



 Cyngor Celfyddydau Cymru
Arts Council of Wales

2020 Wales Omnibus Survey
Adult Engagement in the Arts

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Front cover: Pushing paper: contemporary drawing from 1970 to now, Glynn Vivian (image: Poly Thomas)

Introduction

Background

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

This report summarises the findings of the latest survey conducted in November 2020, examining demographic and regional variations in attendance and participation.

Methodology

The Omnibus sample is designed to be representative of the adult population resident in Wales aged 16 and over. The COVID-19 public health crisis prevented the survey from being carried out in its usual manner of face-to-face interviewing at selected sample points throughout Wales. Instead interviews for the November 2020 survey were undertaken online using the Cint online panel exchange platform.

Online surveys were configured for PC/tablet and smartphone completion and English and Welsh versions of each were offered to every respondent. Fieldwork for the November 2020 survey took place between 9 to 29 November 2020. A total of 1,002 interviews were completed and analysed.

The sample was designed to be representative of the adult population resident in Wales aged 16 years and over. The survey was subject to interlocking demographic quota controls of age within gender. A further separate quota control was set on social grade and interviews were undertaken with residents of every local authority in Wales. The resulting data was also weighted to fine tune any imbalances in the sample, to ensure that it was fully representative of the Welsh population.

Attendance at Arts Events

Since 2006 survey respondents have been questioned about their attendance to a consistent list of 14 artforms.

In 2020, three quarters (75.1%) of adults in Wales attended arts events once a year or more often. The equivalent figure for 2019 is 86.8%. This brings attendance back down to 2013 levels. If cinema is excluded from this figure 64.1% of adults attend at least once a year with the equivalent figure for 2019 being 82.4%

The table below shows the 2020 level of attendance against the previous 9 years. the data cannot be compared like for like due to the change in methodology but should be used as a new baseline. The table provides an indication of how levels of attendance have changed from the previous 9 years.

Table 1: Attendance to arts events once a year or more between 2010 to 2020

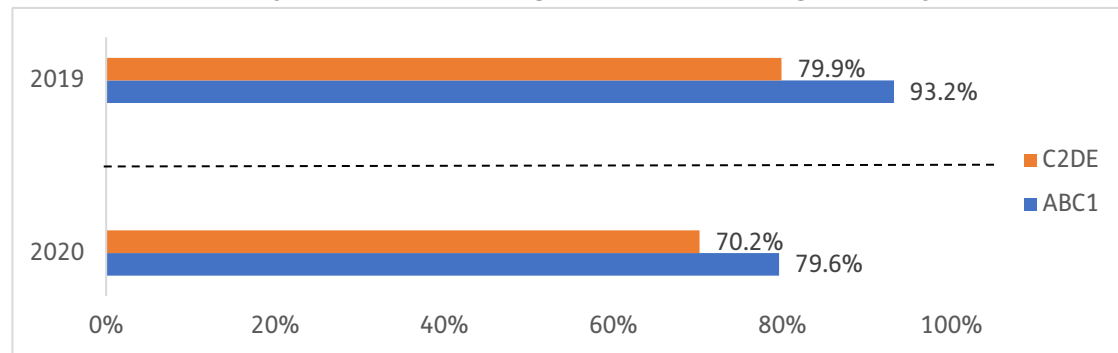
2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
79.2%	74.4%	76.3%	75.1%	79.8%	78.6%	78.1%	80.7%	84.6%	86.8%	75.1%

Attendance to Arts Events by key demographics:

Please note: The dotted line shown within each graph signifies like for like comparisons cannot be made due to a change in methodology.

Social Grade

Arts Attendance by Socio economic grade (% attending once a year or more)



8 in 10 (79.6%) of those in the ABC1 socio economic group attended arts events once a year or more often in 2020, compared to 7 in 10 (70.2%) of those in the C2DE group. This leaves a gap between the two of 9.4 percentage points. The gap is very similar when cinema is excluded, with 68.9% of those in the ABC1 group attending compared to 58.8% of those in the C2DE group, a gap of 10.1 percentage points.

Base: All Adults (2019: 1,002 & 2020: 1,002)

Source: Wales Omnibus Survey 2019-2020

Although there has been a change in methodology, the pattern of attendance by these two socio economic groups follows the general trend of previous years with the higher socio-economic groups experiencing more frequent levels of attendance over the last ten years.

Age

Attendance to Arts Events by Age	16-24	25-34	35-44	45-64	65+
(Incl cinema) Once a year or more often	86.6%	81.4%	79.7%	73.4%	58.6%
(Exclud Cinema) Once a year or more often	72.1%	67.4%	67.6%	63.6%	52.0%

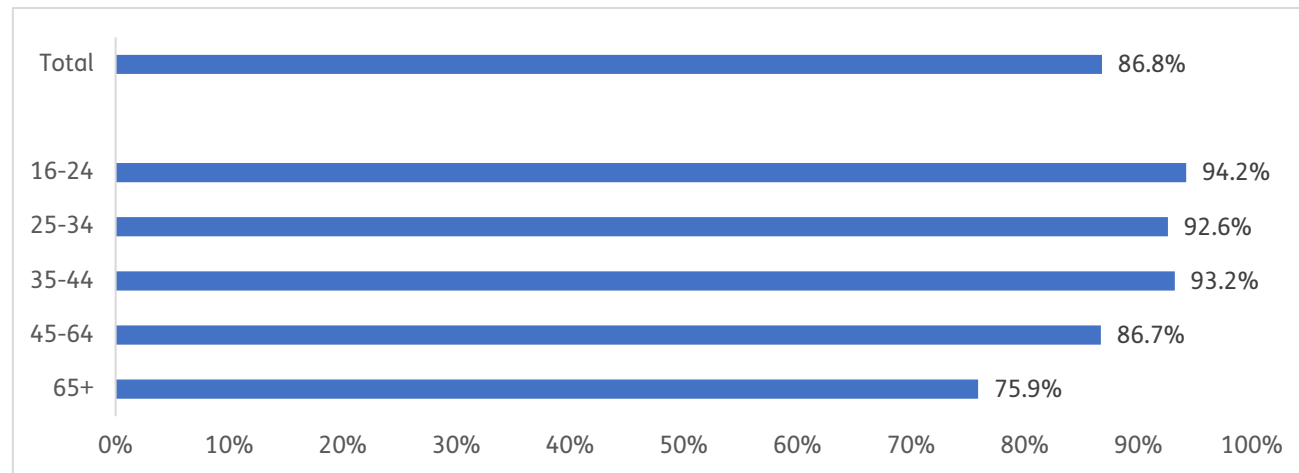
Table 2: Attendance to Arts Events by Age

Attendance to arts events declines with age in 2020. While 86.6% of those in the 16-24 age group attend once a year, this declines to just over half, (58.6%) of those in the 65+ age group.

Base: All Adults (2019: 1,002 & 2020: 1,002)

Source: Wales Omnibus Survey 2020

2019 Attendance by Age (including cinema once a year or more often)



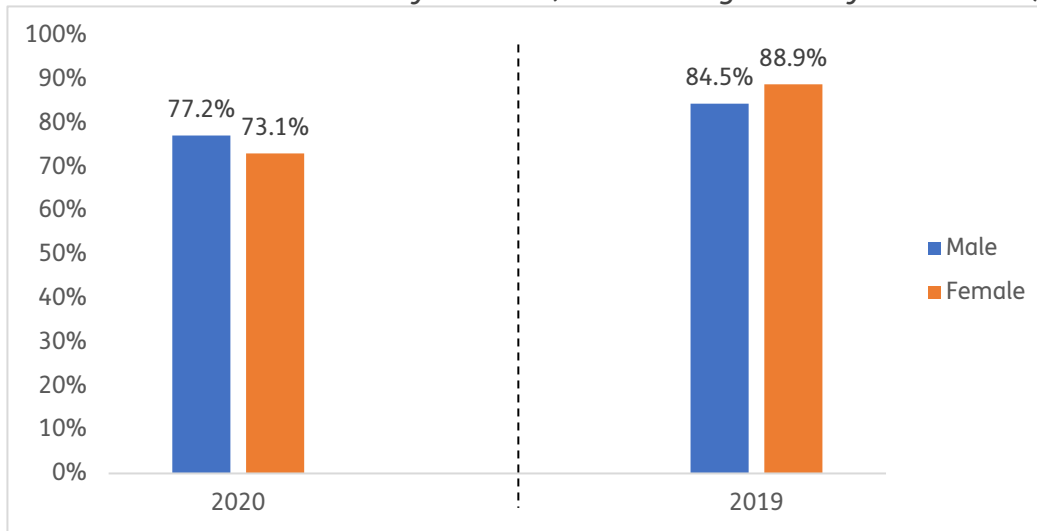
In 2019 the youngest age group also had the highest levels of attendance. Just over 90% of those aged 16-24 attended once a year or more compared to three quarters of those in the 65+ age group.

Base: All Adults (2019: 1,002 & 2020: 1,002)

Source: Wales Omnibus Survey 2020

Gender

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



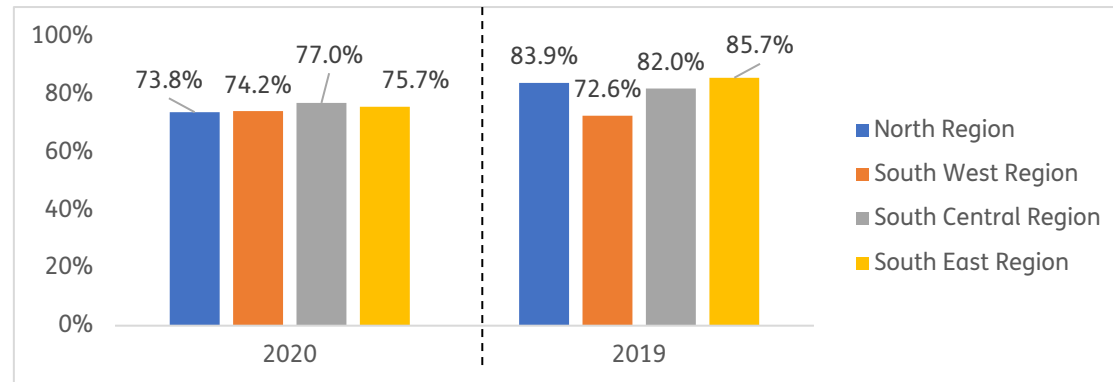
More women, (77.2%) than men, (73.1%) attended arts events in 2020, a gap of 4.1 percentage points. Allowing for the change in methodology, this is still a similar gap to 2019 when 88.9% of women attended compared to 84.5% of men, a gap of 4.4 percentage points.

Base: All Adults (2019: 1,002 & 2020: 1,002)

Source: Wales Omnibus Survey 2020

Region

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



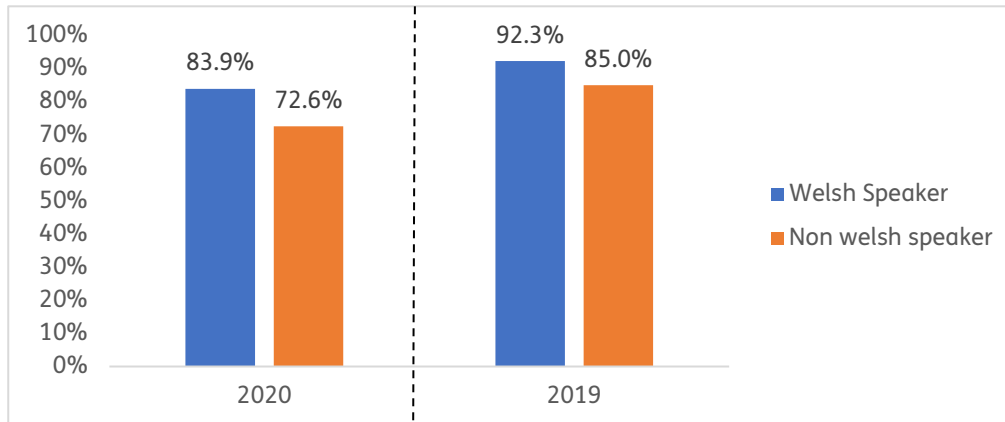
The South Central region had the highest levels of attendance in 2020, with 77% of adults from this region attending arts events once a year or more often. This was closely followed by the South East region at 75.7%, then the South West region at 74.2% and then the North region at 73.8%. In 2019, while direct comparisons cannot be made, it was the South East region with the highest level of attendance at 85.7%.

Base: All Adults (2019: 1,002 & 2020: 1,002)

Source: Wales Omnibus Survey 2020

Welsh language

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

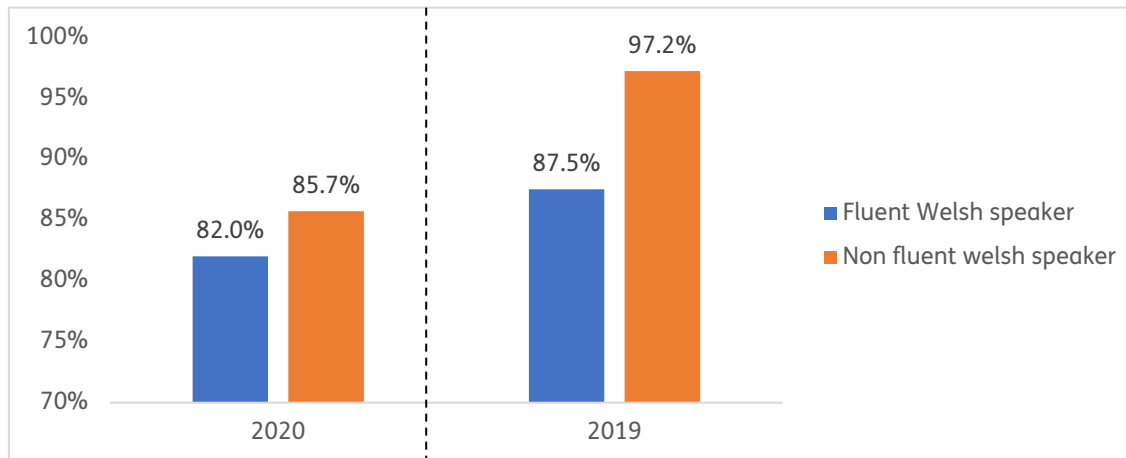


In terms of attendance levels and Welsh language ability, a higher proportion of adults who could speak Welsh attended arts events in 2020 compared to those whom could not speak Welsh, 83.9% compared to 72.6% once a year or more.

Base: All Adults (2019: 1,002 & 2020: 1,002)

Source: Wales Omnibus Survey 2020

Further breakdown of Welsh language and Attendance (% attending once a year or more)



When the breakdown of Welsh speakers is focused upon, there were slightly higher levels of activity among the non-fluent Welsh speakers as opposed to the fluent Welsh speakers during 2020, with 85.7% attending once a year or more compared to 82% of non-fluent Welsh speakers.

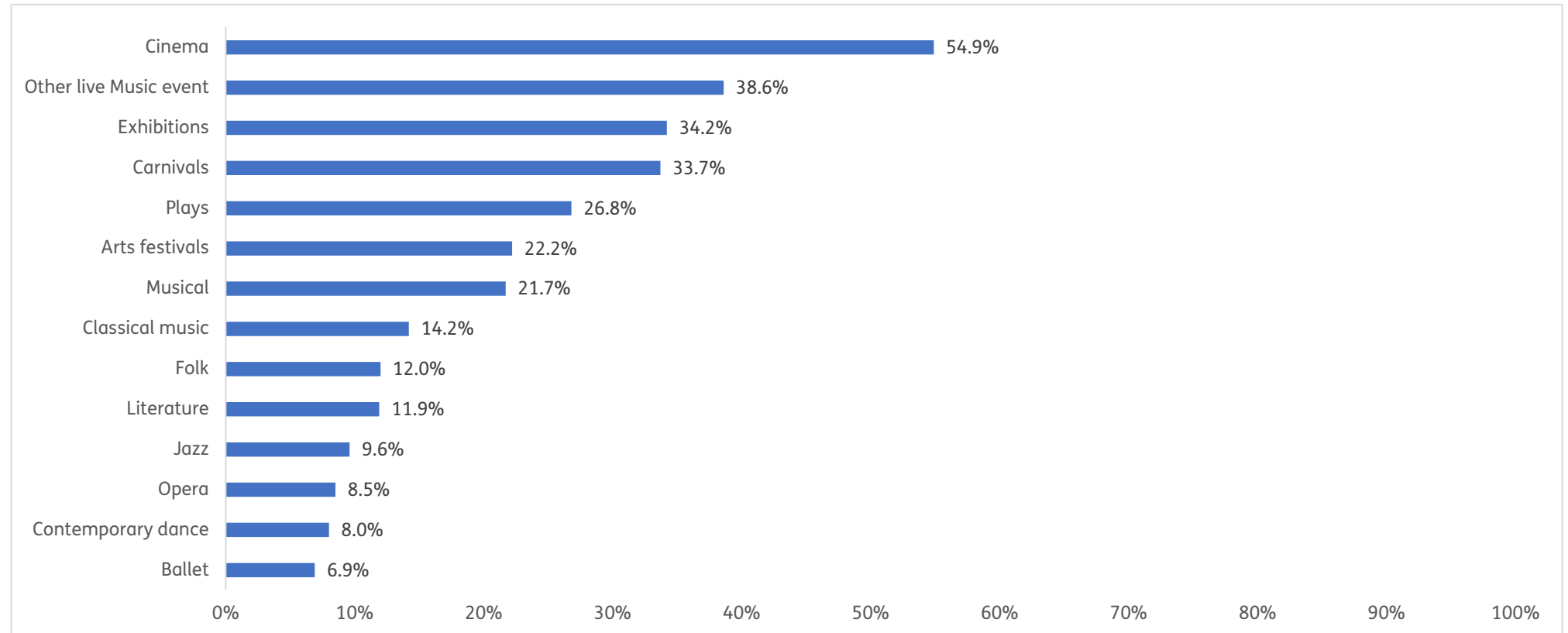
Base: All Adults (2019: 1,002 & 2020: 1,002)

Source: Wales Omnibus Survey 2020

Attendance to Art Events by Artform

Attendance by Artform in 2020

Attendance to Arts Events by Artform in 2020 (% attending once a year or more)



Base: All Adults (2020: 1,002)

Source: Wales Omnibus Survey 2020

Cinema was the most popular artform for adults to attend in 2020, with 54.9% of adults attending once a year or more. This was followed by other live music, 38.6%, and exhibitions and carnivals 34%. Ballet, contemporary dance and opera were all the least attended events with between 6.9% and 8.5% attending these artforms at least once a year.

Attendance by Artform in 2019

Table 3: Attendance by Artform in 2019

Cinema	60%
Other Live Music	49.9%
Exhibitions	38.4%
Carnivals	46.2%
Plays	35.8%
Arts Festivals	23.6%
Musicals	26.5%
Classical Music	13.9%
Folk	14.1%
Literature	12.4%
Jazz	10.0%
Opera	6.1%
Contemporary dance	8.6%
Ballet	5.5%

If 2019 is used as an indication, cinema was also the most frequently attended artform and ballet, opera and contemporary dance were the least frequently attended artforms.

During 2020:

- Just over half (54.9%) of adults attended cinema at least once a year. For indication, in 2019 this figure was 60%.
- More women than men attended musicals, 24.3% compared to 19.2%, and this follows a similar pattern to 2019. Although the data cannot be directly compared, levels of attendance have not changed for men: one fifth attended in both years, while 32.1% of women were attending in 2019.
- 25-34 year-olds were most likely to attend musicals once a year or more, 27.6%. In 2019, 25-34 year-olds had the lowest levels of attendance.
- Just under one in ten adults (8.5%) attended opera events, as a gauge this figure was 6.1% in 2019.
- There was no difference in levels of attendance to ballet by gender, with 7% of both men and women attending. In 2019 there were more women than men attending: 7.5% of women attended once a year or more compared to 3.4% of men.
- One in 10 of those in the ABC1 socio economic group attended contemporary dance events at least once a year compared to 6.3% of those in the C2DE group.
- Both 16-24 year-olds and 65+ were the most frequent attenders to plays, lowest levels were among the 45-64 year olds. In 2019 it was the 35-44 year-olds who had the highest levels of attendance and the 25-34 year olds with the lowest.
- 14.2% of adults attended a classical music event. More men attended than women, 16.1% compared to 12.5%, which is the opposite pattern to 2019 when 15.8% of women attended compared to 11.8% of men.
- Almost one in 10 adults, (9.6%) attended jazz events, as an indication this is the same as 2019.
- Folk was attended by 12% of adults, 2019 saw 14.1% of adults attending this artform.
- 11.9% of adults attended readings, storytelling and other literary events. There was little difference in attendance levels between men and women, with 12.6% of men attending and 11.3% of women.
- Almost 4 in 10 (38.6%) adults were attending other live music events, there were higher attendances among the youngest age groups, 46.5% of 16-24 year-olds and lowest among the oldest age groups, 22.1% of 65+ attending once a year or more.
- 34.2% of adults attended exhibitions of arts and crafts, almost double the proportion of those in the ABC1 socio economic group attended, 44.5% compared to those in the C2DE group, 23.1%
- A third of adults (33.7%) were attending carnivals once a year or more. More men attended, 36.8% than women, 30.3%
- Arts festivals were attended by 22.2% of adults, with more men and more of those in the ABC1 group attending. A quarter of men attended once a year or more compared to 19.8% of women and 27% of those in the higher social group attended compared to 16.9% of those in the lower social groups.

Participation

56.6% of respondents took part once a year or more often to any artistic activities in 2020.

Previous years' figures cannot be used as comparison due to the change in context and methodology, however it can provide an indication of trends prior to the pandemic.

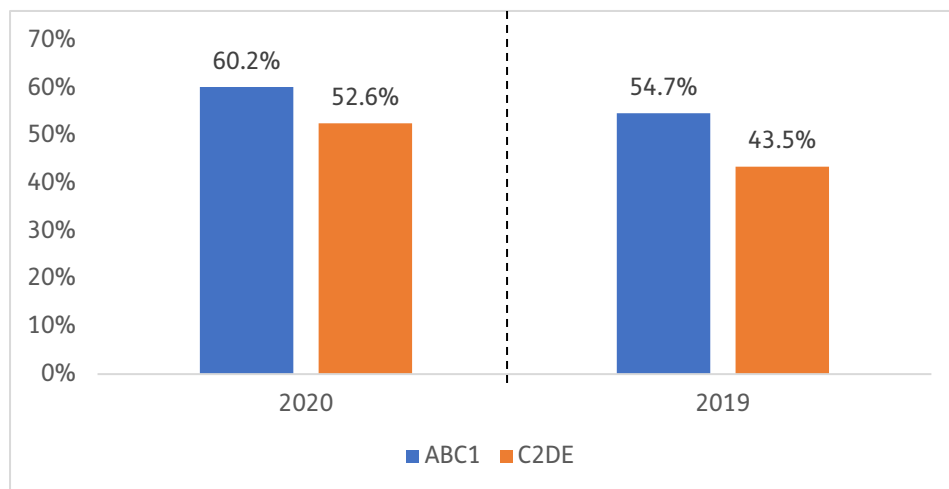
Table 4: Participation to arts activities between 2010 and 2020

2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
30.4%	28.9%	40.2%	34.9%	40.1%	41.2%	44.1%	45.8%	45.6%	49.3%	56.6%

Participation to art activities by key demographics

Social Grade

Participation in arts activities by Social Grade (% attending once a year or more)



60.2% of adults from ABC1 backgrounds took part in arts activities at least once a year in 2020, compared to 52.6% of respondents from C2DE backgrounds – a 7.6 percentage points difference. Participation among people from C2DE backgrounds was 4 percentage points lower than the average of 56.6%.

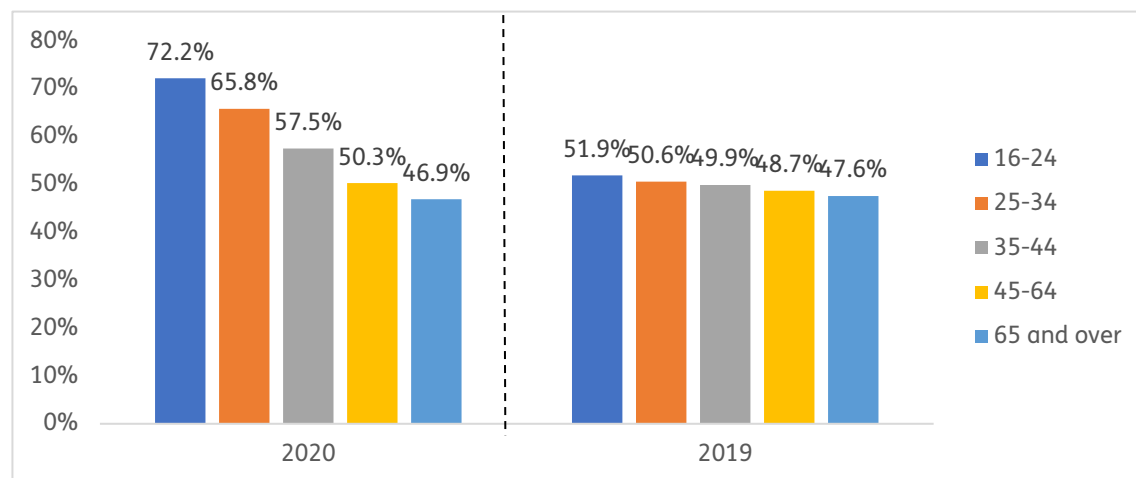
For indication, this is the same pattern as 2019, although participation rates have increased among both groups (54.7% among ABC1 groups and 43.5% among C2DE groups in 2019).

Base: All Adults (2019: 1,002 & 2020: 1,002)

Source: Wales Omnibus Survey 2020

Age

Participation in arts activities by age (% taking part once a year or more)



Participation in the arts at least once a year was higher the younger respondents were. Participation among 45-64 year-olds and over-65-year-olds was lower than the average by respectively 6.3 and 9.7 percentage points.

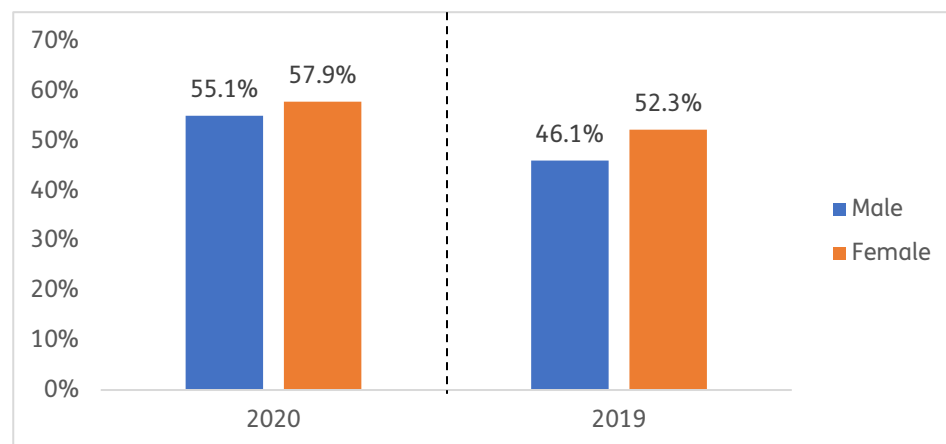
This pattern is the same as in 2019, although participation rates have increased for all age groups except 65-year-olds and over: in 2019, 47.6% of 65-year-olds took part at least once a year.

Base: All Adults (2019: 1,002 & 2020: 1,002)

Source: Wales Omnibus Survey 2020

Gender

Participation in arts activities by gender (% taking part once a year or more)



Participation in the arts was higher among women than men by 2.8 percentage points, at 57.9%.

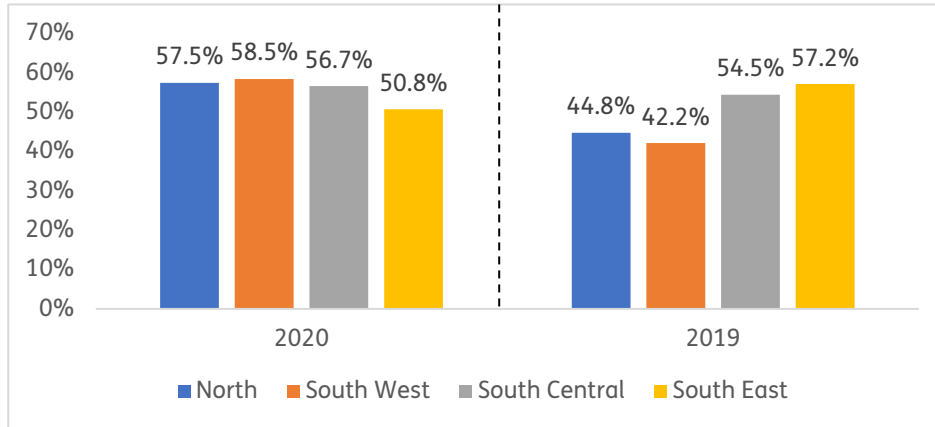
For indication, this is the same pattern since at least 2017, although participation among both genders has increased. In 2019, participation was at 46.1% for male respondents and 52.3% for female respondents.

Base: All Adults (2019: 1,002 & 2020: 1,002)

Source: Wales Omnibus Survey 2020

Arts Council of Wales Regions

Participation in arts activities by region (% once a year or more)



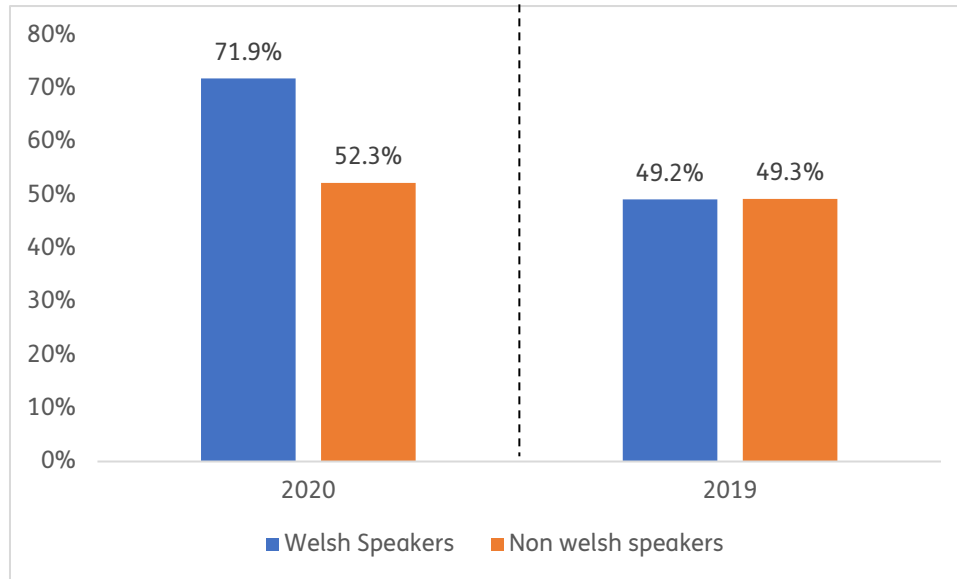
The highest participation rate in 2020 was in South West Wales, with 58.5% of respondents living there taking part in any art activities once a year or more often. This is followed by North Wales (57.5%), South Central Wales (56.7%) and South East Wales (50.8%). For indication, in 2019 participation was highest in the South East region (57.2%), followed by the South Central region (54.5%), the North region (44.8%) and the South West Region (42.2%).

Base: All Adults (2019: 1,002 & 2020: 1,002)

Source: Wales Omnibus Survey 2020

Welsh Language

Participation in arts activities by Welsh language (% once a year or more)



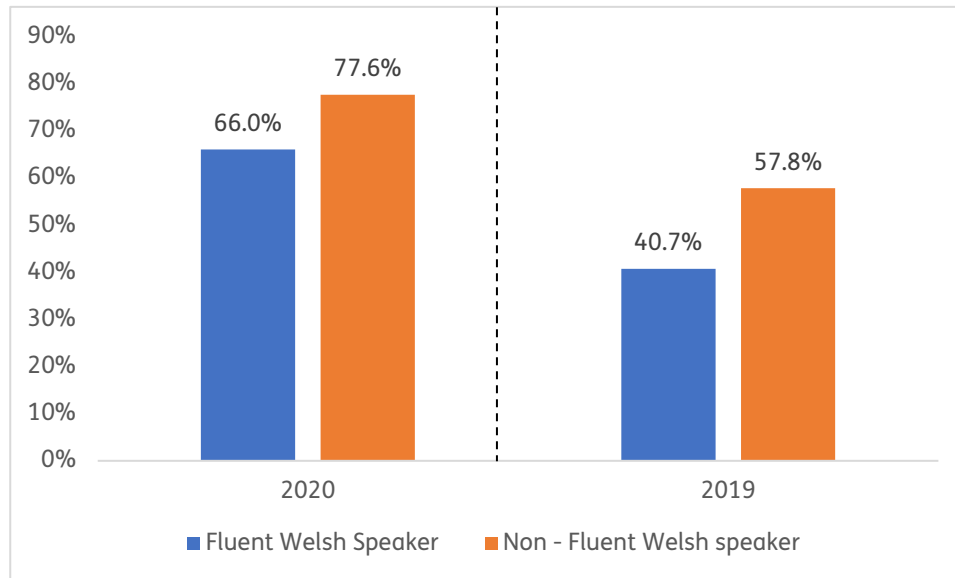
Welsh speakers were more likely to take part in artistic activities than Non Welsh speakers by 19.6 percentage points. Non Welsh speakers' participation was lower than the average.

This is the same pattern as in 2019, although participation in both groups was lower in 2020. In 2019, 92.3% of Welsh speakers of any level and 85% of Non Welsh speakers took part in arts activities at least once.

Base: All Adults (2019: 1,002 & 2020: 1,002)

Source: Wales Omnibus Survey 2020

Further breakdown of Welsh language and Attendance (% attending once a year or more)



Base: All Adults (2019: 1,002 & 2020: 1,002)

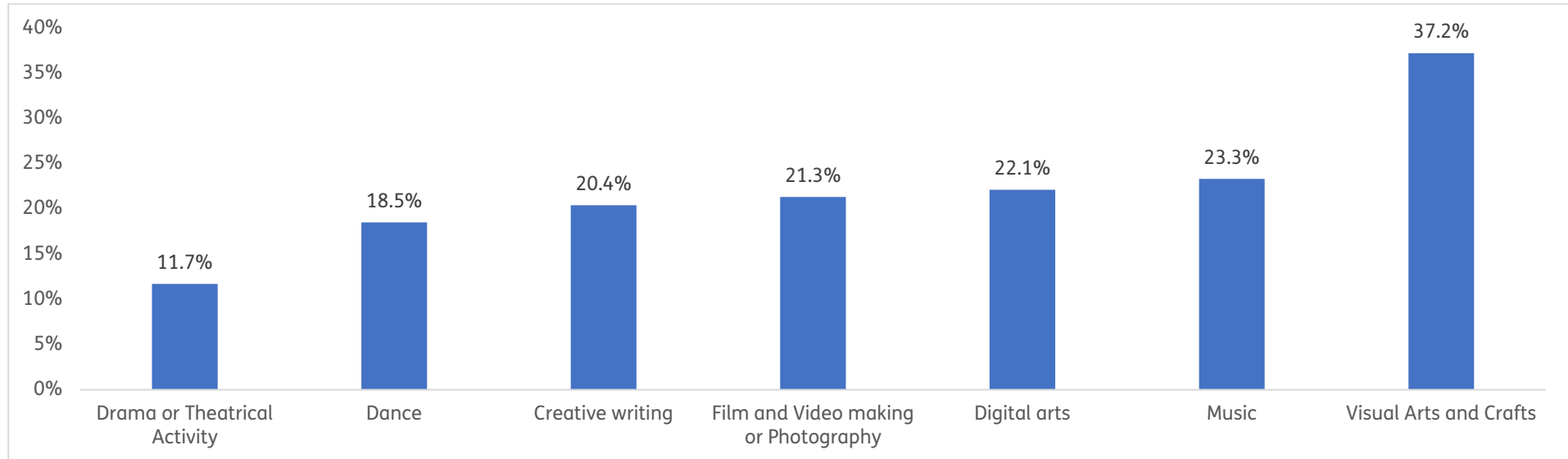
Source: Wales Omnibus Survey 2020

Among Welsh speakers, participation was highest among non-fluent speakers: 77.6% took part in artistic activities at least once in 2020. This 11.6 percentage points higher than participation among fluent Welsh speakers.

This is the same pattern as 2019, however participation was higher within both groups then: 97.2% of non-fluent Welsh speakers and 87.5% of fluent Welsh speakers took part in arts activities at least once in 2019.

Participation by Artforms

Participation in arts activities by artform (% taking part once a year or more)



Base: All Adults (2019: 1,002 & 2020: 1,002)

Source: Wales Omnibus Survey 2020

Visual arts and crafts were the artform most participated in, with 37.2% of respondents taking part at least once in 2020. Drama and theatrical activities saw the lowest participation, with 11.7% of adults taking part at least once in 2020.

This is a similar pattern to 2019. However, participation in almost all those artforms was higher in 2020, apart from Film and video making which was at 14.2% in 2019.

Table 5: Participation by artform

Artform	Percentage of adults taking part in least once in 2019
Drama	4.7%
Dance	8.1%
Creative Writing	11.5%
Digital Arts	13.1%
Film, Video & Photography	14.2%
Music	18.4%
Visual Arts & Crafts	28.2%

During 2020:

- Just over one in ten adults (11.7%) took part in drama or theatrical activities. As an indicator, 4.7% of adults took part in the previous year.
- Almost a fifth (18.5%) of adults took part in dance activities, in 2019, 8.7% took part in this activity.
- One fifth (20.4%) of adults took part in creative writing. A higher proportion of those who could speak Welsh took part in creative writing activities (35.8%) than those who were not Welsh speakers (16.1%).
- Just over a quarter of men, 26.3%, took part in digital arts activities compared to 18.1% of women, a gap of 8.2 percentage points. As an indicator, the gap between men and women’s participation in digital arts during 2019 was 3.2 percentage points.
- More adults in the ABC1 group took part in film and video making and photography activities, 22.9%, than those in the C2DE group, 19.5%, a gap of 3.4 percentage points. As a gage, the gap is slightly smaller than in 2019, when there was a gap of 4.9 percentage points, (16.6% of ABC1s and 11.7% of C2DEs).
- Welsh speakers had higher levels of participation in music activities with 43.5%, taking part once a year or more, compared to 17.7% of non Welsh speakers. As an indication, in 2019, 21.9% of Welsh speakers and 17.3% of non Welsh speakers took part in this artform.
- Visual arts and crafts were the most popular artforms to take part in with 37.2% of adults doing so at least once a year. While more men than women took part in this artform in both years the gap between the two was smaller in 2020 than in 2019 (if used as an indicator). In 2020, 41.7% of women took part compared to 32.3% of men, a gap of 9.4 percentage points. In 2019, 36.1% of women took part compared to 19.8% of men, a gap of 16.3 percentage points.

Appendix 1 - Social Grade Definitions

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

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

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

ABC1s –
professional,
qualified and
non-manual
occupations

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

Appendix 2 – 2020 Survey Questionnaire

SHOW CARD

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

Please use the card to help you answer.

READ OUT

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

- Once a week or more often
- 2 \ 3 times a month
- Once a month
- Once every 2 \ 3 months
- 2 \ 3 times a year
- Once a year
- Less often
- Never
- DK

Repeat for :

- Musicals (not opera)
- Opera
- Ballet
- Contemporary Dance performances
- Plays
- Classical Music Concerts or Recitals
- Jazz concerts or performances
- Folk, traditional or world music
- Other Live Music

- Art or craft galleries or exhibitions
- Readings, storytelling and other literary events
- Carnivals and street arts
- Arts Festivals, e.g. music, drama, literature, etc

SHOW CARD A AGAIN

Q2 About how often these days, if at all, do you take part yourself in your leisure time in any of the activities I am going to read out?
By 'take part' I mean in the home, in classes, rehearsals, shows or in workshops, other than as part of your job or full time education.

READ OUT

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

- Once a week or more often
- 2 \ 3 times a month
- Once a month
- Once every 2 \ 3 months
- 2 \ 3 times a year
- Once a year
- Less often
- Never
- DK

Repeat for:

- Drama or theatrical activity
- Dance activity of any kind
- Film and video making or photography other than family, holiday or party snaps.
- VISUAL ARTS AND CRAFTS, for example painting, sketching, computer graphics, pottery, wood-turning, jewellery making, weaving, textiles, knitting or sewing.

- CREATIVE WRITING, for example poetry or stories.
- DIGITAL ARTS: creating and making arts using digital technology e.g. uploading, creating or remixing arts related content (e.g. on YouTube, Flickr, etc.)

Frequency

The Arts Council of Wales includes questions on the Beaufort Research Adult Omnibus in November each year.

Terms and Definitions

Attendance is experiencing the arts as an audience member.

Participation is active involvement in the arts, such as attending workshops, classes or rehearsals.

Further Information

If you have any comments or queries on this data release or if you would like to be added to our regular users list then please contact our research team. Research@arts.wales

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Next Update

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Cyngor Celfyddydau Cymru
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