
Communities and Culture Committee National Assembly for Wales

Inquiry into the accessibility of arts and cultural activities in Wales

SUBMISSION BY WALES MILLENNIUM CENTRE

As Wales' national centre for the performing arts we welcome this opportunity to provide evidence to the Committee's Inquiry.

In this submission we wish to demonstrate how we deliver against the strategic priority of the Welsh Assembly Government, as outlined in '*One Wales*,' which is to ensure that 'high-quality cultural experiences are available to all people, irrespective of where they live or their background.' This commitment by the Government mirrors exactly one of seven of our key strategic goals as set out in our Strategic Plan for 2010-2015, which is to be:

- **A place for people of all ages, background and experience to learn about and participate in the arts.**

The first part of this submission provides an overview of how the Centre has delivered against this goal, which has been fundamental to our vision since opening. The Centre is also home to eight creative organisations, namely Welsh National Opera, BBC National Orchestra of Wales, National Dance Company Wales, Academi, Hijinx Theatre, The Touch Trust, Tŷ Cerdd and Urdd Gobaith Cymru. It should be noted that this submission does not include evidence from each of the individual companies. However we understand that several of our resident companies, who are revenue clients of the Arts Council of Wales, will be submitting their own evidence to this Inquiry. Combined we are a powerful force in making the arts accessible to a very wide cross section of people of all ages and backgrounds across Wales.

The second part of our submission provides a commentary on some of those specific questions which the Committee has highlighted, which are relevant to Wales Millennium Centre.

INTRODUCTION

Wales Millennium Centre opened on November 26, 2004.

Since opening the Centre has

- welcomed some 8 million visitors
- sold two million tickets to theatre performances
- achieved an overall average audience of 75% (London average 68% - Society of London Theatres)
- staged 2,025 ticketed performances
- staged over 3,000 free performances
- generated £4 for every £1 of public subsidy
- attracted new attendees to arts events, with 45,000 first time bookers in 2009
- increased the audience from West Wales by 52% from 42,000 (2005) to 64,000 (2009)
- increased the audience from outside Wales by 64% from 31,000 (2005) to 51,000 (2009) with obvious benefits for tourism in Wales
- engaged residents from some of the most disadvantaged parts of Wales: 10% of ticket buyers from Communities First areas (2009)
- attracted 82,000 children to participate in cultural activities

The Centre is more than just a theatre. It is

- a cultural powerhouse which is accessible to all
- Wales' No 1 visitor attraction, attracting more than one million visitors every year, and 12th in the UK's league table of cultural attractions
- a significant economic driver, supporting 1,000 employees directly on site, making it one of the largest employers in Cardiff Bay

Economic impact

Several independent studies have been undertaken of the economic and social impact of Wales Millennium Centre-

- Professor James Foreman-Peck, of Cardiff Business School (former Treasury Economic Advisor), in a paper published in Spring 2010 said "It would be socially worthwhile subsidising the Wales Millennium Centre by up to £11 per visit" (based on 600,000 visitors).
- Dr Calvin Jones, of the Welsh Economic Research Unit at Cardiff University, has also analysed the economic and social impact of the Centre on Cardiff and Wales. His preliminary figures indicate that the Centre contributes £40m on an annual basis to the local economy.
- Using the Dominic Shellard model advocated by Arts Council of England and ACW, the Centre contributes £52m on annual basis to the local economy.
- Current level of public subsidy at the Centre is £2.45 per visitor (2009)

One Wales Agenda

Since 2007 the Centre has identified key priorities within WAG's **One Wales** progressive agenda for improving the quality of life of people in all of Wales' communities, from all walks of life, and especially the most vulnerable and disadvantaged. Through its activities, of which a selection are described in this document, the Centre has contributed to a number of those strategic priorities,

including

- SF01 A healthy population with a good quality of life
- SFO3 Our economy is strong and sustainable and provides good employment opportunities
- SF08 People are well educated for life
- SF09 Children have the best start in life
- SF 11 Communities are regenerated across Wales
- SF14 Wales is an energy efficient, low carbon and low waste society
- SF15 Welsh Language thrives
- SF16 Culture thrives in Wales
- SF17 Wales has a positive external reputation

Our Vision

From the outset Wales Millennium Centre's mission was to create, in a millennium landmark building, a focal point for the culture, identity and talents of Wales, and to provide a world class showcase for musicals, opera, dance, entertainment, education and exhibitions with long lasting benefits for the whole community. The vision is to be an internationally significant cultural landmark and centre for the performing arts, renowned for excellence, leadership and innovation. Attracting audiences and visitors from the whole of Wales and well beyond, the Centre also provides a creative home for Wales' leading arts and cultural organisations. In short, Wales Millennium Centre aims to 'bring the best of the world to Wales and to showcase the best of Wales to the world'.

Cultural Benefit of public subsidy

From the stability gained through the Welsh Assembly Government's Revenue Funding Agreement (RFA) of the last three years the Centre has consolidated its position, delivering tangible benefits for the people of Wales, best value and return on public investment. Over the last year the Centre has increased revenue earning activity, resulting in the 2009 grant subsidy of £3.7m representing 20% of total income. (Note: The Barbican and the Southbank Centre each receives public subsidy in excess of 50% of their income). Wales Millennium Centre generates an additional £4 of income for every £1 received in public subsidy. Most importantly this investment by Welsh Assembly Government has enabled the Centre to provide a programme of cultural activities to all people irrespective of age or background, or where they live. These activities include a diverse artistic programme, free performances, education and outreach and access provision for theatre attendees with particular needs and their companions.

Subject to the level of public subsidy provided by WAG the Centre, is poised to enter the next stage of its development.

A realistic level of subsidy is essential to

- consolidate the outstanding performance and achievements to date, whilst continuing to maintain standards of excellence
- balance artistic and commercial product to ensure that a high quality, innovative programme can be delivered which is also accessible
- ensure that the Centre can continue to "bring the best of the world to Wales and showcase the best of Wales to the world " through the strategies detailed in the 5 Year Plan

- continue to consolidate its position as a presenter of world class artistic productions

Performance to date and forecast performance for 2010/11 show that the Centre has been successful in achieving the KPI's contained in the current Revenue Funding Agreement with Welsh Assembly Government.

The Centre's Organisational Goals for the next 5 years:

1. A world class theatre and arts centre, promoting, creating and presenting the best international, national and local events across a wide arts spectrum.
2. A creative, high quality production base and home for the Centre's residents – Welsh National Opera, the BBC National Orchestra of Wales, Urdd Gobaith Cymru, Tŷ Cerdd, Academi, National Dance Company Wales, Hijinx Theatre Company and Touch Trust.
3. A dynamic cultural destination, attracting local, national and international visitors.
4. A sustainable, financially viable operation.
5. A first-rate customer experience.
6. A place for people of all ages, background and experience to learn about and participate in the arts.
7. A building and a working environment recognised for its architecture, its facilities as well as its cultural activity.

PROVIDING LIFELONG EXPERIENCES THROUGH THE ARTS

A key strategic goal, (No.6 above), is to be a place for people of all ages, backgrounds and experience to learn about and participate in the arts, from pre-school to Lifelong Learning, a place where low income is not a barrier to participation.

To achieve this goal the Centre

- stages the largest free performance programme of its kind in the UK, with over 500 performances per year
- nurtures Wales' future talent through a range of arts activity, including Curiad, its emerging artist programme, making provision for arts students to perform in public (2009: 3,846)
- welcomes young people from North, West and Mid Wales, who stay at the Urdd Centre (over 46,000 since 2005), including 100 young people every weekend to participate in Ffwrnais Awen, Cwmni Drama Cymraeg Caerdydd, a Welsh youth theatre programme
- works in some of Wales' most deprived areas, through Communities First, with an annual arts outreach programme, Project 21, in Barmouth,

Maesgeirchen, Bangor, Blaenau Ffestiniog, Townhill in Swansea, Merthyr Tydfil, Ystradgynlais and Adamsdown in Cardiff.

- operates an education programme linked to the National Curriculum, involving thousands of children every year (2009: over 16,000) and cultural tours for children and young people (2009: over 3,000)
- hosted 150,000 young people and their families at both the 2005 and 2009 Urdd National Eisteddfod
- runs a week long summer residential arts project – Bang – for 11 to 15 year olds in association with Welsh National Opera, National Dance Company Wales, Academi and the Urdd
- makes provision for toddlers with its weekly pre-school music workshops
- collaborates with **Age Cymru** to encourage participation by older people in the arts through the Gwanwyn Festival

As part of its objective to encourage more young people to participate in the arts, the Centre has

- established an annual weekend-long Urban Arts Festival, *Breakin' the Bay*, which has attracted young people from Communities First areas in Cardiff and from across the South Wales Valleys (10,000 over one weekend, 2009)
- created partnerships with youth groups in the community and at grass roots level across the region, including Valleys Kids and Arts and Kids projects in Wales.

CULTURAL DIVERSITY AND COMMUNITY ENGAGEMENT

Ein Milltir Sgwâr – Our Square Mile

- In line with Welsh Assembly Government's One Wales agenda and ACW's policies on diversity, the Centre celebrates Wales as a community of diverse cultures
- Located in **Butetown**, one of the UK's oldest multi-cultural communities, the Centre has been working with the local community for a number of years, helping regeneration through culture with its learning and participation programmes
- Through the Centre, a Community Forum has been established in Butetown, with a commitment to consult on a regular basis, through its Public Consultation Action Plan

The Centre hosts

- The Butetown Bay Jazz Festival, established in 2009, as a major community event with support from the Centre, and attracted nearly 9,000 visitors in 2010
- events to celebrate the heritage of the local black community as part of Black History Month every October, through the Black Voluntary Sector Network Wales
- multi-faith cultural celebrations representing diverse groups, including the local Sikh, Muslim, Hindu and Jewish community through the local Inter-Faith Council
- performances by children from all the local primary schools in Butetown, Grangetown, Tremorfa and Splott, resulting from outreach activity
- Diwali, Chinese New Year Celebrations and a range of other multi-cultural activities featuring world music e.g. Sikh and taiko drumming, koto music, steel bands as well as dance, e.g. India Dance Wales, salsa, etc, as part of

- its **Hanfod** programming strand
- remembrance events, both local and national, e.g. National Holocaust Memorial Day, Armed Forces Day

Croeso Cymreig

Fostering the Welsh language and culture is at the heart of the Centre's vision, and there is a commitment to the promotion of both in all its activities. Over the past three years the Centre's Welsh Language Scheme, introduced in 2006, has been embedded into every aspect of its operations. The revised scheme, approved in May 2010, is considered exemplary and far reaching by the Welsh Language Board and a model of best practice for others to follow.

Offering access to all

The Centre prides itself on its accessibility policies for all customers with special needs, whether they are clients of the Touch Trust, theatre attendees, performers or participants in arts activities, or general visitors.

Since opening the Centre has

- partnered with **Live Music Now**, the largest provider of live music to the UK's welfare, educational, justice and health sectors, to bring the best of live music to those who have limited access to conventional music-making.
- in association with Hijinx Theatre and Touch Trust, developed **Undod – Unity**, an annual inclusive arts festival, which forms part of Learning Disability Week
- regularly provided assisted performances, including BSL, captioned and audio described performances with touch tours
- introduced for 2010 guided tours for wheelchair users and visitors with visual impairment
- made provision for 19 wheelchair spaces in the Donald Gordon Theatre, which is more than most UK theatres, a dedicated car park and first class facilities for disabled visitors (to date we have welcomed 25,000 wheelchair users, plus 25,000 theatre companions who attend free of charge)

WORKING ACTIVELY WITH OUR RESIDENT PARTNERS

In our 5 Year Strategic Plan, the Centre is committed to collaborating with our resident partners. This was an essential component of the founding vision, namely to maximise the public benefit of nine creative organisations now working under the one roof.

Our resident partners

- share a creative vision and collaborate regularly with each other and with the Centre
- participate fully in the annual programming of the Glanfa Stage (2009: 168 performances) which provides regular free performances by a broad spectrum of artists, to an equally broad audience of all ages.
- contribute to workshops, free talks, exhibitions and visual displays
- participate in the Centre's free Open Days and Weekends to highlight their work. Next Open Weekend is scheduled for October 2-3.
- collaborate in education projects, such as Bang, a residential summer camp for young people

- sold 203,000 tickets for 187 performances in the Donald Gordon theatre since opening (WNO), generating high levels of returns for both WNO and the Centre
- developed an annual inclusive arts festival, Undod/Unity Festival (Hijinx Theatre and Touch Trust)
- have gone from strength to strength in terms of occupancy and participation (Urdd Gobaith Cymru) attracting children and young people from across Wales, particularly North, Mid and West regions.
- expanded their services through collaboration, partnership and increased floor space (Touch Trust)
- raised the bar in their artistic ambitions (National Dance Company Wales)
- presented more literary events in 2009 than at any time since the Centre opened (Academi)
- staged an ambitious Composers' Project involving 14,000 children and their teachers (Tŷ Cerdd)
- extended their education programme by working in partnership with the Centre (BBC National Orchestra of Wales)

Reaching out to Wales

As the national centre for the performing arts, the Centre has established artistic partnerships and collaborations across Wales, including

- a five year strategic partnership with Galeri in Caernarfon, which has led to successful joint programming e.g., Llyfr Mawr y Plant and Music Theatre Wales' bilingual production, Temptations, with plans in the pipeline for more co-productions
- professional development opportunities in the arts through its creative apprenticeship scheme in association with Creative & Cultural Skills, internships, placements, work experience and arts graduate recruitment
- Criw Cymru, a young people's urban arts programme, with Theatr Brycheiniog, Aberystwyth Arts Centre, and Swansea's Taliesin Arts Centre, as well as Galeri, the first project in Wales to achieve the London 2012 Inspire Mark
- a consortium of Welsh artistic company subscribers to Tessitura, the Centre's arts management software (for Ticketing, Fundraising, Customer Relationship Management, and Marketing), including The Royal Welsh College of Music and Drama, BBC National Orchestra of Wales and National Dance Company Wales
- an Incubator Project designed to provide a platform for artists and companies to make new Welsh work in partnership with the Centre. The outcome is the production of a public performance with a mixed audience of paying audience members as well as a specially invited audience of arts professionals and funding bodies. The Incubator Project is available to artists working in the Welsh or English languages in theatre, dance, circus, site-specific work, digital or online art forms.
- a Public Consultation Plan implemented in 2010 to consult regularly with the public at large. The Centre has recently embarked on a programme of consultation around Wales, targetting the public at large, as well as teachers, youth leaders, and performance groups, amateur and professional, across communities.

WALES MILLENNIUM CENTRE RESPONSES TO QUESTIONS

(**Please note:** all data in the following responses is extrapolated from the Centre's surveys of theatre bookers. It does **not** include data for education, free and participative arts activity, including the hundreds of free performances held every year, which forms an important component in the Centre's work to encourage accessibility, as evidenced in the first section of this submission)

RESPONSE TO QUESTION 2

How exactly are arts and cultural venues – including museums, libraries and archives – actively promoting access, attracting new audiences and encouraging participation in line with the One Wales commitment and the Arts Council's strategies?

Wales Millennium Centre, through its Audience Development, Learning and Participation and Marketing Strategies is actively working to promote access through a wide range of activity, both free and ticketed. (Some examples have already been highlighted above).

- For example the Centre hosts an annual urban arts festival, Breakin' the Bay, to attract young audiences to participate in the arts. 10,000 young people attended the festival over one weekend in 2009. Criw Cymru, the Centre's Cultural Olympiad project – the first in Wales to receive the 2012 Inspire Mark – is a collaboration with Theatr Brycheiniog in Brecon and Galeri in Caernarfon, again designed to encourage young people's participation. As previously highlighted in the introduction the Centre attracted new attendees to arts events, with 45,000 first time bookers in 2009 alone.
- The Centre's Learning and Participation Strategy is aimed at encouraging arts participation amongst all age groups from the very young to older people. The education programme targets children from toddlers with music classes to college students.
- To mark the Centre's 5th birthday last year the Centre introduced an ambitious outreach programme, Project 21, with 200 children from 7 schools in Communities First areas across Wales, from Maesgeirchen, Bangor to Maenofferen Blaenau Ffestiniog, Townhill in Swansea to Tremorfa in Cardiff. The Centre will continue to work with these children until they reach the age of 21. Their major artwork work with artist Ann Catrin Evans from Caernarfon is now on display at the Centre. The children, their teachers and families attended the unveiling. This year the children have been working with textiles artist Kevin Burgess, and their work will again be exhibited at the Centre.
- The Centre actively works with Age Cymru and the Gwanwyn Festival to encourage participation in the arts by older people, with regular Tea dances held throughout the year.
- Through the Centre's work with group organisers the Centre attracts large groups of older people, including groups from Residential and Care Homes,

especially from the South Wales Valleys. The Centre prides itself on the care it provides to these visitors.

- Wales Millennium Centre is a UK leader in terms of its accessibility policies, playing an active role on the Access UK group, and works closely with RNIB Cymru and RNID Cymru. The Centre's programme includes regular assisted performances - captioned and BSL interpreted performances for the hard of hearing, as well as a loop system, audio described performances and touch tours for the blind and visually impaired, including guided backstage tours. The Centre also assists other venues in South and West Wales with captioned performances by loaning its STAGETEXT equipment to others.
- Between 2009 and 2010, 63 of our main Donald Gordon Theatre performances have been Access Performances, (subtitle captioned, BSL aided or audio described). This is one performance in every seven in the main auditorium.
- Since 2009, 2.6% of all tickets sold at the Centre have been to patrons with disabilities. (Disabled and Companion ticket sales). This is 19,000 tickets with a total seat value of £677,000 in the last 18 months alone. The Centre provides free tickets to companions.

RESPONSE TO QUESTION 7

The Arts Council of Wales's 2008 Omnibus Survey suggested that people who were professionals, qualified or involved in non-manual work were more likely to attend an art event than those who were Skilled or semi-skilled manual workers, and non-working people. Is this consistent with your own experiences? Can you provide an explanation for this variation, and how can this variation be addressed?

Our own research shows that although people from more affluent backgrounds are more likely to engage with arts at the Centre, people from a diverse range of backgrounds make a contribution to the total arts attendance at Wales Millennium Centre.

This investigation uses the Acorn Socio-demographic profiling tool (<http://www.caci.co.uk/acorn-classification.aspx>). Through this investigation, we have used the Acorn socio-demographic profiling tool, which define the bottom two categories of affluence ('Moderate Means', 'Hard Pressed') as Blue-Collar households.

Since 2008, 25% of all theatre **bookers** to the Centre have been Blue-Collar. (Note a booker could book any number of tickets, including group tickets). 47% of bookers come from the top two Acorn Categories ('Wealthy Achievers', 'Urban Prosperity'). These two groups are characterised as being from traditional White Collar backgrounds. In the following table Category 4 and 5 combined make up our Blue Collar bookers.

Acorn Category	Households	Tickets	Revenue
1 Wealthy Achievers	53,338	241,578	£6,291,515
2 - Urban Prosperity	12,897	137,733	£1,722,634
3 - Comfortably Off	41,280	206,666	£5,165,097
4 - Moderate Means	23,190	132,396	£3,390,158
5 - Hard Pressed	11,165	58,627	£1,377,704

(Please note that this does not represent all purchases made at the Centre during this period, due to technical issues some bookers cannot be identified with a socio-demographic Acorn classification)

Since 2008, the Blue-Collar demographic categories have contributed:

- 34,355 Household groups coming to the Centre
- 191,023 tickets purchased
- £4.8 million ticket revenue

These figures show that although the higher affluence households are more likely to engage with arts at the Centre, a substantial level of engagement is also generated by other groups of individuals, traditionally under-represented in arts attendance.

Since 2008, 8% of all Blue Collar classed adults living within a 45 minute drive-time distance from Cardiff Bay have booked tickets at the Centre. On average each blue-collar classed individual has spent £140 on tickets.

Research shows levels of engagement for Blue Collar patrons at the Centre fluctuates depending on the product. Since 2008, 31% of bookers to Popular Music and 36% of bookers to Hip-Hop and Urban Arts productions have been from Blue Collar patrons.

Communities First

Between April 2008 and March 2010, there have been 85,492 tickets bought by people living in Communities First areas throughout Wales, generating £1,687,022 in ticket revenue.

In this period, 6% of all tickets bought in the Cardiff area were purchased by people living in Communities First areas.

Accessible to All

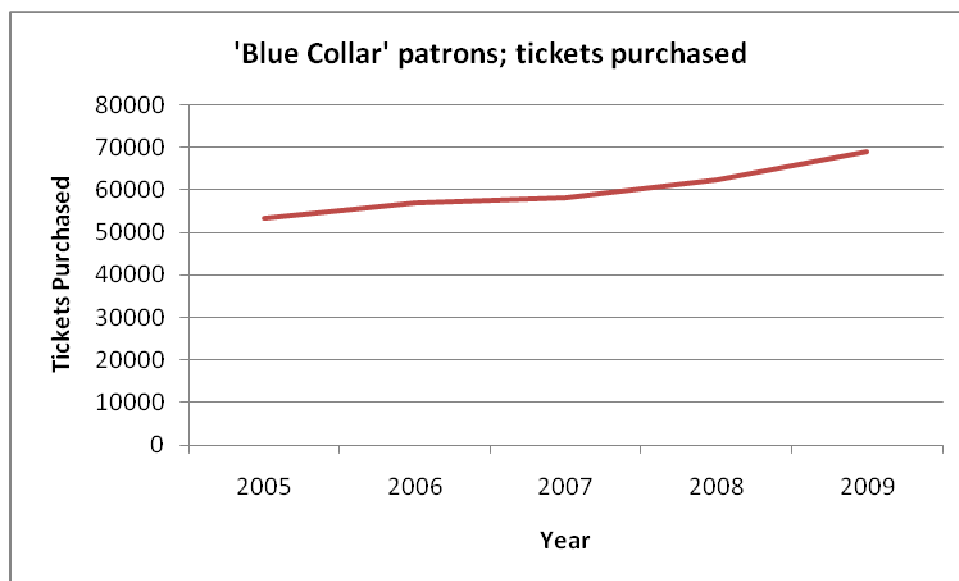
As part of the very large scale research project in summer 2010, we asked respondents of all ages to state by how much they agreed / disagreed with a series of statements regarding their cultural connection to the Centre.

84% of all respondents (2,810 people surveyed) either agreed or strongly agreed with the statement that Wales Millennium Centre is Open and Accessible to all.

Increasing Engagement at the Centre

Since the first full year of opening in 2005, the Centre has actively marketed to a broad demographic. Over the past five years there has been a trend for a steady increase in the level of engagement with “blue collar” individuals and the Centre.

The graph below shows that since 2005 there has been a year on year increase in the number of tickets purchased by people in the “blue-collar” demographic.



The number of blue-collar tickets purchased in 2009 was 30% higher than the number in 2005.

This trend of increased engagement is due to a number of factors, including better public awareness of the Centre in the five years since opening, better marketing intelligence over time and an evolving programme of diverse content to appeal to all. Every show marketing campaign at the Centre is designed with inclusion for all in mind, such as pricing decisions and campaign activity designed to communicate with all sections of society. This is also reflected in the appointment of a Community Liaison officer to directly work within these blue-collar areas and Community First contacts to increase levels of engagement with the Centre from these areas.

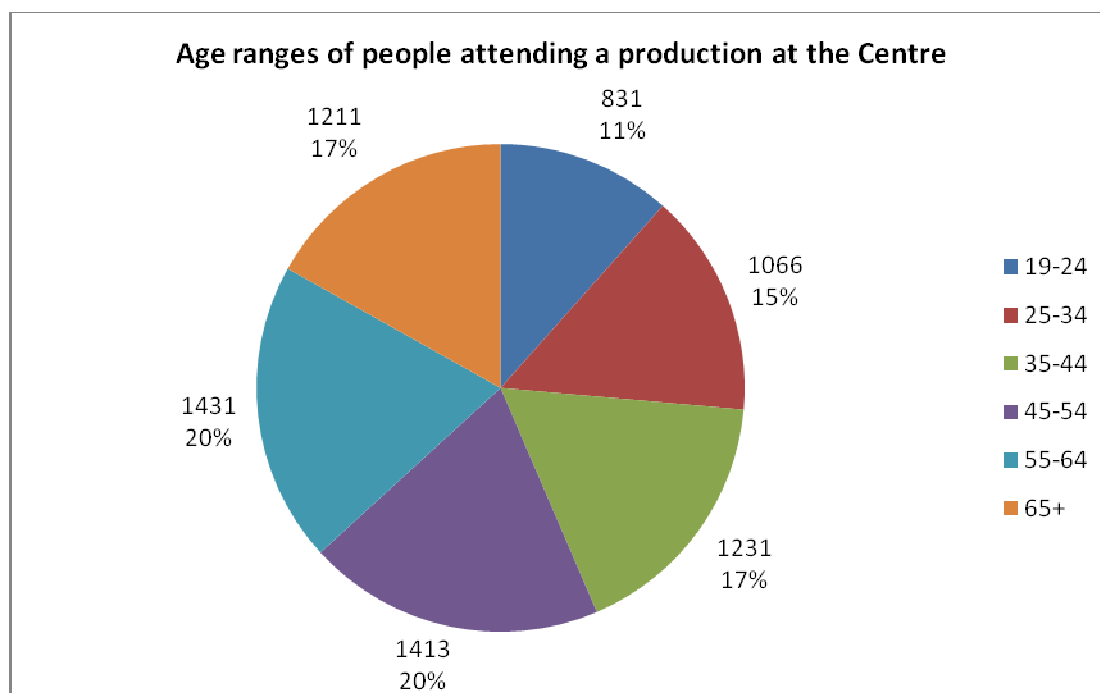
RESPONSE TO QUESTION 8

The Arts Council of Wales's 2008 Omnibus Survey suggested that younger adults were more likely to attend an arts event than older adults. Is this consistent with your own experiences? Can you provide an explanation for this variation, and how can this variation be addressed?

From our own and independent research, people from all age ranges engage with arts at Wales Millennium Centre. In summer 2010, Wales Millennium Centre undertook a large scale demographic customer research project, in part using a survey completed by over 3,600 respondents. The Centre also has touch-screen demographic surveys running in Front of House areas that collect 10,000 responses a year from visitors to the Centre

The results from these two comprehensive tools show that the Centre is likely to attract people of all ages to attend arts events. The graph below shows the age ranges of respondents to these questionnaires, showing a relatively even distribution of age ranges. (Please note that data on children and young people of school age

are not part of these two surveys. The first section of this document provides statistical information on children and young people’s participation.



This breakdown is consistent with the general population age statistics for South-east Wales in general; slightly higher numbers of people between 35 and 54 years old and slightly lower levels of people between 19 and 24 years old. This shows the arts product at the Centre attracts people of all ages equally.

Product

Research shows that **different** product at the Centre can attract a wide variety of different age groups. Research from the 2009 Hip-Hop festival “Breakin’ the Bay” shows 47% of attendees throughout the weekend were under the age of 24. On the other end of the scale, 46% of seats for the musical theatre production of ‘Laughter in the Rain’, which told the story of Neil Sedaka, were sold to over 60 year olds.

Therefore in our experience, our varied product can attract people from all age ranges – young and old sections of society will engage with the arts if the product is appropriate.

School Children

Since the start of 2009, 4,720 school children have taken part in an educational activity at the Centre as part of our Learning and Participation programmes. Since 2009, we have welcomed a further 6,678 school children on education visits to see theatre productions at the Centre.

Learning and Participation Testimonial

From attendee feedback, in the past year the age of participants in Learning and Participation events has ranged from 8 weeks old (pre-school music) to aged 90 (tea dance).

Age Groups and Connection to Wales Millennium Centre

As part of the very large scale research project in summer 2010, we asked respondents of all ages to state by how much they agreed / disagreed with a series of statements regarding their cultural connection to the Centre.

- 85% of all respondents agreed/strongly agreed that the Centre enriches the cultural landscape of Wales
- 86% of respondents agreed/strongly agreed that the Centre is an iconic, world class visitor experience
- 84% of respondents agreed/strongly agreed that the Centre is an inspirational home for the arts in Wales

Explanation

Diverse Programming and product and ticketing offers are designed to welcome all ages to the Centre. A Learning and Participation programme designed to provide activities for all ages; from pre-school music for three year olds to Tea-Dances attended by ninety year olds.

RESPONSE TO QUESTION 9

The Arts Council of Wales's 2008 Omnibus Survey suggested that females were more likely to attend an arts event than males. Is this consistent with your own experiences? Can you provide an explanation for this variation, and how can this variation be addressed?

Research from the Centre shows that females are either more likely to attend arts events at the Centre than males, or that females are more likely to book tickets for the arts and answer surveys saying that they engage with the Centre

Using the two tools previously mentioned (large scale summer 2010 ticket purchaser questionnaire, touch screen permanent questionnaire), slightly more females than males are likely to engage with the Centre.

The table below demonstrates this:

Gender	Wales Millennium Centre	South East Wales Benchmark (90 min Drivetime to Cardiff Bay)	Difference
Female	55.2%	52.1%	3.13%
Male	44.8%	47.9%	-3.13%

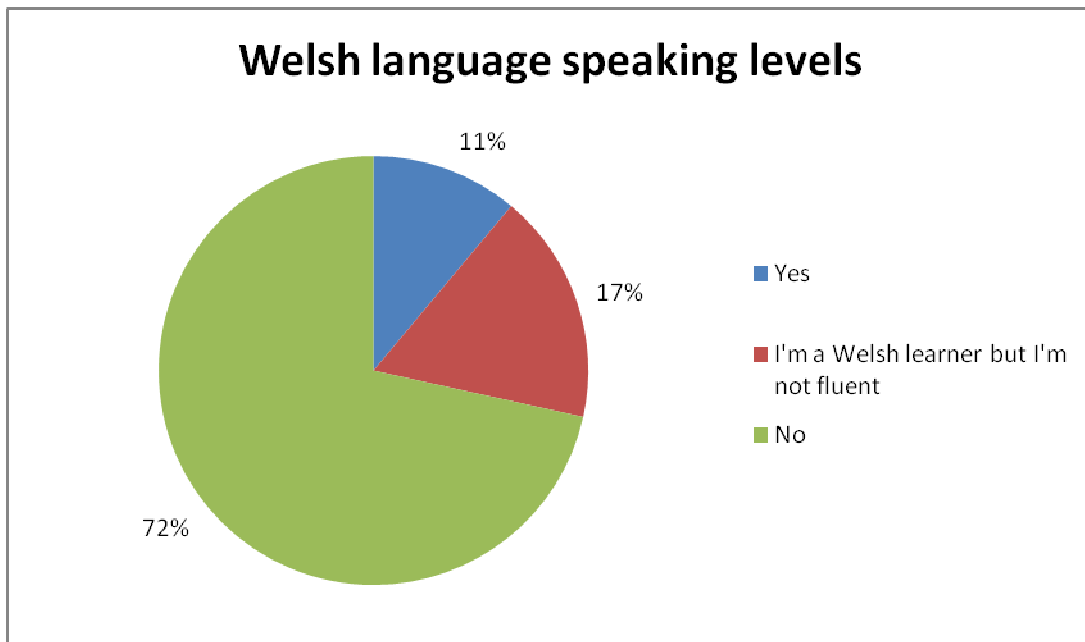
However it should be noted that the 3% swing is not conclusive proof that more females than males engage with arts at the Centre and that other caveats such as females being more likely to be the ticket booker of a mixed-sex party or females being more likely to admit to arts engagement could be a factor in this swing.

RESPONSE TO QUESTION 10

The Arts Council of Wales's 2008 Omnibus Survey suggested that Welsh Language Speakers were more likely to directly participate in the arts than non Welsh Language Speakers. Is this consistent with your own experiences? Can you provide an explanation for this variation, and how can this variation be addressed?

Research undertaken by ourselves shows that Welsh language speakers are more likely than non-Welsh speakers to engage with arts at the Centre.

From the large scale ticket booker questionnaire (Summer 2010), the following graph shows the spoken Welsh language ability of the Centre's attendees:



The chart shows that 28% of attendees to the Centre can speak Welsh to any level (whether learning or fluent). Across South Wales, approximately 17% of people are Welsh speakers. Attendance by Welsh speakers and learners is higher than average. (<http://www.statswales.wales.gov.uk/TableViewer/tableView.aspx?ReportId=5502>)

1. Attendance by Welsh speakers and learners is higher than average. A caveat here is that although 28% of respondents indicate at least some knowledge of Welsh, the survey was bilingual and around 4.5% of all surveys were completed in Welsh. This indicates although there are higher than average levels of Welsh speakers engaging with the Centre, a significant percentage of these still prefer to converse in English.
2. Therefore our latest research does indicate that Welsh Language speakers are more likely to directly participate in the arts than non-Welsh speakers.

At point of sale, we ask all bookers if they are Welsh Speakers. 9.5% of respondents indicated that they do speak Welsh, although as a yes/no answer we cannot ascertain their degree of fluency with the language. We believe that if people are not fluent Welsh speakers, they would indicate that they are not Welsh speakers. Therefore these figures closely match our survey figures above.

The Centre actively seeks Welsh language productions in all its performance spaces. In 2008 the first Welsh language professional musical, *Llyfr Mawr y Plant*, was held on the Donald Gordon Stage. Theatr Genedlaethol is an associate partner of the Centre and staged *Y Gofalwr* in the Weston Studio in the spring and its *Gwlad yr Addewid* forms part of the theatre's autumn season. The Centre is working with groups of Welsh learners across South and West Wales through the University of Glamorgan and Mentrau Iaith to build capacity and encourage their participation in Welsh language productions. Welsh language children's shows are also popular at the Centre. In addition we are working with coach companies and group organisers in North, Mid and West Wales to increase audiences from the Welsh heartlands.

Ethnicity

The Centre attracts higher level of arts engagement from ethnic minorities. In the large scale customer survey of summer 2010, 6% of previous attendees at the Centre described themselves as coming from an ethnic minority. According to census data, within a 45 minute drive-time of the Centre, 3.3% of people are from an ethnic minority.

We believe that parts of our programme such as Cape Town Opera's *Porgy and Bess*, Alvin Ailey Dance Theater and the *Breakin' the Bay* Hip-Hop events significantly increase the level of engagement with the Centre from BME groups.

A demographic survey carried out with the *Breakin' the Bay* participants in 2009 indicated 36% of total attendees at the weekend-long event were from an ethnic minority (BME) group. This shows that in our experience, the key driving factor for attracting ethnic minorities to the arts is the product and there is no natural barrier for this group to engage with the Centre. Butetown Bay Jazz is a partnership with the local community in the Bay, designed to bring live jazz back into the Bay. It is also aimed at increasing capacity and encouraging participation in Butetown's jazz heritage amongst young people in the community.