



Bash Street Theatre, Night Out performance, New Tredegar
(photo: Hazel Hannant)

2009 Omnibus Survey Report on Main Findings

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Arts Council of Wales

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1. Introduction

1.1 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 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 conducted in November 2009 examining demographic and regional variations in attendance and participation and charting the overall trends in the data over time.

1.2 Methodology

The fieldwork took place between 20 - 29 November 2009 and in total 1,000 interviews were conducted. The interviews were conducted in respondents' own homes using CAPI (Computer Aided Personal Interviewing) technology in a cross section of homes sampled by electoral ward. The sample was designed to be representative of the adult population resident in Wales aged 16 and over and within each sampling point, interlocking quota controls were used for the selection of respondents. The quotas were set to reflect the demographic profile of Welsh residents and no more than one person per household was interviewed. The resulting data was also weighted to correct any imbalances in the sample, to ensure that it was representative of the Welsh population.

1.3 Notes on Data Presentation

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

- Over three-quarters (77%) of Welsh adults attend at least one arts event, once a year or more often¹. This is a small decrease since last year (down by two percentage points) and appears to be driven by an equivalent decrease in cinema attendance – down to 50%.
- Nevertheless, the rolling three year average data, which looks at the 11 art forms that have been consistently asked about over the last ten years, shows that art attendance is still generally increasing over the long term - 74% of adults are now attending compared with around 68% ten years ago². Furthermore, excluding cinema attendance from overall arts attendance shows that 71% of adults go to a non-cinema based arts event once a year or more often which is an increase of two percentage points since last year and therefore shows that although overall attendance to the arts is slightly down year-on-year, there has actually been an increase in attendance to the non-cinema based events.
- The regional picture in overall arts attendance is similar to last year, with adults in Mid & West Wales regions (83%) and the North (82%) more likely than those in the South (72%) to attend arts events. A six percentage point decrease in the South however, has further widened the gap between the regions.
- Overall arts attendance continues to correlate with social grade with those in social grades ABC1³ (professional, qualified and non-manual occupations) being more likely to attend the arts than those in the lower C2DE grouping (skilled, semi-skilled and unskilled manual workers and non working people): 87% of ABC1s attend the arts compared with 70% of C2DEs. ABs have increased attendance by five percentage points since last year to 90%, whilst there has been little change amongst C1s or C2s but DEs have lost the five percentage points they gained last year, to return to 66%.
- Arts attendance also generally correlates with age, with younger adults typically being more likely than older adults to attend an arts event; 16-24s are the most likely to attend and have increased by one percentage point since last year to take them to 93%. The high proportion of young people attending the arts is driven by their much higher than average likelihood of going to the cinema (84% go to the cinema compared with 50% of all adults). When cinema attendance is excluded from the analysis, 16-24s become only slightly more likely than average to attend the arts (75% vs. 71% of all adults

¹ Based on the 14 art forms asked about since 2006

² Based on the 11 comparable art forms asked about since 1998

³ A full description of socio-economic groupings is included in the Appendix

who attend a non-cinema based art event), and people aged 35-44 years become the most likely to attend, at 84%.

- Overall arts attendance amongst 25-34s is down seven percentage points to 80% in 2009, whilst 35-44s have seen the biggest increase, up six percentage points to 91% making them the second most likely age group to attend the arts. Some of the changes by individual artform which have contributed to this include considerable increases in attendance by 35-44s to musicals (up 17 percentage points to 35%), art galleries (up nine percentage points to 45%), the cinema (up eight percentage points to 71%) and carnivals (up seven percentage points to 50%) and decreases in attendance by 25-34s to plays (down eight percentage points to 25%), carnivals (down eight percentage points to 38%) and musicals (down six percentage points to 17%).
- The difference by gender in arts attendance reported last year has not continued into 2009; a small increase in attendance amongst men and a small decrease amongst women means there is again very little difference in propensity to attend by gender - 76% of men and 78% of women in 2009 reported attending an arts event once a year or more.
- A small increase in attendance amongst Welsh Language speakers, and a small decrease amongst non speakers, means there is once again a gap between the two groups with Welsh speakers more likely to attend the arts (82% - up four percentage points) than non-Welsh speakers (76% - down three percentage points). This finding is also closely correlated with the regional variations in attendance with more adults in the North attending, where there are more Welsh speakers, and fewer adults in the South attending, where there are less Welsh speakers.
- Film remains the most popular art form attended with 50% going to see a film at least once a year which represents a small (two percentage points) decrease since last year. Most of the other art forms have seen increases in attendance, most notably:
 - Other live music, the second most attended art form, is up three percentage points year-on-year to 43%
 - The same proportion of adults as last year (35%) are attending carnivals and street arts
 - There has been a four percentage point increase in the proportion attending art galleries and exhibitions (34%), this has now overtaken Plays (28%).

- Encouragingly, all other art forms have increased slightly since last year, including jazz, which is up three percentage points to 10%, folk, traditional and world music and classical music – both up two percentage points to 13%, and literary events – up two percentage points to 9%.

2.2 Arts Participation

- 35% of Welsh adults participate in artistic activities⁴ once a year or more, a four percentage point increase since last year, when 31% said they took part (this analysis is based on the six artistic activities asked about over time).
- In 2009 an additional artistic activity (digital arts) was added to the survey and when this is included in the analysis, overall participation levels rise to 37%. For the purposes of comparable analysis, the regional and demographic trends are based only on the six artistic activities asked about pre-2009.
- All regions have increased their participation levels by a similar proportion and therefore regional participation is similar to last year. People living in the North are most likely to take part, at 44% (up three percentage points since 2008). A five percentage point increase in the Mid & West Wales region takes it to 36% whilst a three percentage point increase in the South brings it up to 30%.
- Participation in the arts is higher amongst the higher ABC1s⁵ social group (professional, qualified and non-manual occupations) at 43%, than C2DEs at 28% (skilled, semi-skilled and unskilled manual workers and non working people). All social grades have increased arts participation levels apart from the DE group who have dropped five percentage points, to 25%; ABs are up three percentage points to 49%; C1s are up seven percentage points to 40% and the biggest increase has come amongst the C2 group – up 11 percentage points to 33%.
- Overall, there is little real difference by age in propensity to take part in arts activities. The main changes since last year are that 25-34s have lost the increase in participation levels they had previously gained and are now somewhat less likely than average to take part (down seven percentage points to 28%) whereas 45-64s are now the most likely age group to take part (up six percentage points to 39%), closely followed by the 16-24s (up eight percentage points to 37%).
- Women (37%) are more likely than men (32%) to take part in artistic activities however there has been an increase amongst men (up seven percentage points since last year), therefore narrowing the gap between the sexes. Males are twice as likely as females to take part in film, video and photography (10% vs. 5%) and are also more likely to participate in music – at 19% they have increased by six percentage points year on year, compared to women who at 13% are largely unchanged year-on-year.

⁴ Refers to the six comparable artistic activities asked about over time

⁵ A full description of socio-economic groupings is included in the Appendix

- Welsh speakers continue to be more likely than non-Welsh speakers to take part (45% compared with 31%); with a three percentage point increase in participation amongst both groups the gap between them remains the same as last year.
- There have been small increases in participation in all of the activities asked about, most notably visual arts & crafts which are up four percentage points year-on-year, to 21%. The second most popular activity is music at 15% (up two percentage points year on year) followed by the new category of digital arts, at 12%.

3. Arts Attendance

3.1 Frequency of Attending Arts Events - Methodology

Respondents were asked to describe their attendance to art events by indicating how often they attend each of the following 14 artforms:

- a. **Cinema**
- b. **Musical** (not opera)
- c. **Opera**
- d. **Ballet**
- e. **Contemporary dance**
- f. **Plays**
- g. **Classical music** (concerts/recital)
- h. **Jazz** (concert/performance)
- i. **Folk, Traditional or World Music***
- j. **Other live music**
- k. **Art or craft galleries or exhibitions**
- l. **Readings, Storytellings and other Literary Events**
- m. **Carnivals and street arts***
- n. **Arts Festivals** (e.g. Music, Dance, Drama, Literature*)

* denotes artforms added in 2006.

This section of the report will summarise overall attendance of 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 person is most likely to attend the arts. The report will then go on to look at attendance to each artform individually.

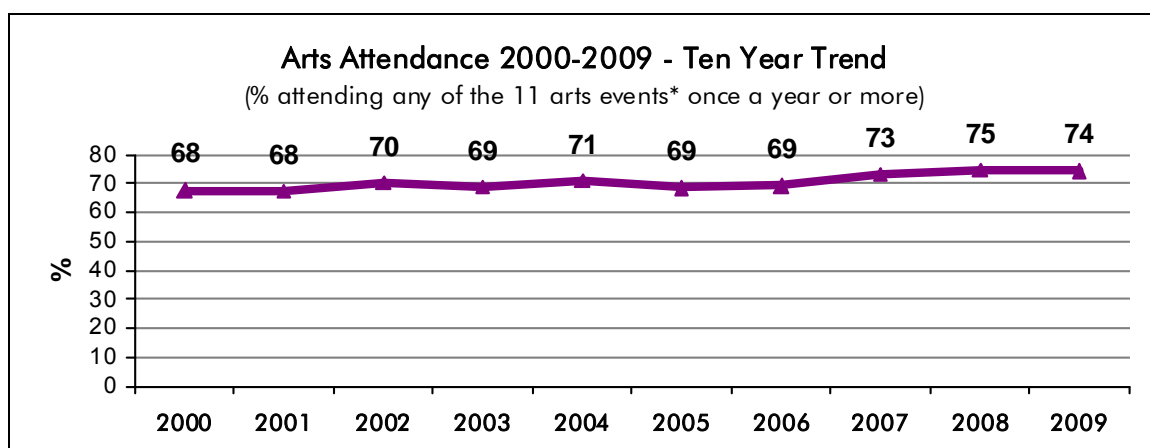
When considering the overall attendance figures, it should be noted that the list of artforms asked about in the survey changed in 2006 to include three additional artforms (Folk, Traditional or World Music, Carnivals and Street Arts and Arts Festivals). Therefore, whilst the year-on-year data comparisons will look at attendance to any of these 14 artforms, to understand comparisons over time, the ten year trend data will look only at the 11 artforms that have remained consistent over the longer period of time.

3.2 Frequency of Attending Arts Events - Key Findings

The most recent Arts Council of Wales Omnibus survey for 2009 reveals that 77% of adults in Wales attend at least one of the 14 arts events once a year or more often. This is a small decrease since last year, when 79% of adults said they attended an artform once a year or more. When Cinema is excluded from the analysis the results show that 71% of adults attend a non-Cinema-based arts event, which compares

favourably with 2008, when 69% did so. This suggests that the small yearly decrease in overall arts attendance has occurred due to a decrease in cinema attendance and indeed, there has been a two percentage point drop in yearly attendance to the cinema (from 52% in 2008 to 50% in 2009).

Looking at the ten year trend, which compares attendance over time to the 11 comparable artforms asked about, we can see that the slight upward trend noted last year has levelled off, at 74%. This does however still represent a continued increase in attendance over the last ten years as in 2000, 68% of adults attended the arts which is six percentage points less than today:

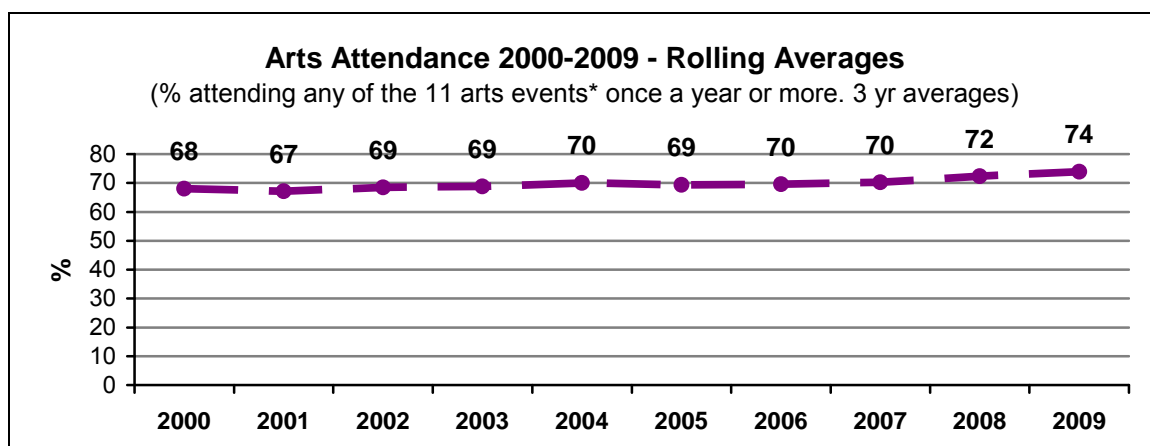


Base: All Adults (1,000)

Source: Wales Omnibus survey 2000-2009

* Data includes the comparable 11 artforms asked about between 2000 and 2009 and excludes the 3 artforms added for the 2006 - 2009 surveys

It can also be useful to look at three year rolling data averages in attendance figures to help understand if there are any meaningful trends taking place in the data. Again, the ten year rolling data only includes the 11 comparable art forms asked about:



Base: All Adults (1,000)

Source: Wales Omnibus survey 1998-2007

* Data includes the comparable 11 artforms asked about between 2000 and 2009 and excludes the 3 artforms added for the 2006 - 2009 surveys

This picture confirms that there has been a real increase in attendance over time from a three year average of 68% ten years ago to a three year average of 74% in 2009.

As well as examining yearly attendance to the arts we also look at the proportion attending the arts two to three times a year or more often. This helps us to further understand attendance figures. In 2009, 65% of adults said they attended at least one of the 14 art forms two to three times a year or more often which is the same proportion as last year. Over half (54%) said they attended a non-Cinema based art event, which is an increase of three percentage points year-on-year. This shows that almost two-thirds of all adults are attending the arts at least two to three times a year and over half of all adults are attending a non-Cinema based art event.

The following table details these figures in comparison to 2008 and will also be monitored over time:

Frequency of Attending the Arts 2008-2009

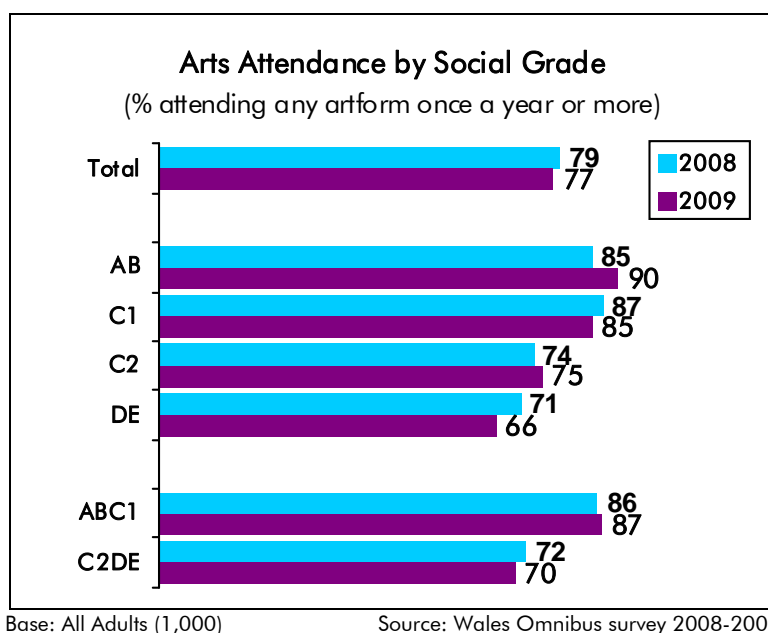
	All 14 Artforms %		All excl. cinema %	
	2008	2009	2008	2009
Once a year or more	79	77	69	71
2 – 3 times a year or more	65	65	51	54

Base: All Adults (2008: 1,012 / 2009: 1,000)

3.3 Attendance to Arts Events by Demographic Grouping

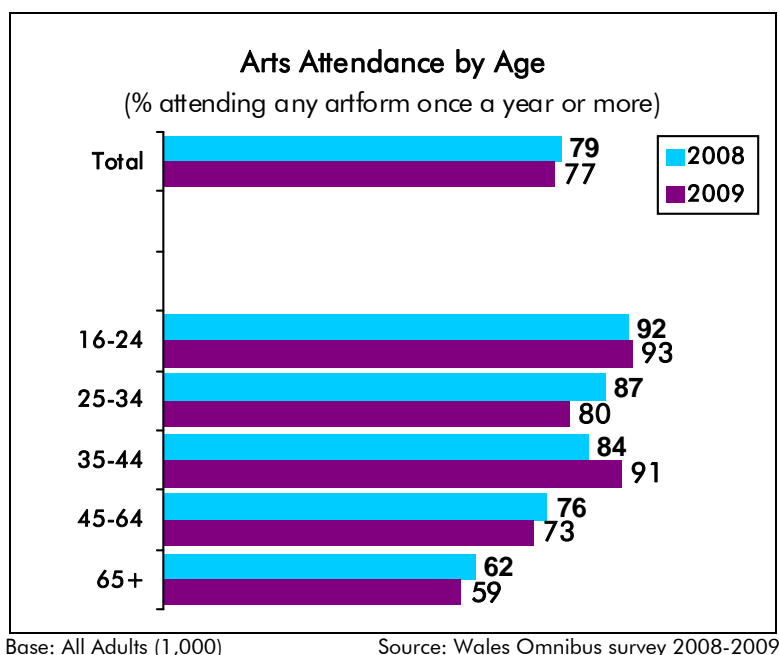
This section of the report looks at the differences in overall arts attendance by demographic group and region, and charts the proportion of adults in each key group that attend an arts event once a year or more often. The data is presented for 2009 and 2008 and each chart also shows the overall total attendance figures to any of the 14 artforms asked about for comparison:

3.3.1 By Social Grade

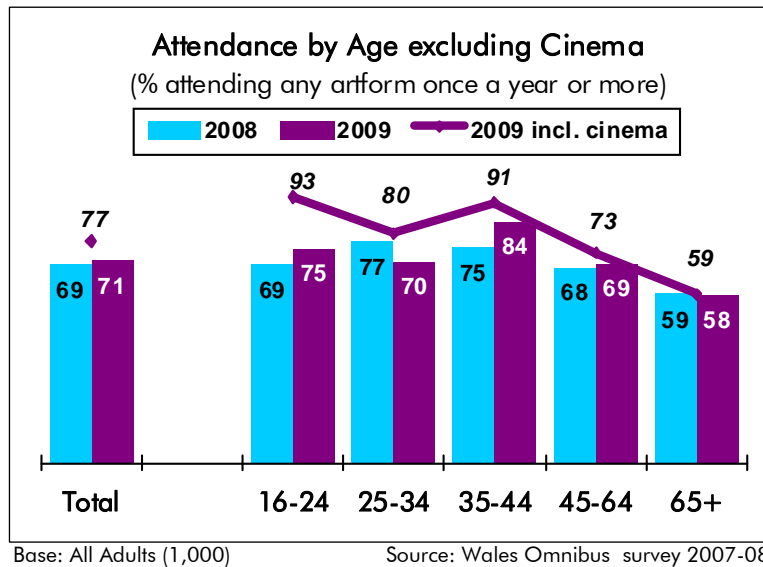


- Arts attendance continues to correlate closely with social grade, with those in social grades ABC1 (professional, qualified and non manual work) more likely to attend the arts than those in C2DE (skilled, semi-skilled and unskilled manual workers and non working people). At 87% and 70%, both social grade groups are very similar to last year overall.
- There was however some variation seen within the individual social grades, with the biggest changes at the very top and bottom of the spectrum. ABs were up five percentage points to 90%, and DEs have decreased (down five percentage points to 66%). Attendance amongst C1s and C2s was very similar to last year. ABs are therefore the most likely group to attend the arts at 90%, followed by C1s (85%), C2s (75%) and then DEs (66%).

3.3.2 By Age



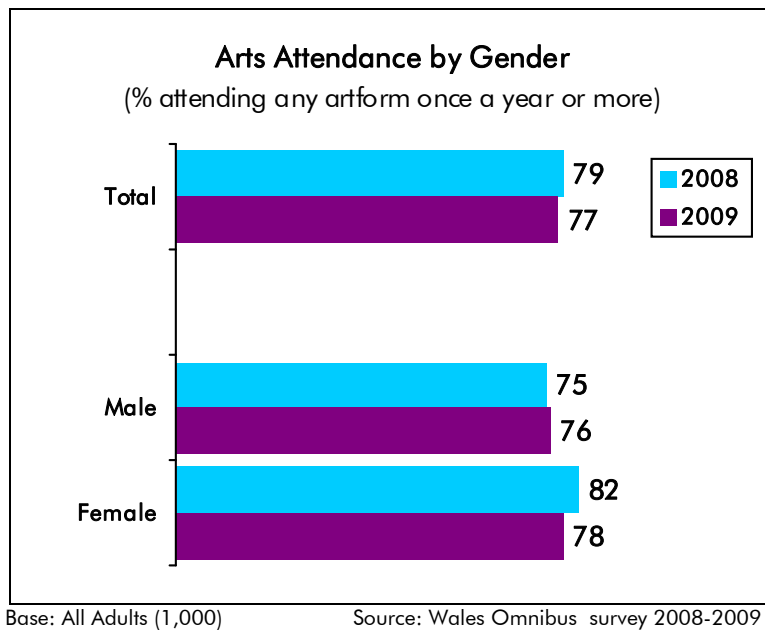
- Arts attendance is also closely linked to age, with younger adults being more likely than older adults to attend; just over nine-in-ten 16-24 year olds attend an arts event.
- Some changes in overall attendance by age since last year mean that 35-44s are now the second most likely age range to attend the arts at 91% (up seven percentage points since last year), followed by 25-34s, at 80% (down seven percentage points since last year). The changes in attendance to individual art forms which have contributed to this are covered in detail in the individual art form sections of this report, however in brief, they include:
 - Considerable increases in attendance by 35-44s to musicals, art galleries, cinema and carnivals
 - Decreases in attendance by 25-34s to plays, carnivals and musicals.
- Older adults aged 65 and over remain the least likely to attend, (attendance is at 59%) with a small decrease since last year's 62%. 45-64 year olds have also decreased slightly, now at 73%, compared with 76% last year.
- As mentioned earlier, all art forms are included in this analysis, however as younger adults are typically more likely to go to the Cinema than older adults, it is also useful to look at the data excluding Cinema from the analysis to see how that effects the overall picture by age. The columns on the chart overleaf shows the proportion attending any art form *excluding* Cinema in 2009 and 2008 and the line shows the proportion attending any art form *including* Cinema:



- Overall attendance to any arts event is much lower when Cinema is excluded, at 71%, compared with 77% including cinema. Furthermore, 16-24s' propensity to attend an arts event drops 18 percentage points down to 75% when Cinema is excluded, whereas 35-44s only drop seven percentage points (to 84%), and make this age group the most likely to attend a non-Cinema based art event.
- Attendance levels for adults aged over 65 are the lowest when excluding Cinema (58%). However, this is virtually identical to the proportion attending arts events including Cinema (59%).

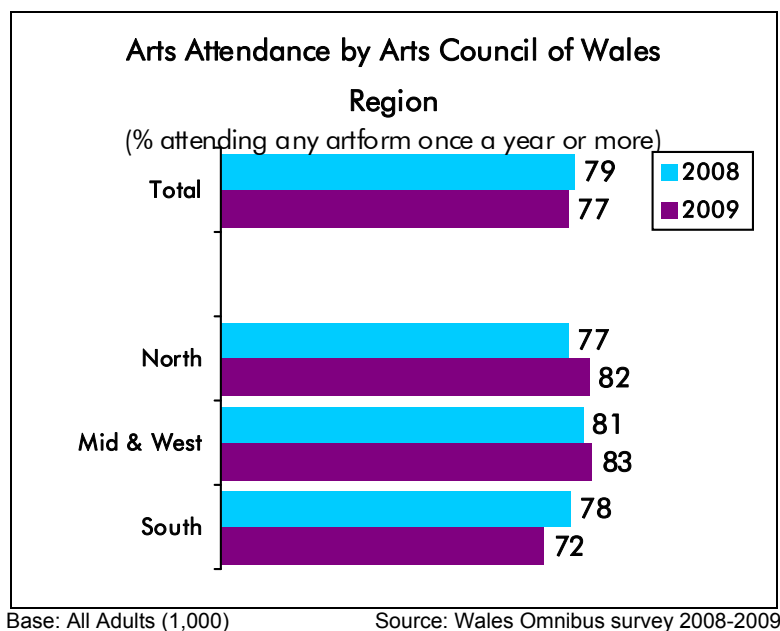
3.3.3 By Gender

Typically there has been little difference over the years in overall arts attendance by gender, however 2008 saw a change in the data with females becoming more likely than males to attend an arts event (82% vs 75%). However, in 2009 this trend has not continued and due to a marginal increase amongst men and a small decrease amongst women, there is again very little difference in propensity to attend by gender - 76% of men and 78% of women in 2009 reported attending an arts event once a year or more, this is shown on the chart overleaf:



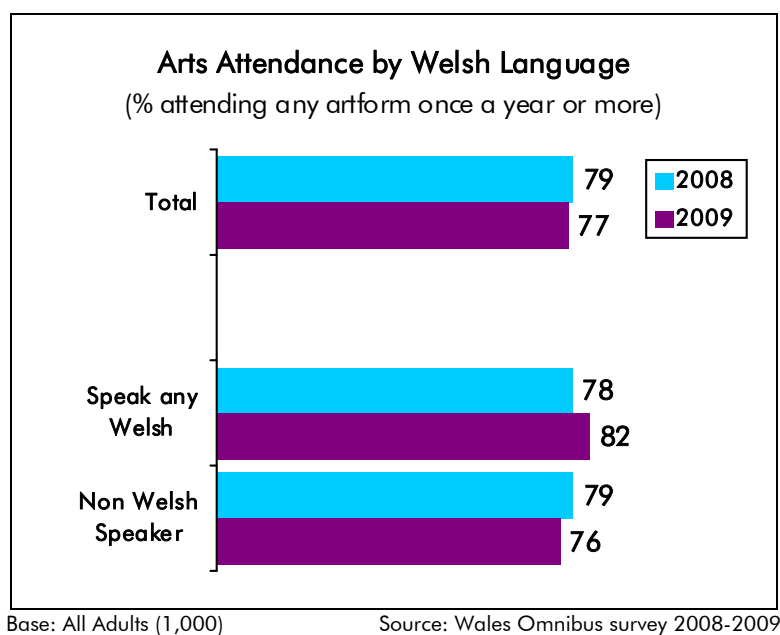
3.3.4 By Region

Adults in the North, and the Mid & West Wales regions are more likely than those in the South to attend arts events which is a similar picture to last year:



- Last year saw an increase in attendance in the South taking attendance levels up to those seen across the rest of the country. However, this increase has not been sustained in 2009, and attendance in the South is now closer to the levels typically reported in this area, at 72% (six percentage points lower than last year). Small increases across the rest of Wales show that attendance is now very similar across both Mid & West Wales (83%) and North Wales (82%).

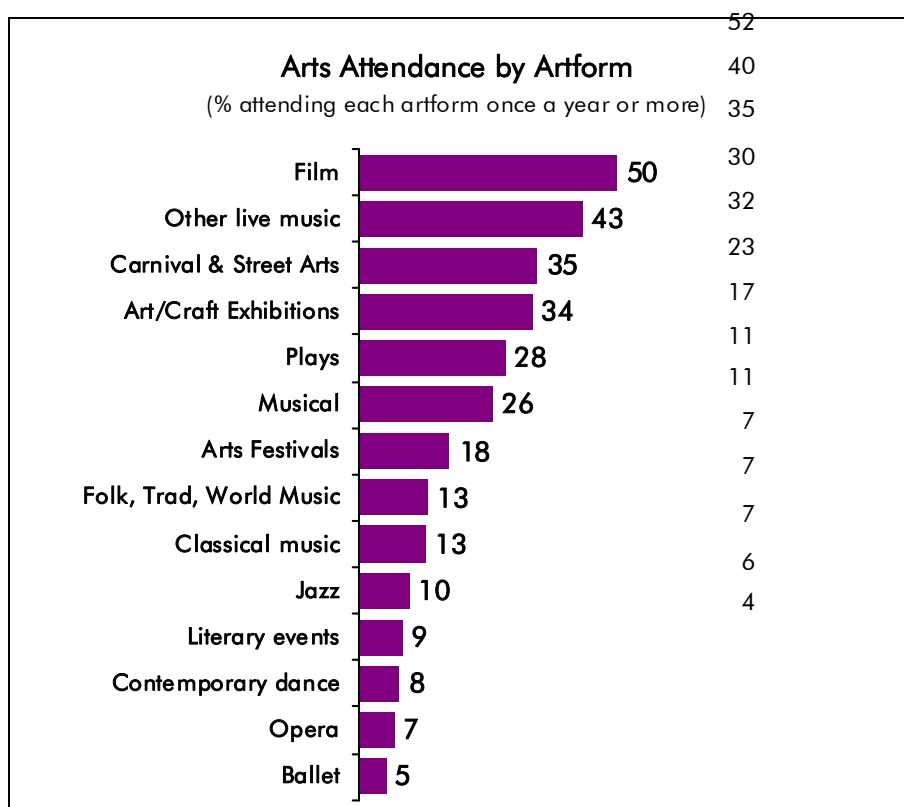
3.3.5 By Welsh Language



- There has been a small increase in attendance amongst Welsh language speakers since last year, and a small decrease amongst non-Welsh speakers, meaning that at 82%, Welsh language speakers were more likely to attend an arts event in 2009, than non-speakers, at 76%. In 2008 there was little difference in attendance by Welsh language speakers.
- This finding correlates with the regional findings discussed above: last year there was an increase in attendance in the South, where Welsh is less likely to be spoken, whereas this year there has been a decrease in attendance in the South and an increase in the North, where the language is more likely to be spoken.

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 adults who attend each art form once a year or more often. The chart shows the most recent findings, from the 2009 survey and also shows the 2008 findings, for comparison as a column next to the bar chart:



Base: All Adults (1,000)

Source: Wales Omnibus survey 2008-09

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 ten years and looking at any demographic and regional variations. In summary, attendance to the top three art forms is largely unchanged year-on-year, with Cinema still the most attended at 50% (although this is down two percentage points on last year to the same level as 2007) and other live music the second most well attended at 43% (continuing the increase seen last year and showing a further three percentage points yearly increase). Carnival and Street Arts is unchanged at 35%. Some small changes amongst the other art forms include:

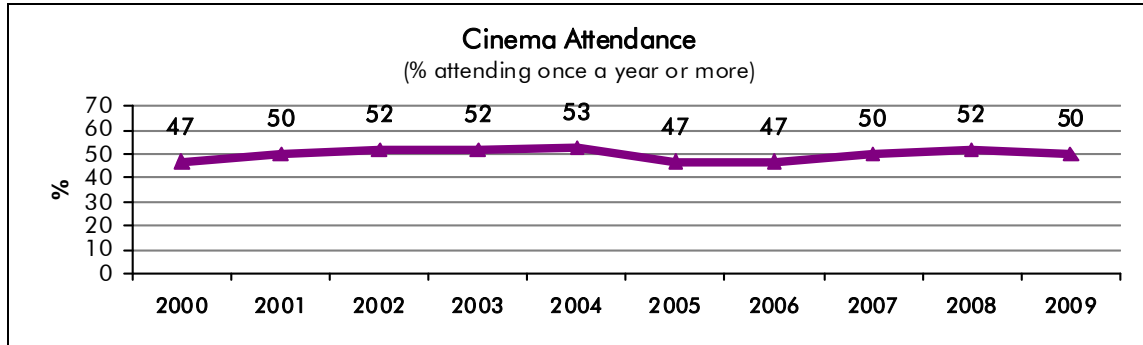
- Attendance at Art Galleries and Exhibitions increased by four percentage points to take it to 34%, now ahead of plays, which had a four percentage point decrease to 28%. Attendance at art and crafts exhibitions is now almost twice as much as it was ten years ago.
- Musicals have regained the percentage points they dropped last year and have had a three percentage point increase to 26%.
- Attendance to both Classical Music events and Folk, Traditional and World Music events has increased by two percentage points since last year taking them to

13%. This gives Classical Music the first change in the attendance data recorded in ten years.

- The less well attended art forms, shown towards the bottom half of the chart, which had some small decreases in attendance last year have all seen small increases in attendance in 2009. This suggests that last year's results were due to just slight variations in the data and not due to any real downward trends in attendance.

3.5 Cinema

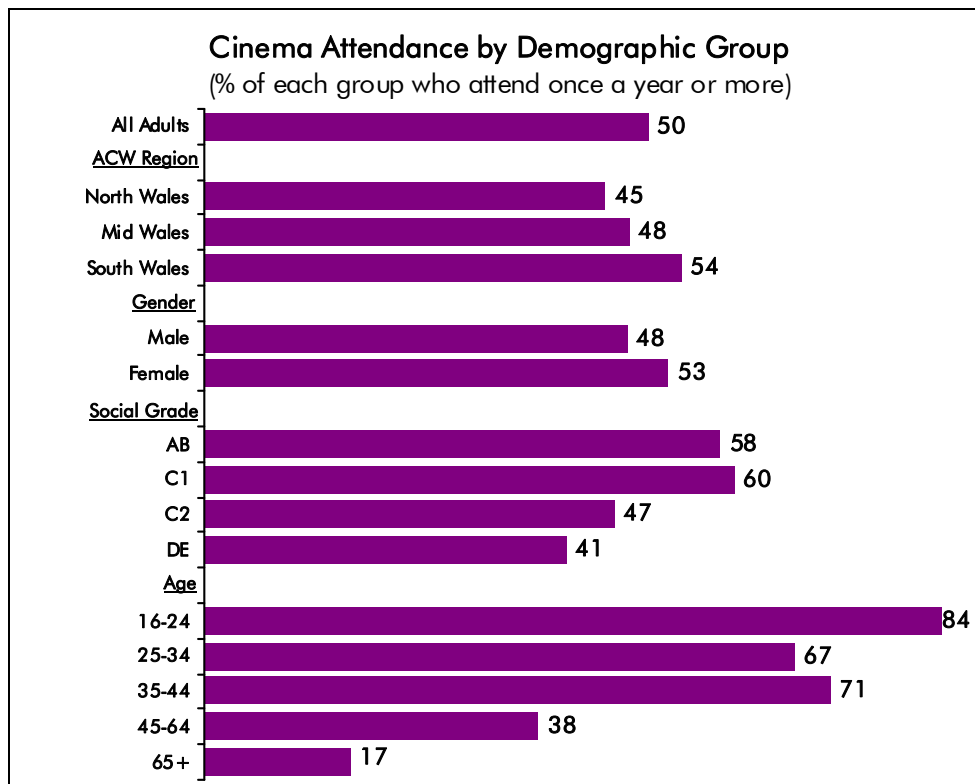
Cinema attendance remains fairly constant over time, with half the population (50%) saying they go to see a film once a year or more often, which is slightly fewer than last year, when 52% did so:



Base: All Adults (1,000)

Source: Wales Omnibus survey 2000-2009

Looking at *who* goes to the Cinema, the following chart shows that younger adults (84% of 16-24s) and ABC1s (59%) are the most likely groups to go to the Cinema. Women (53%) are also more likely to go to the Cinema than men (48%):



Base: All Adults (1,000)

Source: Wales Omnibus survey 2009

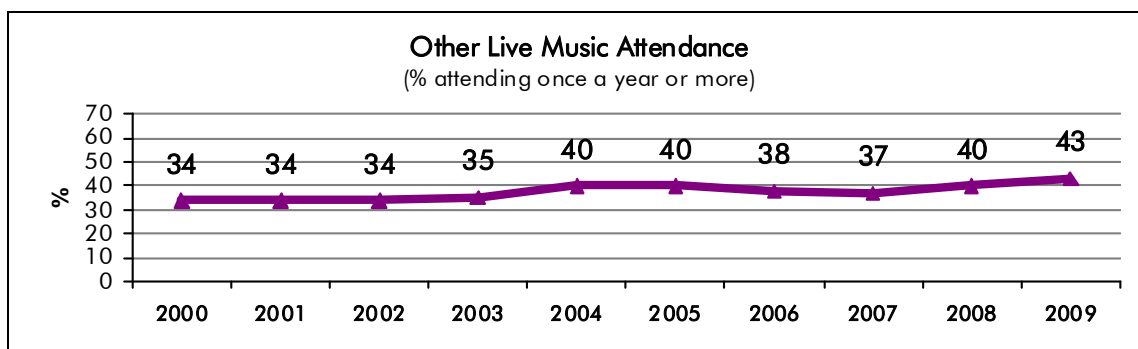
- Those in social grades AB (58%) and C1 (60%) remain much more likely than those in the C2 (47%) and DE (41%) groupings to attend, although there has been a five percentage point decrease amongst C1s since last year, and a small (three percentage point) increase amongst C2s.

- As mentioned earlier (in Section 3.3.2), younger adults are more likely than older adults to go to the Cinema:
 - 16-24 year olds are the age group most likely to go and see a film with 84% now doing so once a year or more often, a two percentage point increase on 2008, which had increased by four percentage points on the year before.
 - The biggest change by age has occurred amongst 35-44 year olds, who at 71% are now more likely than 25-34s to attend, and show an eight percentage point year-on-year increase. At 67% 25-34s propensity to go to the cinema is largely unchanged since last year (66%).
 - The small increases amongst 45+s shown last year have not been sustained with a decrease in attendance amongst both 45-64s (down six percentage points to 38%) and 65+s (down five percentage points to 17%).

- A further notable change in the data over time has been the regional variations in attendance:
 - Attendance in North Wales has fallen a further two percentage points to 45%, from 47% last year and 54% in 2007.
 - Mid and West Wales has increased by four percentage points to 48%.
 - The large increase in the South reported last year - up seven percentage points to 59% - has tailed off to 54%, but does mean that adults in the South are still the most likely to go to the cinema.

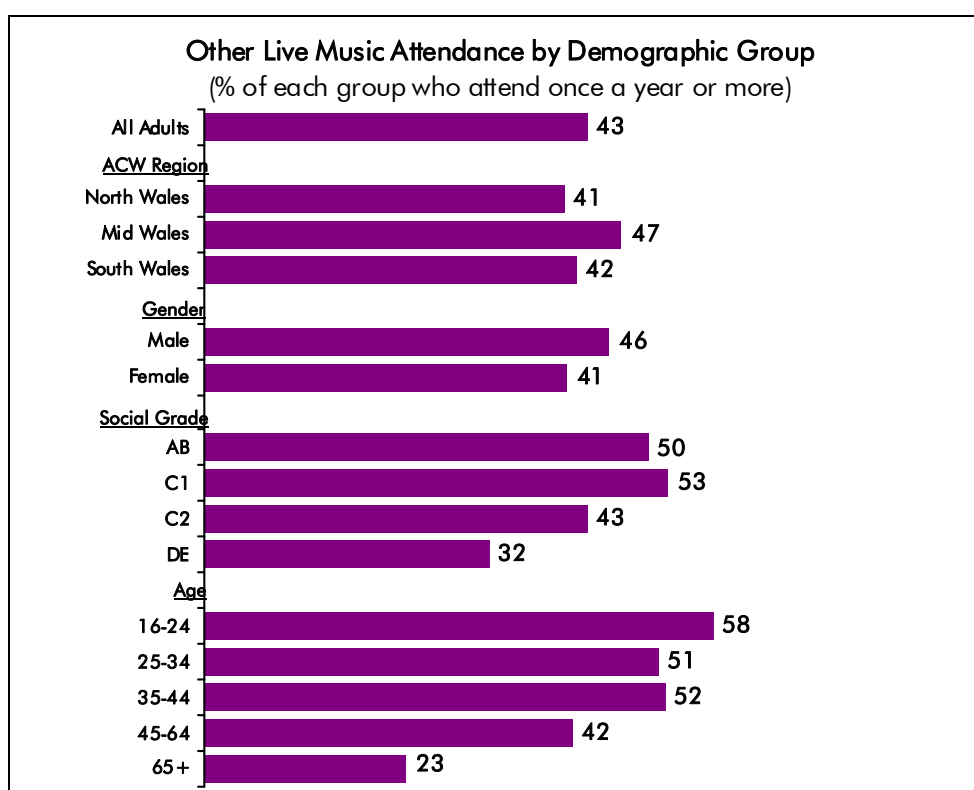
3.6 Other Live Music

Attendance to Other Live Music events is slightly higher than last year, at 43% and is the second most popular art form in Wales after Cinema. This category covers any live music event not already covered by Classical Music concerts, Jazz, Opera, Folk, Traditional & World Music. In 2007 it did look like there might be a slight downward trend in attendance occurring, however, the 2008 and 2009 findings show a sustained increase in attendance taking Other Live Music to its highest attendance figure seen over the last ten years:



Base: All Adults (1,000)

Source: Wales Omnibus survey 2000-2009



Base: All Adults (1,000)

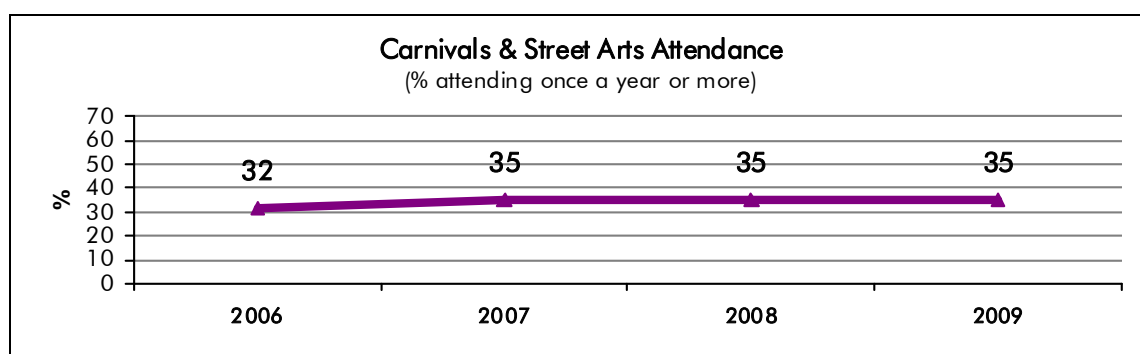
Source: Wales Omnibus survey 2009

- The overall increase in attendance seems to be driven by increased attendance in Mid and West Wales, where attendance has increased by six percentage points year-on-year to 47%. There has also been a small increase in the South (up three percentage points to 42%) building on the upward trend in attendance in this region recorded last year. Attendance in the North remains constant at 41%.

- ABs (50%) and C1s (53%) are more likely to attend live music than C2s (43%) and DEs (32%). The likelihood of attending other live music events is largely unchanged amongst C2s and DEs. The differences between the groups have come about due to an increase in attending amongst ABs and C1s (up nine percentage points and eight percentage points respectively).
- Younger adults are much more likely to go to other live music events than older adults – 58% of 16-24s and over half of 25-44s attend these events, compared with 42% of 45-64s and just 23% of those aged 65+.
- Men are more likely than women to attend Other Live Music events – 46% vs. 41%, which is a change since last year when there was no difference between men and women (both 40%). This is one of the few art forms where this is the case.

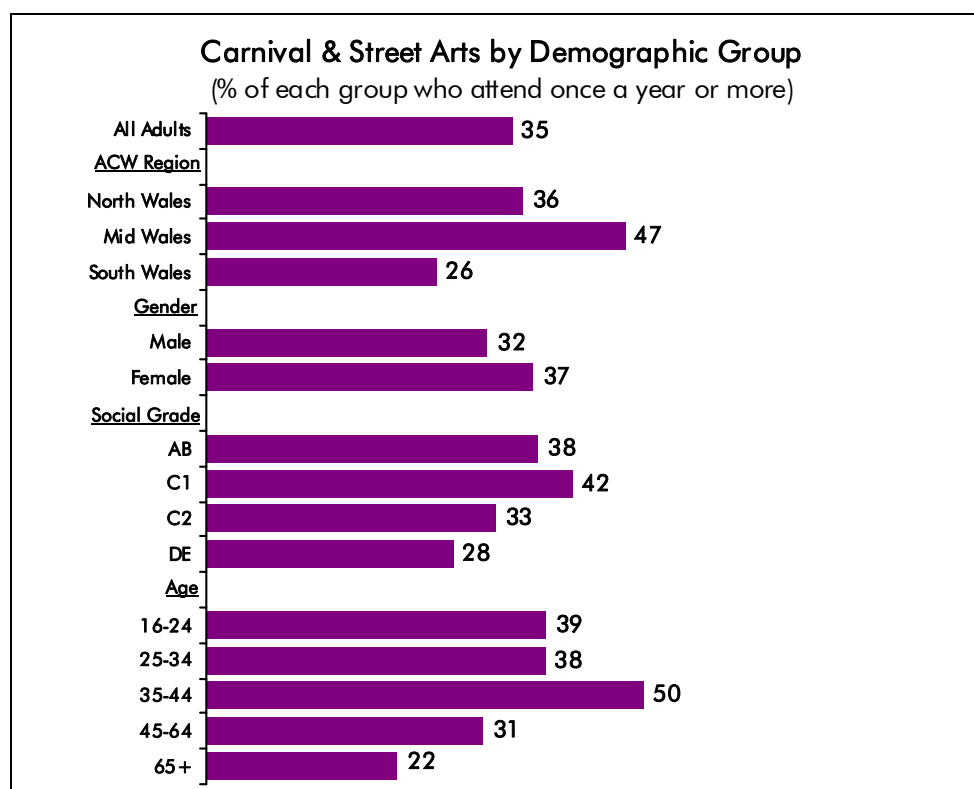
3.7 Carnivals and Street Arts

The category of Carnivals and Street Arts was added to the Arts Council of Wales Omnibus questionnaire in the 2006 survey, so we only have four years worth of data to look at in terms of trends. To date it appears that attendance to these events remains constant over time and again there has been no change in attendance this year, with just over a third of adults (35%) saying they go to Carnivals and Street Arts on a yearly plus basis:



Base: All Adults (1,000)

Source: Wales Omnibus survey 2006-2009



Base: All Adults (1,000)

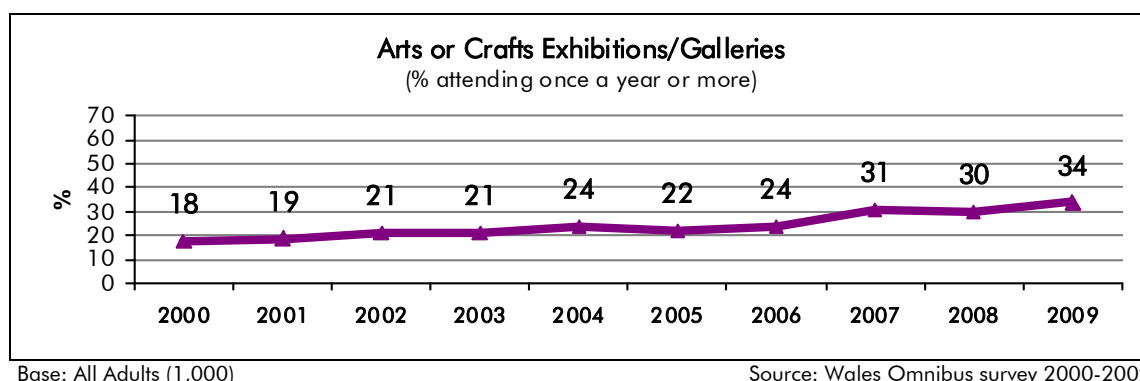
Source: Wales Omnibus survey 2009

- Those in Mid & West Wales are still much more likely than elsewhere to go to Carnivals and Street Art events, at 47%, which is very similar to last year.
- ABs (38%) C1s (42%) are more likely than C2s (33%) and DEs (28%) to enjoy Carnivals and Street Arts, and similarly, women (37%) are slightly more likely than men to attend (32%).

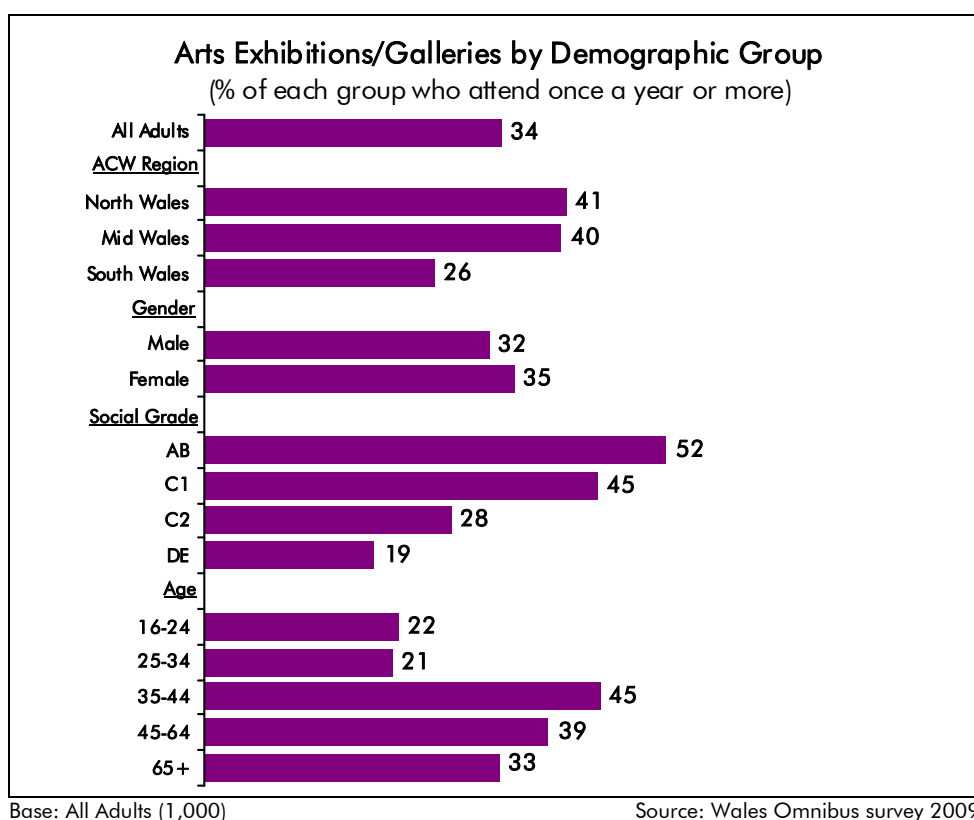
- Attendance to Carnivals and Street Arts continues to vary by age with the under 45s being more likely than over 45s to attend. In 2009, 35-44 year olds are the most likely age group to attend at 50%, which reverses the decline amongst this group recorded last year, where attendance had fallen to 43%. Conversely, whilst 25-34s are still slightly more likely than average to attend (38%) there has been an eight percentage point drop in attendance amongst this age group.

3.8 Arts or Crafts Exhibitions/Galleries

There has been a yearly increase in the proportion of people attending Arts or Crafts Galleries and Exhibitions, with 34% now saying they go to an event at least once a year or more often, an increase of four percentage points on 2008. In comparison to ten years ago, almost twice as many adults are now attending these events:



Adults in social grade AB continue to be much more likely to go to an Art Gallery or Arts/Craft exhibition with 52% doing so at least yearly (up one percentage point since 2008). Those in social grade C1 are also more likely than average to attend, with 45% saying they do so, which represents a five percentage point yearly increase. Although C2s and DEs are much less likely to say they enjoy this type of event, with less than a fifth of DEs saying they go once a year or more, there has been a large increase amongst C2s, up eight percentage points to 28%:



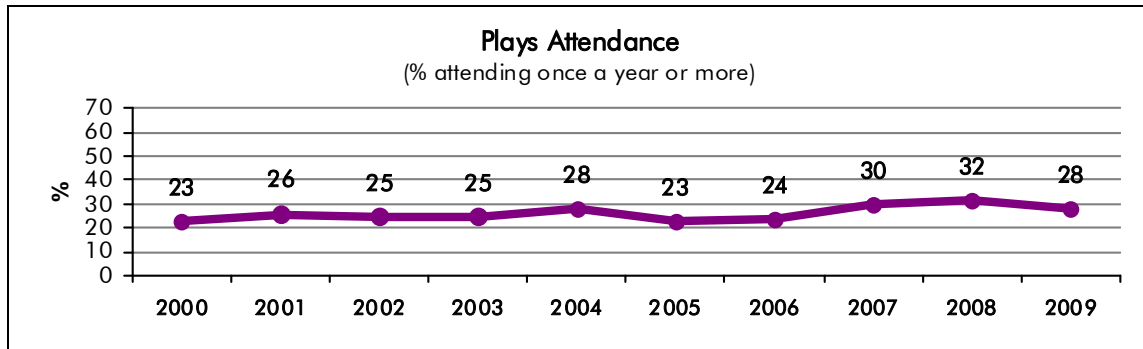
- Middle aged and older adults are generally more likely than younger adults to go to Arts and Crafts exhibitions, with 35-44s (45%) and 45-64s (39%) being the

most likely and those aged 16-24 (22%) and 25-34 (21%) being the least likely. The biggest increase in attendance is amongst the 35-44 year group who have increased by nine percentage points since last year.

- Those living in the North (41%) and in Mid & West Wales (40%) regions continue to be more likely than those in the South to go to Arts or Craft Galleries and Exhibitions, with over four in ten attending yearly, compared with just 26% in the South. Attendance levels in the South are however, unchanged year-on year.
- Although women are slightly more likely than men to go to Arts and Crafts Galleries and Exhibitions - 35% vs. 32% - the 2009 findings show the gap has narrowed between the sexes since last year (36% vs 24%), with mens attendance increasing by 8 percentage points.

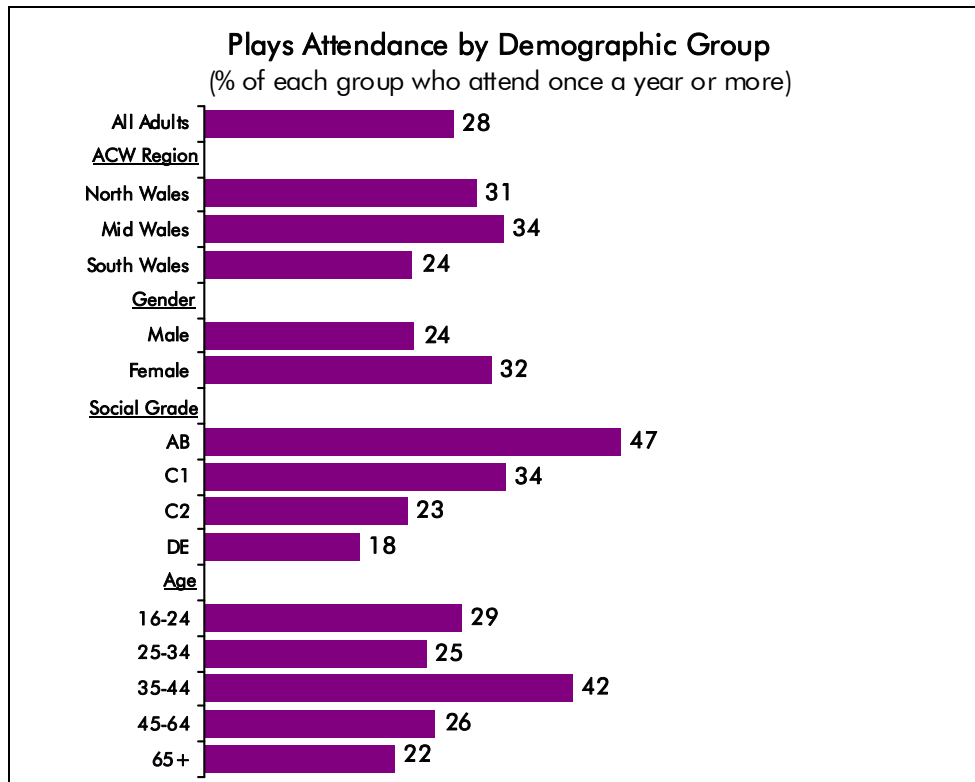
3.9 Plays

The upward trend in attendance to Plays over the last few years has tailed off slightly in 2009, with 28% now saying they go to see a Play once a year or more often, which is a four percentage point yearly decrease. However, attendance levels are still slightly higher than those recorded in the early and mid 2000s:



Base: All Adults (1,000)

Source: Wales Omnibus survey 2000-2009



Base: All Adults (1,000)

Source: Wales Omnibus survey 2009

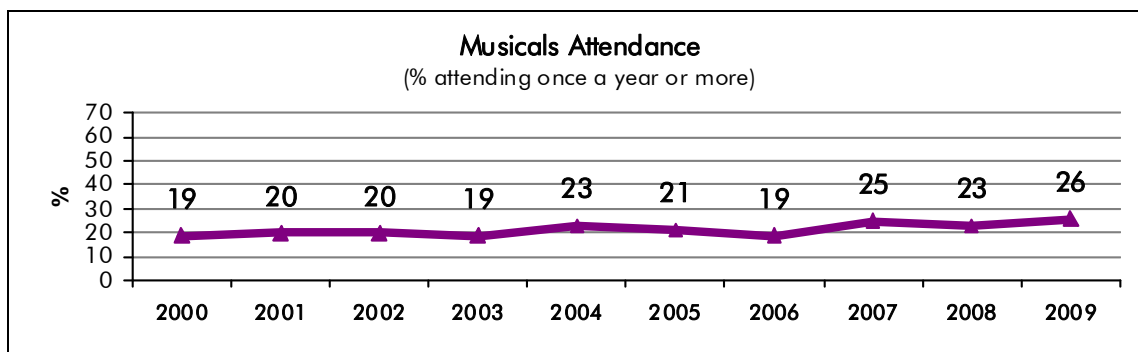
- Women continue to be more likely to prefer Plays to men, with 32% saying they go to a Play at least once a year or more, compared with 24% of men.
- Attendance at Plays is also much more popular amongst those in the AB social grade, with almost half of this group enjoying seeing a Play on at least a yearly basis (47%). Those in the C1 grouping are also more likely than average to attend, at 34%.
- In terms of age, the 35-44 year group are now the most likely to attend plays, at 42%, which represents a four percentage point yearly increase. In 2008, 25-34s

were the most likely to go to plays, but this group has dropped by eight percentage points year on year to 25%, making them now less likely than average to do so. The over 65s remain the least likely age group to attend plays, at 22% and 45-64s are also less likely than average to do so, falling nine percentage points since last year to 26%.

- Attendance at Plays remains slightly more popular in the Arts Council of Wales region of Mid & West Wales (34%) than elsewhere, although this is a five percentage point decrease since last year. Attendance in the North has in turn increased by five percentage points, returning attendance levels to those more typically recorded there, at 31%. Similarly, attendance in the South is now also more comparable with previous years at 24%, having witnessed an eight percentage point decrease since last year.

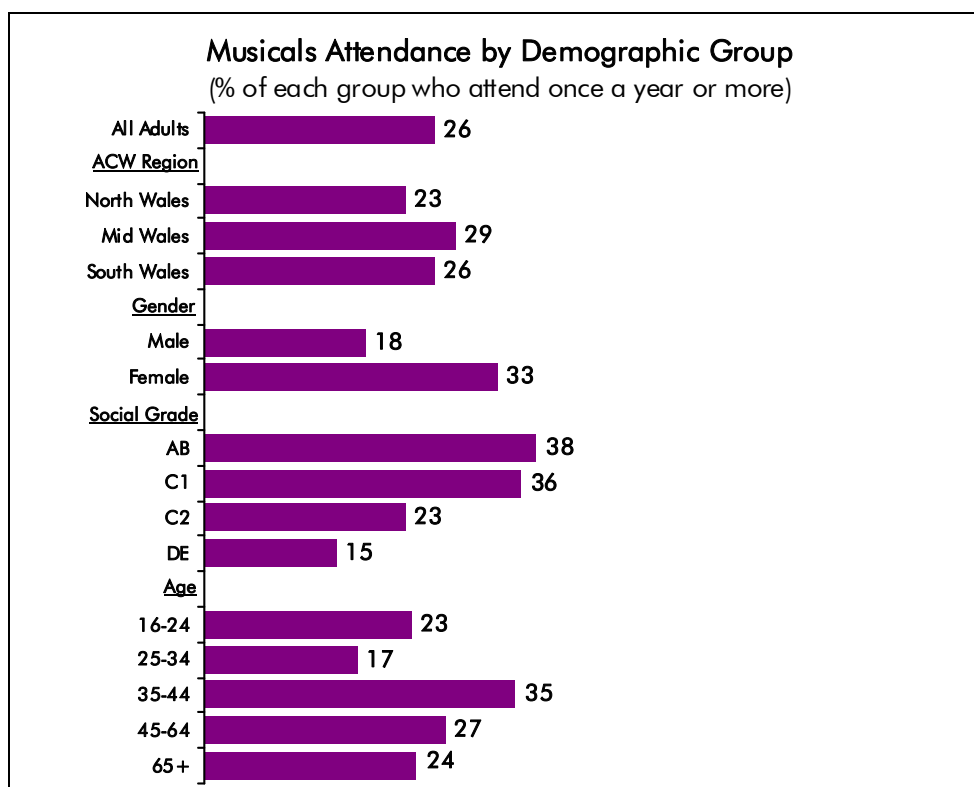
3.10 Musicals

Just over a quarter (26%) of all respondents said they go to Musicals once a year or more often which is an increase since last year of three percentage points. Attendance levels appear to be gradually rising over the last ten years, from 19% in 2000 to 26% in 2009, however there has been some fluctuation in the findings, with as few as 19% also attending in 2006:



Base: All Adults (1,000)

Source: Wales Omnibus survey 2000-2009



Base: All Adults (1,000)

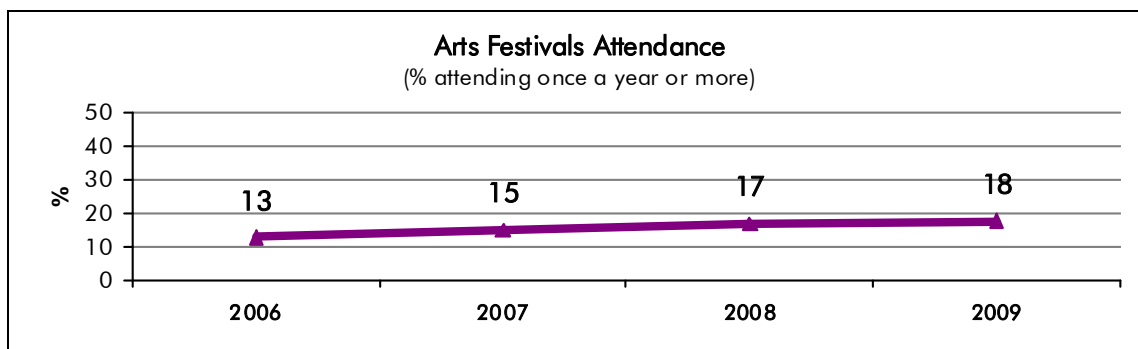
Source: Wales Omnibus survey 2009

- Musicals are much more popular amongst women who are almost twice as likely as men to go once a year or more (33% vs. 18%).
- Similarly, those in social grades AB (38%) and C1 (36%) are much more likely than average to go to Musicals.
- Musicals seem to be more popular amongst the 35-44 year age group than any other, with 35% attending once a year or more often which represents a considerable increase since last year, when 18% said they went to Musicals.

- There is little real regional variation in propensity to attend, apart from those in Mid/West Wales being slightly more likely to go to Musicals and those in the North slightly less likely to do so.

3.11 Arts Festivals

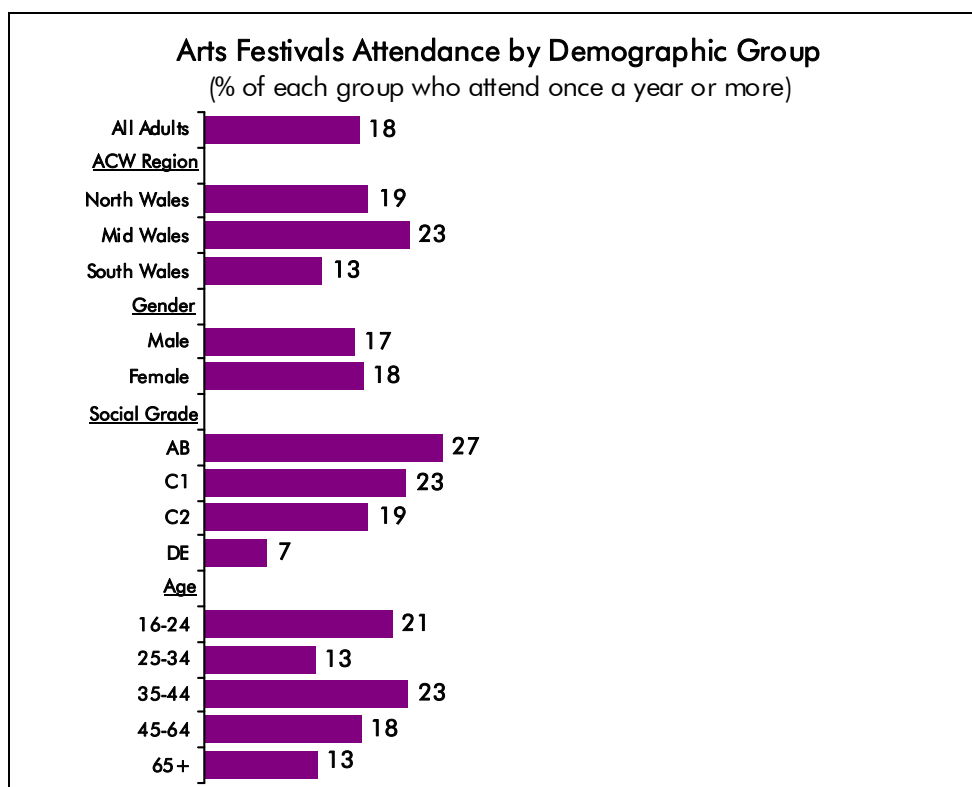
Attendance levels at Arts Festivals continue to increase, with 18% now saying they go once a year or more. This category was added to the survey in 2006, so to date there are only four years of comparison data available, however, they do show a small, but steady increase in attendance over time:



Base: All Adults (1,000)

Source: Wales Omnibus survey 2006-2009

The most notable difference in propensity to attend is by social grade, with 27% of ABs going to Arts Festivals on a yearly basis or more, compared with 7% of DEs. There has, however, been a five percentage point increase amongst C2s who are now as likely as average to attend Arts Festivals, at 19%:



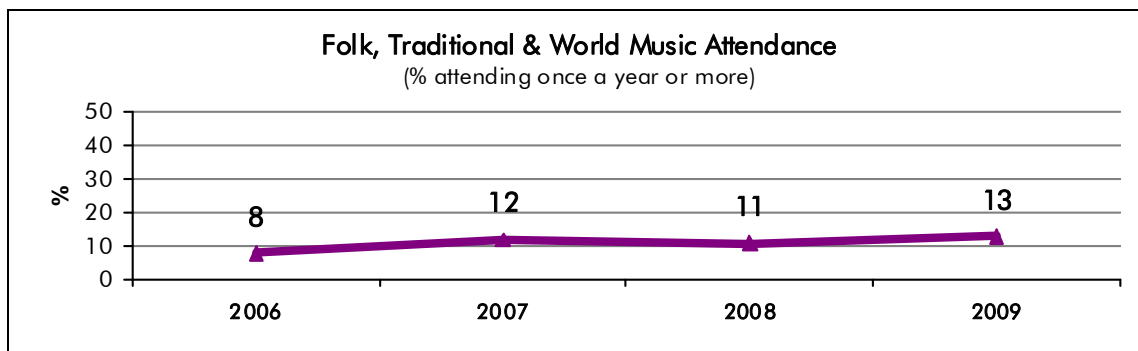
Base: All Adults (1,000)

Source: Wales Omnibus survey 2009

- In terms of age, there was a mixed picture, with both those aged 25-34 and those aged 65+ being less likely to attend (13%), whilst 16-24 year olds (21%) and 35-44s (23%) were more likely than average to do so.
- Attendance to Arts Festivals is now highest in Mid & West Wales, at 23% - up seven percentage points since last year.

3.12 Folk, Traditional, World Music

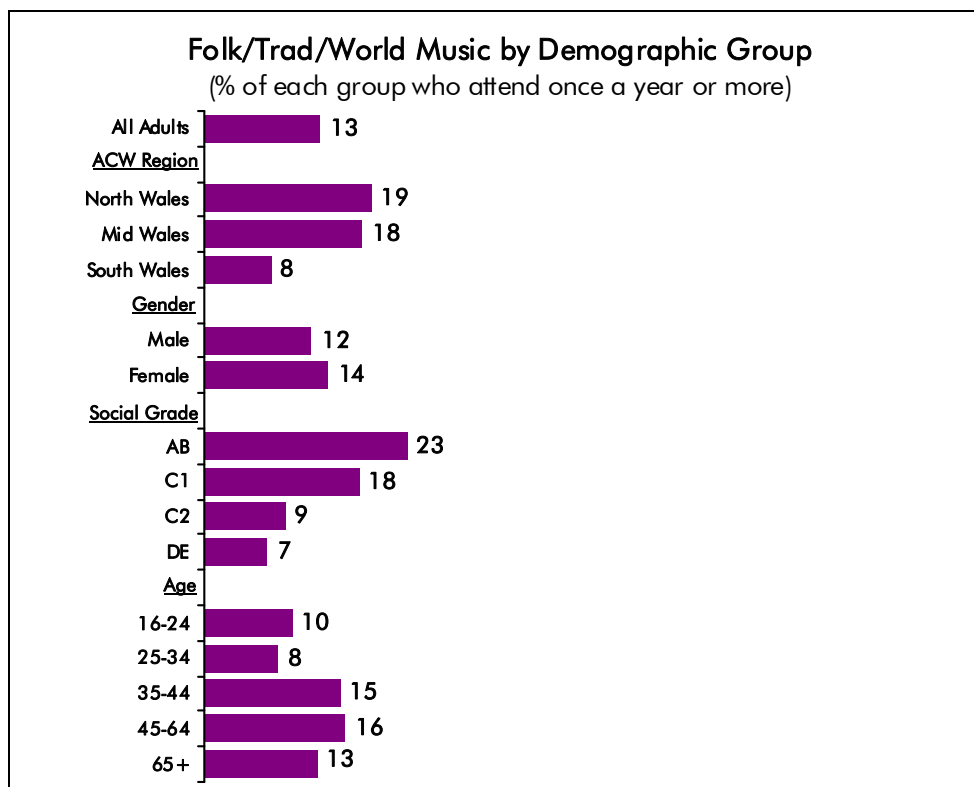
Folk, Traditional and World Music Events was also a category added to the survey in 2006, and therefore there are only four years worth of comparison data available. At 13%, the proportion saying they attend these types of events in 2009 is slightly higher than last year, (when it was at 11%).



Base: All Adults (1,000)

Source: Wales Omnibus survey 2006-2009

ABs are the most likely demographic grouping to attend at 23%, followed by C1s at 18%, compared with just 9% of C2s and 7% of DEs:



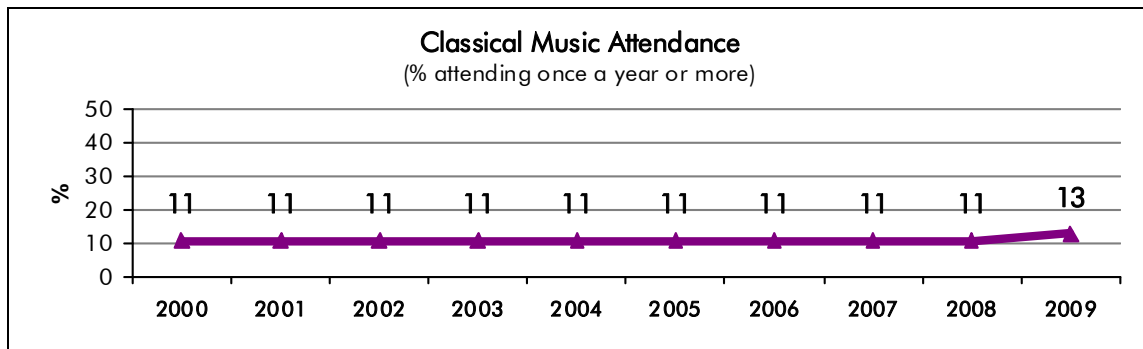
Base: All Adults (1,000)

Source: Wales Omnibus survey 2009

- There has been a six percentage point increase in attendance in both North (19%) and Mid & West Wales (18%), whilst attendance in the South is largely unchanged (down one percentage point to 8%).

3.13 Classical Music

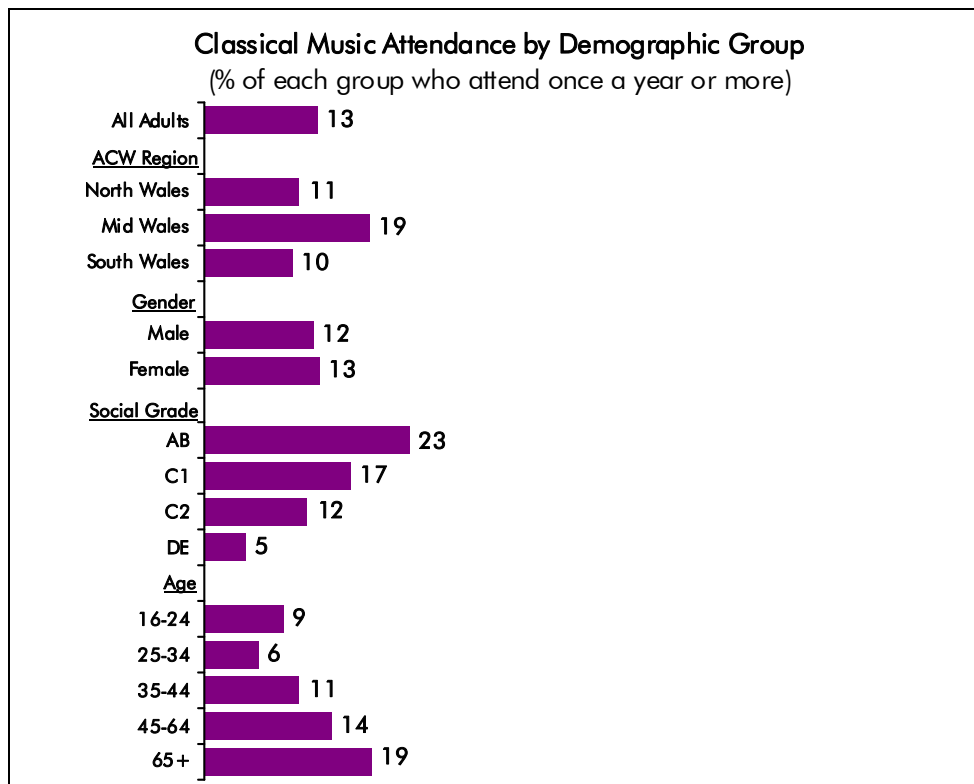
For the first time in ten years, attendance levels for Classical Music have experienced a small increase, up by two percentage points to 13%:



Base: All Adults (1,000)

Source: Wales Omnibus survey 2000-2009

- Attendance levels to Classical Music events differ in terms of age and social grade:



Base: All Adults (1,000)

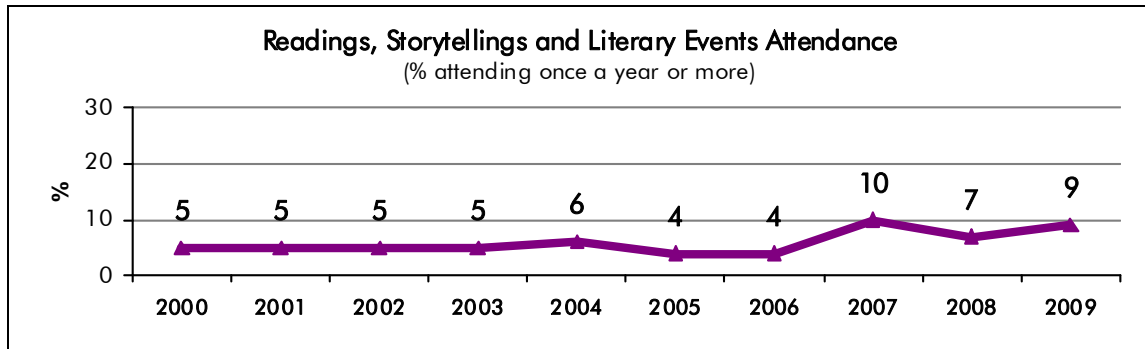
Source: Wales Omnibus survey 2009

- ABs (23%) are over four times more likely than DEs (5%) to go to Classical Music events. C1s (17%) continue to be also slightly more likely than average to attend (up three percentage points year-on-year), and C2s have also increased since last year, to 12% (up seven percentage points).
- Classical Music is clearly more popular with older adults who are significantly more likely than younger adults to attend. 19% of people aged 65+ go to such an event once a year or more, compared with 9% of 16-24 year olds and just 6% of 25-34 year olds.

- In terms of regional attendance, an increase in Mid & West Wales makes this the most likely region to attend, at 19% (up six percentage point year-on-year) whereas there is little difference between those in the North (11%, down two percentage points) or South (10%, up two percentage points).
- Although men are marginally less likely than women to attend classical music events, there has been an increase in attendance amongst men - up four percentage points since last year to 12%.

3.14 Literary Events

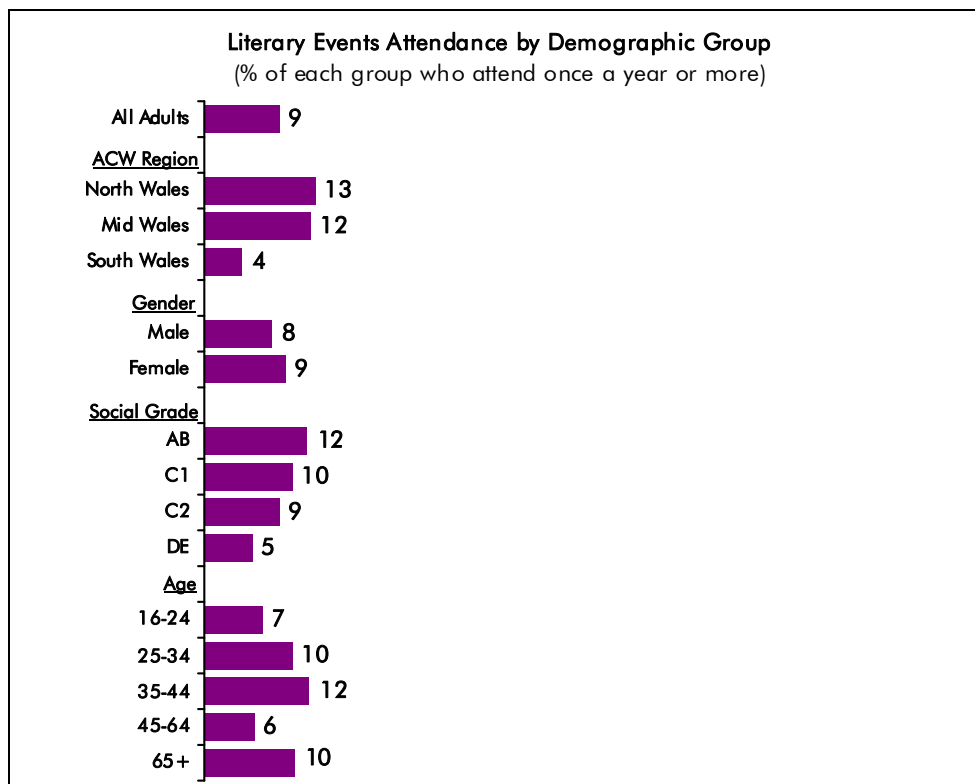
9% of adults say they attend Readings, Storytellings and other Literary Events once a year or more often. This represents a two percentage point increase since last year, reversing the small dip in attendance recorded in 2008:



Base: All Adults (1,000)

Source: Wales Omnibus survey 2000-2009

ABs (12%) and 35-44 year olds (12%) are the most likely to go to Readings, Storytellings and other Literary Events. There has also been growth in attendance for C2s, from 4% in 2008 to 9%:



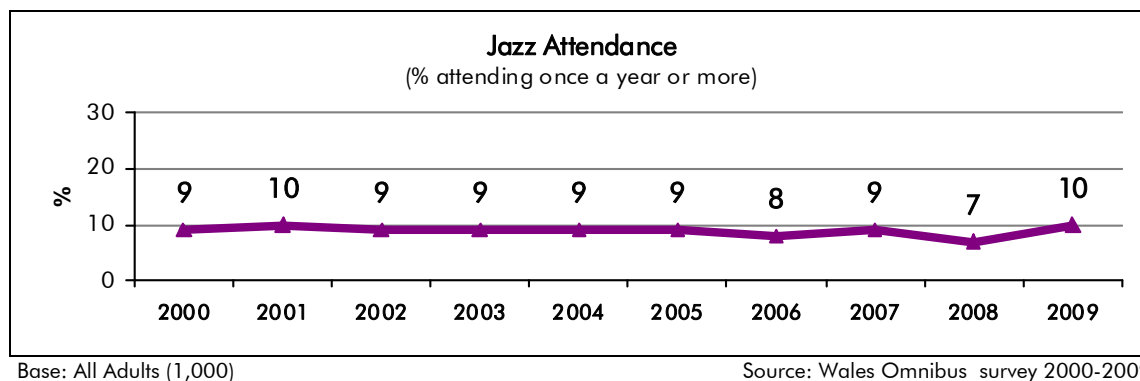
Base: All Adults (1,000)

Source: Wales Omnibus survey 2009

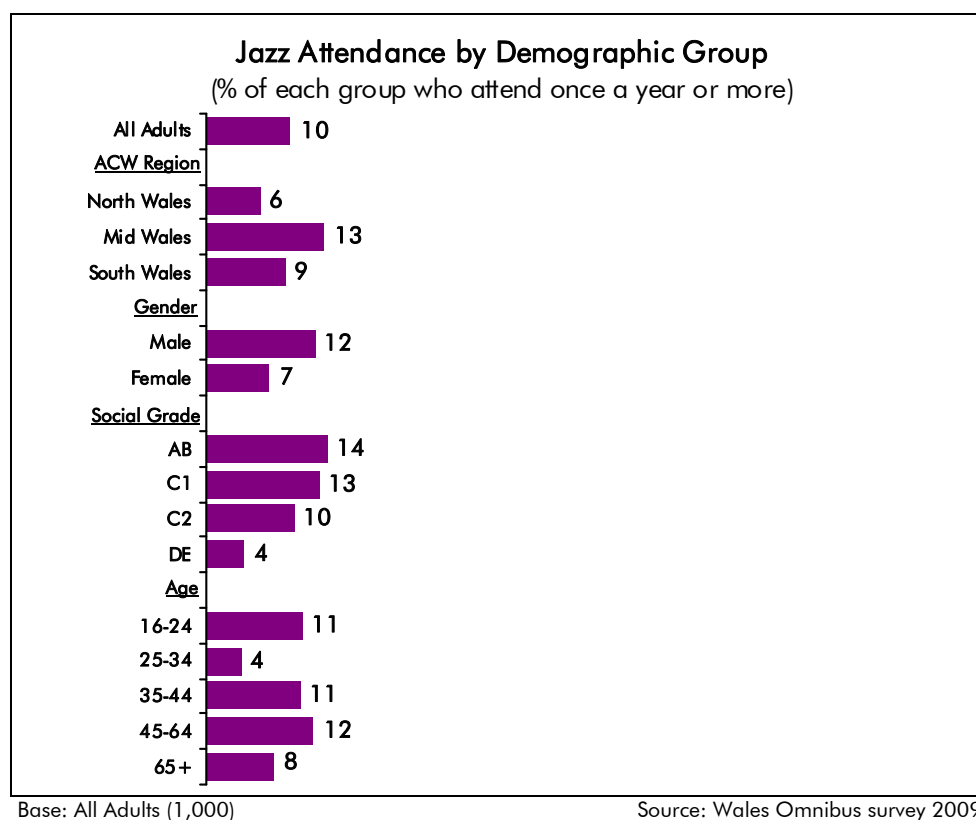
- Adults in the North (13%), and Mid & West (12%) regions are much more likely to attend literary events than those in the South (4%).
- As mentioned, ABs are the most likely to attend Literary events (12%), however, the biggest increase in attendance has come amongst the C2 group who have seen a five percentage point increase taking them to 9%.

3.15 Jazz

There has been an increase in the proportion attending Jazz concerts since last year, with 10% now saying they do so once a year or more often. It is encouraging that the dip to 7% recorded last year appears to have been reversed:



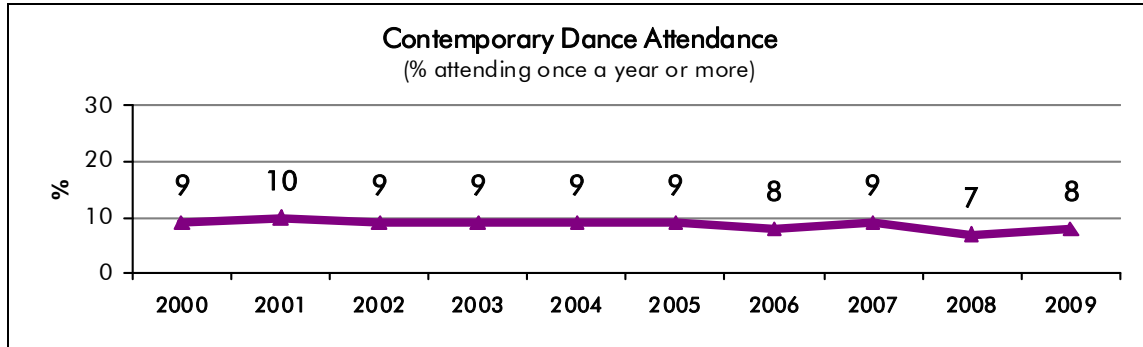
As previously recorded, social grade continues to be a determinant in likelihood of attending Jazz events, with the medium being more popular amongst ABs (14%) and C1s (13%) than those in social grades C2 (10%) or DE (4%), although C2s have increased by three percentage points since last year:



- There were some other demographic and regional variations recorded this year, with men (12%) more likely than women (7%) to attend, and those in Mid & West Wales being the most likely region to attend, at 13%.
- The picture by age is varied, with 25-34s (4%) and 65+s (8%) less likely than average to attend Jazz events.

3.16 Contemporary Dance

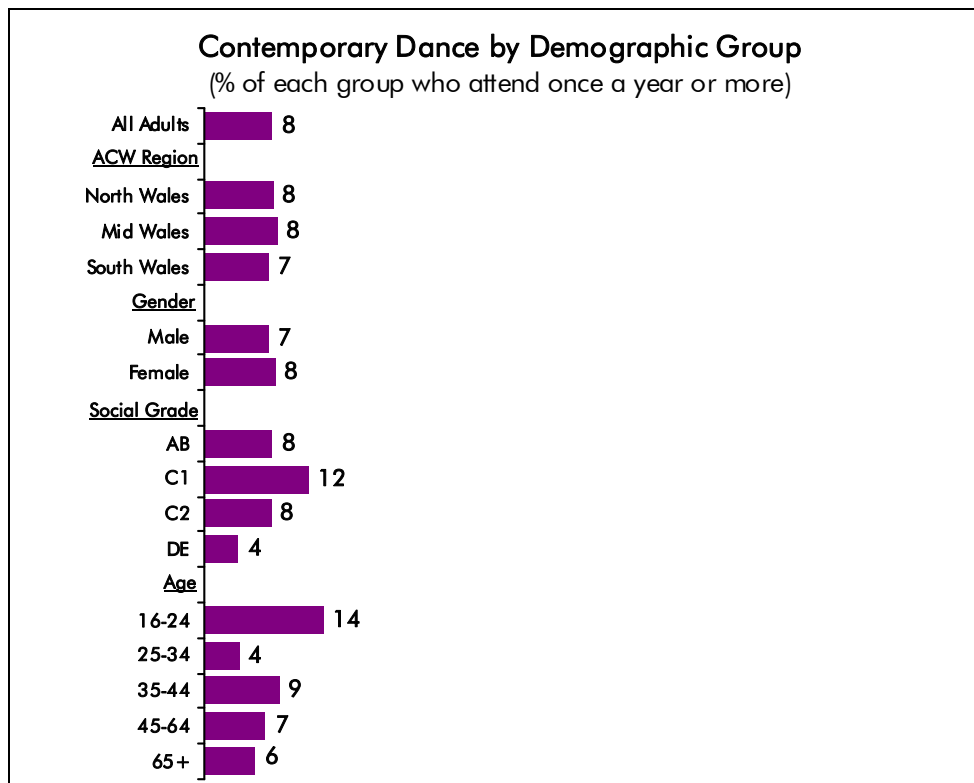
Attendance to Contemporary Dance events is fairly constant over time, with 8% in 2009 attending at least once a year, a one percentage point increase on the previous year:



Base: All Adults (1,000)

Source: Wales Omnibus survey 2000-2009

Contemporary Dance events appeal the most to younger adults. Attendance levels for this age group have increased by 6 percentage points to 14% since last year. In terms of social group it is most popular with C1s (12%), but there is little other variation by demographic grouping and no variation by region:

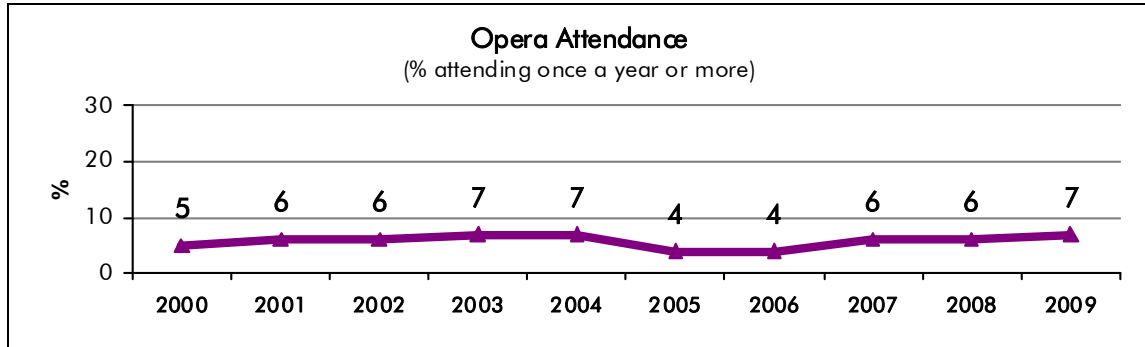


Base: All Adults (1,000)

Source: Wales Omnibus survey 2009

3.17 Opera

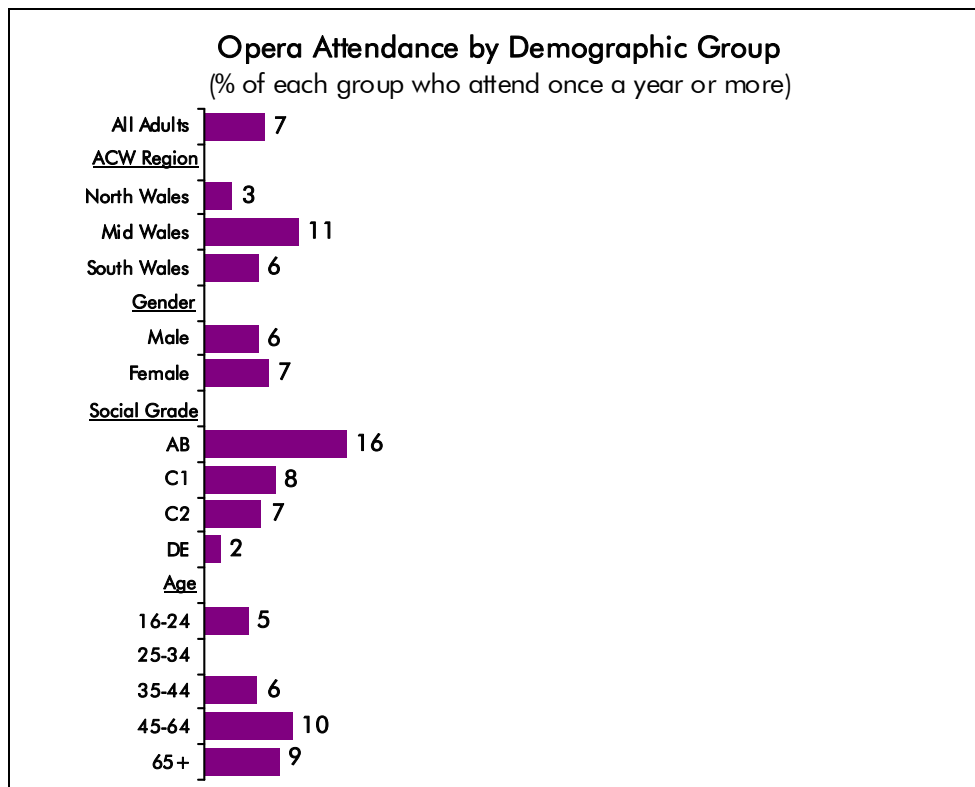
Opera attendance is similar to last year, at 7%, showing that attendance hasn't changed significantly over the last ten years, barring the slightly lower than average attendance seen in 2005/6:



Base: All Adults (1,000)

Source: Wales Omnibus survey 2000-2009

Opera attendance is significantly higher amongst the AB social grade at 16% compared with just 2% of DEs. C1s remain unchanged at 8% whilst C2s have increased slightly, up four percentage points to 7%:



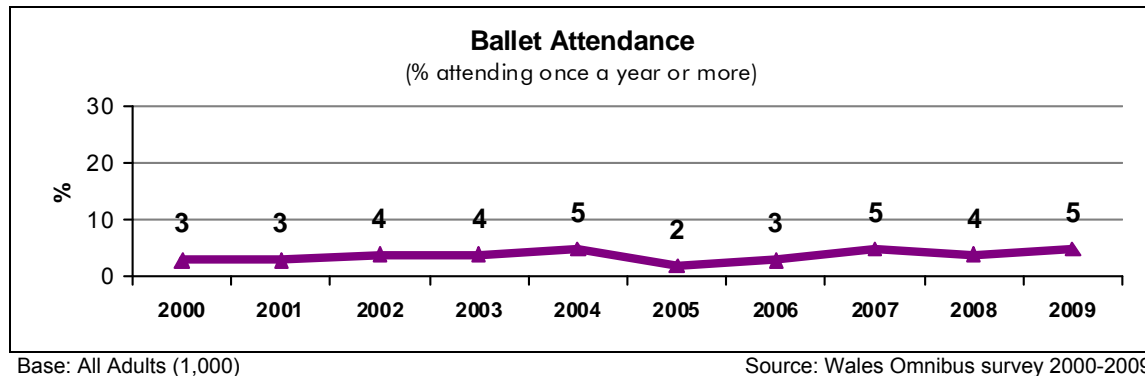
Base: All Adults (1,000)

Source: Wales Omnibus survey 2009

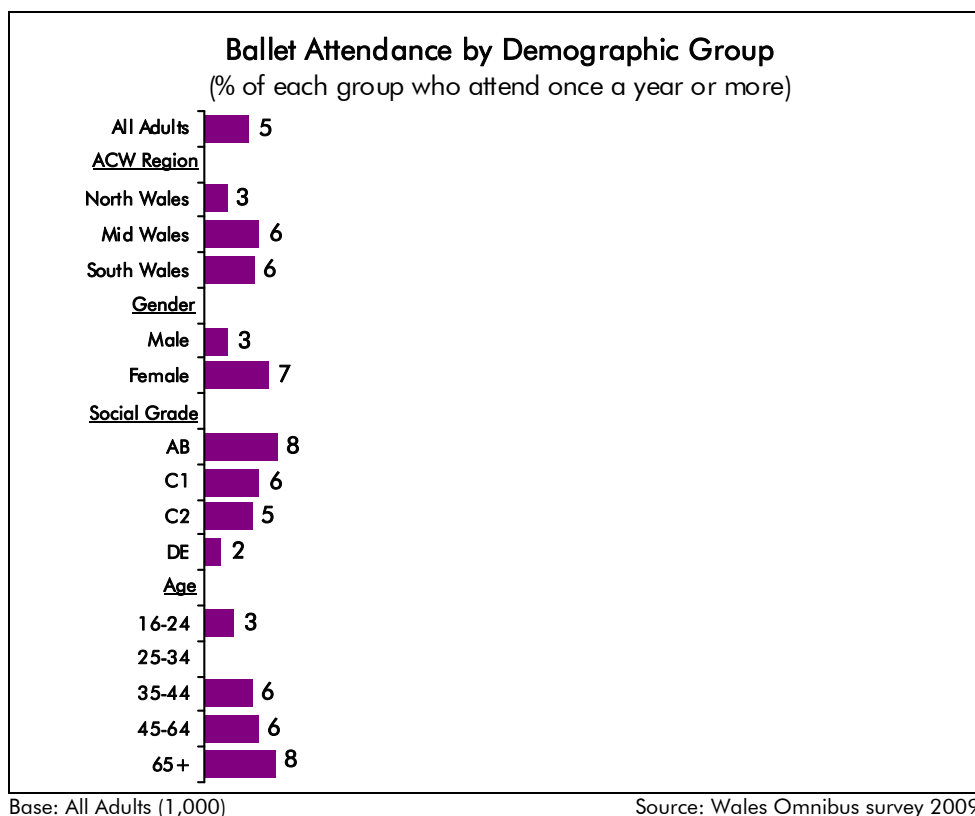
- Opera is more popular with older people, with 10% of 45-64 year olds and 9% of people aged 65 and over going to the Opera once a year or more often, compared with 5% of 16-24s.
- Those in Mid & West Wales are the most likely to attend the Opera, at 11%, up five percentage points since last year, when there was little variation by region in propensity to attend.

3.18 Ballet

5% of adults say they go to the Ballet once a year or more often which is a small (one percentage point) increase on last year. Overall attendance to the Ballet over time remains fairly flat, generally varying between 3% and 5%:



There were some demographic variations in attendance to the Ballet reported this year, most notably by gender, age and social grade. Women, those in the AB social group and older adults more likely than average to attend:



- Last year saw a flattening of the social grade profile, but this has not been repeated in 2009 which shows a more typical picture with ABs being the most likely to attend, at 8%, followed by C1s (6%), C2s (5%) and DEs (2%).
- As previously reported, women are over twice as likely as men to attend the Ballet (7% vs. 3%).

- Over 35s are more likely to attend than under 35s, and 65+s are the most likely to do so, at 8%
- In terms of the regional picture, those in the South and the Mid & West Wales areas (both 6%) are more likely than those in the North to attend (3%). This is very similar to the 2008 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** of any kind including singing, playing or helping out in a choir, operatic society, brass band, orchestra, folk, rock or jazz group
- b. **Drama** or theatrical activity of any kind
- c. **Dance** activity of any kind
- d. **Film and video making, or photography** other than family, holiday or party snaps
- e. **Visual arts and crafts**, for example painting, sketching, computer graphics, pottery, wood-turning, jewellery making, weaving, textiles, knitting or sewing
- f. **Creative writing**, for example poetry or stories
- g. **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)*

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.

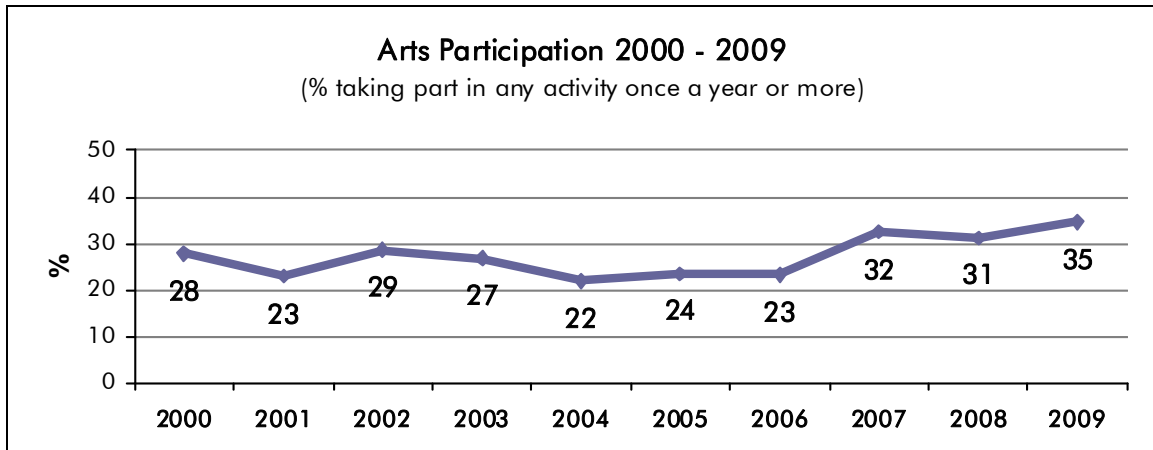
It should be noted that the surveys up to 2008 asked about six artistic activities (a – f above) and the seventh activity, digital art (g), was only added in the November 2009 survey. Therefore the trend data over time will only examine the six comparable activities.

* denotes artistic activity added in 2009.

4.2 Frequency of Participation in Arts Activities - Key Findings

The most recent 2009 Wales Omnibus survey data reveals that 35% of adults in Wales take part in at least one of the six artistic activities once a year or more often which is a four percentage point increase on last year, when 31% took part in an artistic activity. In 2009 an additional category was added to the survey, that of digital arts, and including this in the analysis shows that in total 37% of adults in Wales take part in at least one of the seven artistic activities.

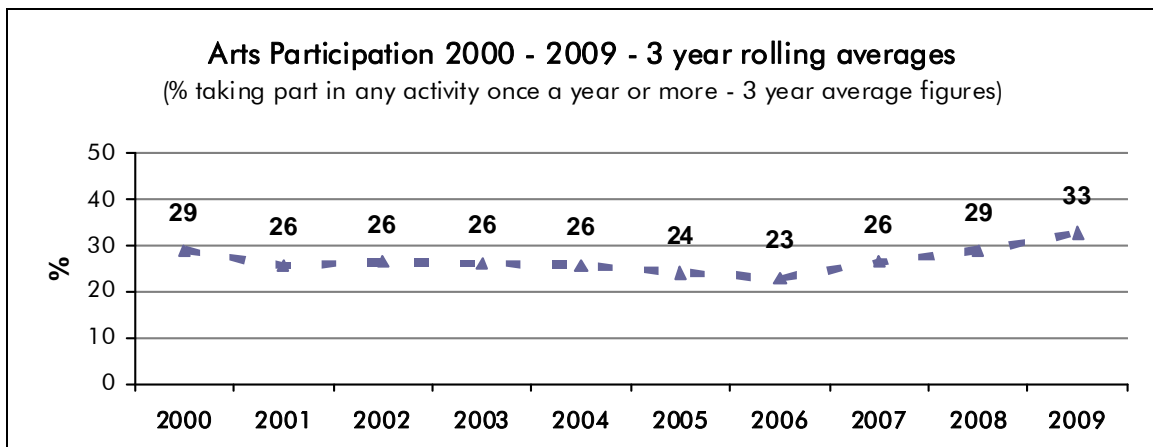
It appears then that the downward shift in participation levels recorded in the early-mid 2000s is now being reversed, as the ten year trend chart overleaf illustrates (based on the six comparable activities asked about over time):



Base: All Adults (1,000)

Source: Wales Omnibus survey 2000 - 2009

Looking at the three year rolling average data to see if there have been any real shifts in participation also shows that average participation levels have increased over the last few years. The graph below shows that at 33%, you can see the average proportion taking part in the three year average period to 2009 is now higher than any point in the last ten years:



Base: All Adults (1,000)

Source: Wales Omnibus survey 2000 - 2009

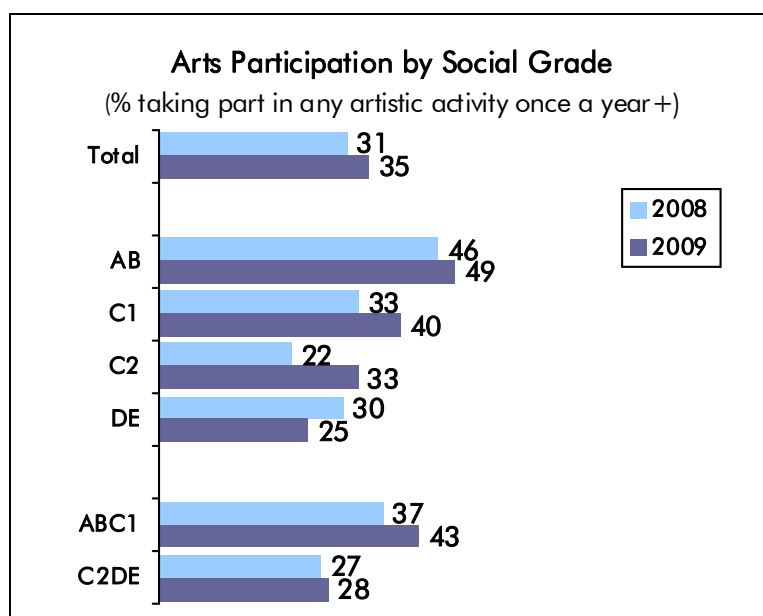
As with the attendance data, in 2009 it was decided to monitor the proportion of adults participating in artistic activities two to three times a year or more often, as well as the proportion taking part on a yearly basis. The results show that 34% of adults take part in one of the seven listed activities two to three times a year or more often, which encouragingly, is only slightly less than the proportion taking part on a yearly basis (37%). Looking only at the six comparable activities asked about over time shows that 32% of adults take part in one of these activities two to three times a year or more often, which is a positive increase on 2008, when 29% did so.

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 adults in each key grouping that take part in any artistic activity. Only the six artistic activities asked about in both 2008 and 2009 are included in this section, therefore the category of digital arts has been excluded for comparison purposes, but is covered in detail in Section 4.7.

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

4.3.1 By Social Grade



Base: All Adults (1,000)

Source: Wales Omnibus survey 2008-9

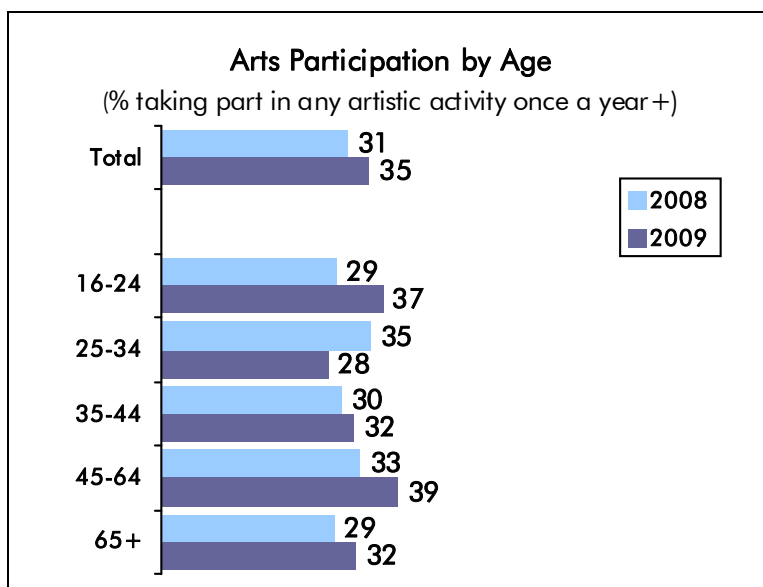
ABs remain the most likely social grade grouping to take part in an artistic activity at 49%, which is a three percentage point increase on 2008. C1s have also increased, rising seven percentage points to 40%, however the biggest increase in participation has come amongst the C2 group, who have increased by 11 percentage points to 33%. Meanwhile, DEs have decreased, losing the five percentage points they had gained last year, to return to a more typical 25%.

Grouping ABC1s (professional and non-manual occupations) together and C2DEs (manual, semi and unskilled occupations and non workers) together shows that 43% of ABC1s take part in artistic activities compared with 28% of C2DEs - thereby widening last year's ten percentage point gap to 15 percentage points. However, last year had seen an atypical decrease in participation amongst ABs which had contributed to the smaller gap between the social grades reported in 2008.

4.3.2 By Age

There is not a great deal of variation in overall participation levels by age, apart from the 25-34 year age group. Participation levels for this age group have declined since last year, returning them to a more usual 28% and making them less likely than average to take part in arts activities.

A further change since last year is the increase amongst both 16-24 year olds (up eight percentage points to 37%) and 45-64s, up six percentage points to 39%):

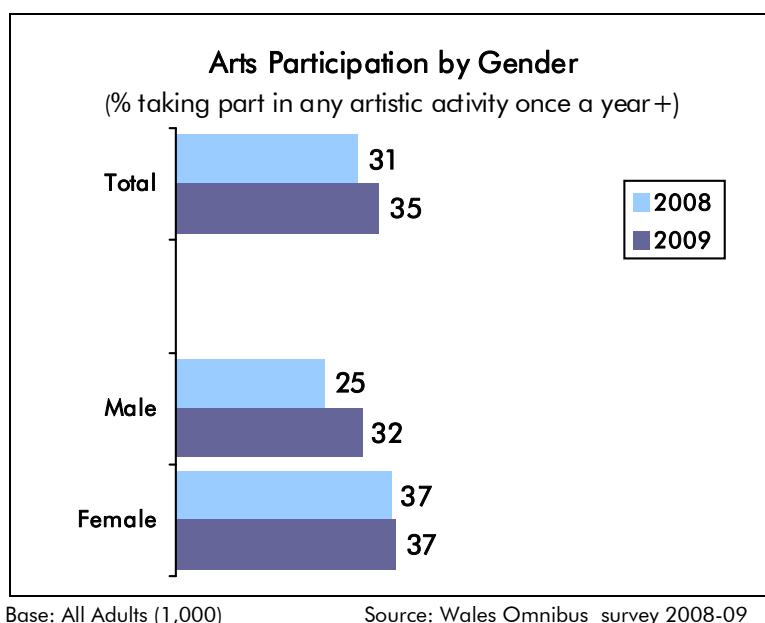


Base: All Adults (1,000)

Source: Wales Omnibus survey 2008-09

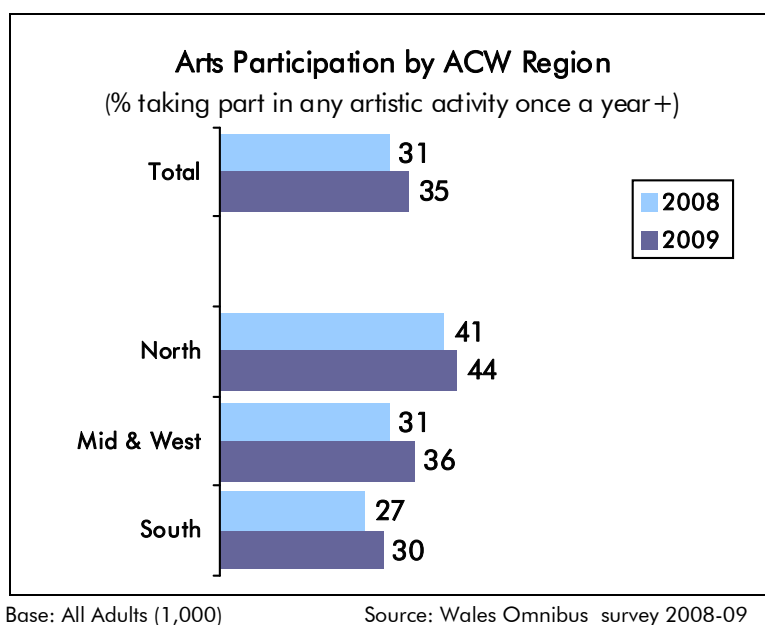
4.3.3 By Gender

Women (37%) are more likely than men (32%) to participate in artistic activities. However, a seven percentage point increase amongst males has narrowed the gap between the sexes, from 12 percentage points in 2008 to five percentage points in 2009:

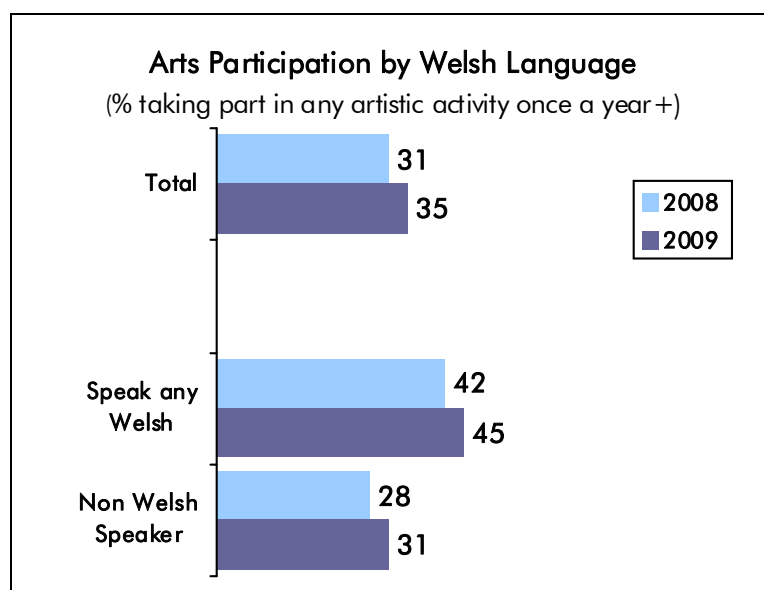


4.3.4 By Region

Participation levels across all regions have increased by a similar proportion, making regional participation similar to last year. People living in the North of Wales are the most likely to take part at 44% (up three percentage points). A five percentage point increase in the Mid & West Wales region takes it to 36% whilst a three percentage point increase in the South brings it up to 30%:



4.3.5 By Welsh Language



Base: All Adults (1,000)

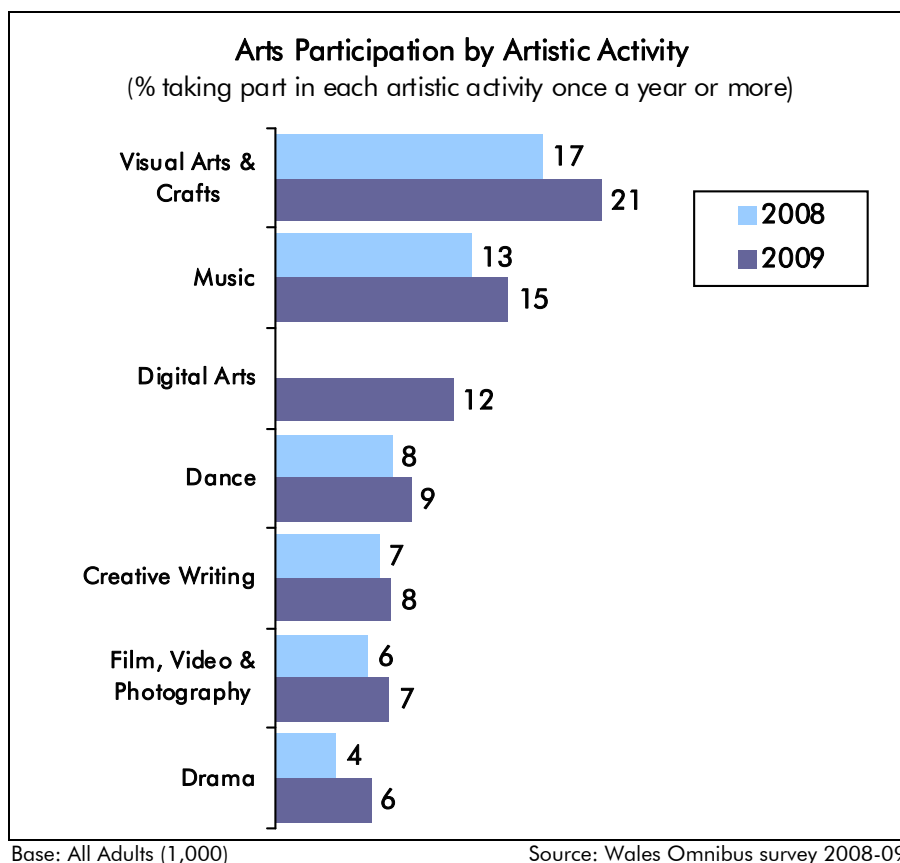
Source: Wales Omnibus survey 2008-09

Welsh language speakers, at 45%, remain more likely than non-speakers, at 31%, to take part in artistic activities, however, both Welsh speakers and non Welsh speakers have increased their participation levels since last year; both groups are up three percentage points since 2008.

As with attendance levels, the regional bias to participation no doubt affects the participation by language findings i.e. participation is higher in the North where Welsh is more likely to be spoken.

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 adults who participate in each individual activity once a year or more often. The chart shows the most recent findings, from the 2009 survey and the 2008 findings, for comparison:

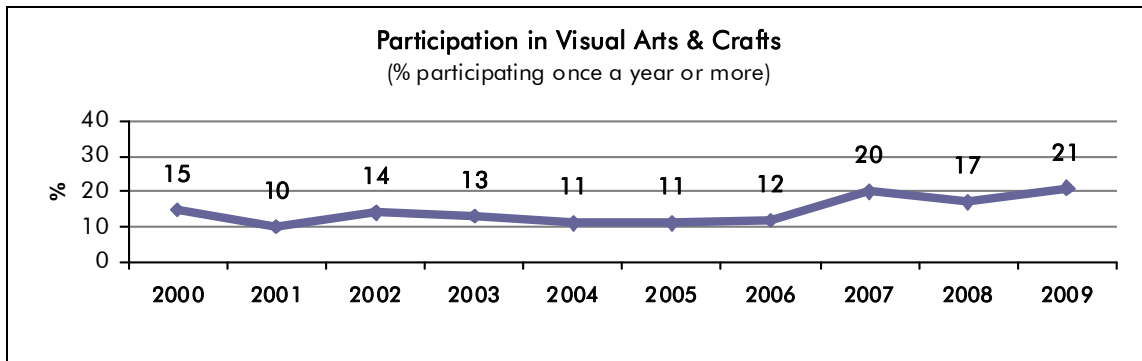


- All activities have seen a small increase in participation levels, particularly Visual Arts & Crafts which are up four percentage points year-on-year, to 21%
- Participation in Musical activities has increased by two percentage points to 15% and remains the second most popular artistic activity to take part in.
- A new category was added to the survey in 2009 – “Digital Arts” – and this is now the third most popular artistic activity, at 12%

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.

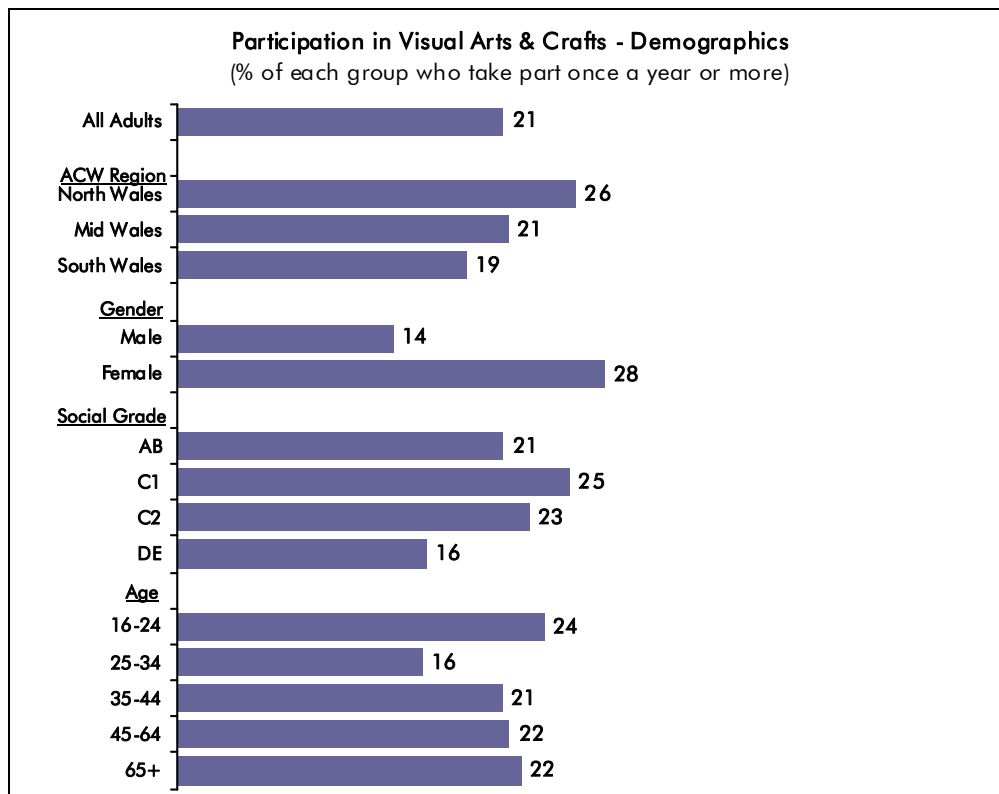
4.5 Visual Arts & Crafts

Participation in Visual Arts and Craft activities (which includes painting, sketching, computer graphics, pottery, wood-turning, jewellery making, weaving, textiles, knitting or sewing) has increased since last year, up by four percentage points, to 21% and is the most often participated in artistic activity. Over the last three years, participation in this activity has increased considerably compared with the levels seen in the early 2000s:



Base: All Adults (1,000)

Source: Wales Omnibus survey 2000-2009



Base: All Adults (1,000)

Source: Wales Omnibus survey 2009

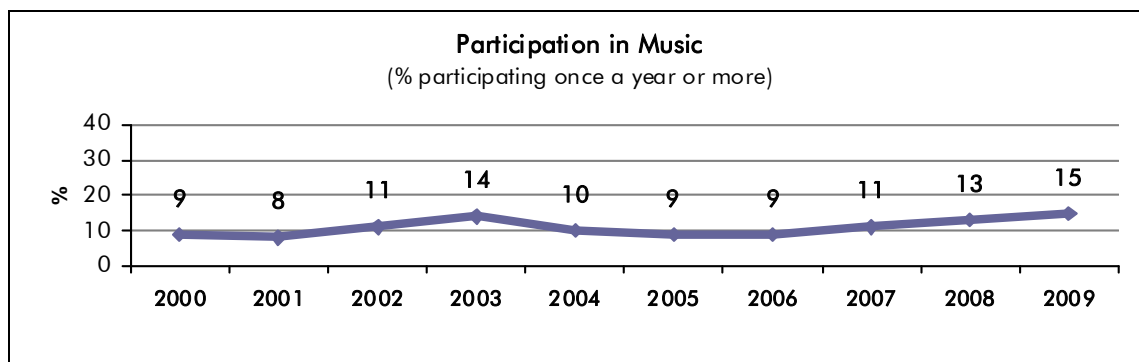
- Arts & Crafts is predominantly a female activity with 28% of women taking part once a year or more, compared with just 14% of men, although male attendance has increased by four percentage points since the previous year.
- There is relatively little variation by age in likelihood of participation in Arts and Crafts apart from those aged 25-34 being less likely than average to take part, at

16%. There has been an increase in participation since last year amongst 16-24s who are now the most likely age range to take part (up five percentage points to 24%) although they are closely followed by the other age ranges at 21/22%.

- Participation levels are similar amongst ABs, C1s and C2s; the only social grade grouping who are less likely than average to participate is the DE group (unskilled manual workers and non-working groups), at 16%.
- In terms of regional variations, adults in the Arts Council of Wales North Wales region are the most likely to say they take part in Visual Arts and Crafts activities, with 26% doing so once a year or more often (three percentage points higher than last year, which in itself had increased by six percentage points from the previous year). Those in the South are still the least likely at 19% although this does represent a six percentage point year-on-year increase. Participation in Mid & West Wales is largely unchanged at 21% (from 20% in 2008.)

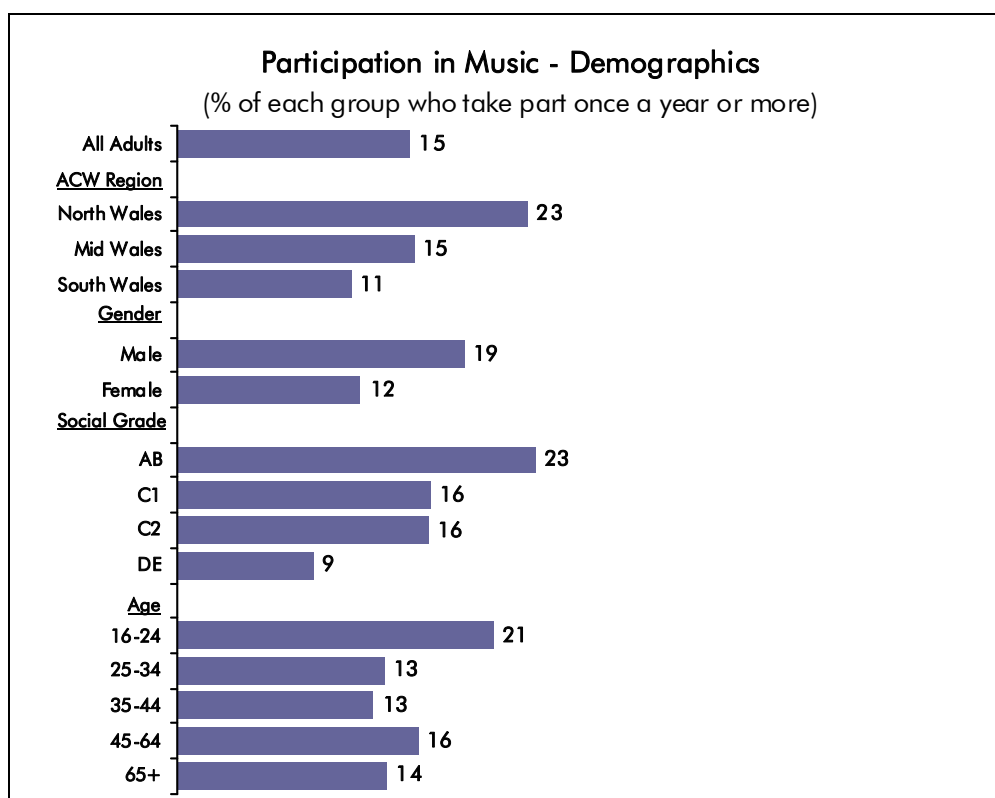
4.6 Music

Participation in Musical activities has been increasing steadily over the last five years, with 15% now saying they take part once a year or more often. This continues the two percentage point yearly increase seen every year since 2006, and keep Music as the second most participated in activity:



Base: All Adults (1,000)

Source: Wales Omnibus survey 2000-2009



Base: All Adults (1,000)

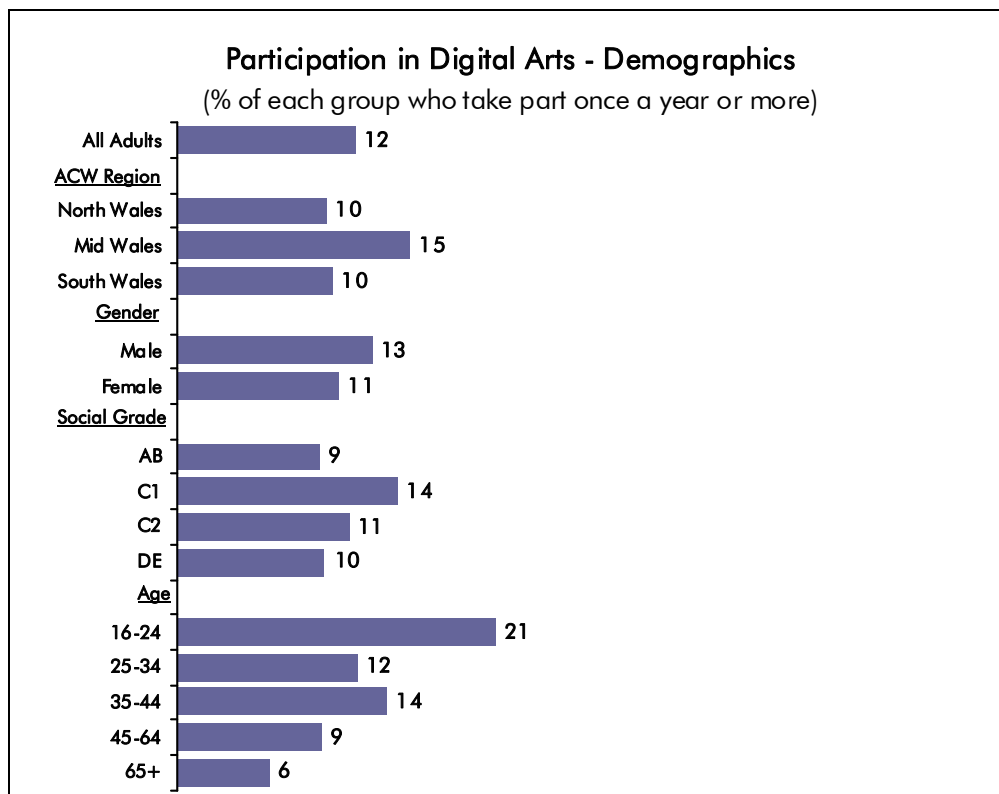
Source: Wales Omnibus survey 2009

- 16-24s are the most likely age group to take part in musical activities with 21% saying they do so once a year or more often. There was little difference between the other age ranges.
- Unlike many art forms, a six percentage point increase to 19% amongst men mean they are now more likely than women (12%) to take part in Music activities.
- ABs are also a lot more likely than average to take part, at 23% (up seven percentage points year-on-year).

- While in 2008 when there were no regional differences in terms of participation, in 2009 people living in North Wales are now much more likely to take part, at 23%, compared with 15% in Mid & West Wales and 11% in South Wales.

4.7 Digital Arts

A question about participation in Digital Arts was added to the survey in November 2009. This category was described to respondents as, 'creating and making arts using digital technology e.g. uploading, creating or remixing arts related content (e.g. on YouTube, Flickr etc.)'. 12% of adults across Wales said they take part in digital art activities once a year or more, making it the third most often participated in artistic activity.



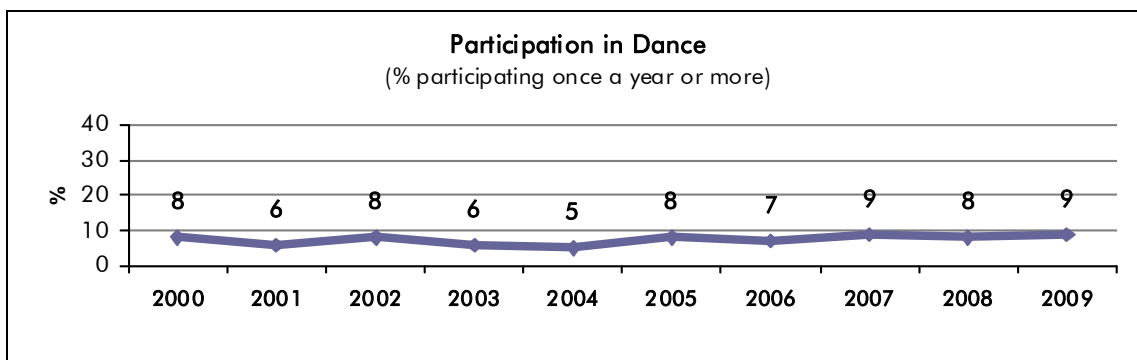
Base: All Adults (1,000)

Source: Wales Omnibus survey 2009

- Perhaps unsurprisingly, Digital Arts appeals most to younger adults – 21% of 16-24s taking part on a yearly-plus basis, compared with just 6% of those aged 65+. Other than age, there was little real variation by demographic group.
- Regionally, it seems that those in the Mid & West Wales region are slightly more inclined than elsewhere to participate in digital art activities (15%).

4.8 Dance

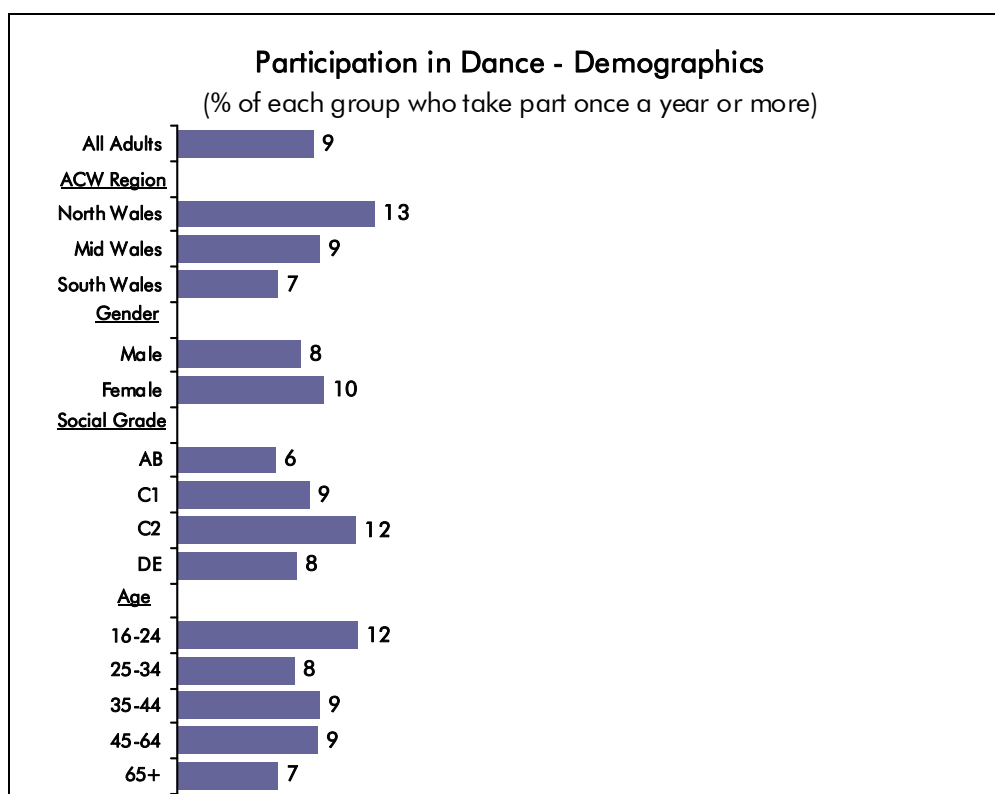
Participation in Dance remains fairly constant over time, with 9% now saying they participate in Dance activities once a year or more, slightly more than reported last year (8%):



Base: All Adults (1,000)

Source: Wales Omnibus survey 2000-2009

Women, 16-24s and those in North Wales are the demographic groups most likely to take part in Dance:



Base: All Adults (1,000)

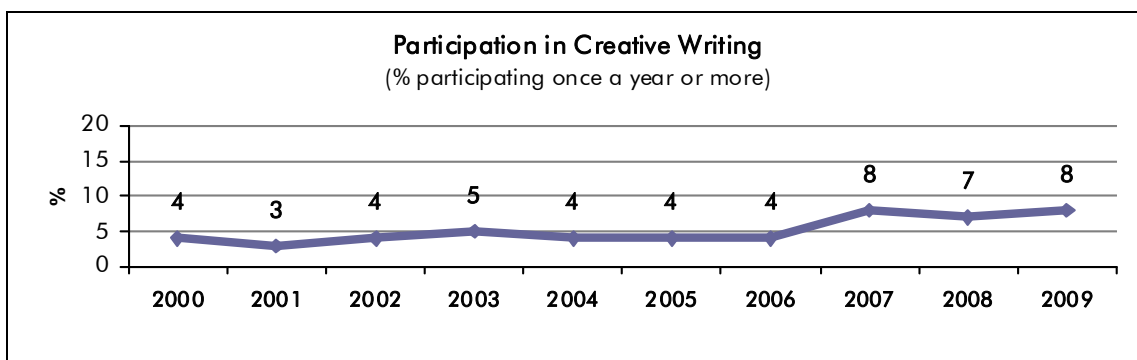
Source: Wales Omnibus survey 2009

- Women are more likely than men to participate in Dance activities at 10% vs. 8%, however participation amongst men has increased by three percentage points year-on-year, bringing them more in line with women's participation levels, which remain unchanged
- As also reported last year, adults in North Wales are more likely than average to take part in Dance activities, with 13% doing so in 2009.

- Dance is the most popular with the 16-24 age group (12%) and the least popular with the over 65s (7%).
- There is some variation in participation in dance by social grade with C2s the most likely to take part in 2009, at 12%, whilst ABs are the least likely, at 6%.

4.9 Creative Writing

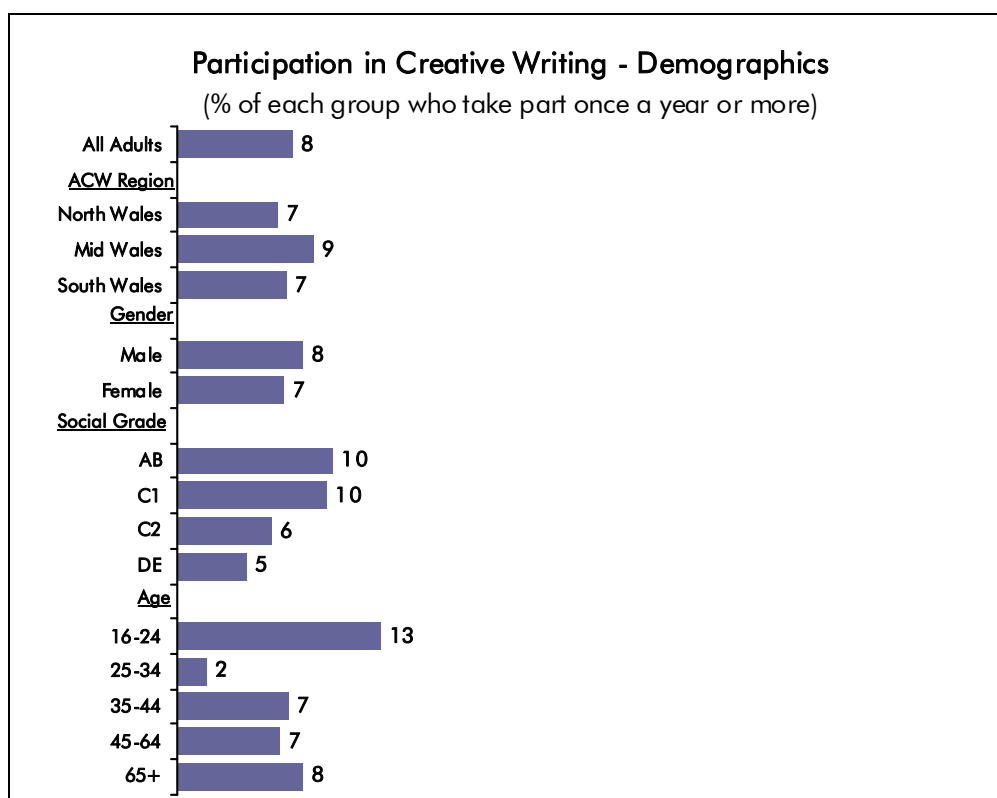
8% of people say they take part in Creative Writing, which is a small increase on last year, when 7% took part, and consolidates the small, but steady increase in participation in this activity over the past five years:



Base: All Adults (1,000)

Source: Wales Omnibus survey 2000-2009

Creative writing is more popular amongst ABC1s than C2s or DEs, with 10% of ABC1 participating in it, compared with 6% of C2s and only 5% of DEs:



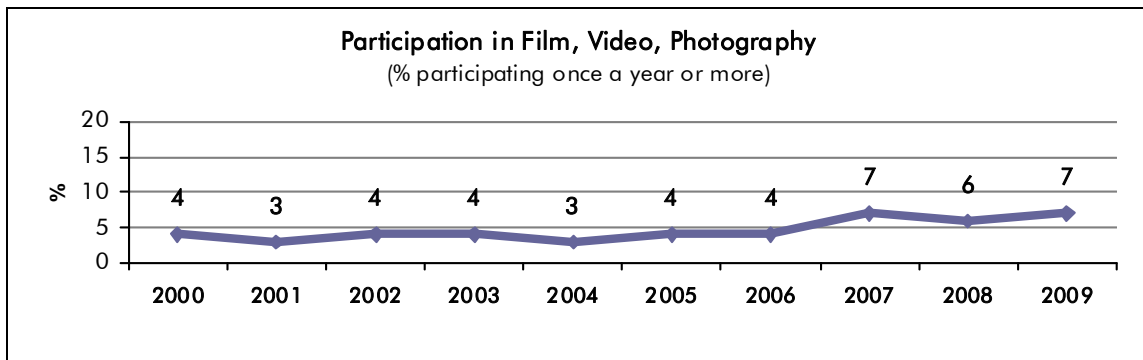
Base: All Adults (1,000)

Source: Wales Omnibus survey 2009

- There are virtually no differences by gender or region in the likelihood of taking part in Creative Writing.
- Age, however, seems to play more of a part, with 16-24s the most likely to take part, at 13%, but 25-34s the least likely at just 2% (down from 4% in 2008) . There is little variation amongst those aged 35+.

4.10 Film, Video and Photography

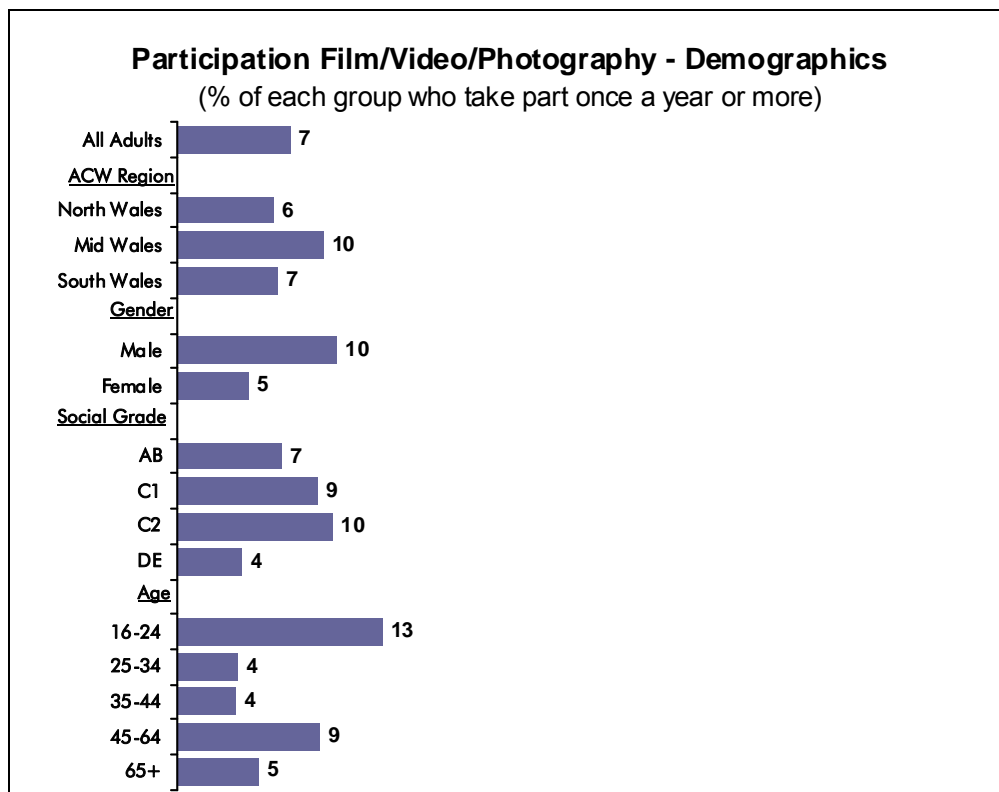
Participation in Film, Video and Photography is similar to last year, up one percentage point to 7%:



Base: All Adults (1,000)

Source: Wales Omnibus survey 2000-2009

Men (10%) are twice as likely as women (5%) to take part in Film, Video and Photography activities, and people aged 16-24 years (13%) are also much more likely than average to participate in these activities:



Base: All Adults (1,000)

Source: Wales Omnibus survey 2009

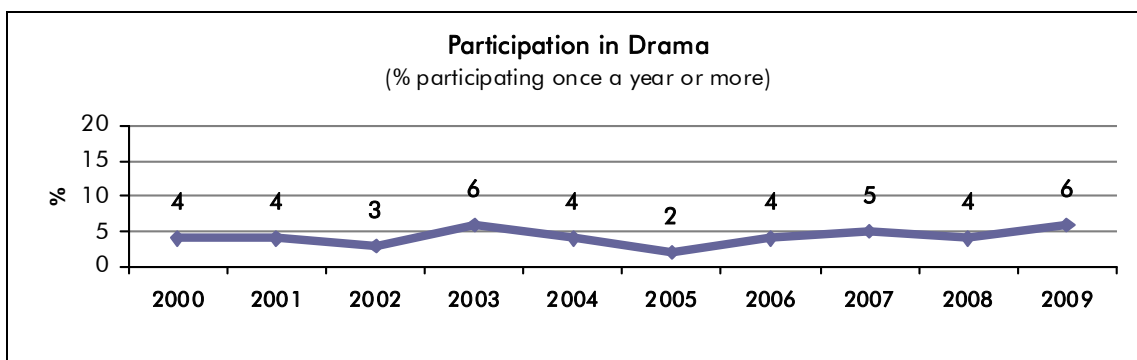
- The pattern by social grade is slightly mixed with C1s (9%) and C2s (10%) being the most likely to take part, and DEs somewhat less likely to participate, at 4%. ABs mirror the average participation level, at 7%.
- As mentioned above, age appears to have an affect on participation with 16-24 year olds much more likely to take part than any other age range, at 13% (up three percentage points year-on-year). Interestingly, 45-64s are the other age

group more likely than average to participate (9% - also up three percentage points since last year).

- In terms of region, those in Mid & West Wales are a little more likely than average to take part, at 10% (a four percentage point yearly increase).

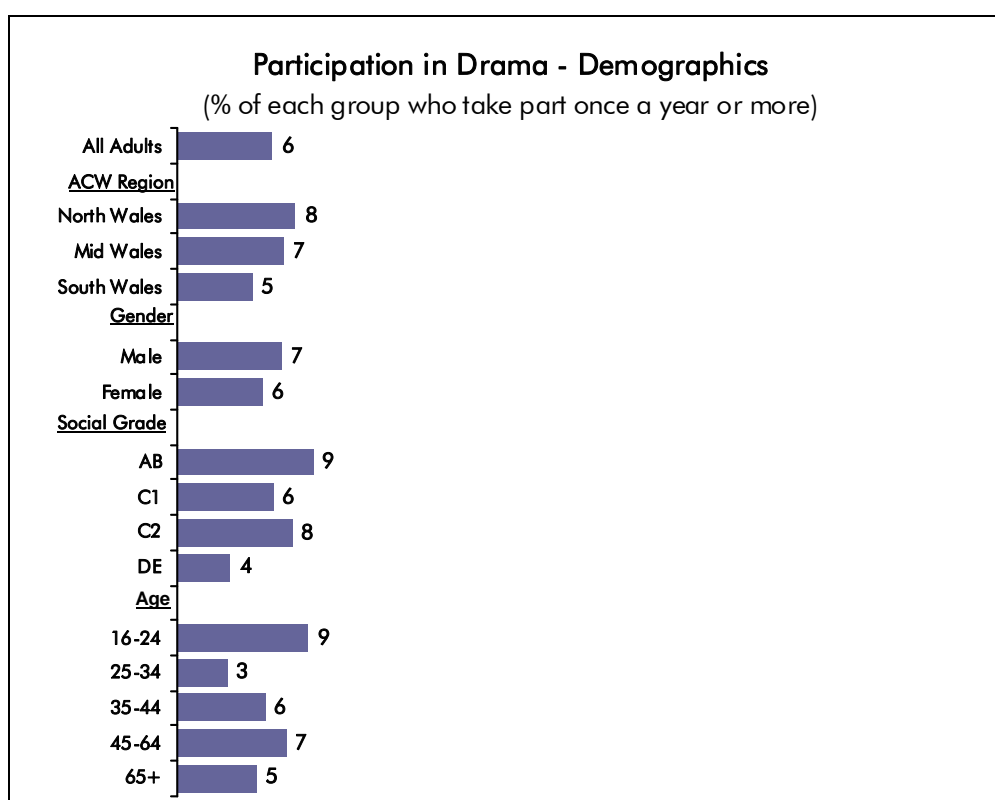
4.11 Drama

There has been a two percentage point increase in the proportion taking part in drama since last year, with 6% now taking part which represents the joint highest participation level (with 2003) recorded over the last ten years:



Base: All Adults (1,000)

Source: Wales Omnibus survey 2000-2009



Base: All Adults (1,000)

Source: Wales Omnibus survey 2009

- 16-24s and ABs are the most likely demographic groups to take part in drama, both at 9%.
- There is a slight regional skew in participation in drama this year, with those in the North a little more likely to take part at 8% (up from 4% in 2008) and those in the South less likely to do so, at 5% (the same as last year).
- There is little difference between men's (7%) and women's (6%) propensity to participate in drama.

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':

- | | | |
|---|---|---|
| <p>A "Upper Middle Class" - Higher managerial, administrative, professional e.g. Chief Executive, Company Director, Senior Civil Servant, Doctor, Judge, Barrister, Executive Accountant</p> | } | <p>ABC1s – professional, qualified and non-manual occupations</p> |
| <p>B "Middle Class" - Senior and intermediate managerial, administrative, professional e.g. Secondary School Teacher, Librarian, Computer Programmer, Probation Officer, Social Worker</p> | | |
| <p>C1 "Lower Middle Class" - Supervisory, clerical, junior managerial e.g. Clerical/Office Workers, Shop Floor Supervisor, Bank Clerk, Sales Person, Student</p> | | |
| <p>C2 "Skilled Working Class" - Skilled manual workers e.g. Electrician, Carpenter, Fire Fighter, Foreman</p> | } | <p>C2DEs – skilled, semi-skilled and unskilled manual workers and non-working people</p> |
| <p>D "Working Class" - Semi-skilled and unskilled manual workers e.g. Shop Worker, Assembly Line Worker, Refuse Collector, Messenger, Bar Staff</p> | | |
| <p>E Those wholly reliant on state benefits including the long-term unemployed and pensioners without private pensions. Casual labourers</p> | | |