

Arts Attendance in Ireland

Target Group Index 2008/2009

Report prepared in June 2010

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Chapter 1: Introduction

1.1 Arts attendance in Ireland - 2009 report - Phase 1

This report, the first of its kind, uses the resources of the Target Group Index survey for Ireland to quantify arts attendance in Ireland and to provide 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.

The report was prepared by Una Carmody, Director of Arts Audiences in May and June 2010. Thanks are due for their assistance to Eimear Faughnan of Kantar Media UK Ltd and Roisin Bell of Knowledgeworks.

1.2 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 the 2009 data release was 3,109 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 and Appendix 1 contains details of the survey itself).

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, regency and frequency, and the topics of interest to them. For outdoor media, respondents are asked to outline their response to outdoor formats, for example poster advertising, and their attitudes to outdoor advertising.

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.

1.3 What is the context for this report?

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 key issues is to ensure that we know the size, scope and profile of audiences in Ireland.

The initiative has been charged with devising a method to secure a sound evidence base for audience information about the arts in Ireland. A stepped approach over a number of years will be taken with arts organisations to ensure that robust audience information is available. An action plan is currently being drawn up.

In the first instance the Target Group Index provides a starting point and Arts Audiences is making this information available to arts organisations for two main reasons:

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

The Target Group Index 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 attendance 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.

1.4 Contents of the report

This report outlines some key facts and findings about arts attendance in Ireland in two main sections.

Section 1	Overall arts attendance
	Attendance by artform
	Some information about the audiences for each artform

Section 2 Audience insight information

Regional audiences for the arts and some information about their behaviour

This report is the first release of information from the Target Group Index. There will be a further release of information from Arts Audiences in July 2010 and Arts Audiences welcomes input from interested parties as to what further information would be of use. You can ask a specific question or suggest a form of enquiry on our website www.artsaudiences.ie. We can't promise that every question can be answered but we will certainly do our best.

In addition, work will be carried out by Arts Audiences to tie together where possible the results of the Target Group Index with other rich sources of information about audiences, such as The Public and the Arts (2006) and the Theatre Forum Benchmarking Report 2010. An initial comparison of findings between TGI and the Public and the Arts states *"Findings from the TGI survey are very similar to The Public and the Arts 2006 in relation to plays, opera, ballet, contemporary dance, jazz and pop/rock. In all cases, the TGI and P&A 2006 findings are within the margins of error. This is reassuring and increases confidence in both studies....Overall..there are many similarities between the two studies in relation to arts attendance and it is possible to explain the difference that do exist."*

Data from the 2009/2010 survey will be available in September 2010. When this is received it will allow for comparisons to be made year on year and to track trends.

1.5 Key findings

Number of arts attenders

- 66% of the adult population, or approximately 2.3 million people, are arts attenders*
- 1.8 million people (51% of the adult population) attend once a year or more often

These figures compare with a figure of just over 2.5 million for cinema attendance.

Most popular art forms

The highest attendances were reported at:

- | | |
|---------------------------------|-----------|
| ▪ Any performance in a theatre | 1,696,000 |
| ▪ Plays | 1,615,500 |
| ▪ Art Galleries and Exhibitions | 1,241,100 |

The lowest attendance was reported at ballet, with 297,300 people reporting that they attend.

NB In every case, it must be borne in mind that provision and availability of artforms varies widely; this should also be borne in mind in reading the regional reports in Chapter 3.

The gender divide / Popularity among men and women

46% of arts attenders are male (compared with 49.4% in the general population)

54% of arts attenders are female (compared with 50.6% in the general population).

Buying books

Just over 2.1 million adults reported that they had bought a book in the last 12 months. Further work remains to be completed on the relevant breakdowns.

Frequency of attendance

Frequency of attendance is a key issue, with large differences between those who report that they go once a year and those who go less often (see the table below). This could 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.

	Attend less than once a year
All Arts Attenders	515,000
Any performance in a theatre	549,900
Plays	631,900
Opera	241,200
Ballet*	200,500
Contemporary Dance	244,100
Classical music concerts/recitals	339,000
Folk Concerts	368,400
Jazz concerts	263,000
Art Galleries or Exhibitions	460,000

Participation

Just over 1.2 million people report that they regularly do artistic or creative activities such as drawing, painting, photography etc.

The survey covers attendance at:

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

Chapter 2: Arts attendance in Ireland - an overview

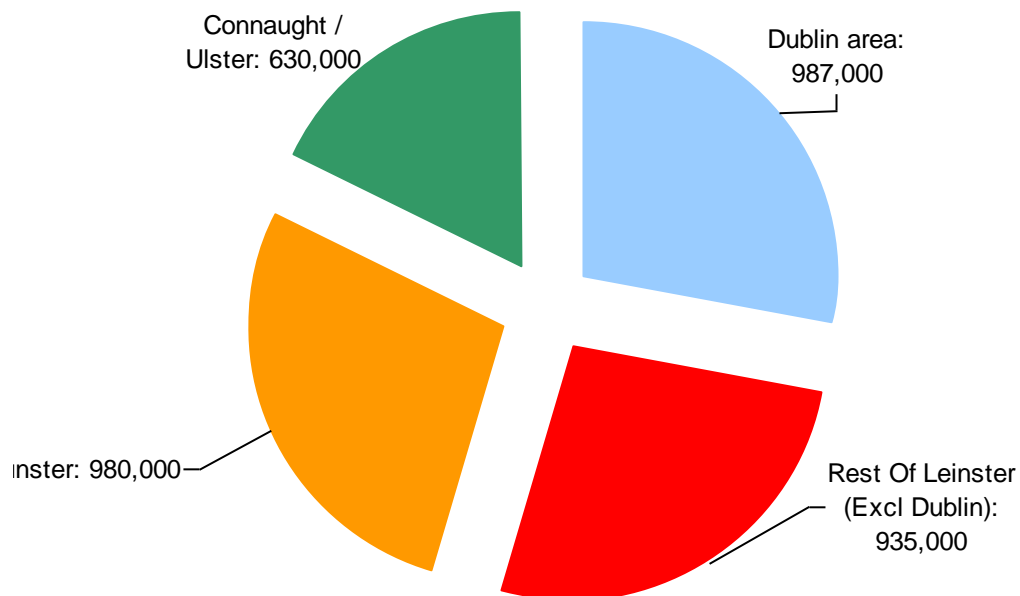
2.1 Ireland – a demographic profile

In 2010, the adult population of the Republic of Ireland was just over 3.5 million. Of these, a little over half (50.6%) were women, and a little less than half (49.4%) were men.

41% of the population were classified as ABC1. The definition of ABC1 is at Page 16 of Appendix 1.

This adult population was spread across the regions as follows:

- 28% lived in the Dublin area.
- 26% lived in Leinster, outside Dublin.
- 28% lived in Munster
- 18% lived in Connaught and Ulster



2.2 Overall arts attendance

	Once A Year or More Often	Inc Less often	Other
Arts Attenders	1,816,170	2,331,100	
Any performance in a theatre	1,146,080	1,696,000	
Plays	983,600	1,615,500	
Opera	154,670	395,900	
Ballet*	96,800	297,300	
Contemporary Dance	164,830	408,900	
Classical music concerts/recitals	441,380	780,400	
Folk Concerts	321,240	689,600	
Jazz concerts	193,550	456,500	
Art Galleries or Exhibitions	781,600	1,241,100	
<i>Pop /Rock concerts**</i>	<i>937,000</i>	<i>1,480,000</i>	
<i>All cinema goers**</i>			<i>2,547,000</i>
<i>*Sample warning</i>			
<i>** For reference purposes</i>			

Figures for pop/rock concerts and cinema are given here for purposes of comparison and are not included in the total arts attendance figures given above.

An analysis of those who attend at all genres shows that the sample size is too small to draw any reliable data from. This indicates that the figure is in the tens of thousands nationally.

These figures include all categories of attender, and exclude only those who report they never go.

Chapter 3: Profile of arts attendance for each art form

(i) What is covered in this section?

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).

The numbers in this section differ from Section 1, which includes those who attend less often than once a year.

(ii) How to read the age group graphs

Figures are in thousands (except where percentages are indicated).

1. The blue blocks represent the general population of Ireland and the numbers of people in each age group. The dark line represents the number of arts attenders for the artform.

Look first at the relationship between the two without looking for numbers; this will give you a picture of the age of attenders in relation to the general population.

2. The axis on the left hand side of the graph is the numbers in the population. The axis on the right is the number of adults who attend at the artform.
3. Below the graph, we have broken down the numbers of people who attend into age groups...

(iii) How to read the region graphs

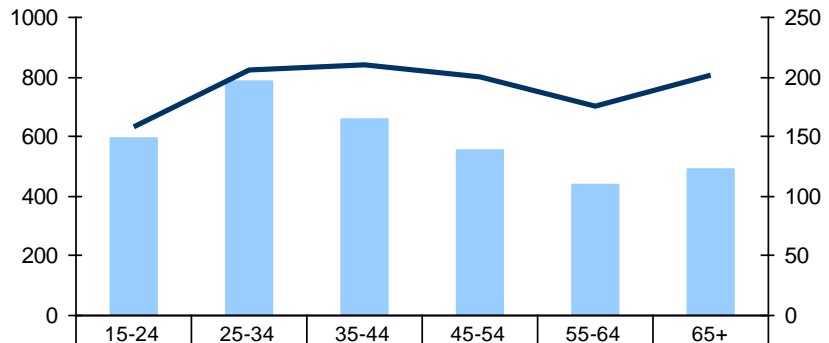
Figures are in thousands (except where percentages are indicated).

1. Look first at the general relationship between the blue blocks and the dark line. This will give you the general picture of how the population breaks down by region, and attendance profile by region of attenders for the artform.
2. The axis on the left hand side of the graph is the number of people in the population who live in each region. The axis on the right is the number of adults who attend at the artform
3. Below the graph we have broken down the numbers of people who attend by region.

3.1 Any performance in a theatre

Theatre - by age group

54% of regular theatre-goers are **ABC1**. This compares to 41% of the total population.

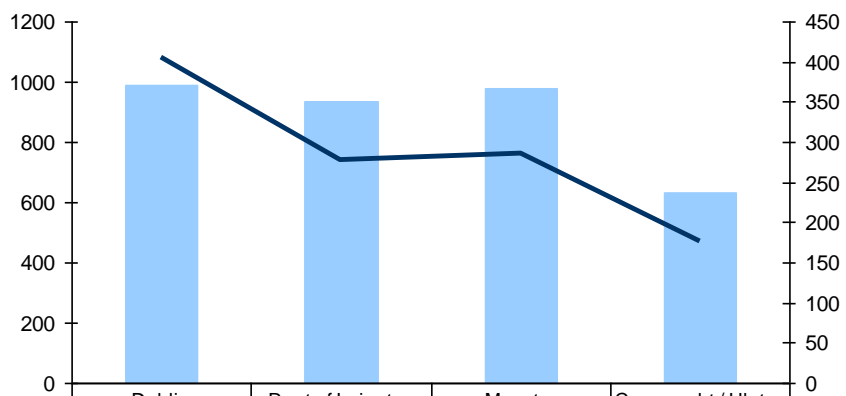


Total Pop	597	787	660	554	441	493
% of total pop in age group	17	22	19	16	13	14
Regulars	158	206	209	199	174	200
% of Regulars in age group	14	18	18	17	15	17

The total adult population is 3.5 million and the number of regular theatre-goers is 1.15 million

Theatre - by region

43% of regular theatre-goers are **men**, 57% are **women**. This compares to 49.4% and 50.6% in the general population

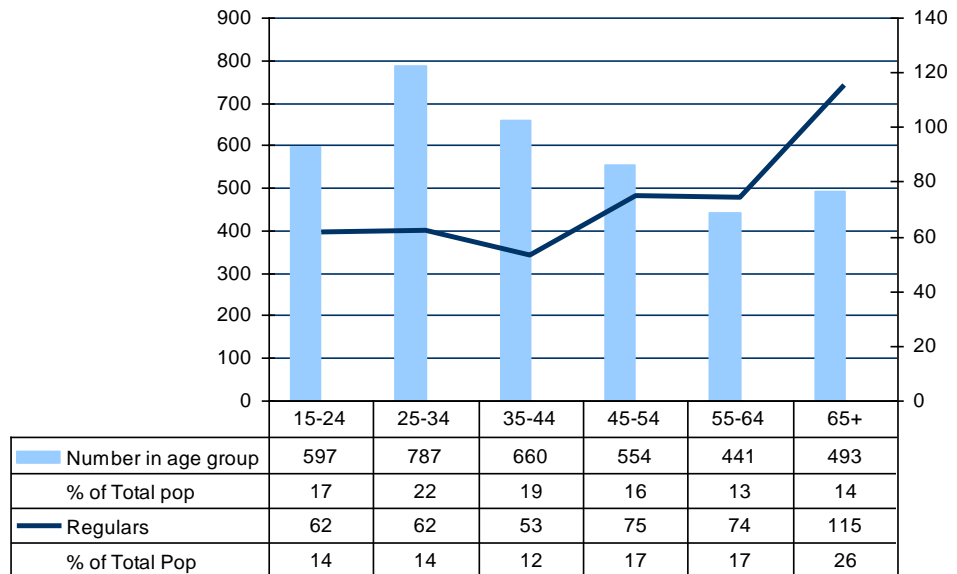


Total pop	987	935	980	630
% of Total pop in region	28	27	28	18
Regulars	406	277	286	177
% of regulars in region	35	24	25	15

3.2 Classical music

Classical Music - by age group

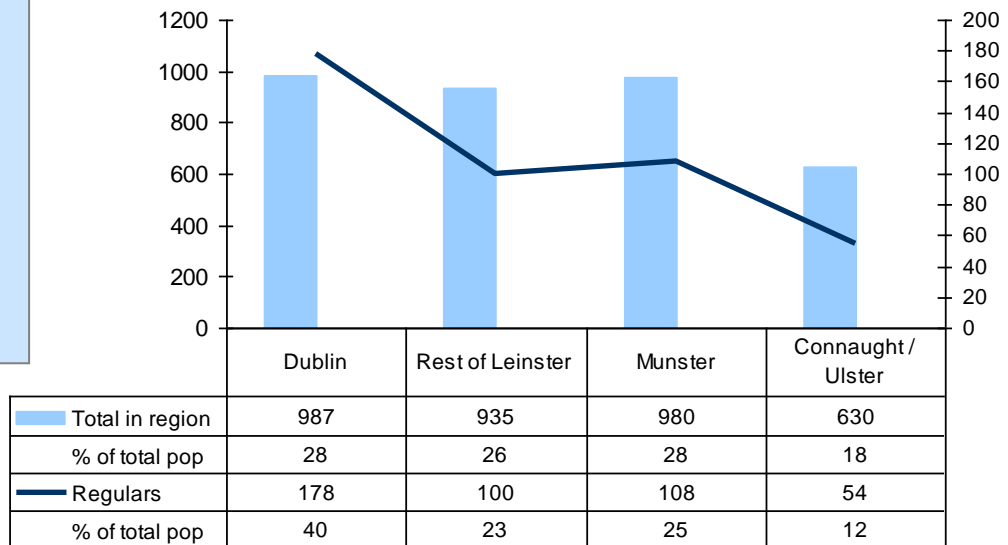
53% of those who attend a classical music performance regularly are **ABC1**, (compared to 41% of the total population)



The total adult population is 3.5 million and the number which attends classical music performances is 441,000

Classical Music - by region

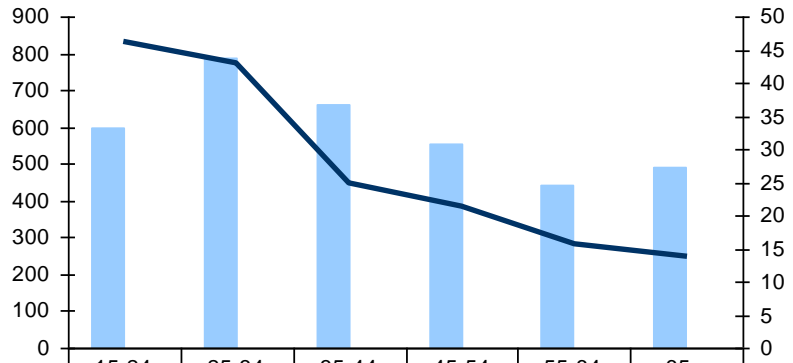
42% of those who attend a classical music performance regularly are **men**, 58% are **women** compared to 49.4% and 50.6% in the general population



3.3 Contemporary Dance

Contemporary Dance - by age group

48% of those who attend a contemporary dance performance regularly are **ABC1**. This compares to 41% of the total population.

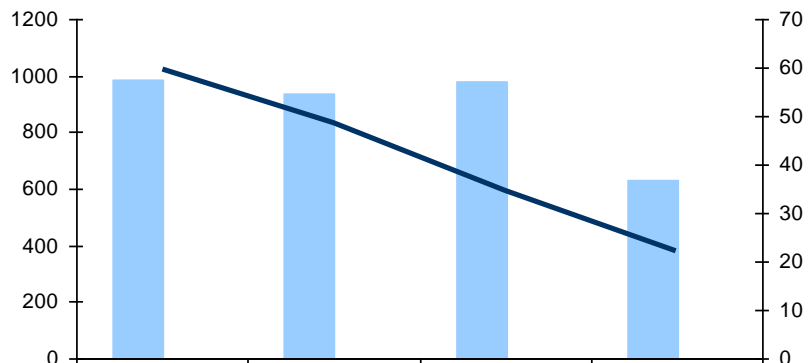


Total Pop	597	787	660	554	441	493
% of total in age group	17	22	19	16	13	14
Regulars	46	43	25	21	16	14
% of regulars in age group	28	26	15	13	9	8

The total adult population is 3.5 million and the number which attends contemporary dance performances is 165,000

Contemporary Dance - by region

34% of those who attend a contemporary dance performance regularly are **men**, 66% are **women**. This compares to 49.4% and 50.6% of the total population.

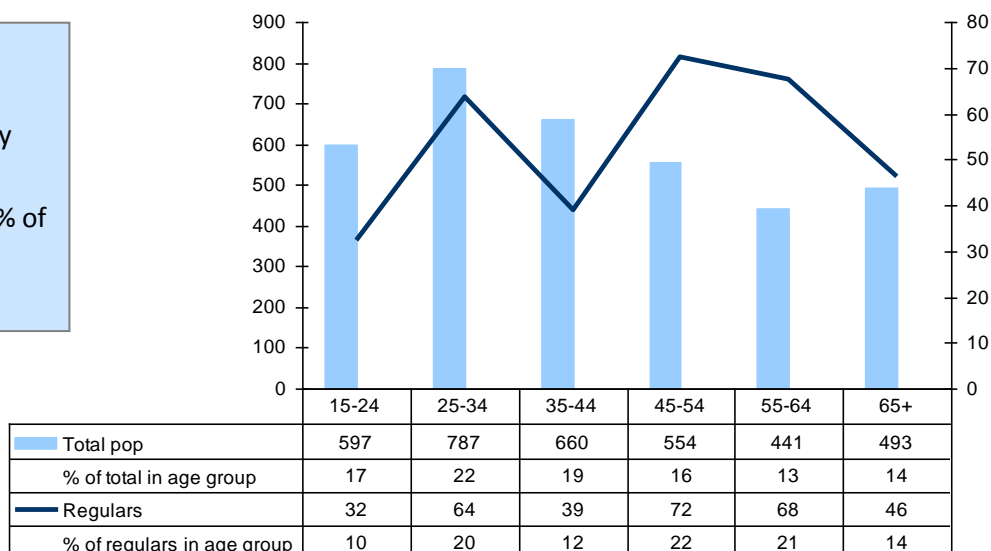


Total Pop	987	935	980	630
% of total pop in region	28	26	28	18
Regulars	60	49	35	22
% of regulars in region	36	29	21	13

3.4 Folk concerts

Folk concerts - by age group

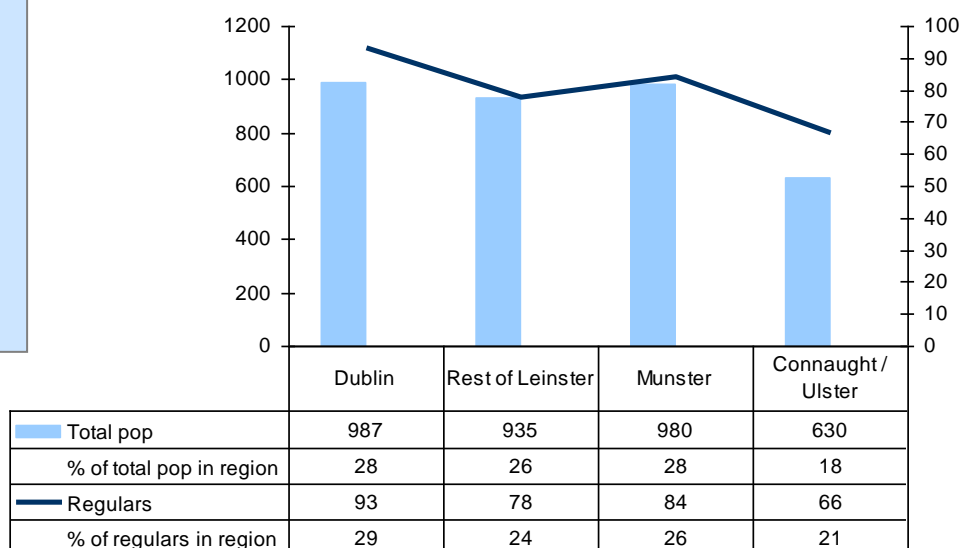
44% those who attend a folk concert regularly are **ABC1**, This compares to 41% of the total population.



The total adult population is 3.5 million and the number which attends folk concerts is 321,000

Folk concerts - by region

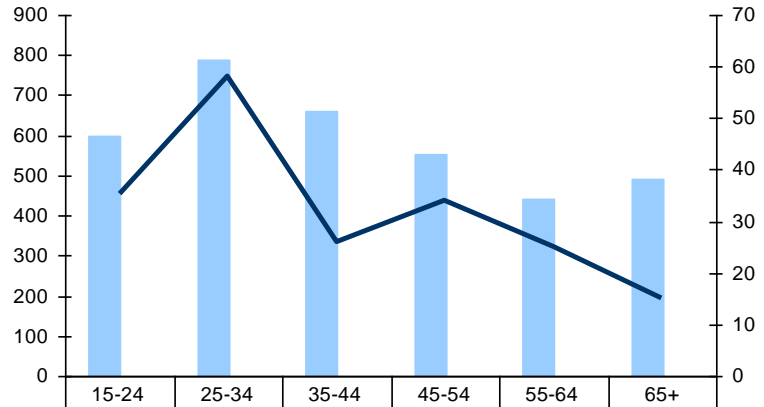
59% of those who attend a folk concert regularly are **men**, 41% are **women**. This compares to **49.4% and 50.6%** of the total population.



3.5 Jazz

54% of those who attend a jazz performance regularly are **ABC1**, This compares to 41% of the total population.

Jazz - by age group

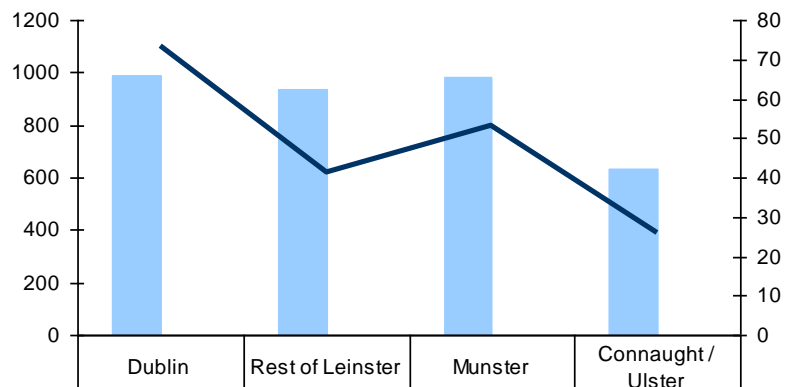


Total Pop	597	787	660	554	441	493
% of total pop in age group	17	22	19	16	13	14
Regulars	35	58	26	34	25	15
% of regulars in age group	18	30	13	18	13	8

The total adult population is 3.5 million and the number which attends jazz concerts is 194,000

59% of those who attend a jazz performance regularly are **men**, 41% are **women**. This compares to 49.4% and 50.6% of the total population.

Jazz - by region

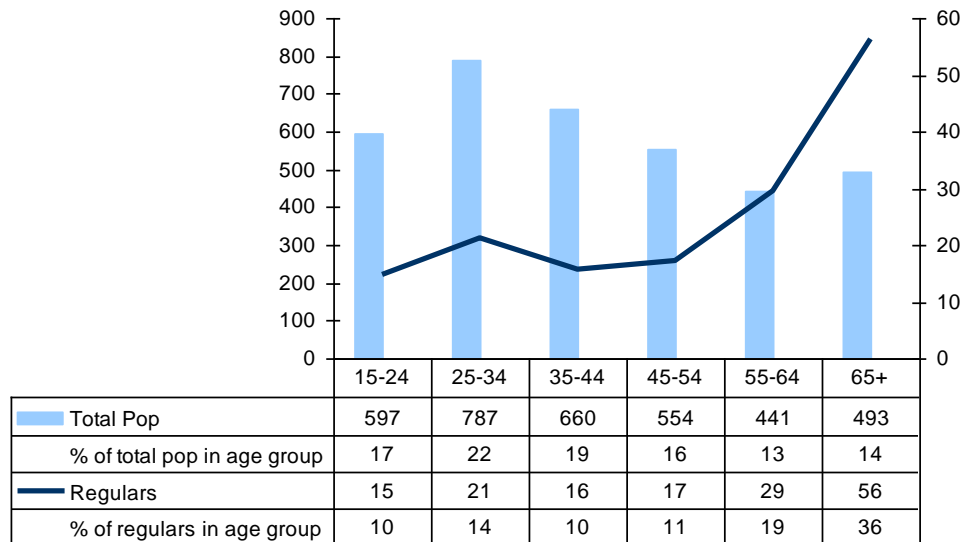


Total Pop	987	935	980	630
% of total pop in region	28	26	28	18
Regulars	73	41	53	26
% of regulars in region	38	21	27	13

3.6 Opera

59% of regular opera-goers are **ABC1**, This compares to 41% of the total population.

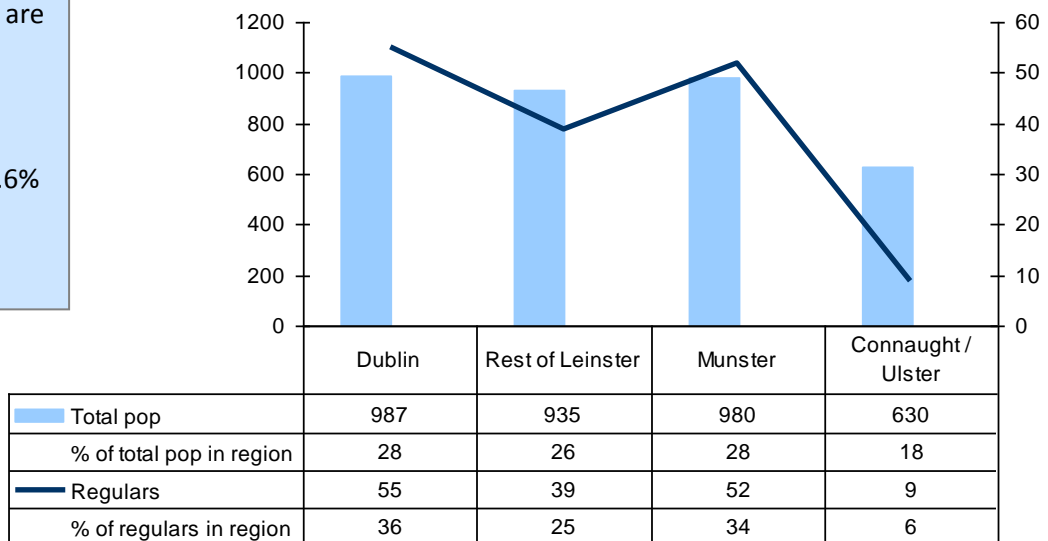
Opera - by age group



The total adult population is 3.5 million and the number who go to the opera is 155,000

43% of regular theatre-goers are **men**, 57% are **women**. This compares to 49.4% and 50.6% of the total population.

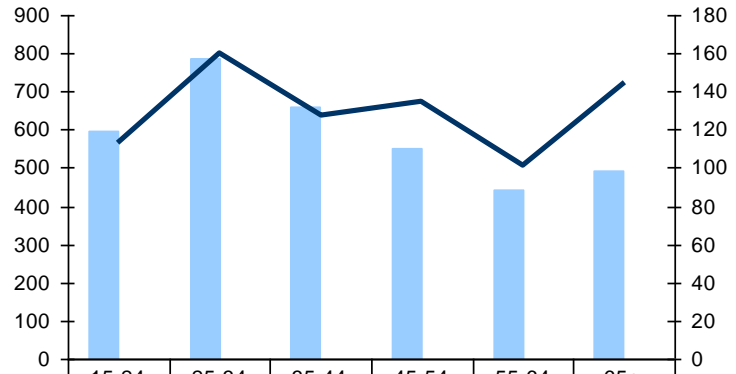
Opera - by region



3.7 Art Galleries

Art Galleries - by age group

57% of those who regularly visit art galleries are **ABC1**, This compares to 41% of the total population.

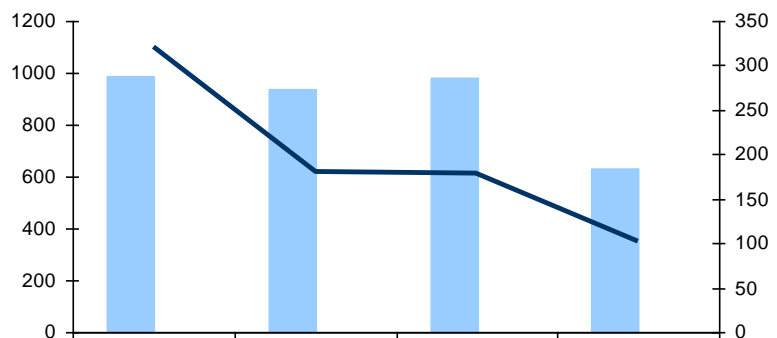


	15-24	25-34	35-44	45-54	55-64	65+
Total Pop	597	787	660	554	441	493
% of total pop in age group	17	22	19	16	13	14
Regulars	113	160	128	135	101	145
% of regulars in age group	14	21	16	17	13	19

The total adult population is 3.5 million and the number of people who visit art galleries is 782,000

43% of those who regularly visit art galleries are **men**, 57% are **women**. This compares to 49.4% and 50.6% of the total population.

Art Galleries - by region

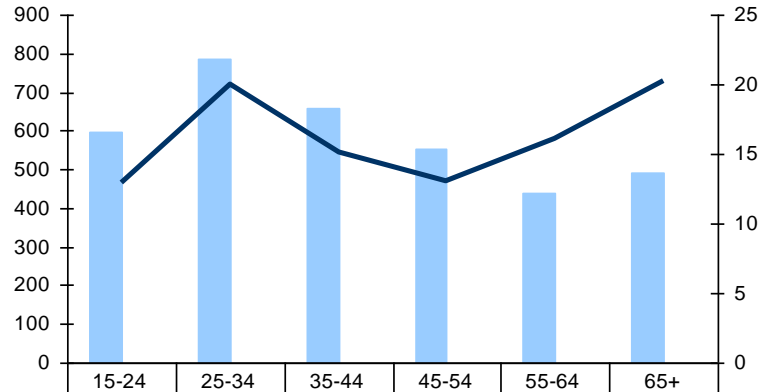


	Dublin	Rest of Leinster	Munster	Connaught / Ulster
Total Pop	987	935	980	630
% of total pop in region	28	26	28	18
Regulars	321	180	179	102
% of regulars in region	41	23	23	13

3.8 Ballet

Ballet - by age group

52% of those who regularly go to a ballet performance are **ABC1**, This compares to 41% of the total population.

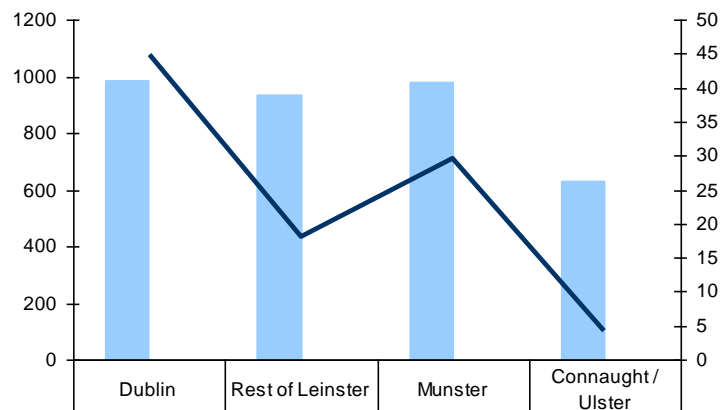


Total Pop	597	787	660	554	441	493
% of total pop in age group	17	22	19	16	13	14
Regulars	13	20	15	13	16	20
% of regulars in age group	13	21	16	13	17	21

The total adult population is 3.5 million and the number of people who go to a ballet performance is 97,000

Ballet - by region

36% of those who regularly go to a ballet performance are **men**, 64% are **women**. This compares to 49.4% and 50.6% of the total population.

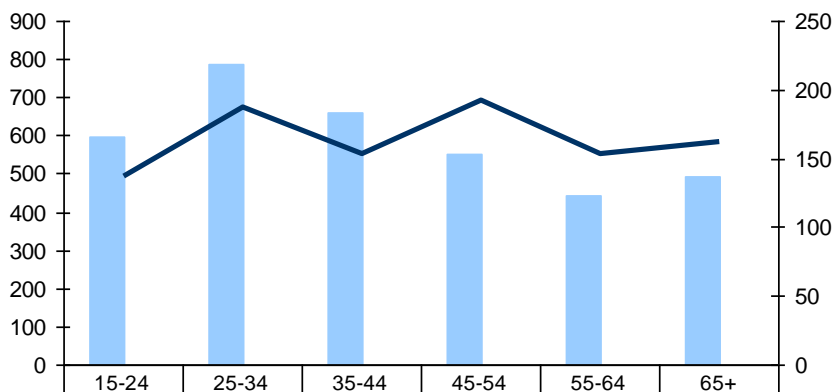


Total Pop	987	935	980	630
% of total pop in region	28	26	28	18
Regulars	45	18	30	4
% of regulars in region	46	19	31	4

3.9 Plays

Plays - by age group

50% of those who regularly go to a play are **ABC1**, This compares to 41% of the total population.

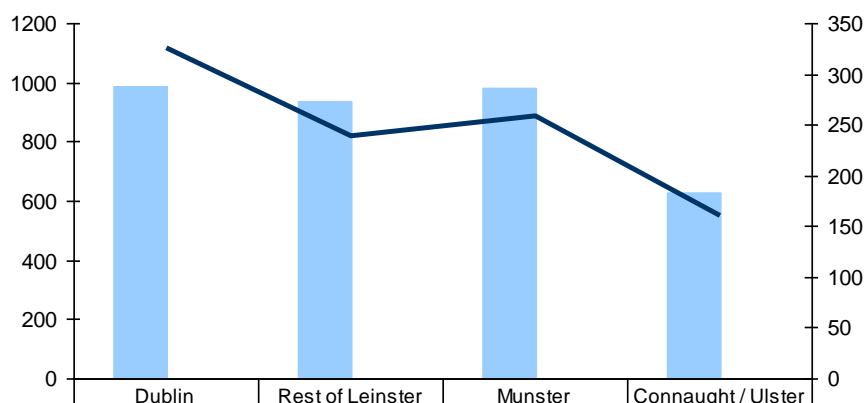


Total pop	597	787	660	554	441	493
% of total pop in age group	17	22	19	16	13	14
Regulars	137	187	153	192	153	162
% of regulars in age group	14	19	16	19	16	16

The total adult population is 3.5 million and the number of people who go to plays is 984,000

42% of those who regularly go to a play are **men**, 58% are **women**. This compares to 49.4% and 50.6% of the total population.

Plays - by region



Total pop	987	935	980	630
% of total pop in region	28	26	28	18
Regulars	325	240	258	160
% of regulars in region	33	24	26	16

Chapter 4: Profile of arts attendance in the regions

In this section of the report, we have broken arts attenders at all artforms into regions as follows:

Dublin all areas

Rest of Leinster

Munster

Connacht/Ulster

It is hoped that analysis from TGI can be used to build up a comprehensive picture of audiences which will be of direct use to arts organisations in a variety of ways.

TGI contains a wealth of information about audiences; the information contained in this report is intended as a first release of useful information. A further release will take place in July 2010 and Arts Audiences is actively seeking the input of arts organisations into the process to determine what would be of most concrete use. If you would like to know more about what TGI contains and to make a suggestion about what the second release of information should contain, log on to www.artsaudiences.ie and follow the links to TGI.

In this report, arts attenders at all artforms covered by the survey have been broken down by region. Demographic information by region is included.

In addition information has been extracted about each region's arts attenders media usage under a variety of headings. This enables us to see for the first time what media arts attenders consume.

WHAT CAN AN ARTS ORGANISATION DO WITH THIS INFORMATION?

This information is useful to arts organisations in a variety of ways.

- Marketing, including press and promotions
- Sponsorship and fundraising activities

The information contained in this report has been designed as a first profile of arts attenders by region and it highlights some differences between regions.

Arts organisations can use the demographic information to determine the age, urban/rural breakdown, lifestage (see appendix 1 for details of lifestage information) etc of attenders in the region

Arts organisations with the ability to profile their audience can compare this information with their own audience profile to highlight similarities or differences.

This information can be used in a wide variety of ways; it can be used to determine marketing spend e.g. to reach certain audiences through advertising in media which they consume. Where for instance a preponderance of attenders are urban rather than rural, consideration can be given to advertising on public transport or radio stations aimed primarily at urban dwellers.

In addition, in approaching media and other promotional partners for joint initiatives for example, arts organisations can use this information to outline the audiences which any promotion in the region may reach.

The media usage information on arts attenders should be examined in detail by arts organisations and contains a wealth of new information. This information can be of use not simply to determine marketing spend (although that information is key) but also press and promotions work. For example, the report shows that 24% of arts attenders in Dublin almost always or quite often read the quality GB Sunday Broadsheets compared to 19% of the population in Dublin (76% of adults in Dublin who almost always or quite often read the quality GB Sunday Broadsheets are arts attenders.

Arts organisations could use this information to try to achieve greater press coverage and/or promotions with these newspapers.

We have reported on behaviour by arts attenders in relation to their response to direct mail (please note direct mail is information or promotional materials personally addressed to them in the post): this information allows arts organisations to benchmark their own response rates against these but also allows much deeper understanding of how direct mail is responded to. For example, very high levels of attenders in all regions report that material received by direct mail is “kept for later use/reference”. Arts organisations should consider this in their design of direct mail, venue brochures etc.

We have included the information on whether arts attenders responded to a voucher or coupon in 08/09; this was the second highest category of response. In September 2010 when the 09/10 information becomes available it will be compared to 08/09 to determine whether the economic climate has meant that response rates to vouchers/coupons have changed.

The reports show that the majority of arts attenders log onto the internet every day or almost every day and certain specified websites have been selected and reports run on whether arts attenders log on to these websites regularly. This information is key for online marketing and promotions. If you would like information about other websites, particularly those which accept advertising, we can include this information in the next release in July 2010 if it is available. When the 09/10 information is reported in September 2010 we will report on changes and increases in usage – Facebook for instance having put on many hundreds of thousands of users in Ireland in 2010 may become much more important for the arts in marketing terms. (Go to www.facebakers.com for up-to-date information).

The survey indexes people against their behaviour and in the second release of information we hope to profile arts attenders in more detail and to provide arts organisations with richer information in relation to their specific consumption of media compared to the general population.

SPONSORSHIP AND FUNDRAISING

Because the Target Group Index is a single source of information about people and their behaviour, it is possible to cross-reference information about arts attenders (or attenders at a particular artform) with their use of brands and their consumer behaviour.

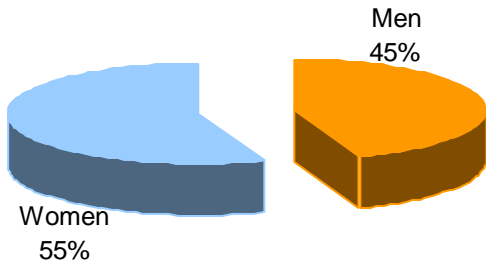
For example, it is possible to identify the brands that attenders at a specific artform are likely to consume.

This means for example that if an arts organisation is making a sponsorship pitch to a commercial company, if that company is covered by the survey we can calculate the likelihood that there is a commonality between the arts organisation and the product or company. If companies are interested in reaching certain audiences (female, ABC1, etc) we can profile for the benefit of arts organisations what their likely audience reach is. More details will be provided on how this can work in early July. Check out www.artsaudiences.ie for updates.

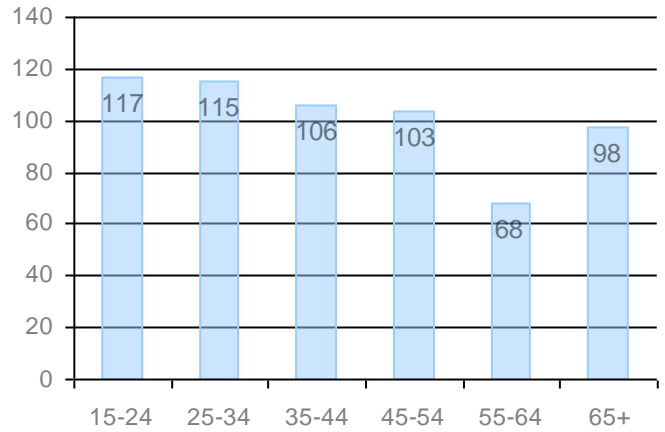
4.1.1 Dublin: demographic information

Dublin arts attendees: 607,000

Dublin arts attendance by gender



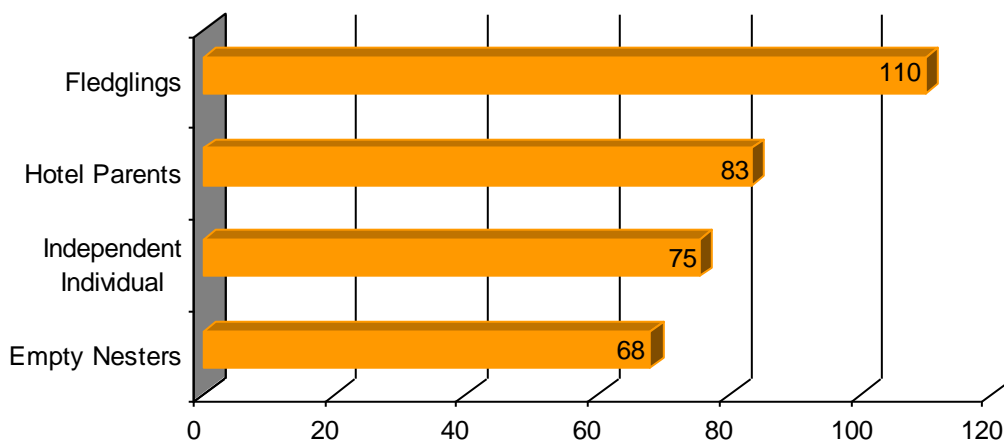
Dublin - by age group (thousands)



Social Class:

Of those Dublin arts attendees, 62% were ABC1 and 38% were C2DE

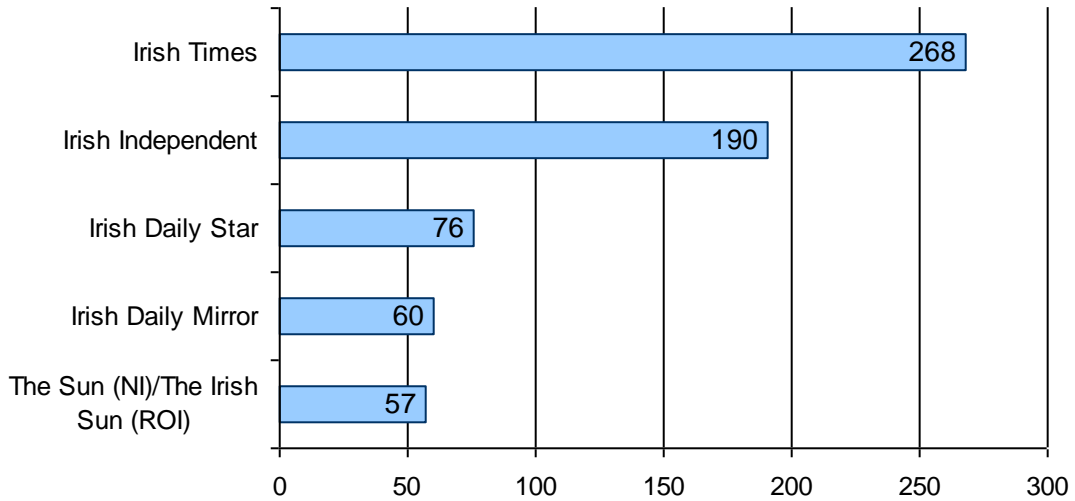
Arts attenders in Dublin - lifestages (000's)



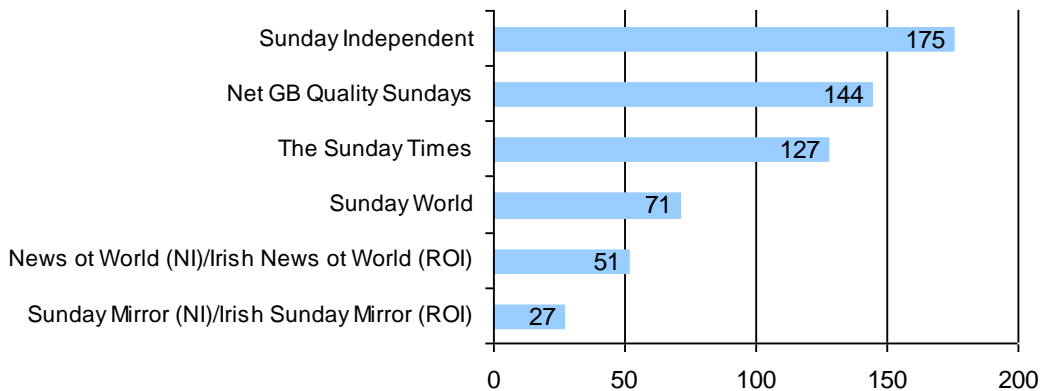
4.1.2 Dublin: media usage

Dublin arts attendees:
607,000

Daily newspaper readership (almost always & quite often)
(000's)

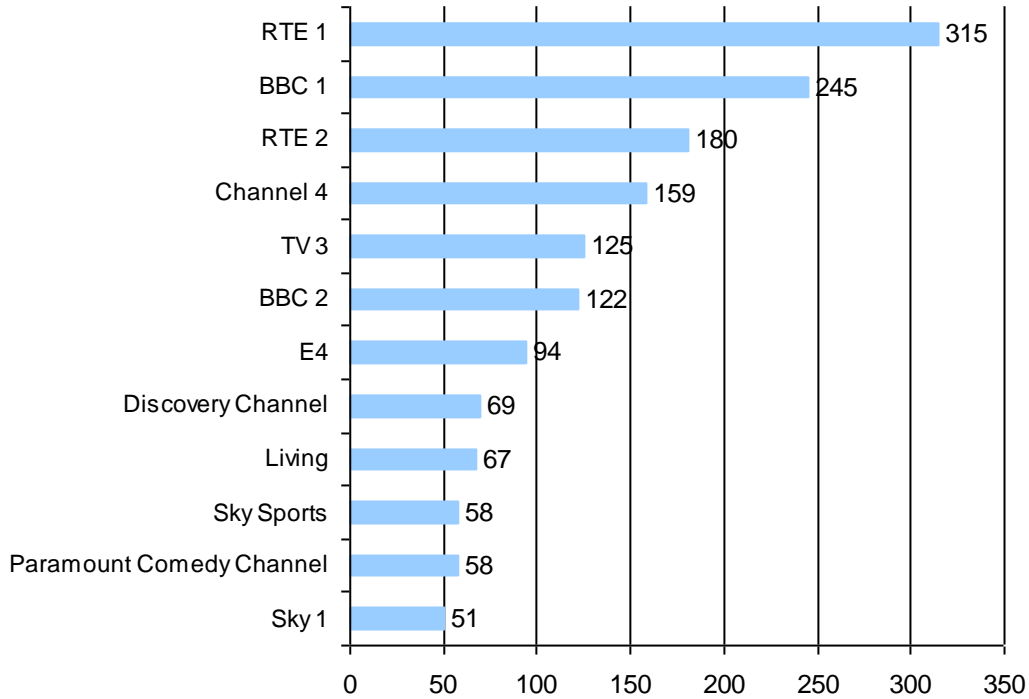


Sunday newspaper readership (almost always & quite often)
(000's)

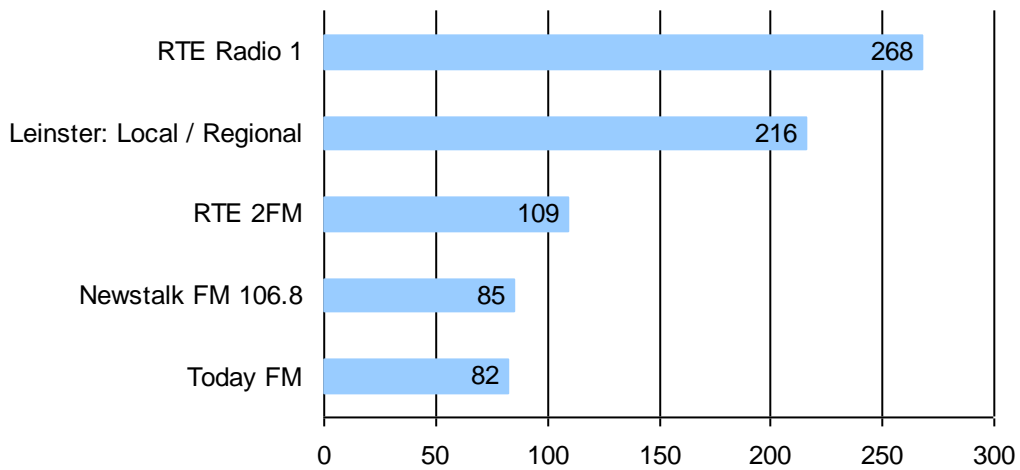


Dublin arts attendees: 607,000

Favourite TV channels (1st, 2nd and 3rd choices amalgamated) (000's)

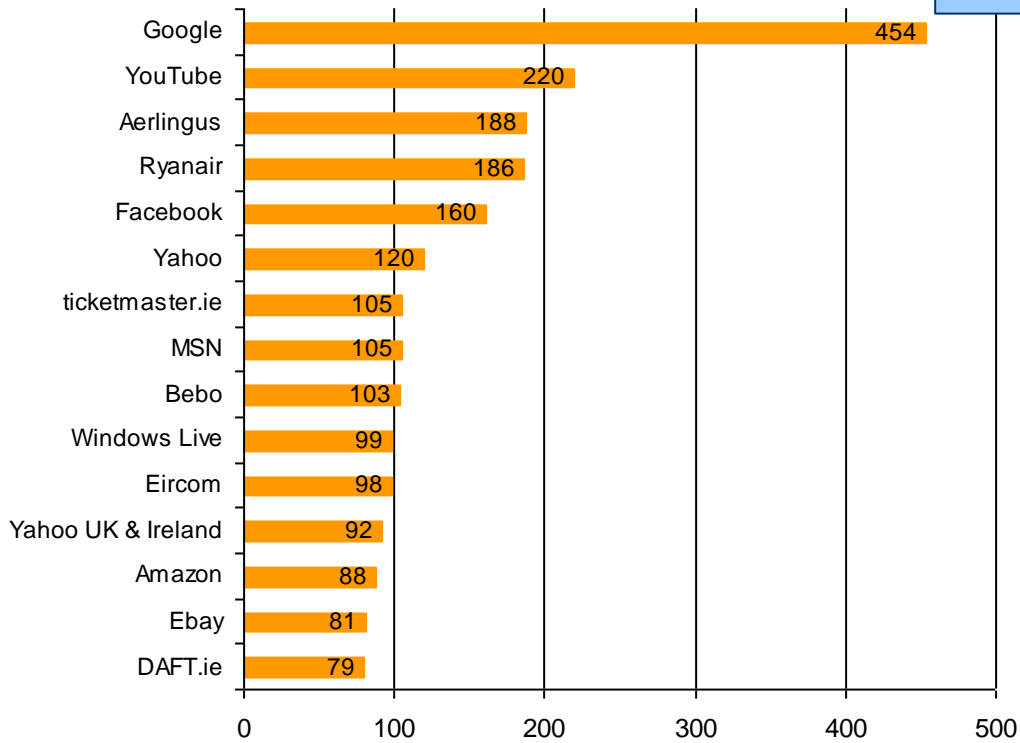


Radio stations listened to yesterday (000's)

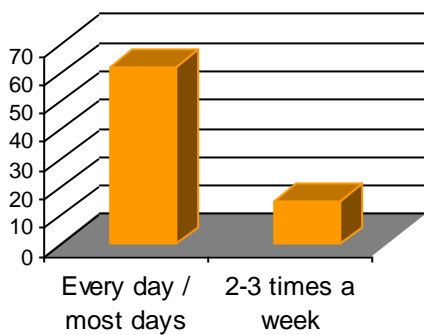


**Dublin arts attendees:
607,000**

Internet sites visited regularly (000's)



How often do you access the Internet? (%)



Direct Mail:

Amongst Dublin arts attendees who received direct mail in the last 12 months:

- 17% bought or ordered something
- 14% used a voucher or coupon they received

A significant number also kept the direct mail for later use or reference.

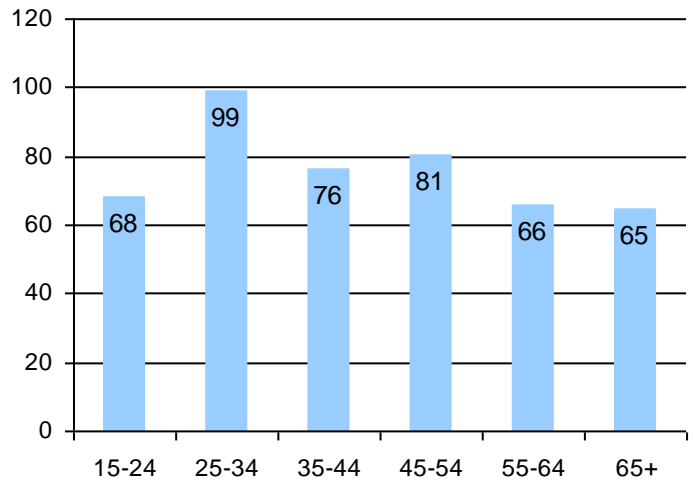
**Rest of Leinster
arts attendees:
454,000**

4.2.1 Rest of Leinster: demographic information

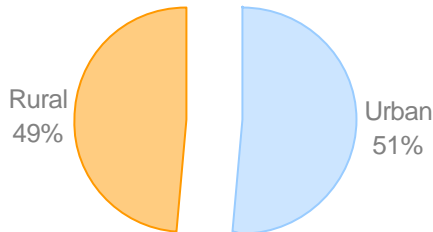
Rest of Leinster: by gender



Rest of Leinster - by age group

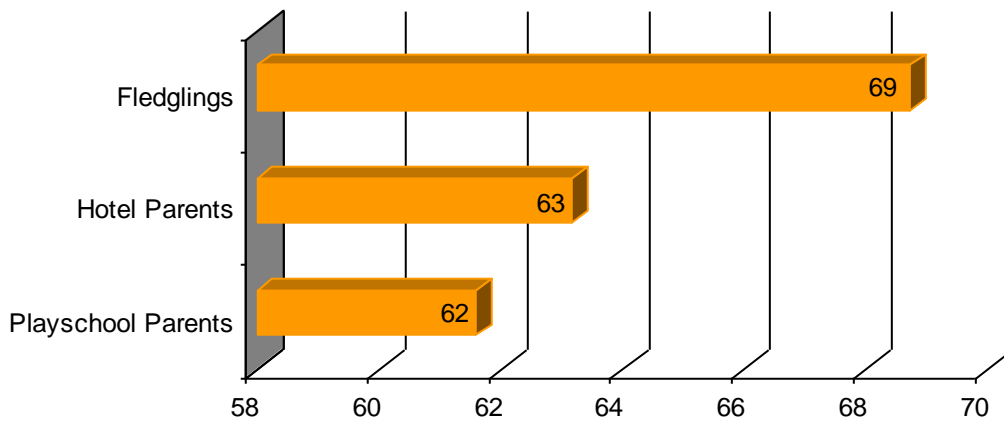


Do you live in an urban or rural area? (%)



Of those arts attendees in the Rest of Leinster, 45% were ABC1 and 42% were C2DE

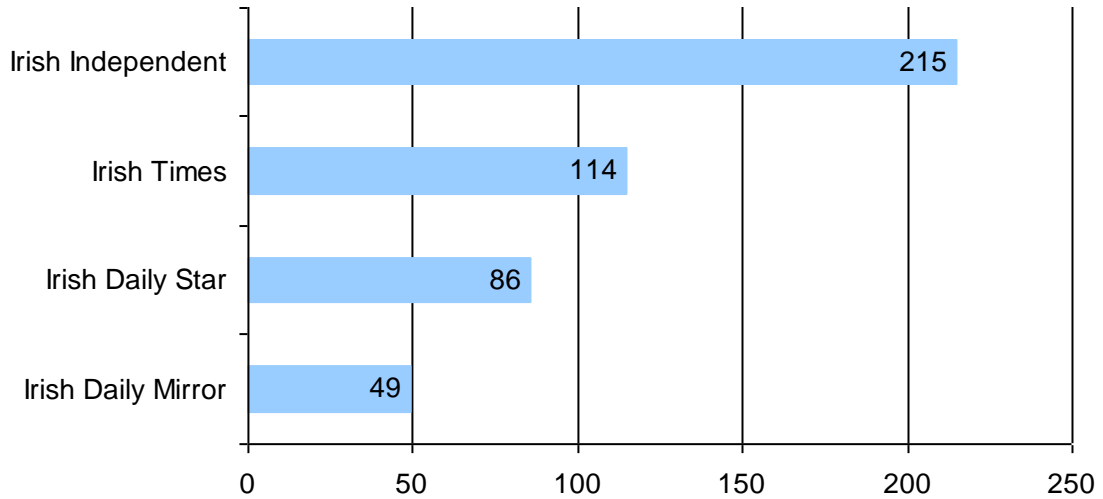
Arts attenders in Rest of Leinster: Lifestages (000's)



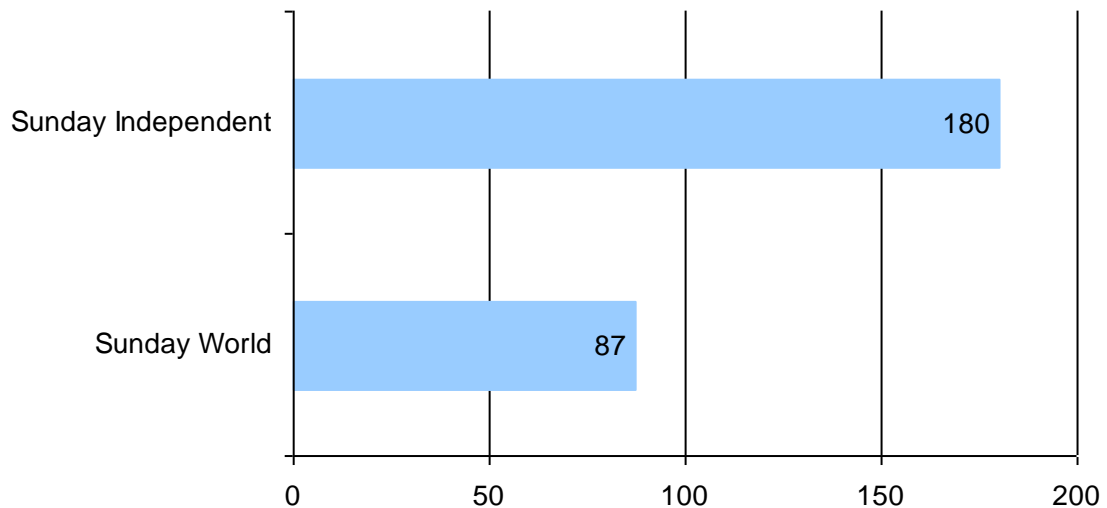
**Rest of Leinster
attendees:
454,000**

4.2.2 Rest of Leinster: media usage

**Daily newspaper readership (almost always & quite often)
(000's)**

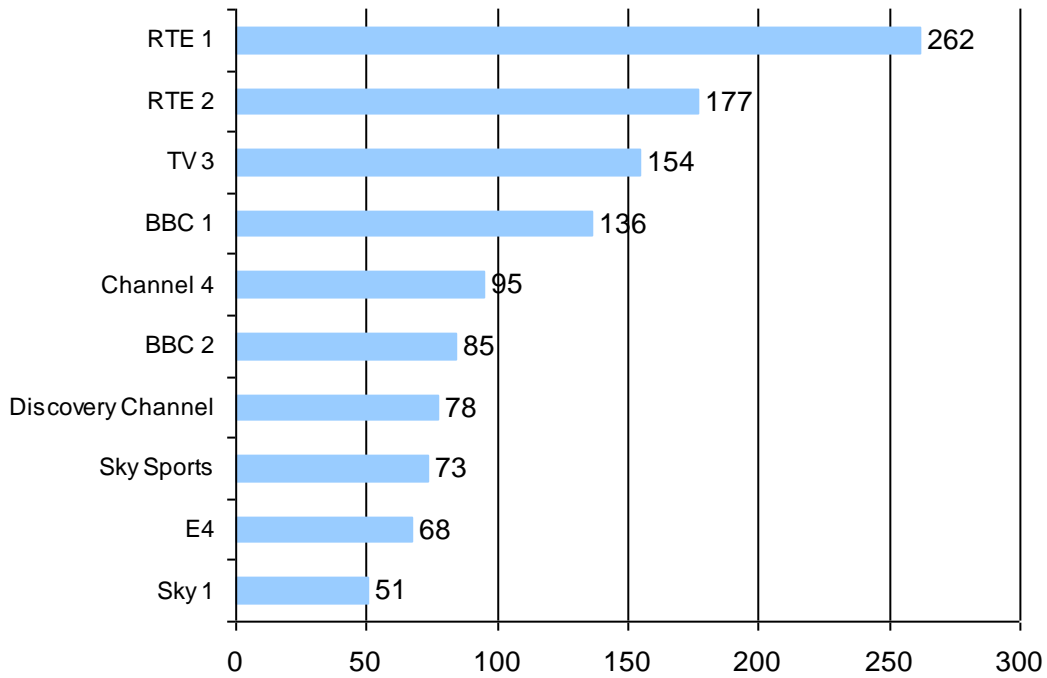


Sunday newspaper readership (almost always & quite often) (000's)

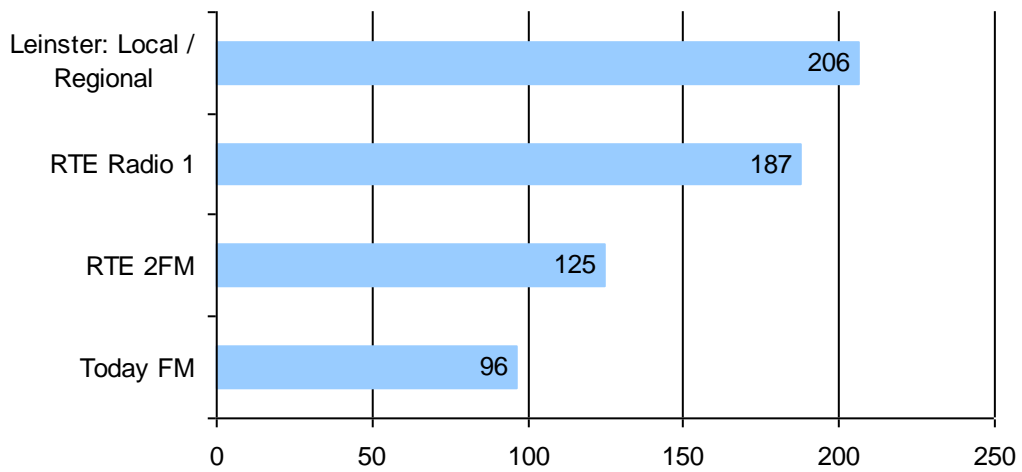


**Rest of Leinster
arts attendees:
454,000**

**Favourite TV channels (1st, 2nd and 3rd choices
amalgamated) (000's)**

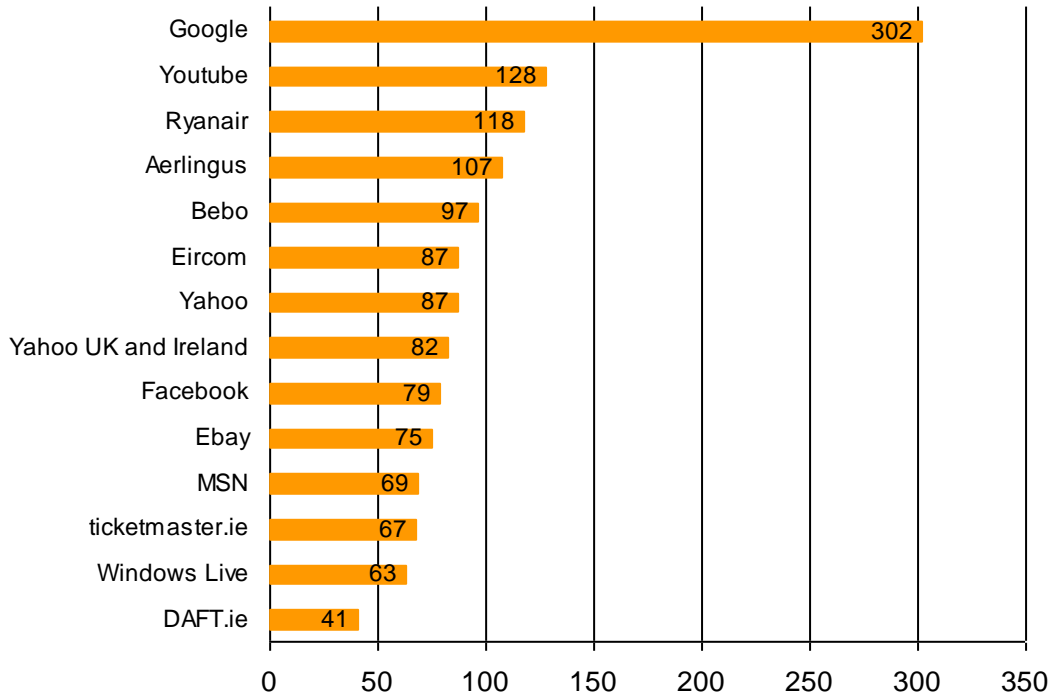


Radio stations listened to yesterday (000's)

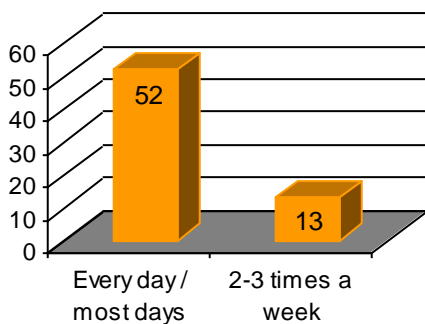


**Rest of Leinster
arts attendees:
454,000**

Internet sites visited regularly (000's)



**How often do you access the Internet?
(%)**



Direct Mail:

Amongst arts attenders in the Rest of Leinster who received direct mail in the last 12 months:

- 19% bought or ordered something
- A significant number also used a voucher or coupon they received or kept the direct mail for later use or reference.

Munster arts attendees: 478,000

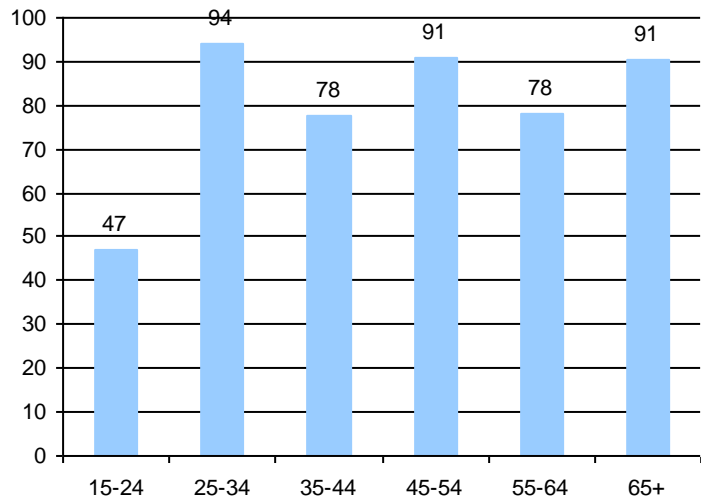
4.3.1 Munster: demographic information

Munster attendance by gender

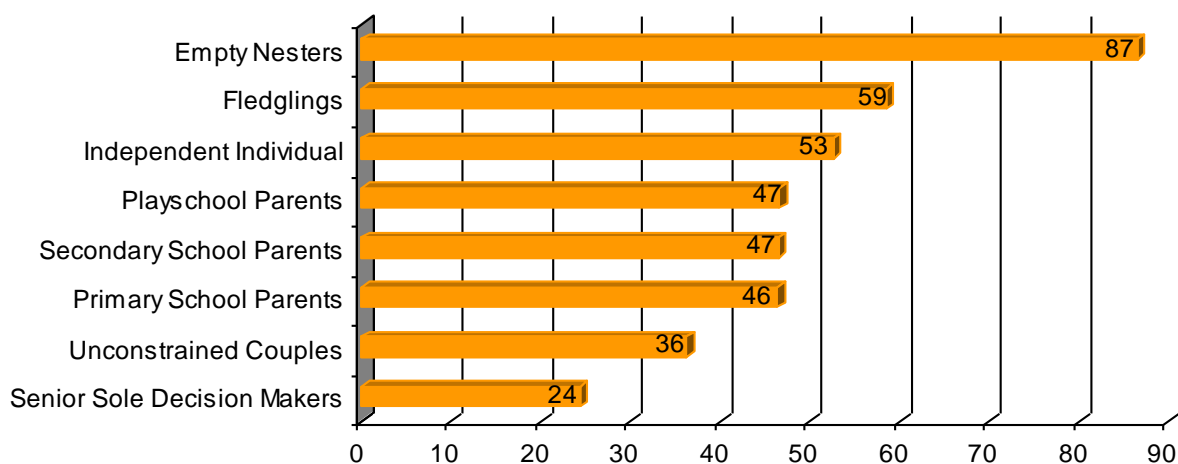


Of those arts attenders in Munster, 42% were ABC1 and 46% were C2DE

Munster by age group (thousands)



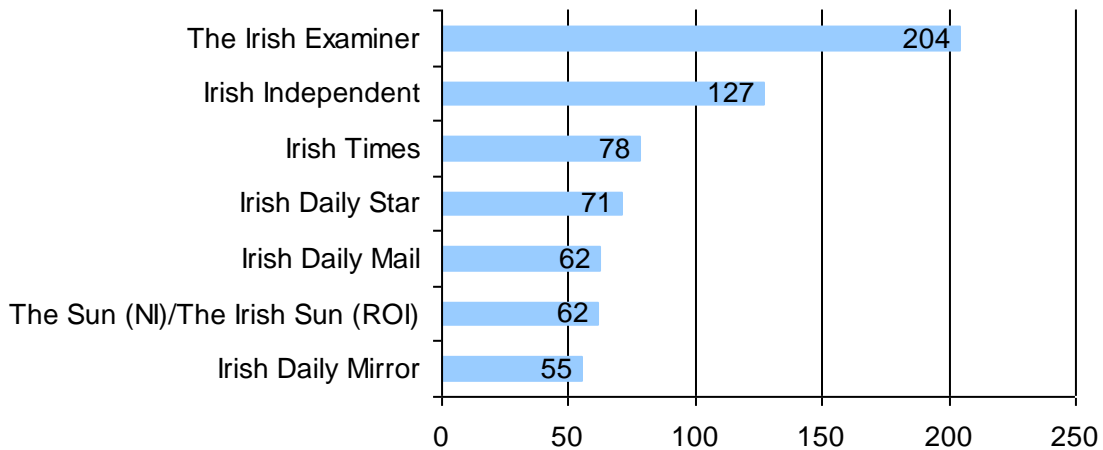
Arts attenders in Munster: Lifestages (000's)



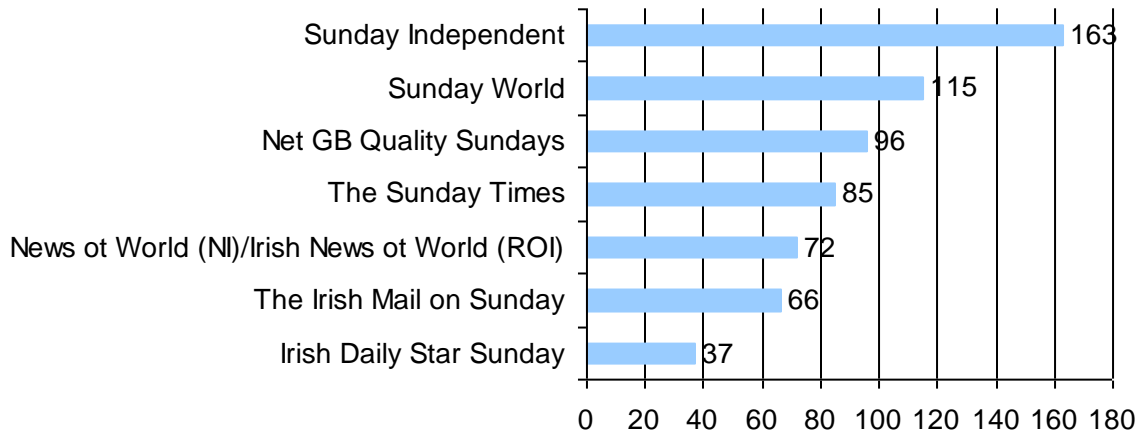
Munster arts attendees: 478,000

4.3.2 Munster: media usage

Daily newspaper readership (almost always & quite often) (000's)

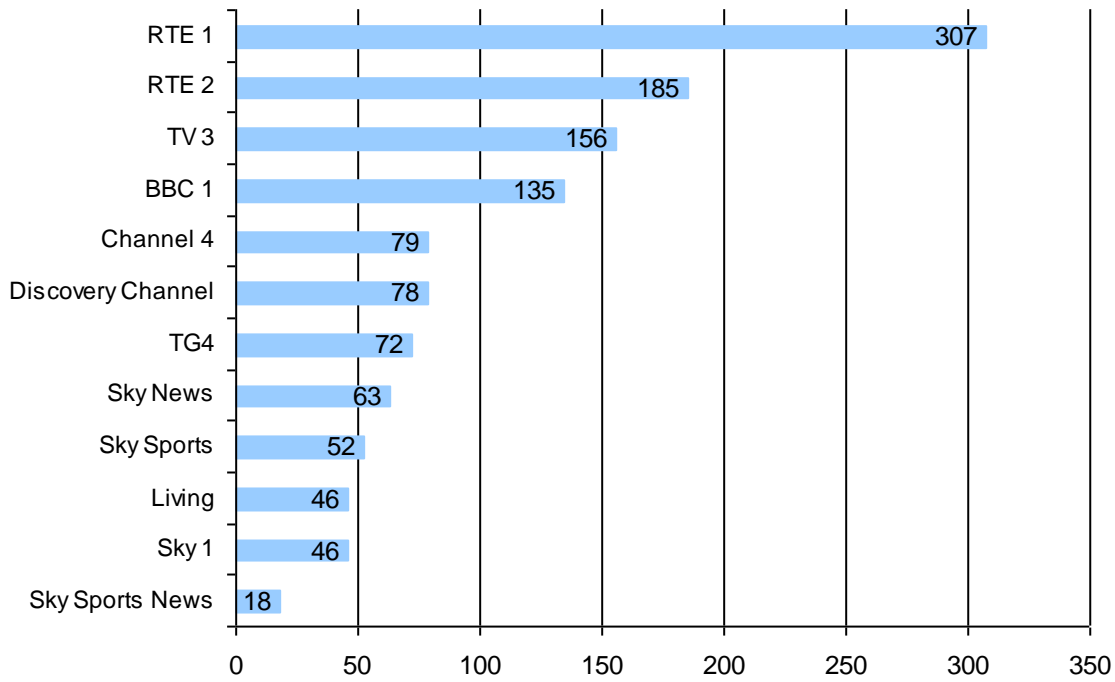


Sunday newspaper readership (almost always and quite often) (000's)

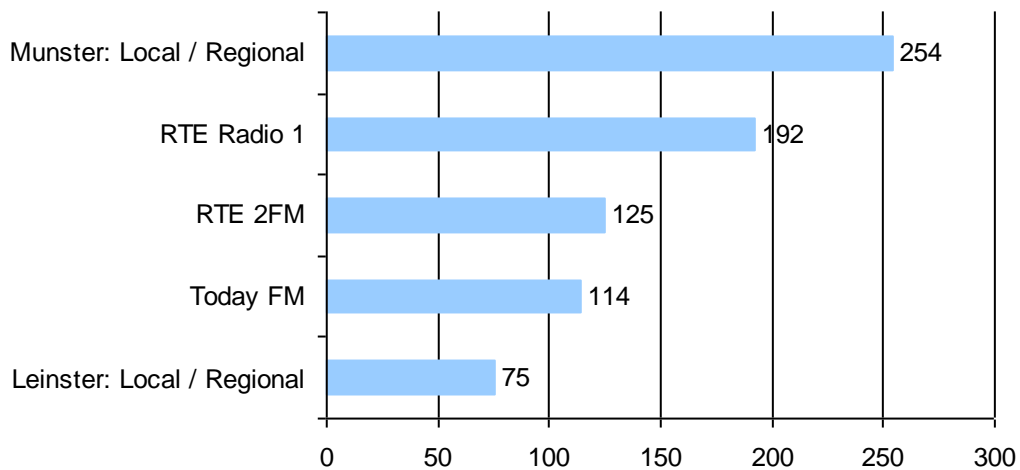


**Munster arts
attendees:
478,000**

**Favourite TV channels (1st, 2nd and 3rd choices
amalgamated) (000's)**

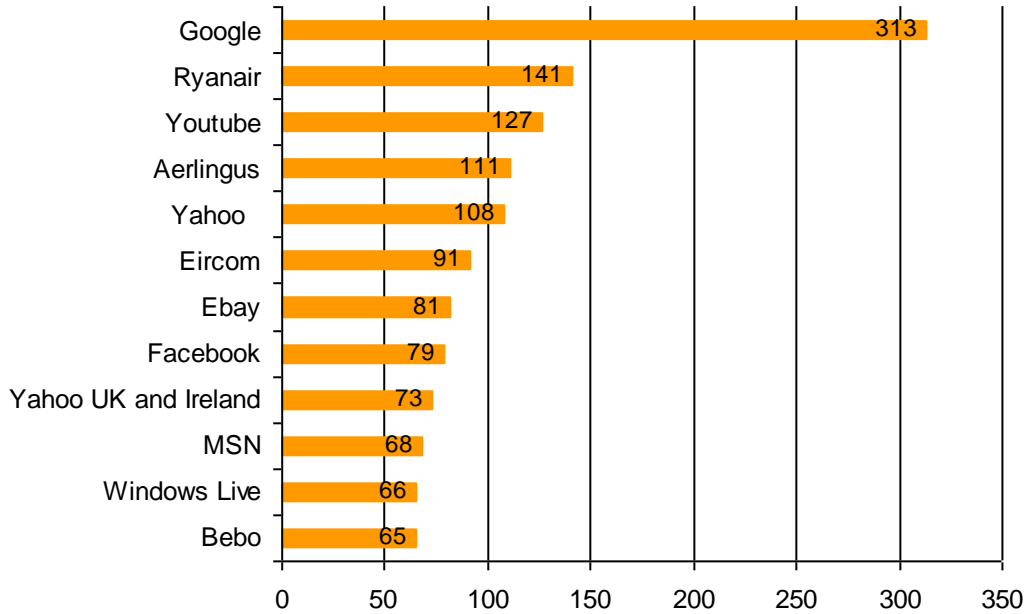


Radio stations listened to yesterday (000's)

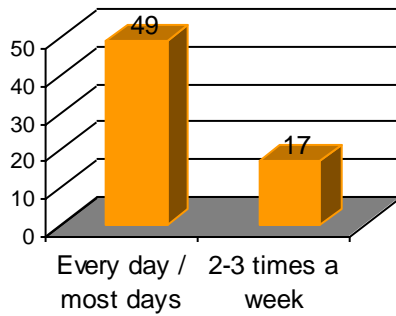


**Munster arts attendees:
478,000**

Internet sites visited regularly (000's)



How often do you access the Internet? (%)



Direct Mail:

Amongst arts attenders in Munster who received direct mail in the last 12 months:

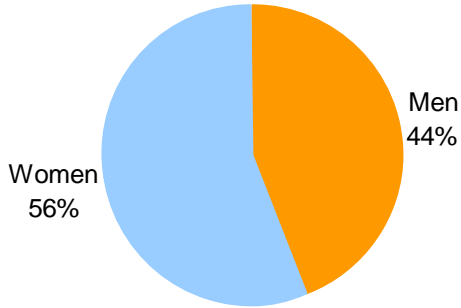
- 21% bought or ordered something
- 14% used a voucher or coupon they received

A significant number also kept the direct mail for later use or reference.

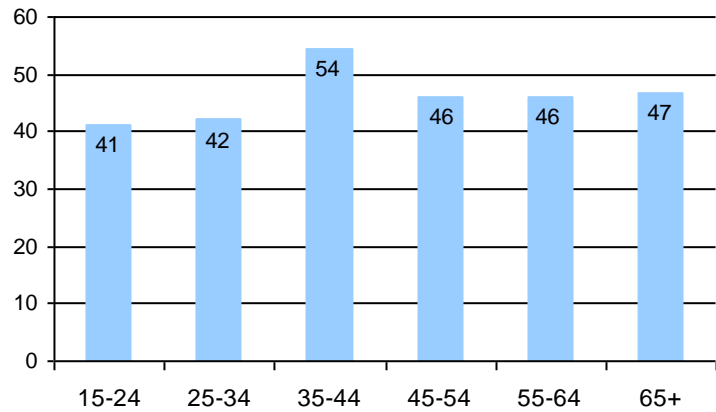
4.4.1 Connaught/Ulster: demographic information

**Connaught/
Ulster arts
attendees:
277,000**

Attendance by gender



Attendees by age group (thousands)



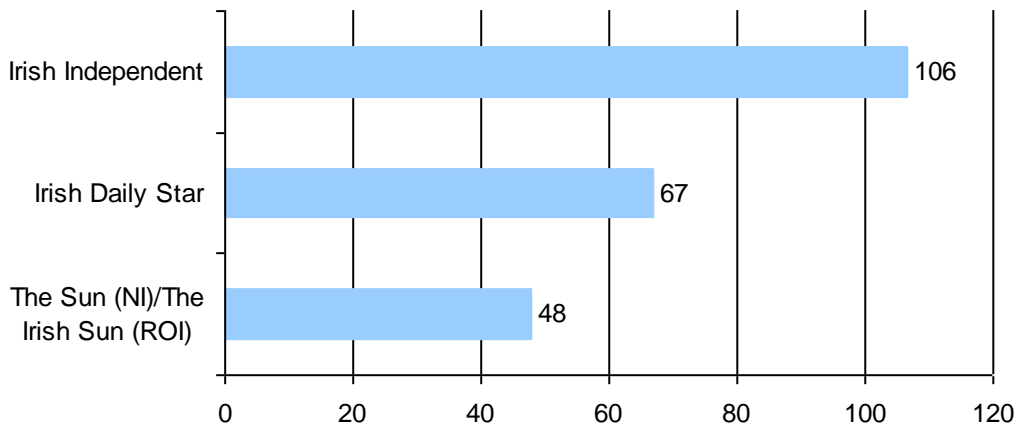
Of those arts attenders in Connaught/Ulster, 42% were ABC1 and 46% C2DE

Note: sample sizes for life stages of attenders in Connaught / Ulster were too small to allow for meaningful analysis.

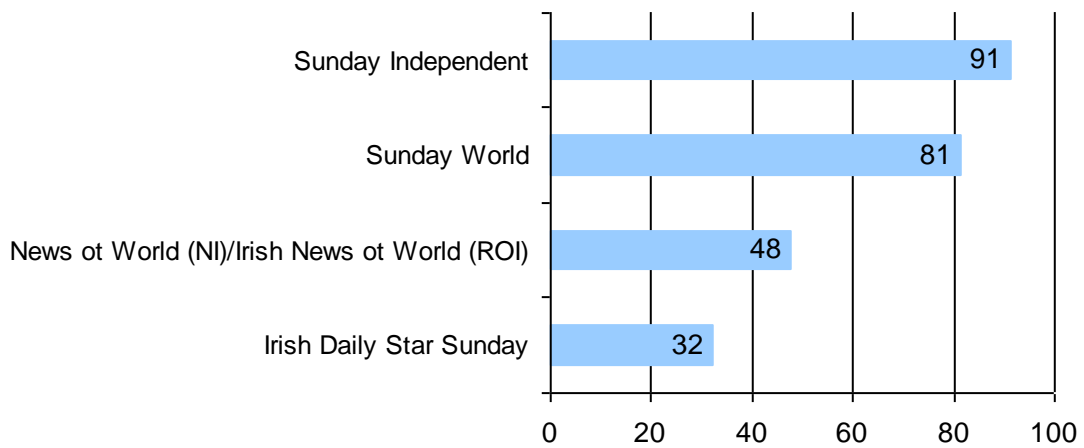
4.4.2 Connaught/Ulster: media usage

**Connaught/
Ulster arts
attendees:
277,000**

Daily newspaper readership (almost always & quite often) (000's)

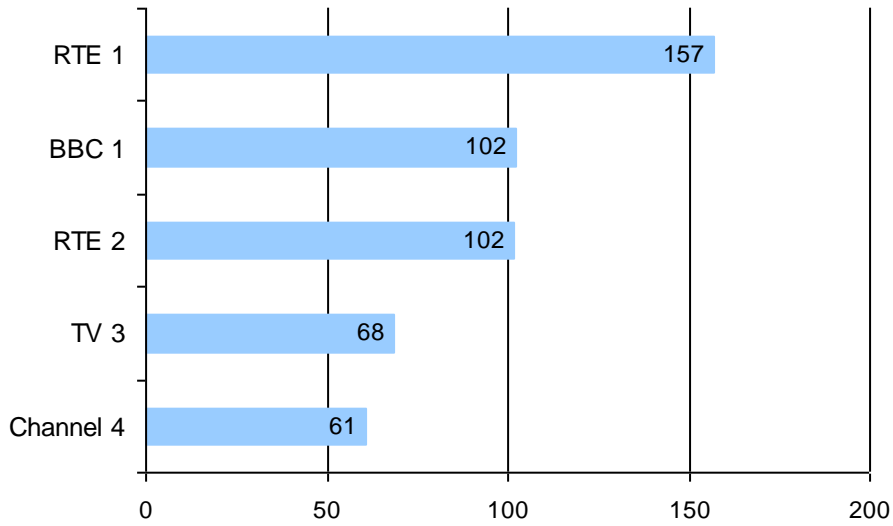


Sunday newspaper readership (almost always & quite often) (000's)

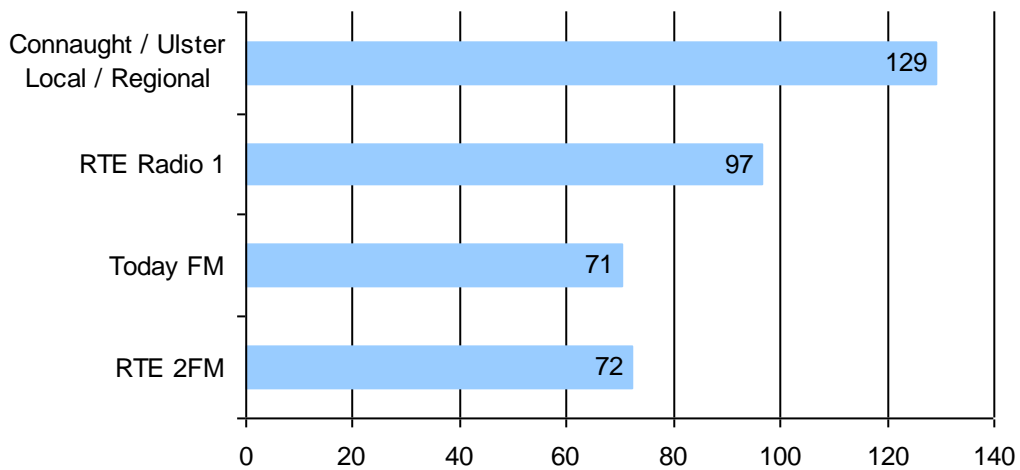


**Connaught/
Ulster arts
attendees:
277,000**

Favourite TV channels (1st, 2nd and 3rd choices amalgamated) (000's)

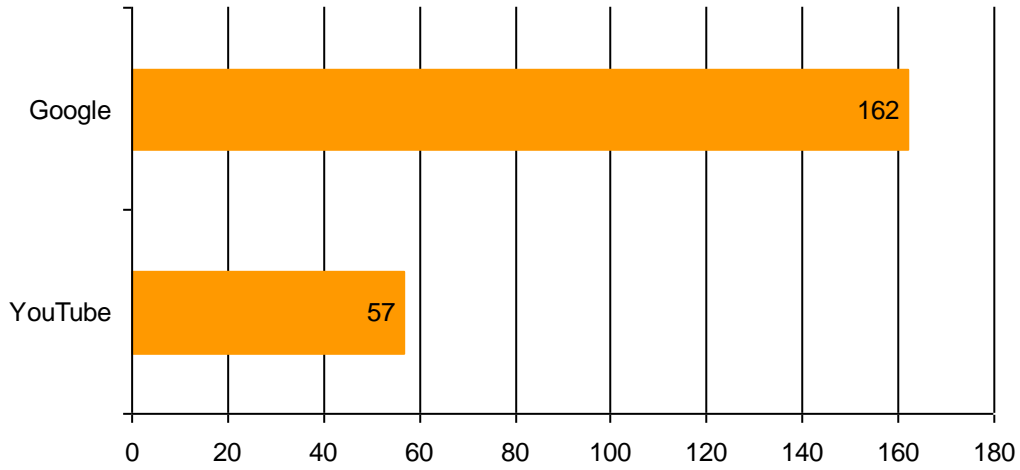


Radio stations listened to yesterday (000's)

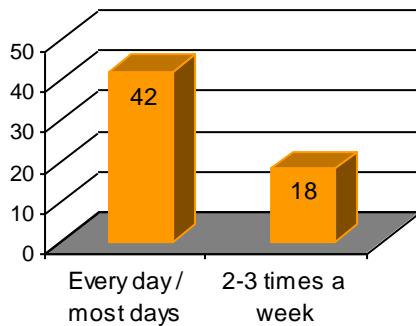


**Connaught/
Ulster arts
attendees:
277,000**

Internet sites visited regularly (000's)



How often do you access the internet? (%)



Direct Mail:

Amongst arts attenders in Connaught / Ulster who received direct mail in the last 12 months:

- 20% bought or ordered something
- 12% used a voucher or coupon they received

A significant number also kept the direct