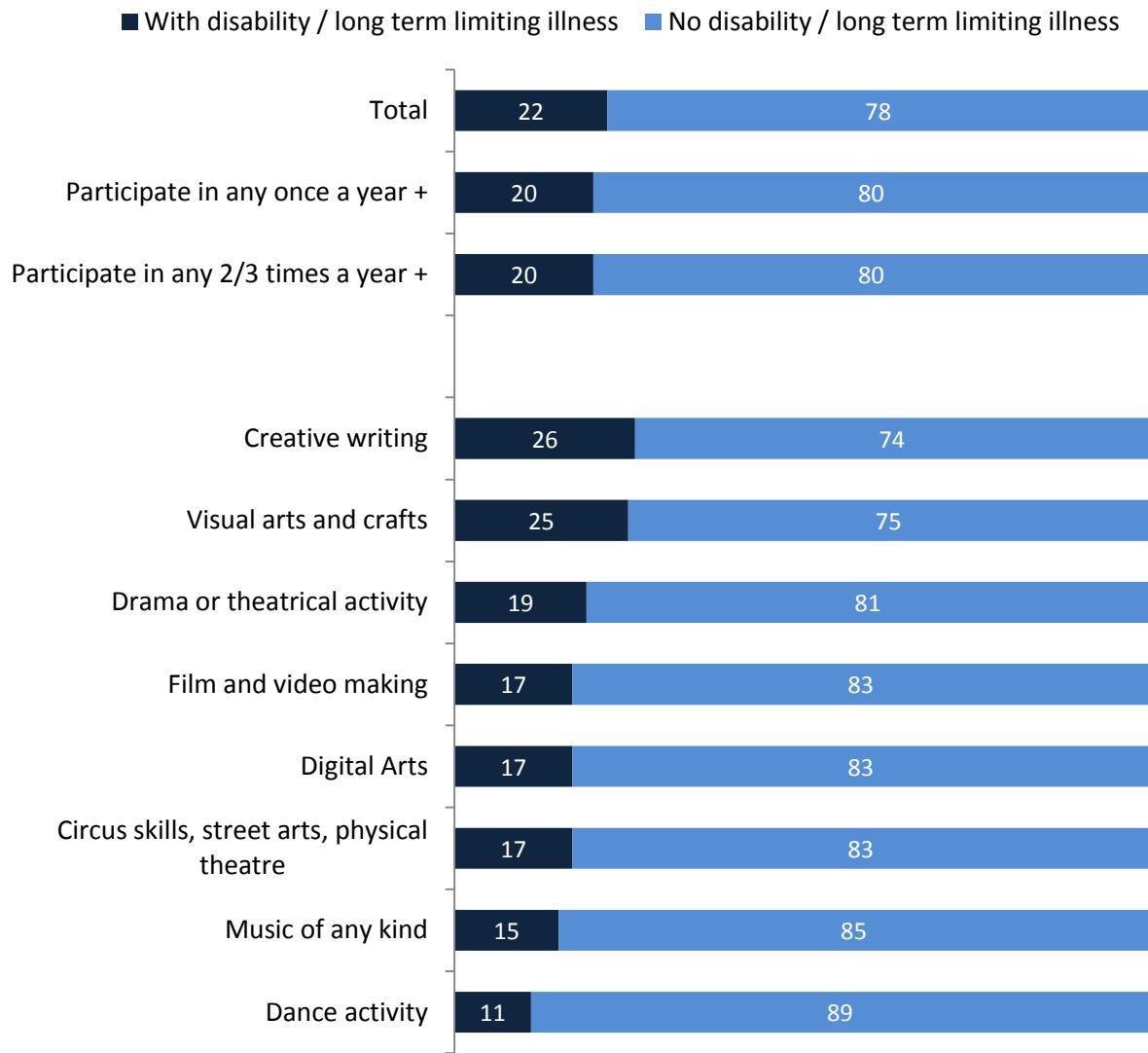


Base: those participating in each activity once a year or more often

Disability by art form

Creative writing, and visual arts and craft participants were more likely to have a disability or long term limiting illness than the overall population average, while music and dance activity were relatively less likely to be participated in by this group

Figure 47: Profile of those participating in arts activities once a year or more often
(those with disability / long term limiting illness, %)

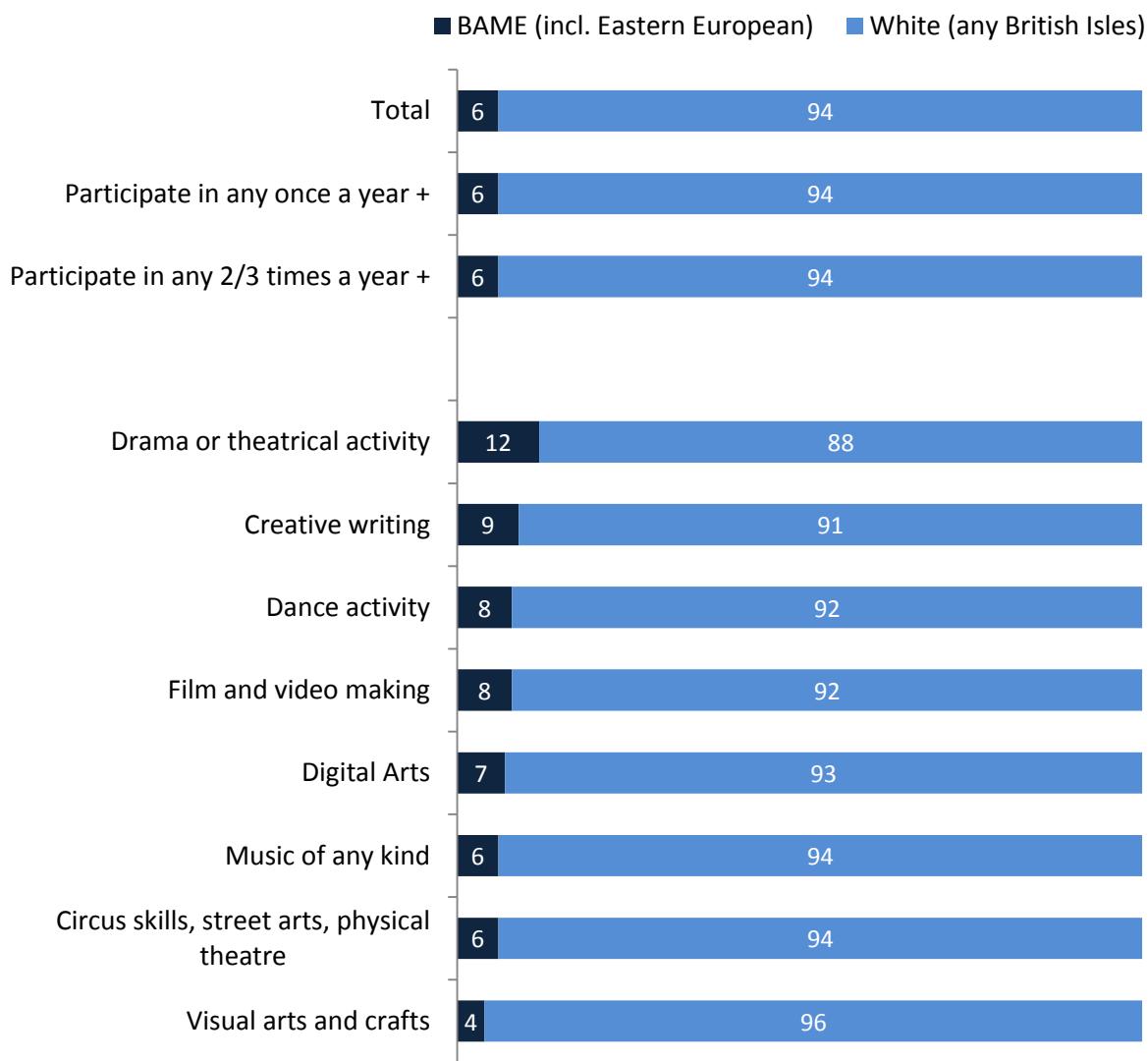


Base: those participating in each activity once a year or more often

Ethnicity (BAME inc. Eastern European) by art form

More than one in ten (12%) of those participating in drama or theatrical activity were from BAME (inc. Eastern European) ethnic groups and, in general, the proportions of BAME ethnic groups taking part in each of the activities at least match or exceed their incidence in the general population (6%). The only exception to this was visual arts and crafts where fewer than one in twenty (4%) participants were from these groups.

Figure 48: Profile of those participating in arts activities once a year or more often (by ethnicity - BAME and Eastern European groups, %)



Base: those participating in each activity once a year or more often

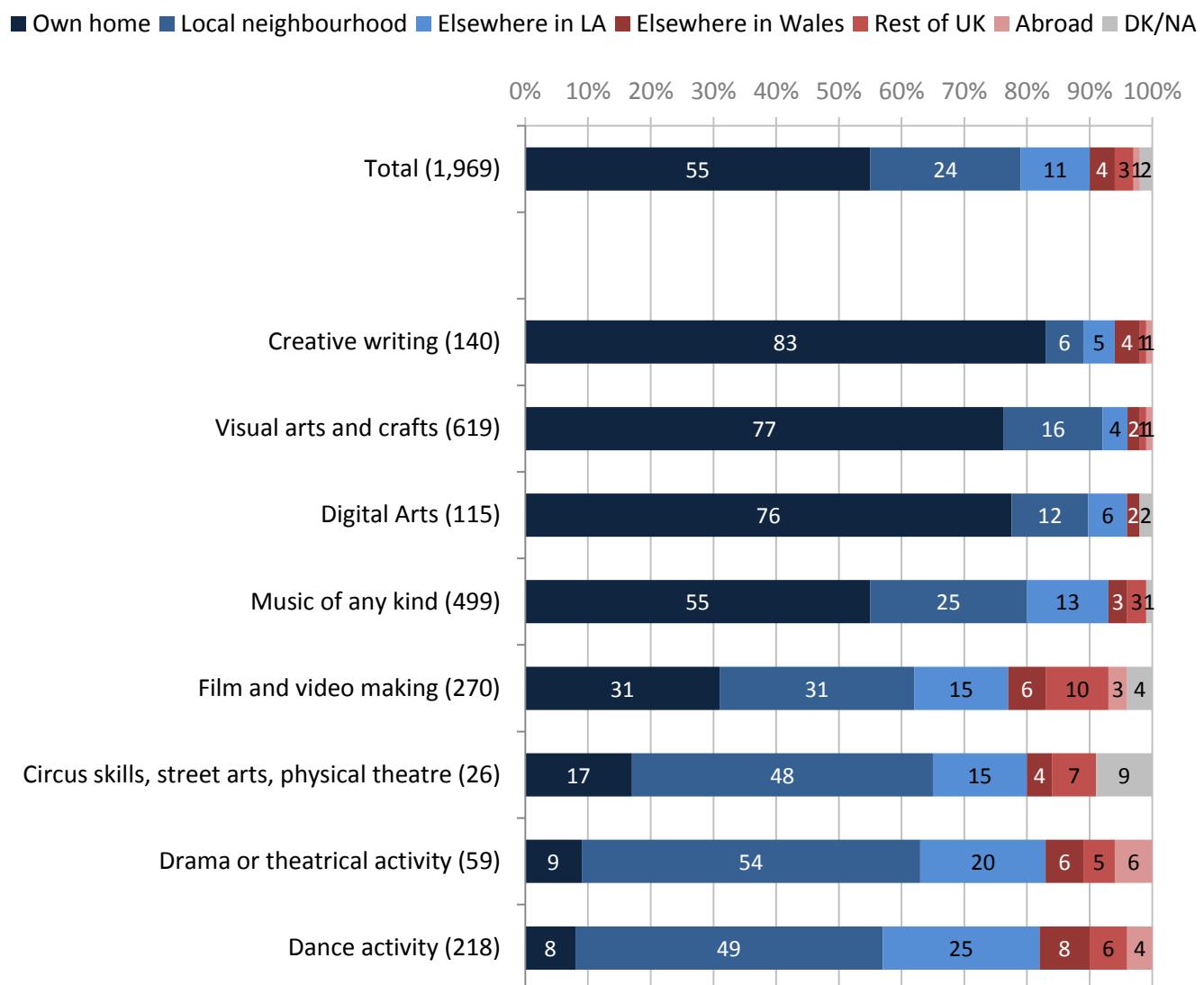
8.3 Location of most recent arts activity participation

The survey established where participants' most recent arts activity had taken place. Findings at an individual art form level are summarised in figure 49 below.

For three quarters or more, creative writing, visual arts and crafts, and digital arts activity had taken place in participants' own homes. Activities most likely to have taken place outside the home, within the local neighbourhood, were circus skills / street arts / physical theatre, drama, and dance activity – Approximately half of those participating in these art forms on the most recent occasion had done so in their own local neighbourhood.

Film and video making was most likely to have been done outside of Wales - for 13% who did so on the last occasion (10% doing so within the UK and 3% abroad).

Figure 49: Location of most recent arts event participated in (%)



Bases shown in brackets (arts event most recently participated in)

8.4 Reasons for participation

The reasons given for participating in arts activities, based on the most recent arts event attended, is summarised in figure 50 overleaf.

Enjoyment and pleasure were the dominant reason for participation – almost four fifths (79%) gave these as a reason for taking part. For a third (33%) developing creativity and self-expression was a factor, and a similar proportion (28%) mentioned quality of life/wellbeing. For a quarter (25%), learning new skills was a factor (especially among younger participants aged 16 to 24 – 33%), while others mentioned friends taking part (17%), the activity getting them out of the house (also mentioned by 17%) and helping them to feel a part of a community (reflecting the localised profile of participation overall). Boosting self-confidence and health were both reasons mentioned by one in ten (12% and 10% respectively).

Notable differences in reasons for participation by activity included:

- Quality of life being relatively more likely to be mentioned by those taking part in dance activity (40%, compared with 28% overall), as were health benefits (25% mentioning compares with 10% overall).
- Learning new skills was a particular motivation for those involved in digital arts (42%), and was the second most motivating factor after enjoyment/pleasure (which was the most frequently mentioned factor for all art forms).
- Friends taking part was relatively more likely to be a reason for participating in dance activity (36%) and drama or theatrical activity (34%). Indeed this was the second most common reason among those taking part in drama or theatrical activity.
- ‘Gets me out of the house’ was also more likely to be a reason given by those taking part in dance activity on the last occasion (33%), and the community aspect was also more likely to be a factor for those involved in drama (25%).

Figure 50 Reasons for participating in most recent arts activity (%. Top two mentions in bold)

	All (1,969)	Visual arts and crafts (619)	Music of any kind (499)	Film and video making (270)	Dance activity (218)	Creative writing (140)	Drama or theatrical activity (59)	Digital Arts (115)	Circus skills, street arts, physical theatre (26)
Enjoyment\pleasure	79	85	84	81	81	69	69	66	52
Develops my creativity and self expression	33	38	34	33	13	49	20	37	18
Improves my quality of life\well-being	28	30	30	21	40	27	17	11	34
To learn new skills	25	26	28	17	19	24	23	42	13
Friends take part	17	11	22	13	36	11	34	8	7
Gets me out of the house	17	13	17	24	33	6	20	7	24
Helps me to feel part of a community	12	11	18	8	12	10	25	5	11
Improves my confidence	12	11	15	7	14	15	21	8	22
Participating in arts activities is a boost to my health	10	9	9	5	23	11	10	4	30

Bases shown in brackets (arts event most recently participated in)

Appendix: Survey Questionnaire

Good morning/afternoon/evening, my name is [INTERVIEWER NAME] and I am working on behalf of a market research agency called Beaufort Research. Could you spare the time to answer some questions relating to leisure activities, the arts and how people spend their free time? The questionnaire should take around 10 minutes.

A1 Which language would you like to undertake the interview in, English or Welsh?

1. English [GO TO A1](#)
2. Welsh, conduct interview now [WELSH LANGUAGE VERSION](#)
3. Welsh, conduct interview later [READ OUT TEXT ON NEXT SCREEN AND MAKE APPOINTMENT AS NECESSARY]

Can I please take your details so that a Welsh speaking interviewer can make an appointment to call back to conduct the interview in Welsh?

1. Yes - Please collect respondent name, address and telephone number and contact the office who will arrange for a Welsh speaking interviewer to conduct the interview at a time convenient to the respondent [\[CLOSE INTERVIEW\]](#)
2. No, would like to proceed now with interview in English
3. No, do not wish to proceed [\[CLOSE INTERVIEW\]](#)

PART 1 BACKGROUND INFORMATION

A1. RECORD GENDER:

- 1 Male
- 2 Female

A2. What is your age?

1. 16-17
2. 18-19
3. 20-24
4. 25-29
5. 30-34
6. 35-44
7. 45-54
8. 55-59
9. 60-64
10. 65-69
11. 70-74
12. 75 and over

A3. Can you tell me the occupation of the Chief Income Earner within the household?

(The Chief Income Earner is the member of the household with the largest income, whether from employment, pensions, state benefits, investments or any other source.)

OCCUPATION OF CHIEF INCOME EARNER (Give last job if wholly retired or registered unemployed)

ACTUAL JOB: _____

POSITION / GRADE: _____

SOCIAL CLASS (Based on occupation of chief income earner)

1. AB
2. C1
3. C2
4. DE

MAIN QUESTIONNAIRE

SHOW CARD A

Q1 About how often these days do you go to...

READ OUT

ROTATE ORDER OR ART FORMS(4 MUSIC ART FORMS IN FIXED POSITION, SO THAT 'OTHER MUSIC MAKES SENSE).

- a) ...a cinema to see a film?
- b) ...a musical (not an opera)?
- c) ...an opera?
- d) ...a ballet?
- e) ...contemporary dance performances?
- f) ...plays?
- g) ...classical music concerts or recitals?
- h) ...jazz concerts or performances?
- i) ...folk, traditional or world music?
- j) ...other live music?
- k) ...art or craft galleries or exhibitions?
- l) ...readings, storytelling and other literary events?
- m) ...carnivals and street arts?
- n) ...a circus (not involving animals)?
- o) ...an arts festival (e.g. music, literature, drama, dance or an Eistedfodd)?
- p) ...a pantomime?

RESPONSE SCALE:

1. Once a month or more
2. Once every 2-3 months
3. 2-3 times per year
4. Once a year
5. Less often
6. Never
7. &DK

IF NONE ATTENDED AT Q1, SKIP TO Q4. OTHERWISE CONTINUE.

Q1B. And which of the following was the most recent performance or event you attended?

READ OUT

ROTATE ORDER

- a) Cinema to see a film
- b) Musical (not an opera)
- c) Opera
- d) Ballet
- e) Contemporary dance performances
- f) Plays
- g) Classical music concerts or recitals
- h) Jazz concerts or performances
- i) Folk, traditional or world music
- j) Other live music
- k) Art or craft galleries or exhibitions
- l) Readings, storytelling and other literary events
- m) Carnivals and street arts
- n) Circus (not involving animals)
- o) Arts festival (e.g. music, literature, drama, dance or an Eistedfodd)
- p) Pantomime

Q2. Thinking about the [EVENT/PERFORMANCE FROM Q1B] you attended most recently, was this...?

READ OUT AND SHOW SCREEN

1. Somewhere in your local neighbourhood
2. Somewhere else in [INSERT LOCAL AUTHORITY FROM SAMPLE]
3. Elsewhere in Wales (PLEASE SPECIFY NEAREST TOWN, CITY OR LOCAL AUTHORITY WHERE EVENT ATTENDED)
4. Rest of UK
5. Abroad

SHOW CARD B

Q3. Still thinking about the [EVENT/PERFORMANCE FROM Q1B] you attended most recently, what were your reasons for going?

1. To see a specific performer, artist or company
2. To see a specific show or event
3. Helps me to feel part of a community
4. A relative or friend was involved in the event
5. Attending arts events is a boost to my health
6. Like going to that type of event
7. Special occasion\celebration
8. Social event or night out
9. Invited to go by someone else
10. Recommended by a friend or relative
11. Accompanying children
12. Happened to be passing by
13. Connected with work or studies
14. For entertainment\enjoyment
15. Other (specify)

SHOW CARD C

Q4 About how often these days, if at all, do you take part yourself in your leisure time in any of the following activities? By ‘take part’ I mean in your free time in the home, in classes, rehearsals, shows or in workshops other than as part of your job or in full time education.

READ OUT

ROTATE ORDER

- a) Music of any kind including playing an instrument, singing, helping out in a choir, operatic society, brass band, orchestra, folk, rock or jazz group
- b) Drama or theatrical activity of any kind
- c) Dance activity of any kind
- d) Film and video making including photography other than family, holiday or party snaps
- e) Visual arts and crafts, for example, painting, sculpting, pottery, wood-turning, jewellery making, weaving or textiles
- f) Creative writing, for example, poetry or stories
- g) Digital Arts: creating and making original artwork or animation using digital technology
- h) Circus skills, street arts or other physical theatre activity

RESPONSE SCALE:

1. Once a week or more
2. 2-3 times per month
3. Once a month
4. Once every 2-3 months
5. 2-3 times per year
6. Once a year
7. Less often
8. Never
9. &DK

IF NONE OF THE ACTIVITIES AT Q4 WERE PARTICIPATED IN, SKIP TO Q8. OTHERWISE CONTINUE.

Q5. And which of these did you take part in most recently...?

READ OUT AND SHOW SCREEN

INSERT ALL PARTICIPATED IN AT Q4. ROTATE ORDER

- a) Music activity
- b) Drama or theatrical activity of any kind
- c) Dance activity
- d) Film and video making including photography other than family, holiday or party snaps
- e) Visual arts and crafts, for example, painting, sculpting, pottery, wood-turning, jewellery making, weaving or textiles
- f) Creative writing, for example, poetry or stories
- g) Digital Arts: creating and making original artwork or animation using digital technology
- h) Circus skills, street arts or other physical theatre activity

Q6. Thinking about the [ACTIVITY FROM Q5] you took part in most recently, was this...?

READ OUT AND SHOW SCREEN.

- 1. In your own home
- 2. Somewhere in your local neighbourhood
- 3. Somewhere else in [INSERT LOCAL AUTHORITY FROM SAMPLE]
- 4. Elsewhere in Wales (PLEASE SPECIFY NEAREST TOWN, CITY OR LOCAL AUTHORITY WHERE EVENT ATTENDED)
- 5. Rest of UK
- 6. Abroad

SHOW CARD D [INVERT ORDER]

Q7. What were your reasons for taking part in [ACTIVITY FROM Q5]? You can mention as many or as few as you wish.

MULTICODE POSSIBLE.

- 1. To learn new skills
- 2. Enjoyment\pleasure
- 3. Improves my confidence
- 4. Friends take part
- 5. Gets me out of the house
- 6. Participating in arts activities is a boost to my health
- 7. Helps me to feel part of a community
- 8. Improves my quality of life\well-being
- 9. Develops my creativity and self expression
- 10. Other (specify)

SHOW CARD E [INVERT ORDER]

Q8. Which of the following have you done at least once in the last year?

MULTICODE POSSIBLE.

1. Go to a sports event as a spectator
2. Play\take part in sport of any kind
3. Go on a day trip e.g. shopping, spa day
4. Visit a tourist or historic attraction
5. Go on an outing to the countryside or seaside
6. Go out for a drink or a meal
7. Visited a website to view\download an online arts collection or arts performance
8. Purchased a film or TV Drama via a digital download
9. Purchased music via digital download
10. Purchased a book of fiction or poetry via a digital download
11. Go on social networking sites (e.g. facebook, twitter, Instagram, linkedin)
12. Play computer or console games
13. Spent time doing DIY
14. Spent time gardening
15. Done any volunteering
16. None of these

ASK ALL

SHOW CARD F [INVERT ORDER]

Q9. Here is a list of things which people say prevent them from attending or participating in arts events or activities. Which, if any, prevent you from going to or taking part in the arts at all or more often than you currently do...?

1. It is difficult to find the time
2. It costs too much
3. Family commitments\childcare
4. The arts are just not for me
5. My health is not good enough
6. Lack of access\facilities for disabled people
7. I had a bad experience the last time I went
8. There hasn't been anything I am interested in
9. There is nothing available near my home
10. Other (specify)

SHOW CARD G [INVERT ORDER]

Q10. I am now going to read out some things people have said about arts and culture and I would like you to tell me how strongly you agree or disagree with each statement. There are no right or wrong answers, it is just your personal opinion that we are interested in.

READ OUT

ROTATE ORDER

- a) I believe it is right that there should be public funding of arts and cultural projects
- b) All children should have the opportunity to learn to play a musical instrument or participate in other arts activities at school
- c) Arts and culture make Wales a more interesting and vibrant place to live in
- d) If my area lost its arts and cultural activities, the people living here would lose something of value
- e) Skills gained from participating or learning about arts and cultural activity can help you get a job
- f) I feel inspired by artistic activity and enjoy getting involved
- g) Arts and cultural activity help to enrich the quality of my life
- h) I believe the arts activity I attend, or take part in, represents good value for money

RESPONSE SCALE:

1. Strongly agree
2. Agree
3. Neither agree nor disagree
4. Disagree
5. Strongly disagree
6. &DK

SHOW CARD H

Q11. What do you consider your national identity to be? Choose as many or as few apply from the following...

1. Welsh
2. English
3. Scottish
4. Northern Irish
5. British
6. Irish
7. European
8. Other (specify)

SHOW CARD I

Q12. Which of these describes your ethnic group?

White

- 1 Welsh\ English\ Scottish \ Northern Irish \ British
- 2 Irish
- 3 Gypsy or Irish Traveller
- 4 Other white background (please specify)

Mixed

- 5 White and Black Caribbean
- 6 White and Black African
- 7 White and Asian
- 8 Other Mixed background (please specify)

Black or Black British

- 9 Caribbean
- 10 African
- 11 Any Other black background (please specify)

Asian or Asian British

- 12 Indian
- 13 Pakistani
- 14 Bangladeshi
- 15 Chinese
- 16 Other Asian background (please specify)

Other Ethnic Group

- 17 Arab
- 18 Any other (please specify)

Q13. Do you have any long term illness, health problem or disability which limits your daily activities or the work that you do?

1. Yes
2. No

SHOW CARD J

Q14. Can you understand, speak, read or write Welsh?

1. Speak Welsh **GO TO Q15**
2. Understand spoken Welsh
3. Read Welsh
4. Write Welsh
5. None of the above

SHOW CARD K

Q15. Which of these best describes your ability in speaking Welsh?

1. I'm fluent in Welsh
2. I can speak a fair amount of Welsh
3. I can only speak a little Welsh
4. I can only say a few words

Q16. Have any of the arts events that you have attended or participated in during the last year been Welsh language events?

1. Yes
2. No

Q17. Do you have any dependent children in the following age groups? (i.e. children you are the parent, step-parent or guardian of)

READ OUT

RECORD NUMBER OF CHILDREN IN EACH AGE GROUP

1. 0-4 years
2. 5-11 years
3. 12-15 years

IF THERE ARE NO CHILDREN IN ANY PARTICULAR AGE CATEGORY, PLEASE ENTER 00 IN THE BOX

Q18 Are you...?

READ OUT

1. In full-time employment (over 30 hours per week)
2. In part-time employment (30 hours or less per week)
3. Not in paid employment and not seeking work
4. Unemployed\seeking work
5. Full-time student
6. Wholly retired\other permanently not working

SHOW CARD L

Q19. What is your highest level of educational qualification?

1. GCSE, O-Level, O-Grade, Standard Grade or similar
2. A level, Higher, Sixth Year Study or similar
3. HNC or HND
4. First Degree
5. Higher Degree
6. No qualifications
7. Still in education
8. Other (please specify)

NAME & ADDRESS (INCLUDING FULL POSTCODE)

PHONE NUMBER

REASSURE AS NECESSARY: Telephone numbers are only collected so that Head Office staff can establish the interview actually took place in the appropriate manner. Personal details are not used for any other purpose and are not passed on to anyone else.

READ OUT

Thank you for taking the time to complete this survey. This thank you leaflet explains that Beaufort adhere to the Market Research Society guidelines.

enquiries@beaufortresearch.co.uk

www.beaufortresearch.co.uk