

IMPACT SURVEY

Interim report

thrive
making culture count



Arts attendance in
Northern Ireland 2023-24

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IMPACT

IMPACT MEASUREMENT OF PEOPLE ATTENDING CULTURE TODAY

How does going to an art gallery make us feel, versus attending a concert or seeing a dance performance?

How does age or how often we go to cultural events affect our behaviour?

Does who we go with matter?

Thrive has spent twenty years doing research with and for hundreds of arts organisations, both large and small, to better tell the story of cultural engagement in Northern Ireland. Whether it's at a sector level or for the benefit of individual organisations, we have created surveys, facilitated focus groups and interviews, carried out evaluations and ticketing analysis. Research of Northern Ireland audiences is part of our DNA.

Over the years, we've encountered and delivered a large amount of research on the impact of cultural participation (including alleviating loneliness, promoting positive aging and inclusion), however, very little research had been done on the impact of arts attendance.

This is why we created our IMPACT survey, a post-visit audience survey to evidence the impact of attendance at arts organisations and spaces across Northern Ireland. It is the first of its kind in Northern Ireland. Such data from and about NI audiences did not exist before this survey.

In this interim report, you will find out about:

- The impact of arts attendance on NI audiences
- How different demographics engage with arts and culture
- Their behaviours and motivations
- How the cost of living has affected their spend around arts attendance

The final report will be published in May 2024.

Summary

Who are the audiences who took the impact survey?

Audiences of all ages responded to IMPACT, ages 50 to 69 were the most prevalent. The majority of people were returning audiences and half of audiences came from within a 30 minute journey. Most didn't have any children at home, and only 12% came with their children, despite the survey running over Panto/ Christmas season.

36% of attenders earn less or significantly less than median earnings for full-time employees in Northern Ireland. Those who reported earning significantly lower were more likely to be younger in age, female, disabled, and LGBTQI+ .

What did people go to see, and how did they behave when they did?

Most responders to the IMPACT survey came from those going to a gig/concert, a theatrical performance, or comedy. Respondents said they visited multiple times annually, with 70% saying they attended four or more times a year.

Most came with a spouse/partner, friends/colleagues, or extended family members, with just 10% attending by themselves. 84% of audiences spend additional money on food or drinks- 60% in the venue and 41% somewhere local - it all adds up to economic impact.

Why do people attend?

Respondents' biggest motivations for attending were to be entertained, see a specific artist, or spend time with friends/family. But when people were prompted to choose a main reason for their visit, other reasons came to the fore – to support the venue/space, be inspired/uplifted, or experience something new.

Audiences are also decisive. 3/4 of audiences decided to go as soon as they heard about the event. They also look forward to their visit, with two-thirds of audiences saying they were somewhat excited and 35% were so excited they were buzzing.

How are people impacted by attending arts events?

Happy is by far and away is the biggest feeling people get after attending something arts/culture related. Most (89%) don't have any negative emotions after attending something arts/culture. 9-in-10 respondents plan on returning to the venue, or want to support arts/culture venues more.

How has the cost of living affected people's spend around arts attendance?

More than half of audiences say the cost of living crisis has an impact on their arts/culture experiences. 38% say they are spending less on other things as part of their arts/culture experience, with 29% going less often and 26% spending less on the experiences themselves.

However, 32% say cost of living doesn't actually have an impact on their arts/culture experiences. Older age groups are reporting being less affected by the cost of living compared to younger age groups.

How do different demographics engage with arts events?

Younger audiences are more likely to go to music, dance, talks, visual arts and circus (this differs slightly by age bracket though). Older audience members are more likely to go to music, theatre, and visual arts. Music concerts or gigs attracted people on both ends of the age spectrum. Visual arts saw an even spread of ages but was the most attractive art form to young age groups 20-34.

Younger attendees were more likely to go for a variety of reasons (experience something new, get out of the house, feel like part of a community, celebrate a special occasion). Older age groups were more driven by supporting the venue, being inspired/uplifted, learning something, celebrating, or being challenged.

Disabled audiences tend to live closer to the venues they attend. They usually attend with extended family and are less likely to book as soon as they heard (12%). They rate their overall experience as slightly less satisfactory than non-disabled audiences.

Audiences for regional venues were more likely to be new to the venue, and be late decision-makers, with 28% who said they decided to visit at the last minute or fairly recently. They are also hyper-local, with more than half of them traveling less than half an hour. In comparison, only 15% of audiences for Belfast venues travelled less than 15 minutes.

Methodology

- Consultation events were carried out to co-create a survey that is both useful and relevant to the sector.
- The survey was hosted on thrive's SurveyMonkey and participating organisations collected data through their own online survey link via their mailing list and on social media. Some organisations used paper surveys and others printed QR codes on flyers and posters.
- Each organisation was provided with their own live reporting link so they could view their data in real time.

35 arts organisations across Northern Ireland have been taking part in the IMPACT survey. Over 2,000 survey responses have been collected from September 2023 to January 2024.

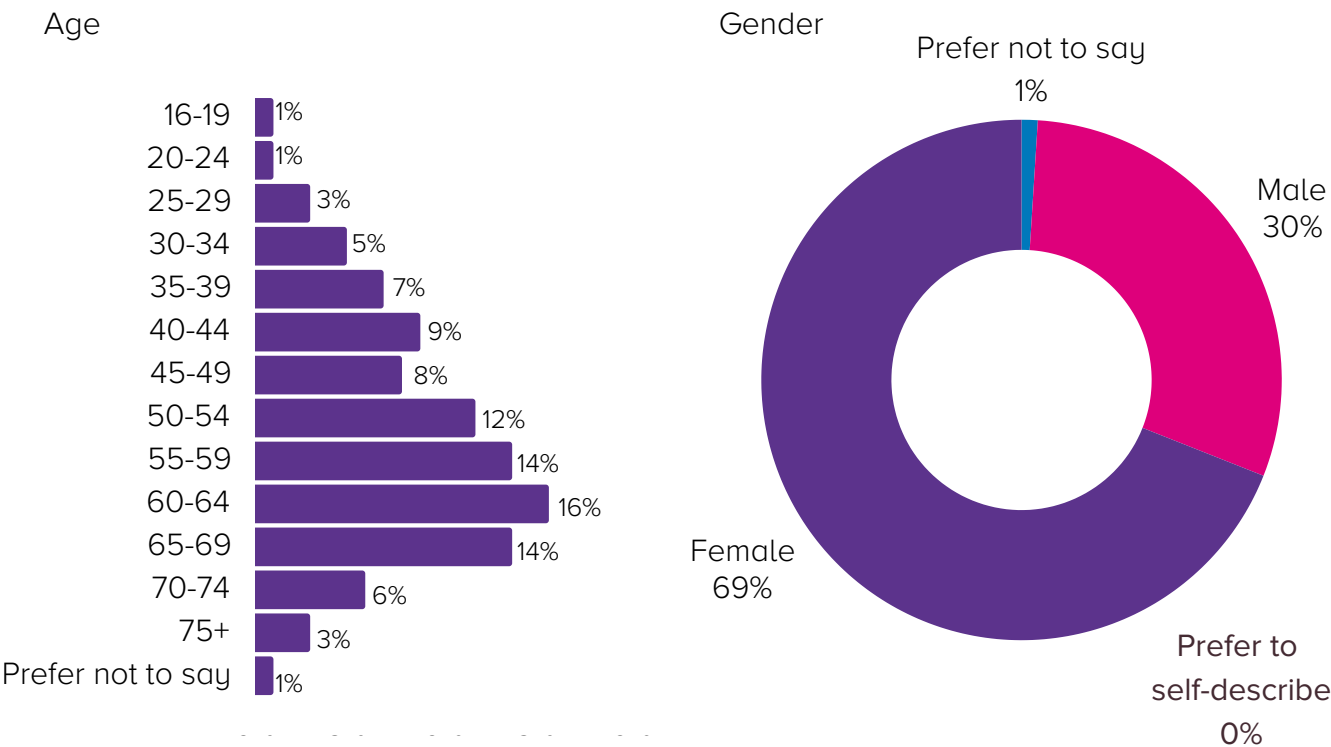
Participating organisations include:

Ardhoven Theatre, Ards Arts Centre, Belfast International Arts Festival, The Black Box, The Braid, Catalyst Arts, CCA, Circusful, Craft NI, CQAF, Cultúrlann McAdam Ó Fiaich, Down Arts Centre, The Duncairn, FE McWilliam Gallery, Flowerfield Arts Centre, High Points Youth Ballet, Imagine! Belfast, ISLAND Arts Centre, The Lyric Theatre, Market Place Armagh, Millennium Forum, Naughton Gallery, NI Science Festival, Oh Yeah Music Centre, The Playhouse, The Portico of Ards, The Portico of Ards, The Roe Valley Arts & Cultural Centre, Seamus Heaney HomePlace, SSE Arena, Strand Arts Centre, Strule Arts Centre, The MAC, Waterfront and Young at Art

RESPONDENTS PROFILE

WHO ARE THE NI AUDIENCES WHO TOOK THE IMPACT SURVEY?

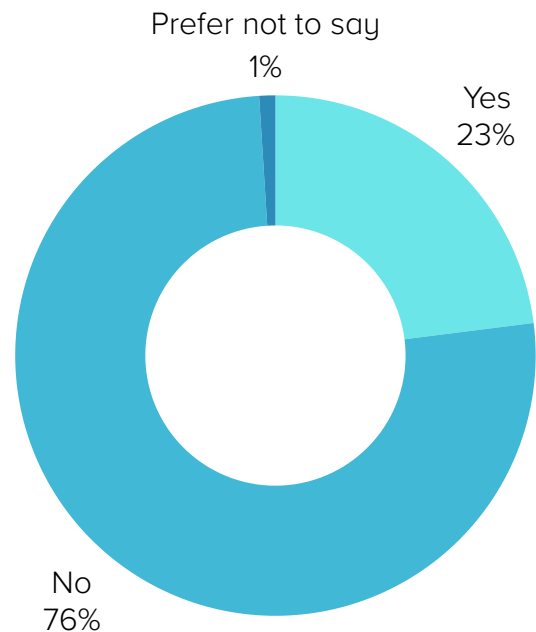
We had responses coming from all age groups, but age groups 50 to 69 were the most prevalent. A majority of women responded to the survey. We know from previous research that this is quite common - older age groups and women are more likely to take surveys.



RESPONDENTS PROFILE

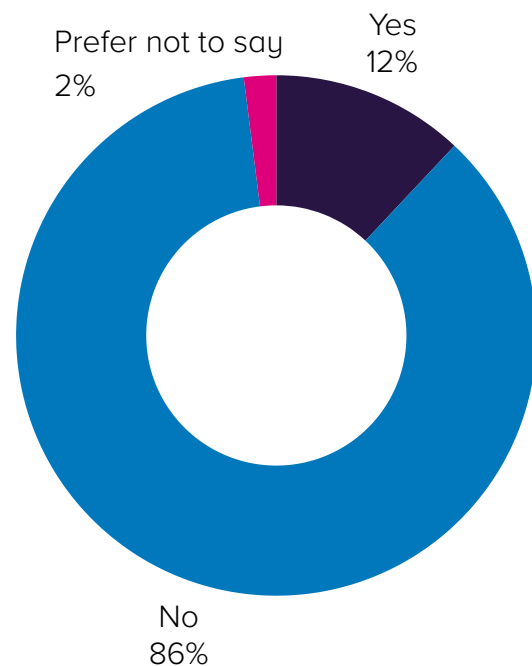
23% of respondents had children under 16 living in their household. We identified them as 'family audiences'.

Do you have children under 16 living with you?



12% of respondents identified as D/deaf, disabled or have a long-term health condition. This does not match most recent census data for Northern Ireland in 2021, which records one person in four (24.3%) had a limiting long-term health problem or disability.

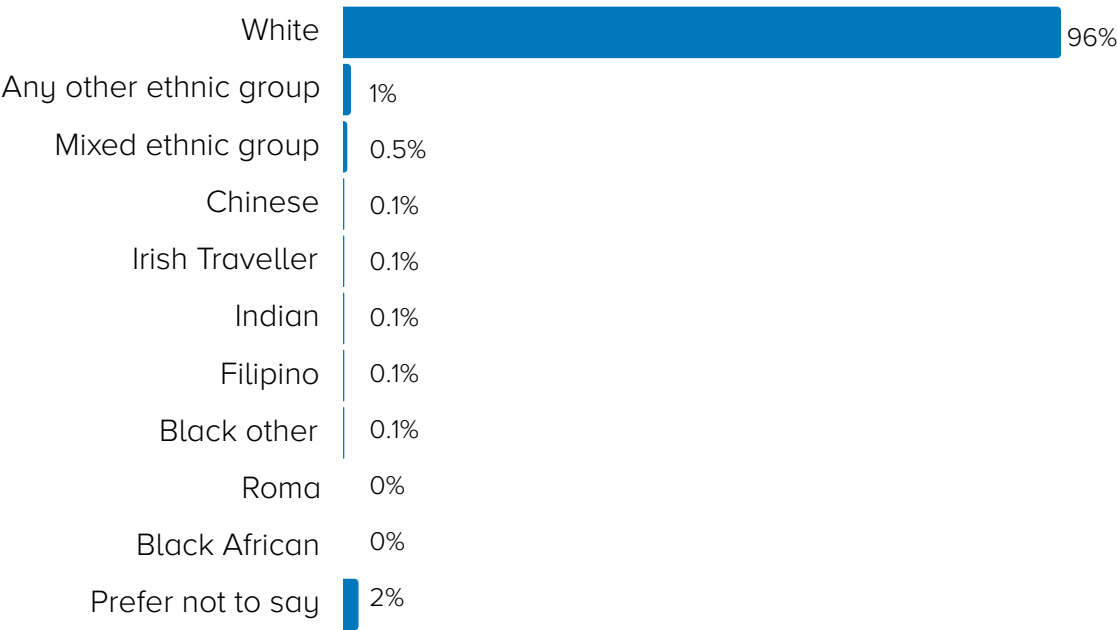
Do you identify as a D/deaf or disabled person, or have a long-term health condition?



RESPONDENTS PROFILE

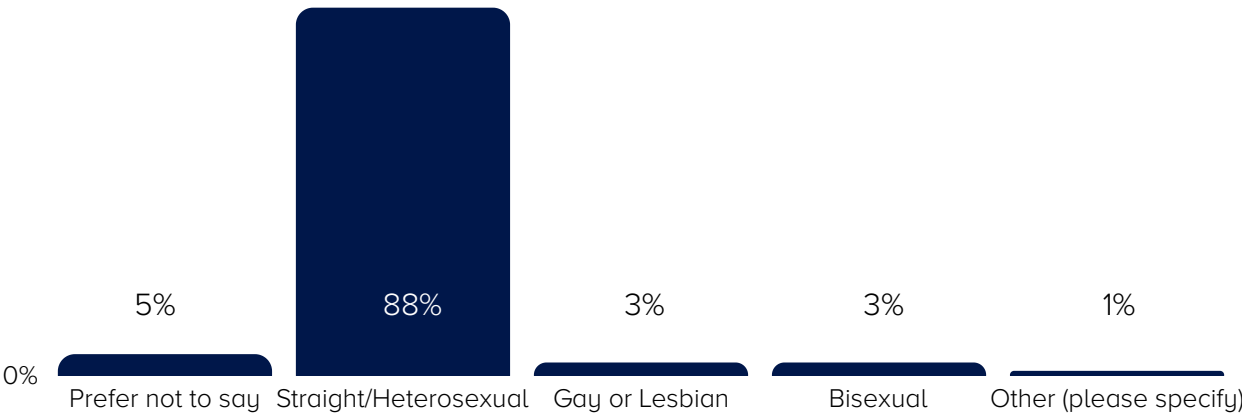
Ethnic grouping broadly matches most recent census data for Northern Ireland in 2021, which lists 96.5% of respondents as white. The IMPACT survey lists 96% of respondents as white.

What is your ethnic group?



A higher percentage of IMPACT audiences were LGBTQI+ when compared to the most recent census data for Northern Ireland in 2021, which lists 90% of respondents as straight or heterosexual.

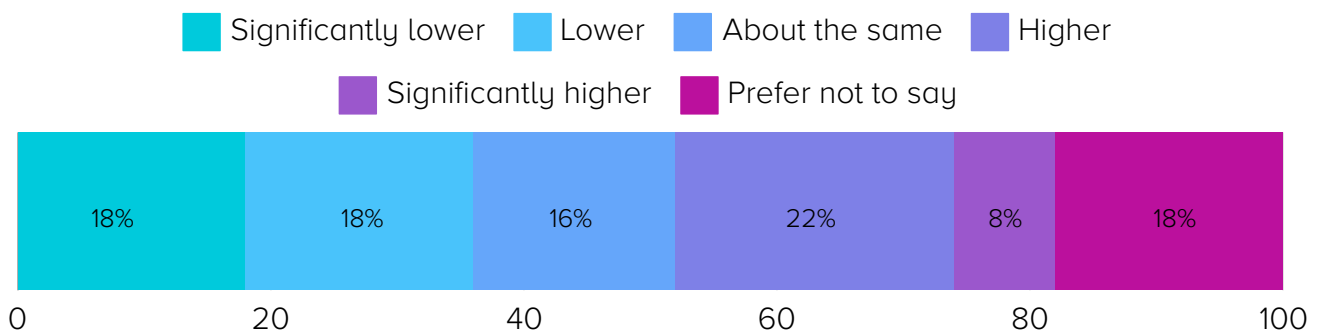
Which of the following best describes your sexual orientation?



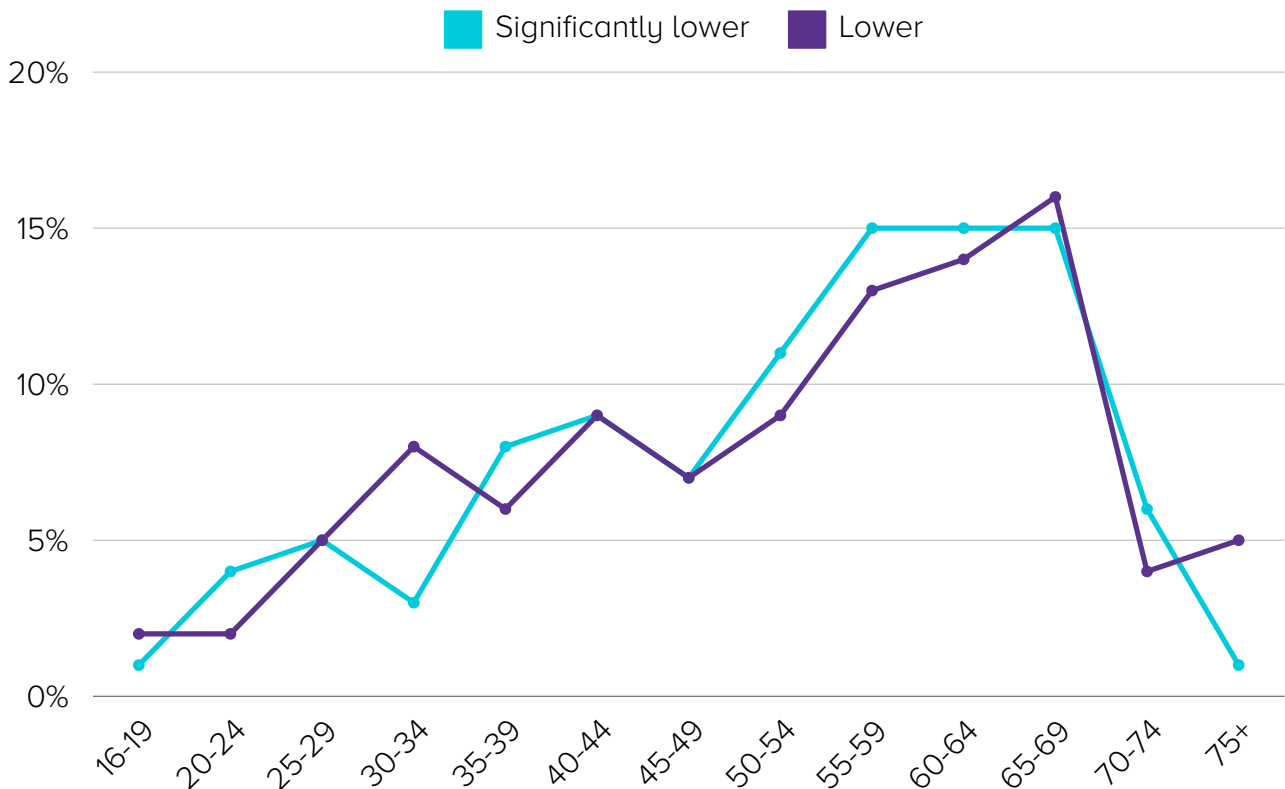
RESPONDENTS PROFILE

36% of respondents earn less or significantly less than median earnings for full-time employees in Northern Ireland. 26% earn more or significantly more.

In 2022, the median earnings for full-time employees in Northern Ireland was £30,000.
How do your earnings compare?*



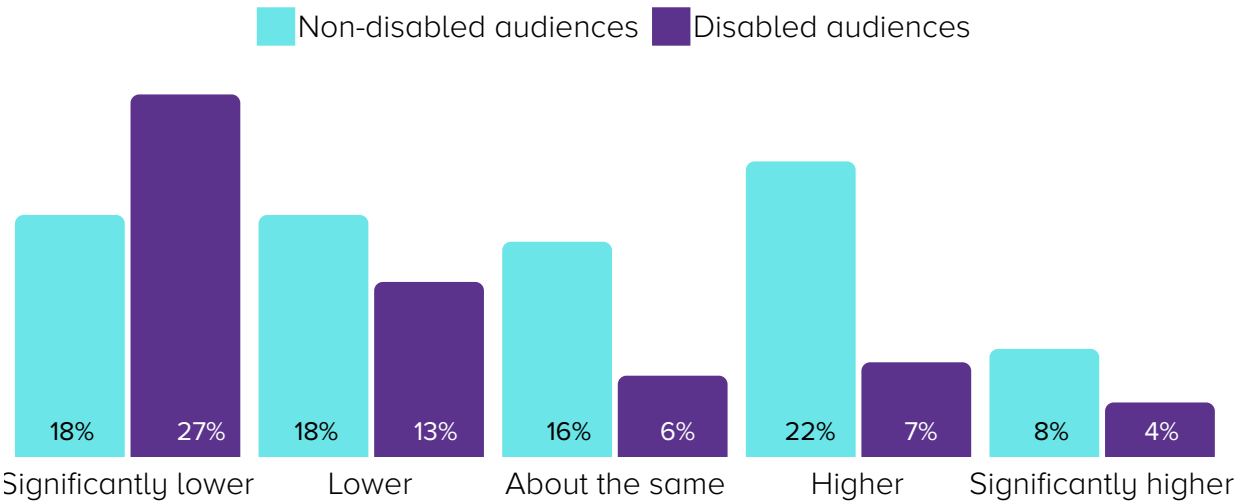
Those who reported earning significantly lower were more likely to be younger in age.



*www.nisra.gov.uk/news/employee-earnings-northern-ireland-2022

RESPONDENTS PROFILE

Those who reported earning significantly lower were more likely to be female, be disabled, and be LGBTQI+ .



	NI Total	Significantly lower	Lower	Same	Higher	Significantly higher
Male	30%	18%	26%	34%	35%	51%
Female	69%	81%	73%	65%	64%	49%
Prefer to self-describe:	0%	0%	1%	0%	0%	0%
Prefer not to say	1%	1%	0%	0%	0%	0%

	NI Total	Significantly lower	Lower	Same	Higher	Significantly higher
Straight/ Heterosexual	88%	86%	88%	93%	90%	97%
Gay or Lesbian	3%	4%	3%	3%	4%	1%
Bisexual	3%	6%	4%	2%	2%	1%
Prefer not to say	5%	2%	5%	3%	4%	1%
Other	1%	2%	0%	0%	1%	1%

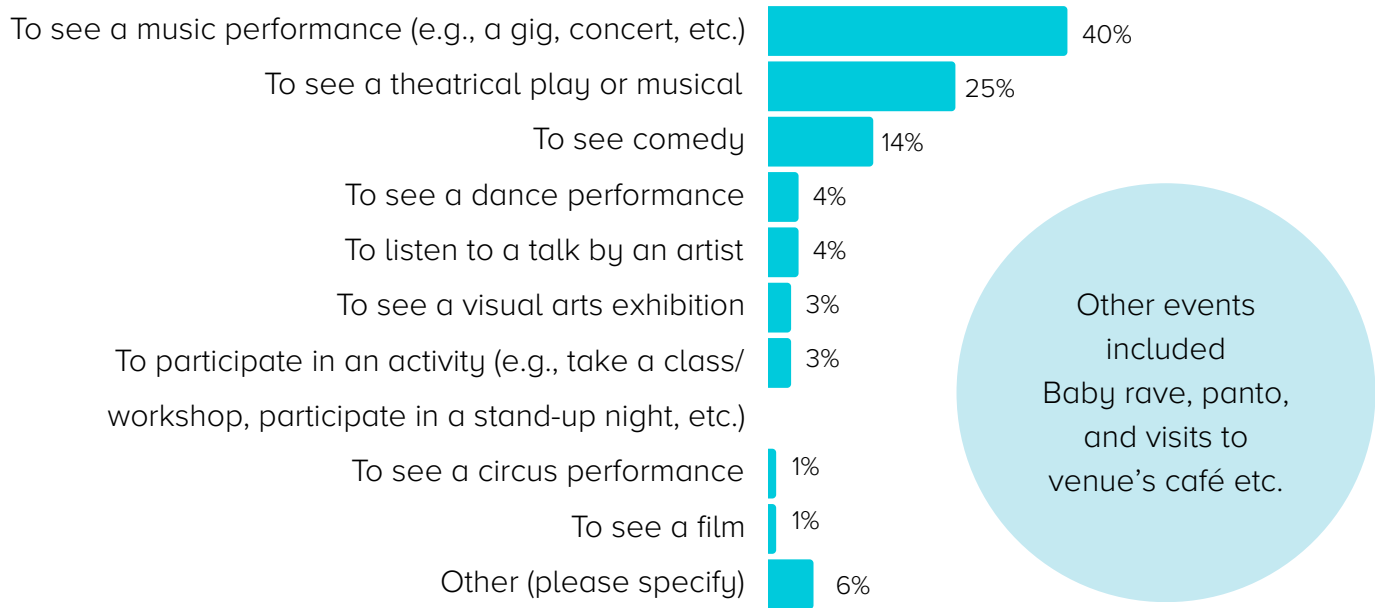
Lower  Higher

ATTENDANCE BEHAVIOUR

WHAT DID PEOPLE GO TO SEE, AND HOW DID THEY BEHAVE WHEN THEY DID?

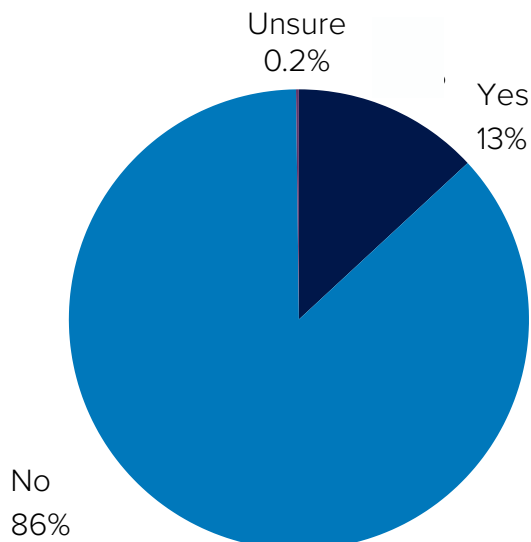
Most respondents went to a gig/concert, a theatrical performance, or comedy.

What was the nature of your most recent visit? If you visited for more than one thing, please select your main reason for visiting.



The majority of people, 86%, were returning audiences who had been to the building or space before.

Is this your first time visiting this building/space?

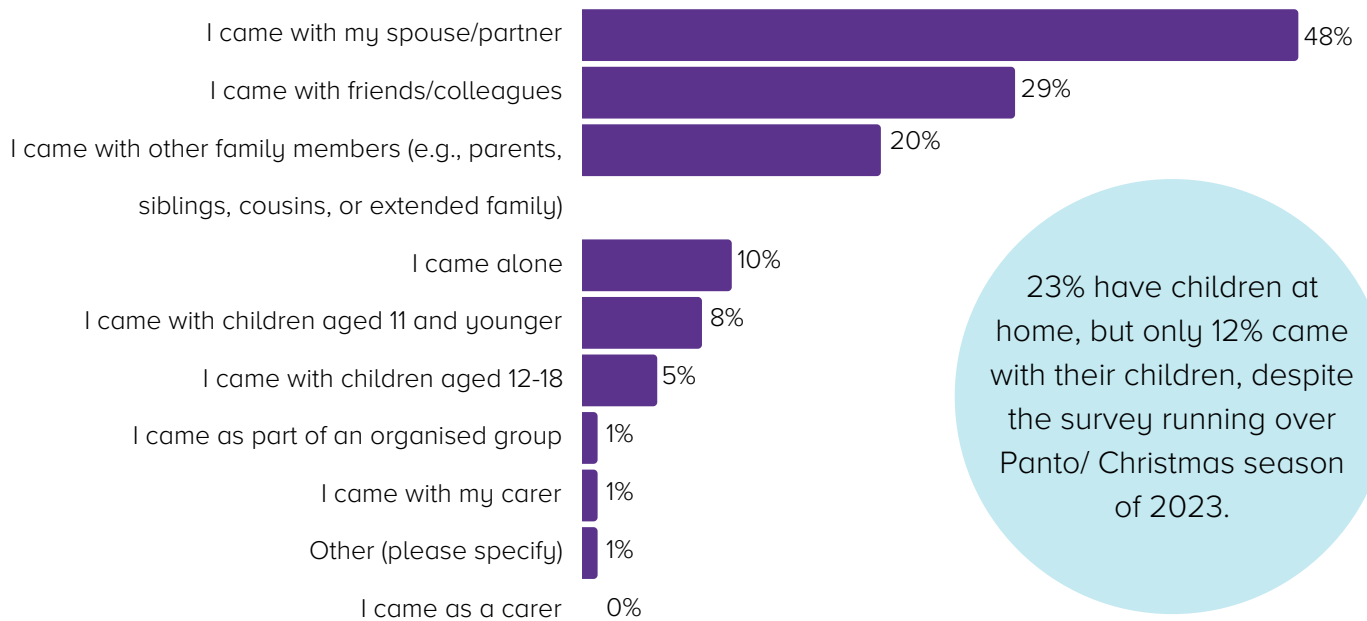


Only a small number of visitors were new to the space

ATTENDANCE BEHAVIOUR

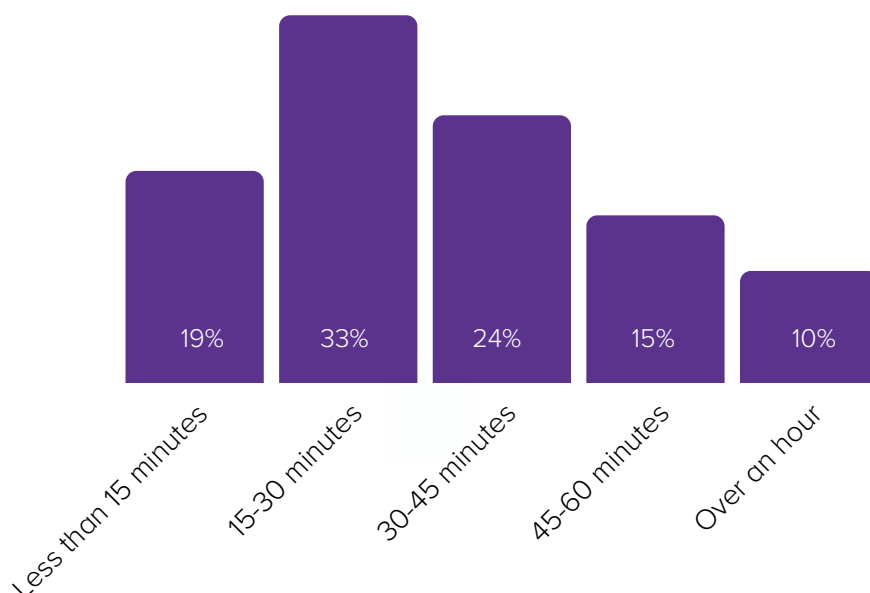
Attending arts/culture experiences tends to be a social activity, with just 10% coming alone. Of those who attended with others, most came with a spouse/partner, friends/colleagues, or extended family members.

Who did you come with during your visit? Please select all that apply.



They lived close to the venue or festival they attended, more than half of them (52%) came from within a 30 minute journey.

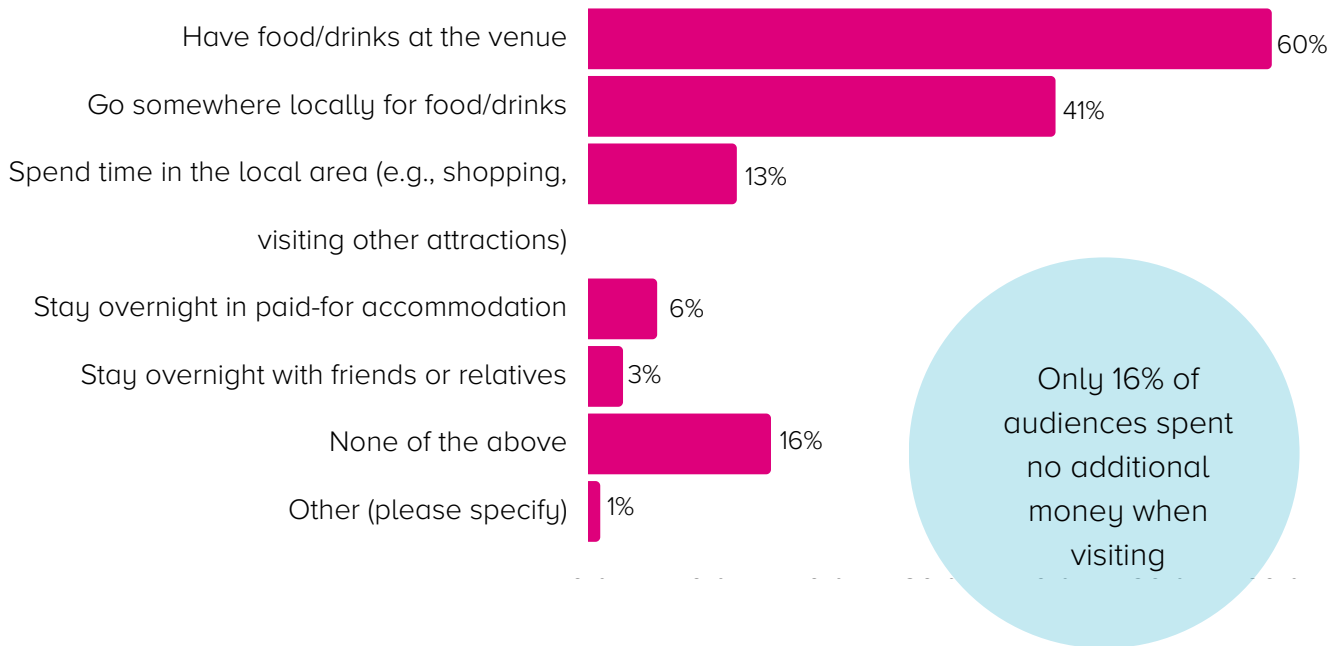
Approximately how long did your journey take?



ATTENDANCE BEHAVIOUR

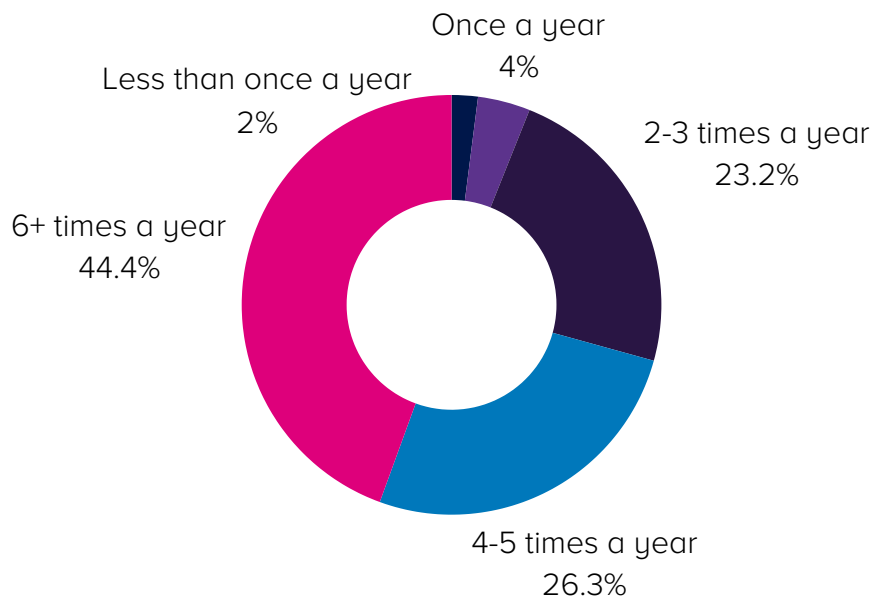
84% of audiences spend additional money on food or drinks, 60% in the venue and 41% went somewhere local.

Did you do any of the following as part of your visit? Please select all that apply.



Respondents said they visited multiple times annually, with 70% saying they attended four or more times a year.

How often do you attend or participate in arts and culture experiences?

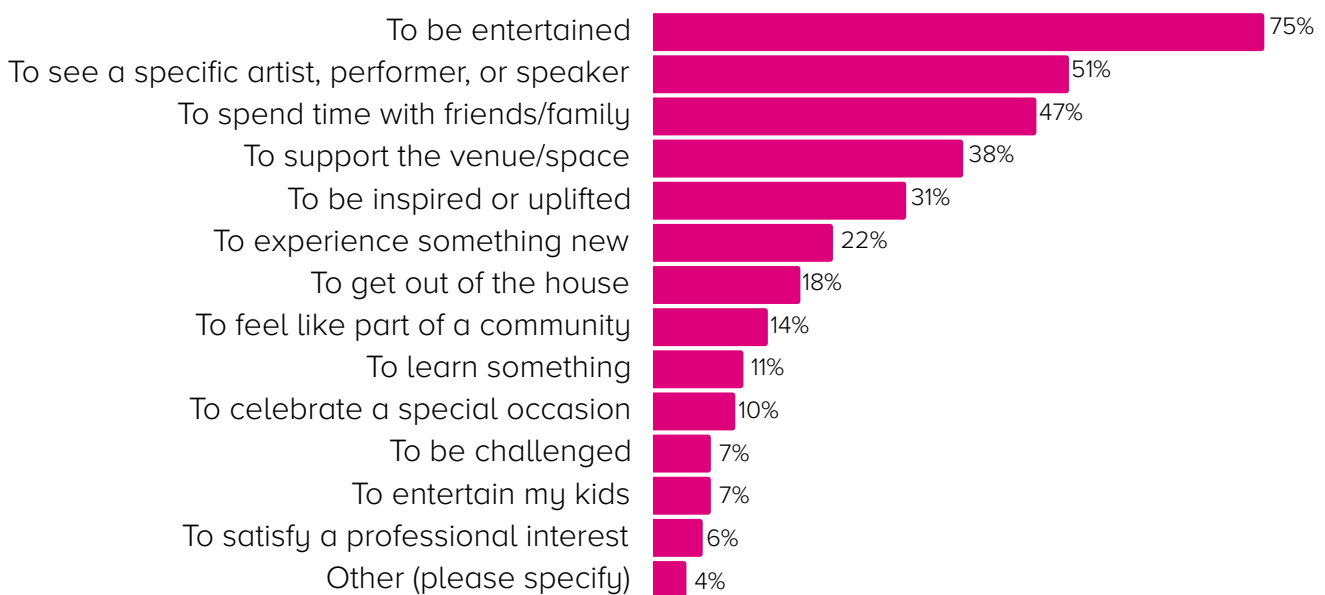


ATTENDANCE MOTIVATIONS

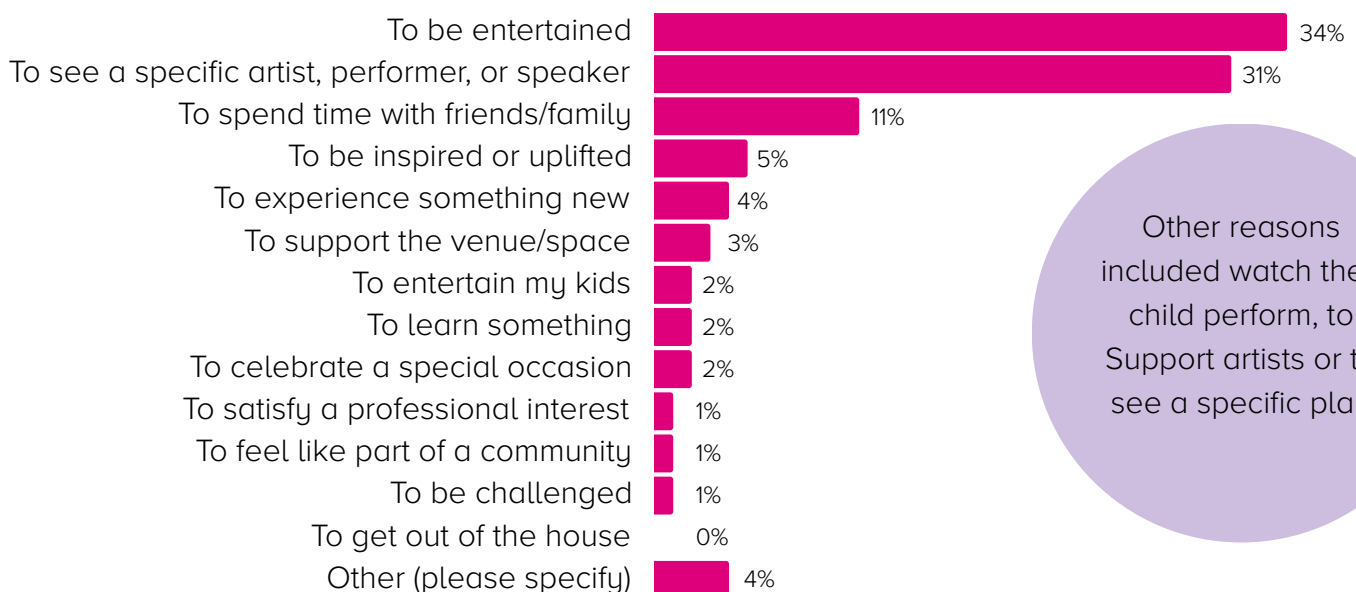
WHY DO PEOPLE ATTEND?

Respondents' biggest motivations for attending were to be entertained, see a specific artist, or spend time with friends/family. But when people were prompted to choose a main reason for their visit, other reasons came to the fore – to support the venue/space, be inspired/uplifted, or experience something new.

Are any of the following reasons why you made your visit? Please select all that apply.



Which of the following is the main reason for your visit? Please select one.



Other reasons included watch their child perform, to Support artists or to see a specific play

ATTENDANCE MOTIVATIONS

Respondents had different motivations for different art forms:

People who went to the theatre wanted to be challenged and to support the space.

People who went to music and comedy events wanted to see a specific artist.

People who went to see visual art wanted to learn something, be challenged or experience something new.

Visual art saw the widest range of reasons for attending, comedy saw the least. The same happened when respondents were asked to pick just one main reason for their visit.

Are any of the following reasons why you made your visit? Please select all that apply.

	NI Total	Music	Theatre	Comedy	Visual Art	Dance
To be entertained	75%					
To see a specific artist, performer, or speaker	51%					
To spend time with friends/family	47%					
To support the venue/space	38%					
To be inspired or uplifted	31%					
To experience something new	22%					
To get out of the house	18%					
To feel like part of a community	14%					
To learn something	11%					
To celebrate a special occasion	10%					
To be challenged	7%					
To entertain my kids	7%					
To satisfy a professional interest	6%					
Other (please specify)	4%					

Lower  Higher

ATTENDANCE MOTIVATIONS

Which of the following is the main reason for your visit? Please select one.

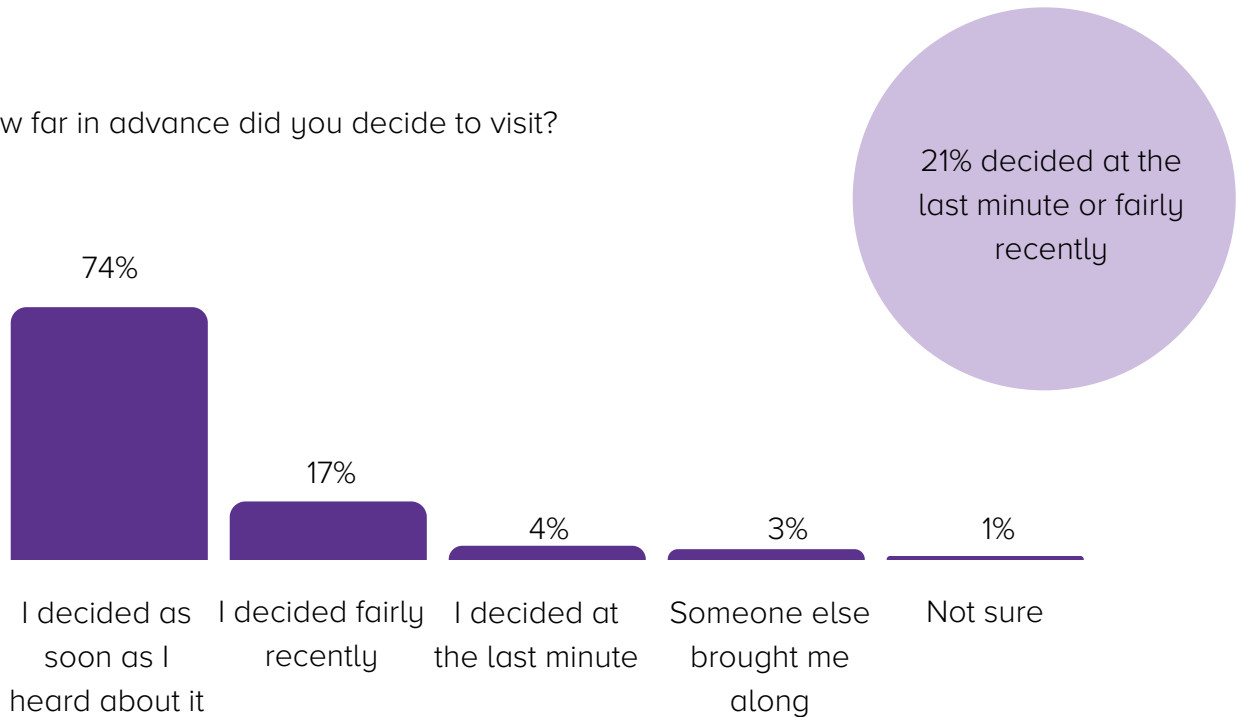
	NI Total	Music	Theatre	Comedy	Visual Art	Dance
To be entertained	34%					
To see a specific artist, performer, or speaker	31%					
To spend time with friends/family	11%					
To be inspired or uplifted	5%					
To experience something new	4%					
To support the venue/space	3%					
To entertain my kids	2%					
To learn something	2%					
To celebrate a special occasion	2%					
To satisfy a professional interest	1%					
To feel like part of a community	1%					
To be challenged	1%					
To get out of the house	0%					
Other	3%					

Lower  Higher

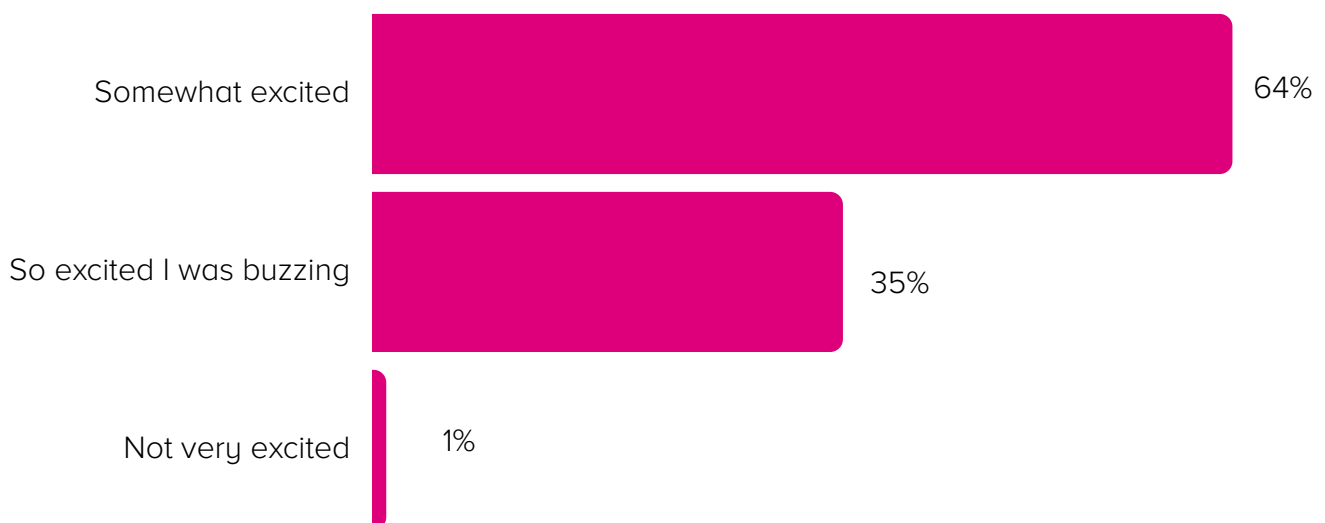
ATTENDANCE MOTIVATIONS

Audiences are decisive. 3/4 of audiences decided to go as soon as they heard about the event. They also look forward to their visit, with two-thirds of audiences saying they were somewhat excited and 35% were so excited they were buzzing.

How far in advance did you decide to visit?

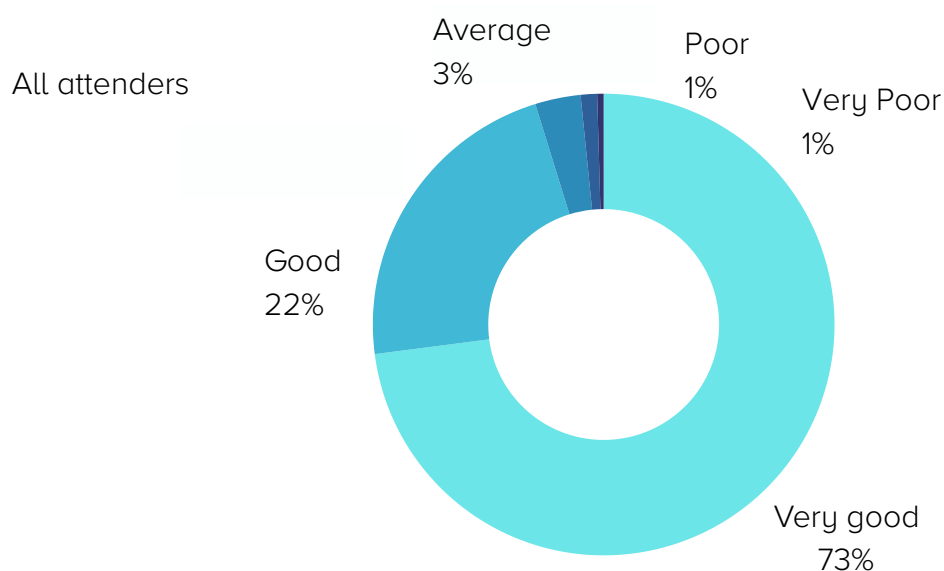


How excited were you about coming?

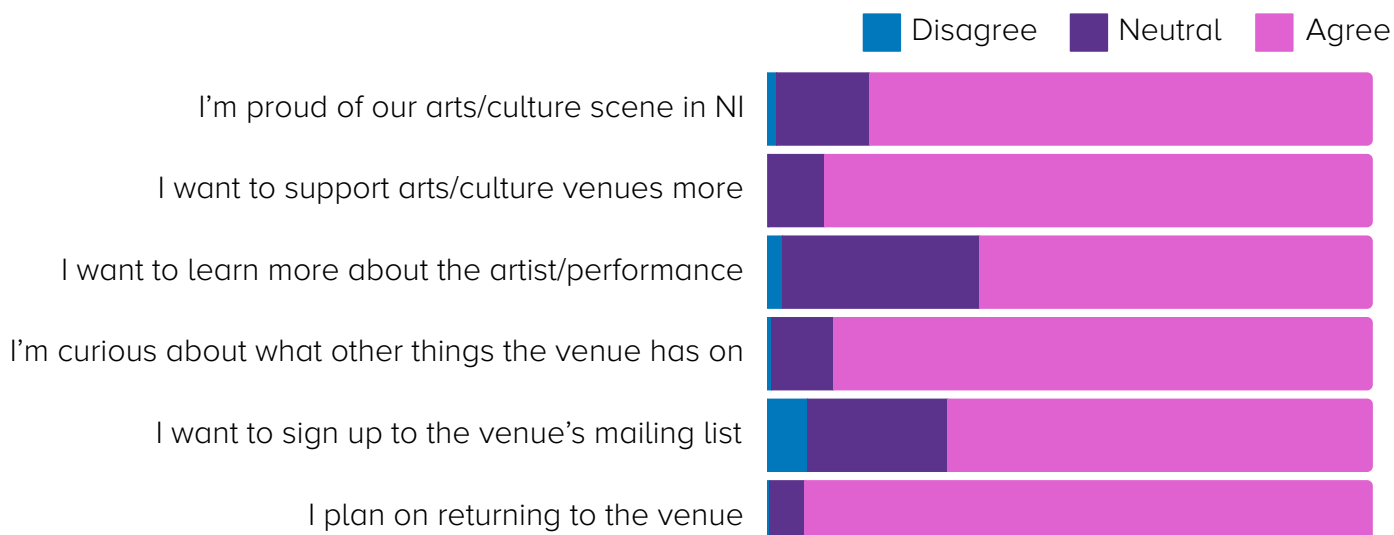


Experiences were very positive. 9-in-10 plan on returning to the venue or want to support arts/culture venues more. An overwhelming amount of respondents are curious about what other things the venue has on, want to sign up to the venue's mailing list and want to learn more about the artist/performance. 89% are proud of our arts/culture scene in NI.

What was your overall experience like?

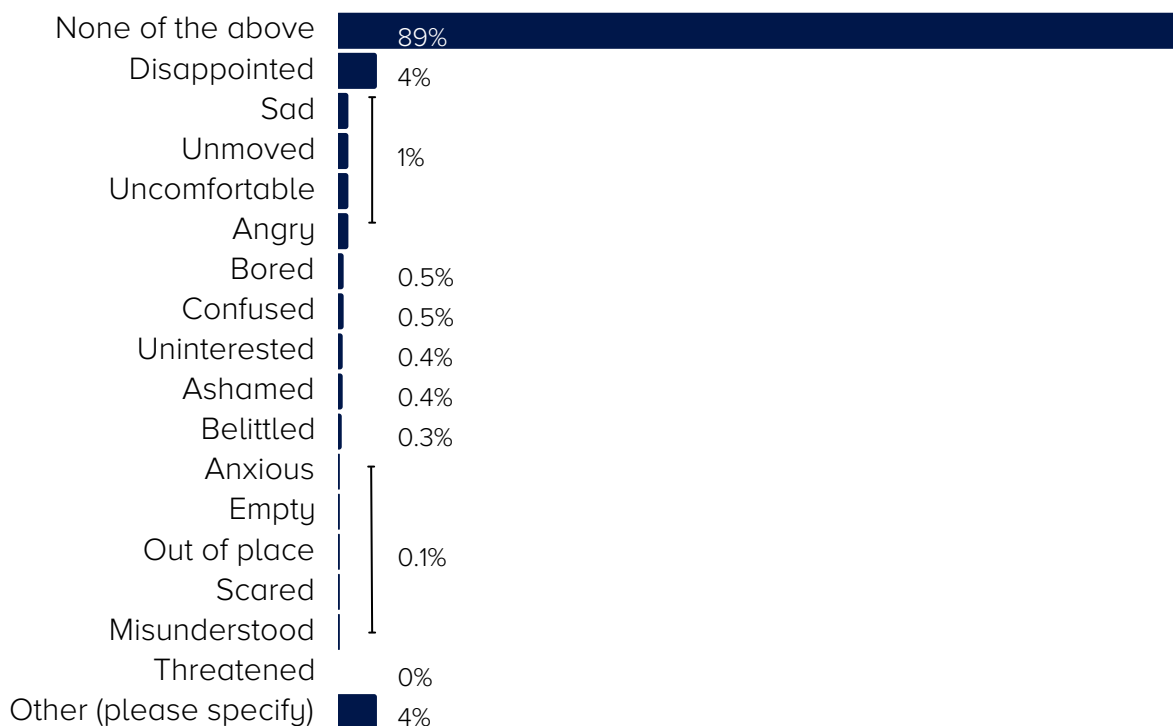
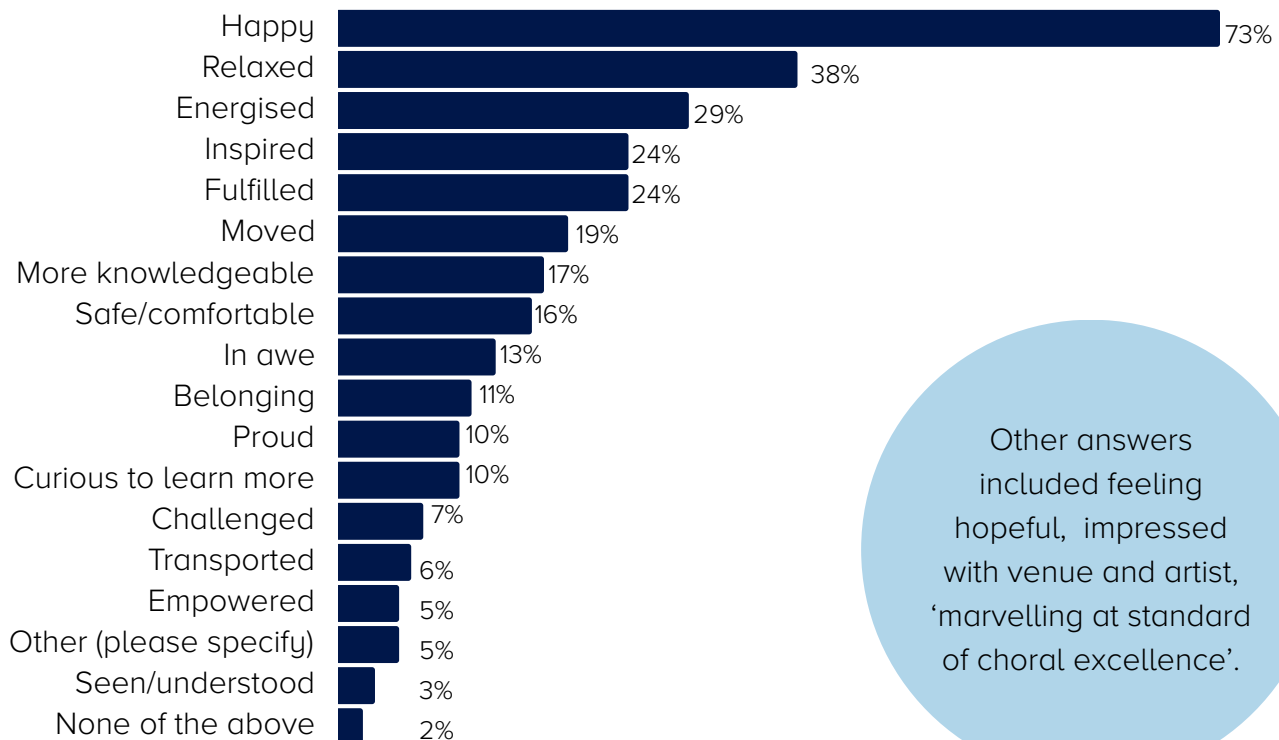


Do you agree or disagree with each of the following statements? After my visit...



Happy was the most widely chosen word to describe how audiences felt. 89% didn't feel any of the negative emotions listed. Of those who did, 4% felt disappointed.

How did you feel after your visit? Please select all that apply.



0

Audiences who reported feeling happy after an event had been to see comedy and music. Those who were inspired went to visual art or dance. Those who were moved, challenged or curious to learn more had attended theatre or dance. Theatre or visual art left the most people feeling more knowledgeable.

	NI Total	Music	Theatre	Comedy	Visual Art	Dance
Happy	73%					
Relaxed	38%					
Energised	29%					
Inspired	24%					
Fulfilled	24%					
Moved	19%					
More knowledgeable	17%					
Safe/comfortable	16%					
In awe	13%					
Belonging	11%					
Proud	10%					
Curious to learn more	10%					
Challenged	7%					
Transported	6%					
Empowered	5%					
Seen/understood	3%					
Other	5%					

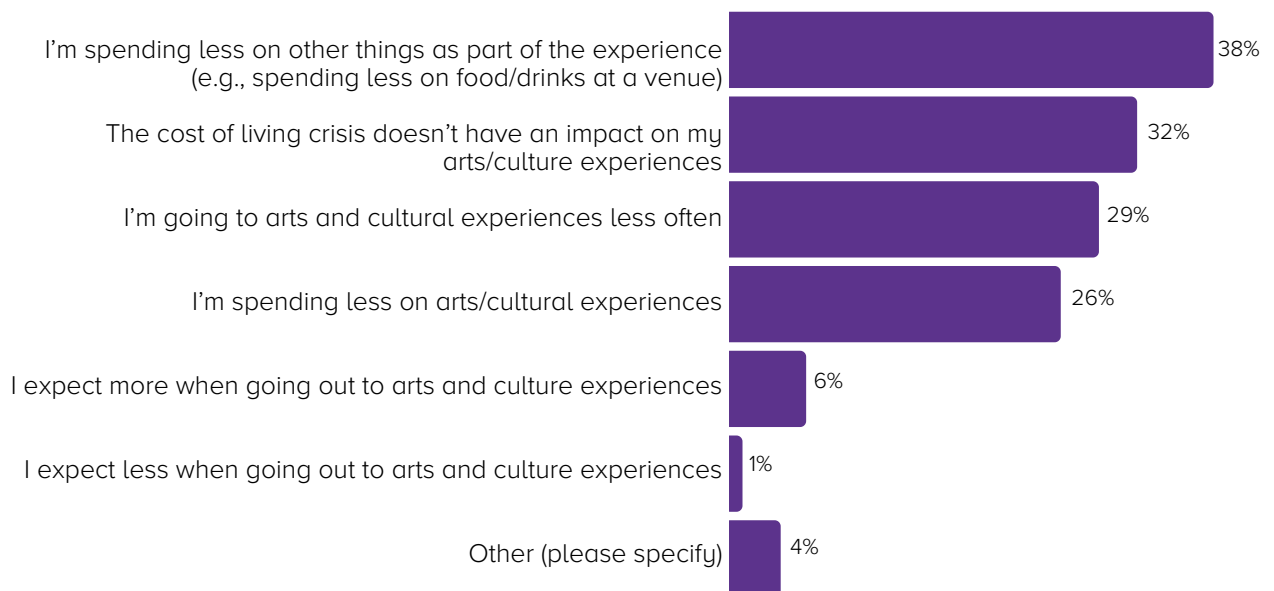
Lower  Higher

COST OF LIVING

HOW THE COST OF LIVING HAS AFFECTED PEOPLE'S SPEND AROUND ARTS ATTENDANCE

29% of audiences are going to arts and culture less often, and more than a quarter are spending less on the experiences themselves.

Is the current cost of living crisis affecting you in any of the following ways? (Please select all that apply).



COST OF LIVING

Older age groups are reporting being less affected by the cost of living compared to younger age groups.

	NI Total	16-24	25-34	35-44	45-54	55-64	65-74	75+
I'm spending less on other things as part of the experience	38%							
The cost of living crisis doesn't have an impact on my arts/culture experiences	32%							
I'm going to arts and cultural experiences less often	29%							
I'm spending less on arts/cultural experiences	26%							
I expect more when going out to arts and culture experiences	6%							
I expect less when going out to arts and culture experiences	1%							
Other (please specify)	4%							
Prefer not to say	6%							

Lower  Higher

HOW DIFFERENT DEMOGRAPHICS ENGAGE WITH ARTS EVENTS

HOW AGE IMPACTS ATTENDANCE - ART FORMS

Younger audiences are more likely to go to music, dance, talks, visual arts and circus (this differs slightly by age bracket though).

Older audience members are more likely to go to music, theatre, and visual arts.

Music concerts or gigs attracted people on both ends of the age spectrum.

Visual arts saw an even spread of ages but was the most attractive art form to young age groups 20-34.

	NI Total	16-24	25-34	35-44	45-54	55-64	65-74	75+
To see a music performance	40%							
To see a theatrical play or musical	25%							
To see comedy	14%							
To see a dance performance	4%							
To listen to a talk by an artist	4%							
To see a visual arts exhibition	3%							
To participate in an activity	3%							
To see a circus performance	1%							
To see a film	1%							
Other	6%							

Lower  Higher

HOW DIFFERENT DEMOGRAPHICS ENGAGE WITH ARTS EVENTS

HOW AGE IMPACTS ATTENDANCE - OVERALL EXPERIENCE

Almost all age groups had food or drinks at the venue or event they went to.

Younger audiences were more likely to spend time in the local area, for e.g. have food or drinks, shopping, or visit other attractions near the venue. The 16-24 audience group was the likeliest age group not to spend or do any other activity outside of the arts event they attended.

Older age groups were more likely to stay overnight, either in paid-for accommodation or at friends or relatives, as part of their experience.

	NI Total	16-24	25-34	35-44	45-54	55-64	65-74	75+
Have food/drinks at the venue	60%							
Go somewhere locally for food/drinks	41%							
Spend time in the local area (e.g., shopping, visiting other attractions)	13%							
Stay overnight in paid-for accommodation	6%							
Stay overnight with friends or relatives	3%							
Other (please specify)	1%							
None of the above	16%							

Lower  Higher

HOW DIFFERENT DEMOGRAPHICS ENGAGE WITH ARTS EVENTS

HOW AGE IMPACTS ATTENDANCE - MOTIVATIONS

As they got older, respondents were less likely to go because they wanted to see a specific performer.

Younger attendees were more likely to go for a variety of reasons (experience something new, get out of the house, feel like part of a community, celebrate a special occasion). When asked to pick one, they leaned towards social motivations (they were more likely to want to go with friends and family) or seeing a specific artist.

Older age groups were more driven by supporting the venue, being inspired/uplifted, learning something, celebrating, or being challenged.

Are any of the following reasons why you made your visit? Please select all that apply.

	NI Total	16-24	25-34	35-44	45-54	55-64	65-74	75+
To be entertained	75%							
To see a specific artist, performer, or speaker	51%							
To spend time with friends/family	47%							
To support the venue/space	38%							
To be inspired or uplifted	31%							
To experience something new	22%							
To get out of the house	18%							
To feel like part of a community	14%							
To learn something	11%							
To celebrate a special occasion	10%							
To be challenged	7%							
To entertain my kids	7%							
To satisfy a professional interest	6%							
Other	4%							

Lower  Higher

HOW DIFFERENT DEMOGRAPHICS ENGAGE WITH ARTS EVENTS

HOW AGE IMPACTS ATTENDANCE - IMPACT

Younger audiences selected a wider range of positive words to describe how the event made them feel. Older audiences were more likely to feel relaxed, more knowledgeable and challenged.

As very few respondents overall selected negative feelings, it wasn't possible to compare different age groups.

How did you feel after your visit? Please select all that apply.

	NI Total	16-24	25-34	35-44	45-54	55-64	65-74	75+
Happy	73%							
Relaxed	38%							
Energised	29%							
Inspired	24%							
Fulfilled	24%							
Moved	19%							
More knowledgeable	17%							
Safe/comfortable	16%							
In awe	13%							
Belonging	11%							
Proud	10%							
Curious to learn more	10%							
Challenged	7%							
Transported	6%							
Empowered	5%							
Seen/understood	3%							
Other	5%							
None of the above	2%							

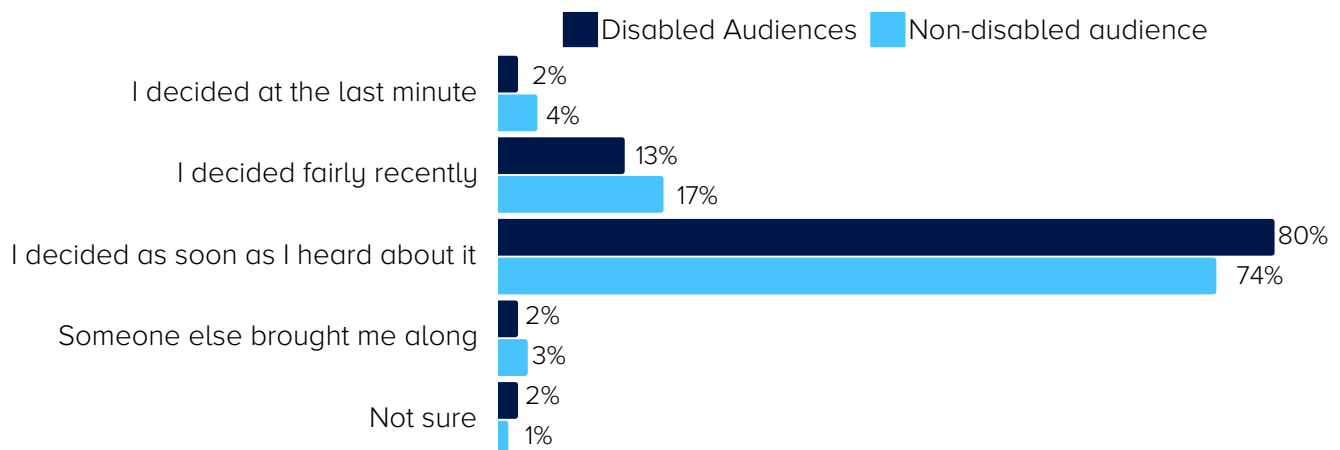
Lower  Higher

HOW DIFFERENT DEMOGRAPHICS ENGAGE WITH ARTS EVENTS

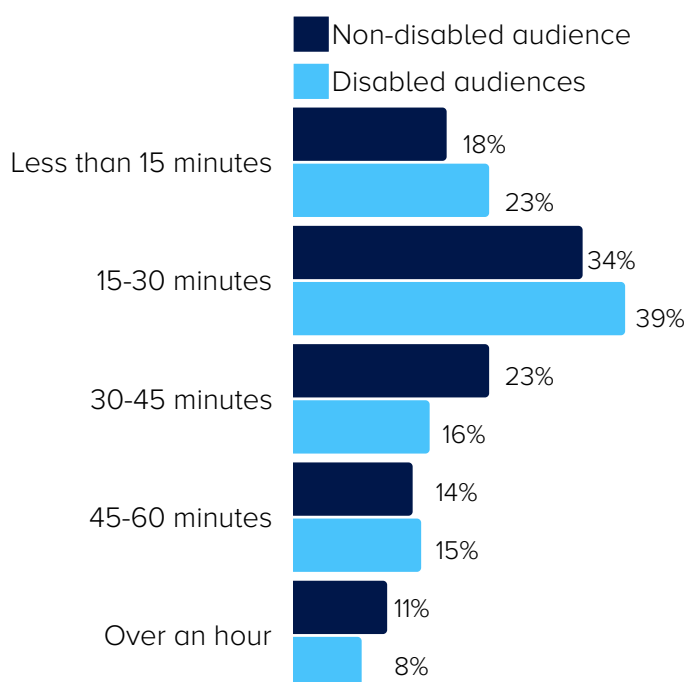
HOW DISABILITY IMPACTS ATTENDANCE - BEHAVIOUR

Disabled audiences tend to live closer to the venues they attend. They usually attend with extended family and are less likely to book as soon as they heard (12%). They rate their overall experience as slightly less satisfactory than non-disabled audiences, possibly because their needs may have not been met at the venue or event they attended.

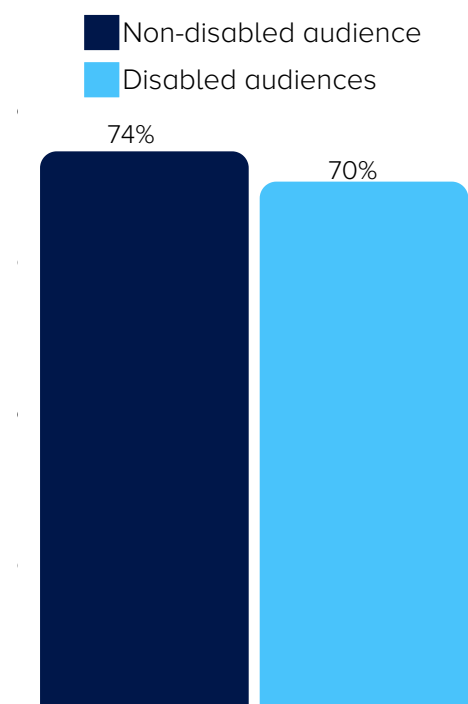
How far in advance did you decide to visit?



Approximately how long did your journey take?



Rated overall experience as very good

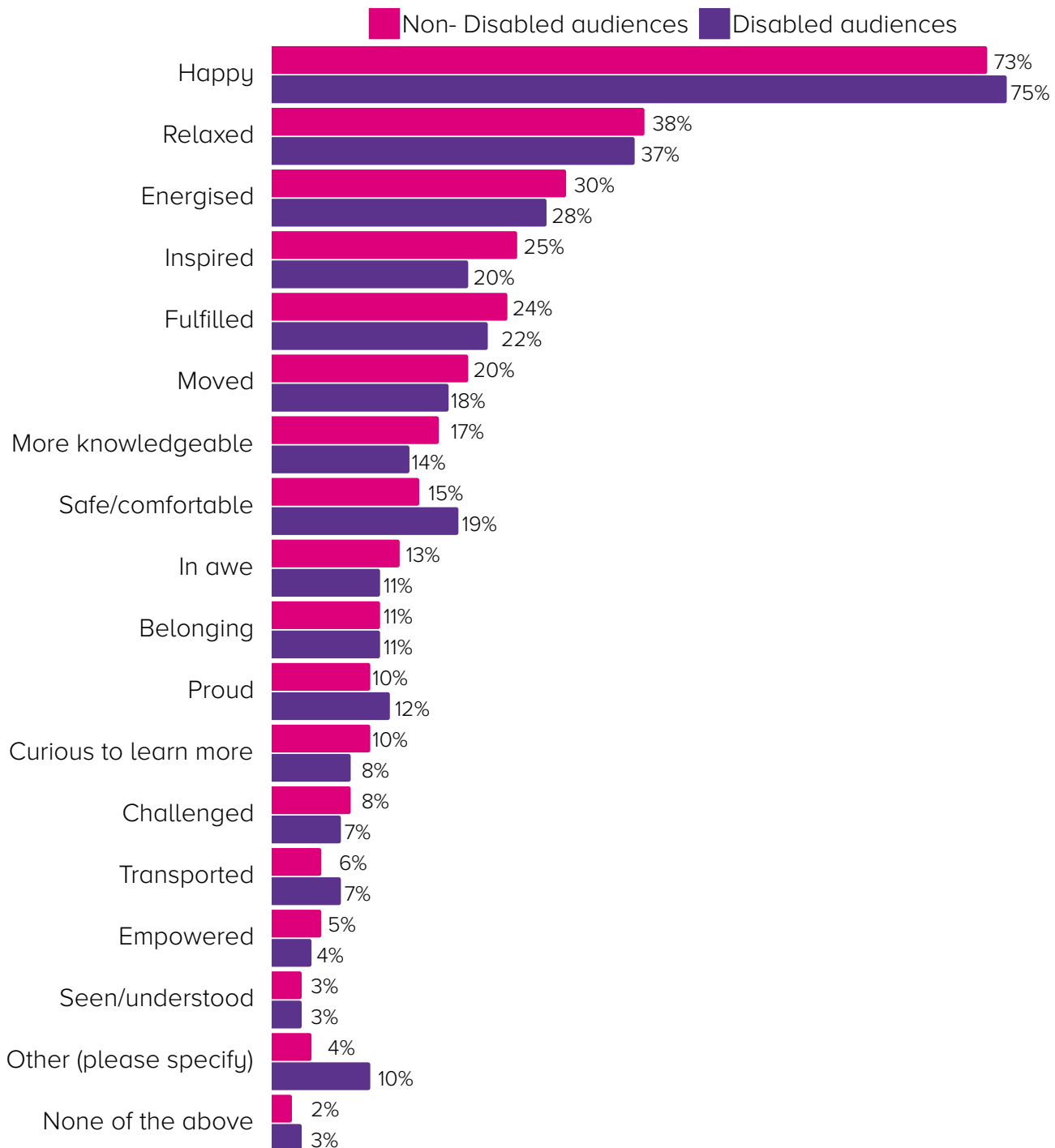


HOW DIFFERENT DEMOGRAPHICS ENGAGE WITH ARTS EVENTS

HOW DISABILITY IMPACTS ATTENDANCE - IMPACT

Disabled Audiences are more likely to feel happy, safe or comfortable, proud and transported. Other answers included feeling intrigued, content, and glad that they had contributed.

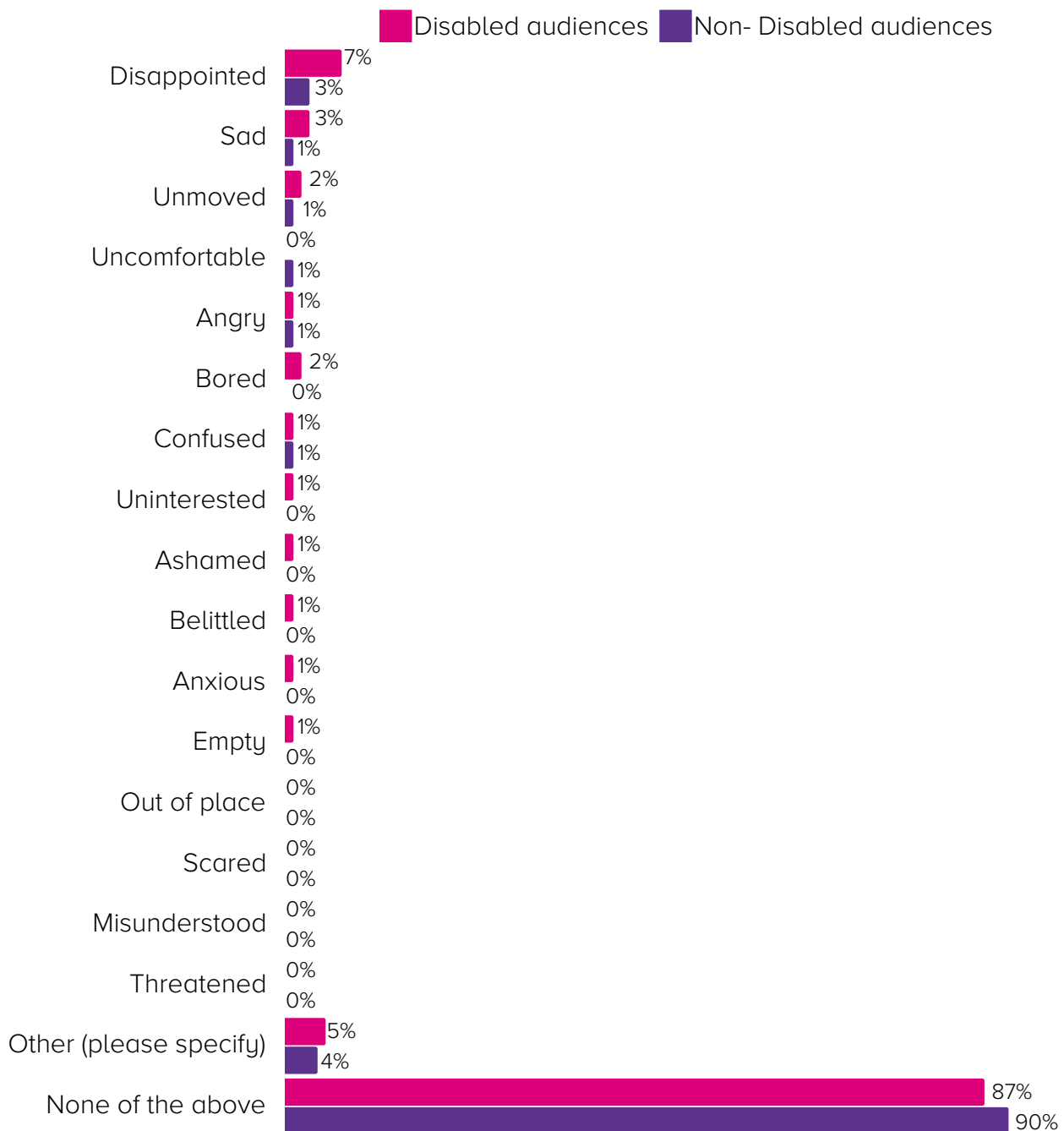
How did you feel after your visit? Please select all that apply.



HOW DIFFERENT DEMOGRAPHICS ENGAGE WITH ARTS EVENTS

Disabled audiences were more likely to select negative words to describe how they felt, particularly disappointed. Other comments included accessible seating in the bar area and lack of low seating.

How did you feel after your visit? Please select all that apply.

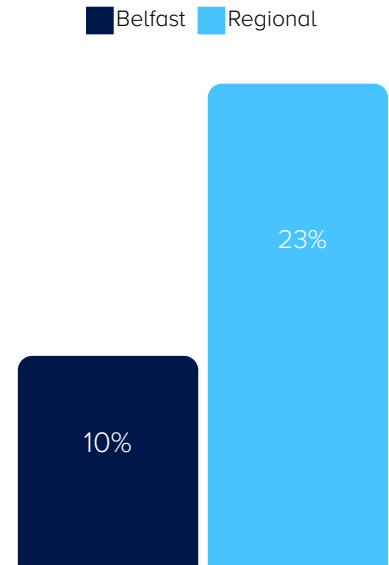


HOW DIFFERENT DEMOGRAPHICS ENGAGE WITH ARTS EVENTS

HOW GEOGRAPHY IMPACTS ATTENDANCE - BEHAVIOUR

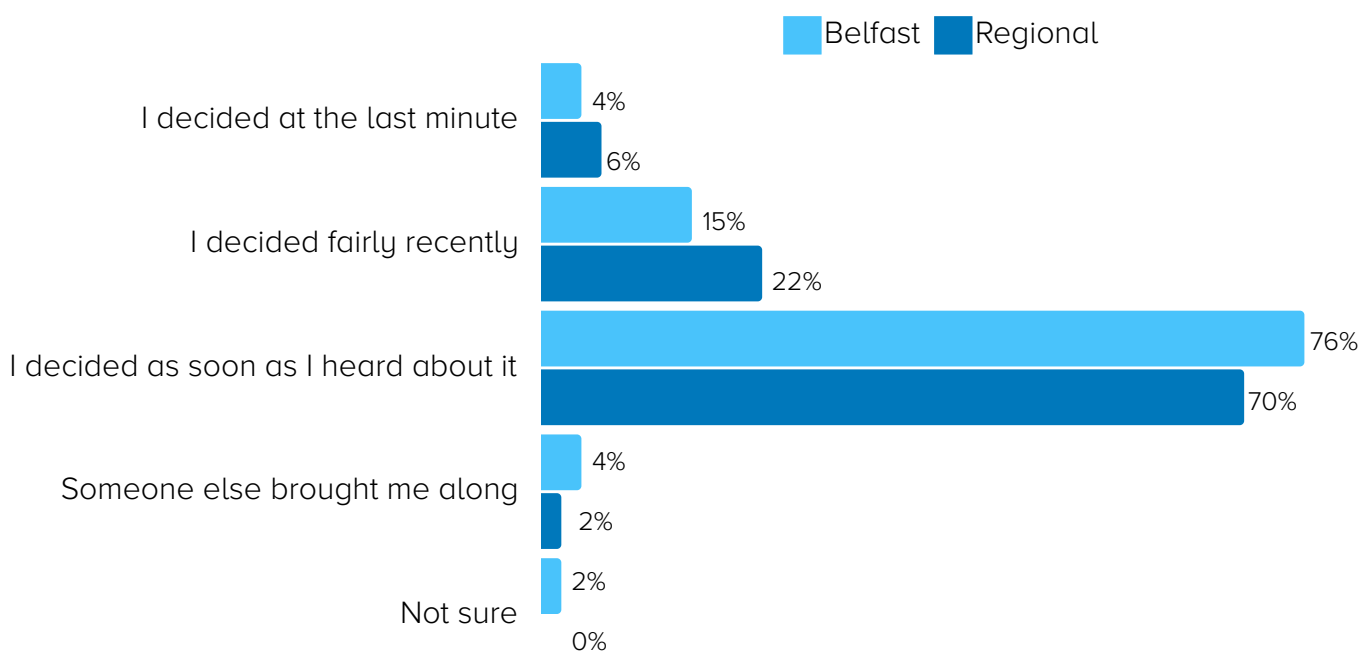
First time visiting building/space

Audiences for regional venues were 13% more likely to be new to the space.



Regional venues' attenders are late decision-makers, with 28% who said they decided to visit at the last minute or fairly recently.

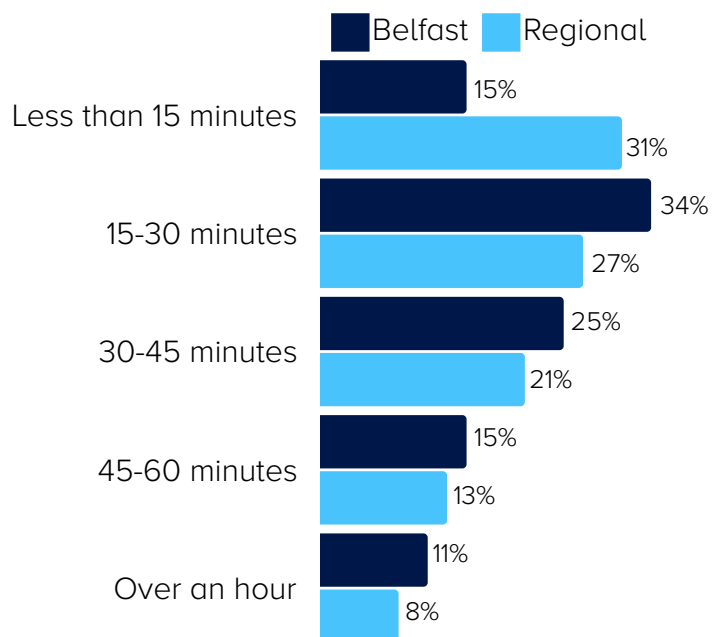
How far in advance did you decide to visit?



HOW DIFFERENT DEMOGRAPHICS ENGAGE WITH ARTS EVENTS

Audiences for regional venues are hyper-local, with 58% of them traveling less than half an hour. In comparison, only 15% of audiences for Belfast venues travelled less than 15 minutes.

Approximately how long did
your journey take?



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