**The Arts in Irish Life**
2016 Research Update

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# Executive Summary

## 1.1 Introduction and Objectives

The Arts in Irish Life: 2014 report[[1]](#footnote-1) and The Arts in Irish Life: 2015 update detailed the results of market research for the Arts Council into levels of public engagement with the arts.

Their findings were derived from questions incorporated into Kantar Media’s TGI study.[[2]](#footnote-2) These questions sought to capture information on patterns of attendance, participation and attitudes of the Irish adult population. Since this study runs on a repeating annual basis, the Arts Council is now able to receive an up-to-date snapshot of the art landscape, including new elements that were not reported in the past. As a result, the intention of this short update is to offer interested parties:

* A reminder of the summary of key 2014 and 2015 results in terms of arts attendance and behaviour
* New analysis from the 2016 TGI survey
* Geographical breakdown of arts attenders (see definition in appendix)
* The setting and sources of information for arts attenders
* Detailed analysis of a number of artforms
* Communities for whom access to the arts is difficult – factors of impact.

## 1.2 Data Sources and Referencing

As noted above, the AILF: 2014 report was based upon the results of the TGI 2014 study and AILF: 2015 update based on the results of the TGI 2015 study.[[3]](#footnote-3) The latest update is based on the results of the TGI 2016 study.[[4]](#footnote-4) As such, comparisons are between:

TGI 2014: Fieldwork between October 2013 and March 2014 Results from 2,971 adults (15+)

TGI 2015: Fieldwork between October 2014 and March 2015 Results from 3,008 adults (15+)

TGI 2016: Fieldwork between October 2015 and March 2016 Results from 3,002 adults (15+)

Fuller methodological detail regarding the AILF: 2014 TGI study is provided in the appendix to the original report. Further information related to the methodology of the TGI 2016 can be made available on request.

In the below report, all figures relate to the ‘all adult’ population (aged 15 or over) unless stated otherwise.

This report was produced in June 2017 by Kantar Media on behalf of the Arts Council. The brief for the report was supplied to Kantar Media Ltd by the Arts Council based on internal discussion and consultation in relation to useful material for internal use. Any queries on the brief should be addressed to the Audience Adviser of the Arts Council.

# Reminder of the Main Findings of AILF 2014 and 2015

## 2.1 Arts Attendance

* According to AILF 2015, 64% of the population had attended any arts event[[5]](#footnote-5) within the preceding twelve months. This compared very favourably to other geographies, with Northern Ireland recording a figure of 47% annual attendance and Great Britain a figure of 45%.
* In AILF 2015 a significant 22% of adults attended an Irish/traditional-art event (whether dance or music). ‘Traditional/folk dance’ represents the most popular form of dance event to attend. ‘Traditional Irish or folk music’ events rank second only to ‘rock or pop’ events in terms of popularity (19.5% attendance versus 21.5% in the case of ‘rock or pop’ events).
* According to AILF 2015, almost one in five adults (19%) attended an arts event ‘once a month or more’ in the last year. A total of almost two in five adults (39%) indicated that they had attended an event ‘once every three months or more often’. This group was well balanced in terms of gender profile (only 4% more likely to be female), but exhibited some bias towards higher social-grade bands (25% more likely to be AB than the general population).

## 2.2 Factors Impacting Arts Behaviours

* Reminding ourselves of the AILF 2014, a strong correlation was observed between the proportions of an individual’s family or friends attending arts events and that same individual’s own weight of personal arts attendance. Those amongst whom ‘all/most’ family members attend similar events will themselves be 201% more likely to be in the heaviest personal arts-attendance category (attending events once a month or more often).
* In AILF 2014, 29% of the population indicated some difficulties attending or taking part in those arts activities that interested them. Although ‘Can’t afford/cost’ was indicated as the most significant difficulty, only 8% of all those reporting difficulties indicated that the only factor affecting their engagement was cost.

## Arts Participation

* In AILF 2015, levels of participation (see definition in appendix) in ‘artistic or creative activities’ remained high amongst the Irish population. 19% of respondents identified themselves as regular participants in such activities (18%: 2014) whilst a total of 35% indicated any regular or occasional participation6 (36%: 2014).
* According to AILF 2015, the levels of regular participation in ‘artistic or creative activities’ had seen an increase for the youngest age groups between 2014 and 2015. Specifically – amongst 15s–24s – any regular participation had increased from 25% to 30%. This increase was not attributable to a specific uplift in any one activity, but, instead, seemed well balanced across all measured activity types.
* The proportion of the population who consider themselves to be ‘creative’ continued to fall in AILF 2015. Specifically, only 46% agreed with the statement that they thought themselves creative in 2015 – down from 48% in 2014 and 58% in 2013. Of those who are regular participants in artistic or creative activities, interestingly only two thirds (66%) agreed with this statement.
* In AILF 2014, our reporting identified a strong correlation between levels of participation in the arts and levels of attendance of arts events (i.e. it is more probable that an individual will attend arts events if also a participant, and vice versa). Regular participants in the arts are 106% more likely than an average adult to also be in the heaviest category of arts attender (attending events once a month or more often).

## 2.4 Attitudes Towards the Arts

* The AILF 2015 results highlighted that a majority of the public believed that the arts played a positive role in Irish public life. 66% of respondents agreed with the statement that ‘The arts play an important and valuable role in a modern society such as Ireland’ (68%: 2014). Similarly, 80% agreed that ‘Arts activity helps to bring visitors and tourists to Ireland’ (82%: 2014).
* The AILF 2015 results confirmed the public’s view that government funding to the arts should be maintained. 59% agreed that ‘even in current economic circumstances local authorities and central government should maintain their level of funding to the arts’. This proportion had increased from 57% in 2014. This support for arts funding was strong across all groups engaging with the arts. Whilst 78% of heavy arts attenders (attending events once a month or more often) endorsed this statement, a 53% majority of lighter attenders also took this position.
* As in 2014, the AILF 2015 results suggested that not all who indicate that the ‘arts do not play a significant part in my life’ are disengaged from attendance at arts events. 39% indicated that ‘the arts do not play a significant part in my life’ (40%: 2014). However, in practice only 24% of this group never attend any arts events at all.
* One shift of note between the AILF 2014 and AILF 2015 results related to the attitudinal profile of 15s–24s relative to the general population. In particular, 2015 saw a lower proportion asserting the relative value of the arts versus other fields of participation – for example, 48% of 15s–24s agreed that ‘As much importance should be given to providing arts amenities as is given to providing sports amenities’, versus 55% in the preceding year.

# Findings from the 2016 TGI Survey

## 3.1 Geographical Breakdown of Arts Attenders by Region

Table 3.1.1 outlines the geographical breakdown of arts attenders by region. Dublin is the region with the highest proportion of arts attenders, with three in ten arts attenders being found there. Two in ten are located on the east coast (representing the second biggest region for arts attenders).

**Table 3.1.1** Geographical Breakdown of Arts Attenders vs Irish Population by Region

|  |  |  |  |
| --- | --- | --- | --- |
|  | Irish population |  | Arts attenders |
| ROI regions | **%** |  | % |
| Dublin | 29 |  | 31 |
| North-west | 9 |  | 9 |
| East coast | 19 |  | 18 |
| South-east | 10 |  | 10 |
| South-west | 13 |  | 13 |
| West | 8 |  | 8 |
| Shannonside  | 12 |  | 10 |

*TGI base: Irish population: All adults, 15*+*, arts attenders. ROI regions breakdown based on TGI’s tourist regions/areas*

Based on the distribution of arts attenders by age and social grade in Table 3.1.2, one in four arts attenders in Dublin are 25s–34s (32% more likely than the general arts attender), and one in two tend to be more affluent (ABC1s). The arts attenders in the rest of the country tend to be slightly older than those in Dublin.

**Table 3.1.2** Geographical Breakdown of Arts Attenders by Age and Social Grade

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Arts-attenders profile |  | Dublin | North-west | East Coast | South-east | South-west | West | Shannonside |
| 15s–24s | vert% | 14.8% | 21.8% | 13.7% | 14.2% | 12.2% | 10.3% | 15.9% |
| Index | 101 | 149 | 94 | 98 | 84 | 71 | 109 |
| 25s–34s | vert% | 23.9% | 9.5% | 19.3 | 10.9% | 14% | 17.4% | 18.8% |
| Index | 132 | 53 | 107 | 60 | 77 | 96 | 104 |
| 35s–44s | vert% | 19.8% | 13.8% | 23.7% | 22.1% | 18.9% | 17.1% | 20.7% |
| Index | 99 | 69 | 119 | 111 | 95 | 86 | 104 |
| 45s–54s | vert% | 14.9% | 23% | 14.7% | 15.7% | 22.9% | 16.5% | 17.9% |
| Index | 87 | 134 | 86 | 91 | 134 | 69 | 104 |
| 55+ | vert% | 26.7% | 31.9% | 28.6% | 37.2% | 32% | 38.7% | 26.7% |
| Index | 88 | 105 | 95 | 123 | 106 | 128 | 88 |
| ABC1 | vert% | 52.1% | 28.2% | 41.1% | 37.1% | 40.3% | 46.3% | 40% |
| Index | 121 | 65 | 95 | 86 | 93 | 107 | 93 |
| C2DE | vert% | 47.6% | 53.7% | 46.7 | 53.3% | 54.2% | 52.8% | 50% |
| Index | 95 | 107 | 93 | 106 | 108 | 105 | 100 |

*All indices highlighted have sufficient sample size, TGI base: arts attenders*

## 3.2 Setting of Arts Events

* As shown in Table 3.2.1, 76% of respondents will have attended a cinema within the last twelve months (by which we mean the venue rather than the artform). It is the venue visited by the highest proportion of the population, and this is consistent with what was reported in AILF 2014.
* Arts attendance at non-specialist venues is significant as well, but slightly declining. For instance, 25% (-4% compared to AILF 2014) have attended some kind of art events at a pub/hotel and 21% (-3% compared to AILF 2014) at a church.
* Festivals and named art outings are attended by some part of the population. 9% have attended any arts festival – an increase of 1% compared to AILF 2014, and driven by slightly higher attendance at Dublin Fringe Festival and Cork Film Festival. Music festivals have the highest attendance, with 12% of adults (-2% compared to AILF 2014).
* A heavy arts attender (at least once a month) is more likely to use a wider number of venues: four different (this matches the result in AILF 2014). Moderate arts attenders (two to three times a year and once a year) visit three venues on average (up from two for both groups in AILF 2014).
* The relationship between the attenders of a venue and their arts interests reveal that those who attended events in a community centre are more likely to have attended a greater variety of arts events than the average arts attender. Community-centre attenders are more likely to have attended plays, musicals, variety shows, and traditional music and country music-related events.

**Table 3.2.1** Arts Venues and Percentage of Attendance 2014 vs 2016

|  |  |
| --- | --- |
|  | % Irish population |
| **Venues of arts-events attendance** | **2014** | **2016** |
| Cinema | 73% | 76% |
| Pub/hotel | 29% | 25% |
| Church | 24% | 21% |
| Theatre  | 19% | 17% |
| Library | 15% | 14% |
| Art gallery | 12% | 12% |
| School hall | 13% | 11% |
| Community centre | 12% | 10% |
| Concert hall/opera house | 11% | 10% |
| Open-air venue | 9% | 8% |
| Other | 5% | 5% |
| Town hall | 6% | 5% |
| Other dedicated music/arts venue | 4% | 3% |

*TGI base: 2014 Irish population, all adults 15+*

*2016 Irish population, All adults 15+*

## 3.3 Sources of Information for Arts Attenders

**Level of Satisfaction with Information About the Arts (Tables 3.3.1 and 3.3.2)**

The latest study asked respondents what channels they used to access information about those arts activities that interest them and about their levels of satisfaction with these sources of information. 84% of respondents gave an answer to this latter question, and of these,

* Discounting those who indicated that they felt the question not applicable, 51% indicated they are satisfied or very satisfied with the available information. This compares with 55% on the same terms in AILF 2014.
* 6% of all respondents indicated themselves to be dissatisfied or very dissatisfied. This is down from 8% in AILF 2014.
* Older respondents are more likely to be satisfied (23% more than average). Younger respondents are more likely to express some dissatisfaction (62% more for 25s–34s and 28% more for 35s–44s).
* The age profile of those indicating dissatisfaction has seen some changes since AILF 2014. In 2014 15s–24s were the most dissatisfied (49% more than average). In 2016 the level of dissatisfaction for this group has dropped to average levels.

**Table 3.3.1** Levels of Satisfaction with Information about Arts Events and Activities (% of Irish Population)

*TGI base: Irish population, all adults 15+*

**Table 3.3.2** Age and Attendance Profile of Satisfaction Groups

|  |  |
| --- | --- |
|  | Level of satisfaction with arts information |
|  | **Satisfied/very satisfied with arts information** |  | **Dissatisfied/very dissatisfied with arts information** |
| **Group Profile:** | **%** | **Index** |  | **%** | **Index** |
| 15–24 | 12% | 86 |  | 14% | 98 |
| 25–34 | 17% | 94 |  | 29% | 162 |
| 35–44 | 19% | 96 |  | 26% | 128 |
| 45–54 | 18% | 103 |  | 12% | 69 |
| 55–64 | 13% | 96 |  | 13% | 94 |
| 65+ | 21% | 123 |  | 7% | 40 |
|  |  |  |  |  |  |
| Attendance: once A MONTH or + | 31% | 177 |  | 33% | 188 |
| Once every 2–3 MONTHS | 23% | 141 |  | 14% | 84 |
| 2–3 times a YEAR | 17% | 108 |  | 16% | 101 |
| Once a YEAR | 7% | 82 |  | 9% | 106 |
| Less often | 6% | 78 |  | 11% | 131 |
| Never | 16% | 46 |  | 18% | 53 |

*All indices highlighted have sufficient sample size, TGI base: satisfied/very satisfied with arts information, dissatisfied/very dissatisfied with arts information*

**General and Arts-specific Media Preferences**

It is possible to analyse the media channels used by arts attenders in general and assess this against the channels used by arts attenders specifically to obtain information regarding the arts.

* As shown in further detail in Table 3.3.3, and looking at the heaviest users of each media type, arts attenders consume the majority of media channels, in line with the average population.
* However, there is a skew towards cinema; therefore they are more likely to be cinema-goers than the average population. When we look at specific media statements that are related to seeking general information, 75% of arts attenders rely on the Internet when they need information, 34% on TV, and 30% on the radio. However, this is in line with the average population.
* As reflected in Table 3.3.4 on the channels used by arts attenders to obtain arts information regarding the arts compared to 2014, there is a big difference in the preferred channels. Internet is the most preferred channel in 2016, followed by television and word of mouth, whereas in 2014 television was the most popular channel to access information on the arts followed by word of mouth and, third, Internet.
* Newspapers and radio follow, with one in four arts attenders seeking arts information through national and local newspaper titles, while one in four arts attenders tend to listen to the national and local radio to obtain arts information.
* A smaller proportion of arts attenders are more likely to obtain information about the arts from events guides and mailing lists.

**Table 3.3.3** Arts Attenders and General Media Usage

|  |  |
| --- | --- |
|  | Arts attenders |
| **Heavy usage per media** | **%** | **Index** |
| Outdoor | 20% |  107 |
| Cinema | 19% | 128 |
| Internet | 19% | 102 |
| Television | 18% | 92 |
| Radio | 17% | 106 |
| Newspapers | 16% | 103 |
| Magazines | 13% | 109 |

*TGI base: arts attenders*

**Table 3.3.4** Channels Used by Arts Attenders to Obtain Arts Information

|  |  |  |  |
| --- | --- | --- | --- |
| Channels of information | % Arts attenders 2016 | % Arts attenders 2014 | % Diff |
| Internet | 38% | 27% | +11% |
| Television | 35% | 37% | -2% |
| Word of mouth | 29% | 32% | -3% |
| Newspapers – local | 25% | 29% | -4% |
| Newspapers – national | 23% | 28% | -5% |
| Radio – national | 21% | 26% | -5% |
| Radio – local | 21% | 22% | -1% |
| Events guide | 17% | 14% | +3% |
| Flyer/leaflet | 12% | 14% | -2% |
| Mailing list – email | 12% | 9% | +3% |
| Poster/billboard/noticeboard | 11% | 9% | +2% |
| Mailing list – post | 7% | 7% | 0% |

*TGI base: arts attenders 2016 and arts attenders 2014*

We can also analyse the specific channels of arts information used by arts attenders. Based on Table 3.3.5, this suggests that:

* Those using direct-mail channels of information tend to indicate higher levels of satisfaction. Mailing-lists users are significantly more likely to be ‘very satisfied’ or ‘satisfied’.
* Amongst the arts attenders who use the Internet, a somewhat slightly higher proportion indicate dissatisfaction. However, a significant proportion is more likely to be ‘satisfied’ or ‘very satisfied’. This could be linked to the presence of younger people amongst the most frequent users of this channel.
* Those who access art information via newspapers, radio and word of mouth are more likely to be ‘satisfied’ or ‘very satisfied’. This correlates particularly with older respondents, who are more prone to indicating satisfaction.

**Table 3.3.5** General Satisfaction of Arts Attenders vs Specific Channels Used

|  |  |  |  |
| --- | --- | --- | --- |
|   |   | Arts attenderssatisfied/very satisfied with arts information | Arts attenders dissatisfied/very dissatisfied with arts information |
| **Sources of information** |  |  |  |
| Internet | Sample | 395 | 79 |
|  | vert% | 46% | 55.2% |
|  | Index | 120 | 144 |
| Television | Sample | 347 | 51 |
|  | vert% | 41.5% | 36% |
|  | Index | 119 | 103 |
| Word of mouth | Sample | 320 | 53 |
|  | vert% | 38.8% | 33.3% |
|  | Index | 135 | 116 |
| Newspapers – local | Sample | 256 | 42 |
|  | vert% | 31.1% | 32.4% |
|  | Index | 125 | 130 |
| Newspapers – National | Sample | 282 | 42 |
|  | vert% | 34.1% | 31.1% |
|  | Index | 146 | 133 |
| Radio – national | Sample | 253 | 32 |
|  | vert% | 29.6% | 20.7% |
|  | Index | 139 | 97 |
| Radio – local | Sample | 211 | 32 |
|  | vert% | 25.3% | 21.1% |
|  | Index | 122 | 102 |
| Events guide | Sample | 198 | 41 |
|  | vert% | 24.0% | 29.9% |
|  | Index | 143 | 178 |
| Flyer/leaflet | Sample | 135 | 27 |
|  | vert% | 15.8% | 21.1% |
|  | Index | 130 | 173 |
| Mailing list – email | Sample | 138 | 19 |
|  | vert% | 17.2% | 15.2% |
|  | Index | 145 | 128 |
| Poster/billboard/noticeboard | Sample | 117 | 23 |
|  | vert% | 14.3% | 16.6% |
|  | Index | 134 | 156 |
| Mailing list – post | Sample | 77 | 9 |
|  | vert% | 8.9% | 5.1% |

*All indices highlighted have sufficient sample size, TGI base: satisfied/very satisfied with arts information,
dissatisfied/very dissatisfied with arts information*

## Artforms – Cultural Cinema

As highlighted above, cinema is the most popular artform in Ireland, with three in four adults having attended a cinema screen in the last twelve months. 13.2% are art-house attenders (see definition in appendix), which is slightly higher compared to 12.5% in 2014.

Table 3.4.1 outlines the age and geographical profile of art-house attenders. There is a stronger skew towards older age groups. 36% of the art-house attenders are over 55s (16% more likely than the average population). Four in ten art-house attenders can be found in Dublin (26% more likely than the average population), with one in ten over indexing towards being located in the west of Ireland.

**Table 3.4.1** Age Profile and Geographical Breakdown of Art-house Attenders

|  |  |  |  |
| --- | --- | --- | --- |
|  | Irish population |  | Art-house attenders |
| **Target group** | **%** |  | **%** | **Index** |
| 15-34 | 32 |  | 30 | 95 |
| 35-54 | 37 |  | 34 | 90 |
| 55+ | 31 |  | 36 | 116 |
|  |  |  |  |  |
| Dublin | 29 |  | 36 | 126 |
| North-west |  9 |  | 9 | 95 |
| East coast |  19 |  | 19 | 98 |
| South-east |  10 |  | 9 | 86 |
| South-west |  13 |  | 11 | 84 |
| West |  8 |  | 11 | 133 |
| Shannonside | 12 |  | 5 | 49 |

*TGI Base: Irish population, all adults 15+*

*art-house attenders*

As shown in table 3.4.2, art-house attenders are more likely to use a variety of media channels compared to arts attenders when it comes to obtaining information regarding the arts. The Internet, television and word of mouth are the most preferred channels, but compared to arts attenders they are more likely to use newspapers, radio, events guides and mailing lists.

**Table 3.4.2** Sources of Information About the Arts for Art-house Attenders

|  |  |
| --- | --- |
|  | Art-house attenders |
| **Sources of information about the arts** | **%** | **Index** |
| Internet | 46% |  119 |
| Word of mouth | 40% | 139 |
| Television | 40% | 114 |
| Newspapers – national | 37% | 157 |
| Radio – national | 32% | 149 |
| Radio – local | 27% | 130 |
| Newspapers – local | 26% | 107 |
| Events guide | 25% | 148 |
| Mailing list – email | 21% | 178 |
| Flyer/leaflet | 14% | 112 |
| Poster/billboard/noticeboard | 13% | 122 |
| Mailing list – post | 9% | 144 |

*TGI base: art-house attenders*

As highlighted in the table 3.4.3, art-house attenders will tend towards attending arts events at a wide array of venues. 38% indicate attendance at theatres (118% more likely) and 30% at galleries (146% more likely). Non-specialist venues are also popular amongst art-house attenders, with one in three attending some manner of arts events at a church and one in four at a library.

**Table 3.4.3** Art-house Attenders and Events Attendance

|  |  |
| --- | --- |
|  | Art-house attenders |
| **Arts-events attendance** | **%** | **Index** |
| Theatre | 38% | 218 |
| Church | 32% | 151 |
| Pub/hotel | 30% | 119 |
| Art gallery | 30% | 246 |
| Library | 27% | 188 |
| Concert hall/opera house | 22% | 221 |
| Community centre | 16% | 153 |
| Open-air venue | 15% | 188 |
| School hall | 14% | 122 |
| Town hall | 8% | 149 |
| Other | 8% | 184 |

*TGI base: art-house attenders*

## 3.5 Artforms – Books

**Books Purchased**

One in three (1.2 million) adults (34%) have bought paperback books in 2016, which is the most preferred type of books purchased in the Republic of Ireland, as shown in Tables 3.5.1 and 3.5.3. However, this is below 2014 purchases, when 46% bought paperbacks.

The purchase of hardbacks, the second most preferred book type in Ireland, is also below the 2014 reported figures: 19% (676,000) of adults in 2016 versus 26% in 2014.

The percentage of adults who buy audiobooks and ebooks is stable. Based on Table 3.5.2, the proportion of women who buy ebooks is significantly higher than men (36% men and 64% women ebook buyers in 2016), and the difference is higher than the other book types, where there is a more equal gender split between buyers.

**Table 3.5.1** Type of Book Purchased 2016 vs 2014

|  |  |
| --- | --- |
|  | **% of Irish population by book-type purchase** |
| **Book type** | **2014** | **2016** | **Difference**  |
| Hardback | 26% | 19% | -7% |
| Paperback | 46% | 34% | -12% |
| ebook | 13% | 13% | 0% |
| Audiobook | 2% | 2% | 0% |

*TGI base: 2016 Irish population, all adults 15+*

*2014 Irish population, all adults 15+*

**Table 3.5.2** Book Type Purchased by Gender

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Gender | Hardback | Paperback | eBooks | Audiobooks |
| Male | 46% | 41% | 36% | 46% |
| Female | 54% | 59% | 64% | 54% |

*TGI base: 2016 Irish population, all adults 15+*

**Table 3.5.3** Number of Book Buyers (see definition in Appendix) by Book Type

|  |  |
| --- | --- |
| Book type | Number of book buyers |
| Hardback | 676,000 |
| Paperback | 1,222,000 |
| eBooks | 484,000 |
| Audiobooks | 63,000 |

*TGI base: book buyers*

**Geographical Breakdown and Buying Habits of Book Buyers**

In terms of geographical breakdown, as shown in Table 3.5.4, there is no significant skew towards any of the regions in Ireland. Half of the book buyers are located in two regions. Three in ten can be found in Dublin, and two in ten on the east coast, a regional spread on par with the average population.

**Table 3.5.4** Book Purchase by Region

|  |  |
| --- | --- |
|  | Book buyers |
| **ROI Regions** | **%** | **Index** |
| Dublin | 31 | 106 |
| North-west | 8 | 90 |
| East coast | 18 | 95 |
| South-east | 10 | 98 |
| South-west | 13 | 104 |
| West | 9 | 106 |
| Shannonside | 11 | 94 |

*TGI base: book buyers*

The majority of book buyers (75%) have visited a book shop in the last three months, and one in five (22%) claim they bought a book online in the last twelve months. This has not changed since 2014. However, there is a 15% decline in buying books from a bookshop compared to 2014.

**Sources of Information About the Arts for Book Buyers and Satisfaction**

As shown in Table 3.5.5, Internet is a key channel to arts-related information. 45% of book buyers in the Republic of Ireland have used the channel to obtain information regarding the arts. 37% tend to be responsive to word of mouth (28% more likely than the arts attenders), and 31% seek arts information through national newspapers (31% more likely than the arts attenders).

Amongst those who use the Internet to obtain information, 60% indicate lower levels of satisfaction. The same applies for those using local newspapers (35% are dissatisfied – 34% more likely than the general population). In addition, traditional-media users (television, national radio and national newspapers) are more inclined to be ‘very satisfied’ or ‘satisfied’ with the art information on these channels. Additionally, those who get art information from posters or word of mouth are significantly more likely to be ‘satisfied’.

**Table 3.5.5** Sources of Information About the Arts for Book Buyers

|  |  |
| --- | --- |
|  | Book buyers |
| **Sources of information about the arts** | **%** | **Index** |
| Internet | 45% |  117 |
| Word of mouth | 37% | 128 |
| Television | 36% | 103 |
| Newspapers – national | 31% | 131 |
| Newspapers – local | 30% | 122 |
| Radio – national | 27% | 124 |
| Radio – local | 24% | 117 |
| Events guide | 22% | 134 |
| Mailing List – email | 16% | 133 |
| Flyer/leaflet | 15% | 125 |
| Poster/billboard/noticeboard | 15% | 138 |
| Mailing list – post | 10% | 151 |

*TGI base: book buyers*

## 3.6 Artforms – Literature

Literature (see definition in Appendix) includes classic literature, children’s and other fiction books. As shown in Tables 3.7.1 and 3.7.2, 20% (336,000 adults) indicated they bought a ‘children’s’ book, and 18% (297,000 adults) an ‘other fiction’ book in 2016. This is slightly down from 23% and 19% respectively in 2014. The proportion of book buyers who bought a classic-literature book remains stable in 2016 compared to 2014, with 8% (138,000 adults) having bought a classic-literature book. In the Republic of Ireland 634,000 adults have bought any type of literature book in the last twelve months. Based on table 3.7.3 – types of books bought by the book buyers in general and the literature-book buyers – the behaviour of the literature-book buyers is similar to the general-book buyers when it comes to preferred book types. Paperback is again the most popular book type, with 13% of adults having bought a paperback literature book in the last twelve months. Similar to the general-book buyers, hardbacks, ebooks and audiobooks follow.

**Table 3.6.1** Type of Literature Books Purchased 2016 vs 2014

|  |  |
| --- | --- |
|  | **% of Irish population by type of literature books bought** |
| **Literature type** | **2014** | **2016** | **Difference**  |
| Classic literature | 8% | 8% | 0% |
| Children’s | 23% | 20% | -3% |
| Other fiction | 19% | 18% | -2% |

*TGI base: 2014 literature-book buyers*

*2016 literature book buyers*

**Table 3.6.2** Universe of Book Buyers by Literature Type in 2016

|  |  |
| --- | --- |
| Literature type | Number of book buyers |
| Classic literature | 138,000 |
| Children’s | 336,000 |
| Other fiction | 297,000 |
| Any literature book | 634,000 |

*TGI base: literature-book buyers*

**Table 3.6.3** Percentage of Population Who BuyAll Books and Literature Books by Book Type in 2016

|  |  |  |
| --- | --- | --- |
| Book type | All books | Literature books |
| Hardback | 19% | 6% |
| Paperback | 34% | 13% |
| eBooks | 13% | 3% |
| Audiobooks | 2% | 1% |

*TGI base: book buyers, literature book buyers*

## 3.7 Artforms – Opera and Classical Music

58% of opera and classical-music attenders (see definition in Appendix) are women (13% more likely than the average population). A breakdown by gender, age and geographical detail of this group is presented in Table 3.7.1. This shows the younger age group 15s–34s under-index most significantly on attendance, and older age group 55+ are 29% more likely than the average population to attend opera and classical-music events. In terms of geography Dublin is a key region as four in ten opera- and classical-music-goers are likely to be located there (133% more likely).

A significant 34% of the opera/classical-music attenders indicated they listened to opera/classical music on the radio, 167% above the average population. In terms of accessing content through other media channels, this is not available in the TGI questionnaire. Instead, we can look at their affinity towards consuming music content on TV and online. A small proportion (15%) watch music programmes on TV, on par with the average, and almost one in two (46%) tend to listen to the radio online.

Attendance at live events is higher in the Republic of Ireland than elsewhere: 35% (154% more likely) have been to an opera/classical-music event in 2016. A smaller core of respondents (7%) have attended similar events elsewhere in the UK (204% more likely to do so than the general population).

**Table 3.7.1** Main Demographics of Opera/Classical-music Attenders

|  |  |  |  |
| --- | --- | --- | --- |
|  | Irish population |  | Opera and classical-music attenders |
| Target group | **%** |  | **%** | **Index** |
| Male | 49 |  | 42 | 86 |
| Female | 51 |  | 58 | 113 |
|  |  |  |  |  |
| 15–34 | 32 |  | 24 | 74 |
| 35–54 | 37 |  | 36 | 98 |
| 55+ | 31 |  | 40 | 129 |
|  |  |  |  |  |
| Dublin | 29 |  | 38 | 133 |
| North-west | 9 |  | 7 | 74 |
| East coast | 19 |  | 17 | 90 |
| South-east | 10 |  | 11 | 106 |
| South-west | 13 |  | 12 | 91 |
| West | 8 |  | 7 | 86 |
| Shannonside | 12 |  | 8 | 70 |

*TGI base: Irish population, all adults 15+*

*opera and classical-music attenders*

## 3.8 Communities for Whom Access to the Arts is Difficult

This chapter presents data (as shown in Table 3.8.1) from respondents within six communities that are located in the Republic of Ireland, looking at factors that impact their arts attendance. These communities are: unemployed/homemakers, disabled, older adults (65+), social-grade C2DE, social-grade E, and ethnic minorities (see definition in Appendix).

The disabled, those of social-grade E, and the unemployed/homemakers seem to have the most significant barriers to arts engagement.

Amongst the disabled, 40% indicate attendance difficulties related to health issues, 34% see cost as a barrier, and 17% have transport concerns, with significantly higher indexes on all of the above than the average population.

22% of theunemployed/homemakers and 21% of those of social-grade E claim cost as their most significant barrier.

**Table 3.8.1** Communities for Whom Access to the Arts is Difficult and Their Barriers

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | **Disabled** | **Social-grade E** | **Unemployed****/homemakers** | **Older adults****(65+)** | **Social-grade****C2DE** | **Ethnic****minorities** |
| **Any difficulty** | vert%Index | 60% | 40% | 38% | 30% | 28% | 25% |
| 217 | 145 | 136 | 108 | 102 | 92 |
| Health issues | Index | 40% | 13% | 9% | 10% | 7% | 0% |
| Index | 659 | 217 | 149 | 167 | 118 | 0 |
| Access to building | vert% | 7% | 2% | 1% | 2% | 1% | 1% |
| Index | 538 | 164 | 65 | 181 | 104 | 68 |
| Can't afford/cost | vert% | 34% | 21% | 22% | 11% | 15% | 15% |
| Index | 248 | 150 | 160 | 77 | 111 | 106 |
| Family commitments | vert% | 5% | 7% | 10% | 4% | 7% | 6% |
| Index | 74 | 113 | 149 | 54 | 98 | 96 |
| Transport difficulties | vert% | 17% | 10% | 8% | 5% | 6% | 7% |
| Index | 346 | 201 | 160 | 108 | 118 | 153 |
| Fear of going out in the evening | vert% | 4% | 4% | 4% | 5% | 2% | 1% |
| Index | 202 | 185 | 164 | 231 | 103 | 42 |
| Too far away/inconvenient | vert% | 15% | 12% | 10% | 9% | 8% | 11% |
| Index | 196 | 152 | 132 | 118 | 100 | 139 |
| Nobody to go with | vert% | 17% | 6% | 6% | 5% | 6% | 6% |
| Index | 304 | 115 | 103 | 94 | 110 | 115 |
| Inadequate information on event | vert% | 2% | 2% | 1% | 0.4% | 1% | 4% |
| Index | 155 | 156 | 73 | 41 | 106 | 368 |
| Not very interested in these kinds of things | vert% | 2% | 7% | 4% | 4% | 4% | 1% |
| Index | 66 | 214 | 129 | 124 | 115 | 35 |
| I might feel uncomfortable or out of place | vert% | 7% | 7% | 6% | 3% | 5% | 3% |
| Index | 178 | 184 | 152 | 84 | 126 | 83 |
| Difficult to find time | vert% | 1% | 5% | 7% | 4% | 5% | 8% |
| Index | 17 | 86 | 129 | 67 | 92 | 144 |

*All indices highlighted have sufficient sample size, TGI base: disabled, unemployed/homemakers, social-grade E, ethnic minorities, 65+*

# APPENDIX

## Methodology of Kantar Media’s TGI

**The Target Group Index – Overview**

The Republic of Ireland TGI is an annual market-research study of approximately 3,000 Irish adults (15+) that provides behavioural, lifestyle and attitudinal insights into the Irish population.

In common with similar Kantar Media research studies now conducted in over sixty countries worldwide, the scope of the TGI study is a broad one. In summary, the aim is to provide a comprehensive picture of the habits, consumption patterns and attitudes of the population. The TGI is used by its clients to:

• Identify and profile particular ‘target groups’ who might share a particular behaviour

• Consider the opportunities created by changing behaviours or attitudes

• Establish the best channels of communication to particular target groups.

Whilst the TGI has a strong focus on how brands (consumer or media) have contact with their consumers, the TGI has a much broader remit than the establishment of consumption profiles. Instead, its core objective is to reflect the diversity of different types of audience grouping – whether grouped according to media, consumer, lifestyle, leisure or attitudinal preferences.

In terms of methodology for the Republic of Ireland TGI 2016, responses were garnered by way of a self-completion questionnaire completed in full by 3,002 adults. Placement of these questionnaires occurred over two separate periods: October to December 2015 and January to March 2016.

It is the intention of the TGI study that a nationally representative sample of adults are surveyed, and fieldwork is therefore conducted via a mix of CATI (computer-assisted telephone interviewing) interviews, face-to-face contact interviews, and re-contact with prior respondents.

The subsequent results (after relevant completeness checks) are also weighted and grossed to the total adult Irish population in order to ensure their representativeness.

Full methodological details can be made available on request to readers of the above report.

## Report Definitions

**Arts attender:** Those who have attended art events in the last twelve months in venues including:

Cinema

Church

Concert hall/opera house

School hall

Town hall

Community centre

Art gallery

Theatre

Other dedicated music/arts venue

Library

Open-air venue

Pub/hotel

**Arts participation:** Participation in a range of arts activities is captured on the TGI questionnaire by way of a section entitled ‘Hobbies and Interests’, measuring ‘regular’ and ‘occasional’ participation in a set of named activities within the past year.

**Art-house attenders:** Those who have watched a documentary, period drama, foreign-language film or an art-house film in the last twelve months.

**Book buyers**: Those who have bought a book in any format in the last twelve months.

**Literature:** Includes classic literature, children’s and other fiction.

**Opera and classical-music attenders:** Those who have attended an opera or classical-music concert in the last twelve months.

**Ethnic minorities:** Asians (incl. Chinese), black or any other ethnic group – excluding white, white Irish and other white.

**About Kantar Media**

Kantar Media is a global leader in media intelligence, providing clients with the data they need to make informed decisions on all aspects of media measurement, monitoring and selection. Part of Kantar, the data-investment management arm of WPP, Kantar Media provides the most comprehensive and accurate intelligence on media consumption, performance and value. For further information, please visit us at [www.kantarmedia.com](http://www.kantarmedia.com/)

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1. **Available as download at: http://www.artscouncil.ie/Arts-in-Ireland/Strategic-development/The-Arts-in-Irish-Life.** [↑](#footnote-ref-1)
2. **More information regarding the purpose and methodology of the TGI can be sourced in the AILF: 2014 Report.** [↑](#footnote-ref-2)
3. **All findings should be cited as: C Kantar Media: TGI 2014 or 2015: Arts in Irish Life.** [↑](#footnote-ref-3)
4. **All findings should be cited as: C Kantar Media: TGI 2015 or 2016: Arts in Irish Life.** [↑](#footnote-ref-4)
5. **This figure comprises those indicating any ‘Last 12 month’ attendance of a specific genre of event, or indicating attendance of specific named arts festivals in the last twelve months.**

6 **It should be noted that ‘regular’ and ‘occasional’ participation are not further defined in the TGI questionnaire as meaning a specific frequency of behaviour. They are therefore based upon the subjective understanding of respondents.** [↑](#footnote-ref-5)