

indigo
share
ireland

Overview of Audiences in Ireland, 2022

August 2023

In association with

indigo



Building a stronger
performing arts
community in Ireland.



Indigo Share Ireland has been developed by [Indigo-Ltd](#) in consultation with the [Theatre Forum](#), Ireland and Heather Maitland.

It is a collaborative approach to gathering audience insight via customer surveys for Irish Arts and Cultural organisations.

Indigo Share Ireland is free for cultural organisations. To sign up to take part visit [here](#).

This report has been prepared by:

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Flo Carr, Associate Director, Indigo-Ltd
Ellie Oates, Audience Insight Executive

www.indigo-ltd.com

Please reference any data you quote or publish from this report as follows:

Indigo Share Ireland Audience Overview Report, 2022, © Indigo-Ltd 2023.

Context

In 2022 Indigo-Ltd and the Theatre Forum undertook an Ireland-wide research project called Missing Audiences. This involved 36 Irish organisations and received responses from over 8,000 audiences. The results were used, with interpretation from Katy Raines (Indigo) and Heather Maitland (Arts Consultant) to help Theatre Forum members plan an effective recovery from the damaging effects of Covid 19.

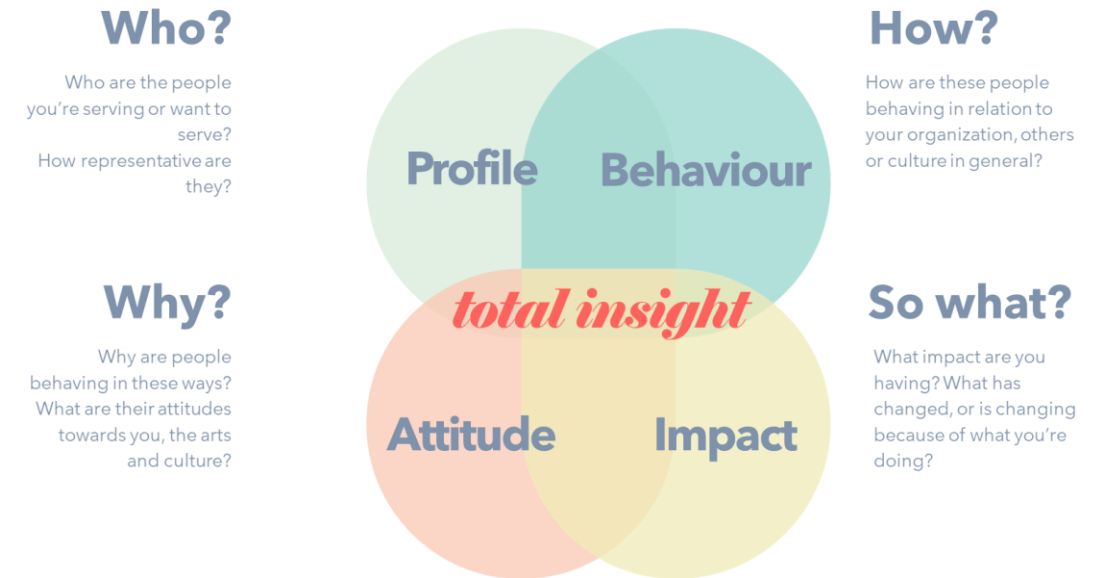
The project demonstrated the collective power of undertaking audience research together, in a co-ordinated sector-wide approach.

Therefore in discussion with Theatre Forum, it was decided to launch an annual Audience Insights project beginning in 2023. This involves 2 strands:

- **Box Office data** analysis (aggregated and analysed by Heather Maitland)
- 2 surveys – an annual snapshot survey (**Audience Overview**) and a post-show survey (**Audience Experience**)

This report shows the results for the **Audience Overview** survey

The Audience Insights project uses Indigo’s Total Insight model, which looks at audiences through these 4 lenses: PROFILE, BEHAVIOUR, ATTITUDE and IMPACT.



By helping organisations understand their audiences through these 4 lenses, we believe, gives them the best chance of understanding how all the many data sources they have may help fit together to understand audiences better.

Methodology

Cultural organisations in Ireland, including theatres, arts Centres and festivals were invited to participate in the Indigo Share research. The research was free for cultural organisations in Ireland to take part.

Organisations were each provided with a unique link to send out to their previous attendees who attended in 2022. Organisations were provided with a link to see the results from their own organisation in real time, and the results from all organisations were then aggregated to form the aggregate data set.

The survey ran from 14 June – 31 July and during that period, 5,058 responses were gathered through 35 cultural organisations.

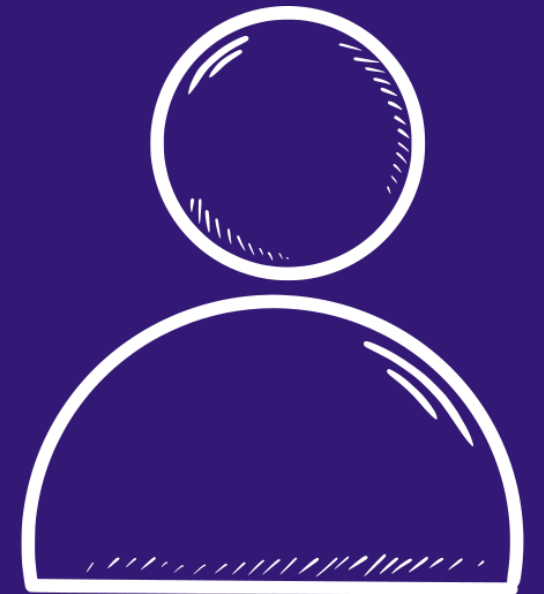
Participating organisations

An Grianán Theatre
An Táin Arts Centre
Backstage Theatre
Ballina Arts Centre
Cork Midsummer Festival
Cork Opera House
dlr Mill Theatre
Droichead Arts Centre
Dublin Dance Festival
Dublin Fringe Festival
Dunamais Arts Centre
Glór
Hawk's Well Theatre
Lime Tree Theatre
Linenhall Arts Centre
Mermaid Arts Centre
National Opera House

Project Arts Centre
Riverbank Arts Centre
Roscommon Arts Centre
Siamsa Tíre, The National Folk Theatre of Ireland
Smock Alley Theatre
Solstice Arts Centre
South Tipperary Arts Centre
St John's Theatre and Arts Centre
The Civic Tallaght
The Dock
The Everyman
The Glens Centre
The Whale Theatre
Theatre Royal Waterford
Triskel Arts Centre
VISUAL Carlow
Wexford Arts Centre

Full results

Audience PROFILE

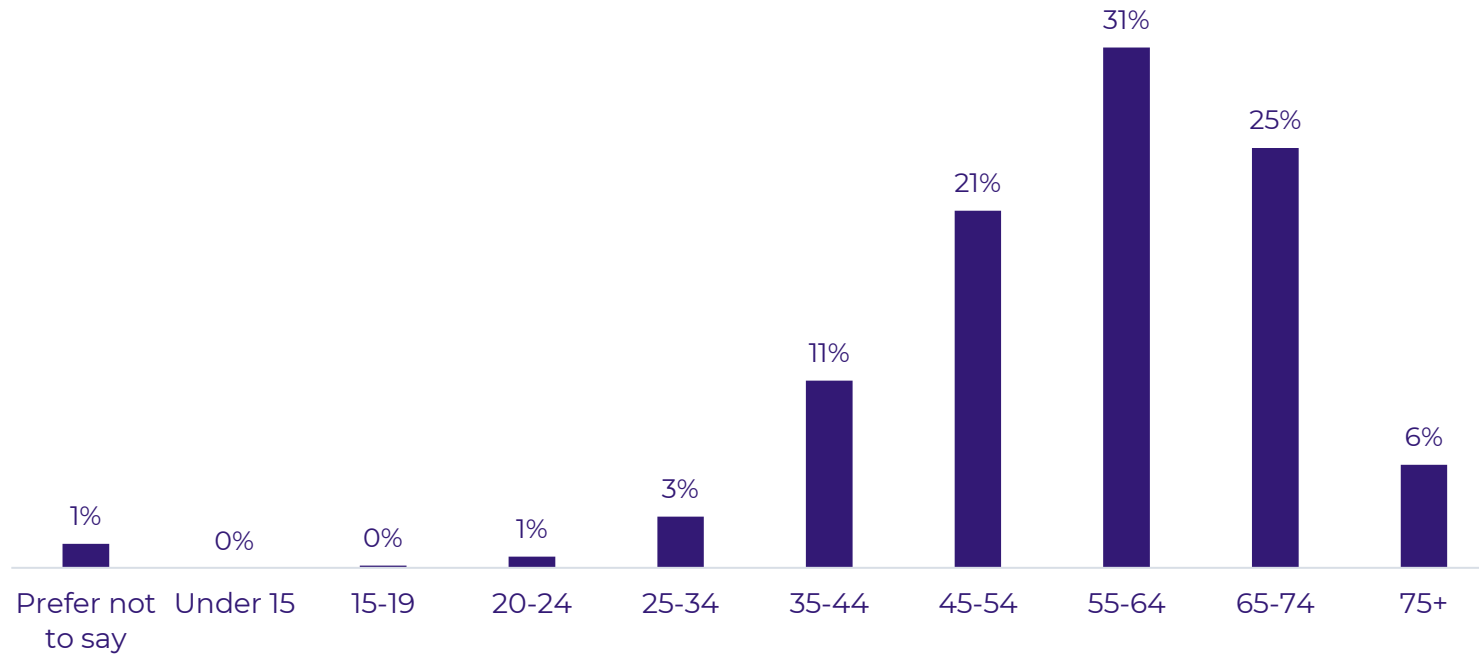




Profile

Age

How old are you?

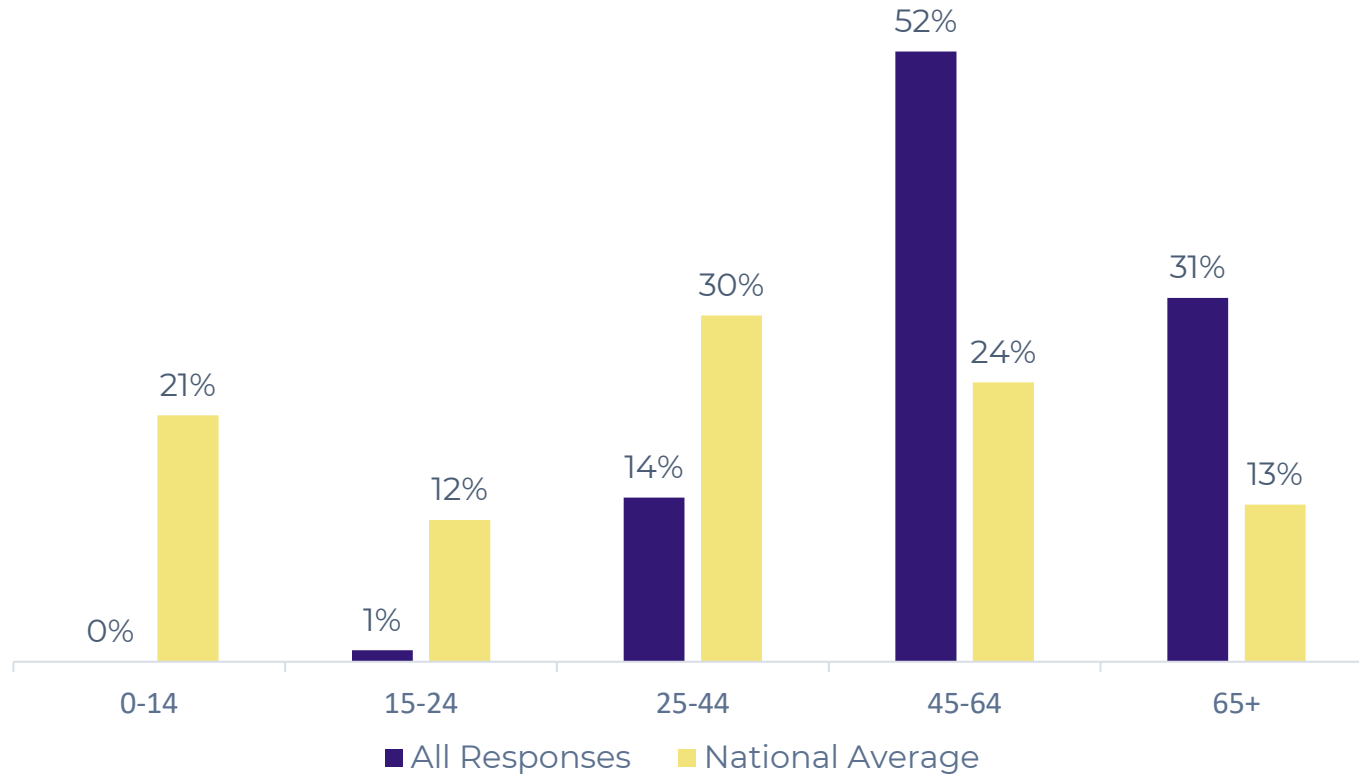


■ All Responses

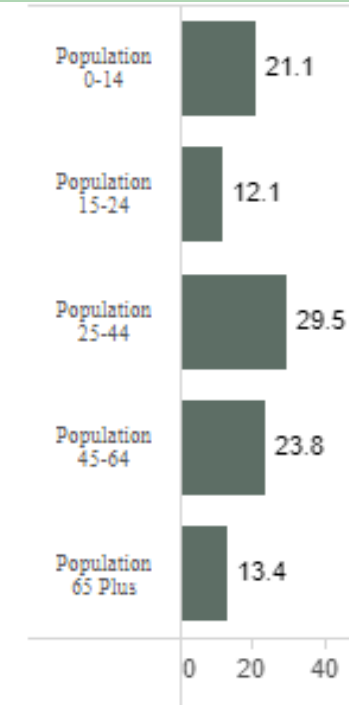


Age: Compared with Ireland Census

How old are you?



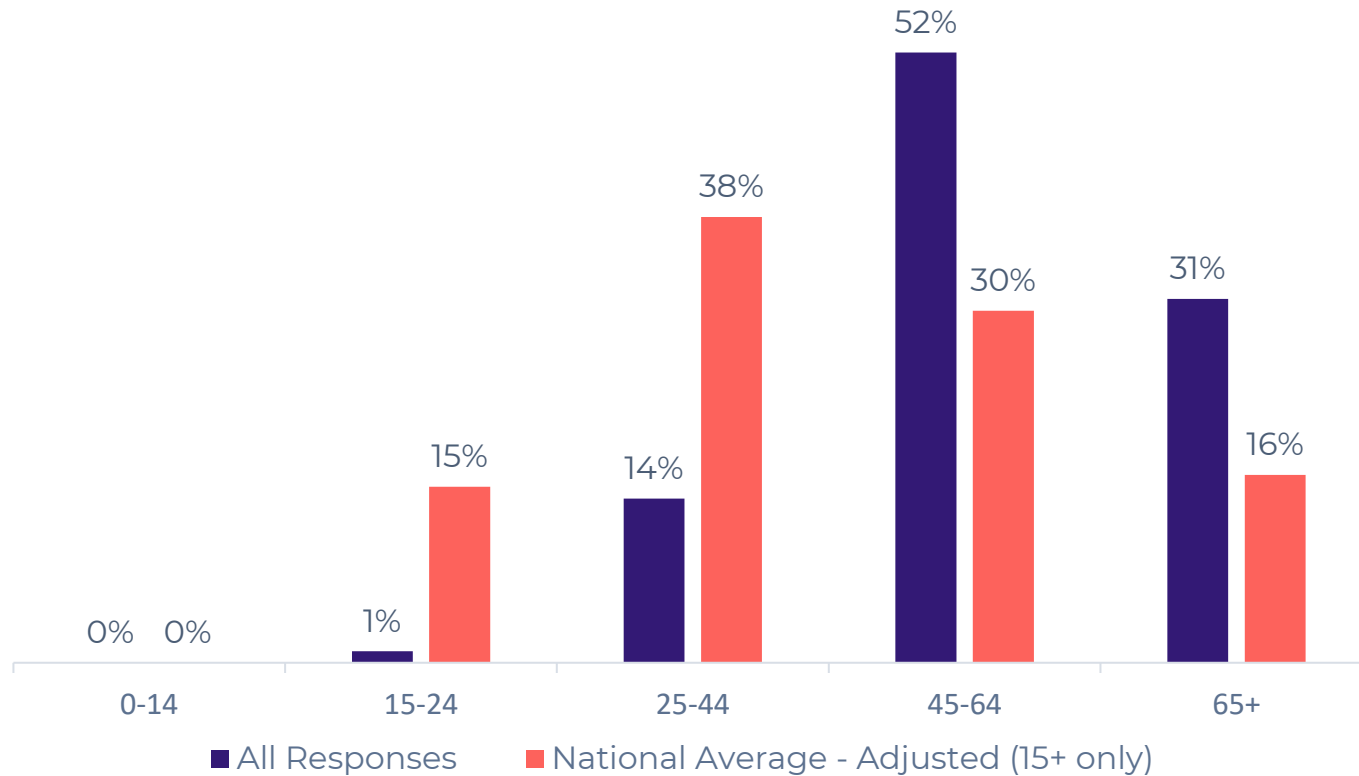
Tip
Use census data to compare YOUR results with YOUR area



<https://www.artscouncil.ie/arts-in-ireland/arts-centres/mapping-your-audience/>

Age: Compared with Ireland Census (adjusted)

How old are you?



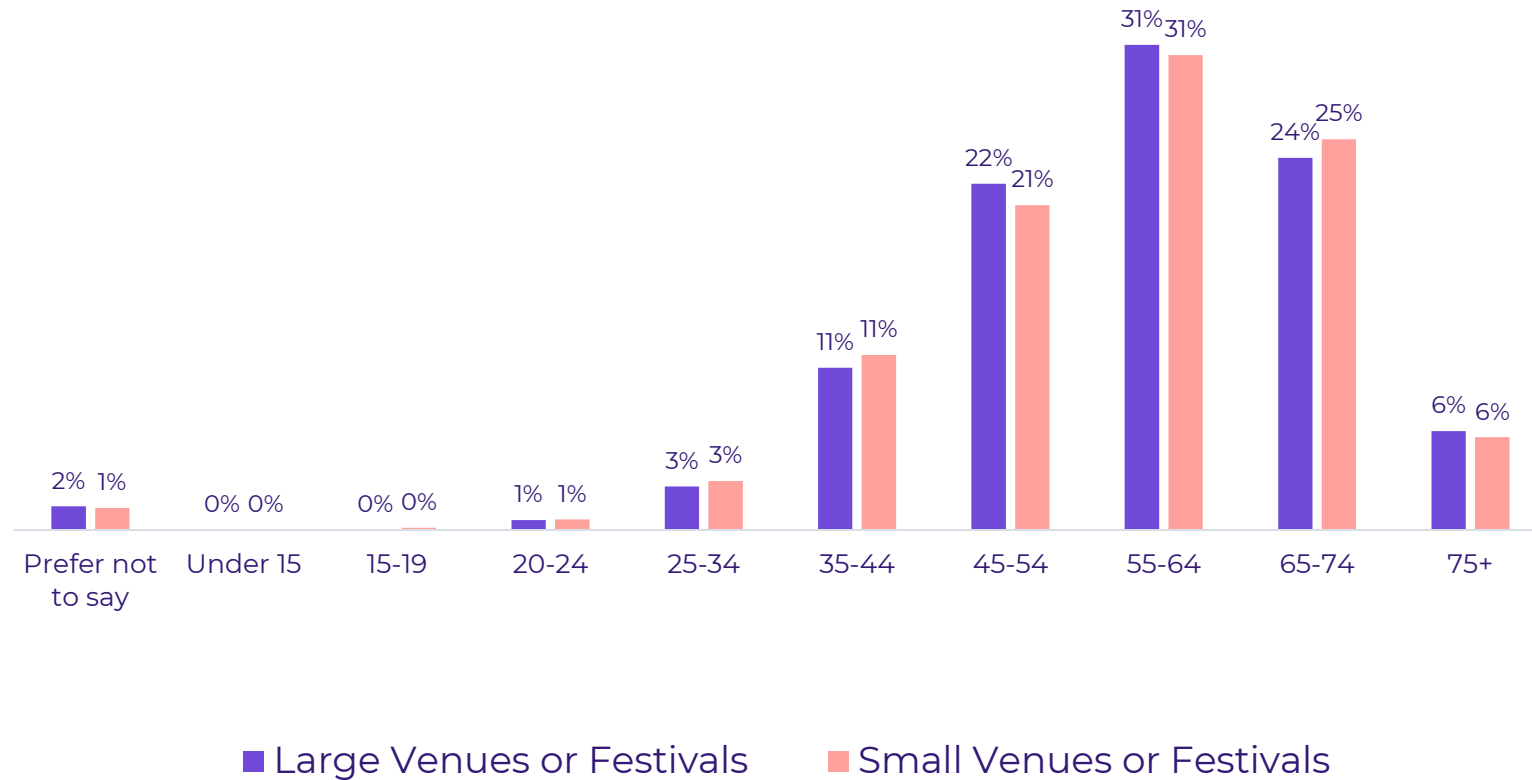
Adjustment

We have adjusted the population percentages to ONLY show the population 15+ so that the data is more comparable



Large organisations compared to small organisations

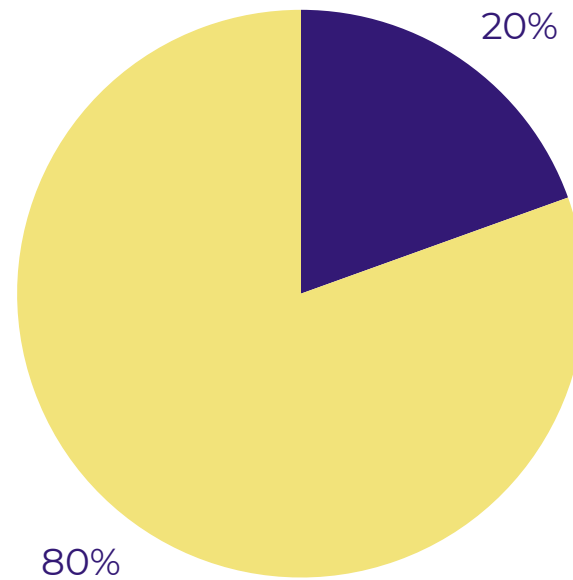
How old are you?





Children under 16

Do you have children under 16 living with you?

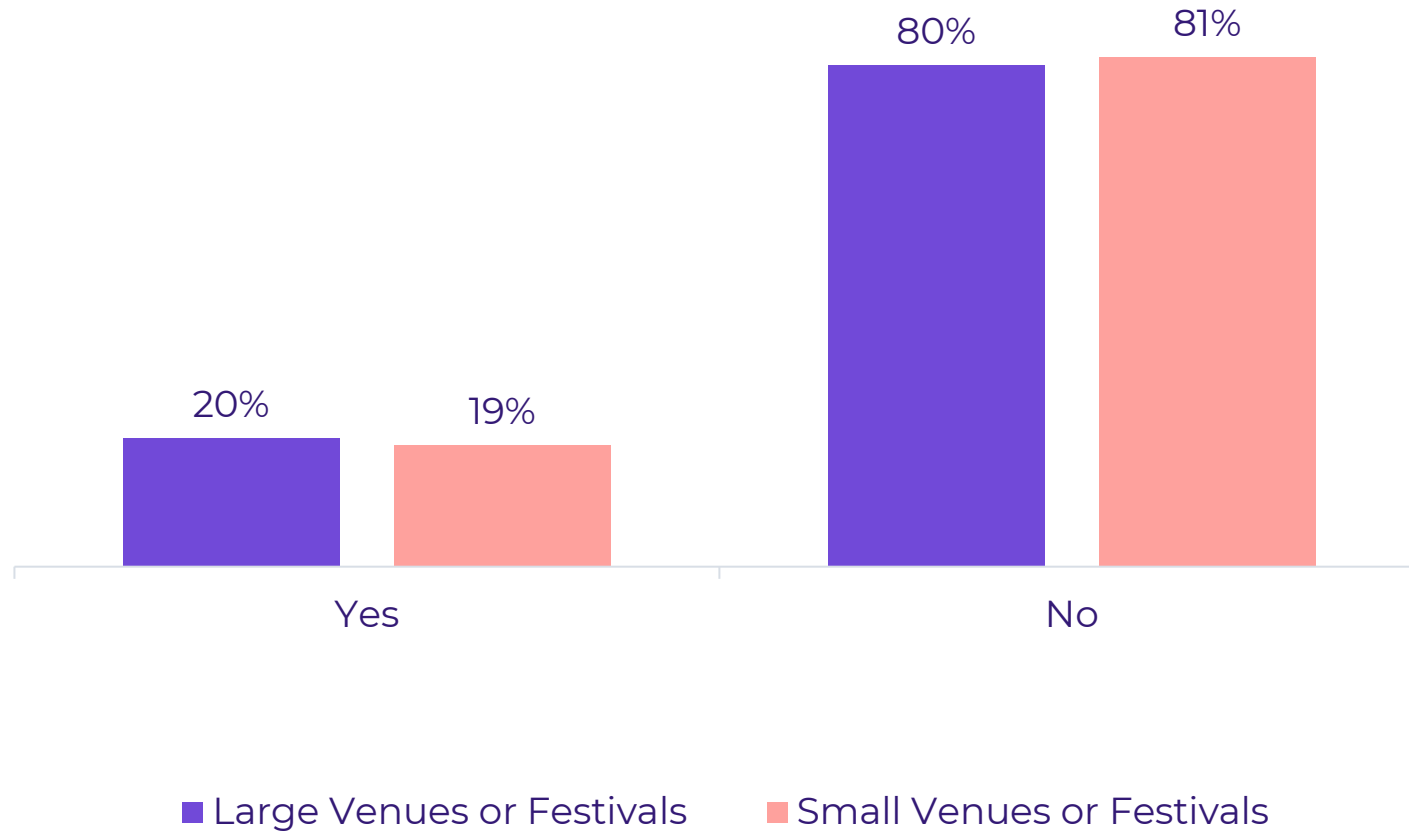


■ Yes ■ No



Large organisations compared to small organisations

Do you have children under 16 living with you?

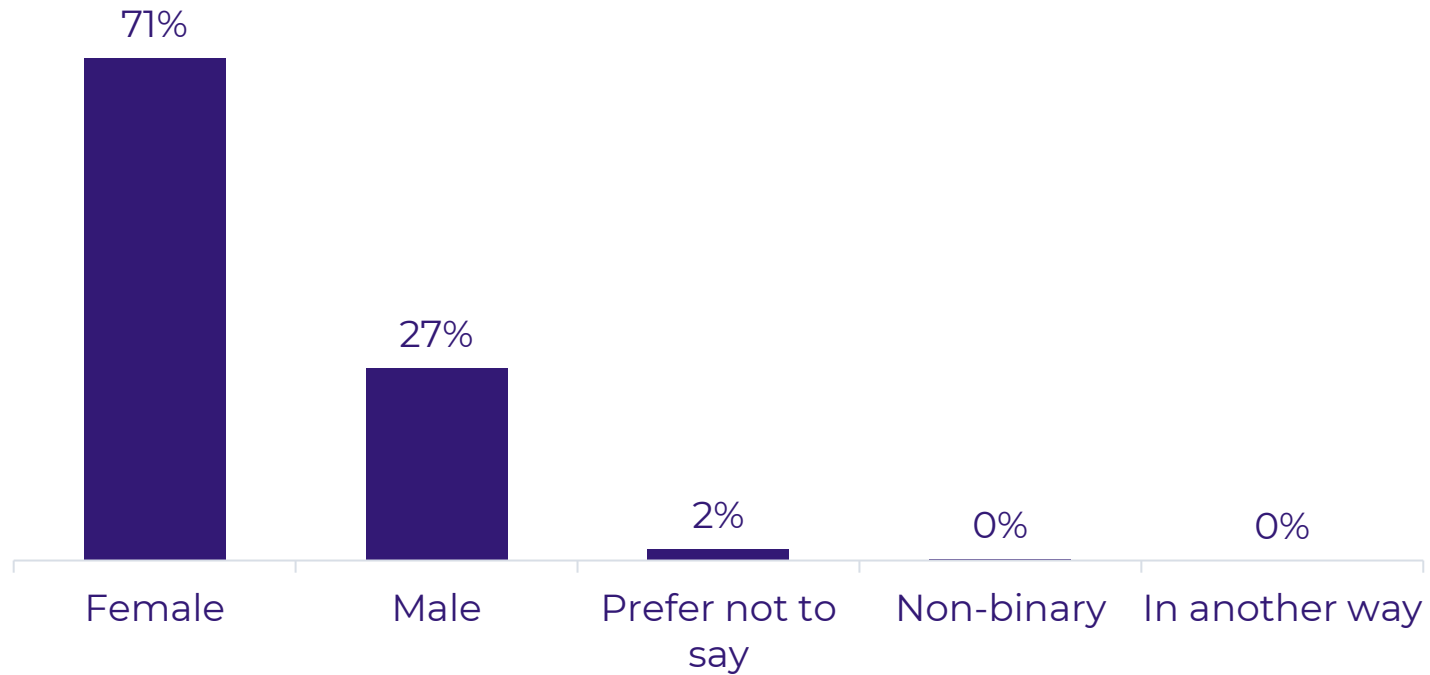




Profile

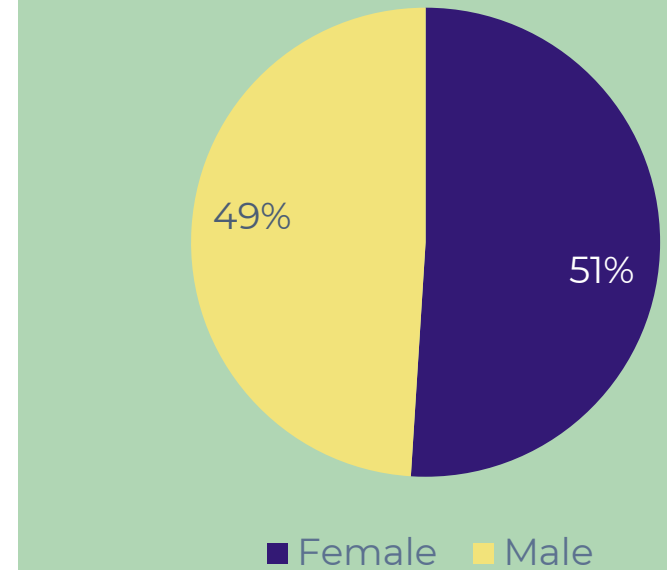
Gender

How would you describe your gender?



■ Female ■ Male ■ Prefer not to say ■ Non-binary ■ In another way

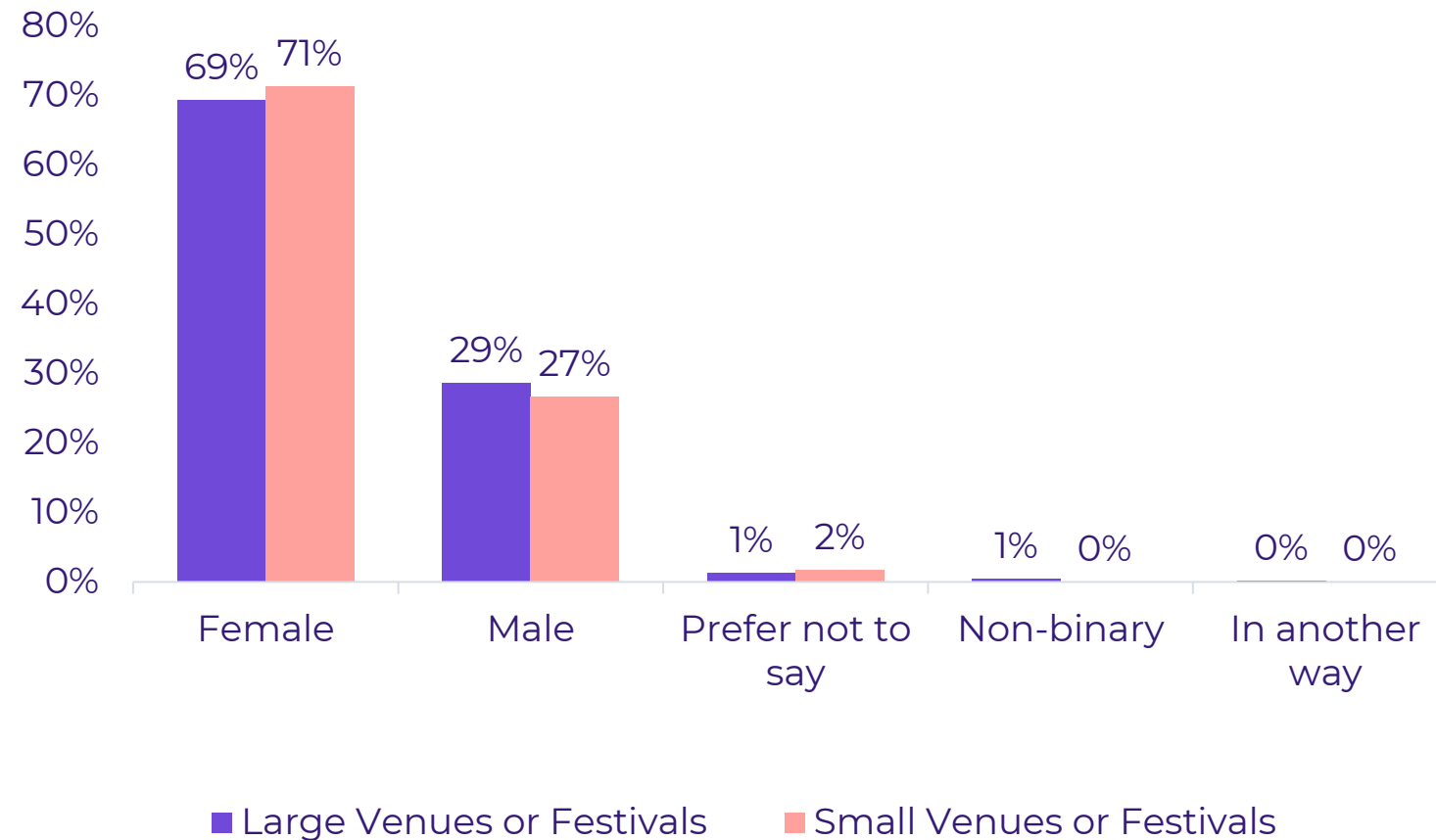
National Average:





Large organisations compared to small organisations

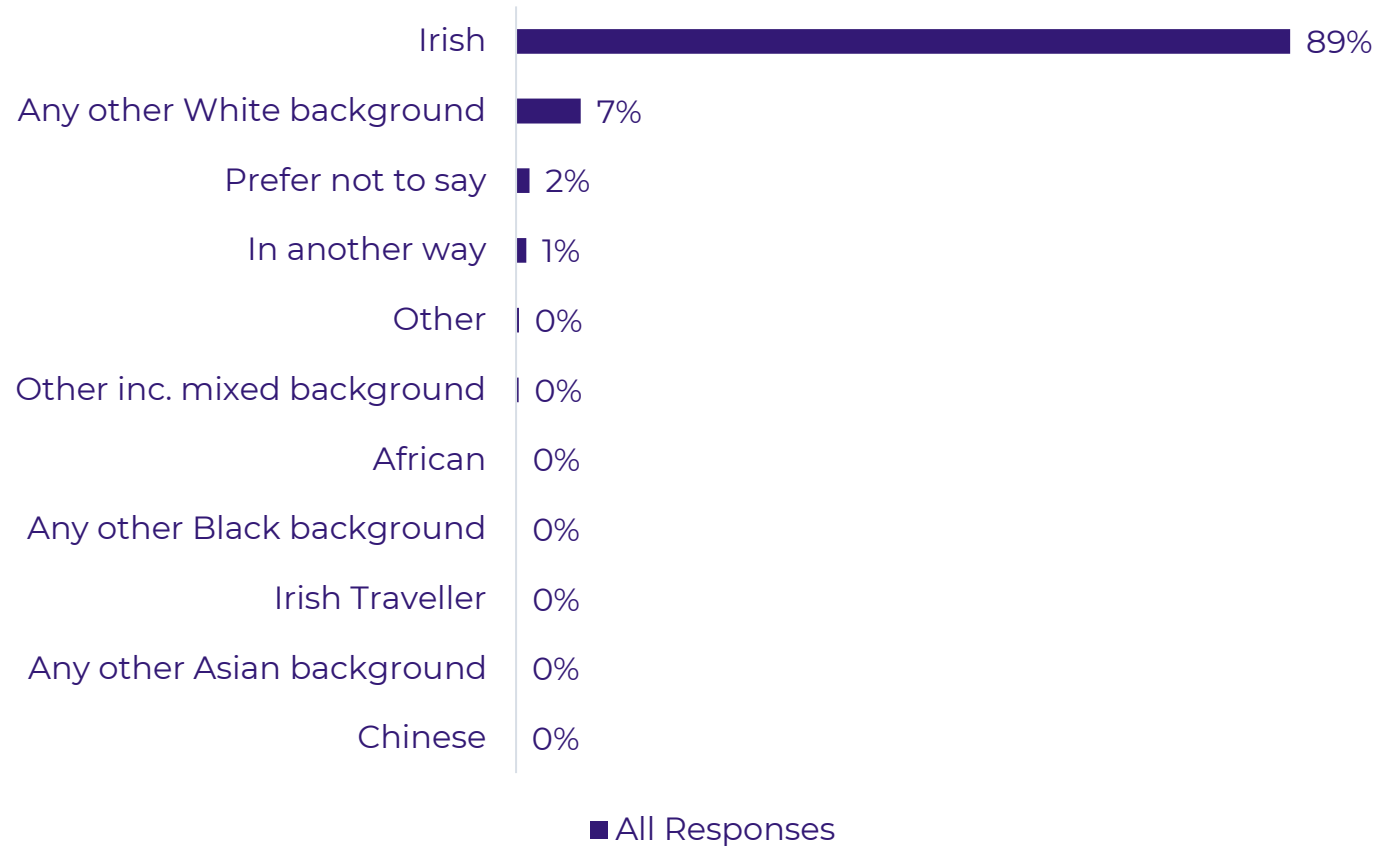
How would you describe your gender?





Ethnic Origin

How would you describe your ethnic origin?



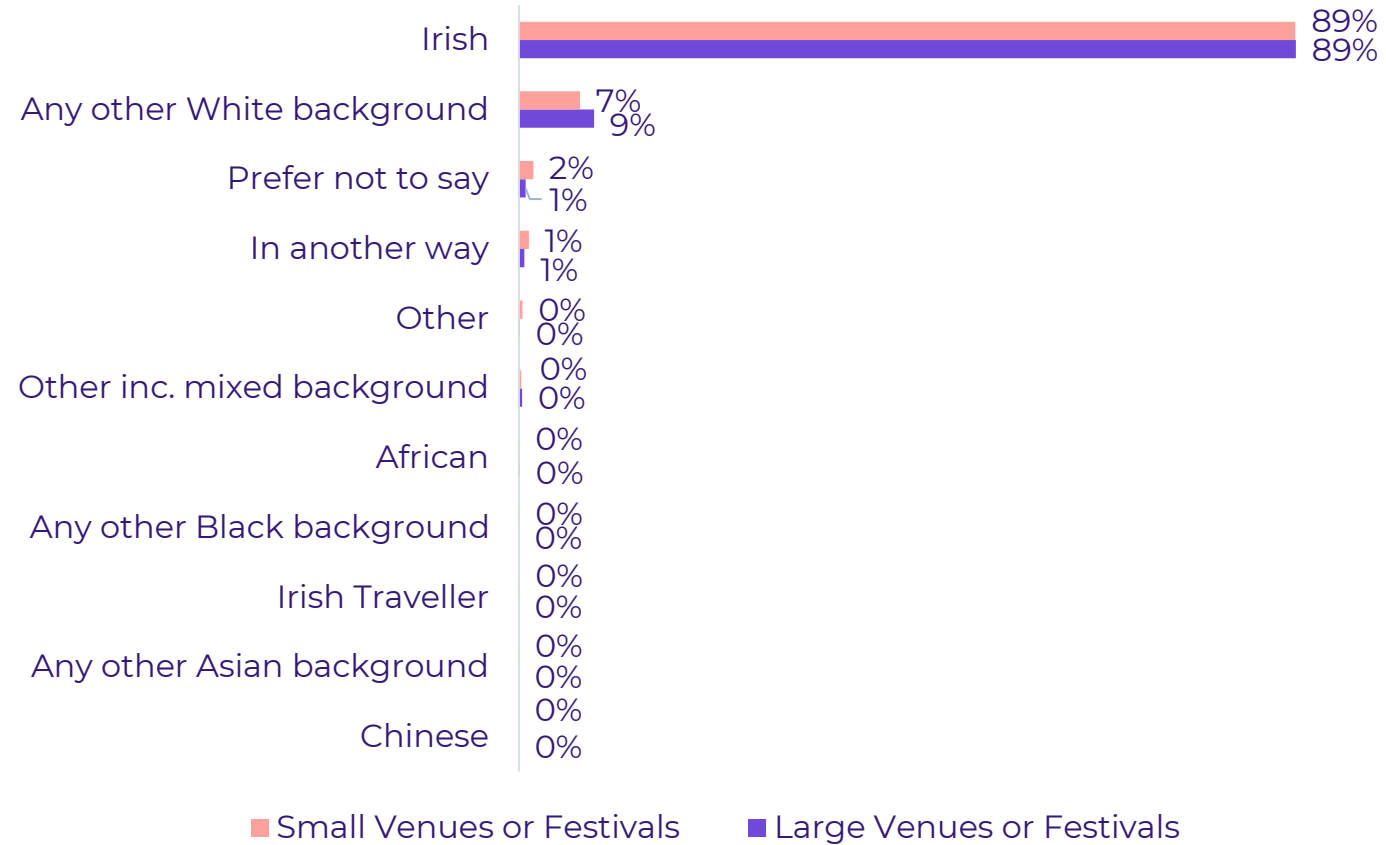
Comparison with Ireland census

National Average:
91.7% White Irish



Large organisations compared to small organisations

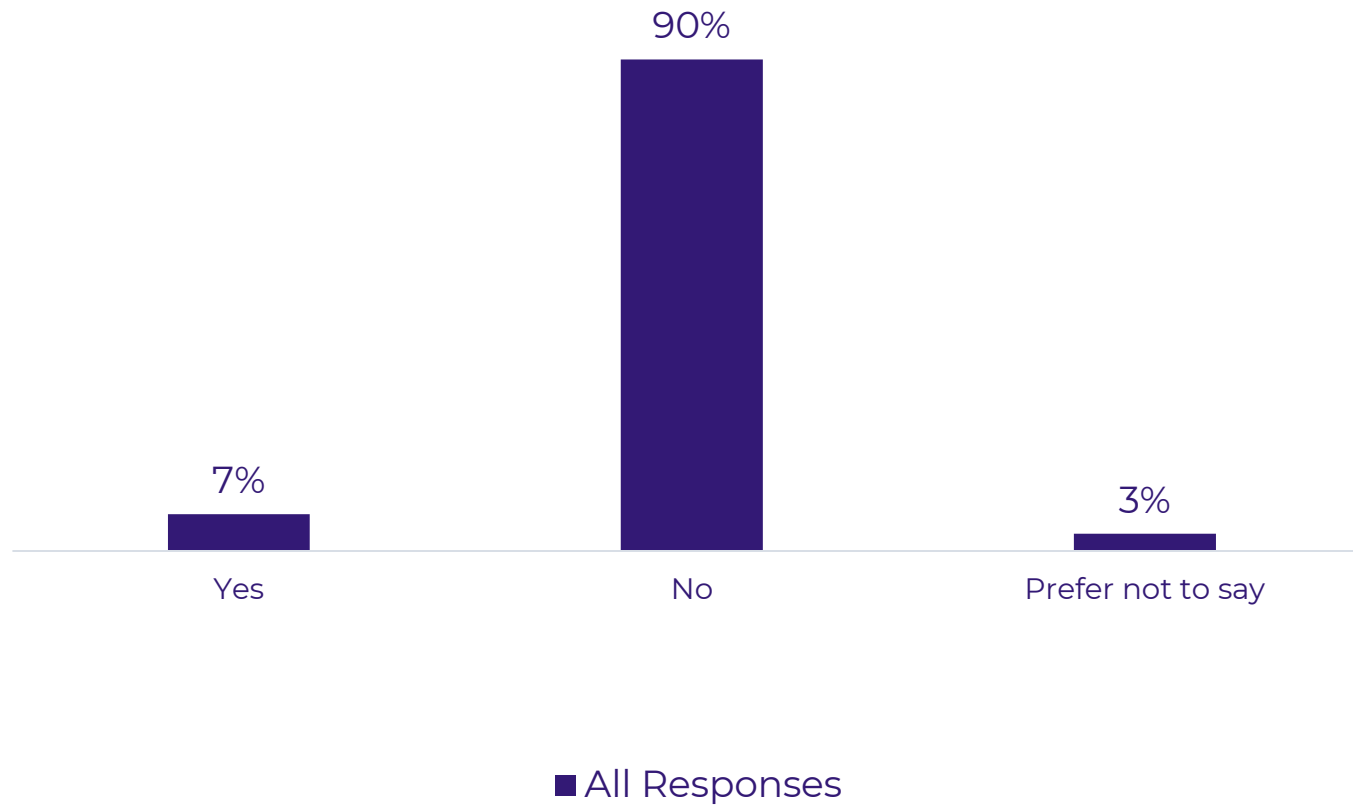
How would you describe your ethnic origin?





Disability

Do you identify as a D/deaf or D/disabled person or have a long term health condition?



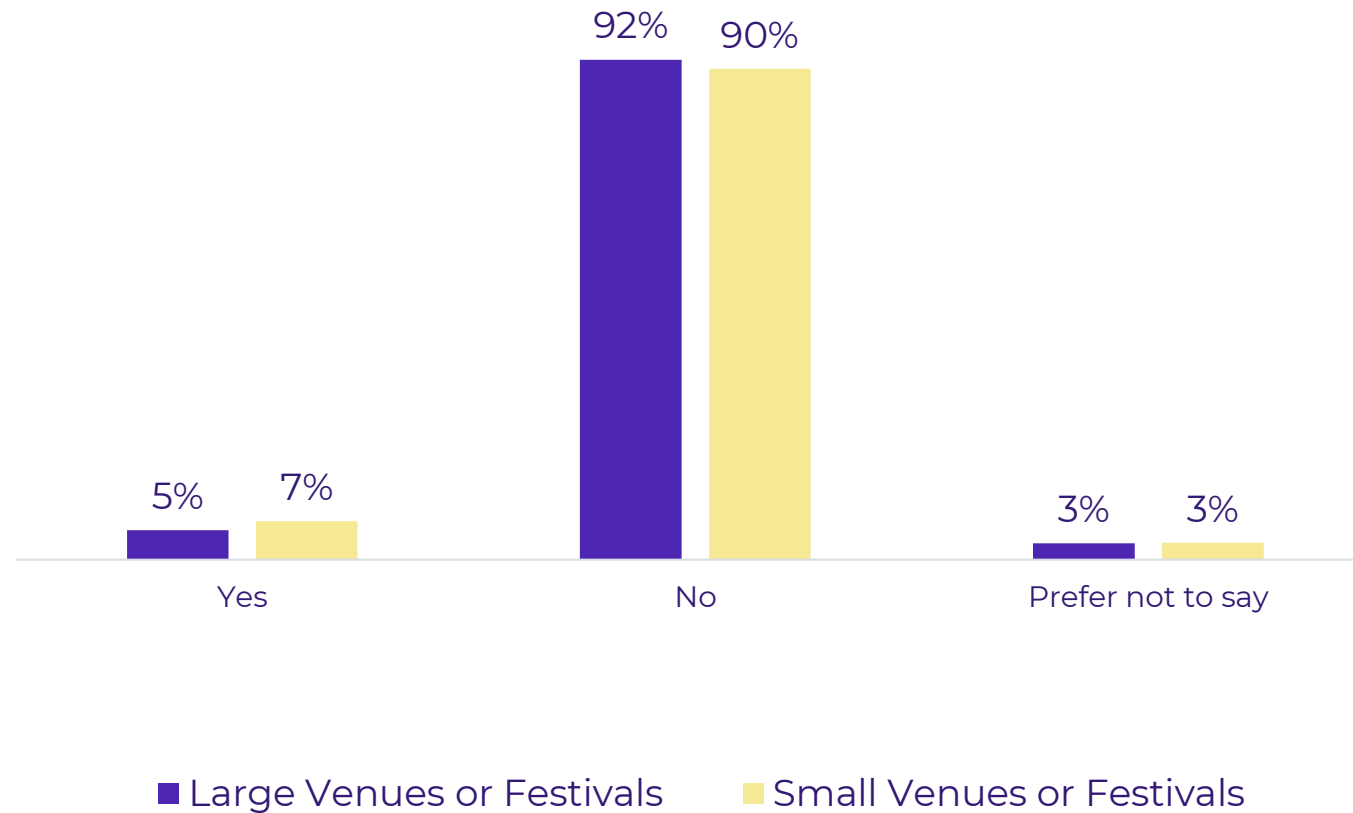
Comparison with Ireland census

National Average: **13.5%** 'Yes'



Large organisations compared to small organisations

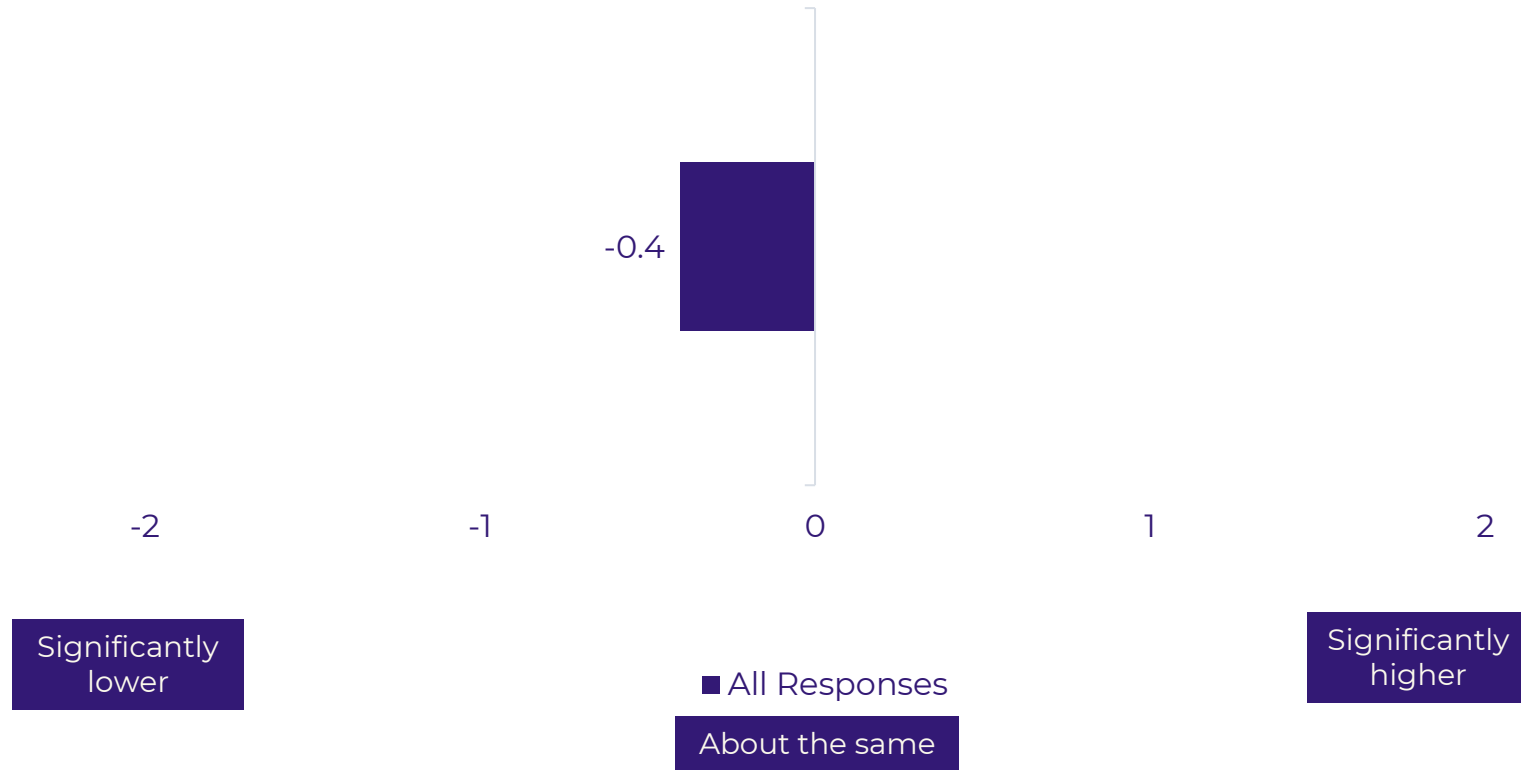
Do you identify as a D/deaf or D/disabled person or have a long term health condition?





Respondent profile: salary

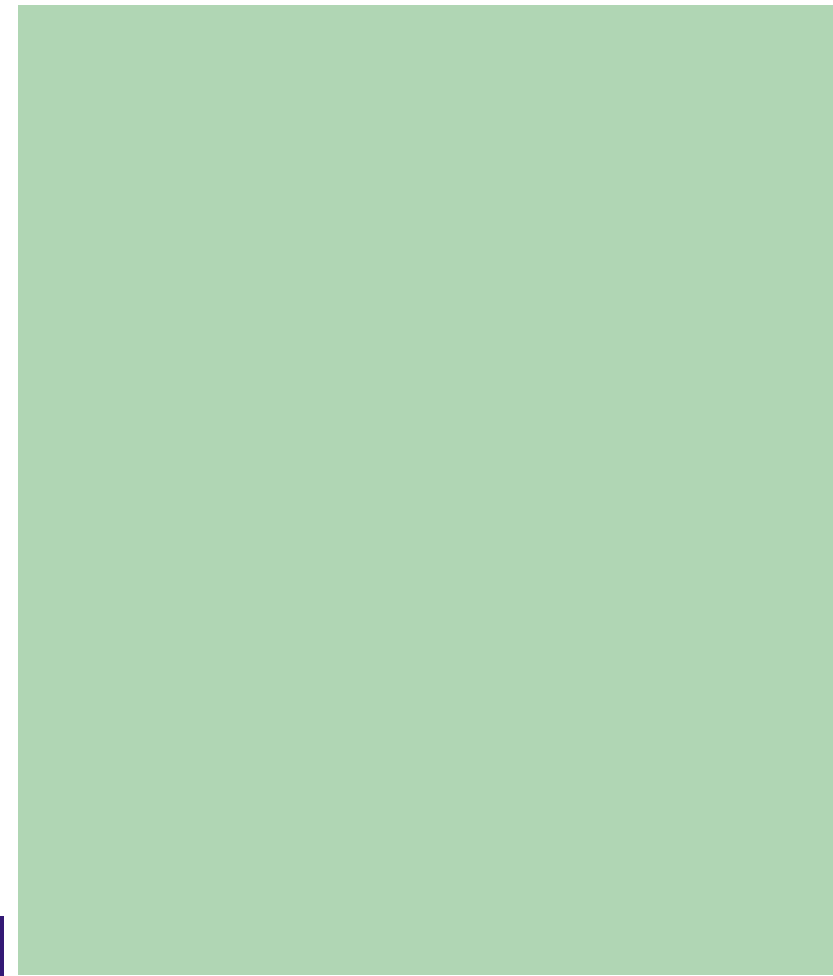
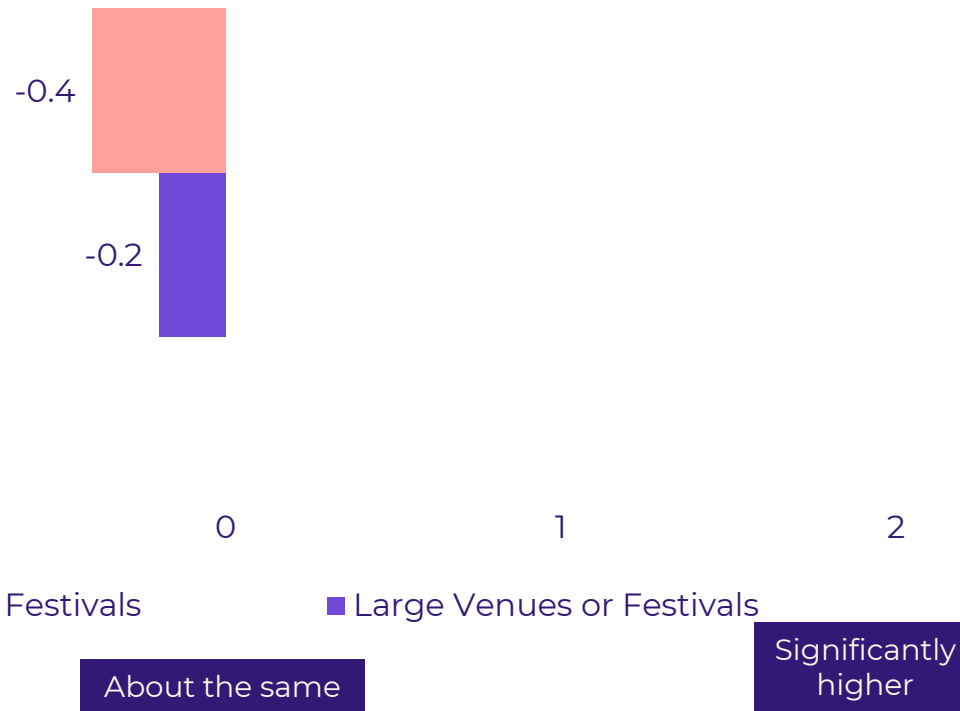
In 2022, the average (median) salary in Ireland was €44K.
How does your salary compare? If you work part-time, please base this on your actual part-time income rather than full-time equivalent.





Large organisations compared to small organisations

In 2022, the average (median) salary in Ireland was €44K.
How does your salary compare? If you work part-time, please base this on your actual part-time income rather than full-time equivalent.



General cultural BEHAVIOUR

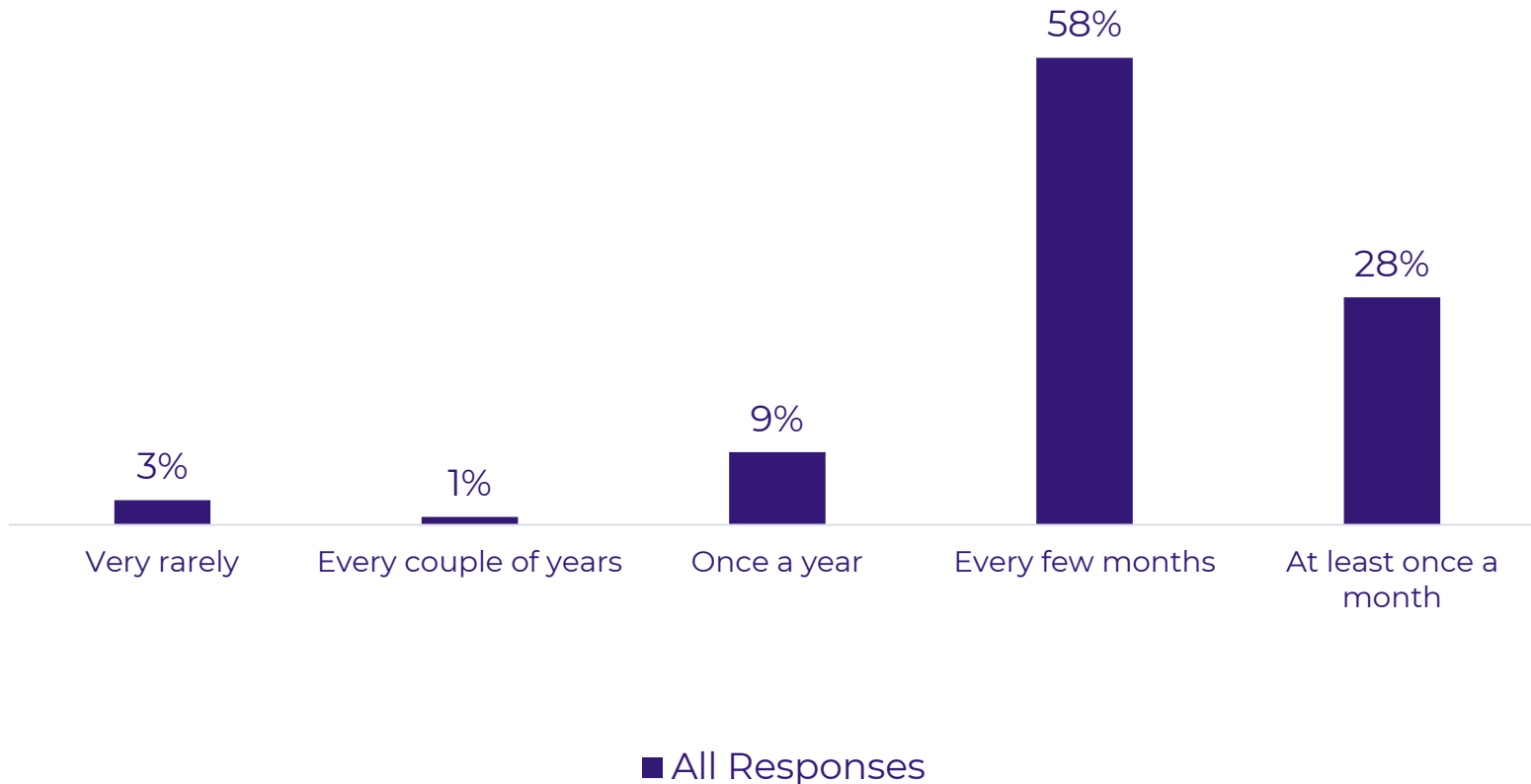
How are audiences behaving generally in relation to arts and culture?





Survey respondents are highly frequent attenders to arts and cultural events

How frequently would you say you attend arts and cultural events overall? (Select one)



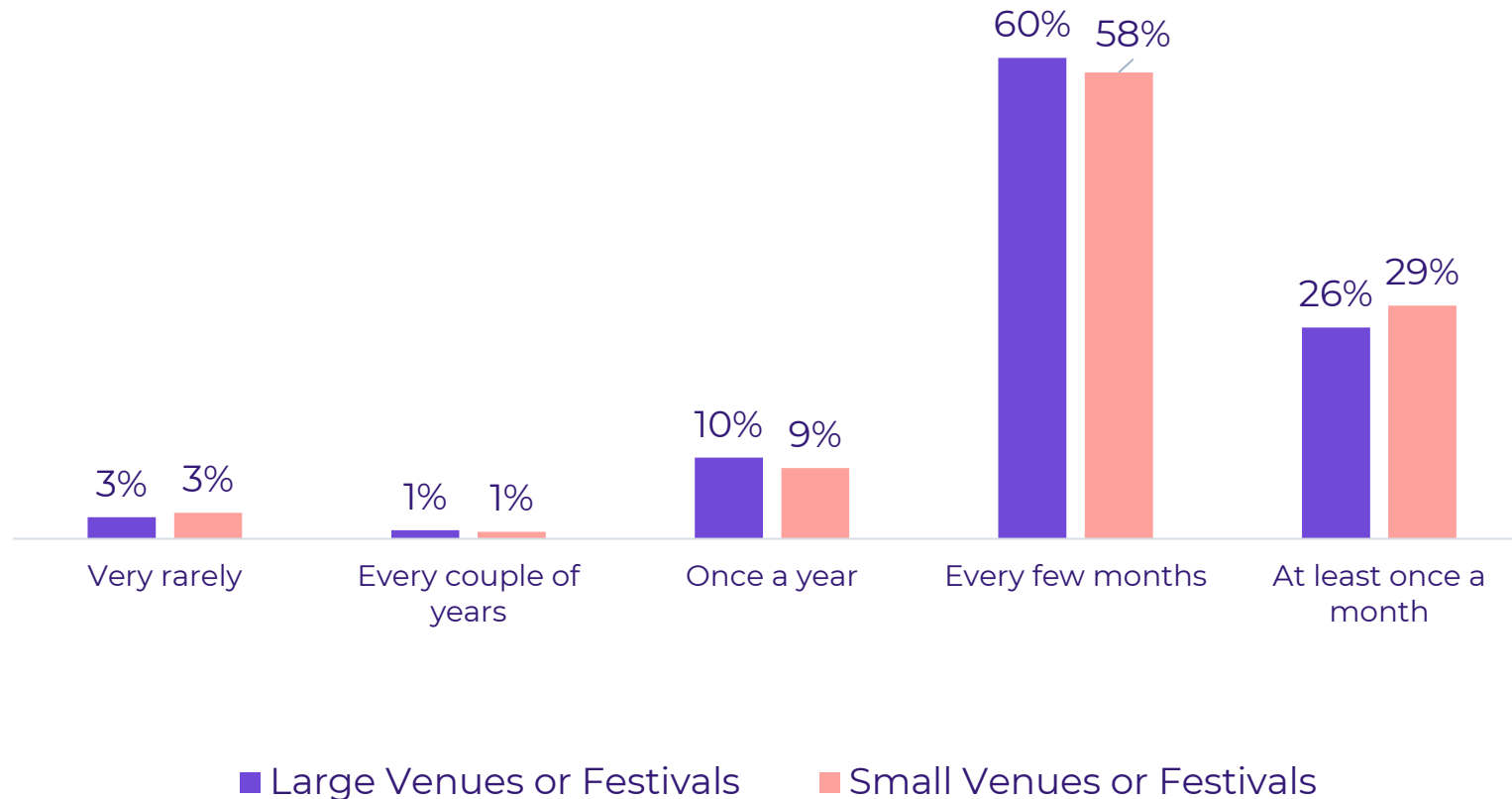
Frequency of attendance

- 86% of respondents attend arts and cultural events at least every few months.
- 28% of respondents say they attends something at least once a month.



Large organisations compared to small organisations

How frequently would you say you attend arts and cultural events overall? (Select one)



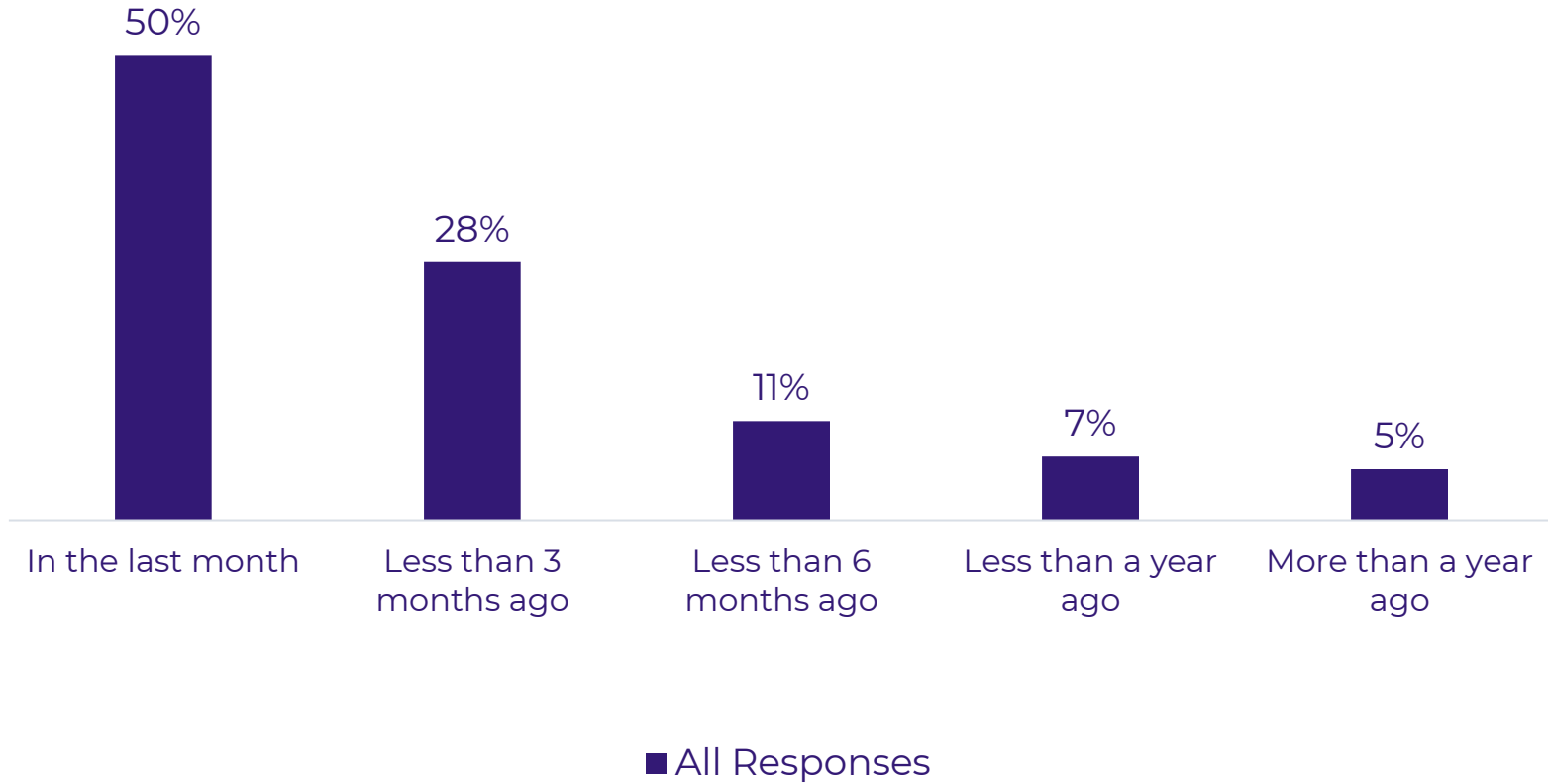
Frequency of attendance

- Respondents from small venues or festivals are more likely to attend at least once a month.



Half of survey respondents have attended something in the last month

When would you say you last attended something cultural?
(Select one)



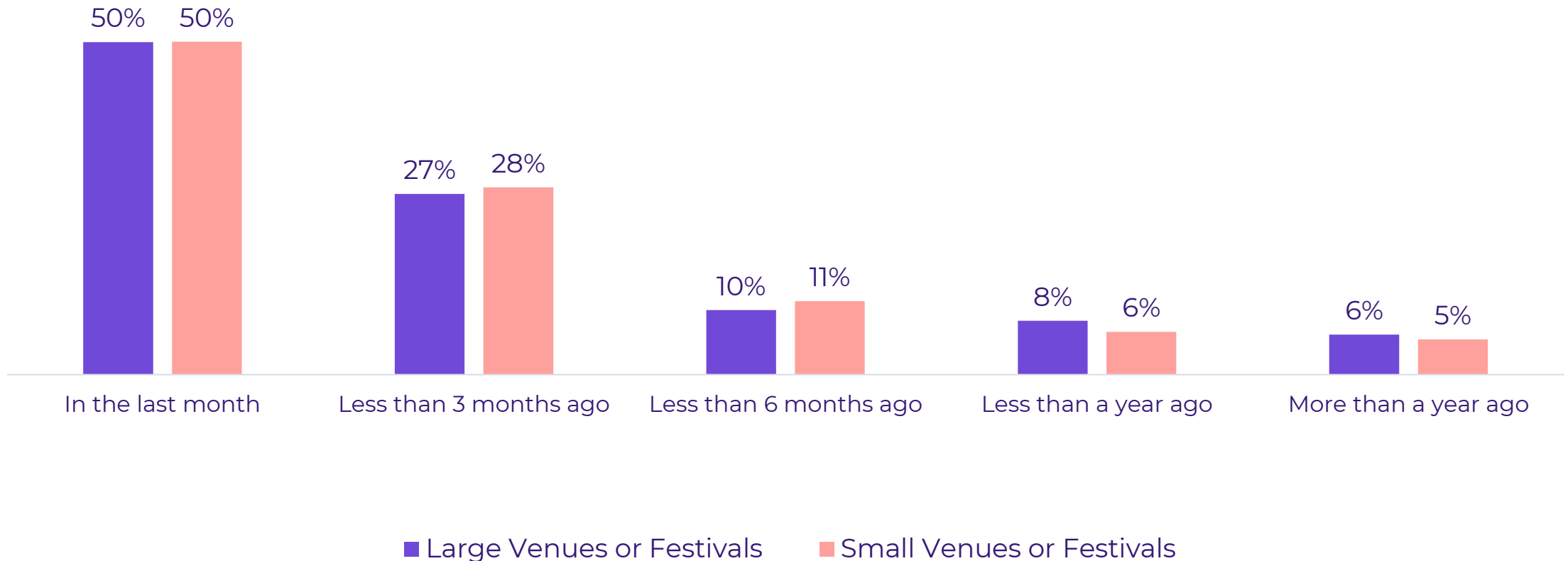
Recency of attendance

- Half of respondents have been to something in the last month.
- More than three quarters of respondents have attended something within the last 3 months.



Large organisations compared to small organisations

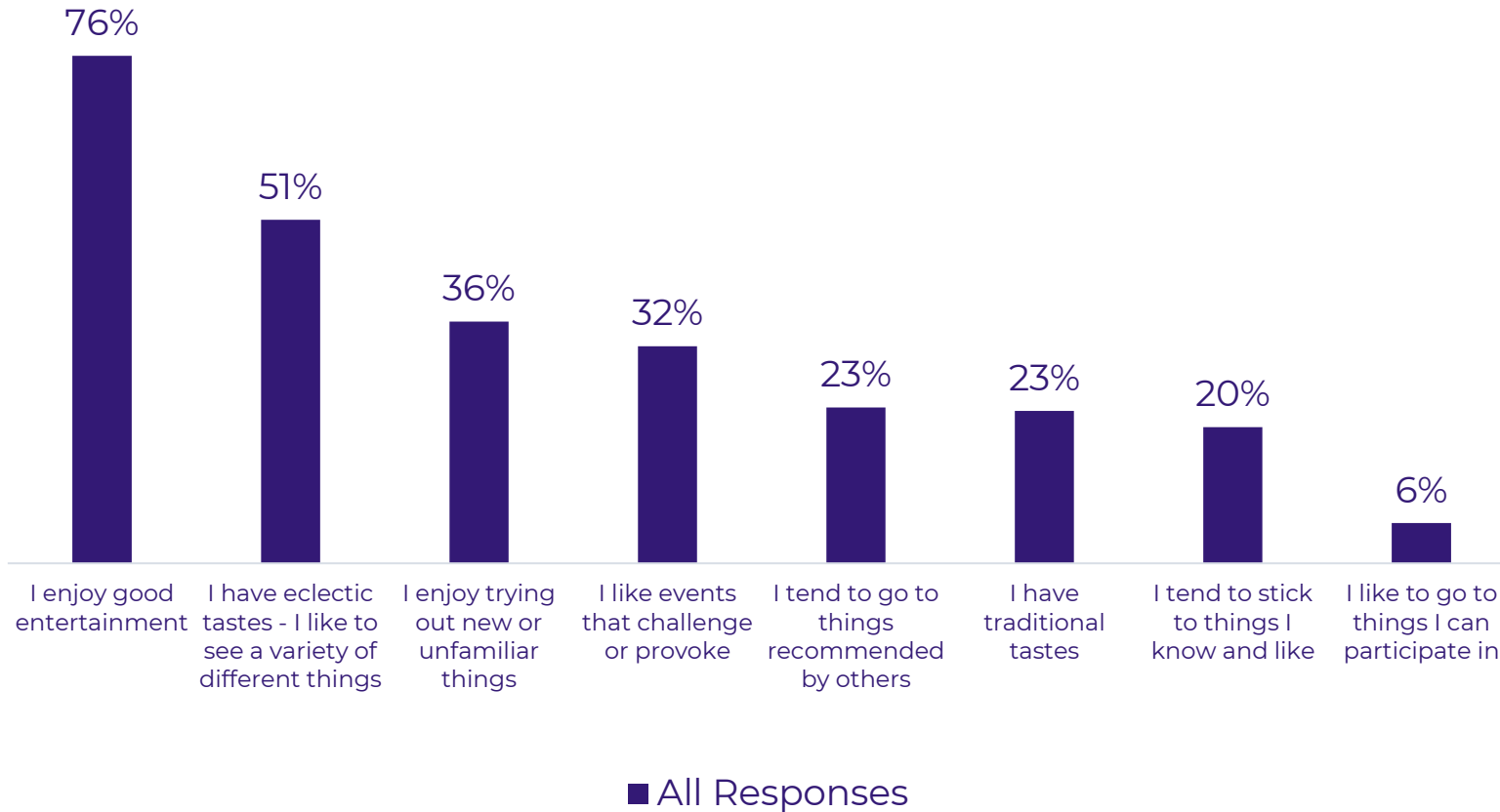
When would you say you last attended something cultural? (Select one)





3 in 4 respondents say they enjoy 'good entertainment'

Which of the following describe your artistic and cultural preferences? (Select all that apply)



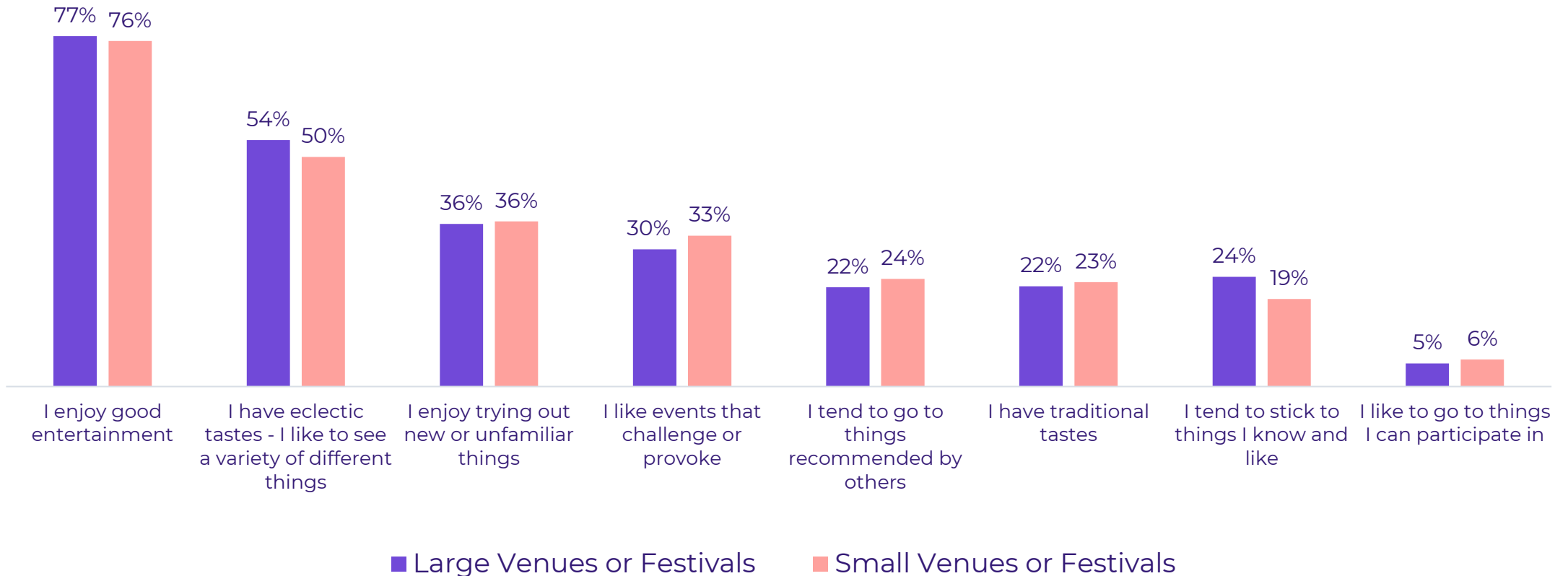
Artistic and cultural preferences

- 76% of respondents say they like 'good entertainment'.
- Half of respondents say they like to see 'a variety of different things.'
- Around a third enjoy trying new or unfamiliar things and a third like events which challenge or provoke.



Large organisations compared to small organisations

Which of the following describe your artistic and cultural preferences? (Select all that apply)

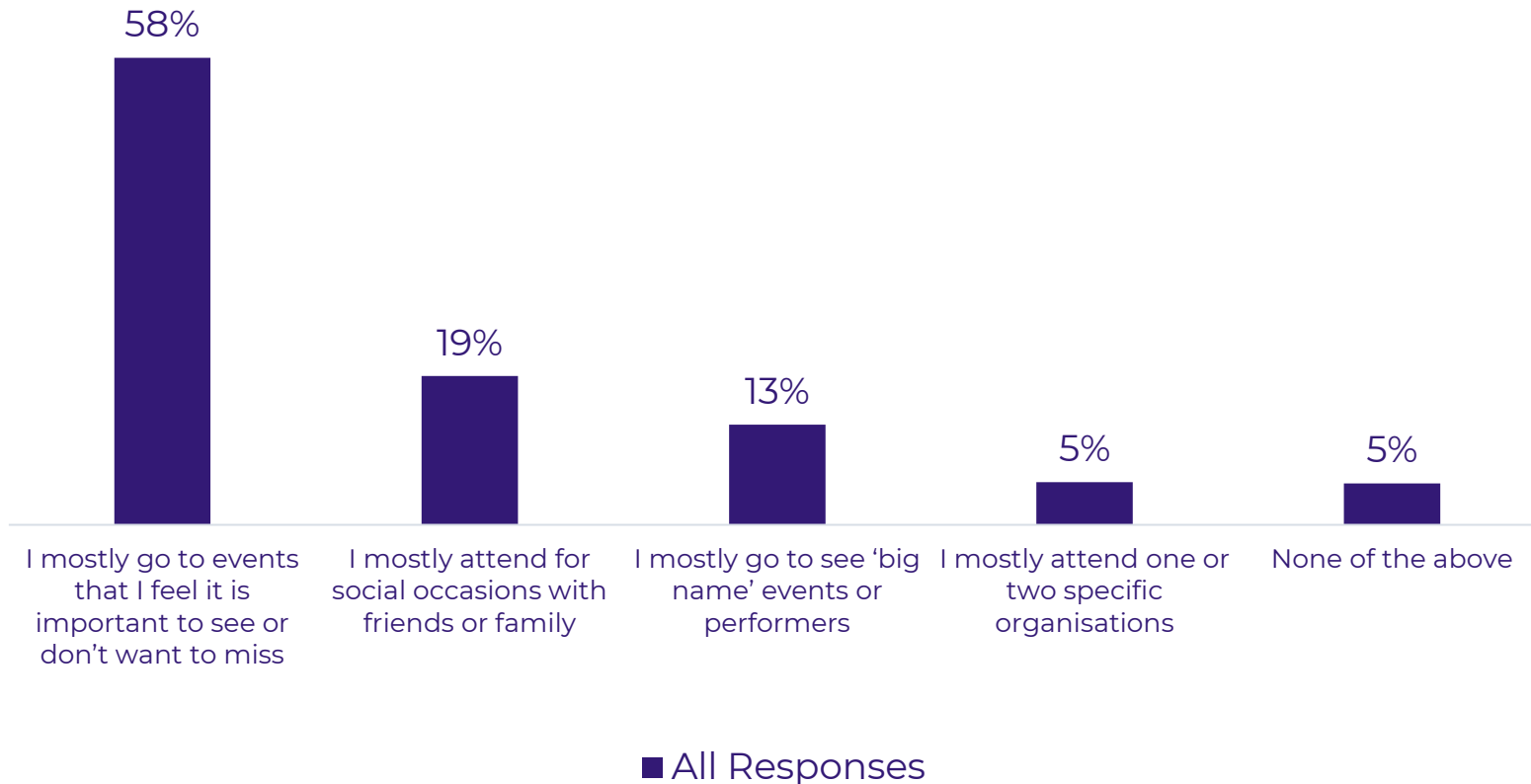




Behaviour

Not wanting to miss out on important events is a key driver of attendance

Which of the following phrases BEST describes how you currently attend arts and cultural events? (Select one)



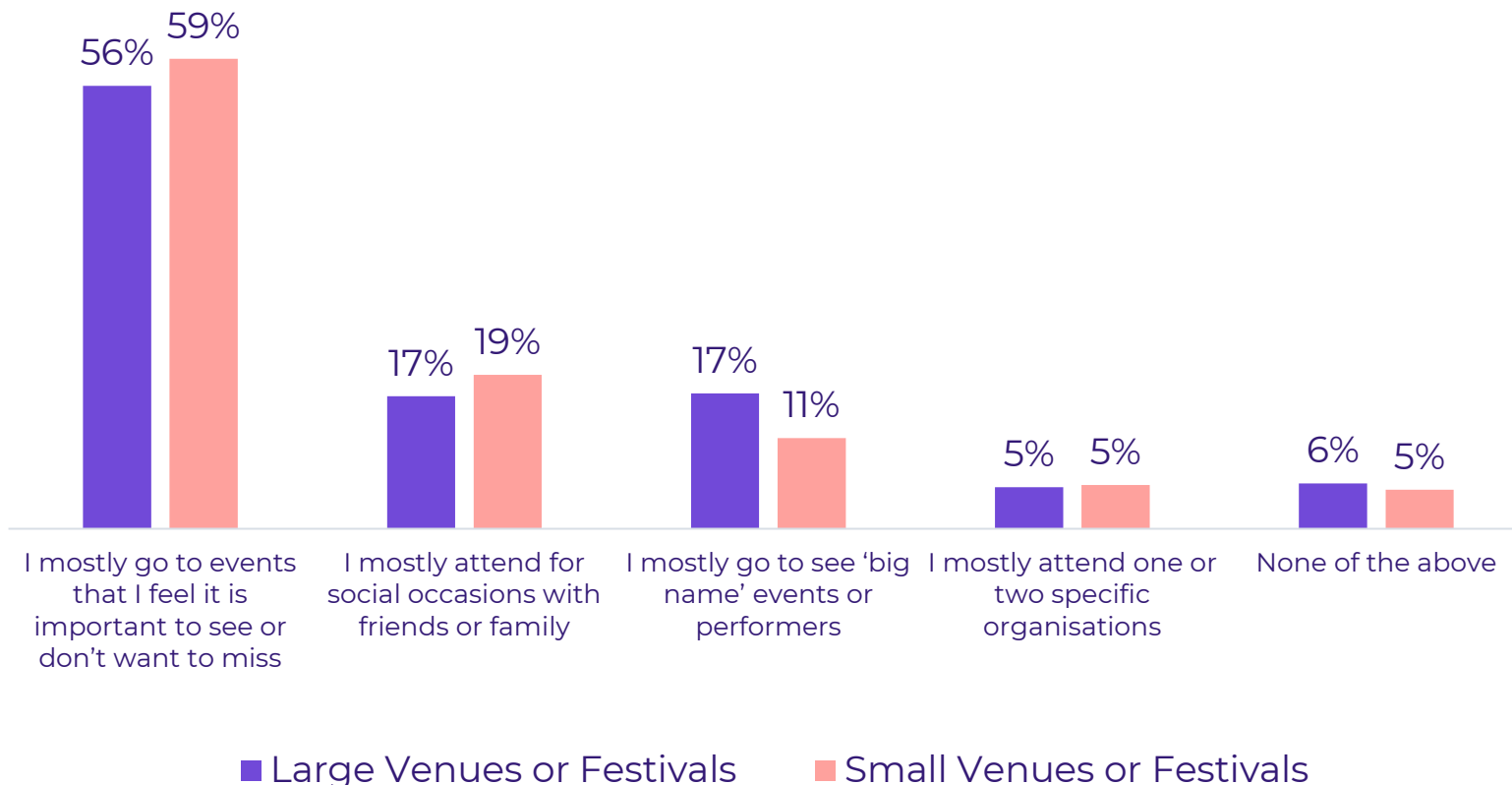
Artistic and cultural behaviour

- 58% of respondents say they mostly go to events they feel are important to see or don't want to miss.
- 1 in 5 respondents mostly attend for social reasons with friends or family.



Large organisations compared to small organisations

Which of the following phrases BEST describes how you currently attend arts and cultural events? (Select one)



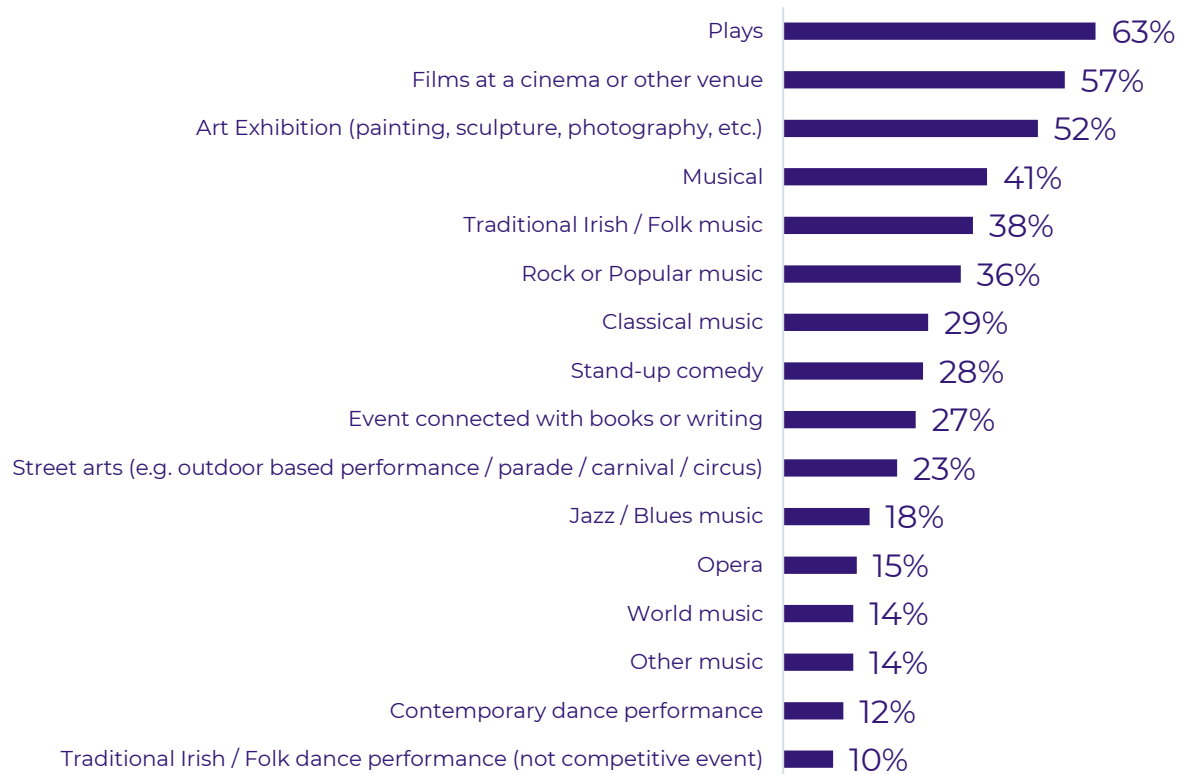
Artistic and cultural behaviour

- Those attending large venues or festivals are more likely to be motivated by going to see 'big name' events or performers.



Plays, films and art exhibitions are the most popular artforms among survey respondents

Which artforms did you attend last year (2022)? (Select all that apply)



■ All Responses

Artforms under 10% not included

Attendance at different artforms

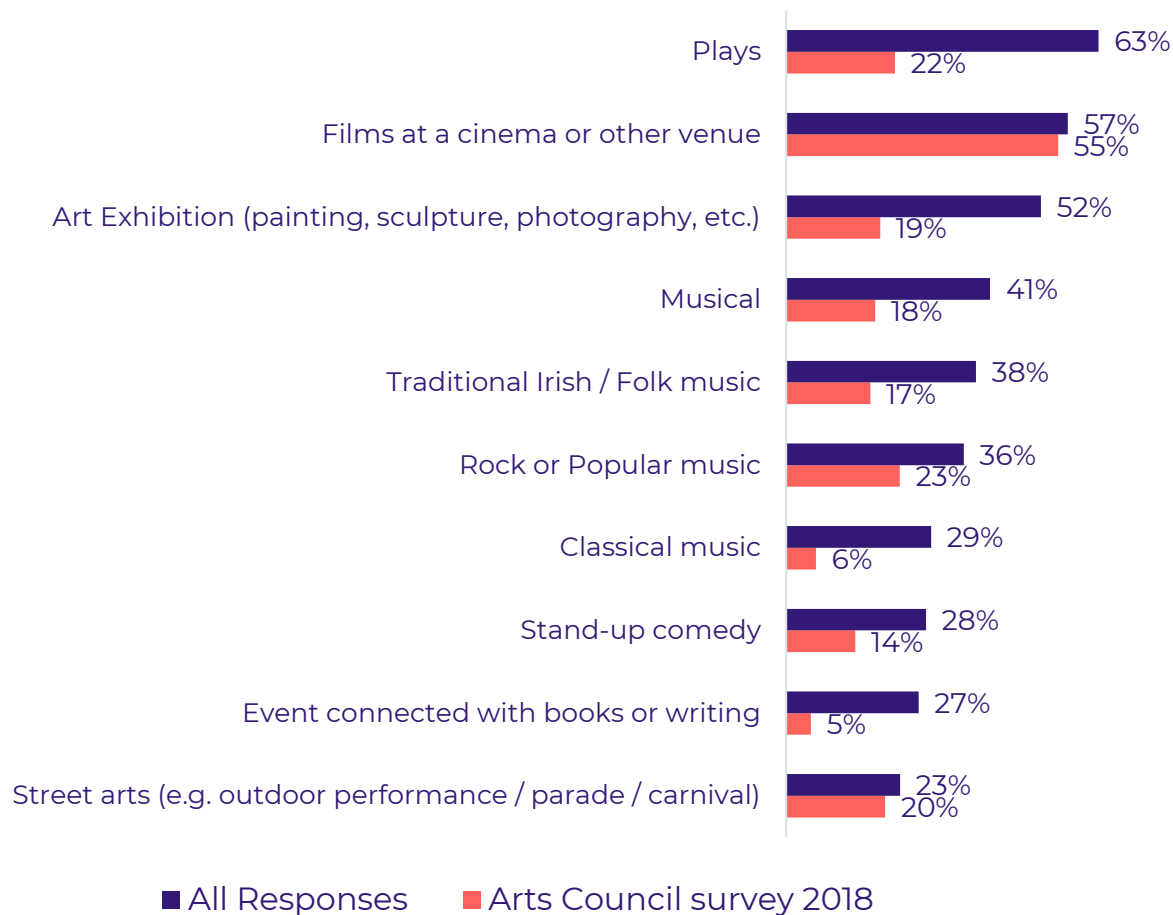
- 63% of respondents said they saw a play in 2022.
- More than half said they saw a film at the cinema and attended an art exhibition.



Comparison with attendance of general population

Which artforms did you attend last year?

(Select all that apply)



Attendance at different artforms

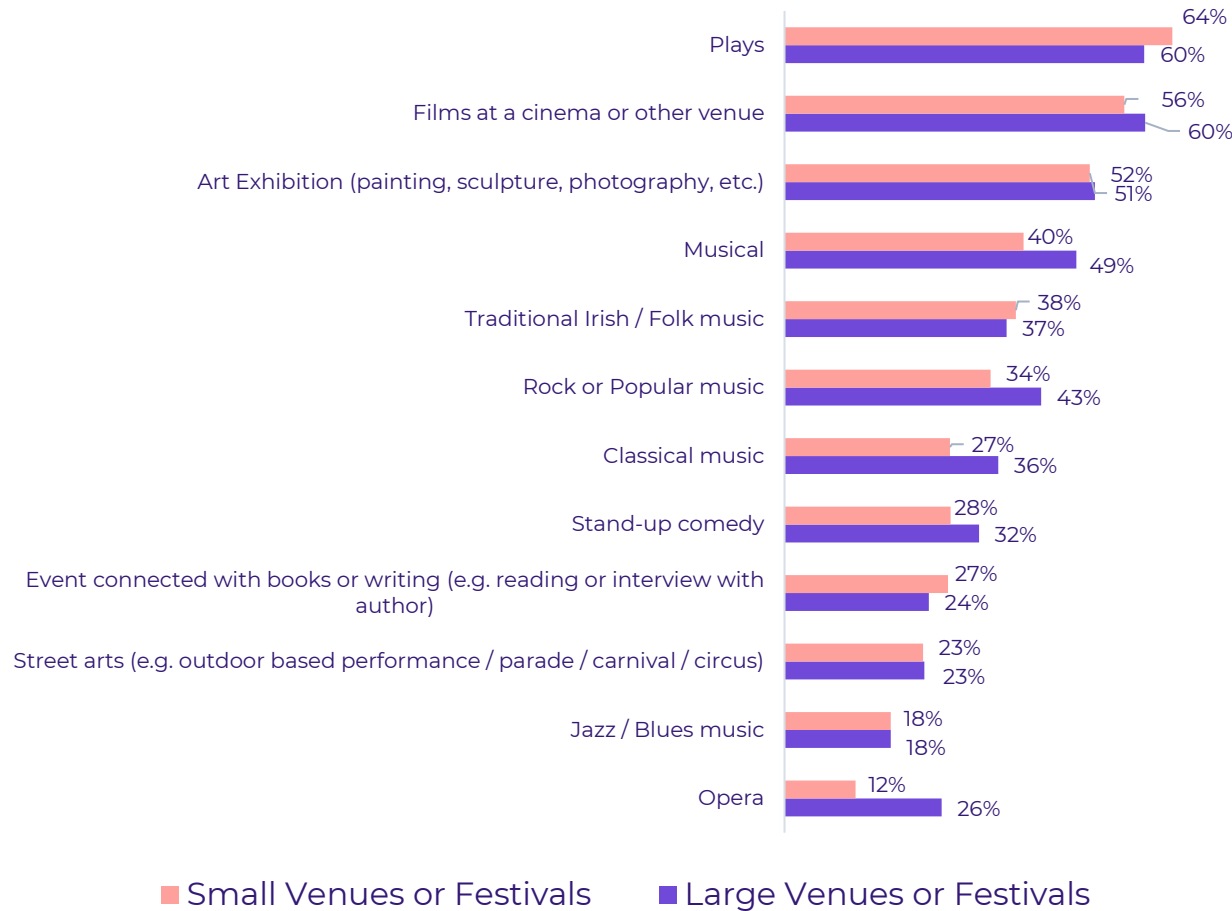
- Survey respondents are more likely to have attended every different artform compared to general population asked in 2018.
- Attendance at cinema and street arts are most similar across the two groups.

Artforms under 20% in both surveys not included



Large organisations compared to small organisations

Which artforms did you attend last year (2022)? (Select all that apply)



Artforms under 20% in both groups not included

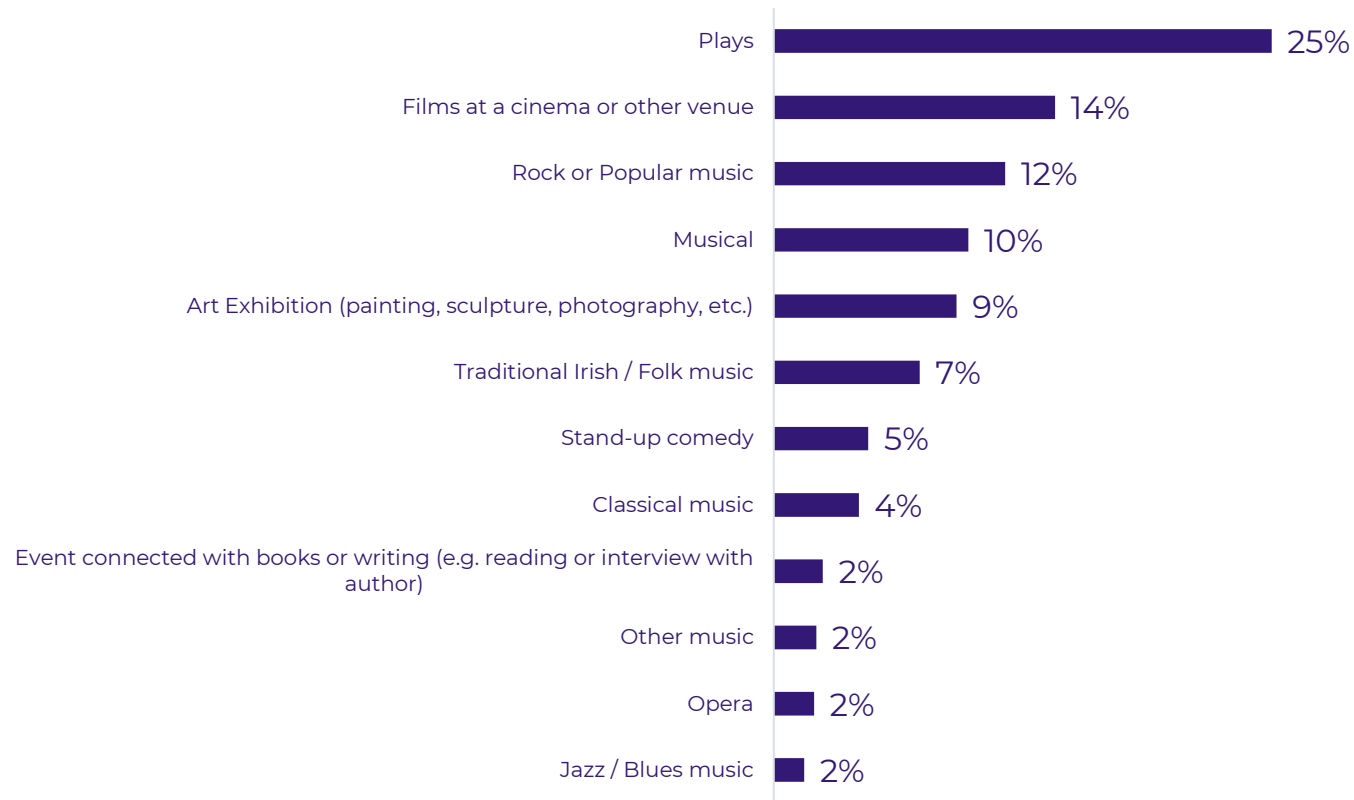
Attendance at different artforms

- Respondents who attend large venues or festivals are more likely to attend musicals, opera and rock and pop.



Plays are most frequently attended artform for 1 in 4 respondents

Which of these would you say you have attended most frequently? (Select one)



■ All Responses

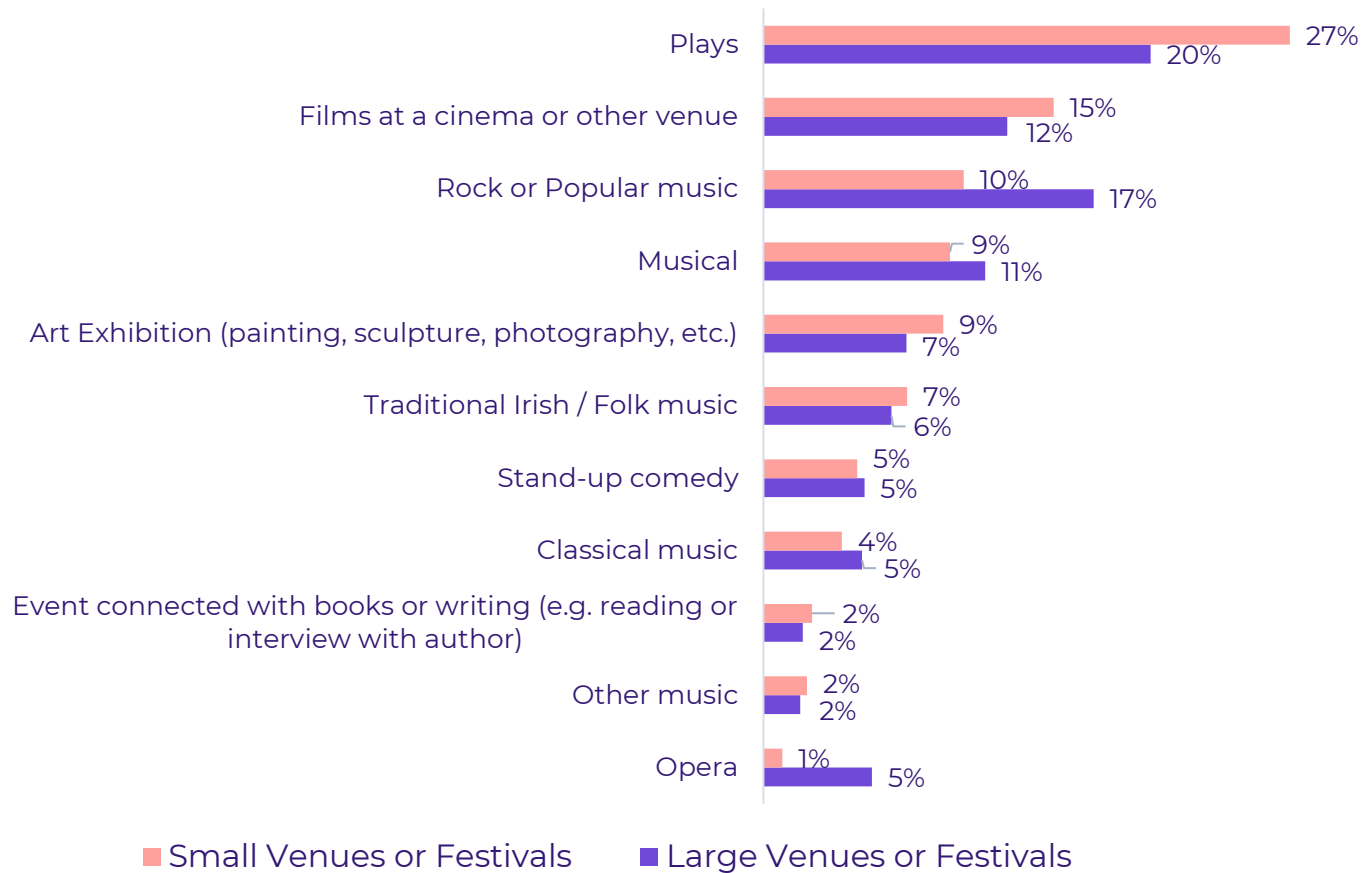
Attendance at different artforms

- Plays are the most frequently attended artform, with 25% of respondents saying they attended plays most frequently in 2022.



Large organisations compared to small organisations

Which of these would you say you have attended most frequently? (Select one)



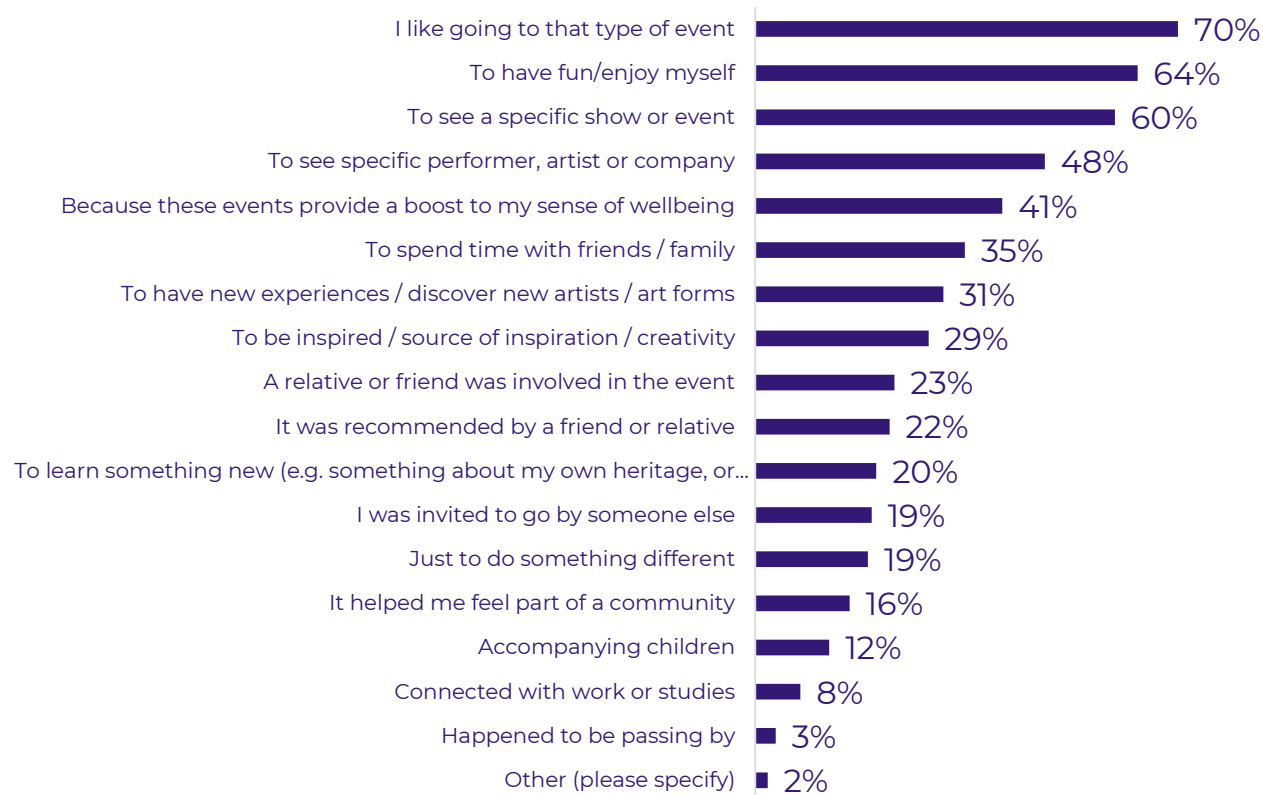
Attendance at different artforms

- Attendees of events at large venues or festivals are more likely to select rock and pop, musicals and opera as artforms they attended most frequently.



Attendance at particular types of events and having fun are the key reasons for attending

If you can remember, what were your reasons for attending cultural events in 2022? (Select all that apply)



■ All Responses

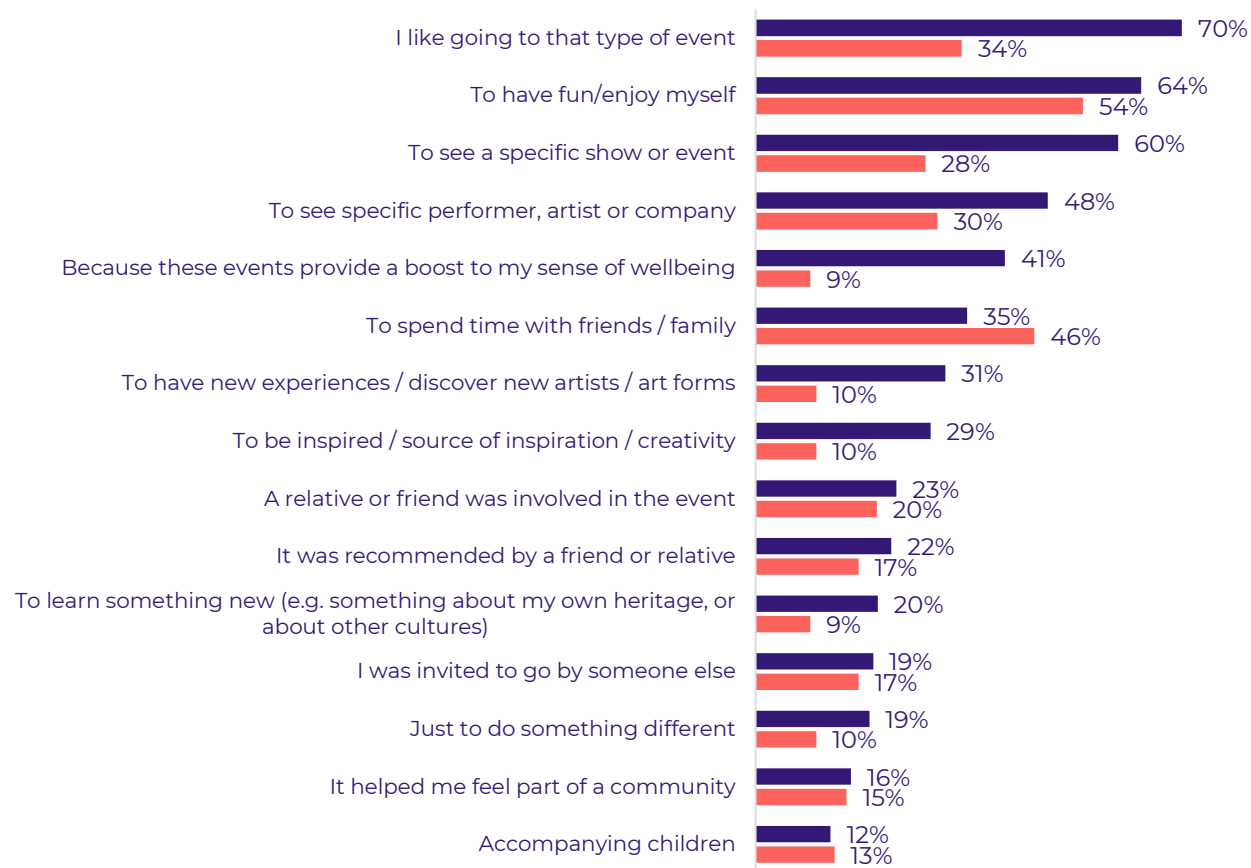
Reasons for attending cultural events

- Attendees of events at large venues or festivals are more likely to select rock and pop, musicals and opera as artforms they attended most frequently.



For the general population, social reasons are more important factors in attending

If you can remember, what were your reasons for attending cultural events? (Select all that apply)



Responses under 10% not included

■ All Responses ■ Arts Council survey 2018

Reasons for attending cultural events

- For the general population, having fun and spending time with friends and family are the main reasons for attending cultural events.
- Regular attenders are more likely to be motivated by new experiences, a boost to their wellbeing and to see particular performers or types of events.



Large organisations compared to small organisations

If you can remember, what were your reasons for attending cultural events in 2022? (Select all that apply)



Responses under 10% not included

Reasons for attending cultural events

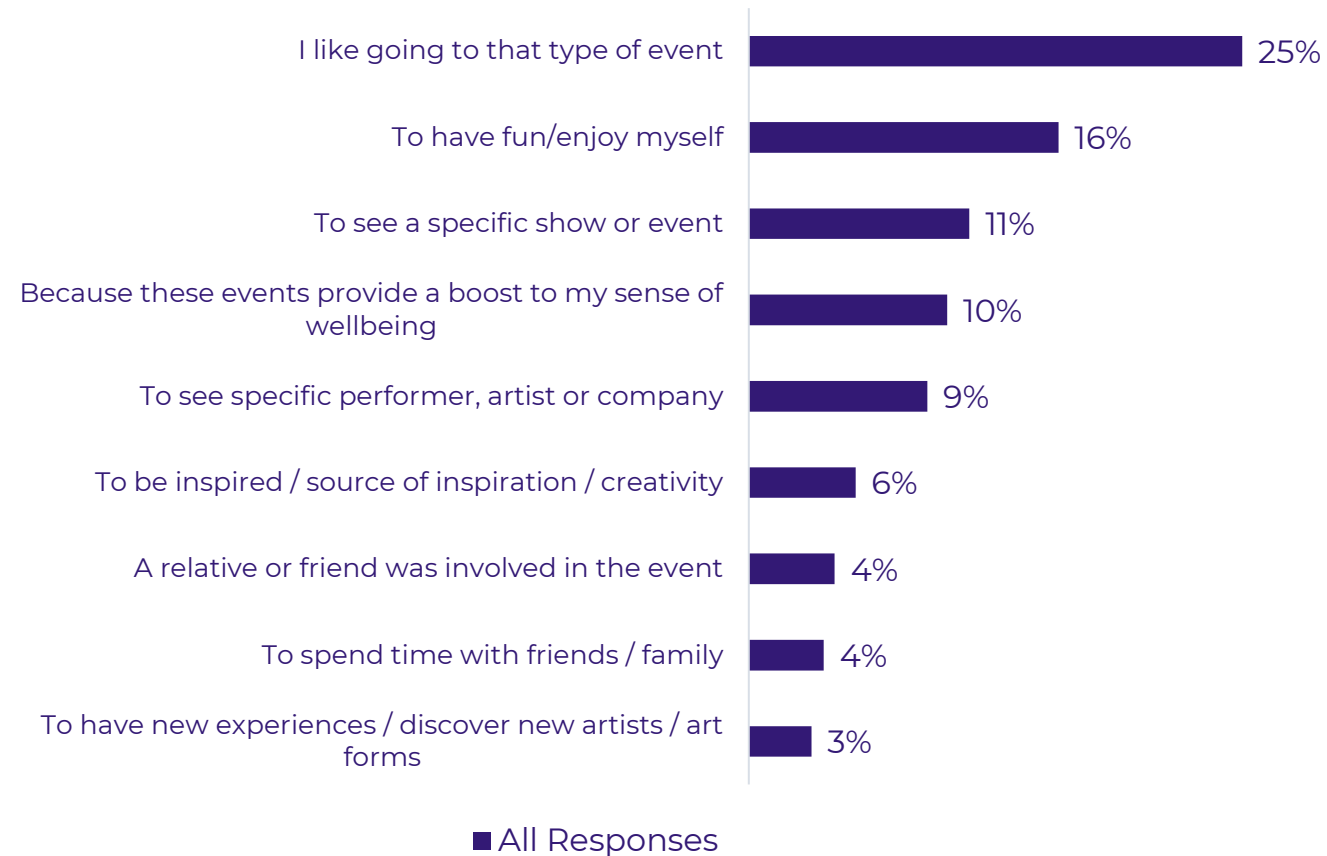
- Attendees at large events or festivals are more likely to be motivated by specific show or event, or seeing a specific performer, artist or company.



Attitude

1 in 4 people are mainly motivated by attending a particular type of event

What was your MAIN reason for attending cultural events in 2022? (Select one)



Responses under 3% not included



Large organisations compared to small organisations

What was your MAIN reason for attending cultural events in 2022? (Select one)

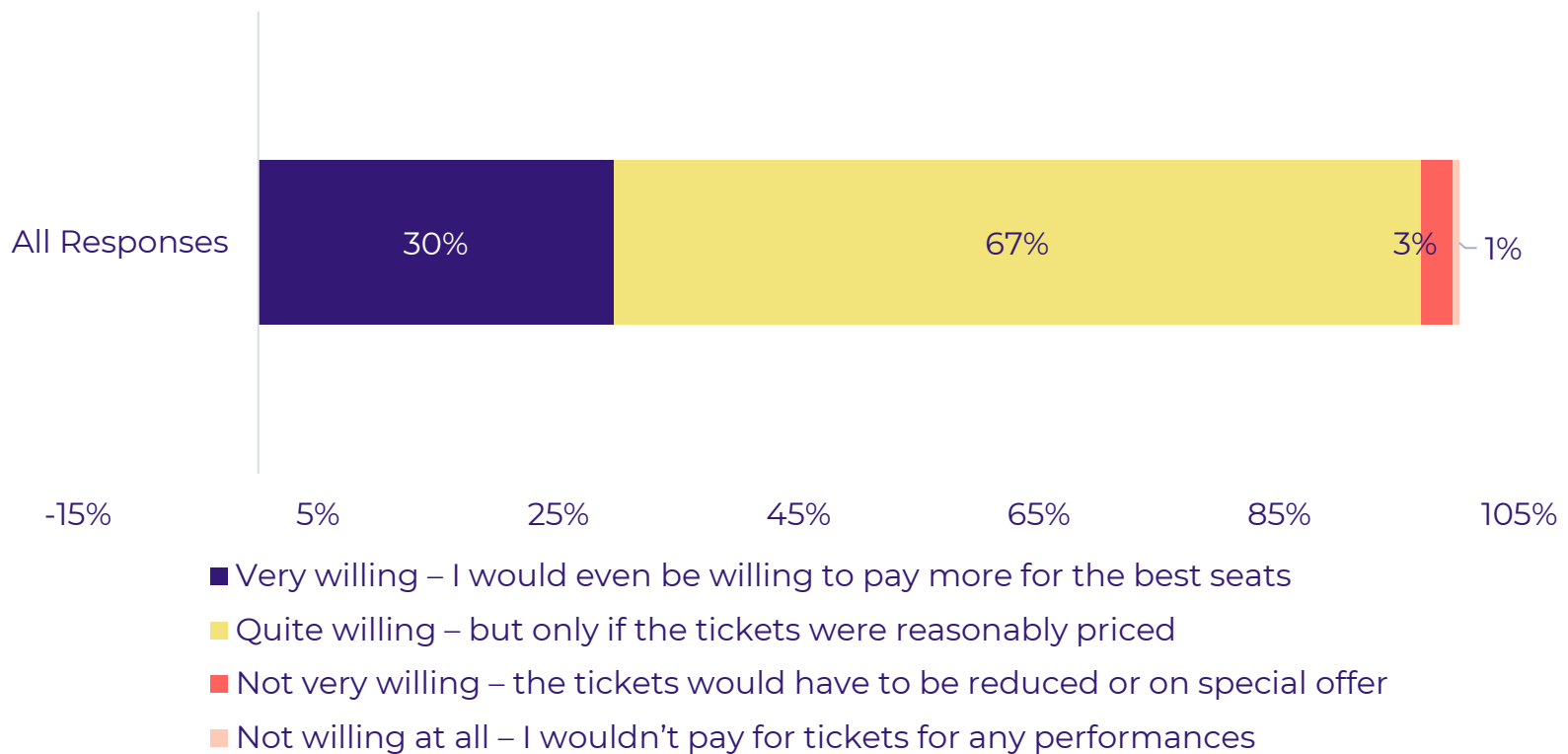


Reasons for attending cultural events



Majority of attenders willing to pay for reasonably priced tickets at the moment

Thinking specifically about the performing arts (theatre, dance, etc), how willing would you say you are to pay for tickets at the moment?



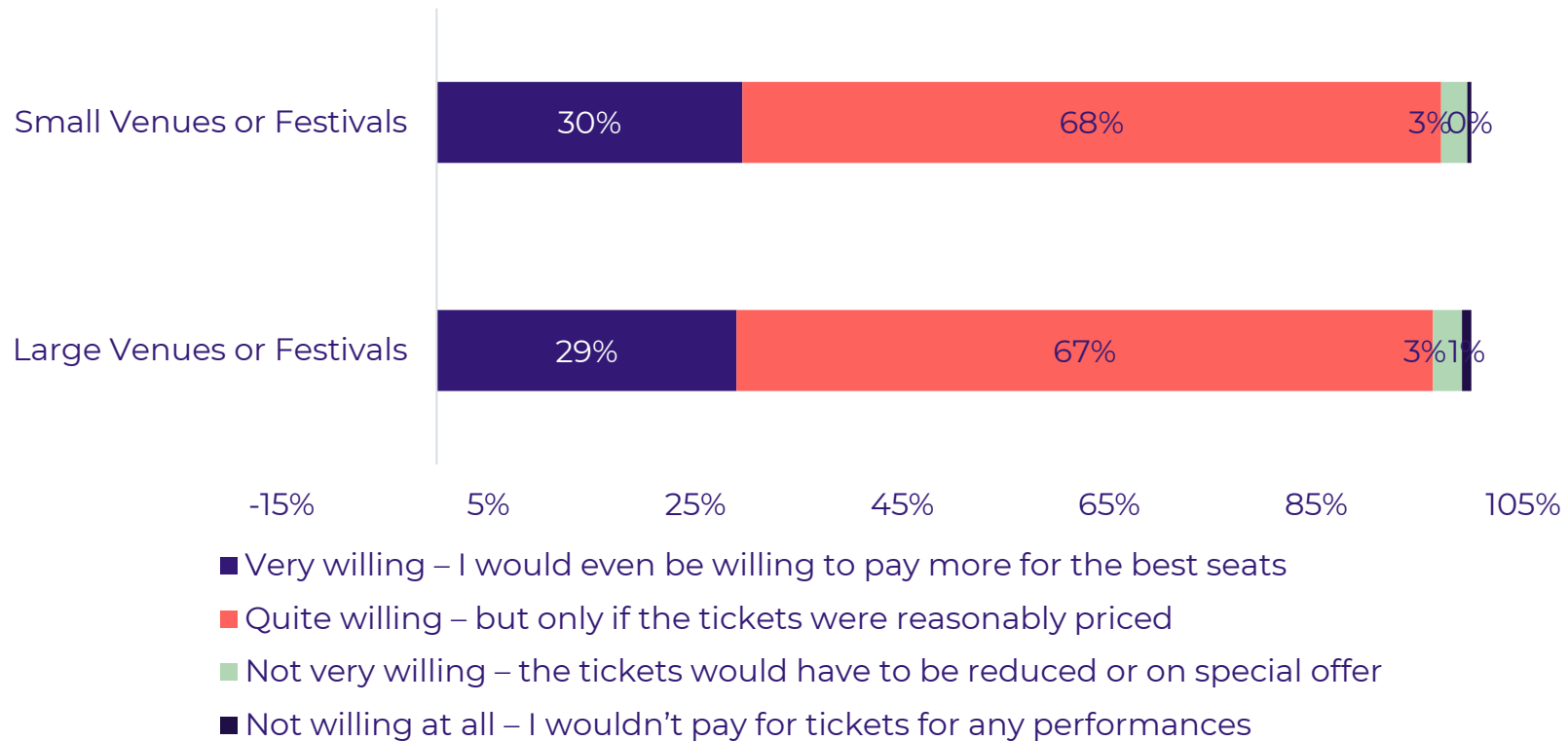
Willingness to pay for tickets

- 30% of respondents are very willing to pay for tickets – even paying more for the best price.
- 67% are quite willing – as long as the pricing is reasonable.
- Only 4% say they are not very or not at all willing to pay for tickets.



Large organisations compared to small organisations

Thinking specifically about the performing arts (theatre, dance, etc), how willing would you say you are to pay for tickets at the moment?

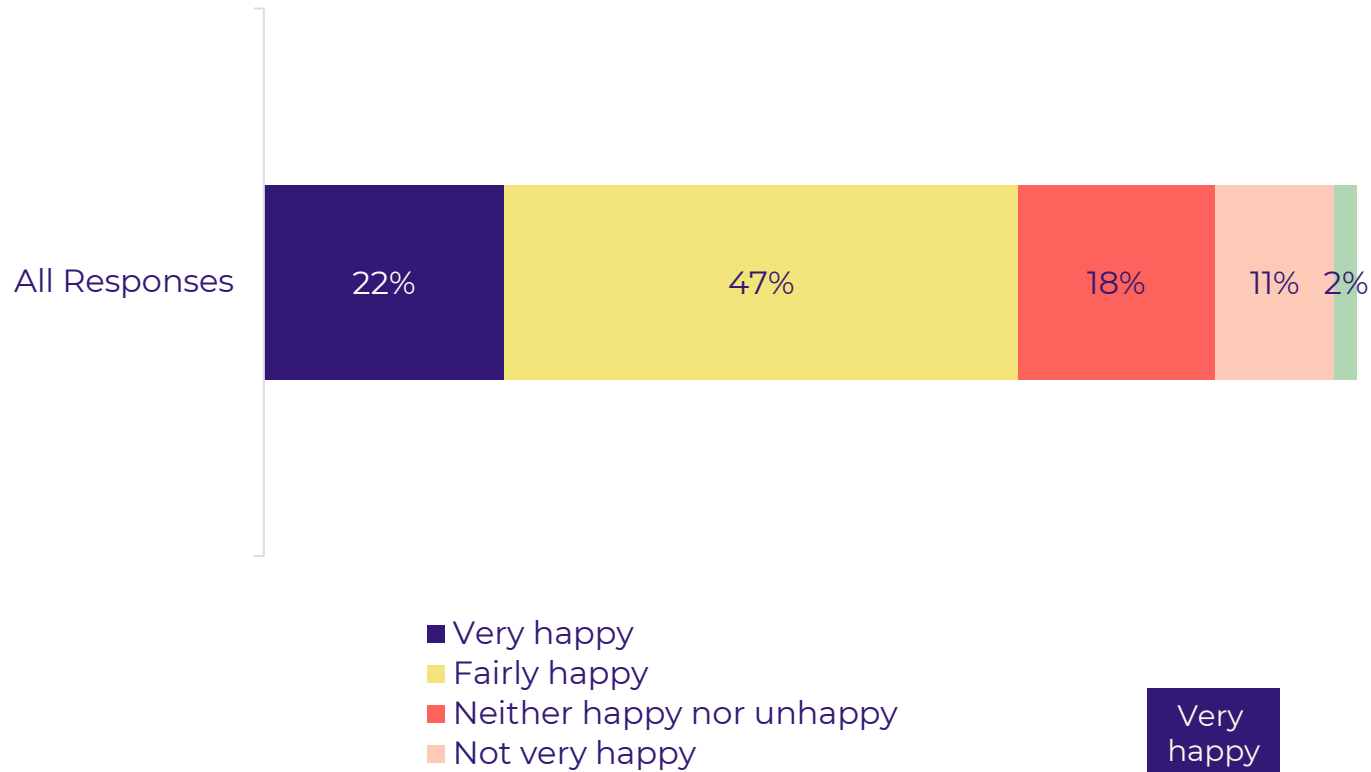




Attitude

Respondents are fairly happy with their level of attendance

How happy or not are you with how often you attend cultural events in your leisure time?



Level of attendance

- Nearly 70% of respondents are happy with how often they attend cultural events.
- However, only 22% are totally satisfied with their level of attendance.
- 13% are unhappy with their level of attendance.

Not happy at all

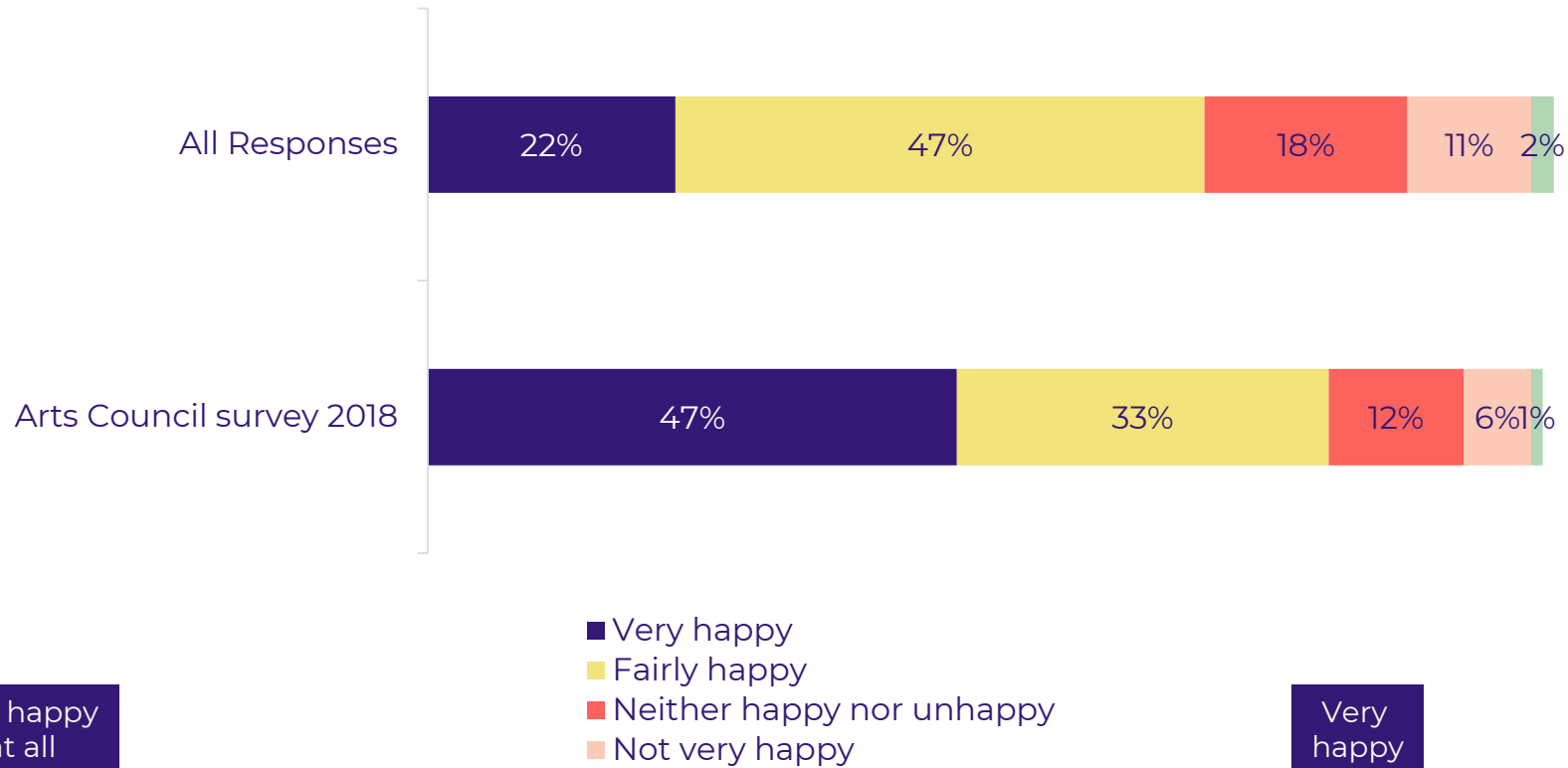
Very happy



Attitude

Comparison with the general population

How happy or not are you with how often you attend cultural events in your leisure time?



Level of attendance

- Although attending less frequently, almost half of respondents from the general public very happy with their level of attendance.
- Only 7% are not happy with their attendance.



Attitude

Lack of time and choice are main barriers to attending more often

What are some of the reasons for you not attending arts events more often? (Select all that apply)



Barriers to attendance

- Although attending less frequently, almost half of respondents from the general public very happy with their level of attendance.
- Only 7% are not happy with their attendance.



Large organisations compared to small organisations

What are some of the reasons for you not attending arts events more often? (Select all that apply)

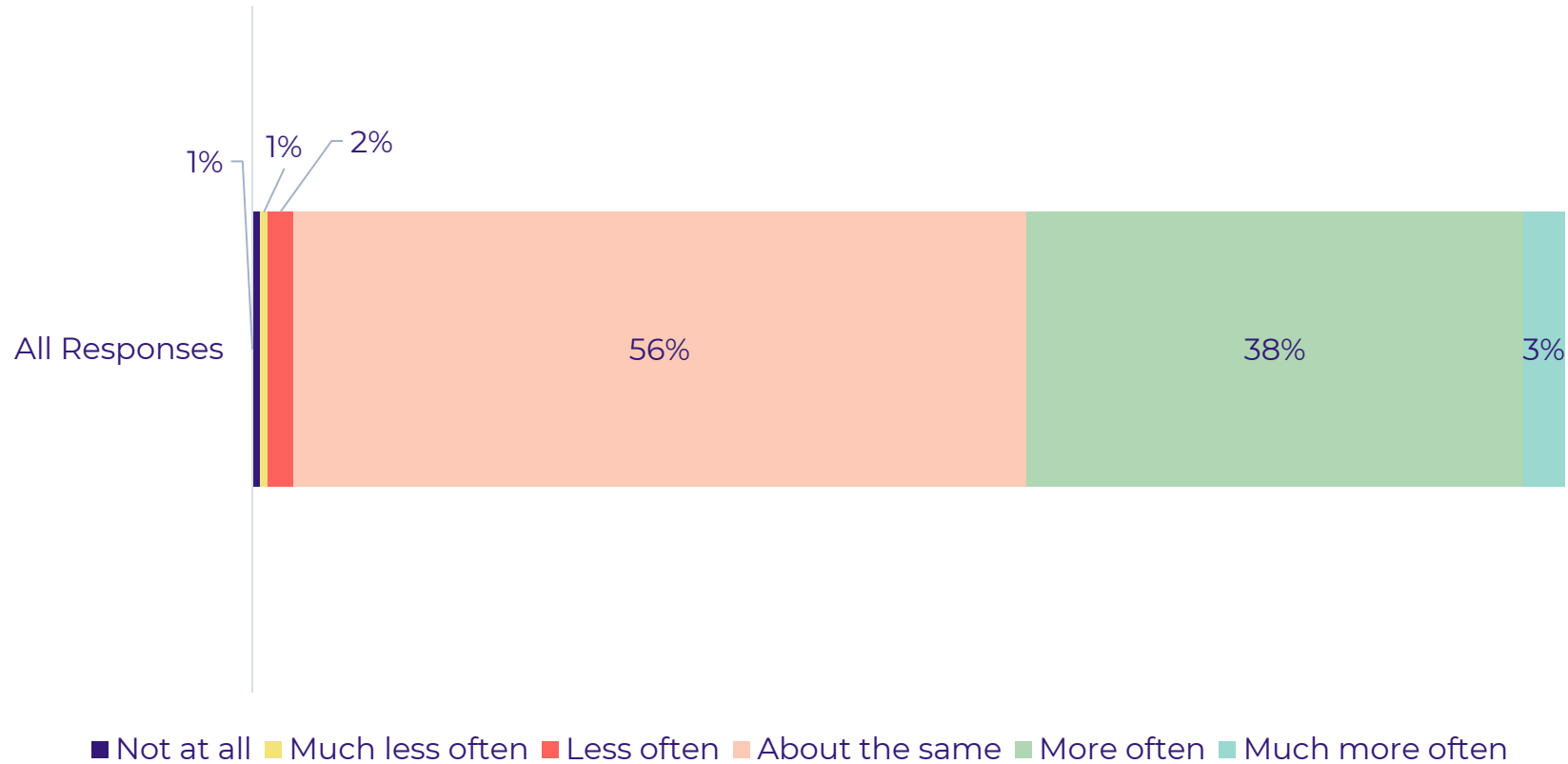




Behaviour

Respondents plan to attend more often in the next 12 months

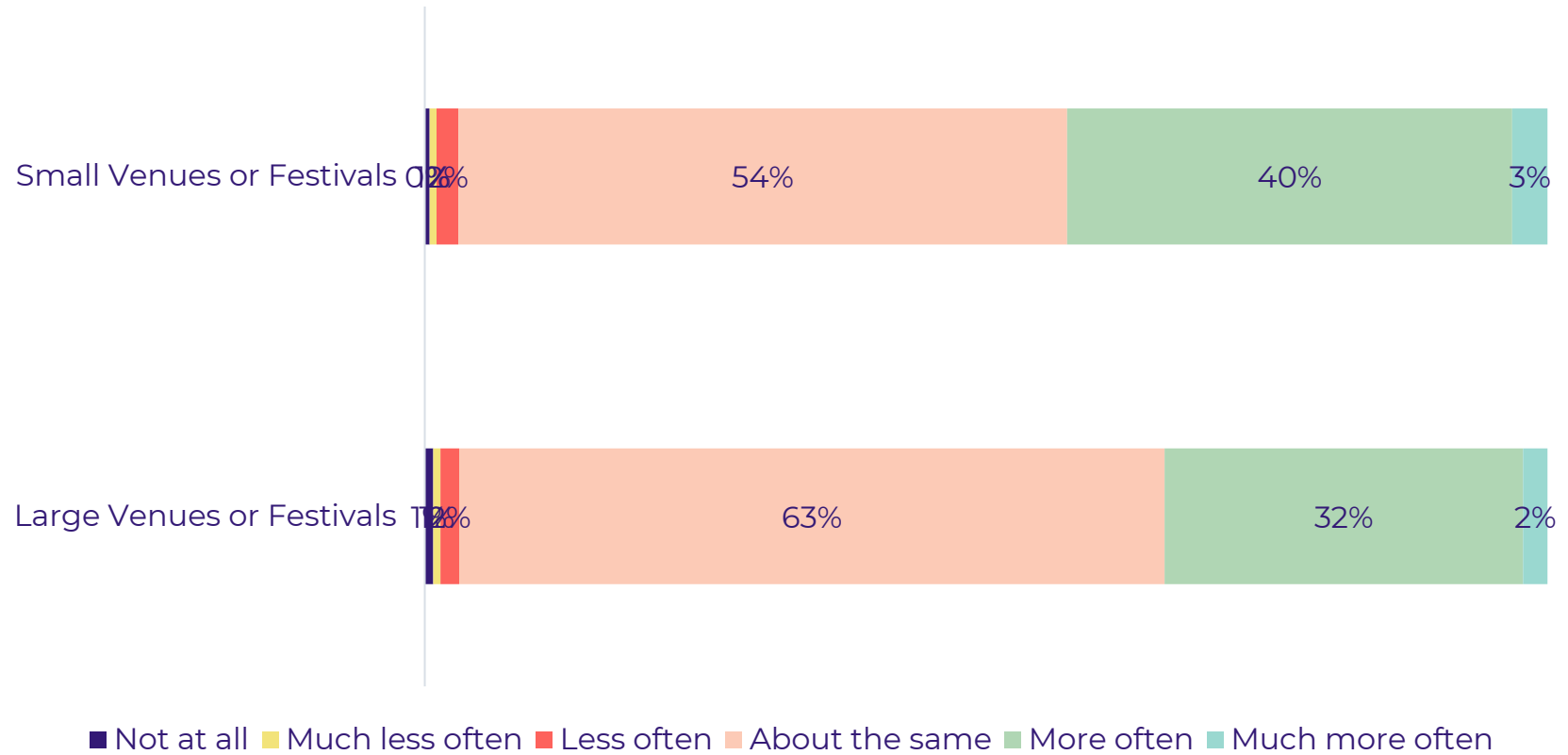
In the next 12 months, how often do you expect to attend the organisation compared to the last 12 months?





Large organisations compared to small organisations

In the next 12 months, how often do you expect to attend the organisation compared to the last 12 months?

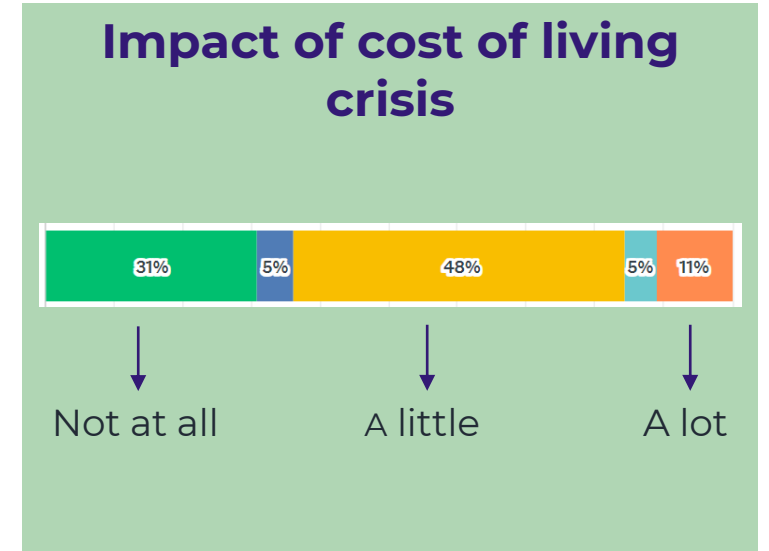
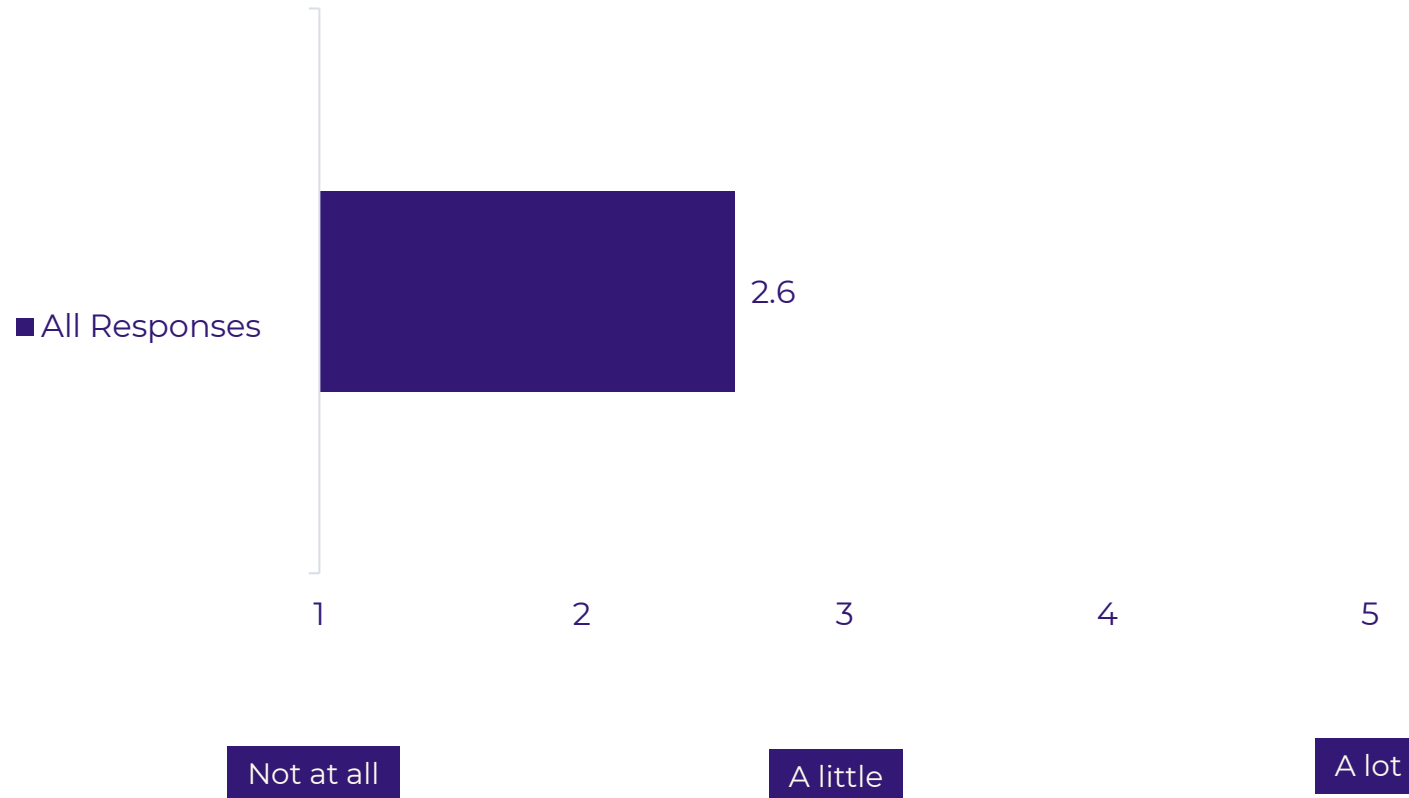




Attitude

Respondents say their attendance is being influenced 'a little' by the cost of living crisis

To what extent is your attendance being influenced by the current cost of living and economic crisis?





Attitude

Large organisations compared to small organisations

To what extent is your attendance being influenced by the current cost of living and economic crisis?



Related to the organisation

How are audiences behaving in relation to the organisation who sent them the survey?

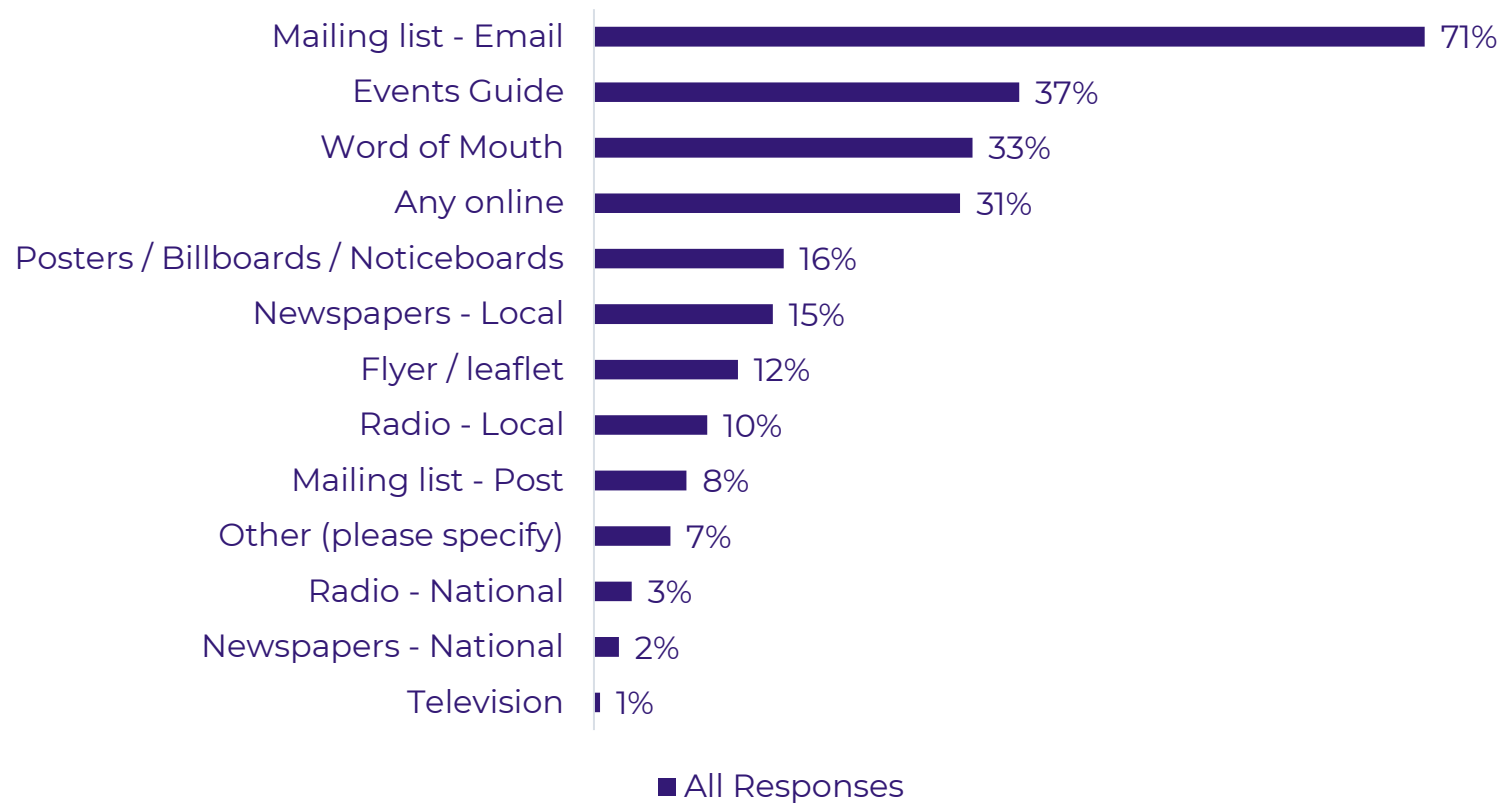
What do they think about the organisation and what impact does it have on them?





Majority of respondents find out about events through email mailing lists

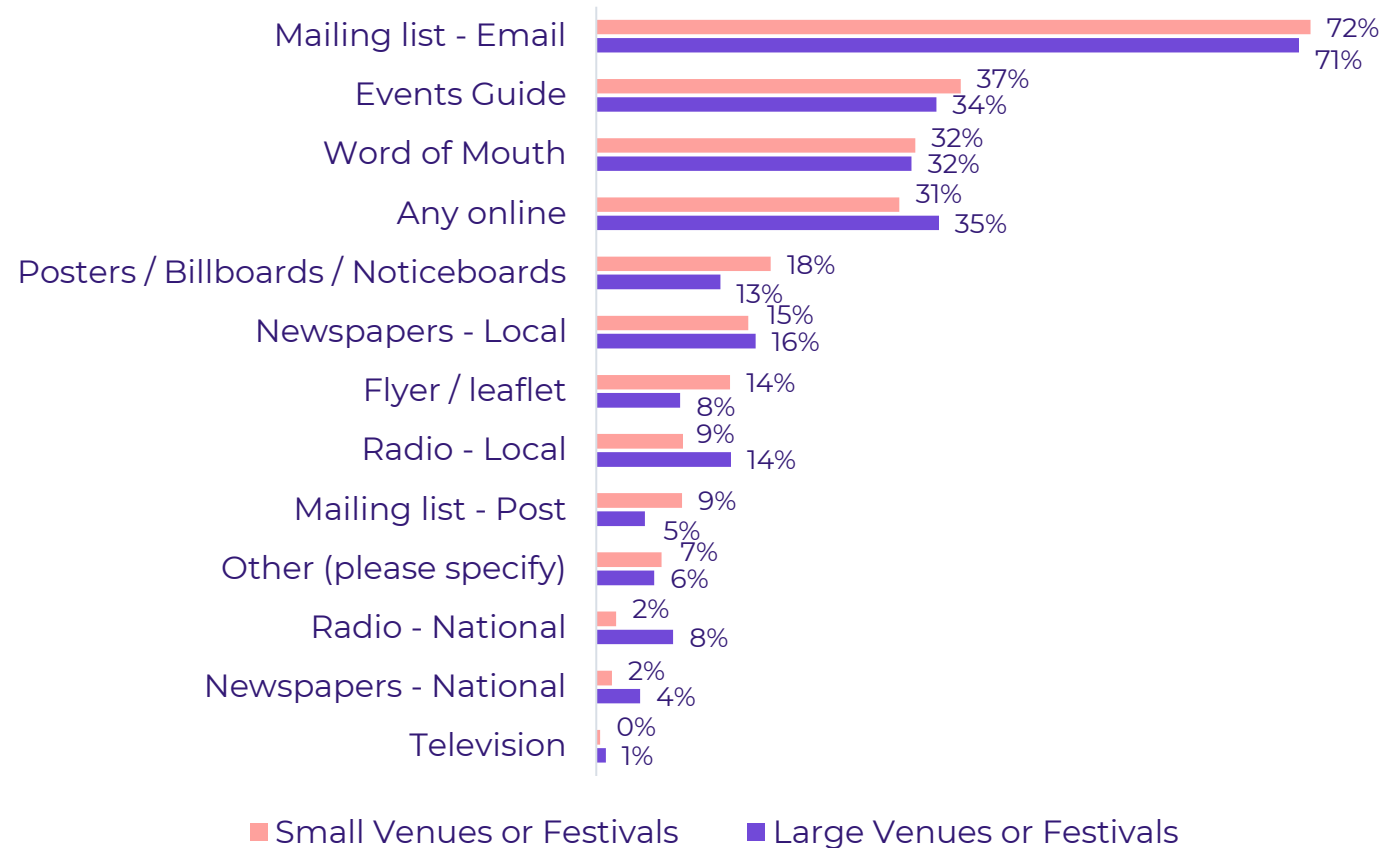
**How do you usually find out about events at this organisation?
(Please select all that apply)**





Large organisations compared to small organisations

How do you usually find out about events at this organisation? (Please select all that apply)

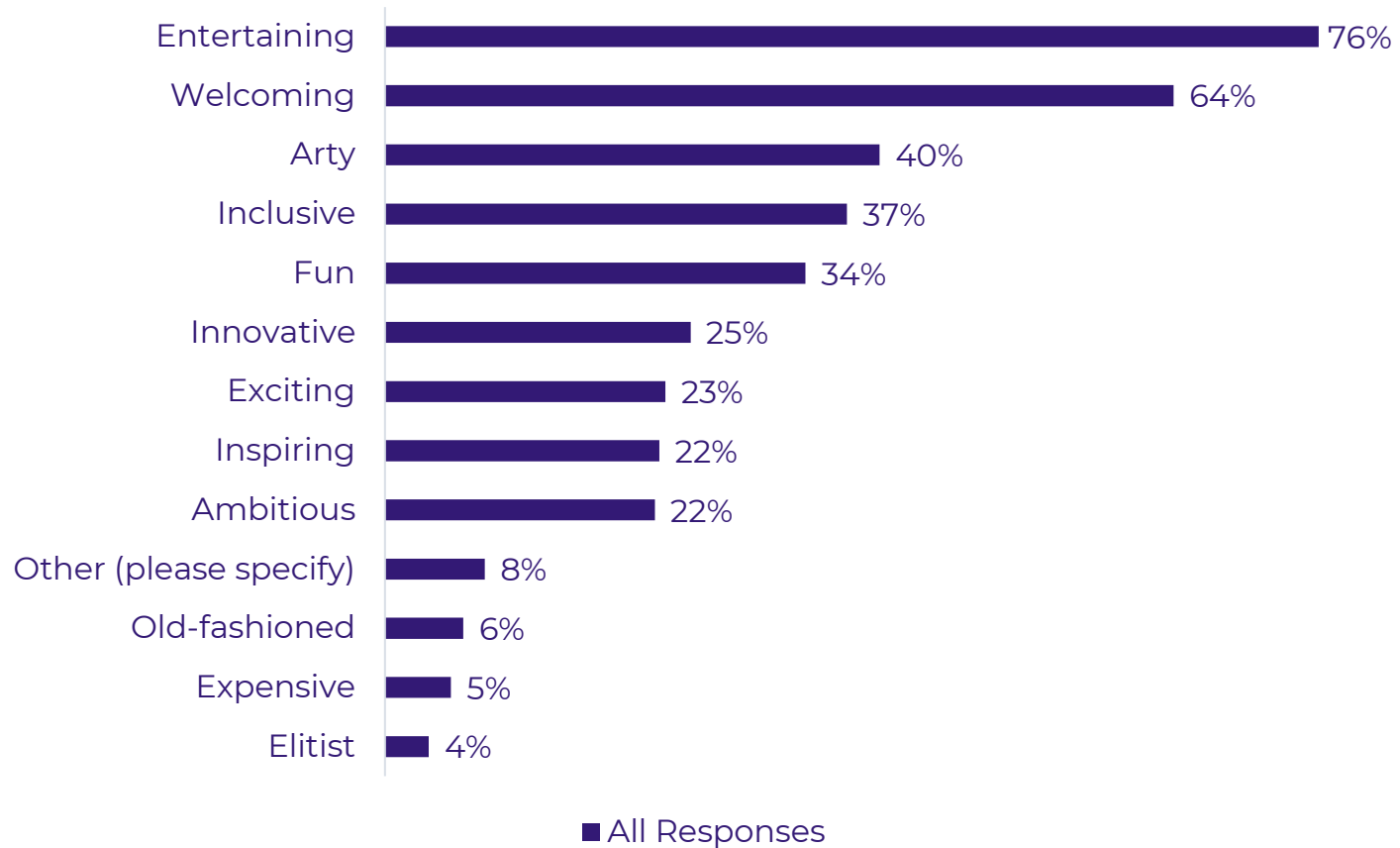




Attitude

'Entertaining' and 'welcoming' are the most common words used to describe the organisation

Which of the following words do you think describes the organisation? (Select all that apply)

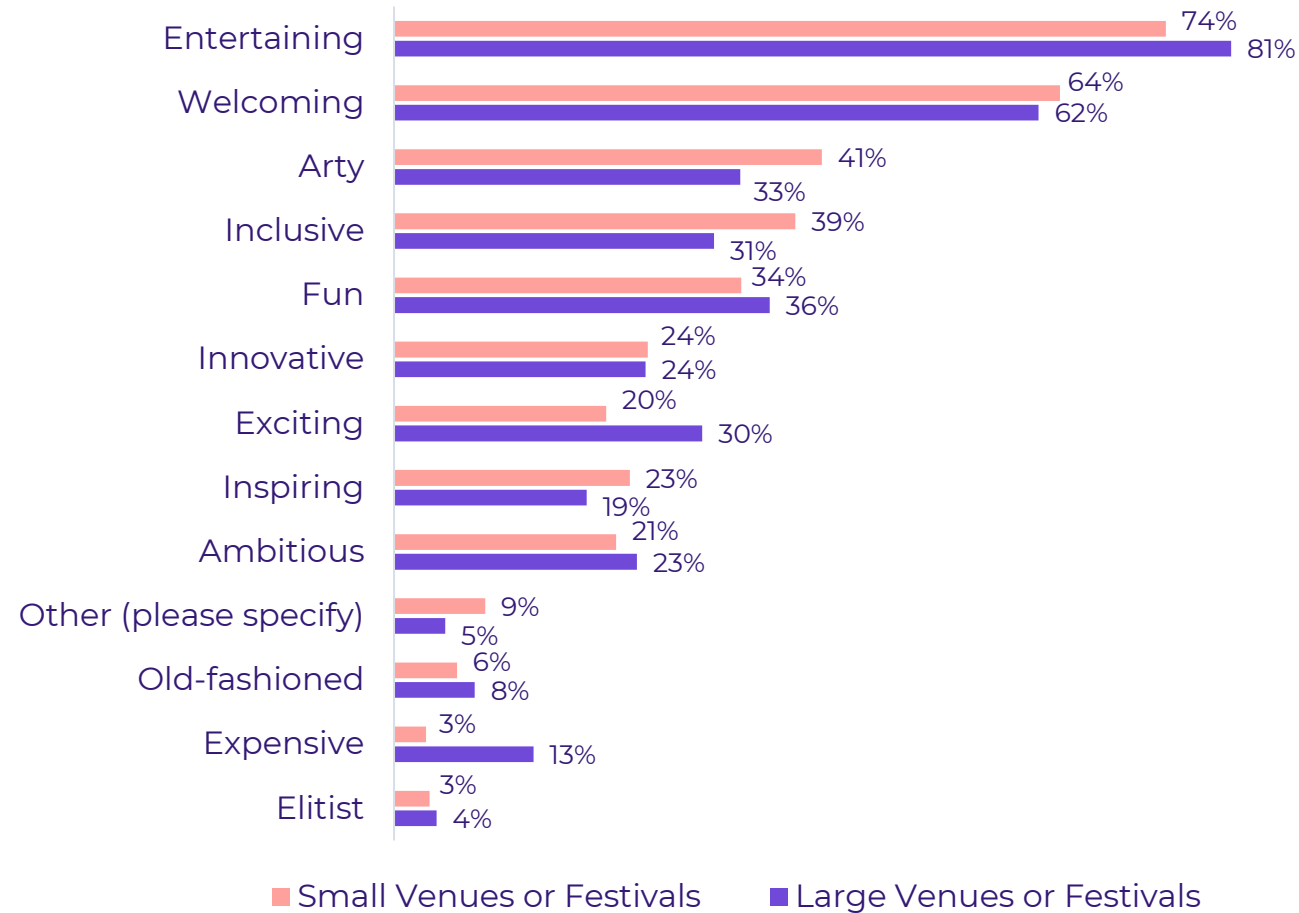




Attitude

Large organisations compared to small organisations

Which of the following words do you think describes the organisation? (Select all that apply)

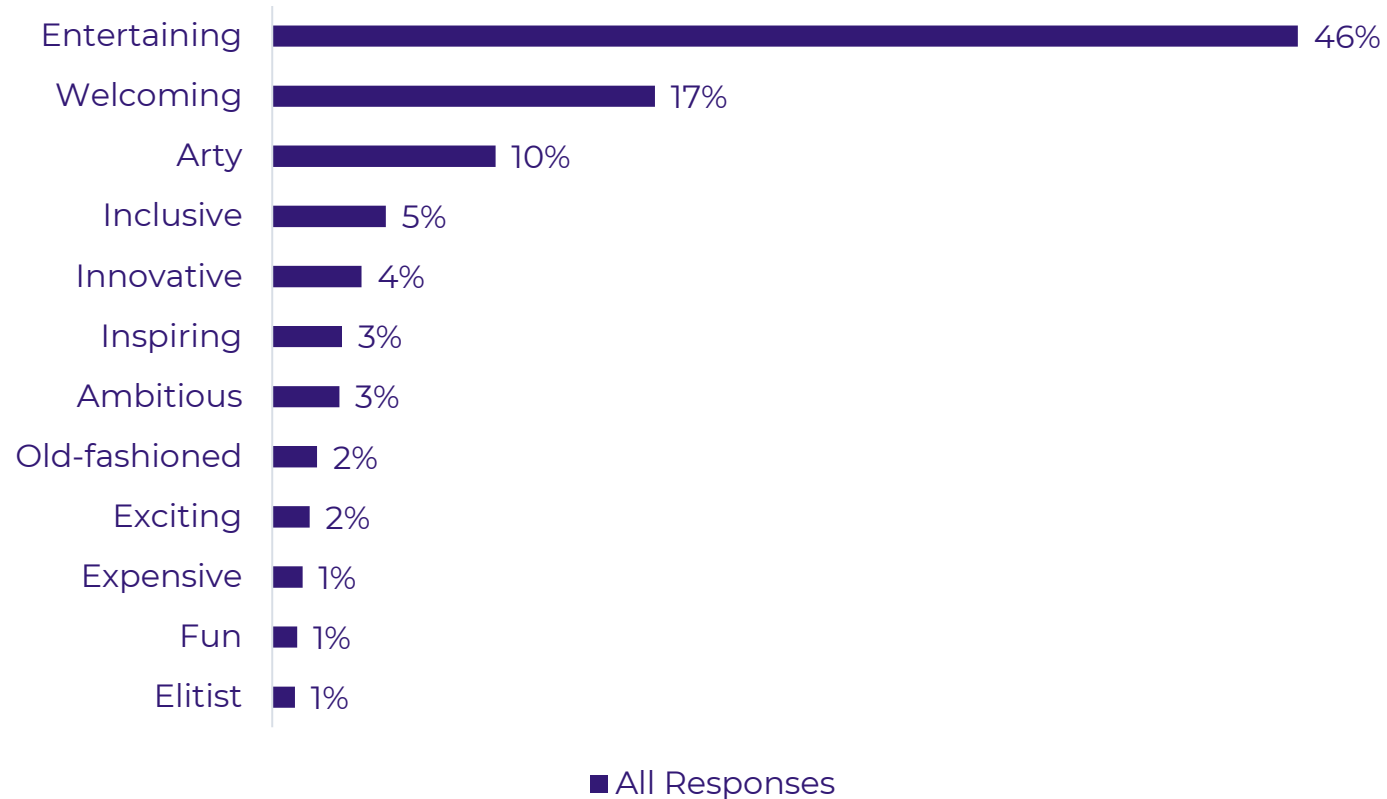




Attitude

Almost half are most likely to use 'Entertaining' to describe the organisation who sent the survey

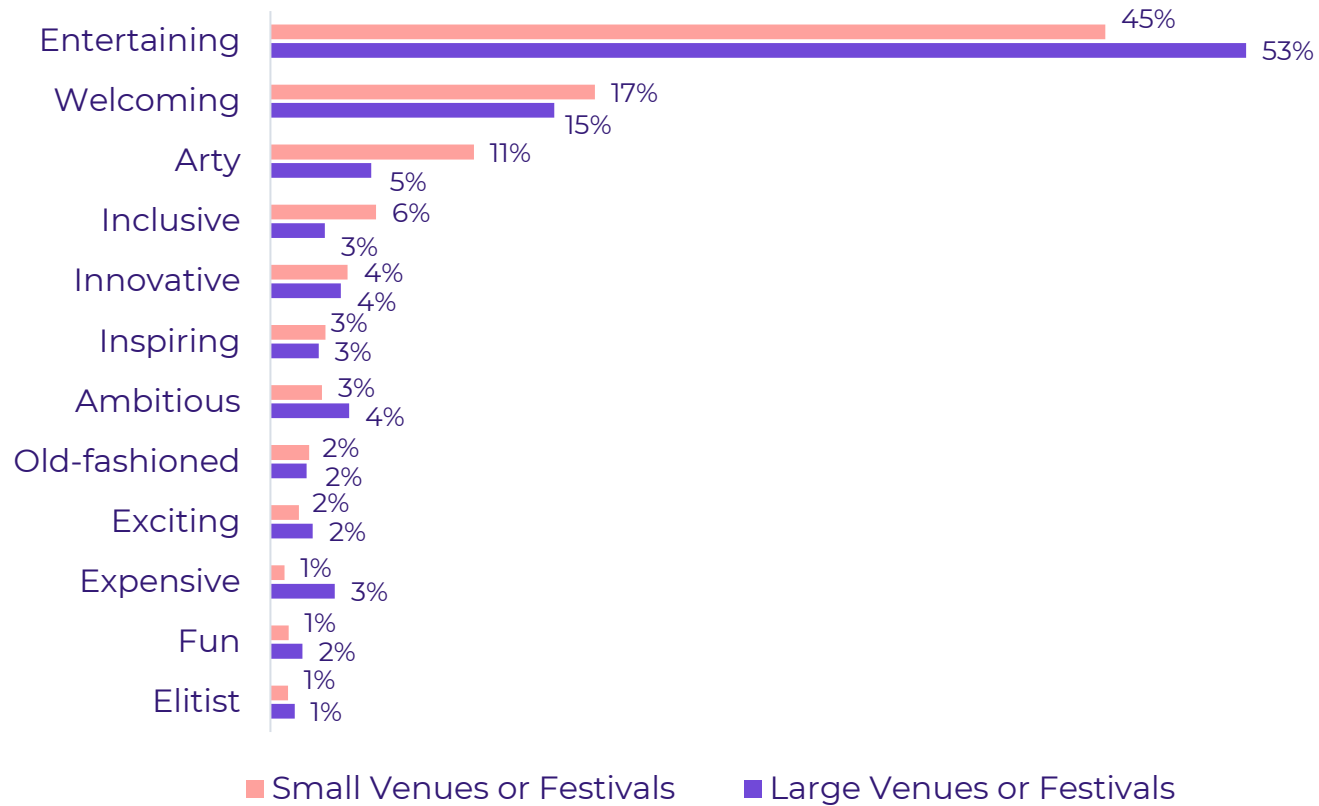
Which of the words you select do you think BEST describes it? (Select one)





Large organisations compared to small organisations

Which of the words you select do you think BEST describes it? (Select one)

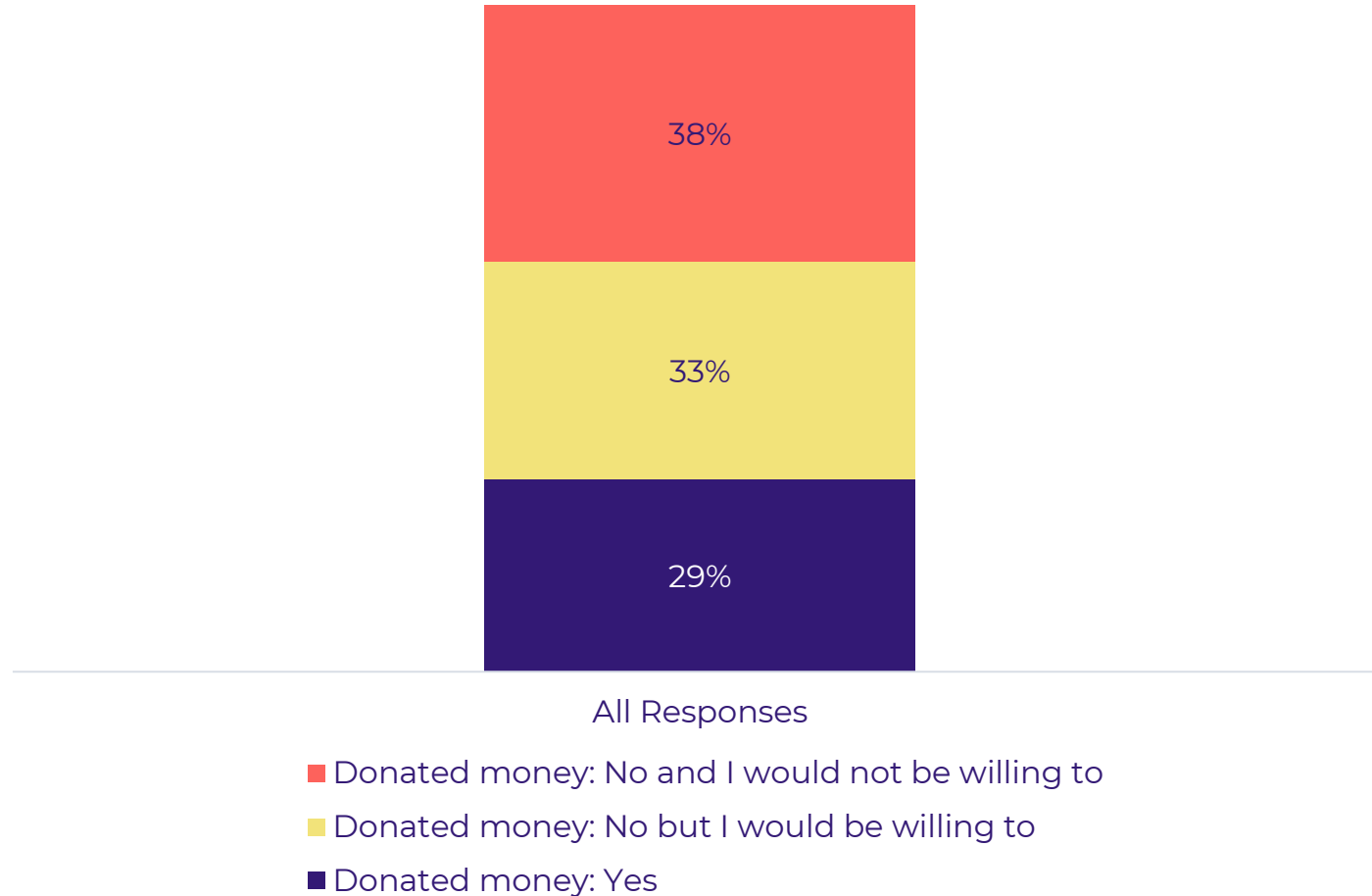




Behaviour

Support: donating money

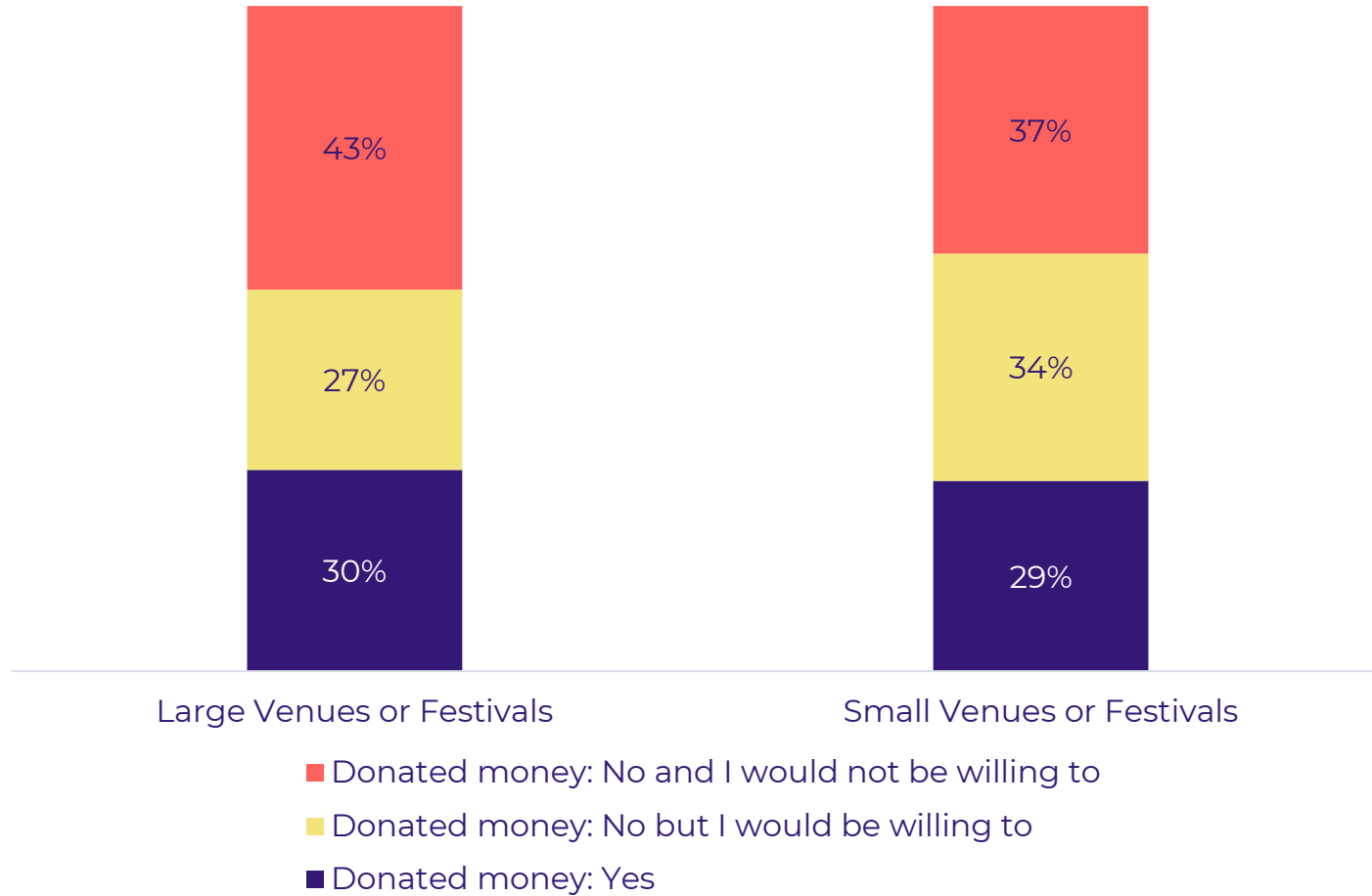
Have you personally supported the organisation in any of the following ways: donated money?





Large organisations compared to small organisations

Have you personally supported the organisation in any of the following ways?

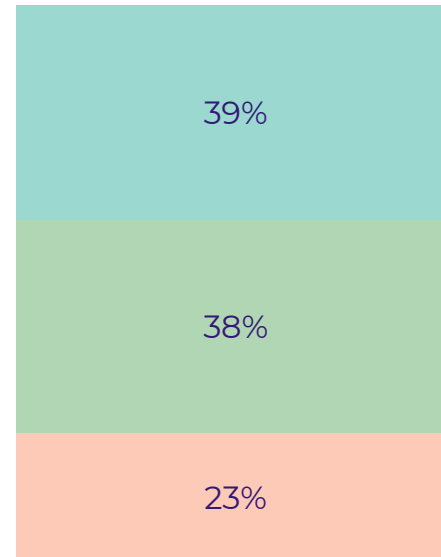




Behaviour

Support: helped out with artists or community groups at this organisation

Have you personally supported the organisation in any of the following ways: helped out with artists or community groups at this organisation?



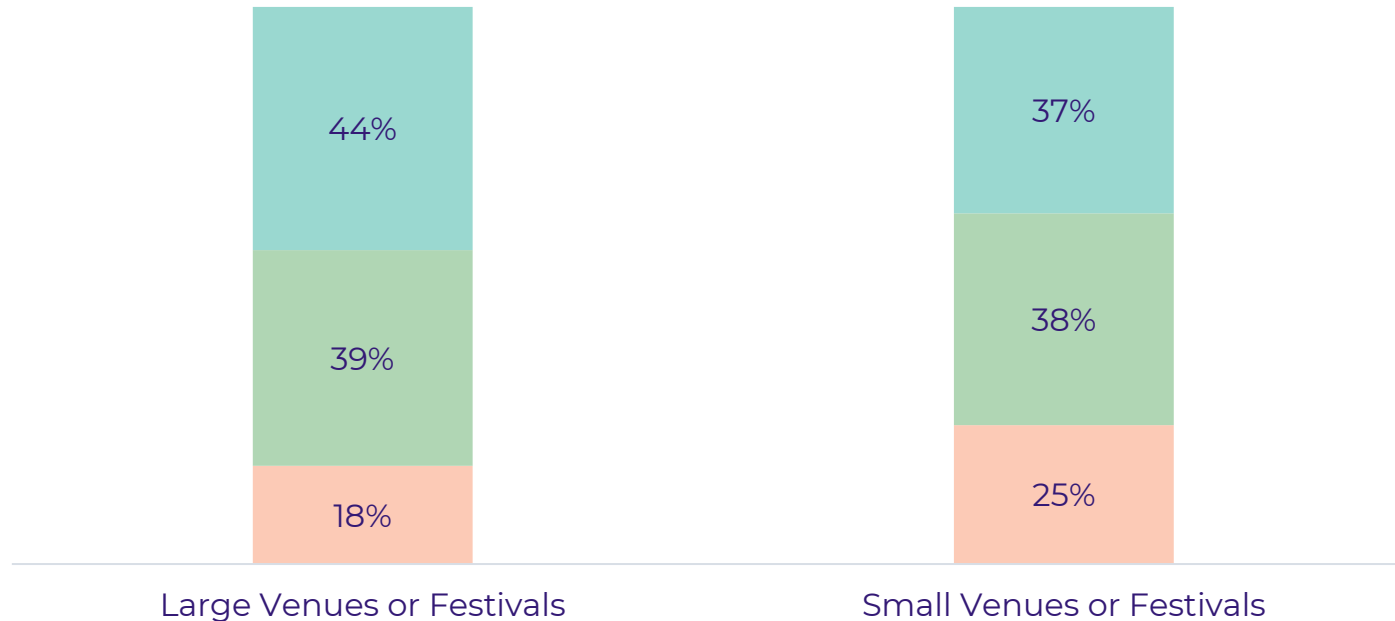
All Responses

- Helped out artists or community groups at this organisation: No and I would not be willing to
- Helped out artists or community groups at this organisation: No but I would be willing to
- Helped out artists or community groups at this organisation: Yes



Large organisations compared to small organisations

Have you personally supported the organisation in any of the following ways: helped out with artists or community groups at this organisation?



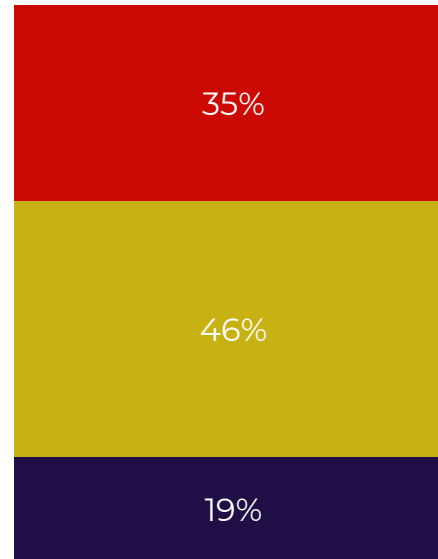
- Helped out artists or community groups at this organisation: No and I would not be willing to
- Helped out artists or community groups at this organisation: No but I would be willing to
- Helped out artists or community groups at this organisation: Yes



Behaviour

Support: joined this organisation's membership programme

Have you personally supported the organisation in any of the following ways: joined this organisation's membership programme?



All Responses

- Joined this organisation's membership programme: No and I would not be willing to
- Joined this organisation's membership programme: No but I would be willing to
- Joined this organisation's membership programme: Yes



Large organisations compared to small organisations

Have you personally supported the organisation in any of the following ways: joined this organisation's membership programme?

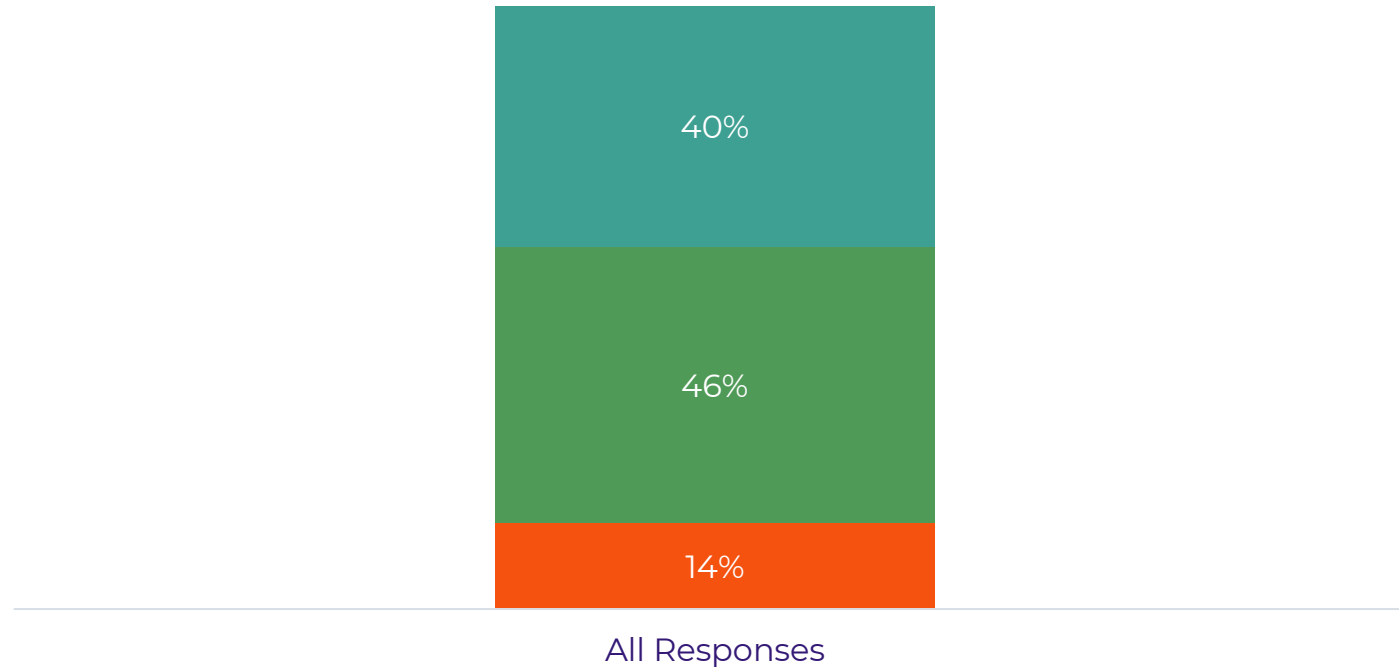


- Joined this organisation's membership programme: No and I would not be willing to
- Joined this organisation's membership programme: No but I would be willing to
- Joined this organisation's membership programme: Yes



Support: contributed to a crowdfunding effort

Have you personally supported the organisation in any of the following ways: contributed to a crowdfunding effort?

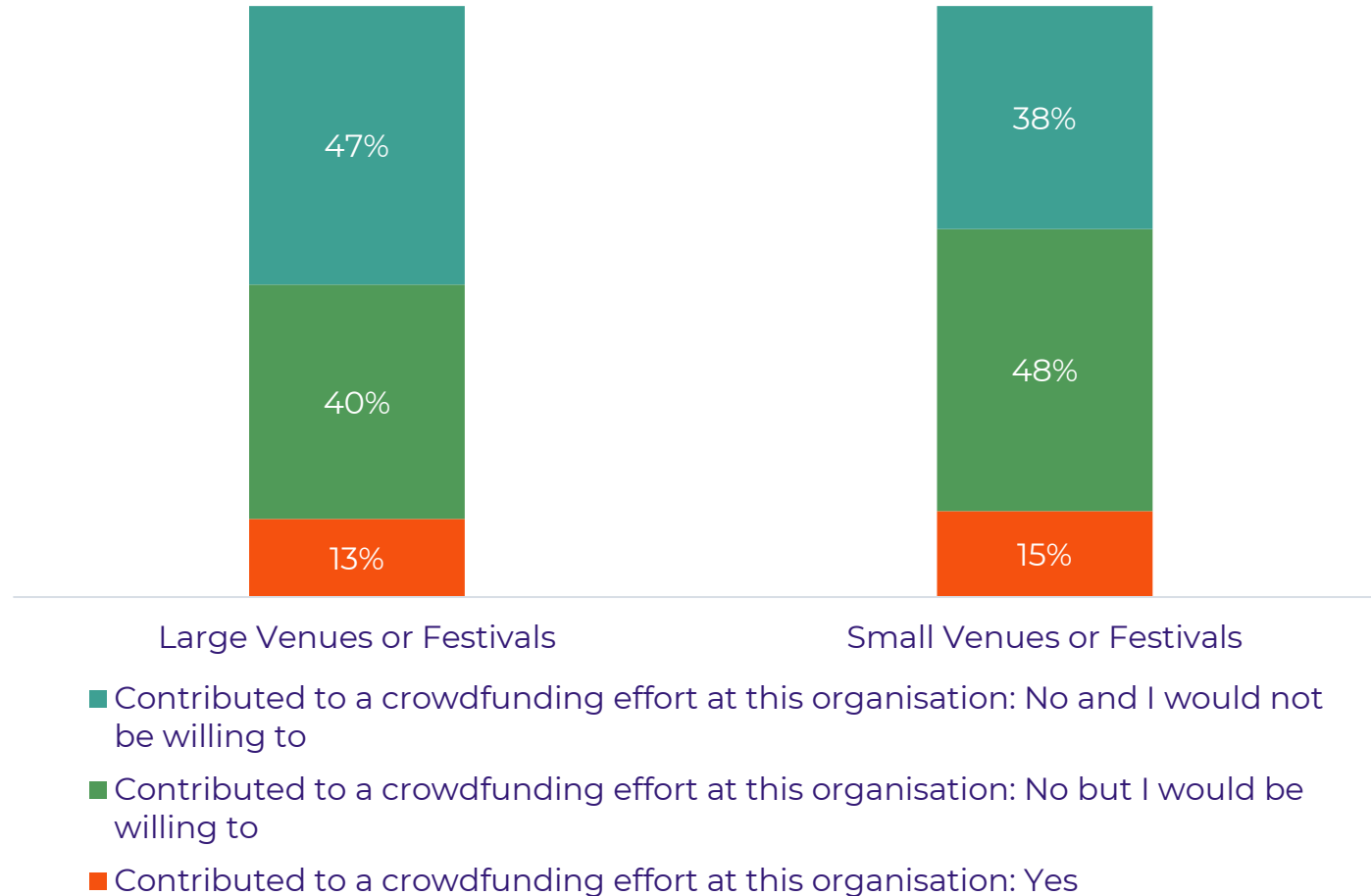


- Contributed to a crowdfunding effort at this organisation: No and I would not be willing to
- Contributed to a crowdfunding effort at this organisation: No but I would be willing to
- Contributed to a crowdfunding effort at this organisation: Yes



Large organisations compared to small organisations

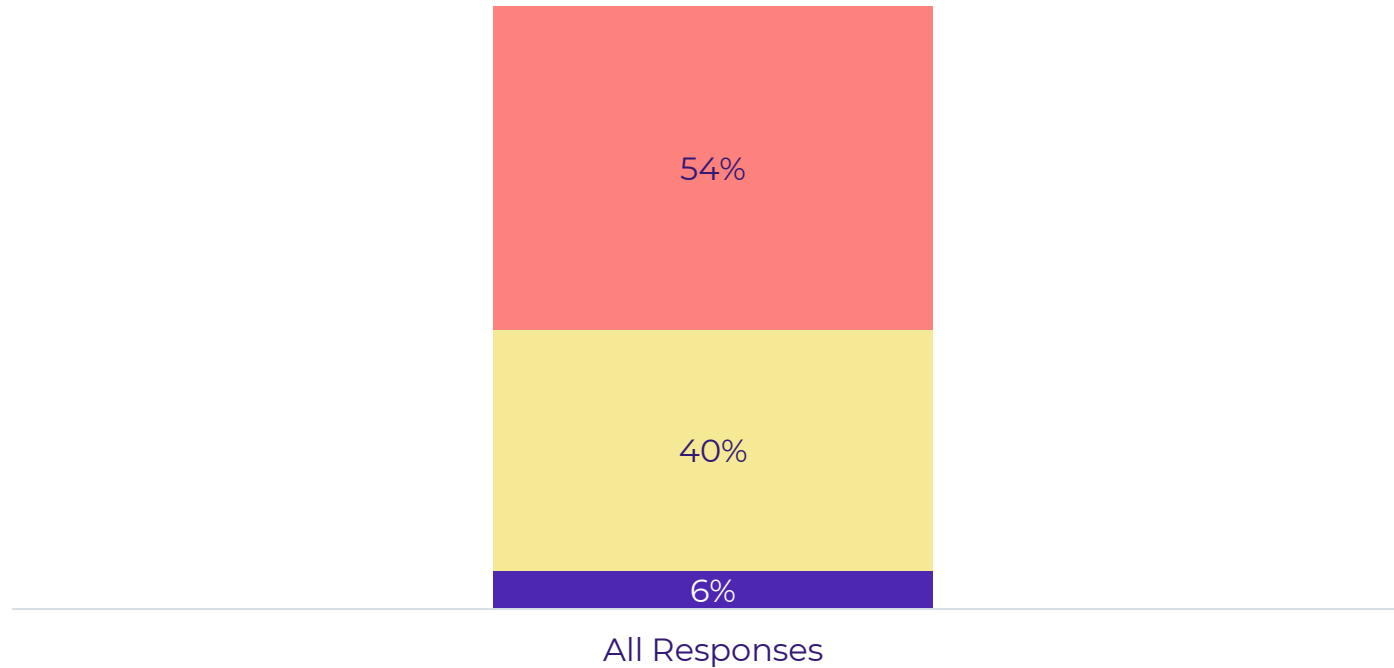
Have you personally supported the organisation in any of the following ways: contributed to a crowdfunding effort?





Support: did unpaid volunteer work

Have you personally supported the organisation in any of the following ways: unpaid volunteer work?



- Did volunteer work for this organisation unpaid: No and I would not be willing to
- Did volunteer work for this organisation unpaid: No but I would be willing to
- Did volunteer work for this organisation unpaid: Yes



Large organisations compared to small organisations

Have you personally supported the organisation in any of the following ways: unpaid volunteer work?

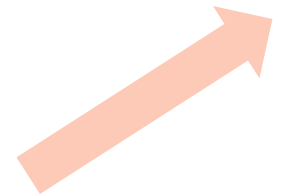
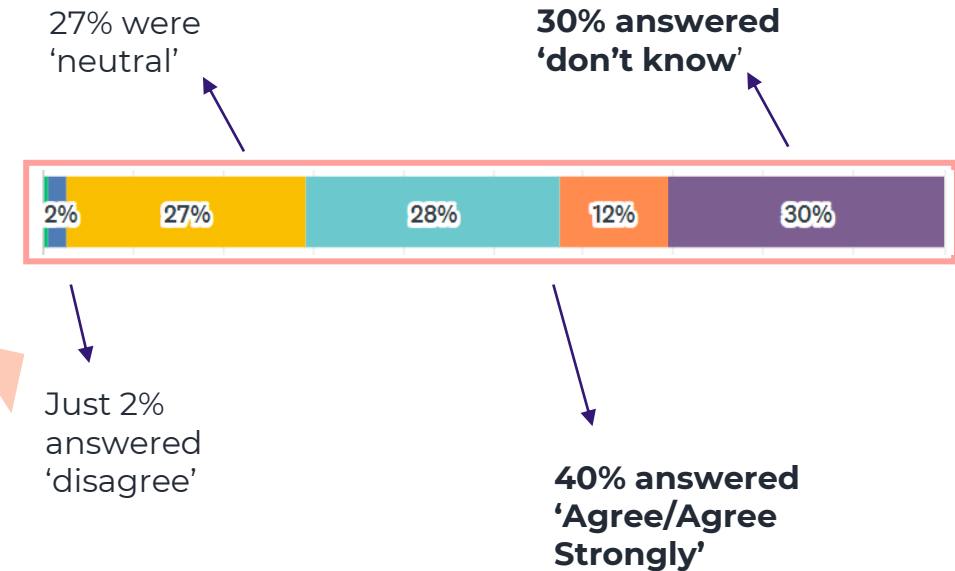




Impact

Respondents feel that the organisations they visit are important to the local community

How far do you agree with the following statements about the organisation?



Strongly disagree

All Responses

Strongly agree



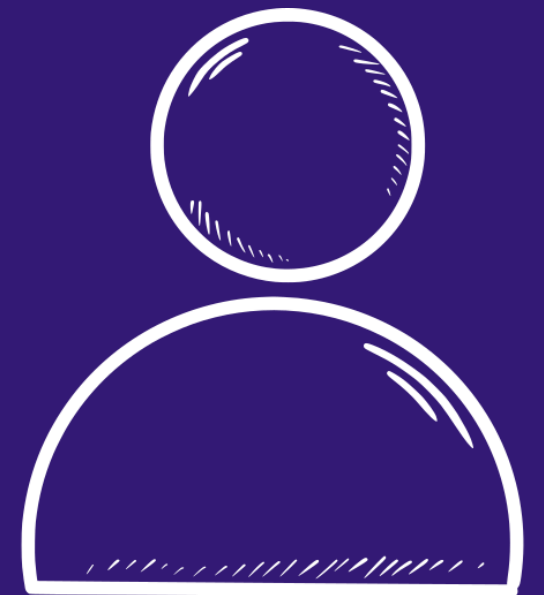
Large organisations compared to small organisations

How far do you agree with the following statements about the organisation?



Spotlight on...

Key audience segments

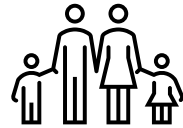


Spotlight on... Under 45s

Compared to responses from other age groups, under 45s are:

Profile

More likely to have children under 16 at home.



Behaviour

- More likely to book as a result of **recommendations**
- More likely to **try new things** and be open to being **challenged**.
- More motivated to attend cultural events for **social** reasons – wanting to have **fun** and be part of something.
- More likely to attend **live music, comedy, street arts, contemporary dance,**
- Less likely to attend plays and contemporary music.

Attitude

- More likely to say that a lack of time, **high cost** and limited choice is stopping them seeing what they want to see.
- Less likely to think the organisation is showing commitment to **environmental sustainability**

Impact

More willing to **support** organisations.



Spotlight on... Over 65s

Compared to responses from other age groups, over 65s are:

Profile

Over 65

Behaviour

- Less likely to find out about events online.
- Less likely to attend films, rock and pop, comedy and street arts.
- More **traditional** in their tastes, **sticking to what they know and like**, and less willing to take risks and try new things. They don't want to miss events that are 'important' to see.
- Much less socially motivated – it is all about the **particular event or performance**.

Attitude

- More likely to think organisations are committed to environmental sustainability
- More likely to say that travel and health issues hold them back from attending more.



Impact

Less willing to support organisations financially or by volunteering.



Spotlight on... people with children under 16

Compared to responses from other age groups, people with children under 16 are:

Profile

Families

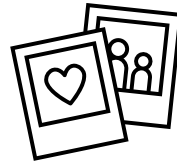
Behaviour



- More likely to find out about events online.
- Less frequent attenders – mainly due to **lack of time**.
- More likely to attend **musicals, rock and pop, comedy and street arts**.

Attitude

- Driven to attend less by the ‘importance’ of particular events and more by **social** reasons – **spending time with friends or family**, accompanying their children or seeing a relative or friends involved in the event.
- More open to joining membership schemes **and less willing to pay more for the best seats**.



Impact

Looking for social experiences and family memories

Spotlight on... Low frequency attenders

Compared to responses from other age groups, low frequency attenders are:

Profile

More likely to describe their ethnic origin as Irish.

Behaviour

- More likely to say they **don't have anyone to attend with** as a reason for not attending more
- Less likely to find out about events directly from venues.
- Prefer sticking to things they know and like and more likely to be looking for 'good entertainment'.

Attitude

- Less likely to feel the organisation reflects their cultural heritage
- More motivated by 'big names' and attending for social occasions.
- Less willing to pay for the best seats.



Impact

Less likely to have supported an organisation or be willing to support.

Spotlight on... disabled audiences

Compared to responses from other age groups, people who identify as D/deaf or D/disables or have a long-term health condition are are:

Profile

People who identify as having a disability or long-term health condition

Behaviour

- More likely to say they have **eclectic** tastes – but also more likely to say they have traditional tastes.
- Less likely to attend rock and pop or comedy.
- More likely to attend cultural events for a boost to their **wellbeing** and to **feel part of a community**.
- More likely to be held back from attending more by their **health**, the **cost of attending** and **getting to events**, as well as **not having anyone to go with**.

Attitude

- Less likely to say that the organisations are open to those with access needs.
- **More positive about organisations** – more likely to describe them as welcoming, inclusive, innovative and fun.

Impact

Less likely to have donated money
Less willing to pay for the best seats.

indigo

August 2023

In association with



With thanks to Heather
Maitland