



Wolf Tales, Pickled Image Company, Bigyn Primary School, Llanelli,
Night Out Young Promoters Scheme (image: Karl Baker)

2011 Children's Omnibus Survey

Report on main findings



Arts Council of Wales is committed to making information available in large print, braille, audio and British Sign Language and will endeavour to provide information in languages other than Welsh or English on request.

Arts Council of Wales operates an equal opportunities policy.

Contents

	Page
1. Introduction.....	3
1.1 Background	3
1.2 Methodology.....	3
1.3 Notes on Data Presentation	3
2. Executive Summary	5
2.1 Arts Attendance.....	5
2.2 Arts Participation	6
3. Arts Attendance	8
3.1 Frequency of Attending Arts Events - Methodology.....	8
3.2 Frequency of Attending Arts Events	8
3.3 Attendance to Arts Events by Demographic Grouping	10
3.4 Summary of Arts Attendance by Art Form.....	14
3.5 Plays.....	16
3.6 Musicals	18
3.7 Opera	20
3.8 Classical Music Concerts	22
3.9 Other Live Music Concert.....	24
3.10 Dance	26
3.11 Art or Craft Gallery or Exhibition	28
3.12 Readings, Storytellings or other Literary Events	30
3.13 Carnivals and Street Arts.....	32
4. Participation in the Arts	34
4.1 Frequency of Participation in Artistic Activities - Methodology	34
4.2 Frequency of Participation in Arts Activities	34
4.3 Participation by Demographic Grouping.....	35
4.4 Summary of Arts Participation by Artistic Activity	39
4.5 Musical Activities	41
4.6 Drama and Theatrical Activity	43
4.7 Dance	45
4.8 Film or Video Making or Photography	47
4.9 Visual Arts and Crafts	49
4.10 Digital arts.....	51
4.11 Creative writing.....	54

Appendix 1: Socio-Economic Grade Definitions

Appendix 2: 2011 Survey Questionnaire

1. Introduction

1.1 Background

The Arts Council of Wales has conducted an annual attendance and participation research survey among children and young people every year since 2007. 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 Children's Omnibus survey each year. A copy of the questionnaire used to collect the information is appended to this report.

This report summarises the findings of the latest survey 2011 examining overall levels of attendance and participation in the arts as well as examining individual art forms. Both demographic and regional variations in attendance and participation are explored as part of the report as are key trends in the data over time.

1.2 Methodology

The Beaufort Research Children's Omnibus Survey takes place twice a year – in April and October. Each wave of research involves interviews with 500 children and young people aged 7 to 18. Each year of data discussed within this report is an amalgamation of the April and October surveys meaning that the sample size on a yearly basis is c.1,000. The survey is designed to be representative of 7 to 18 year olds in Wales. To achieve this quotas are set on the interviews conducted by region, age, gender and Welsh speaking ability reflective of Census proportions. The resulting data was also weighted to correct any minor imbalances in the sample, to ensure that it was representative of the Welsh population aged 7 to 18.

Interviews are conducted face to face in the homes of respondents utilising CAPI (Computer Aided Personal Interviewing) technology using Beaufort's team of experienced interviewers. All fieldwork was conducted in accordance with the MRS Code of Conduct and, specifically, the Guidelines for Conducting Research with Children and Young People.

The fieldwork for the 2011 research took place between 11 - 21 April 2011 and the 20 – 30 October 2011. In total 1,003 interviews were conducted.

1.3 Notes on Data Presentation

The data is presented in a series of line and bar charts, which show the percentage of children and young people who have attended, or taken part in, each of the activities asked about in the survey. The results are also split out by key demographic groupings and region, again showing the percentage of each demographic group or region who have attended or taken part in each activity. Where frequency of attendance and participation is presented throughout the report it refers to a rate of

once a year or more unless otherwise stated. It is also worth noting the regional definitions referred to throughout the report are the Arts Council of Wales definitions of region, which are as follows:

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

2. Executive Summary

2.1 Arts Attendance

- Around three-quarters (73%) of 7 to 18 year olds in Wales attended at least one arts event, once a year or more often¹. This was consistent with typical levels across the last five years and represented a small increase of two percentage points from 2010.
- The above participation level is very similar to that recorded on the most recent adult survey, 74%, albeit based on yearly attendance at 14 different art forms.
- Carnivals and Street Arts was added as a ninth art form in 2010 and when this activity is taken into account overall yearly attendance rises to 80%.
- To a certain extent arts attendance among children and young people is correlated with social grade. Children who live in households of higher social grade, ABC1s, were more likely to attend arts events² than their C2DE counterparts – 86% having done so once a year or more often compared with 73% for C2DEs.
- Younger children (7 to 10s) were also more likely to have been to an arts event. Attendance levels were 10 percentage points higher (85%) than was the case for 16 to 18 year olds (75%).
- Encouragingly, the gender gap in terms of attendance at the arts more than halved in 2011 with attendance among boys (77%) only slightly lower than that of girls (82%).
- Conversely, the gap between Welsh and non-Welsh speakers has widened in 2011 from six to ten percentage points with attendance among Welsh speakers reaching 86%.
- The above finding reflects, to a certain extent regional changes between 2010 and 2011, with attendance in the North rising by 10 percentage points to 87% and thus now has the highest attendance level of any region.
- Plays and Carnivals and Street Arts remain the art forms that are most likely to be attended by 7 to 18 year olds, with 45% and 41% respectively attending once a year or more often.
- Around 1 in 3 children and young people attend Live Music (non-Classical), Musicals and Art/Craft Galleries and Exhibitions.

¹ Based on the 8 art forms asked about since 2007

² Based on the 9 art forms asked about since 2010

- Overall, attendance at most art forms stay consistent with 2010 or record small increases, the largest being Literary events and Other Live Music where attendance increases by three percentage points.
- For the majority of art forms, attendance was more likely to occur outside of the school / college environment. The exceptions to this were Plays and Literary events where a majority attended via a school / college organised event.

2.2 Arts Participation

- The latest survey finds that four fifths (81%) of 7 to 18 year olds in Wales take part in at least one of the seven artistic activities once a year or more often. This was an increase of five percentage points compared with 2010 and marks a return to more typical levels following the decline in the previous year.
- Children and young people from ABC1 household remain more likely to have participated in the arts than their C2DE counterparts – 85% vs. 78%. However, the gap between the two groups (seven percentage points) has narrowed since 2010.
- Those aged 16 to 18 were less likely to participate in artistic activities than younger children. Around two-thirds (64%) do so at least once a year and this compares with 85% among 11 to 15s and 90% among 7 to 10s.
- The above is partly explained by the fact that some 16 to 18 years are now outside of a school / college environment where much of the participation takes place.
- Participation in the arts among boys and girls were at similar levels – 80% and 82% respectively. This gender gap had narrowed from five percentage points in 2010. This mirrors the finding for attendance.
- In terms of region, the increase in participation was most marked in the North (as it was for attendance) with a 15 percentage point uplift to 89% giving it the highest participation rate. Levels also increased in the South, from 74% to 78%, but participation levels remain the lowest in this region, although now only slightly below Mid & West Wales (81%).
- Both Welsh speakers and non-Welsh speakers have recorded increases in participation levels in the last year (to 90% and 75% respectively). However, growth has been greatest among Welsh speakers widening the gap in participation between the two groups to 15 percentage points, as was the case for attendance.

- Creative Writing and Visual Arts & Craft were the most popular participatory art forms among young people with 56% and 50% respectively taking part at least once a year. This was closely followed by Musical activities (46%).
- Drama and Theatrical Activity (37%) and Digital Arts (34%) record yearly participation rates of around 1 in 3 children and young people. Even those art forms with the lowest participation rates, Dance (22%), Film or Video Making or Photography (19%) have a significant minority of 7 to 18 year olds taking part.
- Encouragingly, participation levels in all individual art forms were consistent with or improve upon 2010 levels. The largest increases were seen for Creative Writing and Film or Video Making or Photography, both of which increased by six percentage points.
- Whilst for some art forms there was a mix of activity taking place within the school / college environment and outside of it, overall, in contrast to attendance, more activity takes place within the school / college setting. This was particularly true for Creative Writing, Visual Arts and Crafts and Dance.
- Finally, it is also worth noting that whilst the report tends to compare at least yearly participation rates in each art form, participation is a much more frequent activity than just once a year for most of those taking part.

3. Arts Attendance

3.1 Frequency of Attending Arts Events - Methodology

This section of the report focuses on arts attendance. Respondents were asked to describe their attendance to art events by indicating how often they attend each of the following nine artforms:

- a. **Plays**
- b. **Musicals**
- c. **Opera**
- d. **Classical music**
- e. **Other live music**
- f. **Dance performances**
- g. **Art or craft galleries or exhibitions**
- h. **Readings, storytellings and other literary Events**
- i. **Carnivals and street arts***

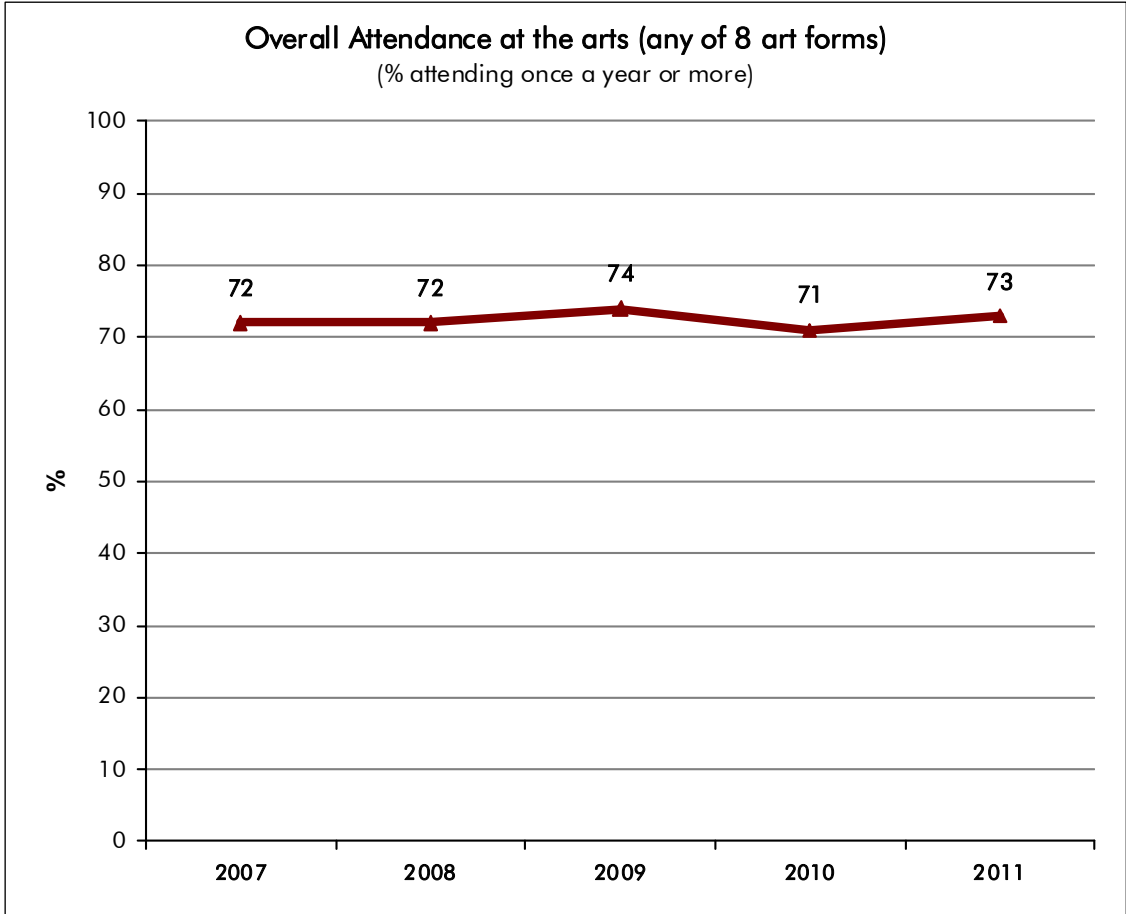
* denotes artform added in 2010

This section of the report will summarise overall attendance at the arts, as measured by attendance to *any* artform, and will describe demographic and regional variations in overall attendance to help understand what sort of children and young people are most likely to attend the arts. The report will then go on to look at attendance to each artform individually.

When considering the overall attendance figures, it should be noted that the list of artforms asked about in the survey changed in 2010 when Carnivals and street arts was added. Therefore, when examining five year trends in overall attendance (section 3.2) comparisons will be based on attendance at any of the 8 consistent art forms across this period. However, when examining regional and demographic differences during 2010 and 2011 (section 3.3) comparisons will be based on the full 9 art forms included during this period.

3.2 Frequency of Attending Arts Events

The 2011 survey found that 73% of children and young people in Wales attended at least one of the eight arts events once a year or more often. This level was typical of that recorded over the past 5 years. The latest finding is a slight increase from 71% in 2010, reversing a small decline from 74% in 2009.



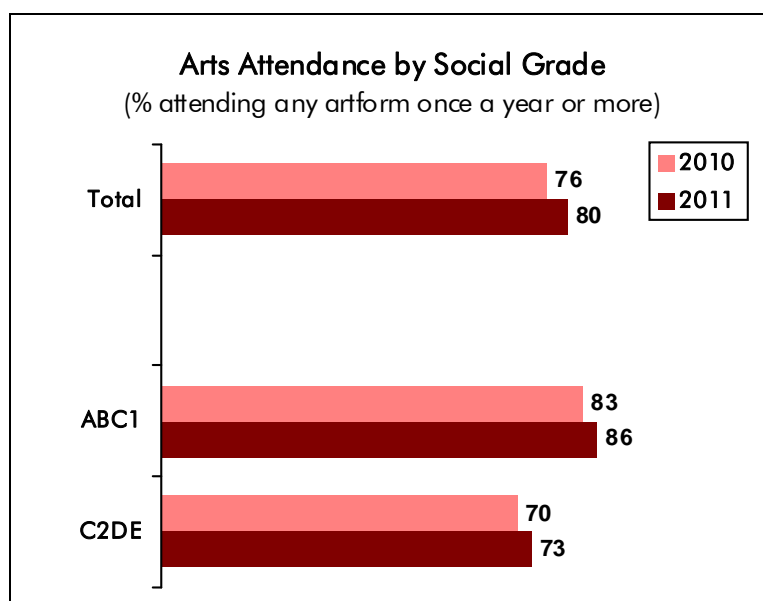
Base: All 7-18 yr olds (at least 1,000 per wave) Source: Children's Omnibus survey 2007 - 2011

If we include Carnivals and Street arts in the above analysis, we find that in 2011, overall attendance rates increase to 80%.

3.3 Attendance to Arts Events by Demographic Grouping

This section of the report looks at the differences in overall arts attendance by demographic group and region, and charts the proportion of children and young people in each key group that attend an arts event once a year or more often. The data is presented for 2011 and 2010 and each chart also shows the overall total attendance figures to any of the 9 art forms asked about for comparison:

3.3.1 By Social Grade

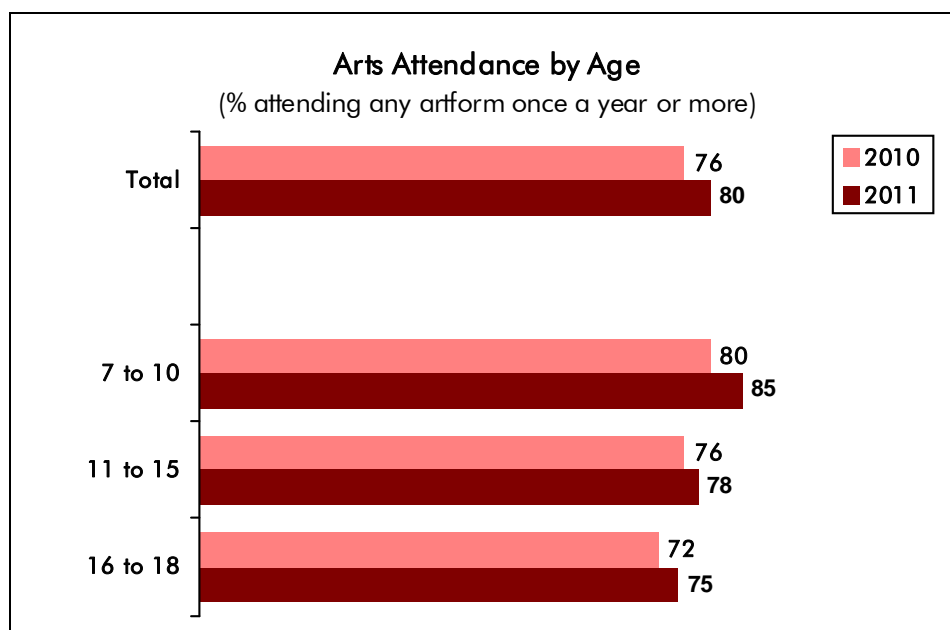


Base: All 7 to 18s (2010: 1,003, 2011: 1,003) Source: Children's Omnibus survey 2010-2011

To a certain extent arts attendance was correlated with social grade. Children who live in households of higher social grade, ABC1s, remain more likely to attend arts events than their C2DE counterparts – 86% having done so once a year or more often compared with 73% for C2DEs. Both groups have increased by three percentage points since 2010 meaning the gap between the two has remained constant (at 13 percentage points).

This gap was at a similar level to that found for adults. In the latest survey (2011) the gap between ABC1s and C2DEs for overall attendance at the arts (based on attendance at any one of 14 art forms) was 16 percentage points (83% and 67% respectively).

3.3.2 By Age



Base: All 7 to 18s (2010: 1,003, 2011: 1,003) Source: Children's Omnibus survey 2010-2011

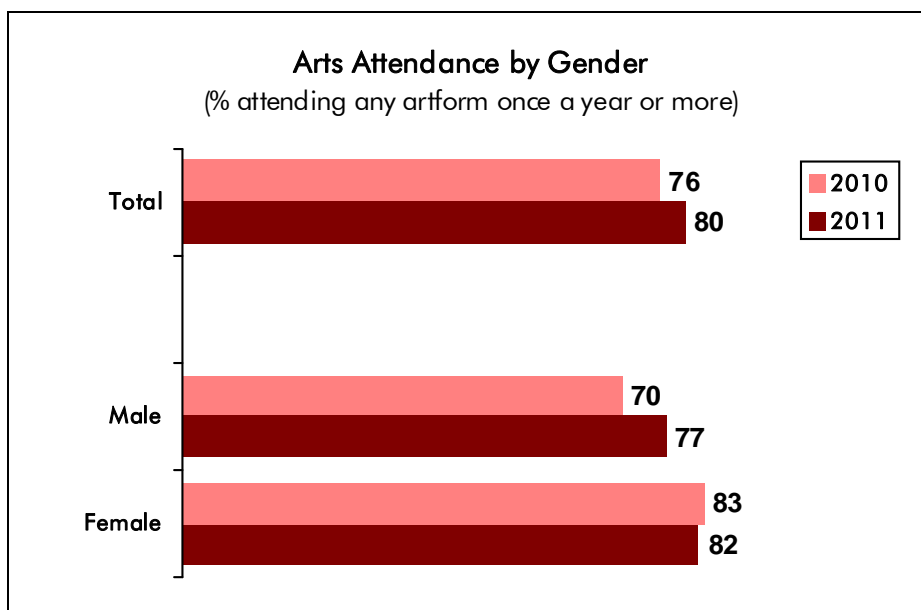
Although the differences were not extreme there appeared to be some relationship between age and arts attendance – the younger the child, the more likely they were to attend arts events. Overall attendance levels among 7 to 10 year olds (85%) were ten percentage points higher than 16 to 18 year olds.

Whilst all groups witnessed an increase in attendance levels this was greatest among 7 to 10s (+ five percentage points) meaning the gap in attendance between the youngest and oldest age group had widened slightly in 2011.

3.3.3 By Gender

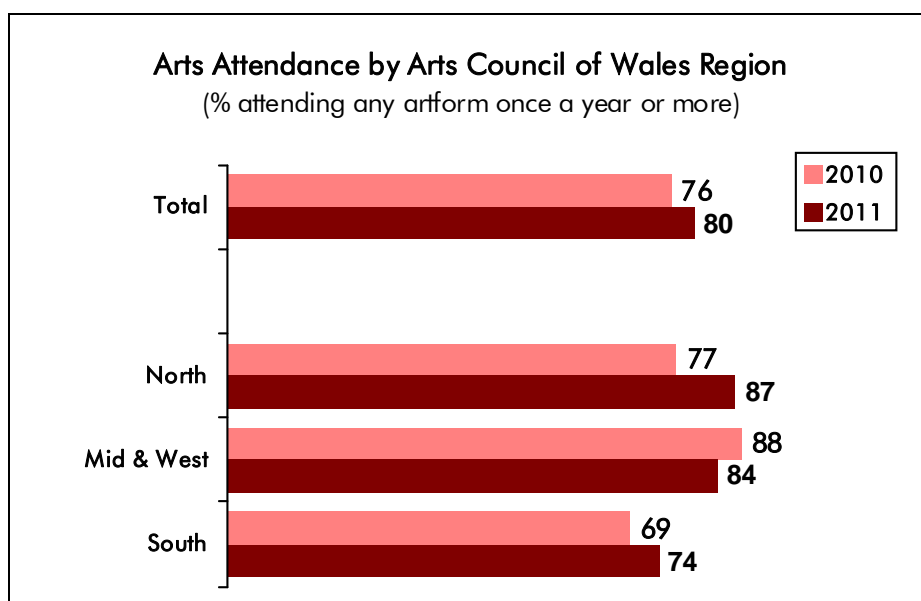
Yearly attendance levels at art events remain higher among girls than boys in 2011 – 82% vs. 77%. However, an increase of seven percentage points among boys and a small decrease among girls (one percentage point) means that the gender gap in attendance has more than halved relative to 2010.

This analysis also reveals that the overall increase in 2011 (76% to 80%) is driven by boys.



Base: All 7 to 18s (2010: 1,003, 2011: 1,003) Source: Children's Omnibus survey 2010-2011

3.3.4 By Region

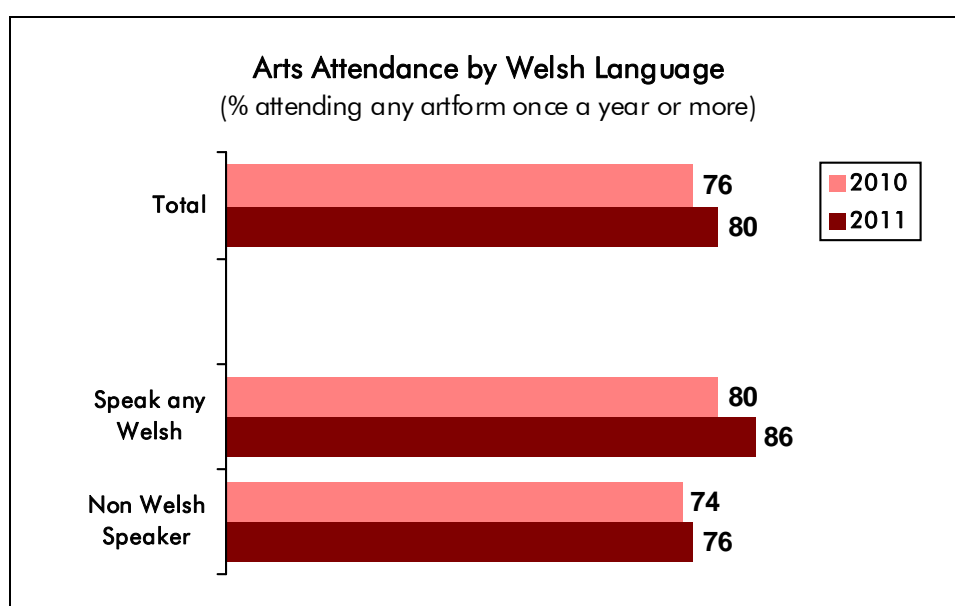


Base: All 7 to 18s (2010: 1,003, 2011: 1,003) Source: Children's Omnibus survey 2010-2011

Overall attendance at arts events was higher among children and young people living in North and Mid & West Wales (87% and 84% respectively) than those living in the South (74%).

This lower level in the South is consistent with the overall picture in 2010, although the South has increased by five percentage points in the latest period. Change has also occurred in the other two regions with attendance levels in the North increasing by ten percentage points meaning it is now the leading region whilst Mid & West Wales levels have decreased by four percentage points.

3.3.5 By Welsh Language



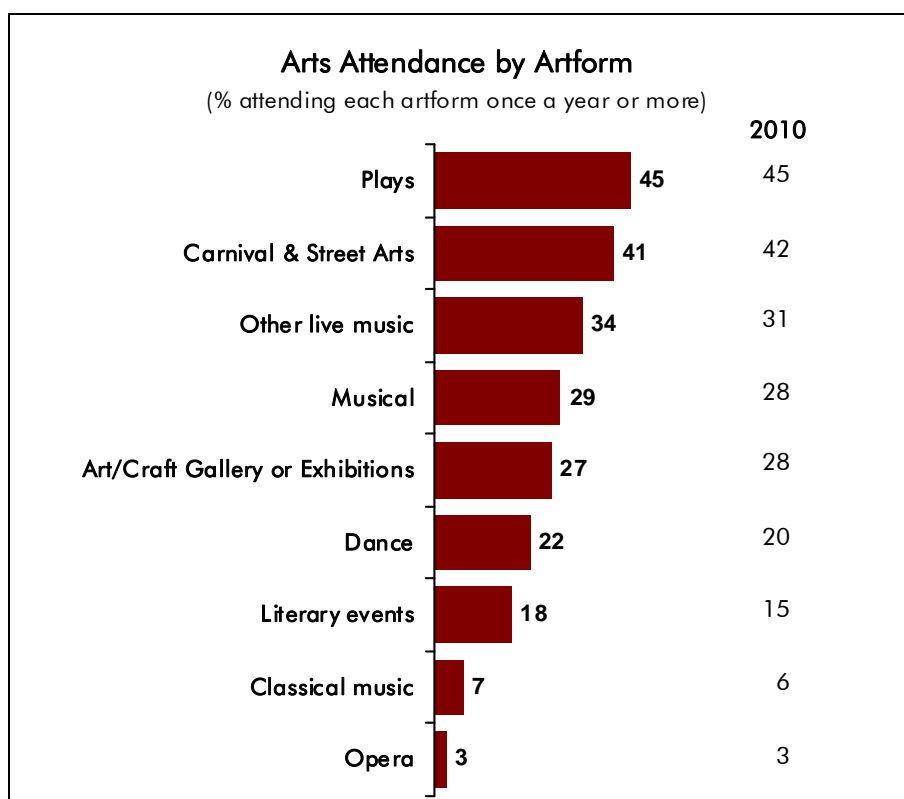
Base: All 7 to 18s (2010: 1,003, 2011: 1,003) Source: Children's Omnibus survey 2010-2011

Whilst both Welsh speakers and non-Welsh speakers have recorded rises in overall attendance levels in 2011, the increase was greater among Welsh speakers – up six percentage points to 86%. As such the gap in attendance between the two groups has widened a little in 2011 to ten percentage points (from six).

The findings to a certain extent reflect regional changes which saw a rise in attendance in North Wales.

3.4 Summary of Arts Attendance by Art Form

Now turning to the individual art forms being attended, the following chart shows the proportion of children and young people who attend each art form once a year or more often. The chart shows the most recent findings from the 2011 survey and also shows the 2010 findings for comparison as a column next to the bar chart:



Base: All 7 to 18s (2010: 1,003, 2011: 1,003) Source: Children's Omnibus survey 2010-2011

The next section of the report will look in more detail at each art form in turn, examining the trends in attendance over the last five years and looking at any demographic and regional variations. In summary, the chart above shows at least yearly attendance at most art forms were at similar levels to those recorded in the previous year.

The most popular art forms (in terms of attendance) among children and young people were Plays (45%) and Carnival and Street Arts (41%). This was consistent with 2010. Around 1 in 3 children and young people attend Live Music (non-Classical), Musicals and Art/Craft Galleries and Exhibitions.

Classical Music and Opera recorded the lowest attendance levels of those art forms measured by the survey.

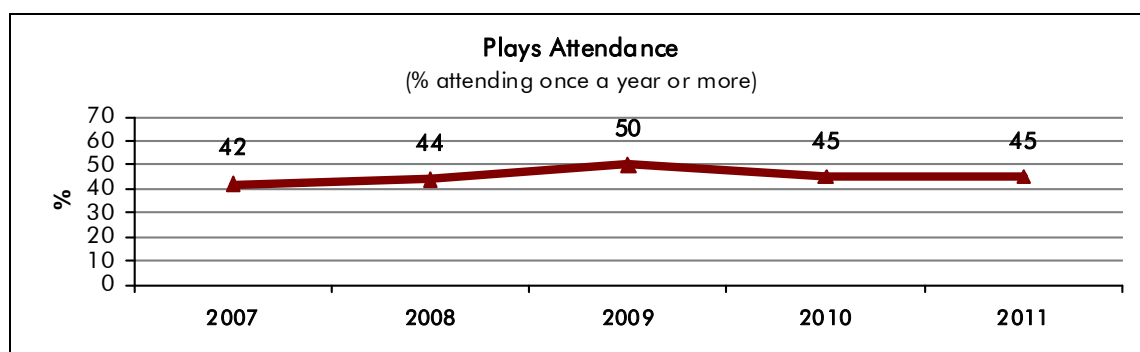
It is also worth pointing out that whilst the above figures (and most others in this report) deal with an at least yearly measure of attendance, for many of this group attendance occurs more often than just once a year. In most cases around one third

to a half of all those attending each art form at least once a year are doing so just once, with the remainder doing so on a more frequent basis.

3.5 Plays

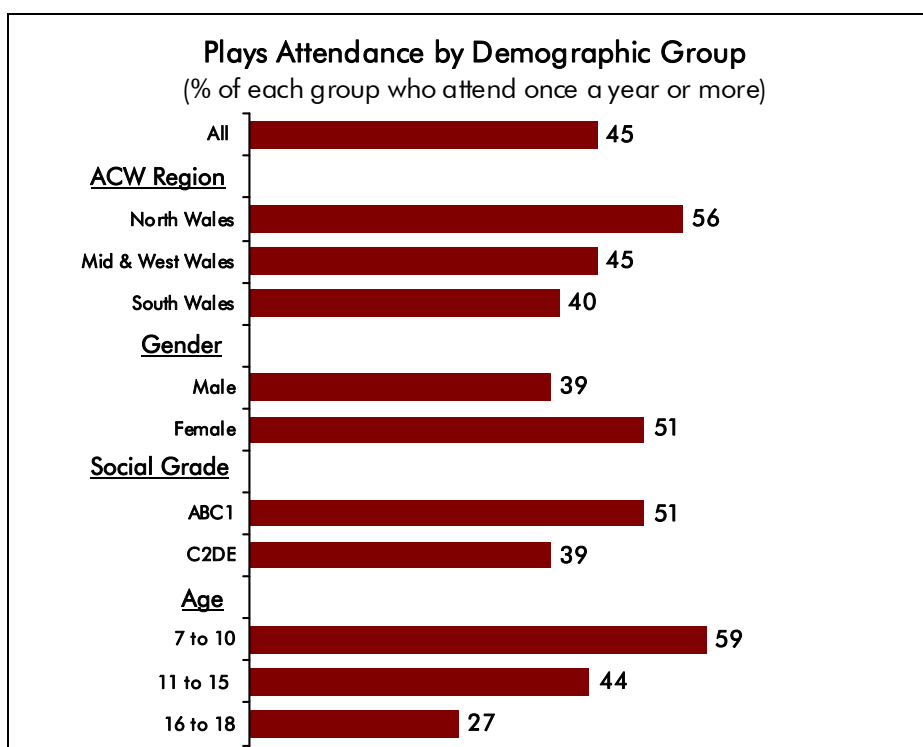
Slightly under half (45%) of children and young people aged 7 to 18 have attended a Play at least once a year according to the latest survey. This figure matches that recorded in the previous year and represents consolidation, following a fall of five percentage points from the peak attendance level reported in 2009.

This level represents a considerably higher figure than attendance levels reported among adults which stood at 27% (once a year or more often) in the latest equivalent survey.



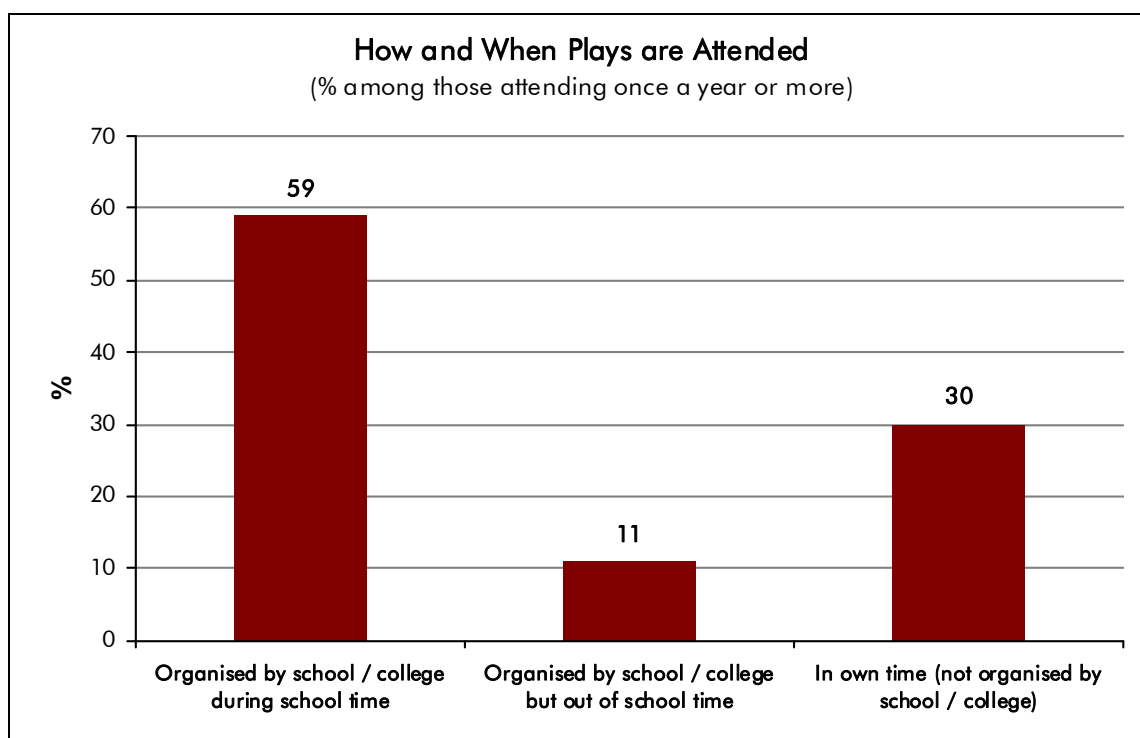
Base: All 7-18 yr olds (at least 1,000 per wave) Source: Children's Omnibus survey 2007 - 2011

Attendance at Plays is strongly correlated with age. Attendance levels among the youngest age group, 7 to 10, were more than double that recorded for the older age group, 16 to 18s – 59% compared with 27% respectively. A very similar pattern was recorded in 2010.



Base: All 7 to 18 year olds (1,003) Source: Children's Omnibus survey 2011

- In addition to differences by age, social grade also appeared to influence attendance at Plays. Children from households classified as higher social grades, ABC1 (51%) were more likely than those in the C2DE households (39%) to attend, mirroring findings from 2010.
- Similarly, girls were more likely to attend Plays than boys (51% vs. 39%) and again this was similar to the finding recorded in the previous year.
- Those living in South were the least likely to attend a Play (40%), as they were in 2010. However, whilst a year ago those living in North and Mid & West Wales were equally likely to attend (both 48%), the latest survey finds that attendance was more prevalent in North Wales (56% vs. 45% in Mid & West Wales).

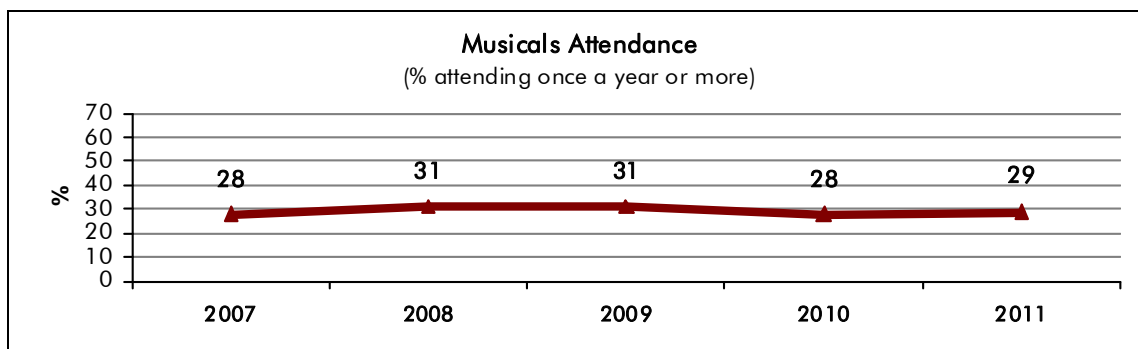


Base: Those attending Plays once a year or more often Source: Children's Omnibus survey 2011

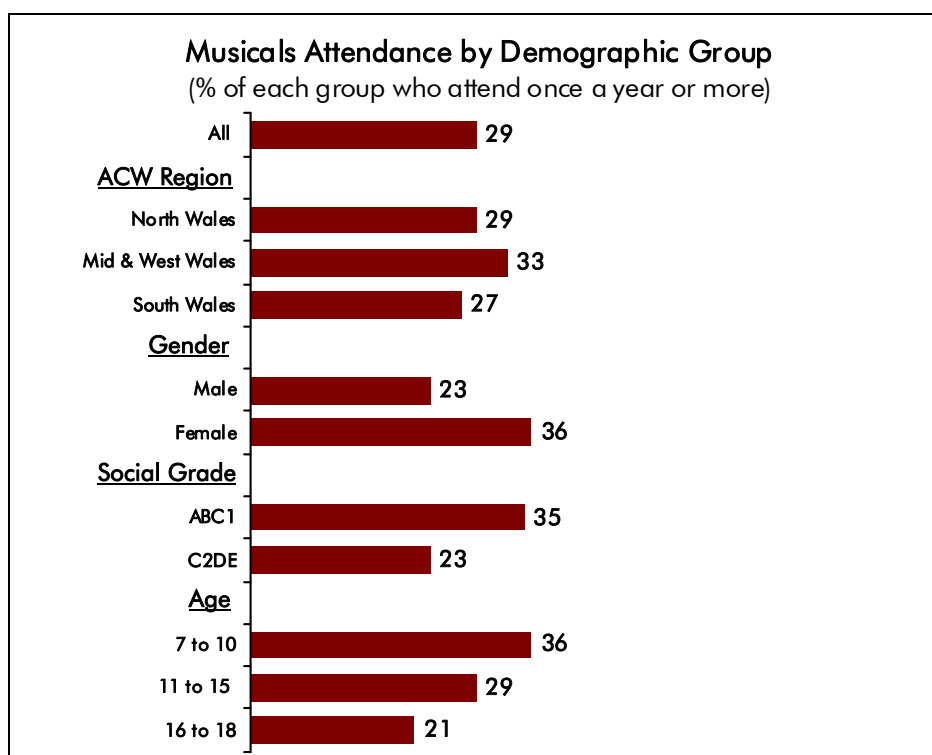
Among those who attend Plays once a year or more often, the majority of this tends to be organised by schools / college - around 70% of those attending do so via schools with majority of this (59%) taking place during school hours. Around 30% of children and young people attending plays do so outside of the school environment.

3.6 Musicals

Around 3 in 10 (29%) children and young people attend Musicals at least once a year. This level was typical of that recorded over the past five years. It remains higher than equivalent attendance levels for adults which stands at 22%.



Base: All 7-18 yr olds (at least 1,000 per wave) Source: Children's Omnibus survey 2007 - 2011

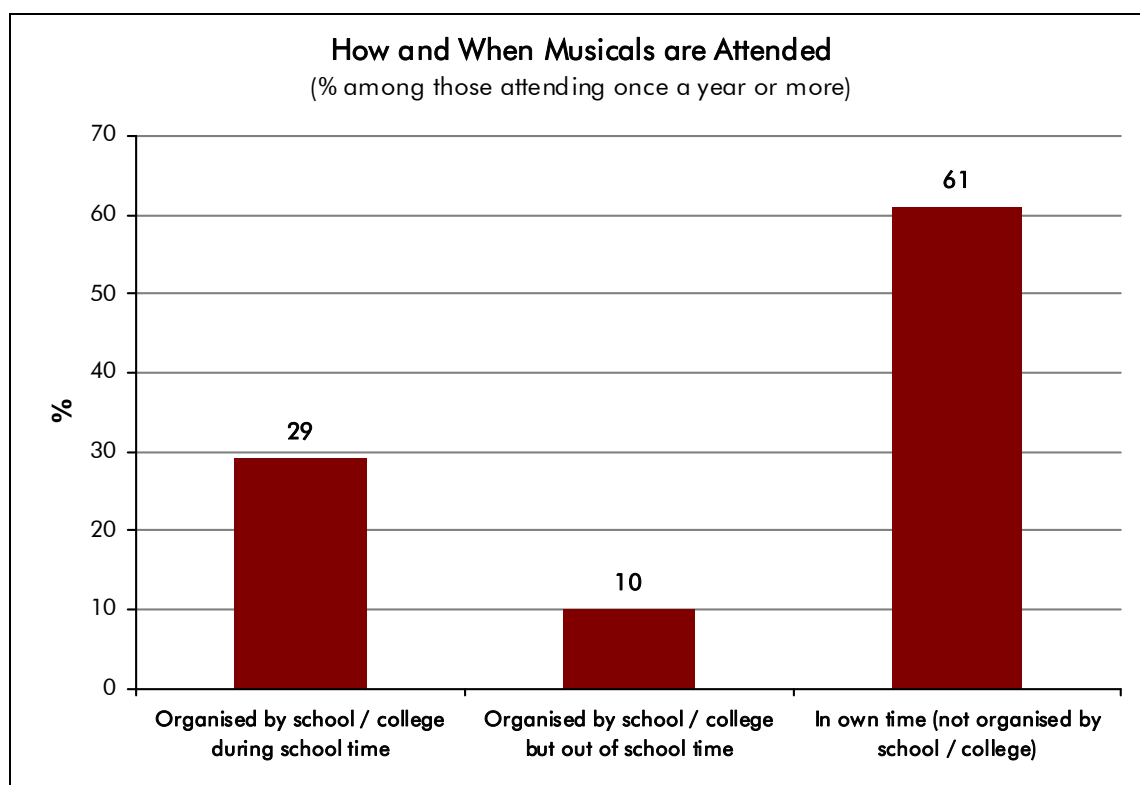


Base: All 7 to 18 year olds (1,003) Source: Children's Omnibus survey 2011

- Demographic differences in attendance at Musicals followed a similar pattern to that recorded for Plays. Like Plays, yearly attendance was higher among girls (36%) than boys (23%) and higher among ABC1s (35%) than C2DEs. This pattern was consistent with 2010 findings, although the gap between boys and girls has narrowed slightly (13 percentage points from 17 in 2010).
- In addition, attendance was again correlated with age, with the younger age group (7 to 10) being most likely to attend – 36%. This was also the case in 2010, although the gap between the youngest and oldest age group has

increased slightly in 2011 (15 percentage points compared with 11 percentage points in 2010).

- Differences by region were less pronounced but those living in Mid & West Wales (33%) were more likely to attend than other regions. An increase of five percentage points (24% to 29%) has seen North Wales switch position with South Wales (down 1 percentage point to 27%).

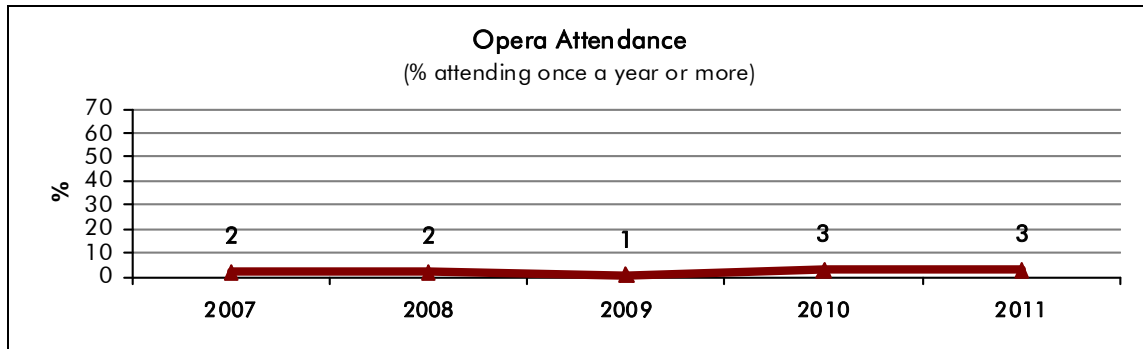


Base: Those attending Musicals once a year or more often Source: Children's Omnibus survey 2011

In contrast to Plays, attendance at Musicals was more likely to be in children and young people's own time. Around 6 in 10 of those attending Musicals organised this 'themselves' in their own time rather than being part of a school based activity.

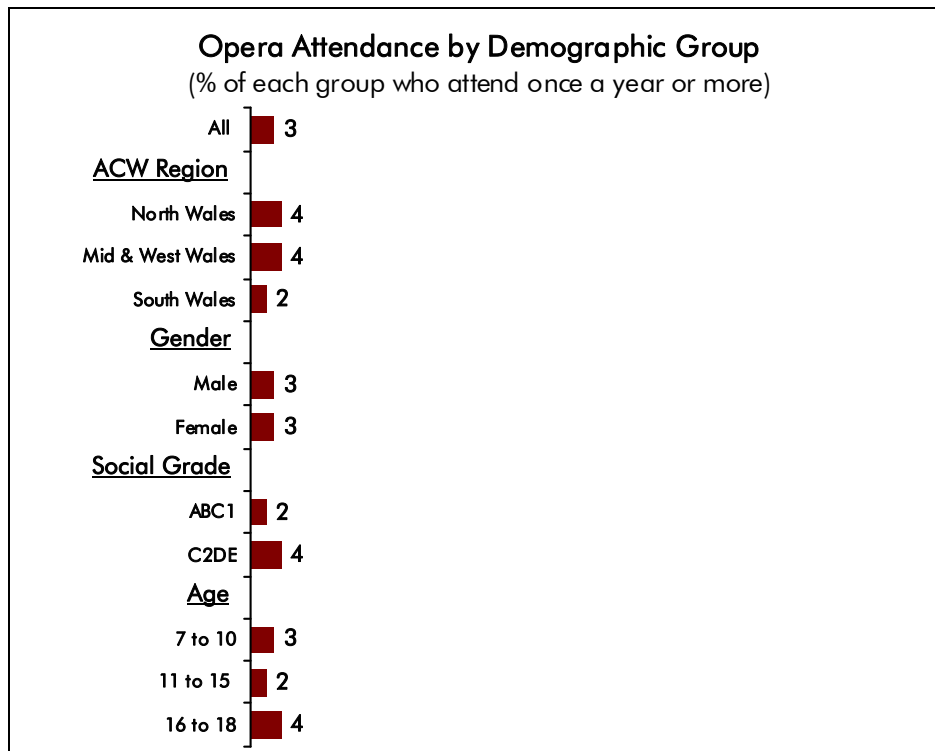
3.7 Opera

As might be expected attendance at Opera among 7 to 18 year olds was at low levels. The latest survey recorded a yearly attendance level of 3% - the same as in 2010. However, this was only slightly behind the proportion of Welsh adults attending the Opera once a year or more (5%)



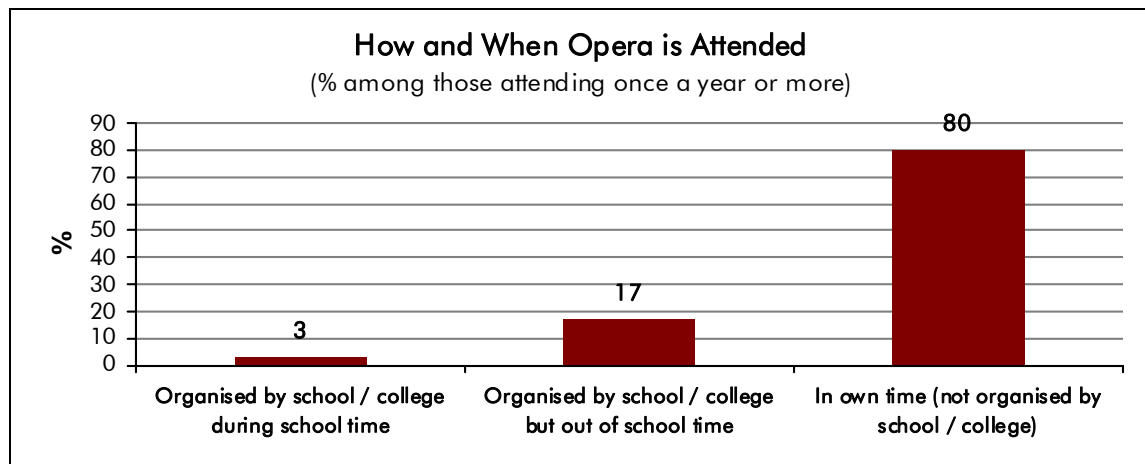
Base: All 7-18 yr olds (at least 1,000 per wave) Source: Children's Omnibus survey 2007 - 2011

Among all demographic groups attendance at the Opera varies between 2% and 4% and thus no firm conclusions can be drawn.



Base: All 7 to 18 year olds (1,003) Source: Children's Omnibus survey 2011

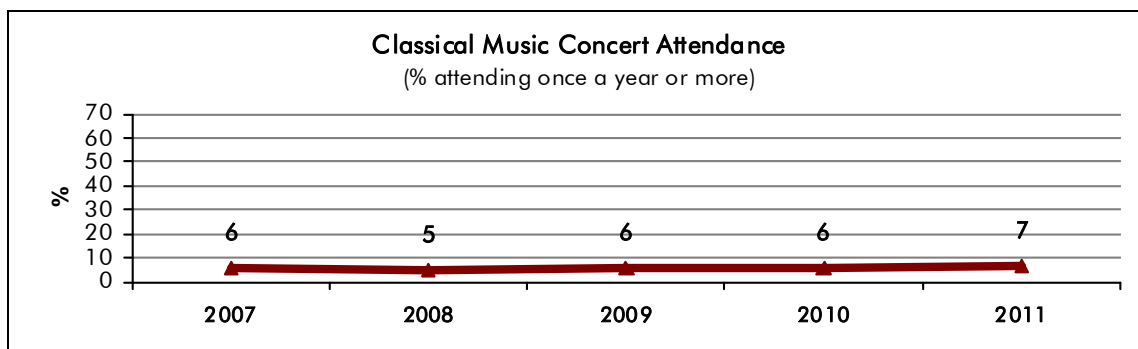
Of the few who do attend Opera, in the majority of cases this tends to be done outside of the school environment as the chart below shows.



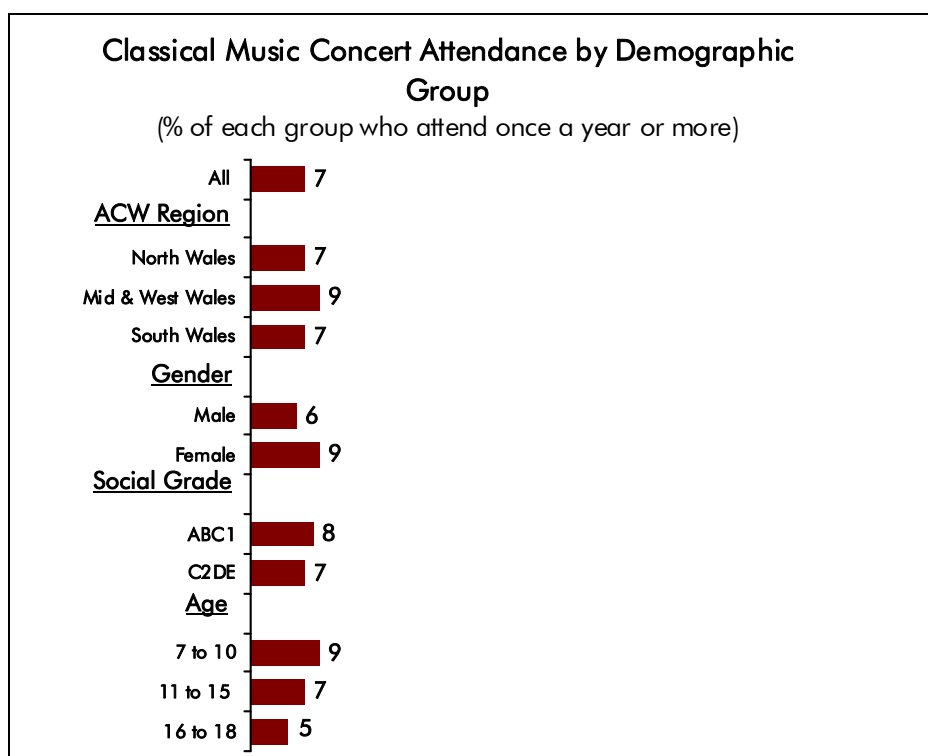
Base: Those attending Opera once a year or more often Source: Children's Omnibus survey 2011

3.8 Classical Music Concerts

Attendance at Classical Music Concerts has been relatively consistent across the five years of the survey. The latest figure of 7% continues this trend but does represent the highest recorded figure to date. This level is around half of the equivalent adults attendance level which stood at 12% in 2011.



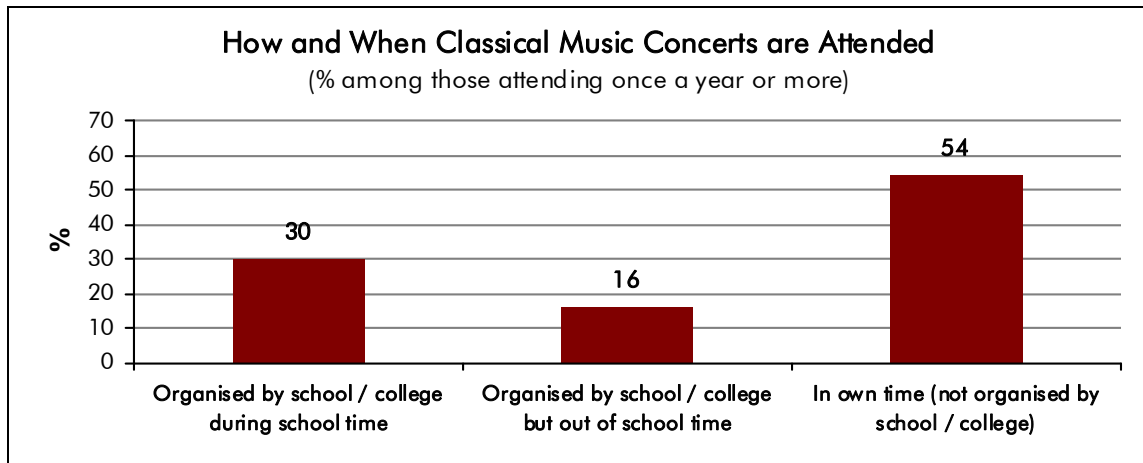
Base: All 7-18 yr olds (at least 1,000 per wave) Source: Children's Omnibus survey 2007 - 2011



Base: All 7 to 18 year olds (1,003) Source: Children's Omnibus survey 2011

- Again those in the younger age group (7 to 10) were most likely to attend a Classical Music concert – 9% vs. 7% for 11 to 15s and 5% for 16 to 18s. This represented a reversal of the situation in 2010 when the older age group were more likely to attend.
- Girls were slightly more likely to attend Classical Music concerts than boys (9% vs. 6%) whereas in 2010 there was more parity (5% boys, 6% girls).

- There was little difference in attendance by social grade (8% ABC1, 7% C2DE) and this represented a considerable narrowing of the gap between the two groups since 2010 when equivalent figures were 9% and 3% respectively.
- Attendance levels by region also showed greater consistency in 2011 – Mid & West Wales remained the highest at 9% but increases of four percentage points in the North and two percentage points in the South meant other regions were now much closer.



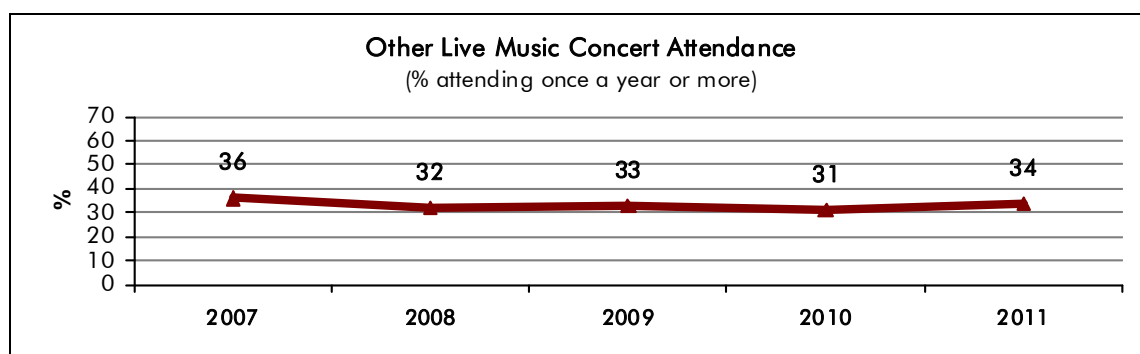
Base: Those attending Classical Music Concerts once a year or more often Source: Children's Omnibus survey 2011

As was the case in 2010, there was a relatively even split as to whether Classical Music concerts were attended as part of a school / college trip (46%) or outside of this environment (54%).

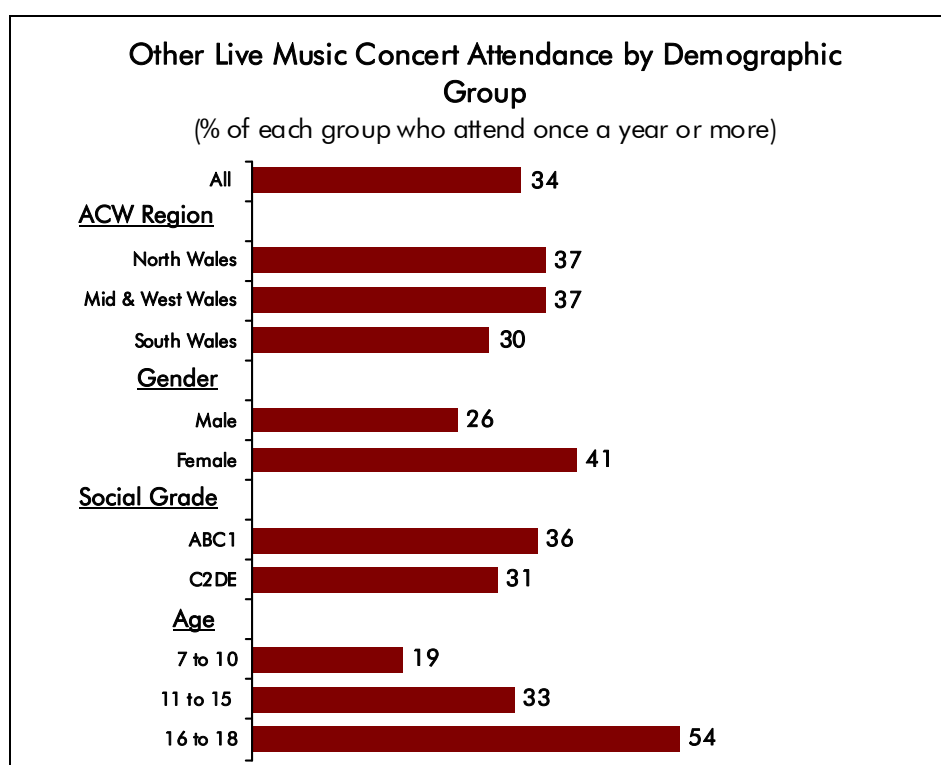
If trips to Classical Music concerts were organised by the school this was more likely to be during school hours (30%) rather than outside of it (16%).

3.9 Other Live Music Concert

Just over a third (34%) of children and young people had attended a Live Music concert (non-classical) once a year or more often. This was an increase of three percentage points from 2010 reversing a similar small decline from 2009. This was slightly lower than the proportion of adults who attend the same art form yearly (41% in 2011).



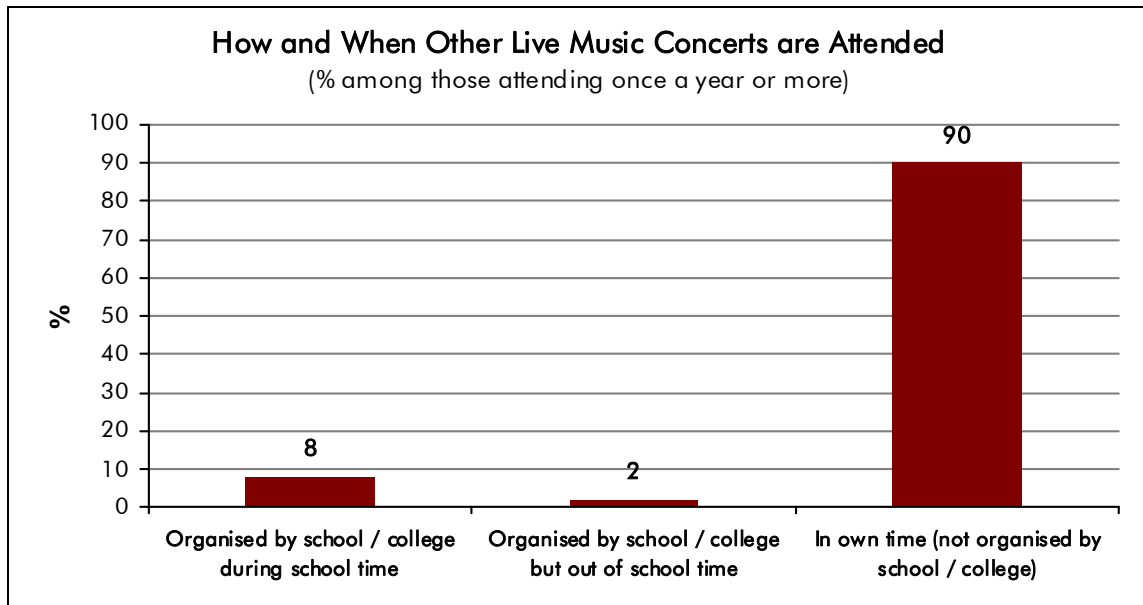
Base: All 7-18 yr olds (at least 1,000 per wave) Source: Children's Omnibus survey 2007 - 2011



Base: All 7 to 18 year olds (1,003) Source: Children's Omnibus survey 2011

- Like other arts forms, attendance at Other Live Music concerts was correlated with age. However, in this instance it was the older group (16 to 18 year olds) who were much more likely to attend (54% compared with 33% for 11 to 15s and 19% for 7 to 10s).
- Girls were more likely to attend Other Live Music concerts than boys (41% compared with 26%) and this gap was slightly higher than that recorded in 2010 (12 percentage points).

- Those in higher social grades, ABC1s were more likely to attend than C2DEs (36% vs 31%), but at five percentage points the gap between the two groups was considerably narrower than in 2010 (13 percentage points).
- Attendance at Other Live Music events was similar although those in South Wales were slightly less likely to attend than other regions (30% vs. 37%). This was a slight contrast to 2010 when attendance levels among the regions were almost identical.

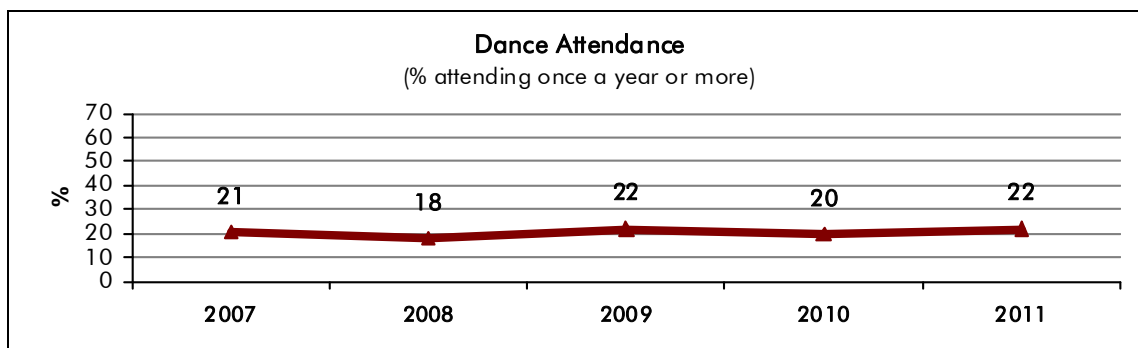


Base: Those attending Other Live Music Concerts once a year or more often Source: Children's Omnibus survey 2011

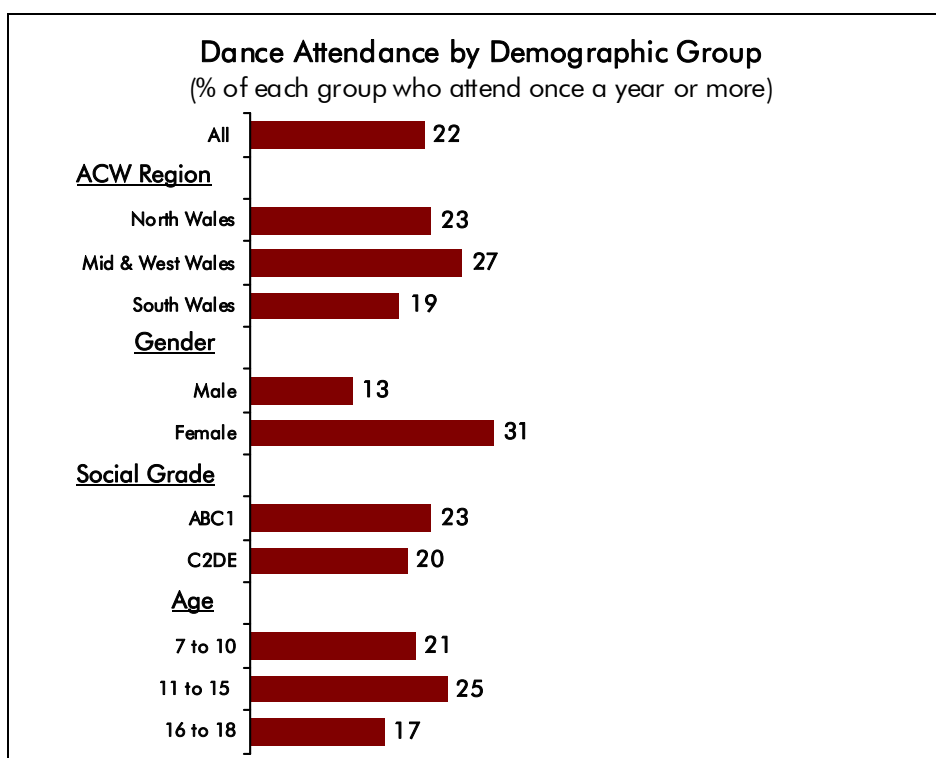
Attendance at Other Live Music concert tends to be very much an out of school event - 90% of those attending do so in their own time and this consistent with previous years.

3.10 Dance

Just over a fifth (22%) of children and young people had attended Dance once a year or more often. This was an increase of two percentage points from 2010 and returns to the level recorded in 2009.



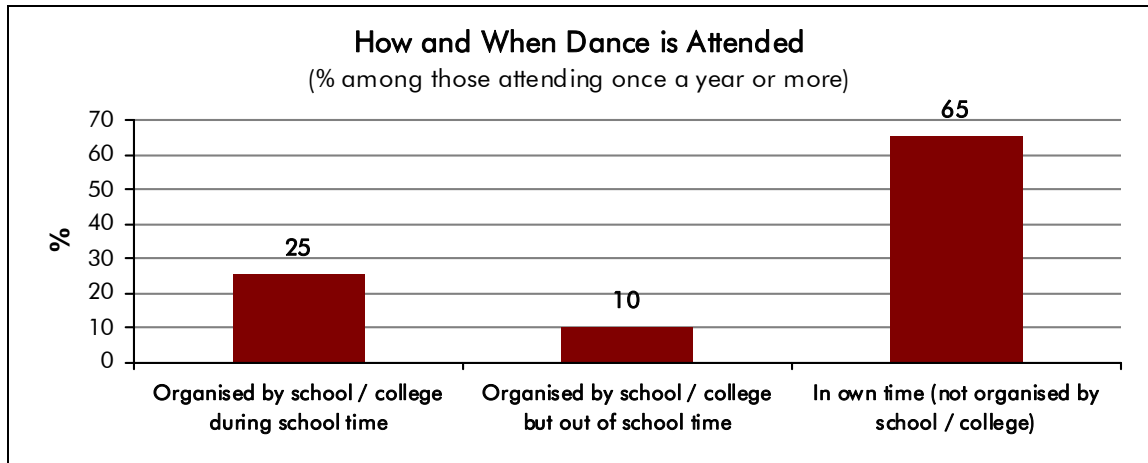
Base: All 7-18 yr olds (at least 1,000 per wave) Source: Children's Omnibus survey 2007 - 2011



Base: All 7 to 18 year olds (1,003) Source: Children's Omnibus survey 2011

- Gender was the biggest differentiator of attendance at Dance, with girls (31%) being more than twice as likely to attend at least yearly as boys (13%). This was similar to the result in 2010
- ABC1s were slightly more likely to attend than C2DEs (23% vs. 20%), but again there was a narrowing of the gap between the two groups – three percentage points from eight percentage points in 2010.

- Those living in Mid & West Wales remain the most likely to attend, although North Wales has closed the gap by increasing six percentage points to 23% yearly attendance.
- Although, differences by age were not as pronounced as for some other art forms, those aged 11 to 15 were most likely to attend Dance events (25%).



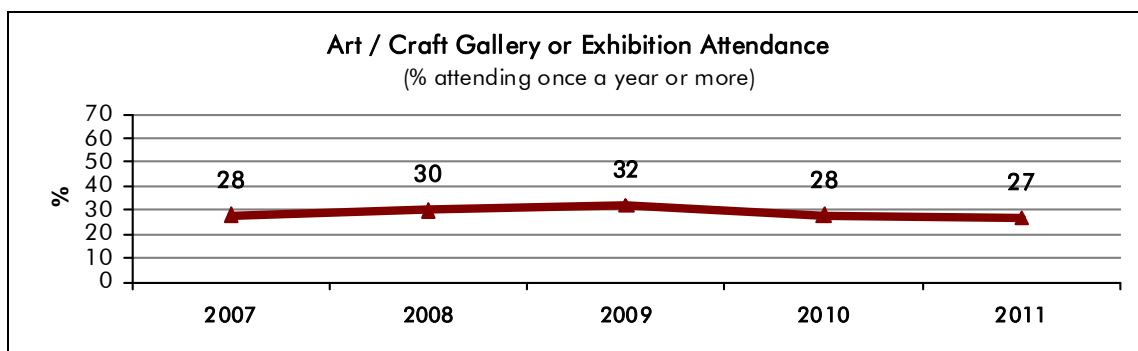
Base: Those attending Dance once a year or more often Source: Children's Omnibus survey 2011

Two-thirds (65%) of those attending Dance events do so in their own time. Of the remaining third who attend via the school, this was more likely to be inside (25%) rather than outside (10%) school hours.

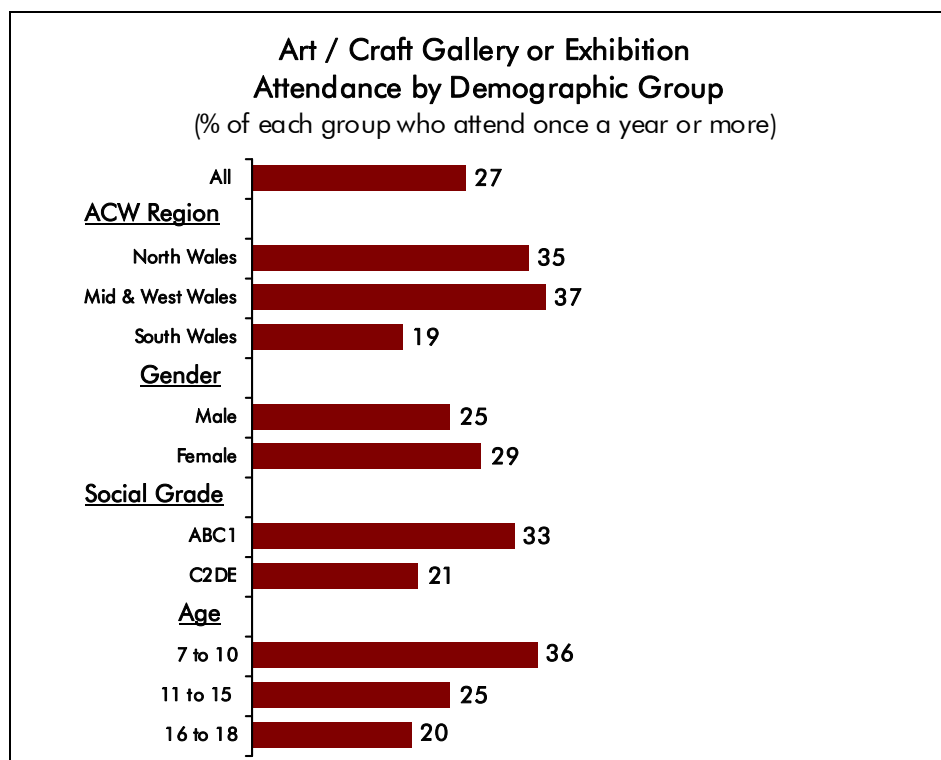
3.11 Art or Craft Gallery or Exhibition

Just over a quarter (27%) of children and young people had attended an Art or Craft Gallery or Exhibition once a year or more. Overall, there appears to have been a slight decline in attendance at this art form since 2009 during which time attendance peaked at 32%.

Attendance levels among children and young people were very similar to that recorded for adults in the most recent survey (29%).



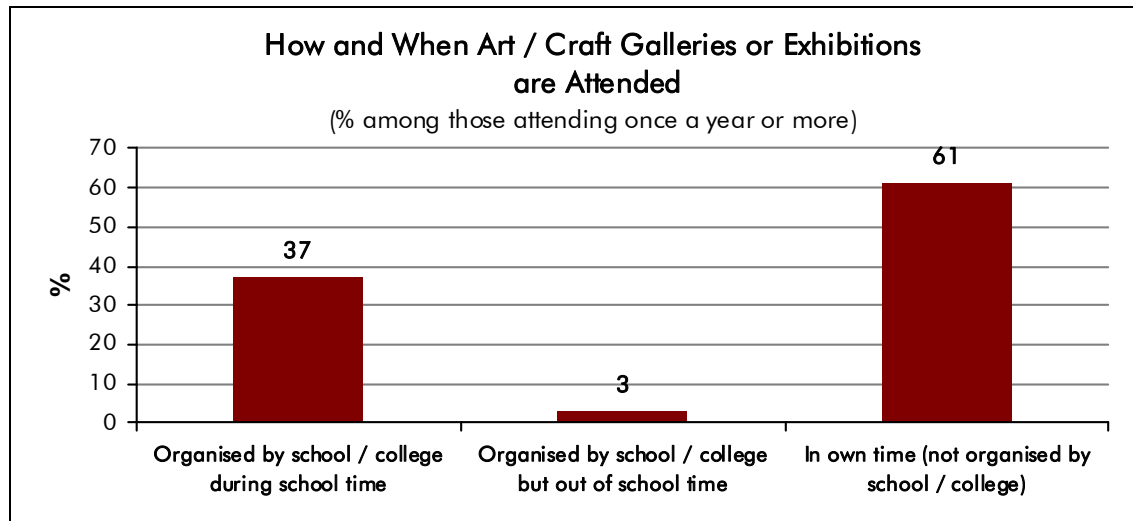
Base: All 7-18 yr olds (at least 1,000 per wave) Source: Children's Omnibus survey 2007 - 2011



Base: All 7 to 18 year olds (1,003) Source: Children's Omnibus survey 2011

- Attendance at an Art or Craft Gallery or Exhibition was much more prevalent among children in ABC1 households – 33% compared with 21% for C2DEs. This was very similar to the proportions recorded in 2010.
- Those in the younger age group (7 to 10) were also much more likely to attend than their older counterparts – 36% compared with 20% for 16 to 18s and again this mirrored 2010.

- Differences by gender were less apparent with girls only slightly more likely to attend than boys – 29% vs. 25%.
- In terms of region, those living in Mid & West Wales remained most likely to attend (37%), but an increase of eight percentage points since 2010 meant that the proportion attending in North Wales was now much closer to this level (35%). In contrast the proportion attending Art or Craft Galleries or Exhibitions in South Wales had declined seven percentage points to 19%.

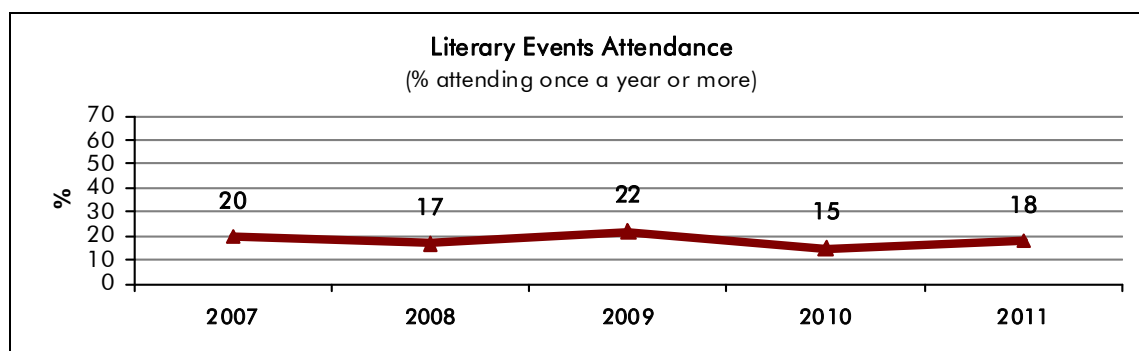


Base: Those attending Art or Craft Gallery or Exhibitions once a year or more often Source: Children's Omnibus survey 2011

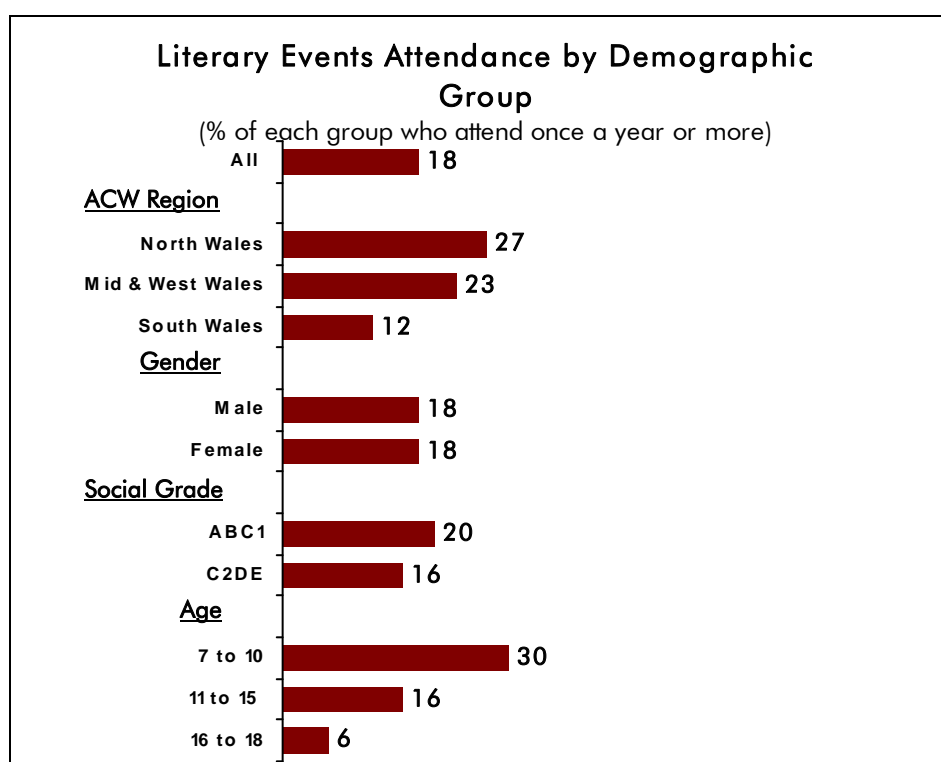
Of those attending Art or Craft Galleries or Exhibitions, there was a mix of those attending via school / college – 40% (with most of these during school time) and those attending in their own time, not organised by school / college (61%).

3.12 Readings, Storytellings or other Literary Events

Following a sharp decline in 2010 (seven percentage points) the proportion of children and young people attending Reading, Storytellings and other Literary events has recovered somewhat in 2011. It has increased three percentage points to 18%. This is well in excess of the level recorded among adults (7%).



Base: All 7-18 yr olds (at least 1,000 per wave) Source: Children's Omnibus survey 2007 - 2011

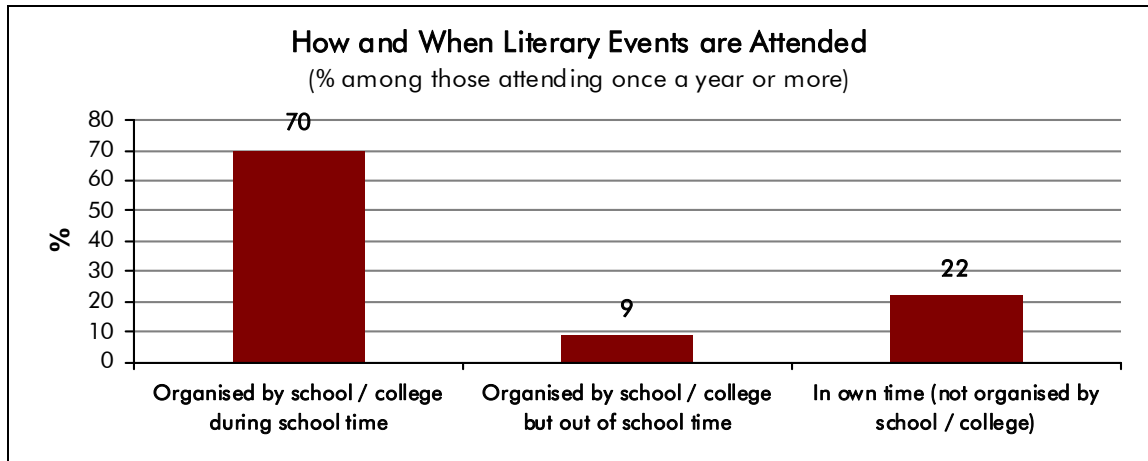


Base: All 7 to 18 year olds (1,003) Source: Children's Omnibus survey 2011

- Attendance at Literary events was much more prevalent among the younger age group – 3 in 10 (30%) of 7 to 10 year olds attended once a year or more often. Around half this proportion (16%) of 11 to 15s and only 6% of 16 to 18 year olds attended similar events.
- Attendance at Literary events did not show any difference by gender (both boys and girls at 18%) and social grade was also not a great differentiator on this

occasion (ABC1 20%, C2DE 16%). This was similar to the findings recorded in 2010.

- Differences by region were, however, more apparent with those in South Wales being much less likely to attend Literary events (12%) than their counterparts in North (27%) and Mid & West (23%) Wales. This pattern was also the case in 2010.



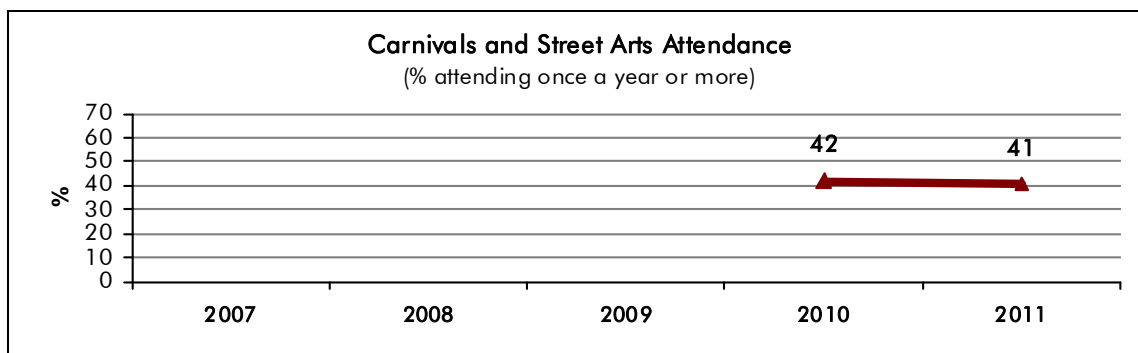
Base: Those attending Literary Events once a year or more often Source: Children's Omnibus survey 2011

Literary events were more likely to be attended via school / college (79%) and most of this was in school time (70%) rather than outside school hours (9%). Around a fifth (22%) of those attending Literary events did so in their own time independent of school.

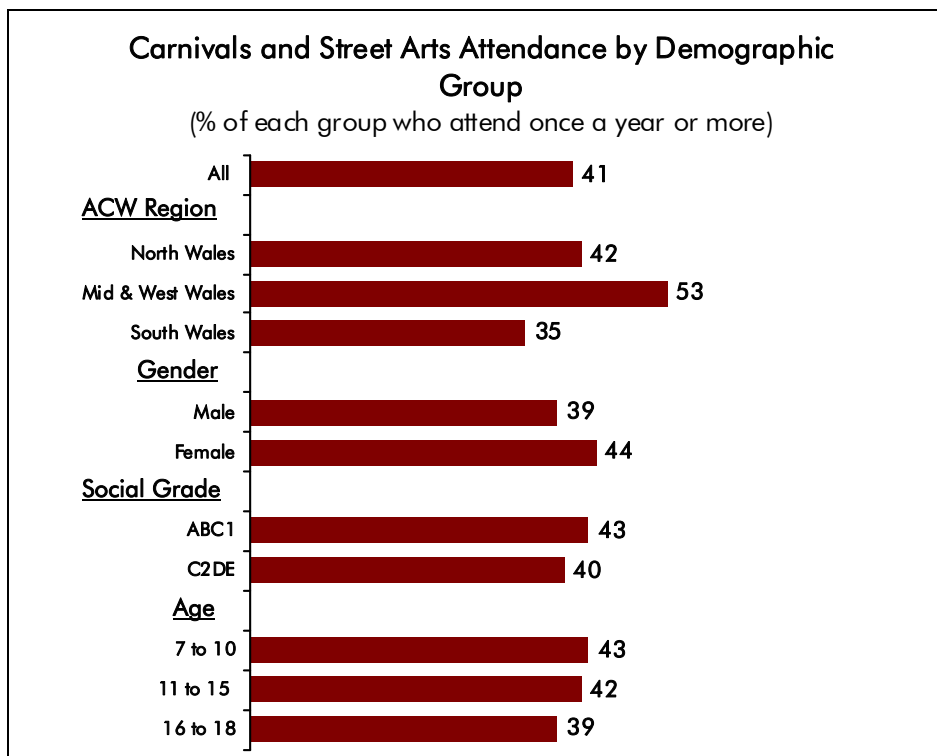
3.13 Carnivals and Street Arts

Attendance at Carnivals and Street Arts has only been measured during the last two years. In both 2010 and 2011, the survey has found that around two-fifths of children and young people attend this art form at least once a year.

This is higher than that recorded for adults which stands at 31%.



Base: All 7-18 yr olds (at least 1,000 per wave) Source: Children's Omnibus survey 2007 - 2011

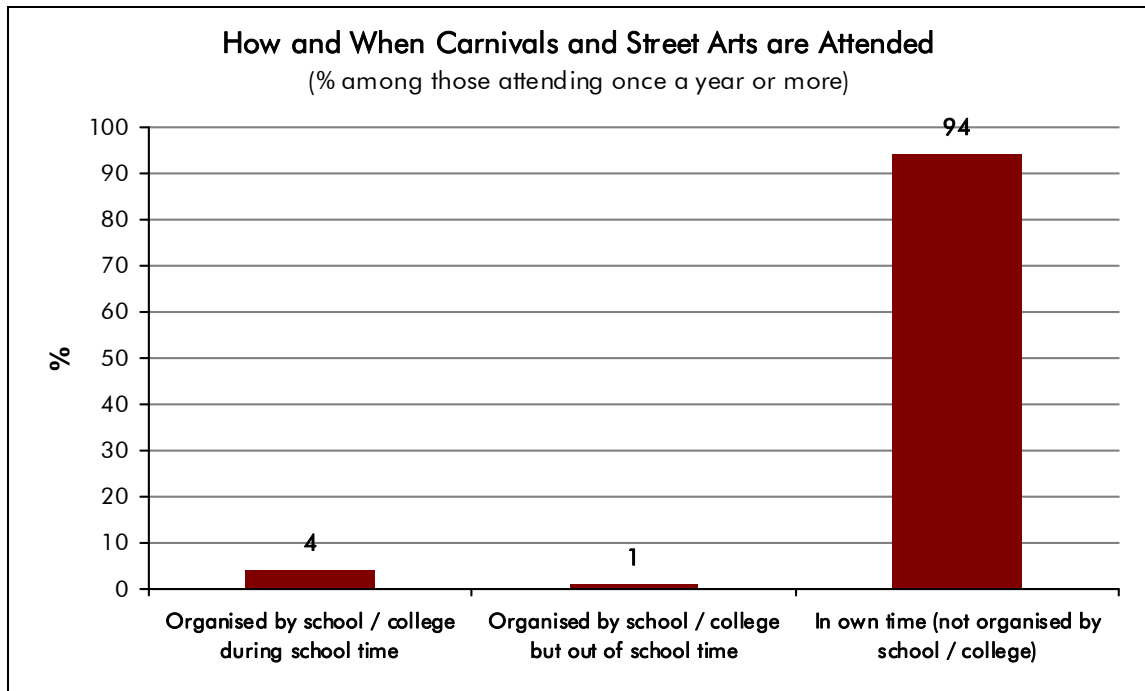


Base: All 7 to 18 year olds (1,003) Source: Children's Omnibus survey 2011

- Attendance by different demographic groups tends to show less variation than for most other art forms, with most groups being close to the average attendance level of 41%.
- In order for this to be the case, the 2011 findings have seen a narrowing of the gap between social grade groupings (from nine percentage points to three percentage points) and a similar coming together of the age groups –

attendance among 16 to 18 year olds has risen from 30% to 39%, whereas levels among the other two groups have declined by four percentage points.

- Region represents the one area where there were considerable differences between attendance at Carnivals and Street Arts, with those in Mid & West Wales (53%) being more likely to attend than those living in the North (42%) and South (35%). This was consistent with the picture found in 2010.



Base: Those attending Carnivals and Street Arts once a year or more often Source: Children's Omnibus survey 2011

Attendance at Carnivals and Street Arts was almost entirely independent of schools / colleges - 94% of those attending did so in their own time and this reflects 2010 findings.

4. Participation in the Arts

4.1 Frequency of Participation in Artistic Activities - Methodology

Respondents were asked to describe their participation in the arts by indicating how often they took part in each of these seven artistic activities:

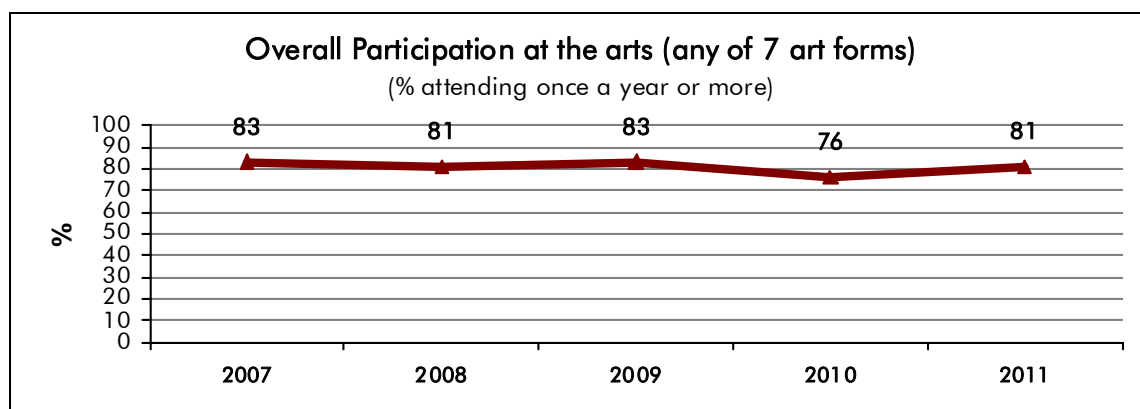
- a. **Music activities** such as singing or playing an instrument
- b. **Drama or theatrical activity** for example acting, directing or technical work
- c. **Dance activity** (not disco / clubbing)
- d. **Film and video making, or photography**
- e. **Visual arts and crafts** for example painting or textiles
- f. **Digital arts**, for example creating and making arts using digital technology e.g. uploading, creating or remixing arts related content (e.g. on YouTube, Flickr, etc)*
- g. **Creative writing**, for example poetry or stories

This section of the report will summarise participation in *any* of these artistic activities and examine overall participation by demographic group and region. The report will then go on to look at participation in each activity individually.

It should be noted that the surveys up to 2009 asked about media arts as opposed to digital arts which was introduced in 2010. Whilst broadly examining a similar type of activity, media arts was defined as website design and working with your PC, whereas digital arts was slightly more tightly defined as described above. The latter, as section 4.10 details tends to record lower levels of participation (as it is more tightly defined) and this needs to be borne in mind when comparing five year trend data which for all periods is based on the seven art forms surveyed at each point.

4.2 Frequency of Participation in Arts Activities

Other than in 2010, overall yearly participation levels have remained remarkably consistent. The most recent 2011 survey data reveals that four fifths (81%) of 7 to 18 year olds in Wales take part in at least one of the seven artistic activities once a year or more often. This represents a five percentage point increase from 2010 and marks a return to levels more typical of those recorded in previous years.



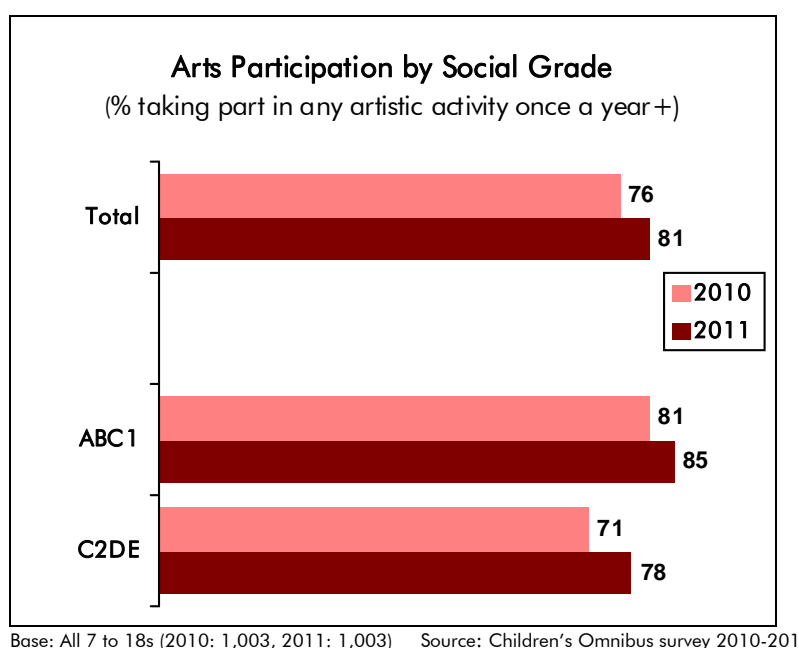
Base: All 7-18 yr olds (at least 1,000 per wave) Source: Children's Omnibus survey 2007 - 2011

4.3 Participation by Demographic Grouping

The following section of the report looks at the differences in overall arts participation by demographic group and region, charting the proportion of 7 to 18 year olds in each key grouping that take part in any artistic activity. Results are shown for both 2010 and 2011 and on the basis of the seven activities

The total participation level in any of the seven activities is shown at the top of each chart.

4.3.1 By Social Grade



Children and young people from ABC1 household remain more likely to have participated in the arts than their C2DE counterparts. Both groups record increases in participation since 2010, but the difference was greater among C2DEs meaning that the gap between the two groups has narrowed to seven percentage points.

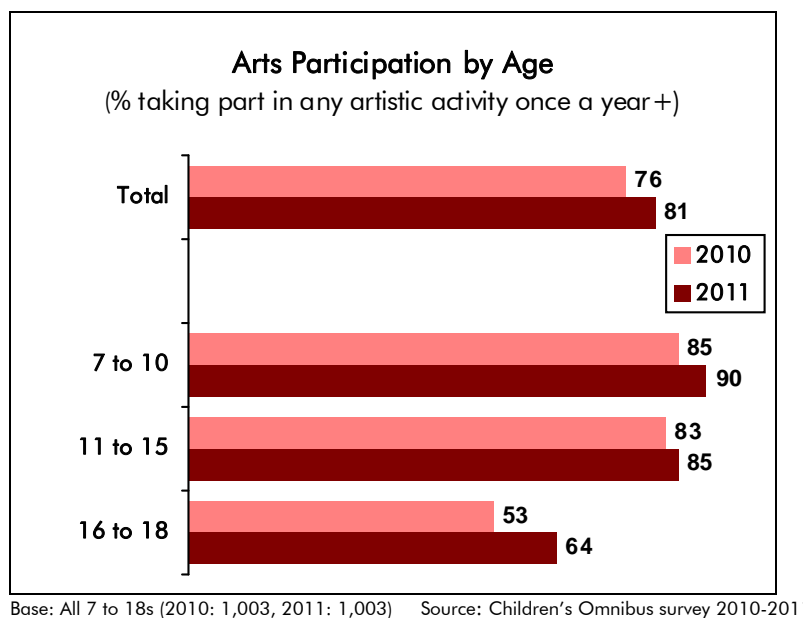
This was closer than the gap found in attendance among the two social grade grouping which stood at 13 percentage points.

4.3.2 By Age

Whilst participation levels do not vary greatly up until the age 15, those in older age group record significantly lower participation levels. In 2011, around two-thirds (64%) of 16 to 18 year olds had participated in at least one of the seven art forms once a year or more often. This compared 90% and 85% respectively among 7 to 10 and 11 to 15 year olds.

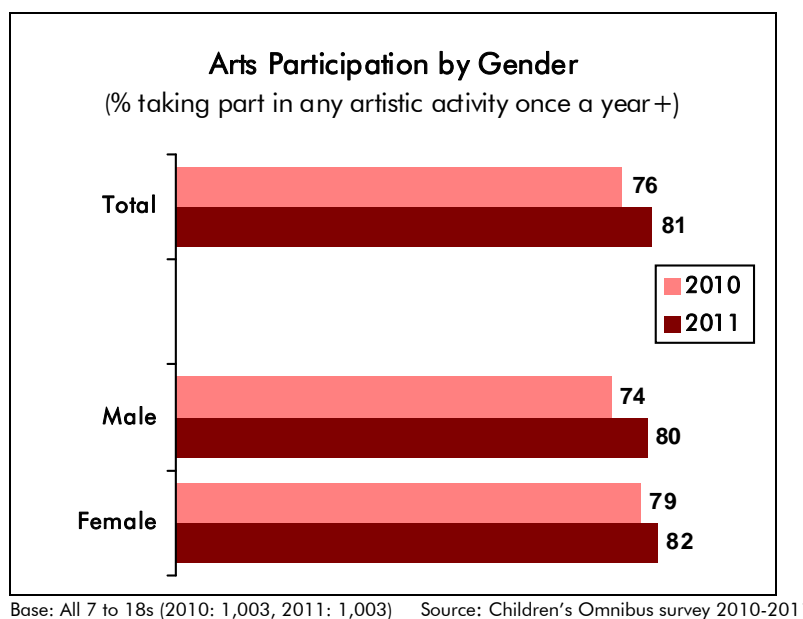
This, in part, perhaps reflects that much of the participation in the arts takes place within a school / college environment and some of the 16 to 18 year old age group will no longer be in this setting.

The gap, however, between the youngest and oldest age group has at least narrowed a little in 2011 with the oldest age group recording the largest increase (+ nine percentage points).



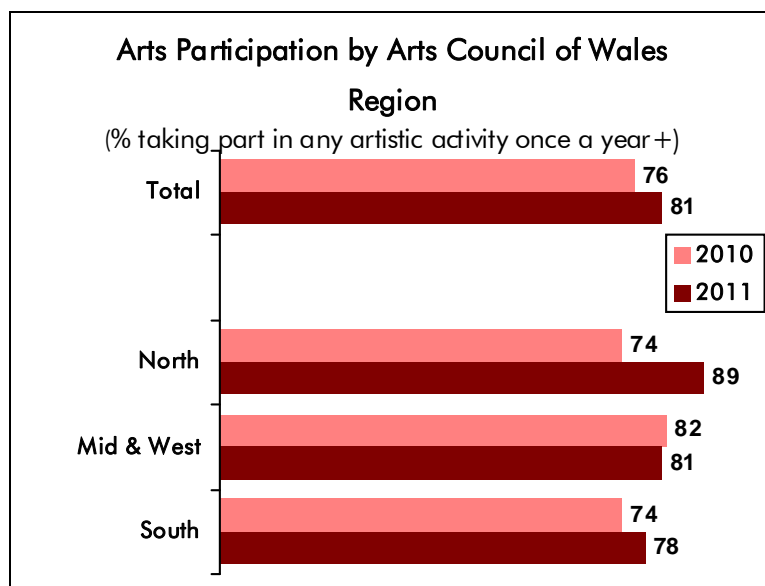
4.3.3 By Gender

In 2011, overall participation rates among boys and girls were very similar (80% and 82% respectively). As with attendance, greater increases were seen among boys relative to 2010 and as such the gender gap had narrowed.



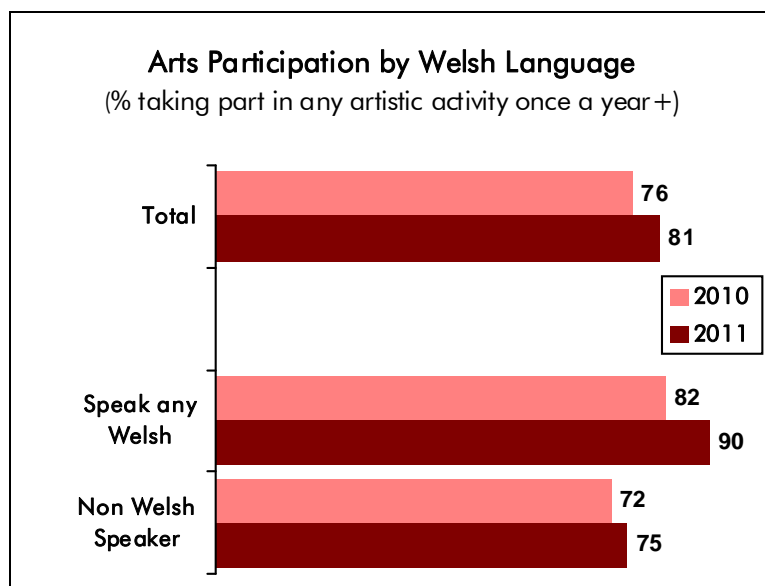
4.3.4 By Region

An increase of 15 percentage points among those living in North Wales meant that yearly participation was now highest in this region (89%). This mirrors increases in attendance recorded in this region in the latest survey. Changes in other regions were less marked but a four percentage point increase in the South and one percentage point decrease in Mid & West Wales meant that participation in these two regions was now more similar (78% and 81% respectively).



Base: All 7 to 18s (2010: 1,003, 2011: 1,003) Source: Children's Omnibus survey 2010-2011

4.3.5 By Welsh Language

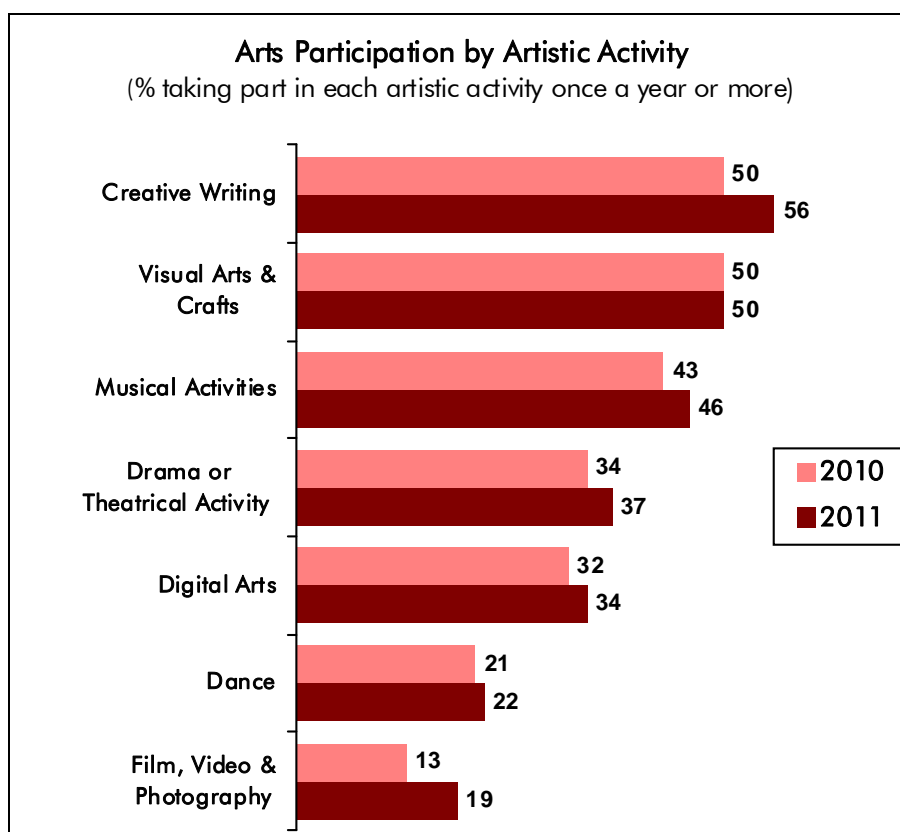


Base: All 7 to 18s (2010: 1,003, 2011: 1,003) Source: Children's Omnibus survey 2010-2011

Both Welsh speakers and non-Welsh speakers have recorded increases in participation levels in the last year. However, growth has been greatest among Welsh speakers widening the gap in participation between the two groups to 15 percentage points.

4.4 Summary of Arts Participation by Artistic Activity

Now turning to the actual arts activities that are being undertaken, the following chart shows the proportion of 7 to 18 year olds who participate in each individual activity once a year or more often. The chart shows the most recent findings, from the 2011 survey and the 2010 findings, for comparison:



Base: All 7 to 18s (2010: 1,003, 2011: 1,003) Source: Children's Omnibus survey 2010-2011

Creative Writing and Visual Arts & Crafts were the most popular participatory art forms among young people with 56% and 50% respectively taking part at least once a year. This was closely followed by Musical activities (46%).

Encouragingly, participation in all art forms remained consistent with or improved upon 2010 figures. This was reflected in the overall participation level (any of the seven activities) which as section 4.2 shows has increased by five percentage points. It would appear that Creative Writing and Film or Video Making or Photography are having the largest influence on this overall increase as both of these art forms have increased by six percentage points since 2010.

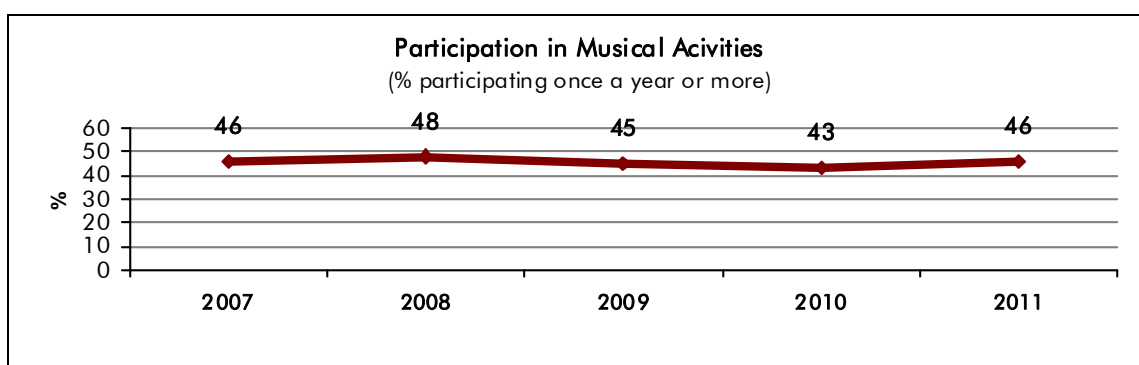
It is also worth noting that whilst the above figures measure at least yearly participation in each art form, participation is a much more frequent activity than just once a year for most of those taking part. For example 34% out of the 46% who take part in Musical activities at least yearly, are actually taking part on at least a weekly basis.

The following sections of the report will now look at each artistic activity in turn, examining the change in participation over time and the demographic and regional variations in participation levels.

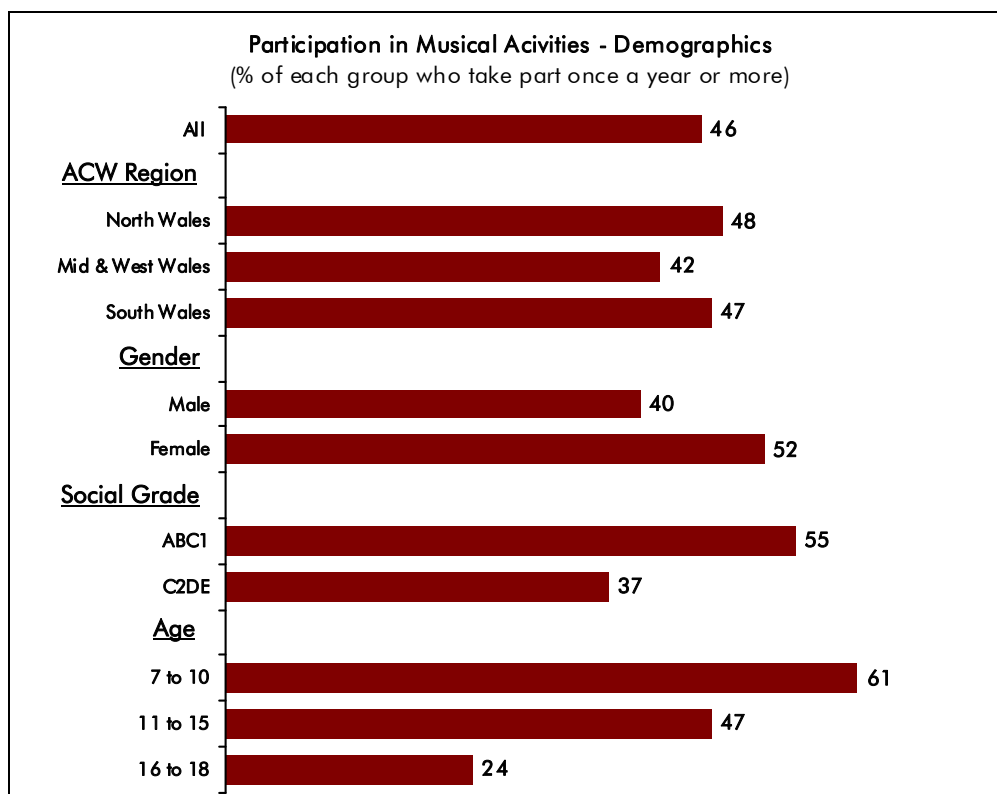
4.5 Musical Activities

Participation in Musical Activities among children and young people has remained relatively consistent across the five years of the survey. The 2011 attendance level of 46% represents a three percentage point increase from 2010 and matches the level recorded by the first survey in 2007.

Participation is much higher than the equivalent adult level which stands at 12% in 2011.

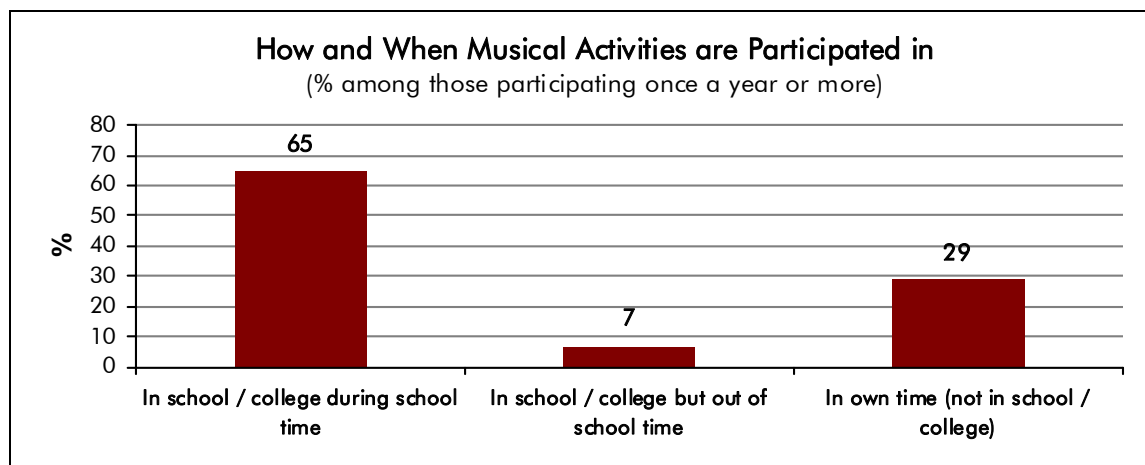


Base: All 7-18 yr olds (at least 1,000 per wave) Source: Children's Omnibus survey 2007 – 2011



Base: All 7 to 18 year olds (1,003) Source: Children's Omnibus survey 2011

- Participation in Musical Activities varies considerably by demographic groups.
- Those in ABC1 households were much more likely to take part in Musical Activities at least once a year (55% vs. 37% C2DEs) as were younger children (61% 7 to 10s vs. 47% 11 to 15s and 24% 16 to 18s). This pattern was also the case in 2010, although if anything the gap between ABC1s and C2DEs has increased slightly (18 percentage points from 14).
- Participation was also higher among girls (52%) than boys (40%) and this represents a widening of gender gap to 12 percentage points from seven percentage points in 2010.
- In contrast, attendance levels by region show less variation in 2011. North Wales remains the regions with the highest attendance level (48%) but this is only slightly in advance on South Wales (47%) and Mid & West Wales (42%). In 2010, the gap between attendance levels in North Wales and other regions was 14 percentage points.



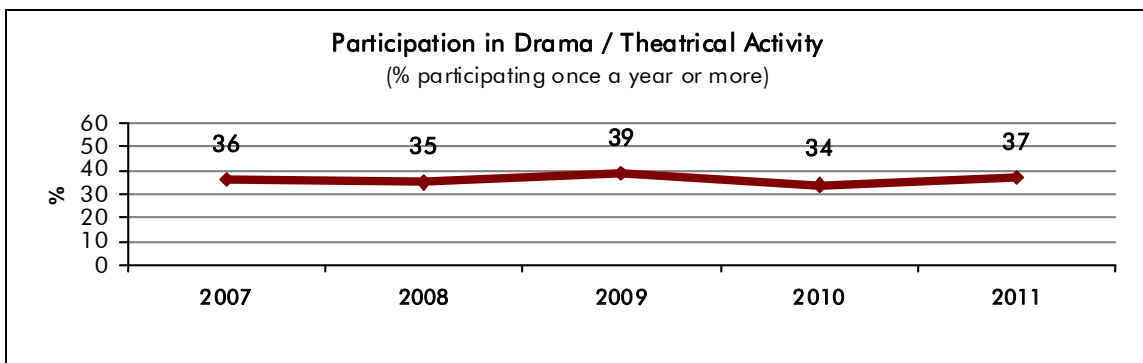
Base: Those participating in Musical Activities once a year or more often Source: Children's Omnibus survey 2011

The majority (72%) of those who participate in this activity do so via school / college, with most these doing so during school time (65%). Around 3 in 10 (29%) of those who participate in Musical activity do so in their own time via activity that is not organised by their school.

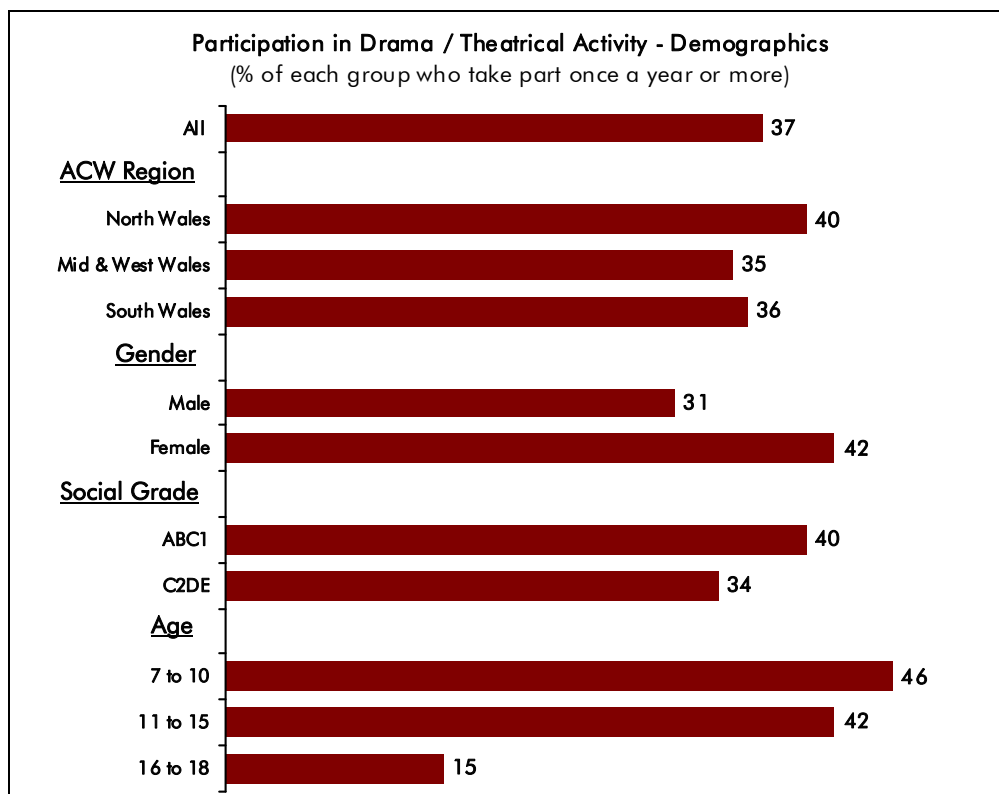
4.6 Drama and Theatrical Activity

Following decline of five percentage points in 2010, participation levels in Drama and Theatrical activity recovered somewhat in 2011 to 37%. This level was fairly typical of that recorded over the past five years.

As with most comparable activities, participation rates among children and young people in Drama and Theatrical activity were considerably in excess of those among adults (5%).

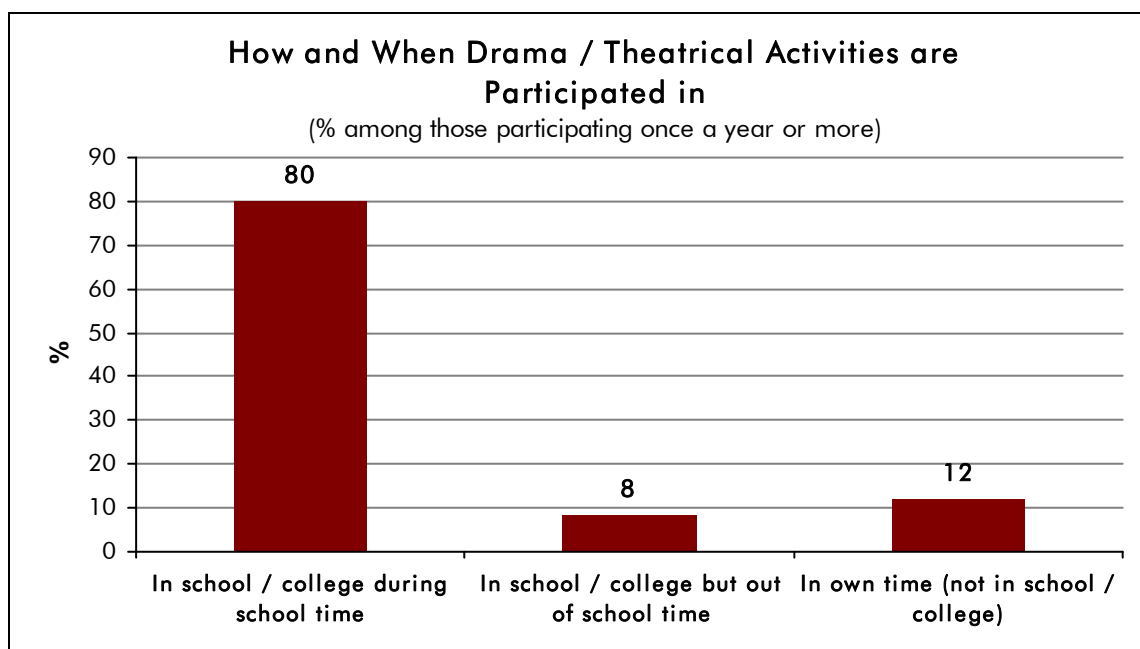


Base: All 7-18 yr olds (at least 1,000 per wave) Source: Children's Omnibus survey 2007 – 2011



Base: All 7 to 18 year olds (1,003) Source: Children's Omnibus survey 2011

- Around two fifths of those aged between 7 to 15 took part in Drama and Theatrical activities. Participation rates among 16 to 18 fall off sharply to 15%.
- Girls were more likely to take part in this activity than boys (42% vs. 31%) and the gender gap on this had widened since 2010 when it stood at seven percentage points.
- Conversely, whilst ABC1s remain more likely to participate (40% vs. 34%) the gap between participation rates among the two groups had narrowed from 15 percentage points in 2010. This was due to rise in participation among C2DEs (8 percentage points).
- In terms of region, results were more similar, although participation in Drama and Theatrical Activity was slightly higher in North Wales (40%) as it was in 2010.



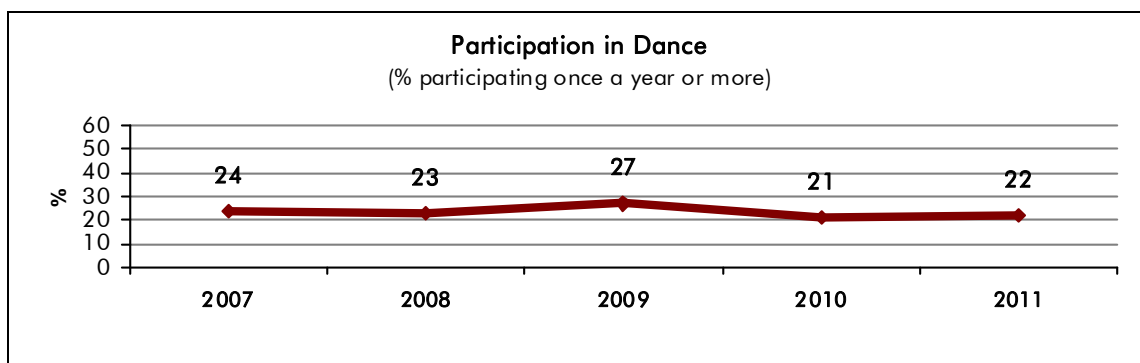
Base: Those participating in Drama / Theatrical Activity once a year or more often Source: Children's Omnibus survey 2011

Most Drama and Theatrical activity appears to be done via school / colleges (88%). Only just over 1 in 10 (12%) of children and young people who participate in this activity do so in their own time independent of school.

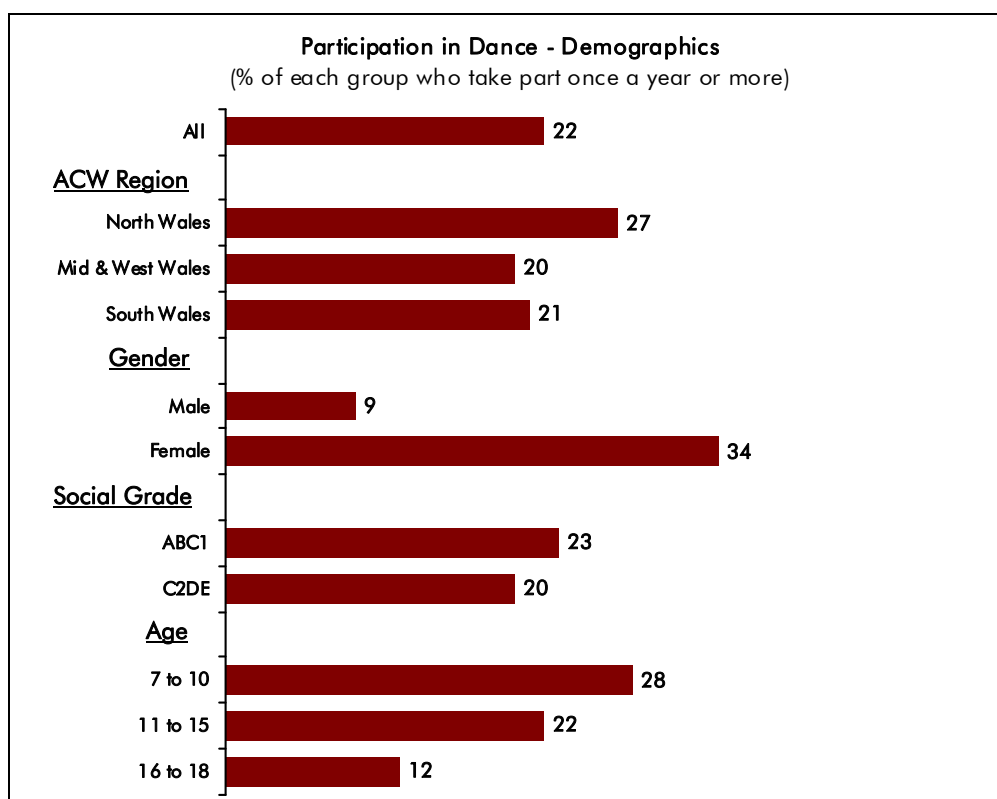
4.7 Dance

Just over a fifth (22%) of children and young people had participated in Dance activities. This was very similar to the level recorded in 2010 and thus avoids further decline from the peak of 27% recorded in 2009.

Yearly participation rates among children are around 3 times that of adults which were recorded at 7% in the latest survey.



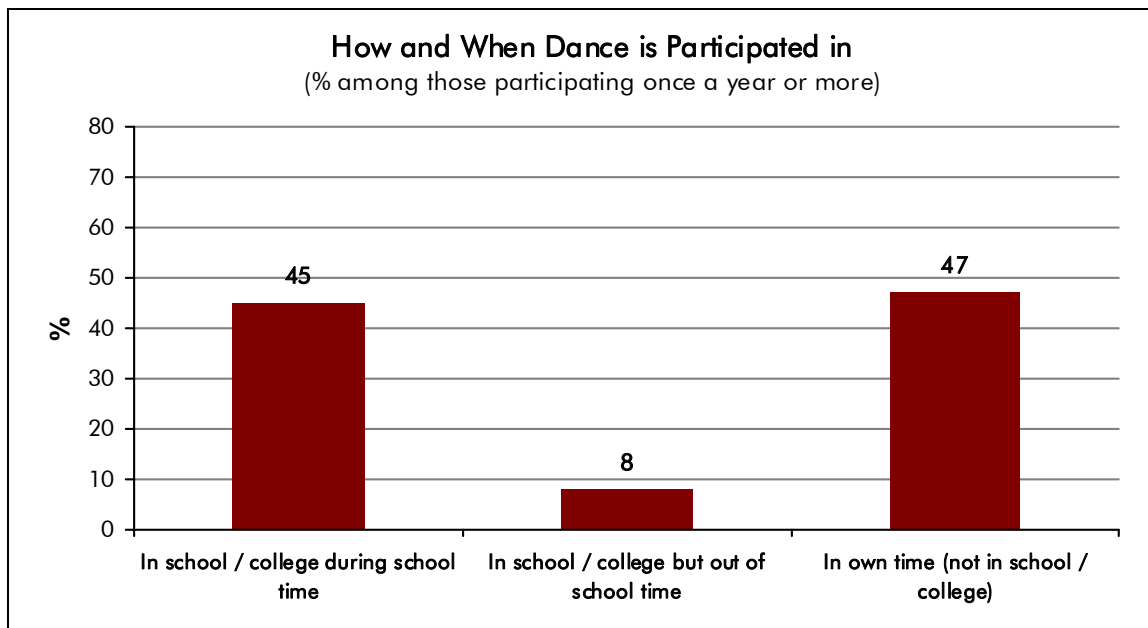
Base: All 7-18 yr olds (at least 1,000 per wave) Source: Children's Omnibus survey 2007 – 2011



Base: All 7 to 18 year olds (1,003) Source: Children's Omnibus survey 2011

- Participation in Dance Activity was much more likely among girls than boys. Just over third (34%) of girls participated once a year or more often and this was almost four times the level recorded for boys (9%).

- Participation in Dance was also correlated with age with those aged 7 to 10 (28%) being more than twice as likely to take part as 16 to 18 year olds (12%), with 11 to 15s in between these two levels at 22%. The pattern mirrors 2010 findings.
- Whilst ABC1s were slightly more likely to be Dance participants (23% vs. 20% C2DE), this gap has narrowed since 2010 when equivalent levels were 25% and 17% respectively.
- Those living in North Wales (27%) remain slightly more likely to participate in this activity than those based in Mid & West and South Wales (20% and 21% respectively).

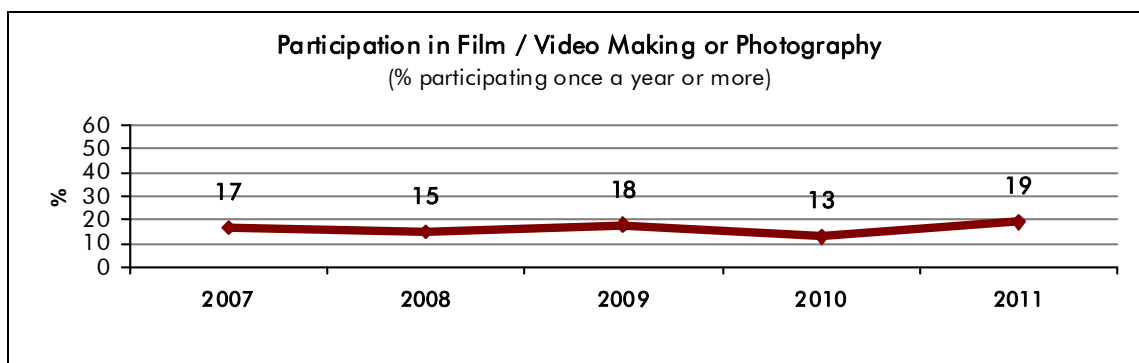


Base: Those participating in Dance once a year or more often Source: Children's Omnibus survey 2011

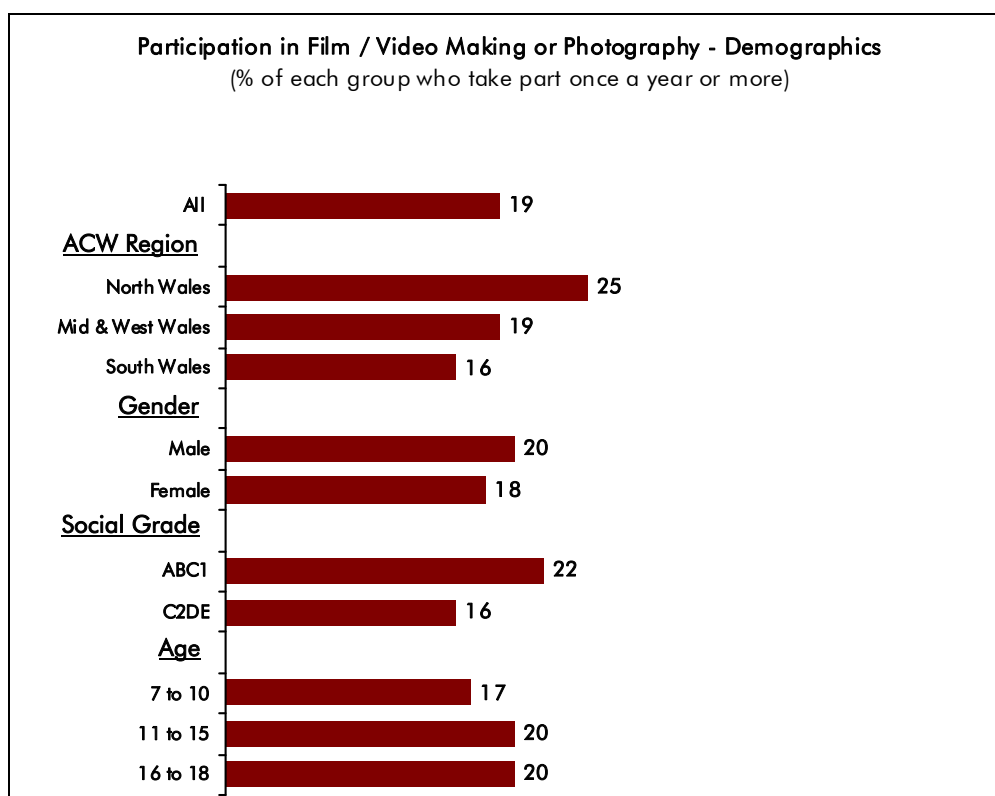
Those who participate in Dance activity are almost evenly split between those who take part via school / college (53%) and those who do so outside of the school environment in their own time (47%).

4.8 Film or Video Making or Photography

At least yearly participation in Film or Video Making or Photography among children and young people stood at 19% in 2011. This represented an increase of six percentage points from 2010 and reversed the decline seen from the previous year. The current level is the highest that has been recorded across the five years of the survey.



Base: All 7-18 yr olds (at least 1,000 per wave) Source: Children's Omnibus survey 2007 – 2011

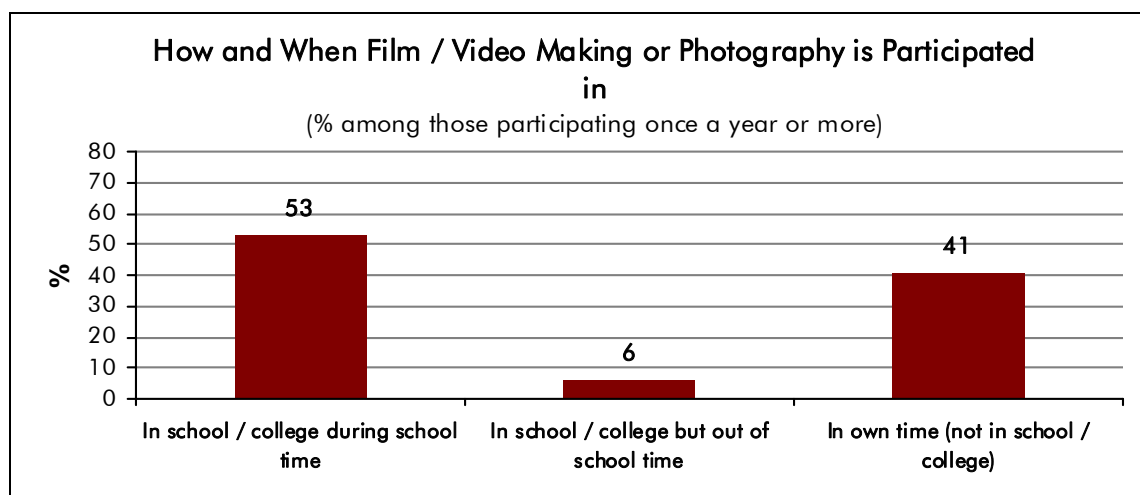


Base: All 7 to 18 year olds (1,003) Source: Children's Omnibus survey 2011

- There was little difference between gender and different age groups in terms of their participation in Film and Video Making or Photography. However, all age

groups and both boys and girls have seen increases in participation rates since 2010 (of between 4 and 9 percentage points).

- Those in higher social grades, ABC1 were more likely to participate in this activity than C2DEs (22% vs. 16%) although both groups have increased since 2010 meaning that the gap between them has remained constant.
- Those living in North Wales have the highest levels of participation in Film and Video Making or Photography (25%). This region also records the greatest change since 2010 (+ nine percentage points) meaning the difference in participation between the North and others regions has widened.



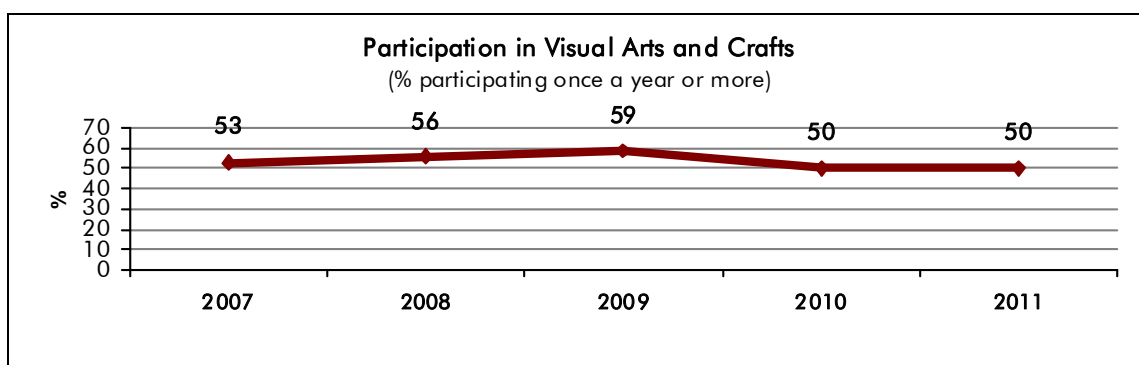
Base: Those participating in Film / Video Making or Photography once a year or more often
Source: Children's Omnibus survey 2011

As with Dance, participation in Film or Video Making or Photography is split in terms of its setting. Around 6 in 10 take part via school (most of these during school hours) whereas around 4 in 10 participate outside of the school environment in their own time.

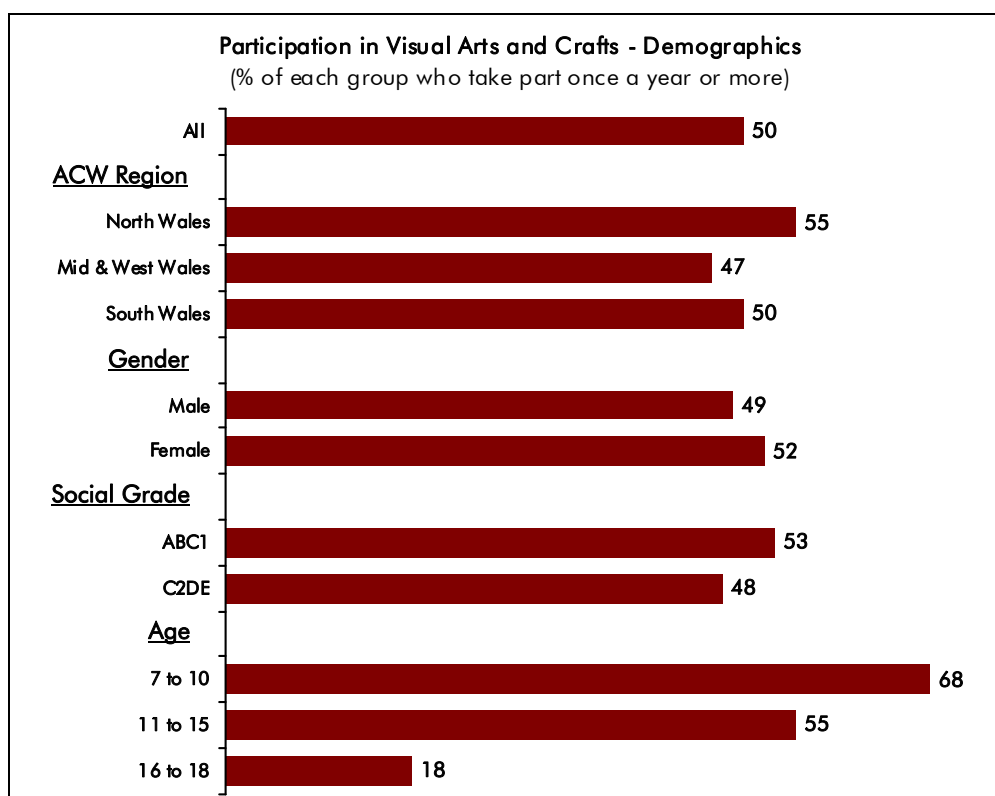
4.9 Visual Arts and Crafts

Half (50%) of all children and young people take part in Visual Arts and Craft activities.

This was the same level as that recorded in 2010 and represents a degree of stabilisation following the considerable decline in participation from 2009 to 2010. Whilst participation among adults is at much lower levels (15%), a similar trend is recorded - i.e. stabilisation in 2011, following considerable decline between 2009 and 2010 (21% to 14%).

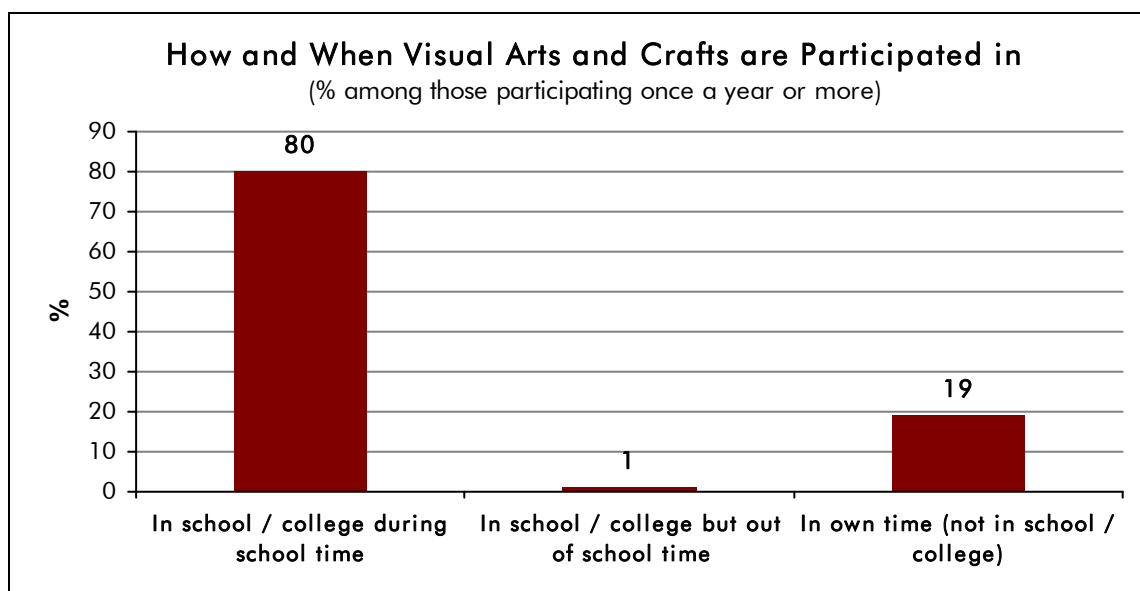


Base: All 7-18 yr olds (at least 1,000 per wave) Source: Children's Omnibus survey 2007 – 2011



Base: All 7 to 18 year olds (1,003) Source: Children's Omnibus survey 2011

- The greatest differentiation in participation in Visual Arts and Crafts is found by age. Nearly 7 in 10 of 7 to 10 year olds participate on at least a yearly basis, as do over half of 11 to 15s (55%). However, yearly participation among 16 to 18s falls to 18%. This matches the pattern of findings in 2010.
- There was less difference in participation rates by gender and social grade. The gap between both boys and girls and ABC1s and C2DEs has narrowed in the last year to create this situation (13 to 3 percentage points and 9 to 5 percentage points respectively).
- As in 2010, there was relatively little difference in participation in Visual Arts and Crafts by region, although North Wales has increased by five percentage points to be slightly in advance of the other two regions.



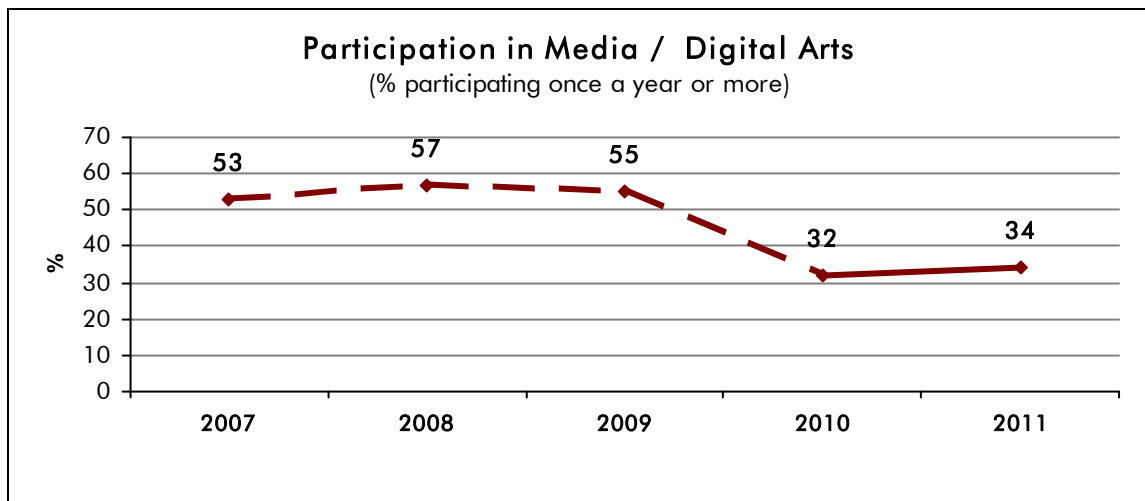
Base: Those participating in Visual Arts and Crafts once a year or more often Source: Children’s Omnibus survey 2011

Participation in Visual Arts and Crafts was mostly found within the school environment within school time (80%). A minority (19%) take part in this activity outside of the school environment in their own time.

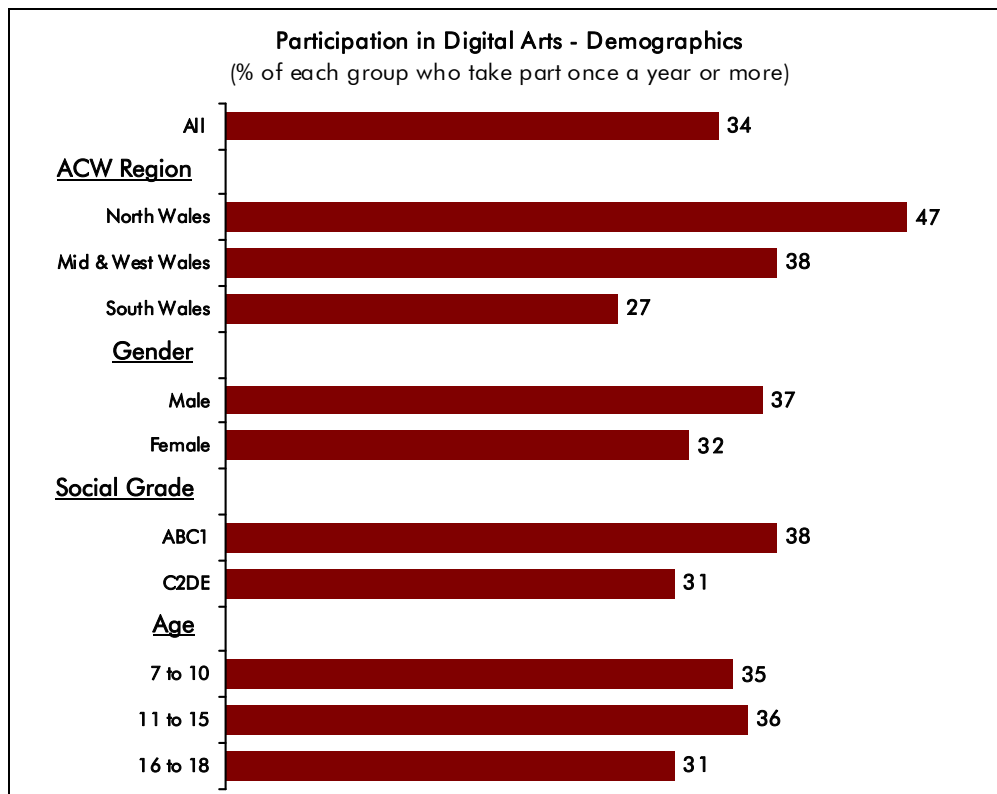
4.10 Digital Arts

Participation in Digital Arts, defined as creating and making arts using digital technology – e.g. uploading, creating or re-mixing arts related content on, for example, Youtube, Flickr, etc.) has been measured since 2010. Prior to this, this category was defined as Media Arts and was defined more broadly as website design or working with your PC. Consequently, the narrowing of this definition has resulted in a lower reported participation rate of digital arts (around one third) compared with media arts (above half).

The latest finding in 2011 which shows a participation rate of 34% in Digital arts, is a small increase from 2010 (32%).

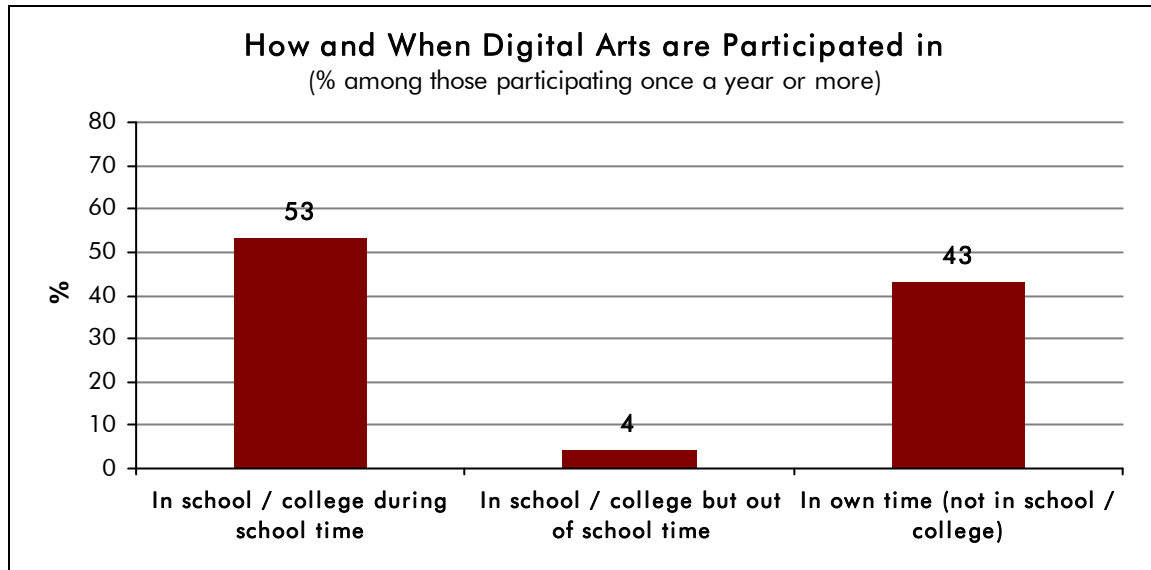


Base: All 7-18 yr olds (at least 1,000 per wave) Source: Children's Omnibus survey 2007 - 2011



Base: All 7 to 18 year olds (1,003) Source: Children's Omnibus survey 2011

- Boys were slightly more likely to take part in Digital Arts than girls - 37% compared with 32%. This gap was slightly higher than that found in 2010 when corresponding participation levels were 33% and 31% respectively.
- There remains a seven percentage point gap between participation levels of ABC1s (38%) and C2DEs (31%) – both groups have increased participation levels by three percentage points since 2010.
- The biggest variation in participation in Digital Arts was found by region. Participation in North Wales has seen the strongest growth since 2010 (+11 percentage points) and now stands at 47%, considerably higher than Mid & West Wales (38%) and South Wales (27%).



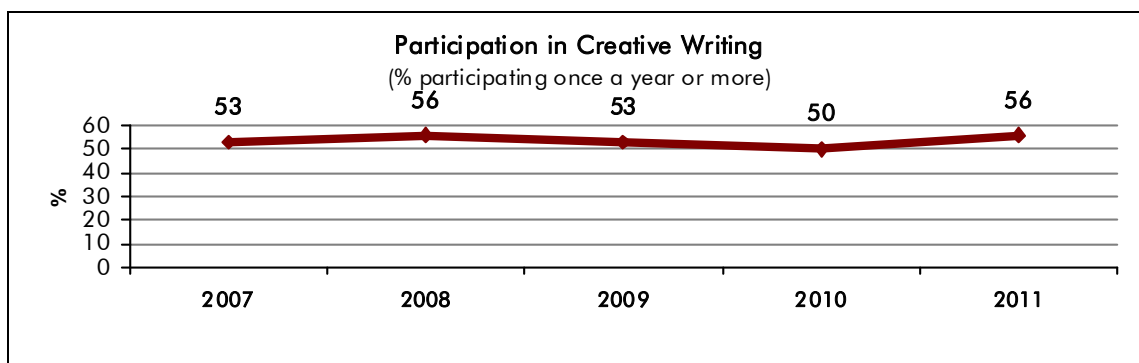
Base: Those participating in Digital Arts once a year or more often Source: Children's Omnibus survey 2011

Again, there is a split as to when and how participation takes place – 57% participate in Digital Arts via school / college (mostly in school / college time), whereas 43% of participants do so independently of school in their own time.

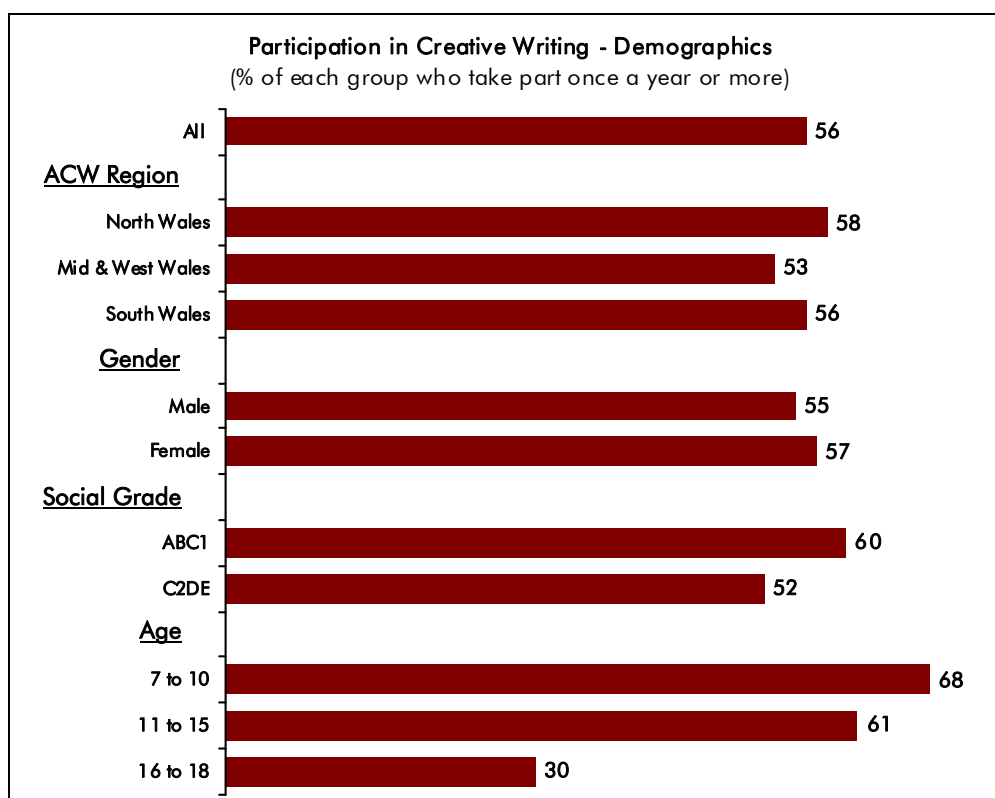
4.11 Creative writing

At least yearly participation in Creative Writing among children and young people has consistently reached 50% or more across the five years of the survey. The most recent period found a level of 56%, reversing the decline reported over the two previous years.

Among adults, the corresponding participation level is 9%.



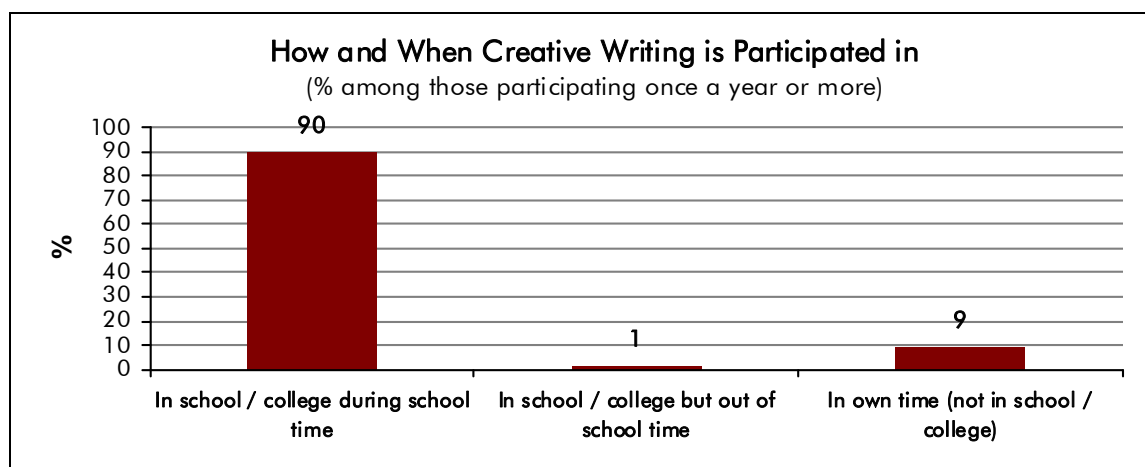
Base: All 7-18 yr olds (at least 1,000 per wave) Source: Children's Omnibus survey 2007 - 2011



Base: All 7 to 18 year olds (1,003) Source: Children's Omnibus survey 2011

- Creative writing, like many other art forms has lower participation rates among the 16 to 18 year old age group (30%) than it does for those who are within compulsory school age (61% 11 to 15s, 68% 7 to 10s)

- Whilst ABC1s (60%) were more likely to participate than C2DEs (52%) this gap has narrowed relative to 2010 when it stood at 14 percentage points.
- Similarly, in 2011 girls were only slightly more likely than boys to take part in Creative Writing (57% vs. 55%) whereas in 2010 the gender gap was eight percentage points.
- In terms of region, there was relatively little difference in participation, although North and South Wales have increased since 2010 (6 percentage point and 9 percentage points respectively) meaning levels here were slightly in advance of Mid & West Wales.



Base: Those participating in Creative Writing once a year or more often Source: Children's Omnibus survey 2011

The vast majority of creative writing takes place within schools /colleges during school time (90%).

Appendix 1 – Socio-Economic 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 | } | ABC1s – professional, qualified and non-manual occupations |
| 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 | } | C2DEs – skilled, semi-skilled and unskilled manual workers and non-working people |
| 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 | | |

Appendix 2 – 2011 Survey Questionnaire

Arts Council of Wales

Final Questions – October 2011 Children's Omnibus

SHOW CARD

Q1 How often do you go to each of the activities that I read out?

So firstly, how often do you

Go to Plays

-Several times a week
-Once a week
-2 or 3 times a month
-Once a month
-Once every 2 to 3 months
-2 or 3 times a year
-Once a year
-Less often
-Never

REPEAT FOR:

- Go to Musicals
- Go to Opera
- Go to Classical Music concerts
- Go to Other Live music
- Go to Dance performances
- Go to Art or Craft galleries or exhibitions
- Go to Readings, Storytellings or other Literature events
- Go to Carnivals and Street arts

SHOW CARD

Q2 When you last went to a play (ask for each activity attended at least once a year in Q1) was it:

- organised by school/college during school time
- organised by school/college but out of school time
- in your own time (not organised by school / college)

REPEAT FOR ALL ACTIVITIES ATTENDED ONCE A YEAR OR MORE OFTEN

SHOW CARD

Q3 And how often do you take part in each of the activities that I read out?

So firstly, how often do you

Take part in musical activities (such as singing or playing an instrument)

-Several times a week
-Once a week
-2 or 3 times a month
-Once a month
-Once every 2 to 3 months
-2 or 3 times a year
-Once a year
-Less often
-Never

REPEAT FOR:

Take part in drama or theatrical activity (e.g. acting, directing, technical work)

Take part in dance activity (not disco/clubbing)

Take part in film and video making or photography

Take part in visual arts or crafts (e.g. painting, textiles)

Take part in digital arts (creating and making arts using digital technology e.g. uploading, creating or remixing arts related content on, for example, YouTube, Flickr, etc.)

Take part in creative writing (e.g. poetry or stories)

SHOW CARD

Q4 When you last took part in musical activity (ask for each activity taken part in at least once a year in Q3) was it:

in school/college during school time

in school/college but out of school time

in your own time (not in school / college)

REPEAT FOR ALL ACTIVITIES TAKEN PART IN ONCE A YEAR OR MORE OFTEN