

# Arts Attendance in Ireland 2012-2013

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# Report contents

<b>Introduction &amp; highlights</b> .....	2
What's the background to this research and what does this report cover?.....	3
What does Census 2011 tell us about Irish people?.....	4
What are the key findings from this research? .....	5
<b>Attendance in each artform</b> .....	6
What's covered in this chapter? .....	7
How many people attend each artform? .....	8
How often do people attend? .....	9
What do we know about attenders to each artform? .....	10
How does attendance to each artform vary across the regions? .....	12
How does the age profile of attenders compare with that of the general population? .....	15
<b>Attenders in each region</b> .....	19
What's covered in this chapter? .....	20
What do we know about attenders in each region? .....	21
What newspapers and other media are used by attenders in the regions? .....	27
Dublin attenders.....	28
Leinster (excl. Dublin) attenders.....	32
Munster attenders.....	36
Connaught/Ulster attenders.....	40
<b>Arts attenders and the Internet</b> .....	45
Some information about arts attenders and the Internet.....	46
<b>Appendices</b> .....	48

# Introduction and highlights

# What's the background to this research and what does this report cover?

Arts Audiences is an initiative of The Arts Council and Temple Bar Cultural Trust, looking at the relationship of the audience to the arts in Ireland. One of the things we do is to try to ensure that we understand the size, scope and profile of audiences in Ireland.

Each year, Arts Audiences publishes information drawn from the Target Group Index (TGI) research. The report is published with two main aims:

- To provide an overall picture of audiences for the arts in Ireland and to provide arts organisations with figures for attendance at different artforms. This is of value to all arts organisations and it assists the public bodies involved in making a case for the arts.
- To provide audience insights for arts organisations to help with marketing decisions.

*Arts attendance in the TGI survey is defined as attendance at: any performance in a theatre (which could be a show in any form, for instance comedy or an amateur performance), plays, classical music concerts, folk concerts, jazz concerts, ballet, opera, contemporary dance, art galleries and art exhibitions.*

As always, this report outlines some key facts and findings about arts attendance in Ireland in two main sections.

- **Attendance by artform, and information about these attenders**
- **Regional audiences for the arts and some information about their behaviour and how to market to them**

Work was done in the summer of 2010 to compare and link together the results with other rich sources of information about the arts, such as "The Public and the Arts" (2006) and the Theatre Forum Benchmarking Report. The findings support each other and help us build up a picture of arts attendance.

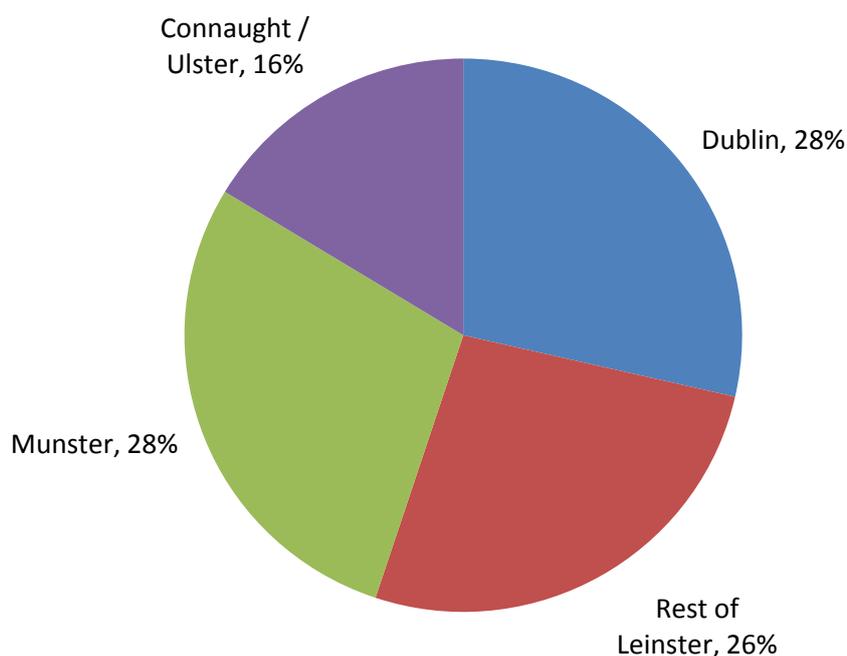
Data for this year's report was gathered in two waves – October to December 2012 and January to April 2013. This period is referred to throughout this report as 2013. Previous years are referred to in the same way.

We welcome comment on the report, and most particularly suggestions from arts organisations about further information that they would like to see. You can contact us directly through [www.artsaudiences.ie](http://www.artsaudiences.ie).

# What does new TGI ROI 2013 data tell us about Irish people?

- The total adult population of the Republic of Ireland is 3.6 million.
- Of these, 51% were women and 49% were men.
- 41% were classified as being in the social classification ABC1.
- A slightly higher percentage of the population live in Dublin than at the last census; and a slightly lower percentage in the region defined as Rest of Leinster and Munster.<sup>1</sup>

*Chart 1: Population of the regions*



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<sup>1</sup> Census 2011

# What are the key findings from this research?

- Arts attendance is holding steady year on year, despite the economic circumstances. **2 million adults report that they attend at the arts, unchanged** from the 2011 and 2012 reports.
- **1.5 million adults** report that they attend at the arts at least once a year, and this figure has remained unchanged since 2010. This stability contrast with reported attendance in the UK, which has seen slight falls year on year since 2008, but may be showing signs of stabilising.
- Arts attendance has increased at every artform (except opera) in 2012-2013. This ranges from an increase of 3.5% (art galleries and exhibitions) to 31% (jazz).
- Attendances at plays, and at art galleries, remain the two largest activities numerically.
- 0.9 million adults report that they attended music gigs in stadiums or arenas, compared to 1.5 million who attended the arts.

# Attendance in each artform

# What's covered in this chapter?

In the case of each artform, arts attenders have been defined as those who report that they attend at the artform once a year or more often( i.e. the figures include those who report attendance once a month, 2-3 times a year etc.).

- **A detailed look at attenders by artform, (covering social class, gender and region).**
- **A detailed look at the age profile of attenders in each artform**

An arts organisation can use this artform specific data to profile their potential audience. If the organisation can profile their own audience then an analysis of the gaps can be carried out. Media consumption information in the next section will help organisations to market directly to those potential attenders.

# How many people attend at each artform?

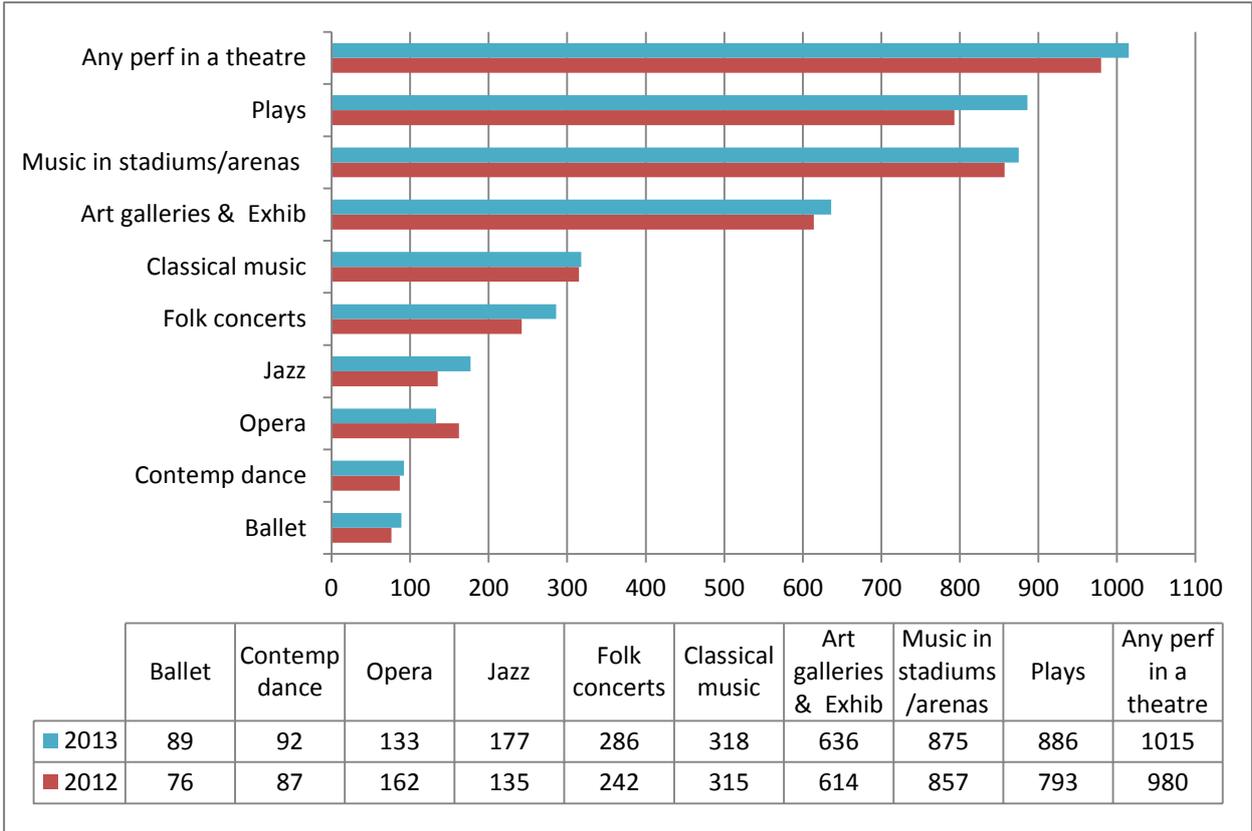
This chart compares attendance at each artform covered by TGI in 2012 and 2013.

**In 2013, attendance increased at every artform with the exception of opera.**

**Plays saw by far the largest growth in attendance, growing from 793,000 to 886,000 or a growth of almost 12%.**

**Large percentage increases in other artforms, such as ballet could be attributed to one off factors.**

**Chart 2: Number of attenders by artform (thousands), 2012 and 2013**



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# How often do people attend?

Frequency of attendance remains a key issue, with large differences between those who report that they go once a year at least and those who go less often (see the table below). However, there are some positive indications in certain artforms (see chart below). This continues to suggest that the arts has an opportunity to convert those who attend infrequently (i.e. less often than once a year) into more frequent attenders.

Infrequent attenders represent an opportunity to increase audiences in all of these artforms.

The number of people who say they attend less often than once a year has gone down.

Frequency of attendance has increased in ballet, classical music, contemporary dance and folk concerts.

Chart 3: Frequency of attendance by artform, 2012 and 2013

The number of Irish people who attend less often than once a year		
	2012	2013
Any performance in a theatre	552,000	<b>504,000</b>
Art Galleries or art exhibitions	382,000	<b>356,000</b>
Ballet	172,000	186,000
Classical music concerts/recitals	287,000	307,000
Contemporary Dance	188,000	207,000
Folk Concerts	288,000	307,000
Jazz concerts	240,000	<b>218,000</b>
Opera	171,000	227,000
Plays	599,000	<b>511,000</b>

# What do we know about attenders to each artform?

## Attenders by gender

Different artforms have markedly different audiences when looking at the percentages of men and women who attend. This information adds to our overall knowledge about arts attenders and how to market to them.

Jazz has the lowest percentage of female attenders and ballet and contemporary dance the highest.

More women attended folk concerts in 2013.

Chart 4: Percentage of total regular attenders by gender, 2012 and 2013

	2012		2013	
	Female %	Male %	Female %	Male %
Population	51	49	51	49
Folk concerts	43	57	44	56
Jazz	51	49	45	55
Art galleries & Exhib	57	43	55	45
Plays	58	42	57	43
Any perf in a theatre	59	41	59	41
Classical music	60	40	60	40
Opera	69	31	63	37
Contemporary dance	66	34	69	31
Ballet	71	29	78	22

## Attenders by social class<sup>2</sup>

Every artform except jazz is predominantly ABC1.

Classical music and jazz attendance have become progressively less ABC1 year on year since 2011.

Perhaps unsurprisingly, opera attracts the highest proportion of ABC1 individuals of any artform.

Chart 5: Percentage of regular attenders by social class, 2012 and 2013

Percentage who were ABC1:	2011	2012	2013
Population	40	40	41
Contemporary dance	49	46	50
Folk concerts	51	47	47
Any performance in a theatre	55	49	52
Jazz	60	49	48
Ballet	56	50	60
Plays	54	51	51
Art galleries & exhibitions	63	54	55
Opera	64	54	64
Classical music	63	57	55

Social grade is based on information given by the respondent regarding the occupation of the household's Chief Income Earner. Occupations which fall into ABC1 are: A: Higher managerial, administrative or professional, B: Higher managerial, administrative or professional, C1: Supervisory or clerical, and junior managerial, administrative and professional.

# How does attendance to each artform vary across the regions?

# Regional population attending each artform

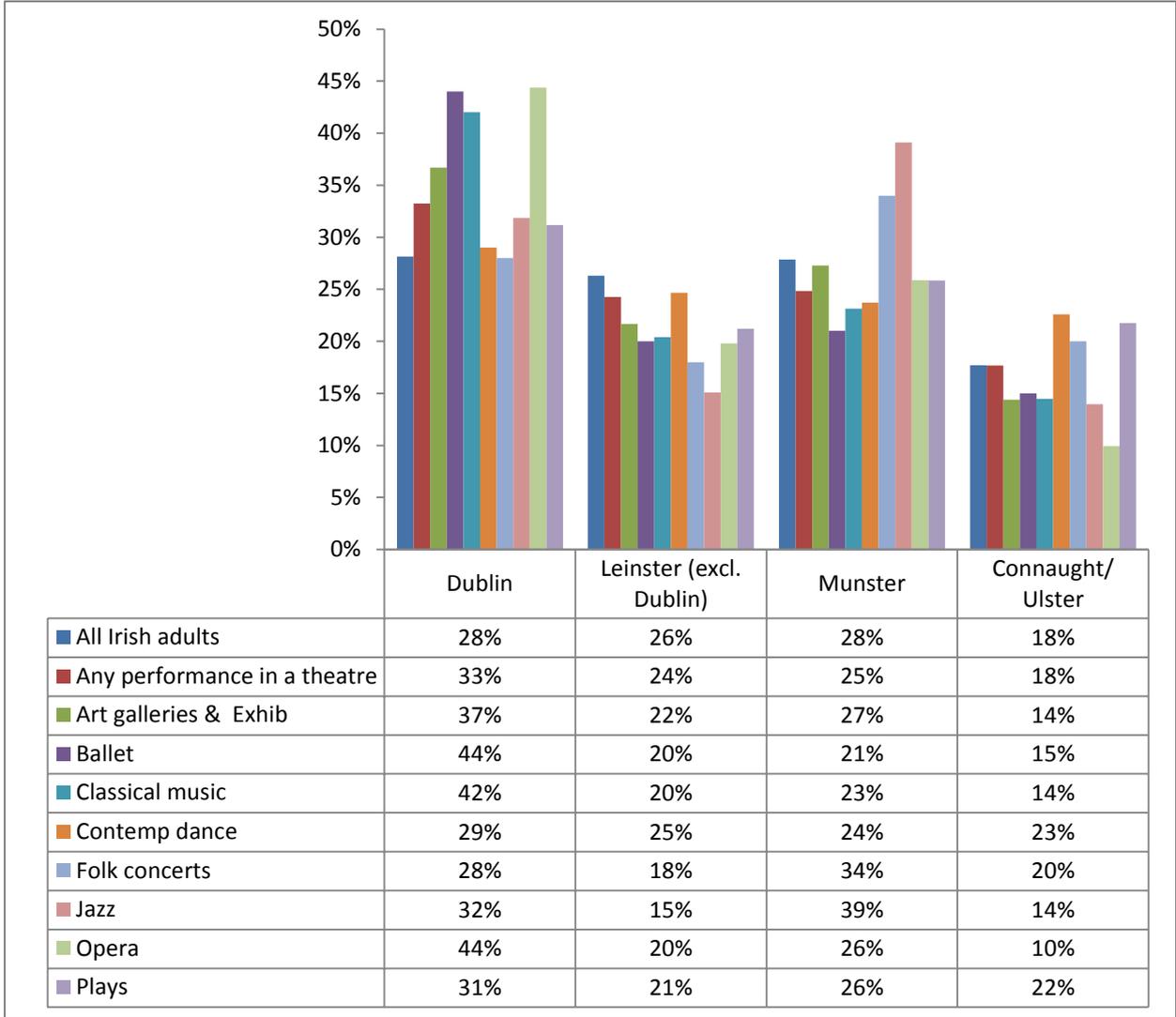
These statistics about regional attendance have to be read in the knowledge that provision of artforms varies across regions too; e.g. attendance at ballet in Connaught /Ulster will depend on how much ballet is on offer in that region as well as other factors.

Dublin tends to have more arts attenders than other regions- this is probably explained by higher levels of provision in Dublin.

44% of opera attenders are in Dublin, compared with 28% of the population.

Nearly 40% of all jazz attenders are in Munster, compared to only 28% of the population.

Chart 6: Percentage of regular attenders to each artform by region, 2013



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The table below shows the numbers in thousands:

*Chart 7: Thousands of regular attenders to each artform by region, 2013*

<i>Numbers in thousands (000s)</i>	Dublin	Leinster (excl. Dublin)	Munster	Connaught / Ulster	Total
Any performance in a theatre	337	246	252	179	1,015
Art galleries & exhibitions	233	138	173	91	636
Ballet	39	18	19	13	89
Classical music	134	65	74	46	318
Contemporary dance	27	23	22	21	92
Folk concerts	81	50	96	59	286
Jazz	57	27	69	25	177
Opera	59	26	35	13	133
Plays	276	188	229	193	886
<i>All Irish adults</i>	<i>1,012</i>	<i>945</i>	<i>1,001</i>	<i>636</i>	<i>3,594</i>

# How does the age profile of attenders compare with that of the general population?

There are marked differences in the age profiles of audiences at different artforms; this has always been the case and is also the case in the UK, for example.

Information from the 2011 Census shows that there is a higher proportion of people in Ireland in the 25-34 age group; Ireland saw a big increase in birth rates in the 1980's. 20% of the population is in this age group. However, 15-24 year olds represent the smallest age group overall, comprising only 11% of arts attenders.

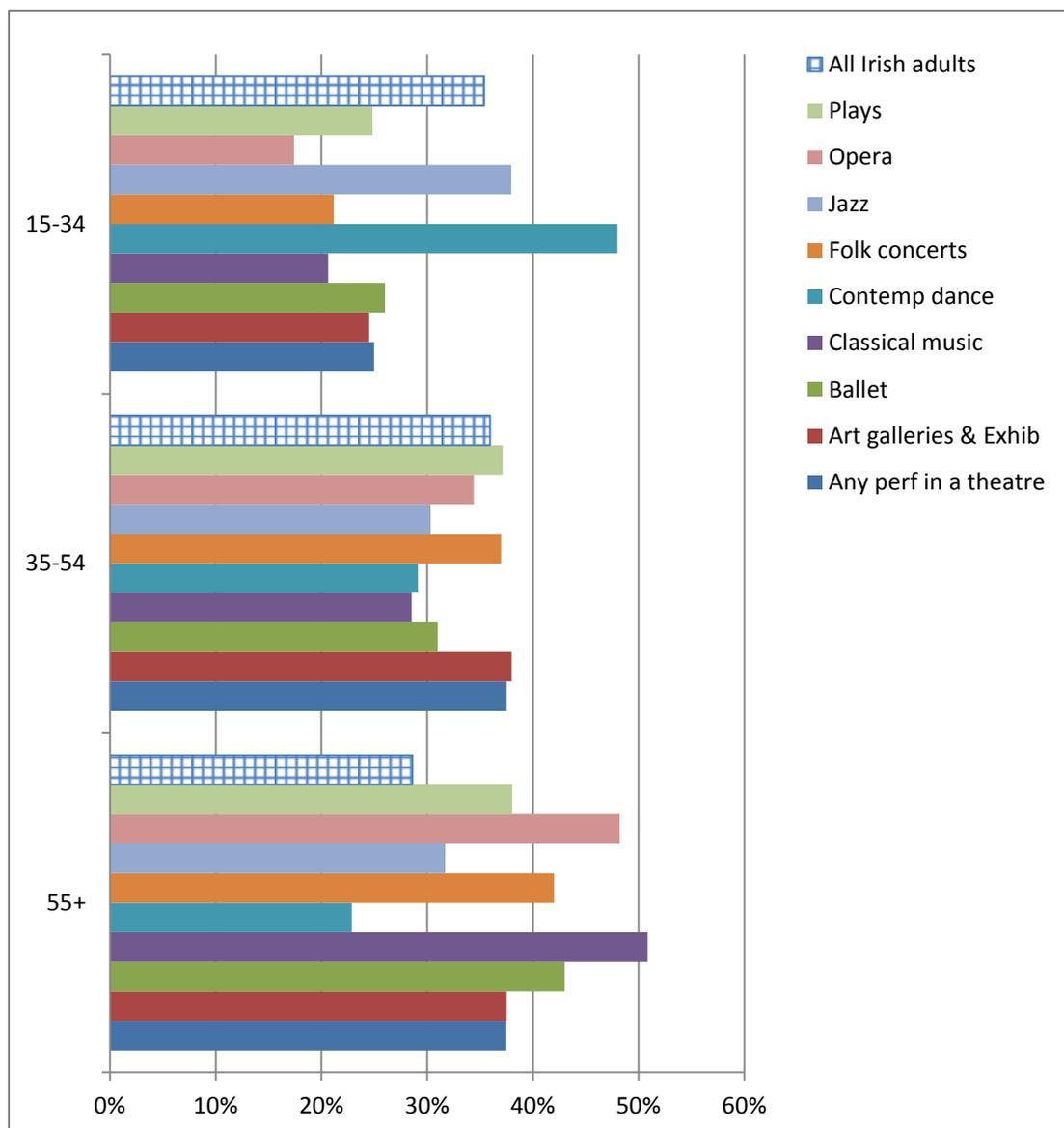
## Artforms which reflect the age profile of the general population

In general, fewer young people attend the arts, in comparison to their overall numbers in the population

People over 55 attend at almost all artforms more than their numbers in the population.

Between 35 and 55, generally speaking, artform attendance reflects the age profile of all adults.

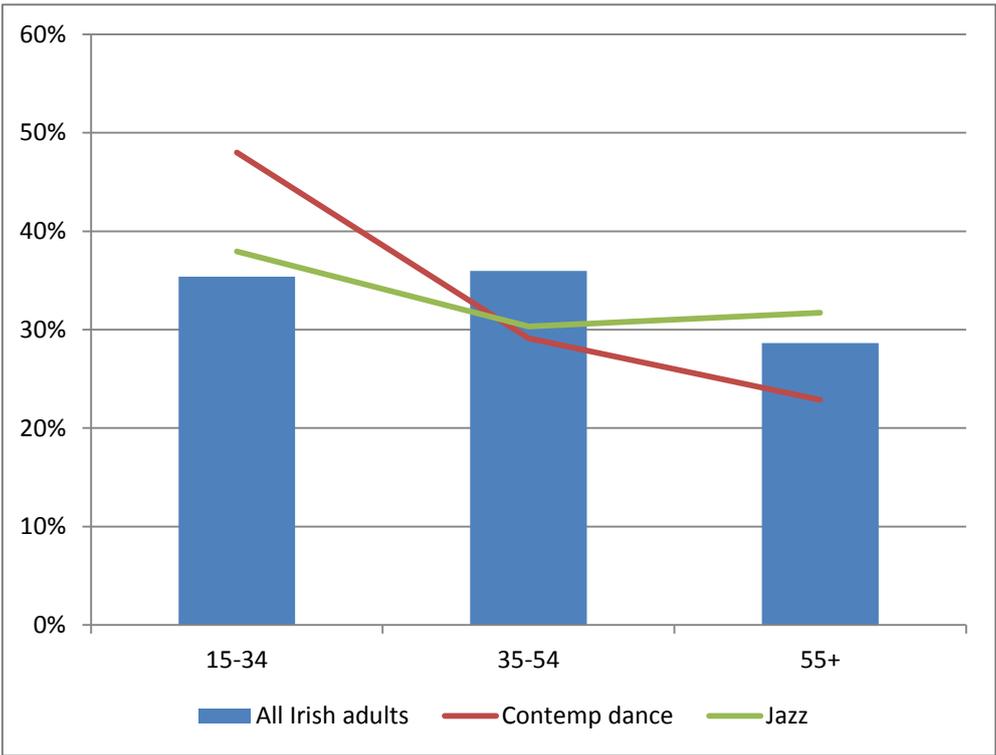
Chart 8: Percentage of regular attenders in each category compared to all Irish adults, 2013



# Artforms which have a younger age profile than the general population

Contemporary dance and jazz are the only artforms where young attenders show a marked difference in attendance.

Chart 9: Percentage of regular attenders in each category compared to all Irish adults: contemporary dance and jazz, 2013



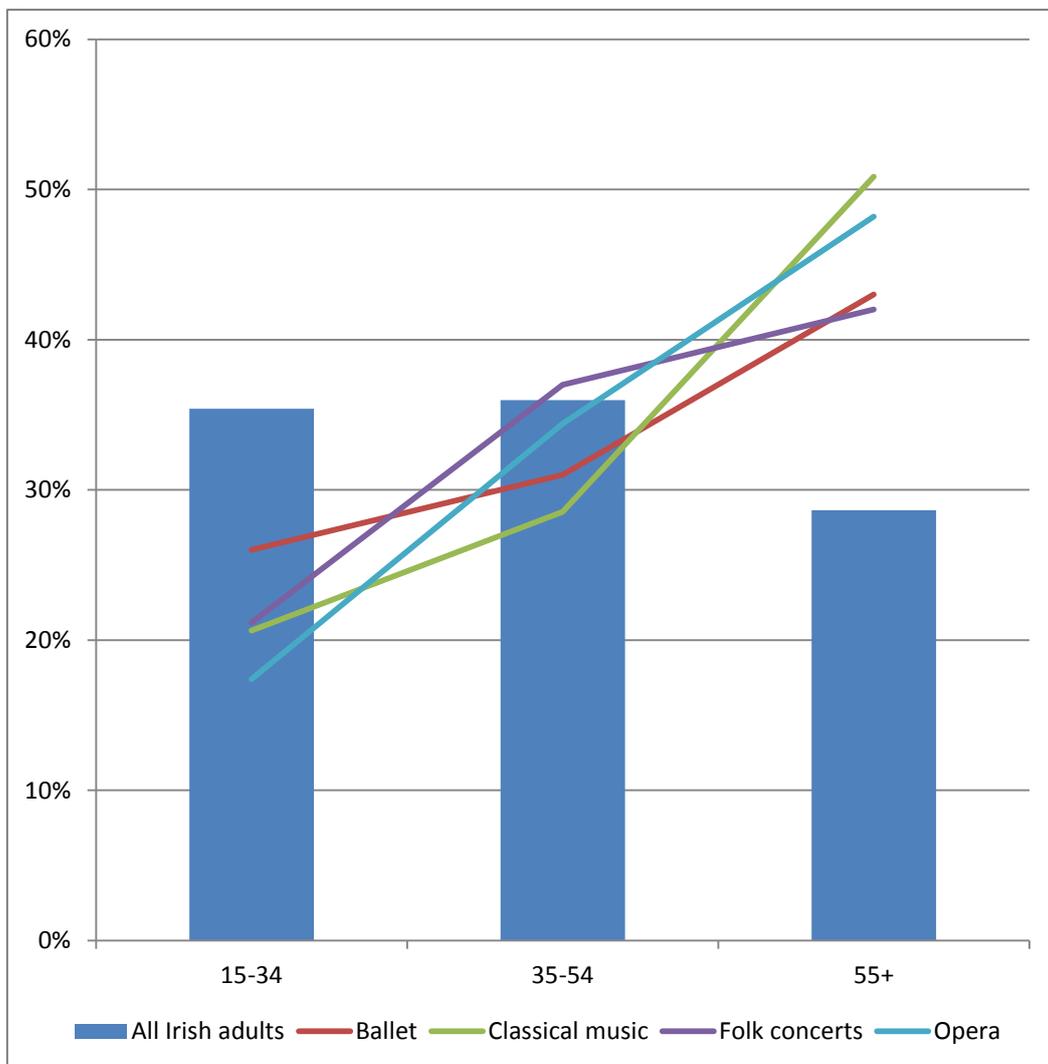
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## Artforms which have an older age profile than the general population

Some artforms have a markedly older age profile than the general population.

Ballet attenders tend to be younger than opera or classical music attenders, but the artform still has an older age profile.

*Chart 10: Percentage of regular attenders in each category compared to all Irish adults, ballet, classical music, folk concerts and opera, 2013*



# Attendees in each region

# What's covered in this chapter?

We define regular arts attenders as those who report that they attend at the artform once a year, or more often than that.

- **A more detailed look at attenders in each region, examining their age, social class, gender, employment status, internet usage, responsiveness to direct mail and online ticket purchasing.**
- **A look at how arts attenders in each region consume media, to help arts organisations make more targeted marketing decisions.**

## Why is this insight important?

- **It helps arts organisations to understand the behaviour of attenders in their region – and find out how to market to them effectively**

How can I use this information?

- To determine marketing spend on reaching certain audiences through advertising in media which they consume.
- To describe the audiences which any promotion in the region may reach when approaching media and other promotional partners for promotions and offers
- If you are thinking of approaching brands for sponsorship of your organisation or event, TGI can sometimes make direct links between brands and the arts. For more information and to find out if we can help, contact us through [www.artsaudiences.ie](http://www.artsaudiences.ie)

# What do we know about attenders in each region?

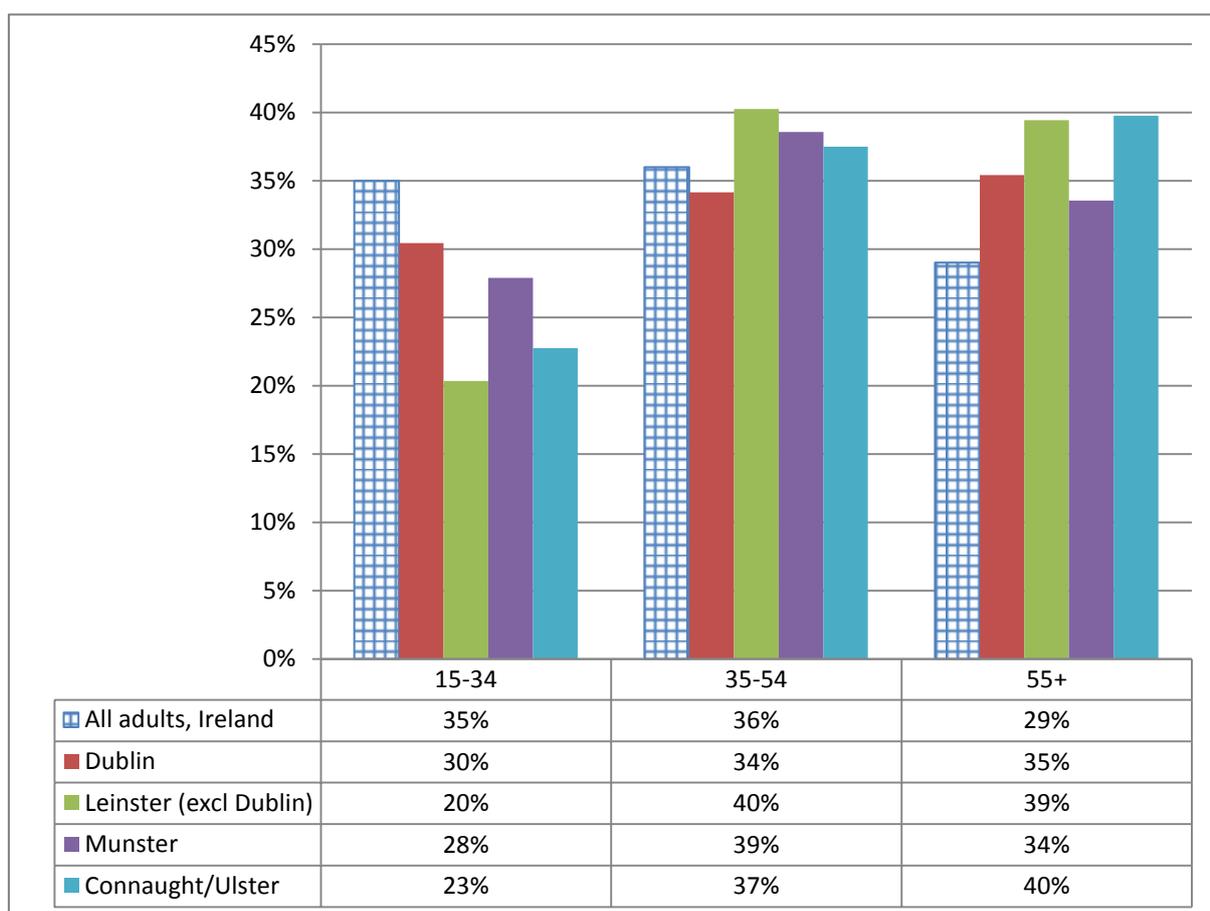
## Age profile of arts attenders in each region

Arts attenders are under-represented in the 15-34 age group in every region.

36% of all adults in Ireland are aged between 35 and 54. In every region except Dublin, the percentage of arts attenders from this age group is the same or higher.

Connaught/Ulster and Leinster have a higher proportion of over 55 attenders than the other regions.

Chart 11: Percentage of all attenders in each region compared to all Irish adults, 2013



## Gender of arts attenders in each region

More women attend the arts in all four regions.

This is most pronounced in Dublin and in Connaught/Ulster.

*Chart 12: Gender of attenders in each region compared to all Irish adults, 2013*

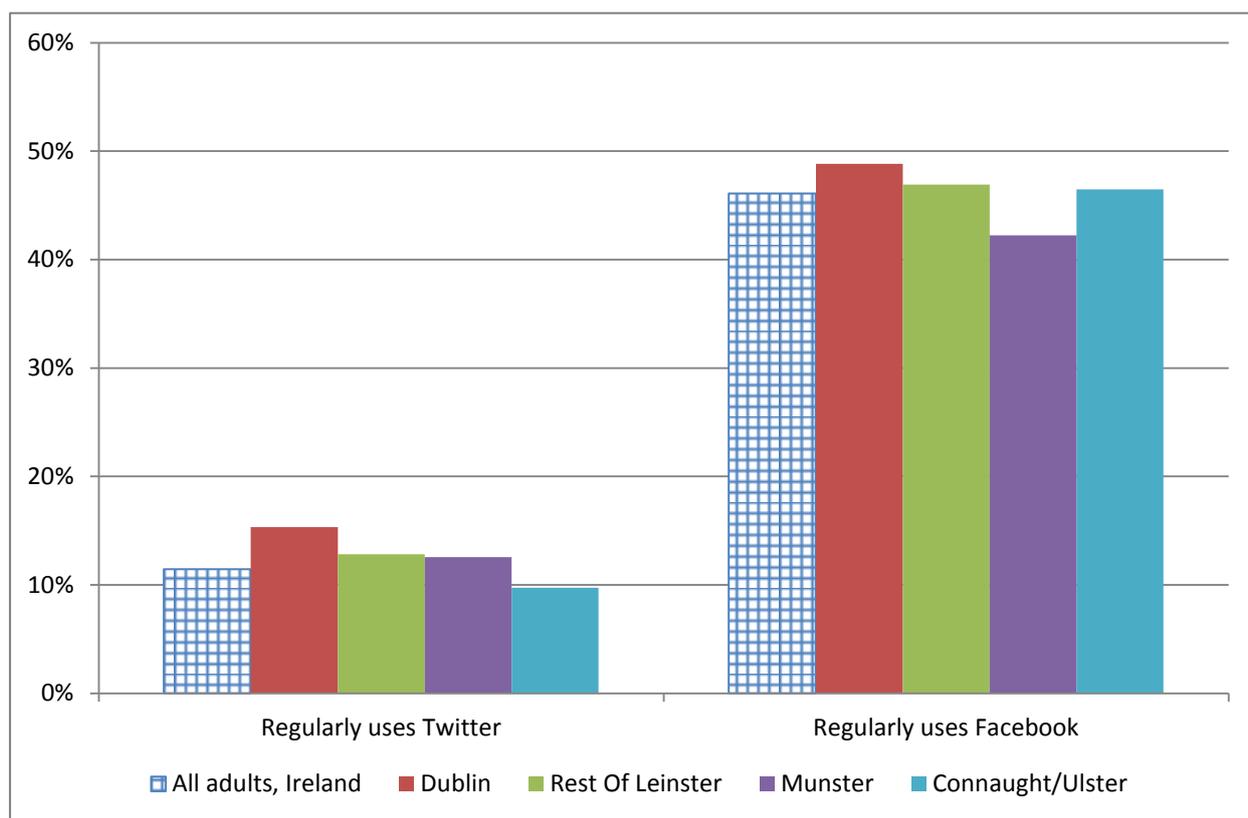
	Men	Women
All adults, Ireland	49%	51%
Dublin	43%	57%
Leinster (excl. Dublin)	46%	54%
Munster	45%	55%
Connaught/Ulster	43%	57%

## Arts attenders' usage of social media in each region

Fewer than 50% of arts attenders regularly visit Facebook.

More arts attenders regularly use Twitter than average in every region except Connaught/Ulster.

*Chart 13: Percentage of all regular attenders in any artform in each region who visit Twitter and Facebook regularly, 2013*



# Employment status of attenders in each region

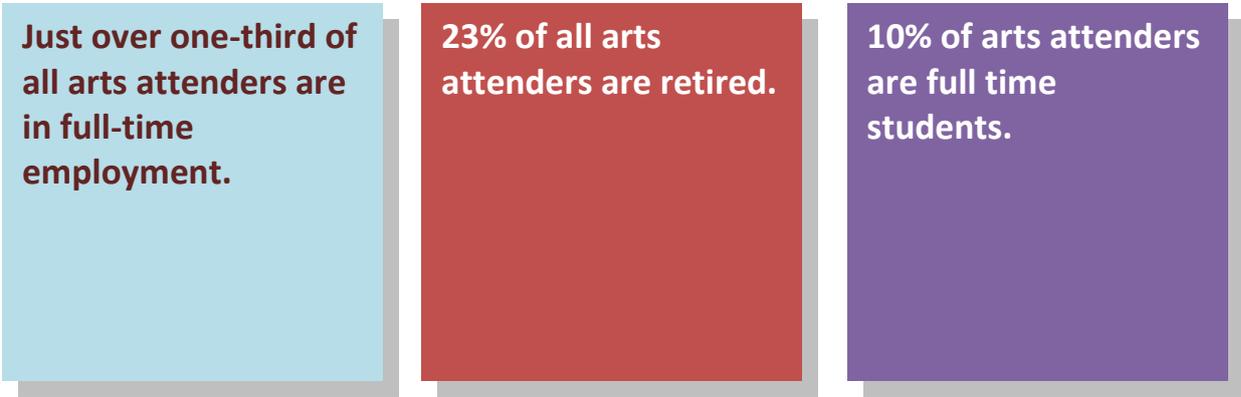
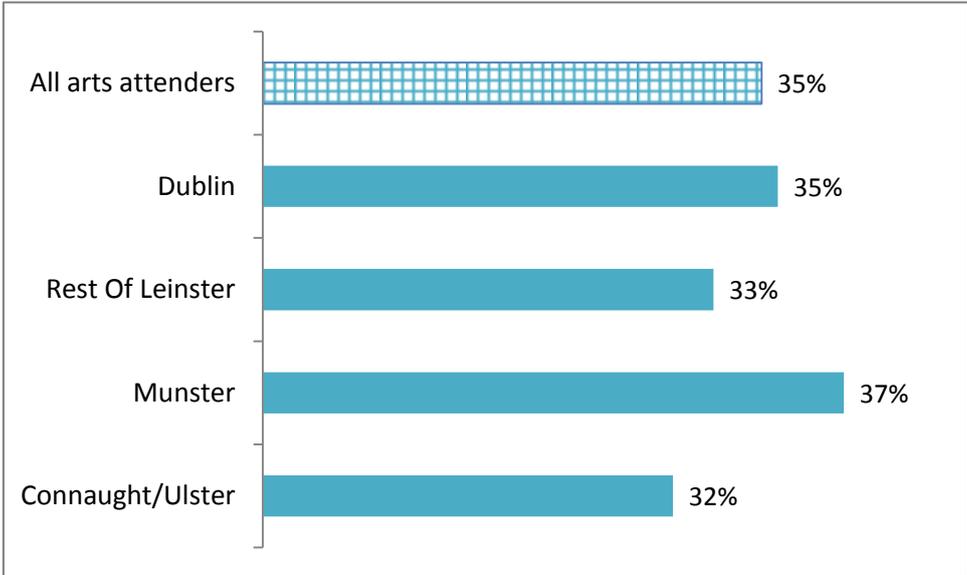


Chart 14: Percentage of attenders in each region in full time employment, 2013



## How attenders respond to direct mail in each region

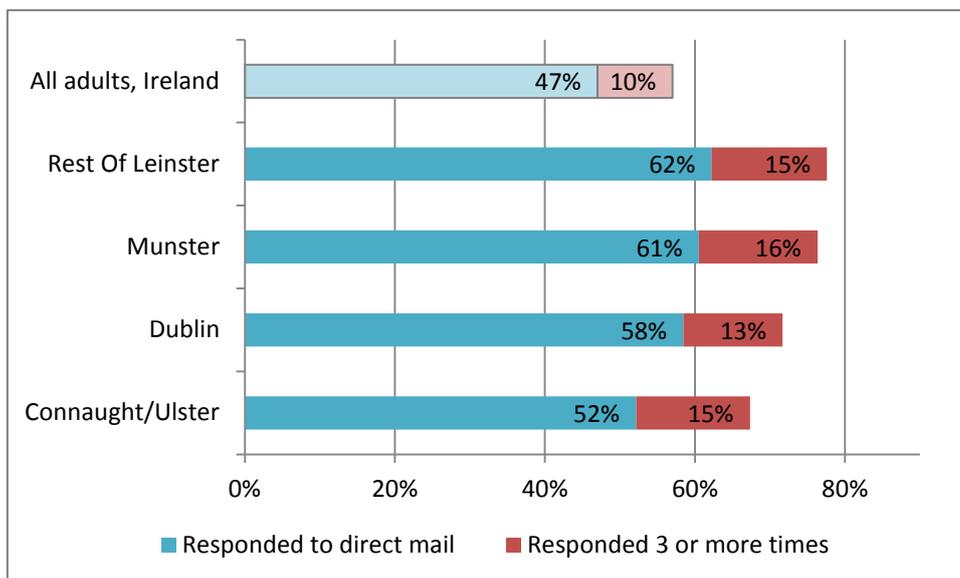
Direct mail is information or promotional materials personally addressed to someone which the person has signed up to receive. It does not include mailings where the recipient is unknown, or junk mail.

**Direct mail is a key channel of communication with arts attenders throughout Ireland.**

**Arts attenders in all regions are more likely to respond to direct mail than the general population.**

**Arts Attenders are more likely to respond frequently to direct mail than the general population.**

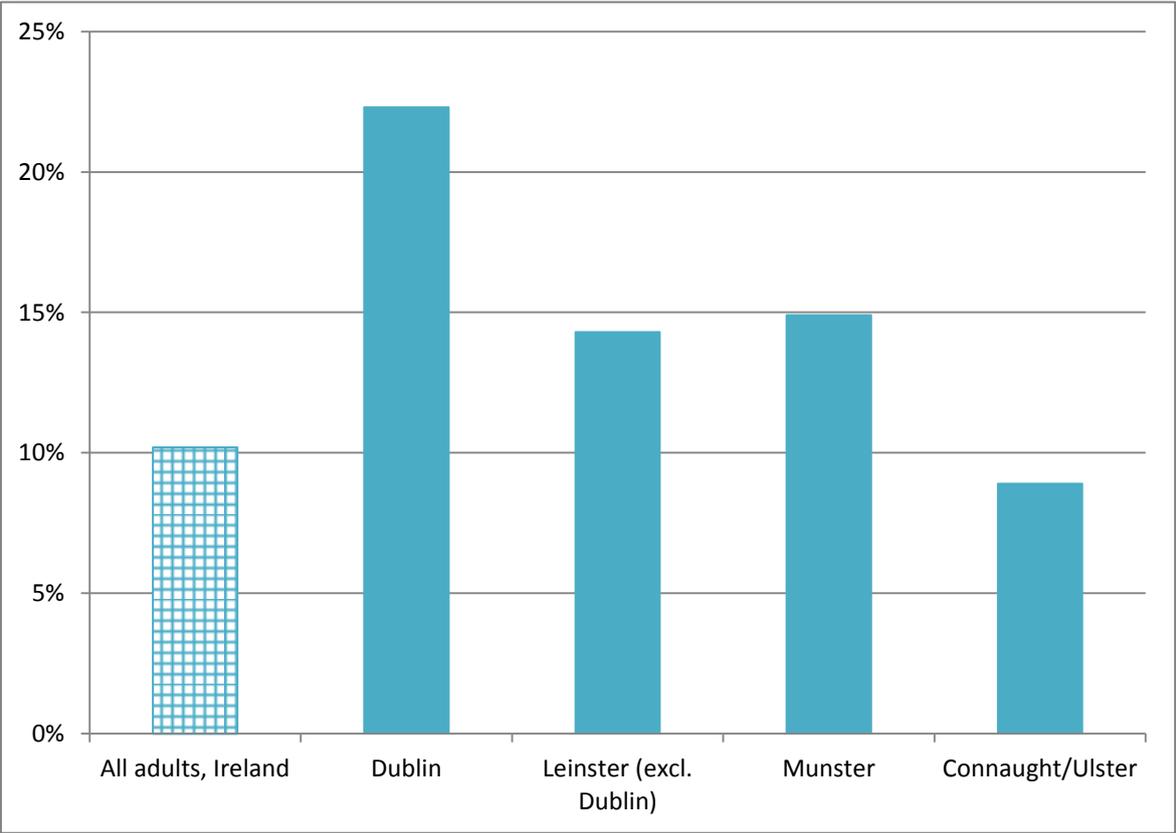
*Chart 15: Each region's responsiveness to direct mail, 2013*



# Online purchasing by attenders in the regions

Arts attenders in Dublin, Leinster and Munster are more likely to regularly purchase tickets for events online than the general population.

Chart 16: Percentage of arts attenders who regularly purchase tickets to events online.



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# **What newspapers and other media are used by attenders in the regions?**

# Dublin attenders

## What daily newspapers are read by Dublin attenders?

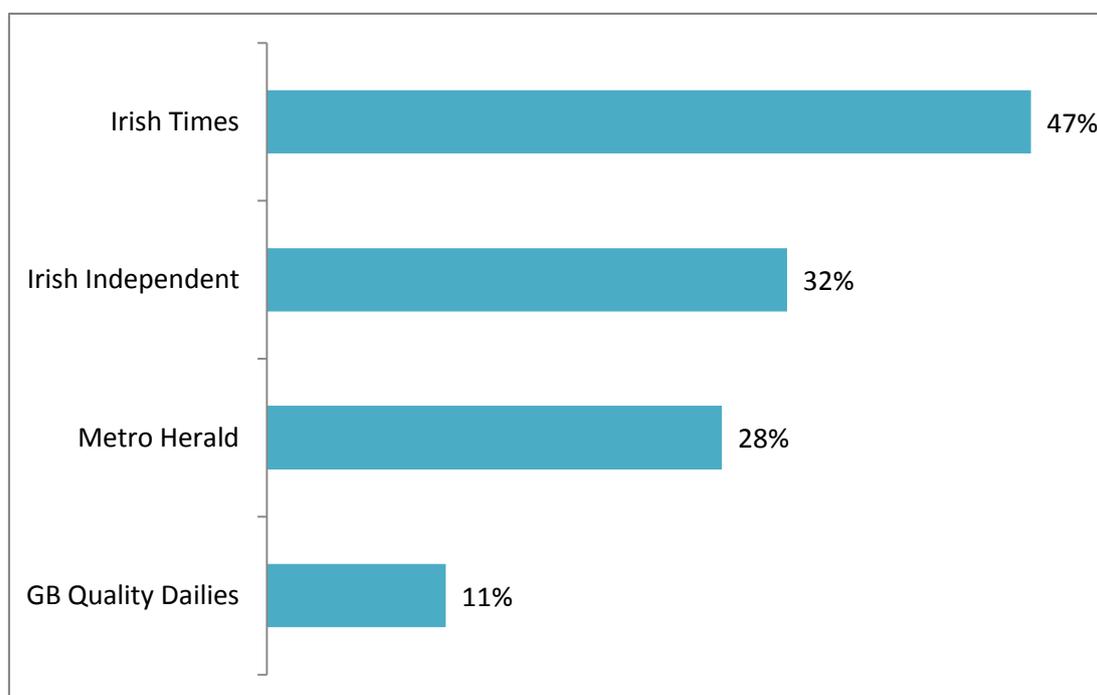
Daily newspapers are a key channel of communication for the arts with audiences; not only in respect of advertising and promotions, but for editorial. Daily newspaper readership varies between the regions and close attention should be paid by marketers to the daily newspapers which arts attenders read in the different regions.

There are **470,000** regular arts attenders in Dublin.

Of these, **333,000 (or 71%)** almost always or quite often read a daily newspaper.

Almost half of all arts attenders read the Irish Times almost always or quite often in this region.

*Chart 17: Percentage of attenders who 'almost always' or 'quite often' read these daily newspapers, 2013*



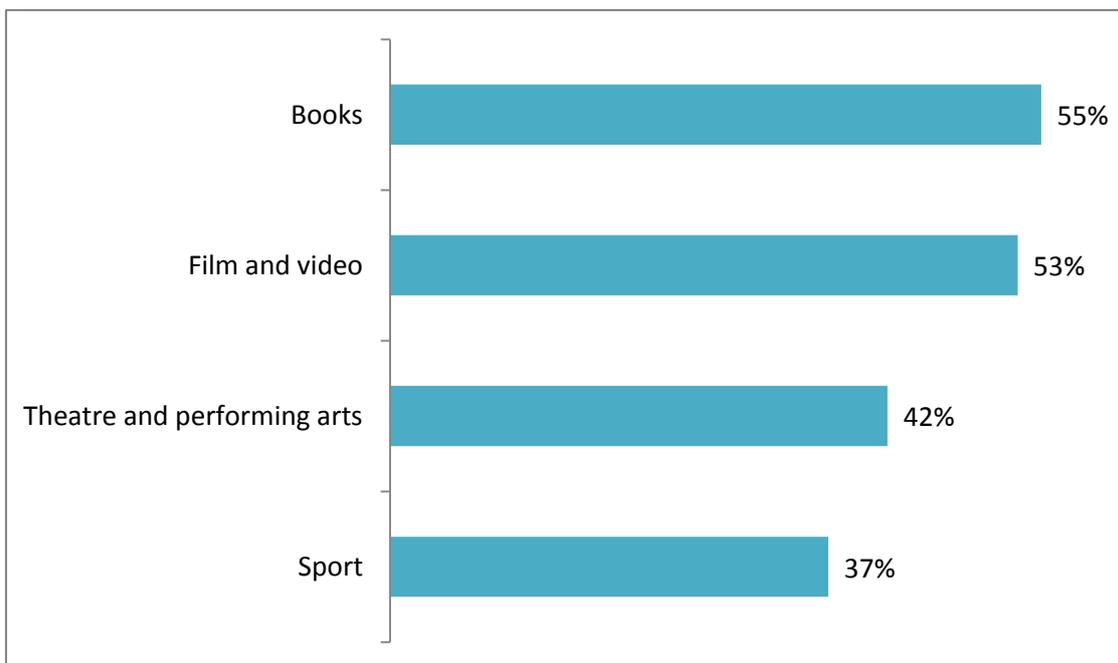
## What are Dublin attenders interested in reading about in their daily newspaper?

Arts attenders do not always turn to the arts pages first; stories about the arts which can be placed in other sections may have a greater penetration than on the arts pages. This chart looks at what percentage of arts attenders are very interested in reading about certain arts-related topics.

**Books are very or fairly interesting to more than half of Dublin arts attenders when reading their daily newspaper.**

**Nearly 40% are interested in reading about sport.**

*Chart 18: What Dublin attenders say they are very or fairly interested in reading about, 2013*



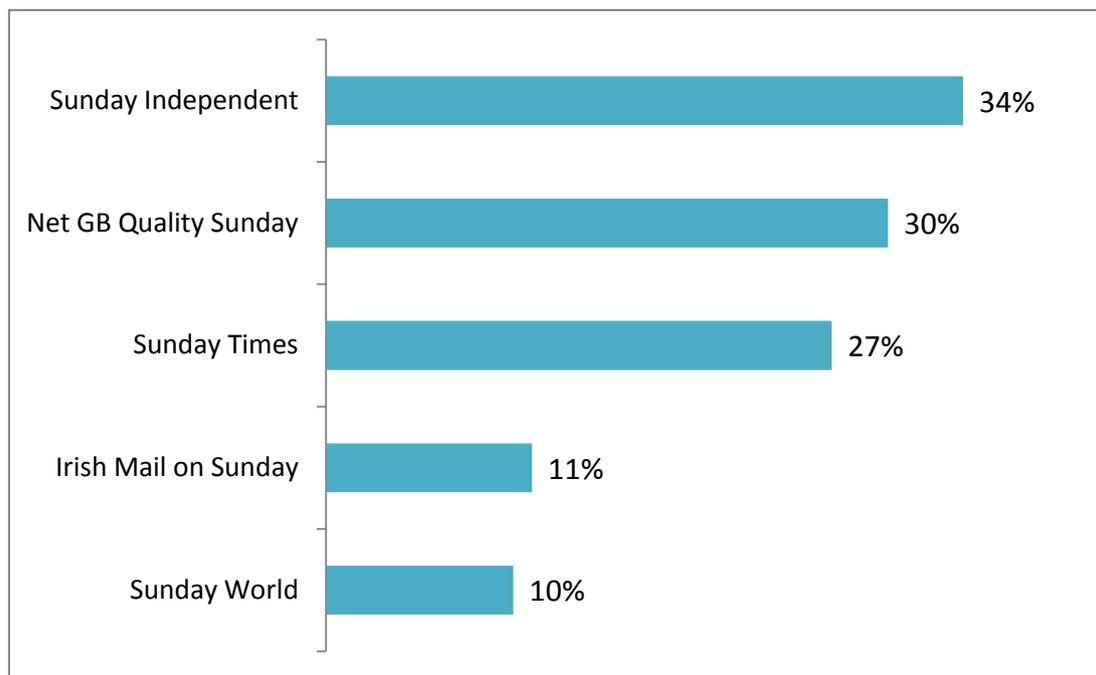
## What Sunday newspapers are 'almost always' read by Dublin attenders?

The Sunday Times scores very highly amongst Dublin arts attenders.

The Sunday Independent (the most read Sunday newspaper in Ireland) is also the most read Sunday paper among arts attenders.

There are 470,000 regular arts attenders in Dublin. 18% almost always read a British Sunday quality newspaper.

Chart 19: Percentage of attenders who 'almost always' or 'quite often' read these Sunday newspapers, 2013



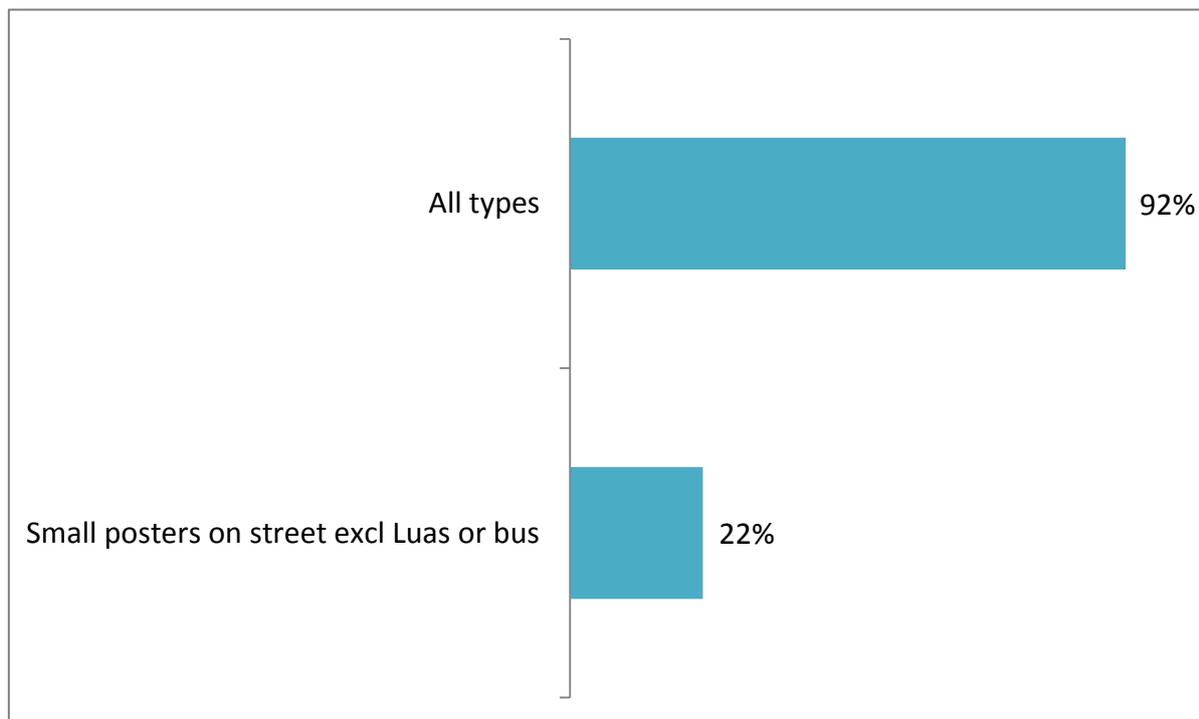
## What outdoor advertising is being seen by Dublin attenders?

Outdoor advertising can be a powerful tool for the arts; it is important for art organisations to know what kinds of advertising are being seen by audiences.

**Almost all arts attenders report that they saw some form of outdoor advertising in the last week.**

**Nearly a quarter of arts attenders say that they have seen small poster sites in the last week.**

*Chart 20: What outdoor advertising Dublin attenders have seen in the last week, 2013*



# Leinster excluding Dublin

## What daily newspapers are read by Leinster attenders?

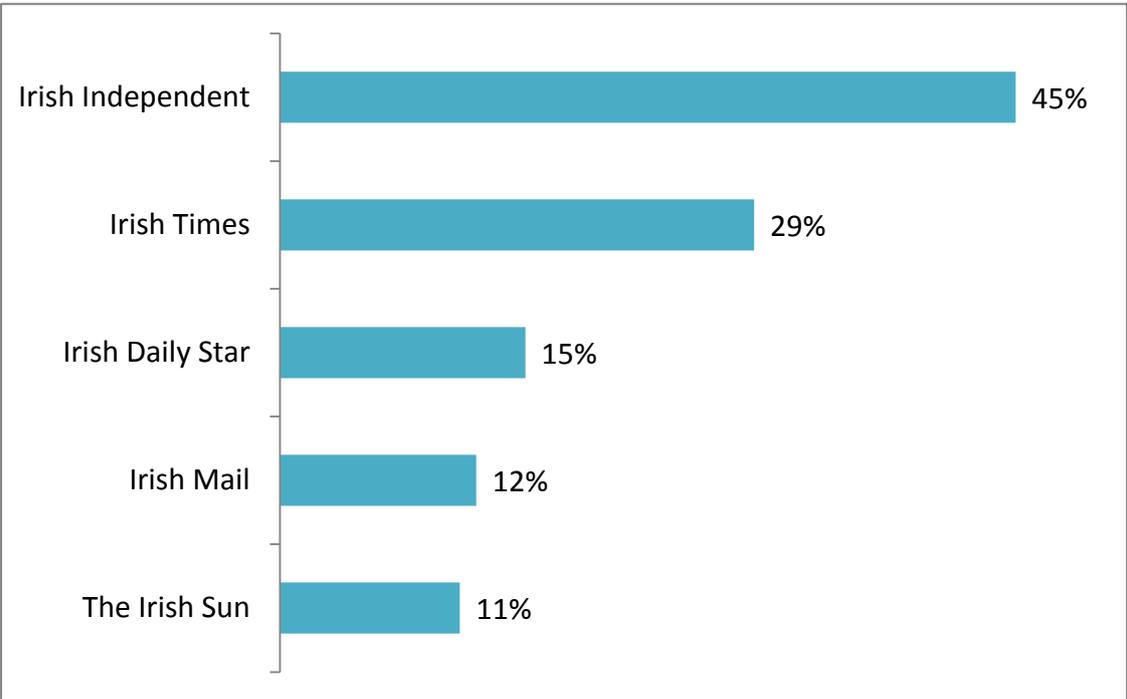
Daily newspapers are a key channel of communication for the arts audiences; not only in respect of advertising and promotions, but for editorial. Daily newspaper readership varies between the regions and close attention should be paid by marketers to the daily newspapers which arts attenders read in the different regions.

**There are 344,000 regular arts attenders in Leinster.**

**Of these, 268,000 (or 78%) almost always or quite often read a daily newspaper.**

**Other counties in Leinster are markedly different from Dublin in that the Irish Independent is read by more arts attenders.**

*Chart 21: Percentage of Leinster (excluding Dublin) attenders who 'almost always' or 'quite often' read these daily newspapers, 2013*



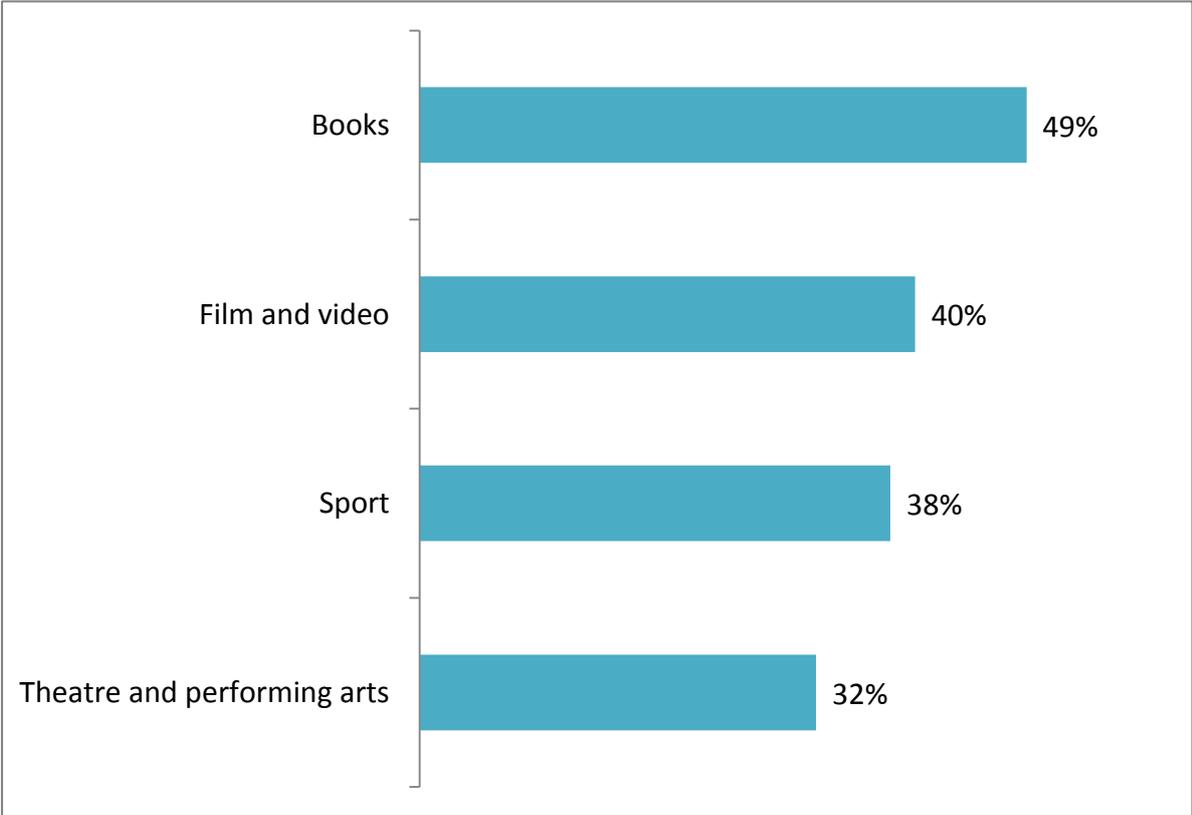
# What are Leinster attenders interested in reading about in their daily newspaper?

Arts attenders do not always turn to the arts pages first; stories about the arts which can be placed in other sections may have a greater penetration than on the arts pages. This chart looks at what percentage of arts attenders are very interested in reading about certain arts-related topics.

**Books are very or fairly interesting to half of Leinster arts attenders when reading their daily newspaper.**

**Nearly 40% of arts attenders are interested in reading about sports in their daily newspaper.**

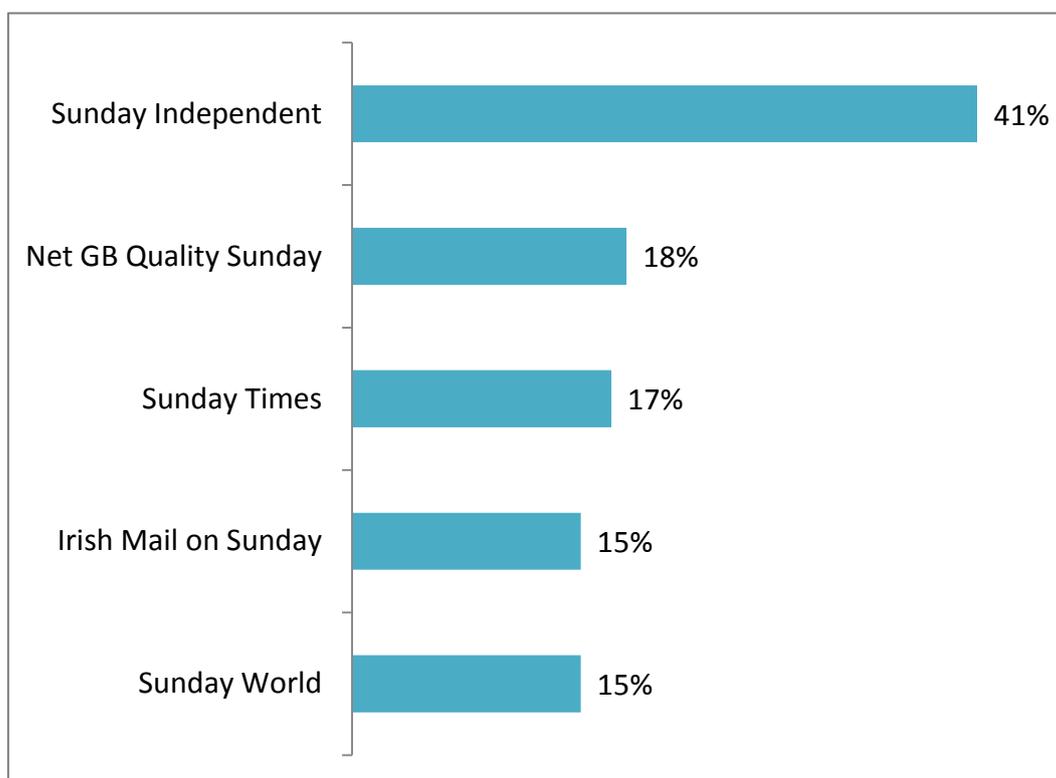
*Chart 22: What Leinster (excluding Dublin) attenders say they are very or fairly interested in reading about, 2013*



## What Sunday newspapers are read by Leinster attenders?

**The Sunday Independent (the most read Sunday newspaper in Ireland) is also the most read Sunday paper among arts attenders in Leinster.**

*Chart 23: Percentage of Leinster (excl. Dublin) attenders who 'almost always' or 'quite often' read these Sunday newspapers, 2013*

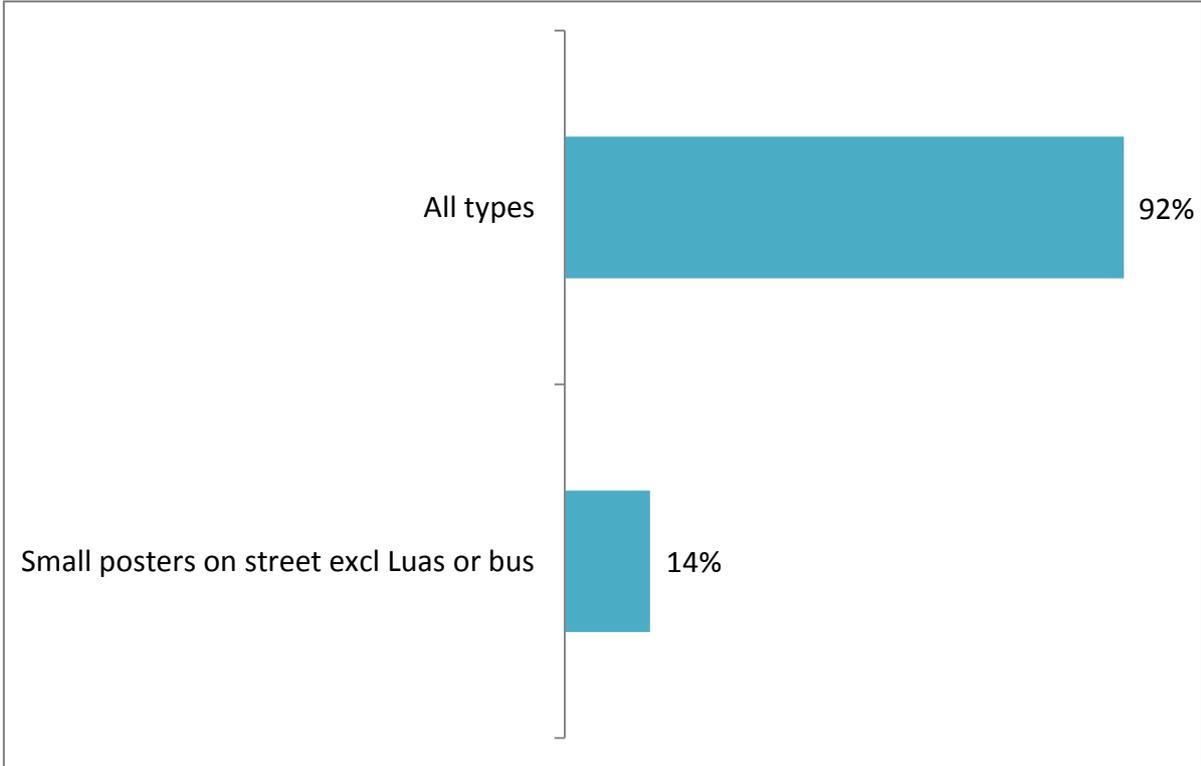


# What outdoor advertising is being seen by Leinster attenders?

Almost all arts attenders report that they saw some outdoor advertising last week.

Fewer arts attenders in Leinster saw small outdoor posters in the last week than in Dublin.

Chart 24: Where Leinster (excl. Dublin) attenders have seen advertising in the last week, 2013



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# Munster attenders

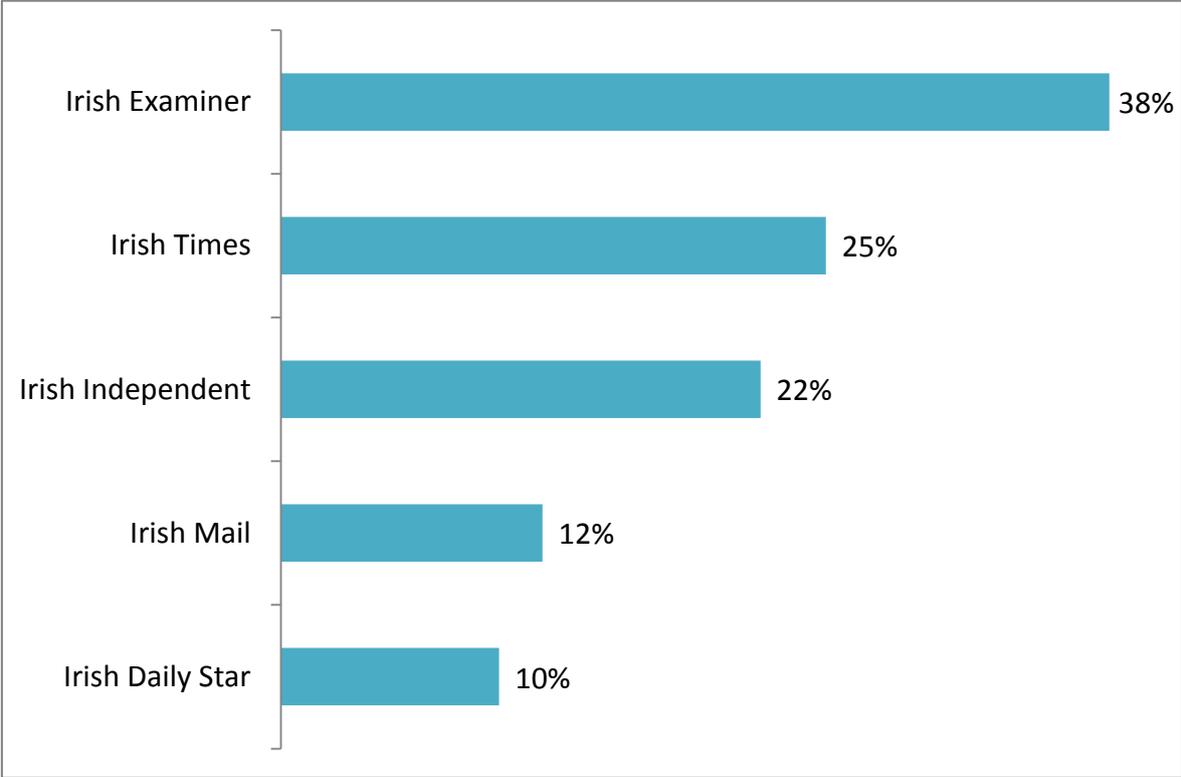
## What daily newspapers are read by Munster attenders?

More arts attenders in Munster read the Irish Examiner than any other newspaper.

There are 423,000 regular arts attenders in Munster.

Of these, 309,000 (or 73%) almost always or quite often read a daily newspaper.

Chart 25: Percentage of Munster attenders who 'almost always' or 'quite often' read these daily newspapers, 2013



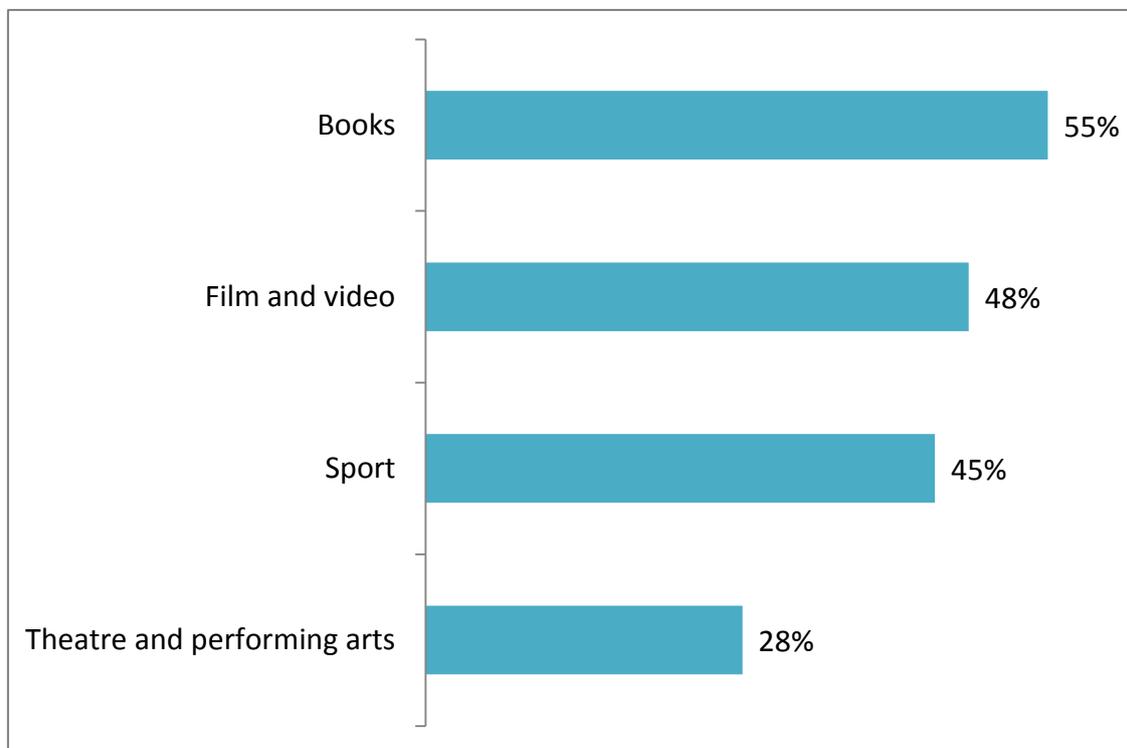
## What are Munster attenders interested in reading about in their daily newspaper?

Arts attenders do not always turn to the arts pages first; stories about the arts which can be placed in other sections may have a greater penetration than on the arts pages. This chart looks at what percentage of arts attenders are very interested in reading about certain arts-related topics.

**Books are very or fairly interesting to more than half of Munster arts attenders when reading their daily newspaper.**

**53% of arts attenders in Dublin are interested in newspaper articles about film and video compared to 48% in Munster.**

*Chart 26: What Munster attenders say they are very or fairly interested in reading about, 2013*

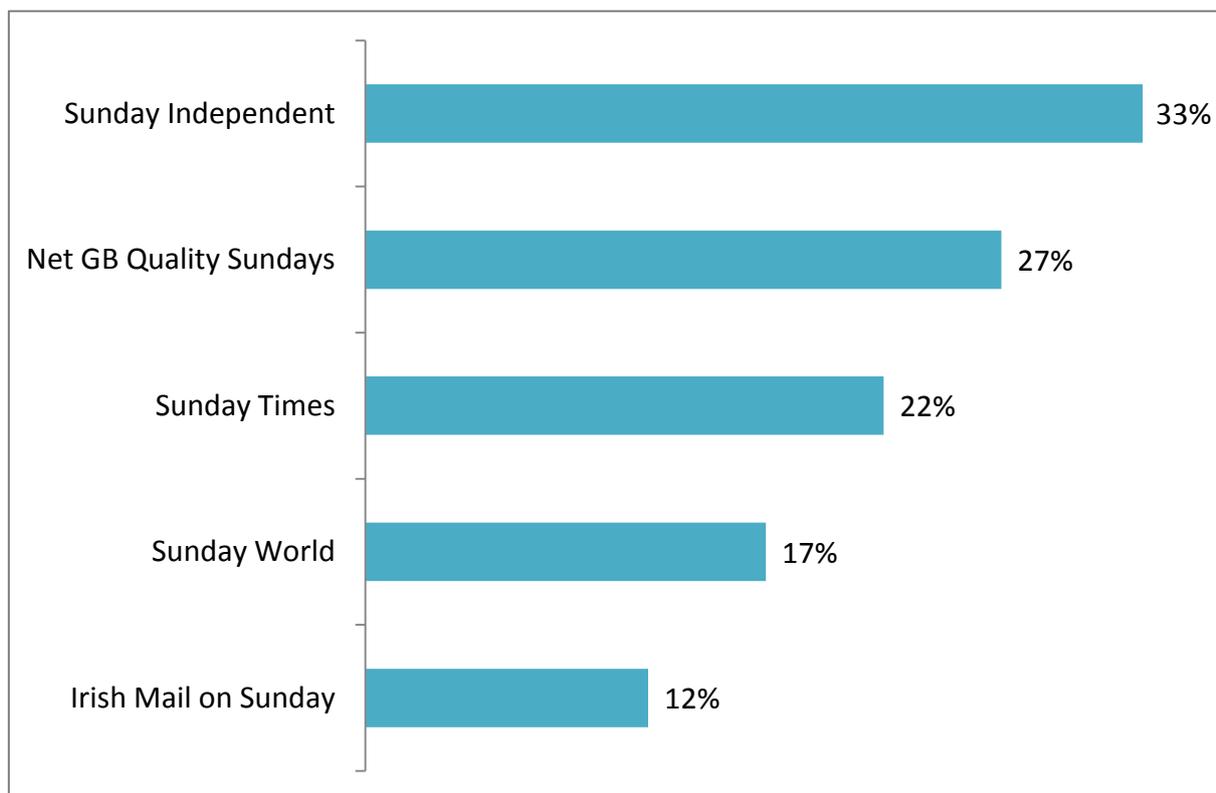


## What Sunday newspapers are read by Munster attenders?

One third of arts attenders in Munster read the Sunday Independent.

Nearly 20% of Munster arts attenders read the Sunday World almost always or quite often.

*Chart 27: Percentage of Munster attenders who 'almost always' or 'quite often' read these Sunday newspapers, 2013*

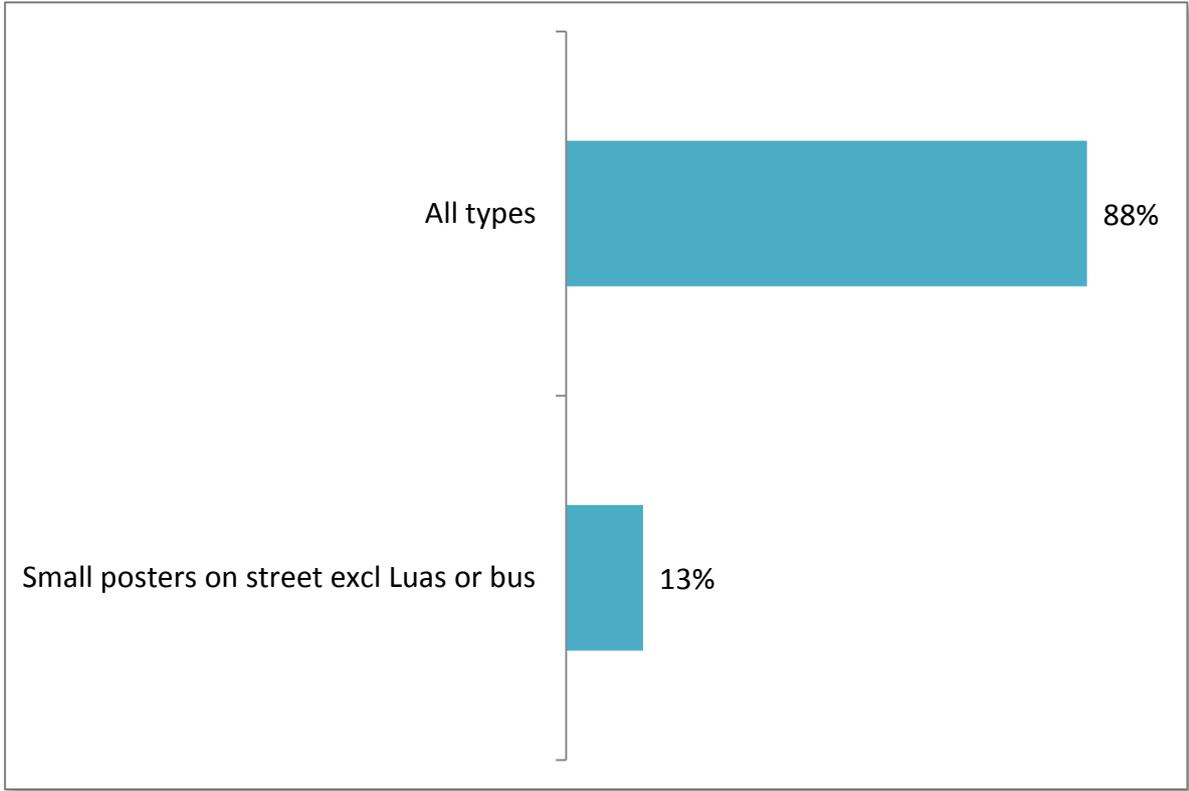


# What outdoor advertising is being seen by Munster attenders?

Outdoor advertising is a key marketing channel for arts attenders in Munster but to a slightly lesser extent than in Dublin and Leinster.

Small posters on the street are seen by fewer Munster arts attenders than in other regions.

Chart 28: Where Munster attenders have seen advertising in the last week, 2013



# Connaught/Ulster attenders

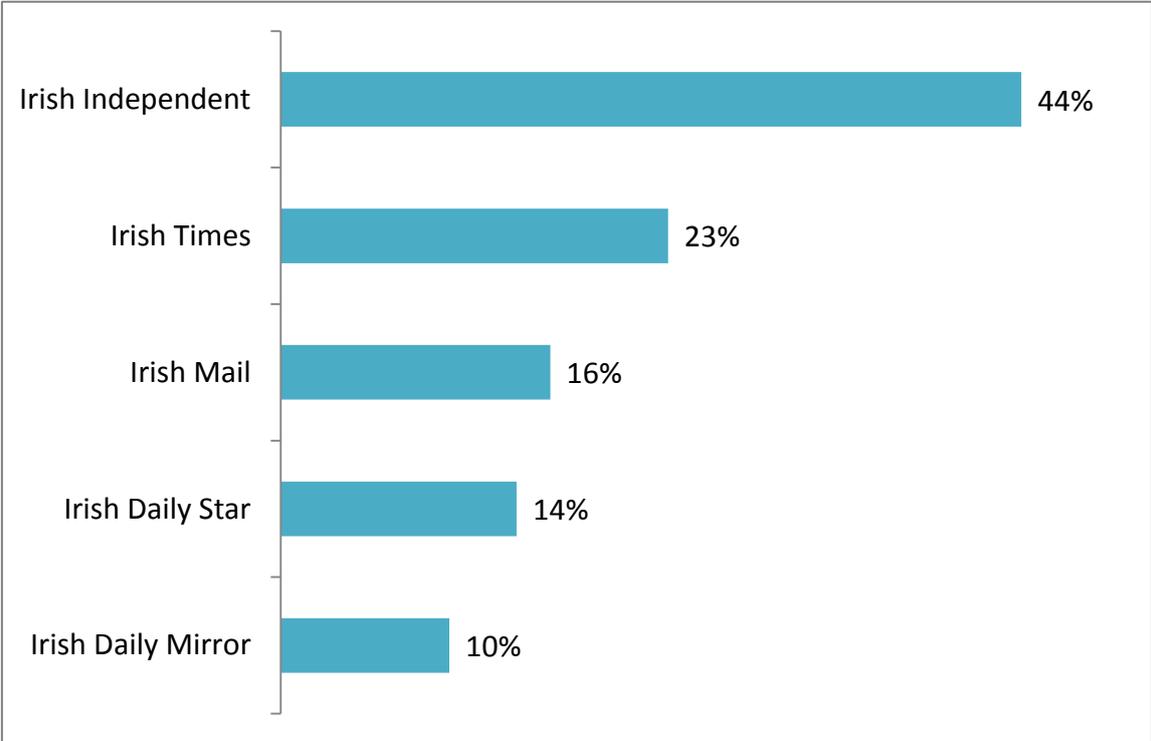
What daily newspapers are read by Connaught/Ulster attenders?

**There are 289,000 regular attenders in Connaught/Ulster.**

**Of these, 213,000 (or 74%) almost always read a daily newspaper.**

**Almost half of all regular arts attenders in Connaught/Ulster read the Irish Independent almost always or quite often.**

Chart 29: Percentage of Connaught/Ulster attenders who 'almost always' or 'quite often' read these daily newspapers, 2013



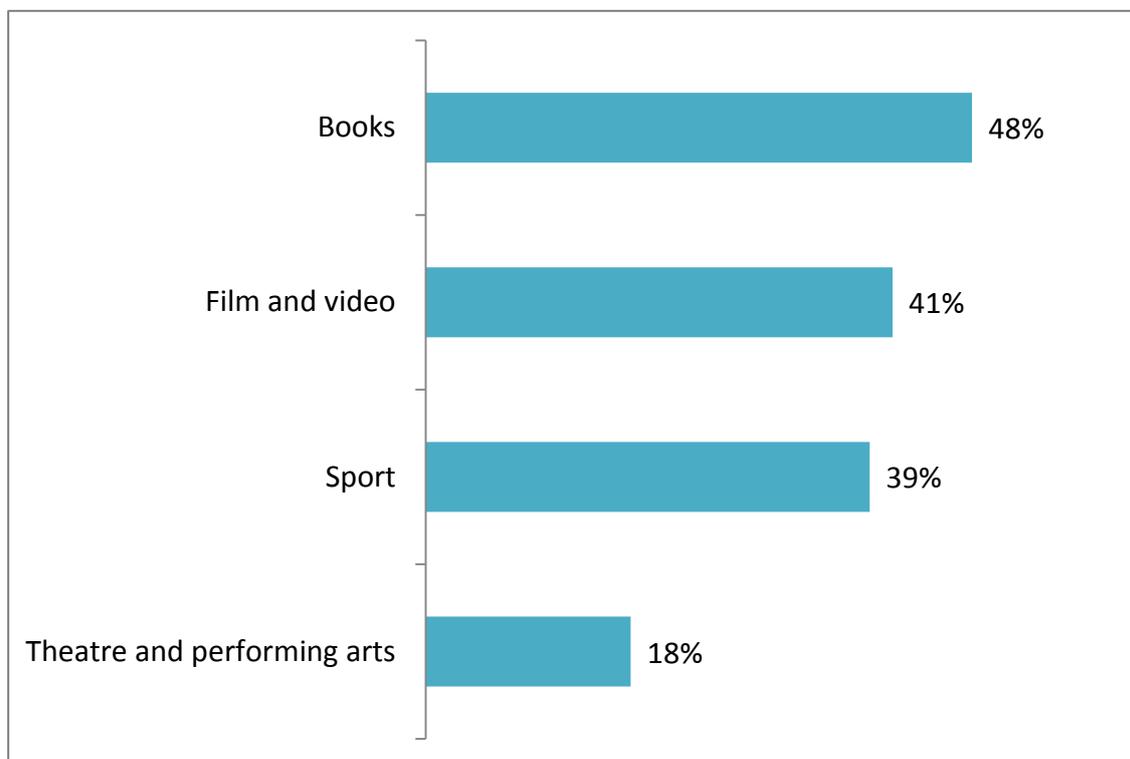
## What are Connaught/Ulster attenders interested in reading about in their daily newspaper?

Arts attenders do not always turn to the arts pages first; stories about the arts which can be placed in other sections may have a greater penetration than on the arts pages. This chart looks at what percentage of arts attenders are very interested in reading about certain arts-related topics.

Books are very or fairly interesting to half of Connaught/Ulster arts attenders when reading their daily newspaper.

Out of all the four regions, Munster arts attenders are most interested in the sports pages (45%) compared to Connaught/Ulster attenders (39%)

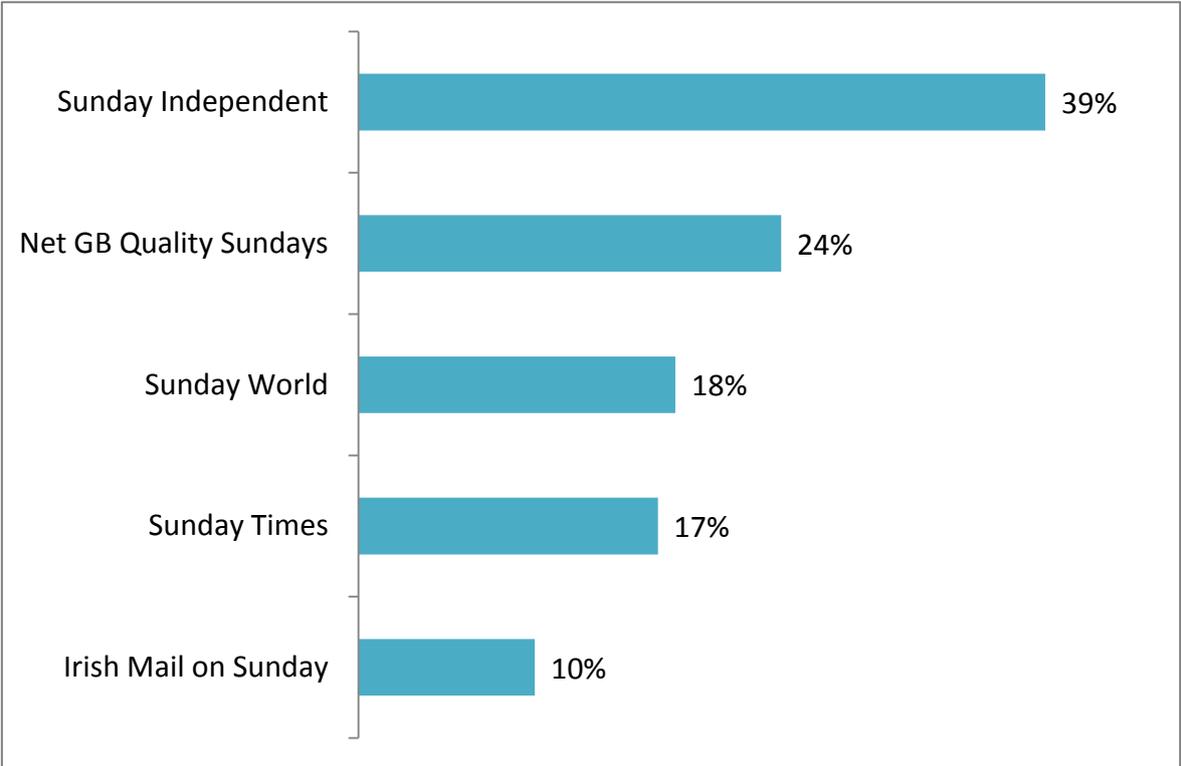
Chart 30: What Connaught/Ulster attenders say they are very or fairly interested in reading about, 2013



# What Sunday newspapers are read by Connaught/Ulster attenders?

Nearly 40% of arts attenders in Connaught/Ulster read the Sunday Independent almost always or quite often.

Chart 31: Percentage of Connaught/Ulster attenders who 'almost always' or 'quite often' read these Sunday newspapers, 2013

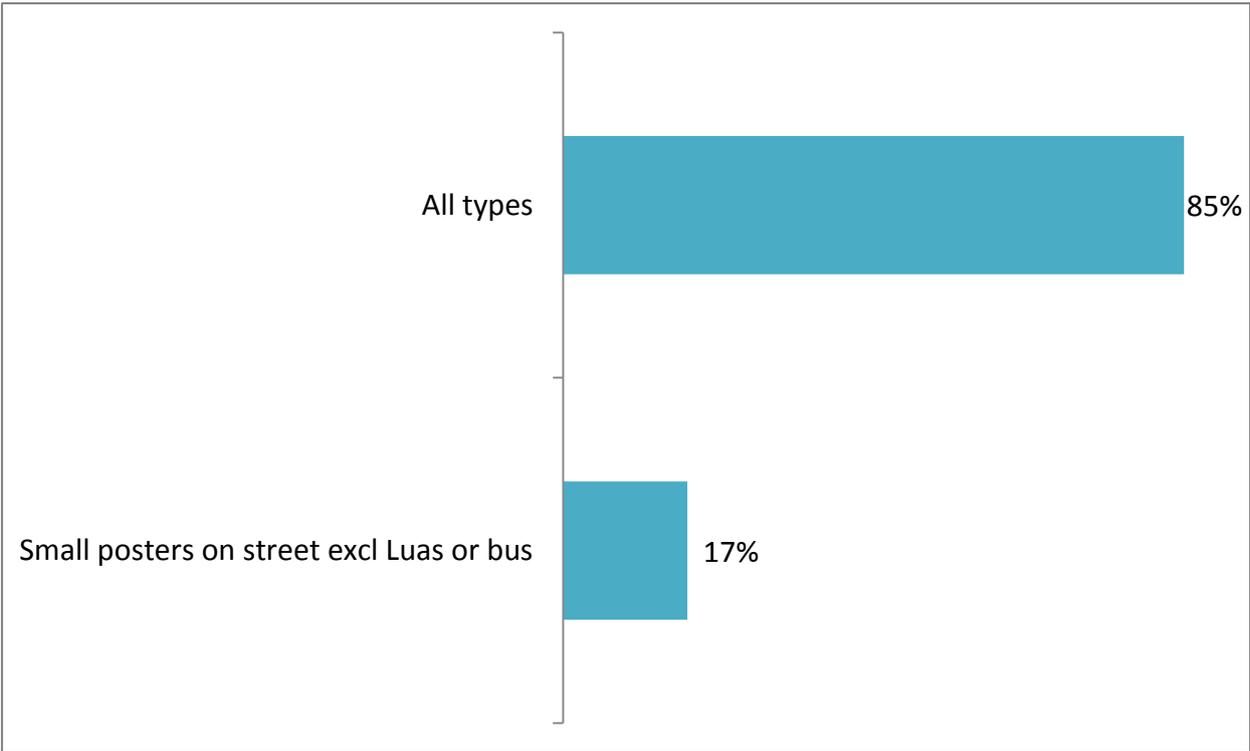


# What outdoor advertising is being seen by Connaught/Ulster attenders?

Outdoor advertising is a key marketing channel for arts attenders in Connaught/Ulster but to a slightly lesser extent than in Dublin and Leinster.

Small posters on the street are seen by fewer Connaught/Ulster arts attenders than in Dublin and Leinster.

Chart 32: Where Connaught/Ulster attenders have seen advertising in the last week, 2013



# Arts attenders & the Internet

# Some information about arts attenders and the Internet

*In generating the reports contained in this document, other interesting information comes to light.*

## Accessing the Internet using smart phones

**Responsive websites are becoming more important: 25% of arts attenders regularly access the Internet using a mobile phone.**

## Arts attenders' frequency of Internet access

**Arts attenders are heavy Internet users: 54% of arts attenders log on to the Internet more than once a day.**

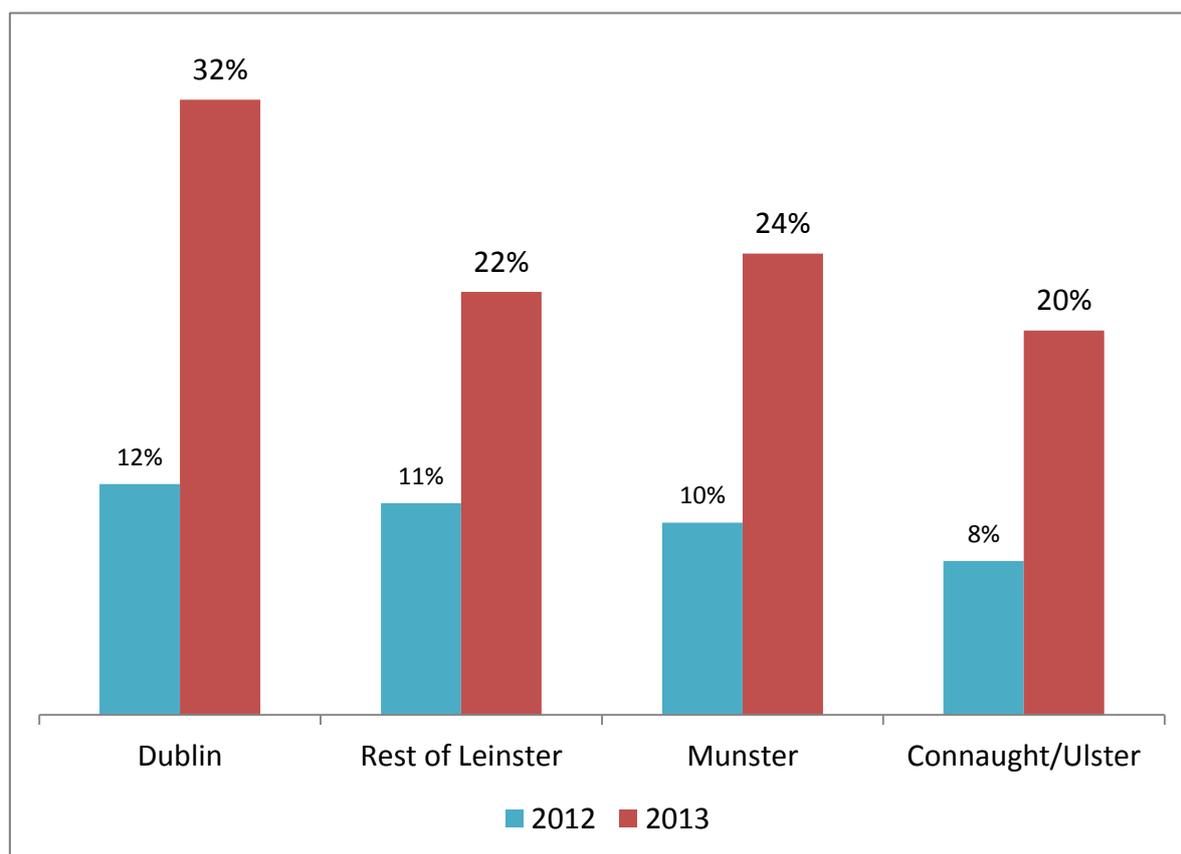
## Strong media website usage among arts attenders

**Most arts attenders visit newspaper and TV station websites: 53% visit TV websites and 60% visit newspaper websites.**

## Tablet ownership

Tablet ownership among arts attenders has increased dramatically, particularly in Dublin.

*Chart 33: the percentage of arts attenders in each region who own a tablet computer, 2012 and 2013*



# Appendices

# What else do we know about TGI research and this report?

## About this report

This annual report uses the resources of the Target Group Index survey for Ireland to quantify arts attendance in Ireland in 2012/2013. It provides demographic information on arts attenders (where they come from, what age they are etc.) and behavioural information about them to assist the arts sector in reaching them more effectively.

This is the most up-to-date information available and looks at year-on-year trends. The report was prepared by Una Carmody, Director of Arts Audiences in November 2013. Thanks are due for their assistance to Eimear Faughnan of Kantar Media UK Ltd and Roisin Bell of KnowledgeWorks.

## What is the Target Group Index?

The Target Group Index is a large-scale survey carried out in Ireland and collated by Kantar Media UK Ltd. The survey is carried out in two waves – October to December and January to April each year and results are released each September. The survey has been carried out each year since 1994 and the sample size for TGI ROI 2013 was 3,003 adults (defined as any person 15 or over).

The survey intends to be representative of Republic of Ireland adults by geography and major demographics. (Fuller details on methodology can be made available by request.)

The Target Group Index covers four main areas:

- Demographic information – where people live, their age and social class etc.
- Media information – what media they see and consume and how they use it
- Brands – information about brands, goods and services as well as what people do in their spare time
- Attitudes – what people think

The survey, in common with the GB survey, covers a number of areas of relevance to the arts. It covers in detail the attendance behaviour of the population of Ireland in relation to the arts.

The detail covered in the survey is extensive: for example in relation to Press the survey asks respondents about their readership of newspapers and magazines, recency and frequency, and the topics of interest to them.

The Target Group Index is used extensively by the media and advertising industries to plan and buy media for brands and to profile and understand audiences and population segments.

- The Target Group Index (TGI) is a sample survey, which asks questions about reported behaviour.
- As with any sample survey, the results are subject to a margin of error. As an example, for percentages based on the total sample, this margin would be  $\pm 1.7\%$ . This means that figures quoted are in a range; particularly where numbers are smaller, the range can vary and should be taken as indicative.
- Readers should note that the survey does not differentiate between attendances at arts events in Ireland or elsewhere; a proportion of people attending arts events will do so outside Ireland.
- The TGI is the best available information at this time, providing a wealth of interesting and informative information to us all about arts attendance
- Where required, users of the report should contact Arts Audiences for information on the specific sample sizes or statistical caution attached to particular target-groups cited within this report.
- Users should also be assured that – unless otherwise stated – analysis has not been conducted on any samples of less than 100. For this reason, some detailed information about specific audiences cannot be included in the report.
- In certain charts, data may not equal due to rounding of figures. This should be borne in mind.

This TGI survey covers attendance at:

- Any performance in a theatre (This could be amateur performance, music etc.)
- Art galleries and exhibitions
- Ballet
- Classical music concerts and recitals
- Contemporary Dance
- Folk concerts
- Jazz concerts and performances
- Opera
- Plays

Where data is not sorted numerically, these artforms are placed in alphabetical order.

This report was produced in October 2013 by Arts Audiences.  
All data ROI TGI (c) Kantar Media UK Ltd.

# End