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IMPACT:

Impact Measurement of People Attending Culture Today

SECTOR REPORT

February 2025

PRINCIPAL FUNDER
arts council of Northern Ireland

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 analyses. Research into 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 report, you will see new insights into audience motivations, behaviours, and demographics, broken down by artform.

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The IMPACT Survey is supported by the Arts Council of Northern Ireland.

Introduction

"Without data, all we have is an opinion." – W. Edwards Deming
For over 30 years, audience development has shaped the arts, guided by shifting cultural policies and evolving priorities. But until now, Northern Ireland has never had a research programme that collects and analyses audience data across all art forms and events—ticketed and non-ticketed alike.
Enter IMPACT.

IMPACT is thrive's research programme that provides the first Northern Ireland audience dataset, offering valuable insights at both policy and practice levels. This isn't just another set of top-line figures—it's data that moves the conversation forward.
IMPACT reveals that each art form has distinct strengths and challenges. Some events attract tourists, while others foster local connection and community identity. Audience behaviour shifts with life stage, influencing not just what people attend but who they attend with.
For the first time, we have the evidence to confirm what many have long suspected: there is no single, universal approach to audience development. Each art form engages different people for different reasons, delivering unique experiences.
Beyond audience insights, **IMPACT proves the economic and social value of the arts**. It shows, with data, that the arts enrich lives and strengthen communities. Now, we have the knowledge to harness those benefits more effectively than ever before.

How was the research conducted?

- 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 lists and on social media. Some organisations used paper surveys and others printed QR codes on flyers and posters.
- We recommended that each organisation gather a minimum of 100 responses over the course of the year.
- Each organisation was provided with their own live reporting link so they could view their data in real time.

29 arts organisations across Northern Ireland have been taking part in the IMPACT survey. Over 4,200 survey responses were collected from September 2023 to July 2024.

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Section One

Audience profile

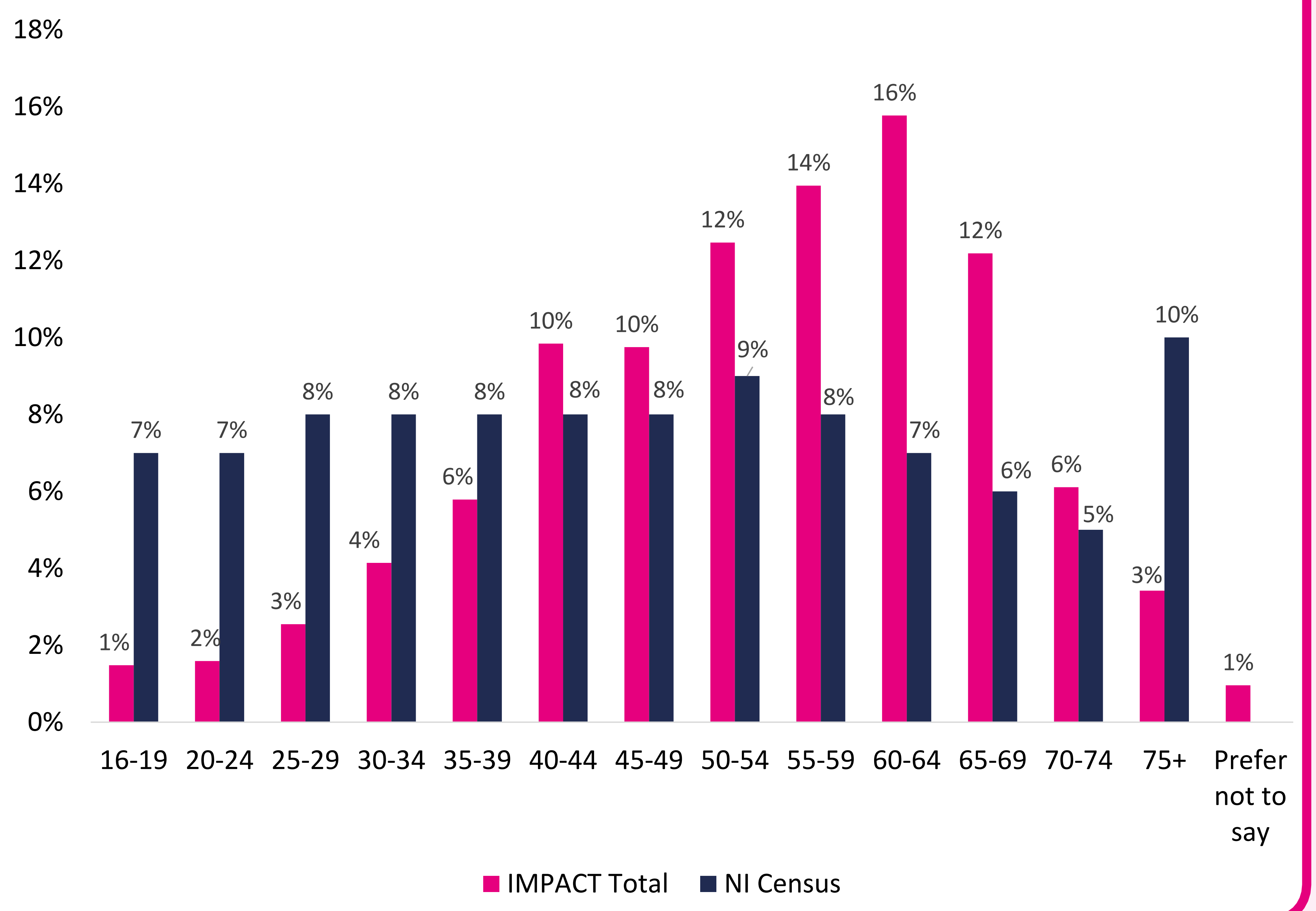
Most attenders are aged over 45

IMPACT shows audiences for arts venues are generally older than the average population. Arts spaces in NI generally attract people in the middle age groups and nearly two-thirds (74%) of respondents were over the age of 45.

General population arts research in Northern Ireland, however, shows those in younger age groups were more likely to have been to different arts activities or events in the past year (18-34, 87%: 35-59, 75%; 60+, 61%).

Placing these two pieces of data together gives us greater insight, suggesting that younger audiences are engaging with arts and culture, just not in dedicated arts and culture spaces.

How old are you?



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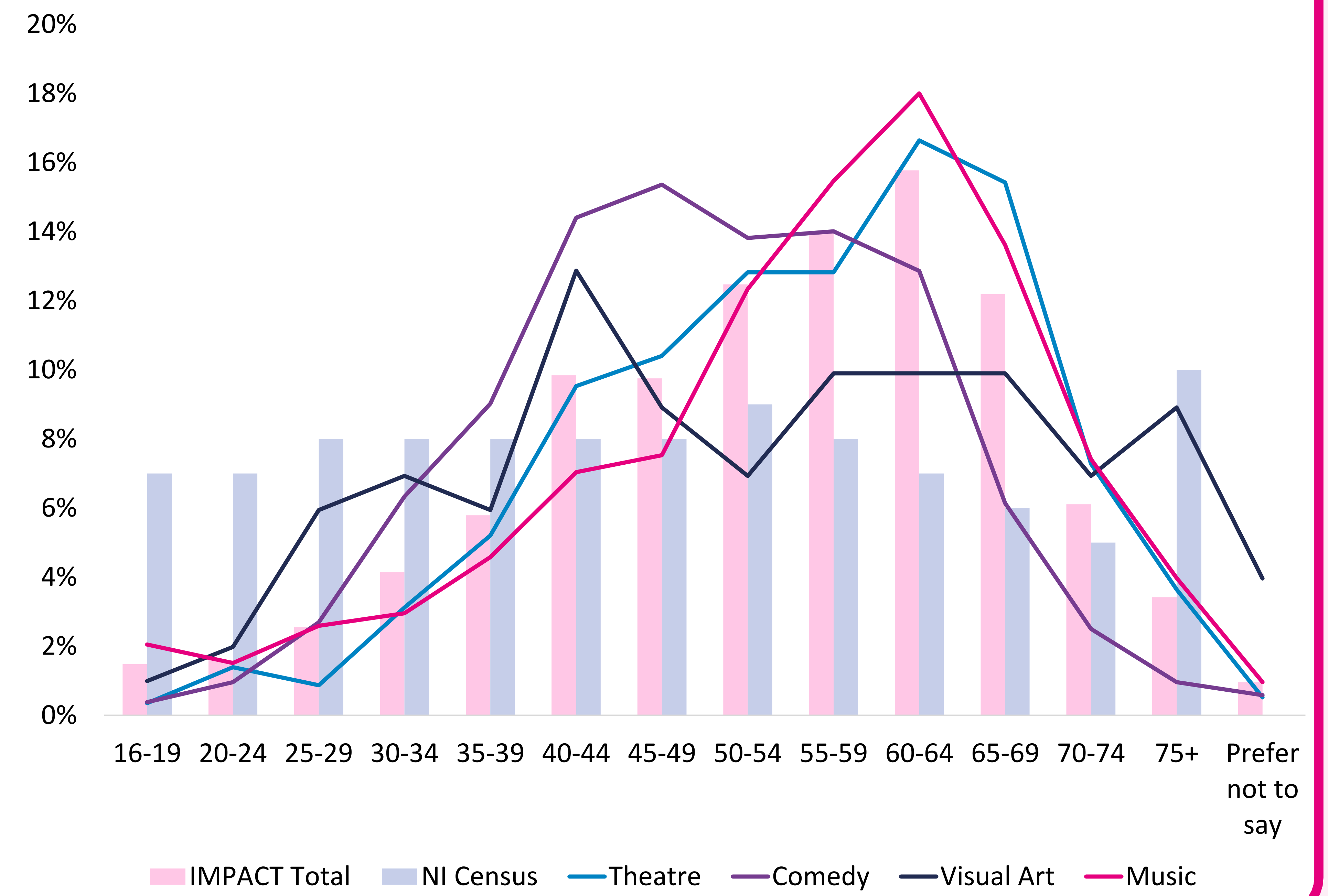
Age impacts artform engagement

Whilst attendance to most artforms increases with age, they all have different profiles. Visual arts audiences are more likely to be on the lower and higher ends of the age spectrum, with more under 45 and over 70.

Theatre audiences are generally older - 43% are age 60 and older, compared to the IMPACT total average of 37%.

How old are you?



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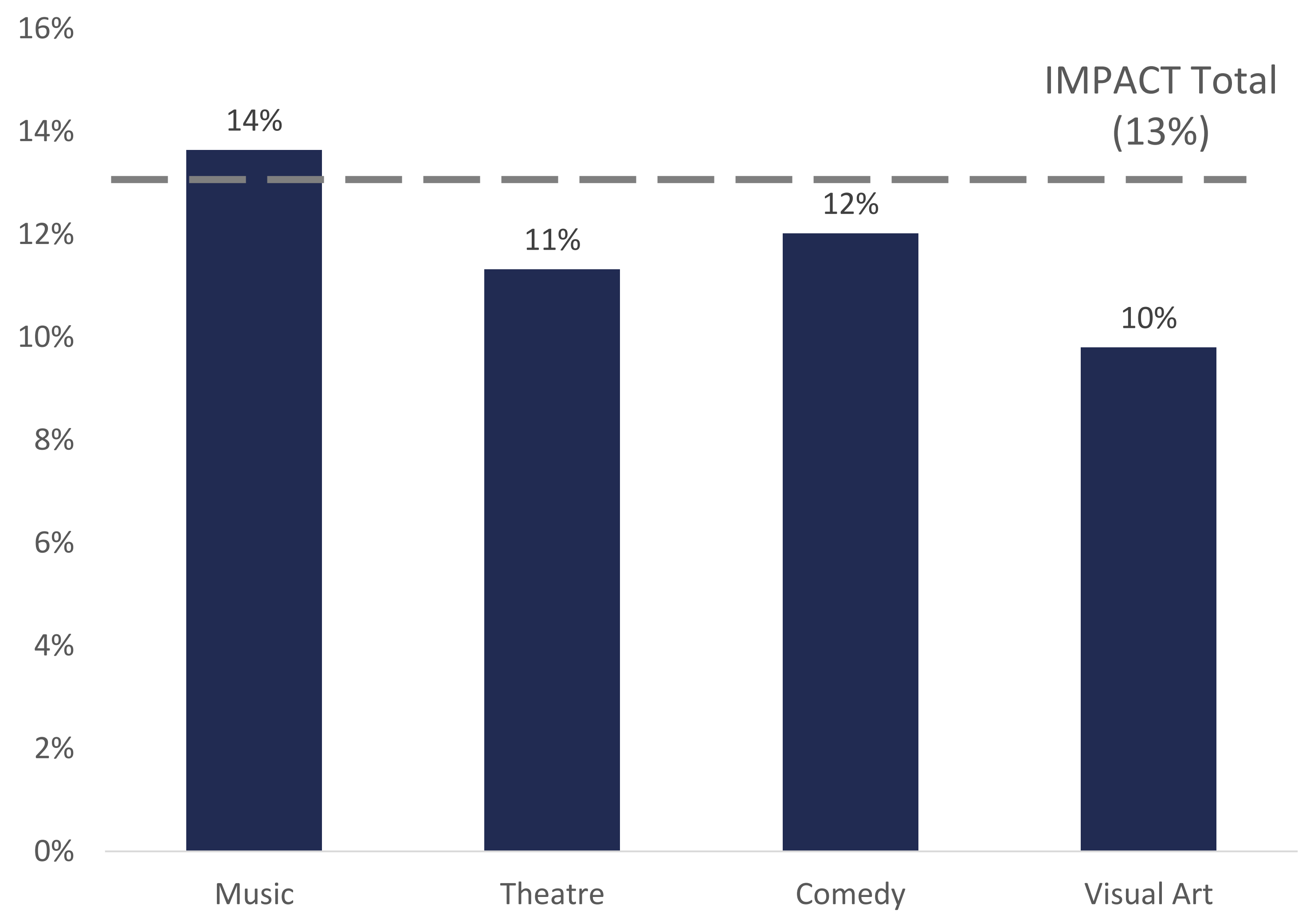
13% of audiences are disabled or D/deaf

Disabled audiences comprised 13% of IMPACT responses, much lower than the 2021 NI Census, which recorded 24% of people reporting having a limiting long-term health problem or disability.

Previous baseline surveys by thrive and other population data shows high levels of attendance: 61% of adults with a disability in Northern Ireland had attended in the last year. Although the wording and definition of disability can vary, and one size does not fit all for any audience group, together these two data sets suggest that like younger audiences, there is high interest and engagement but not always in dedicated arts and culture spaces.

10% of visual arts attenders are disabled, while 14% of music attenders are disabled. Interestingly, there was no difference in levels of disability when comparing audiences for large vs. small music venues.

The Disability Discrimination Act defines disability as "a physical or mental impairment which has a substantial and long-term adverse effect on a person's ability to carry out day to day activities".
Using the definition above, are you disabled or D/deaf?



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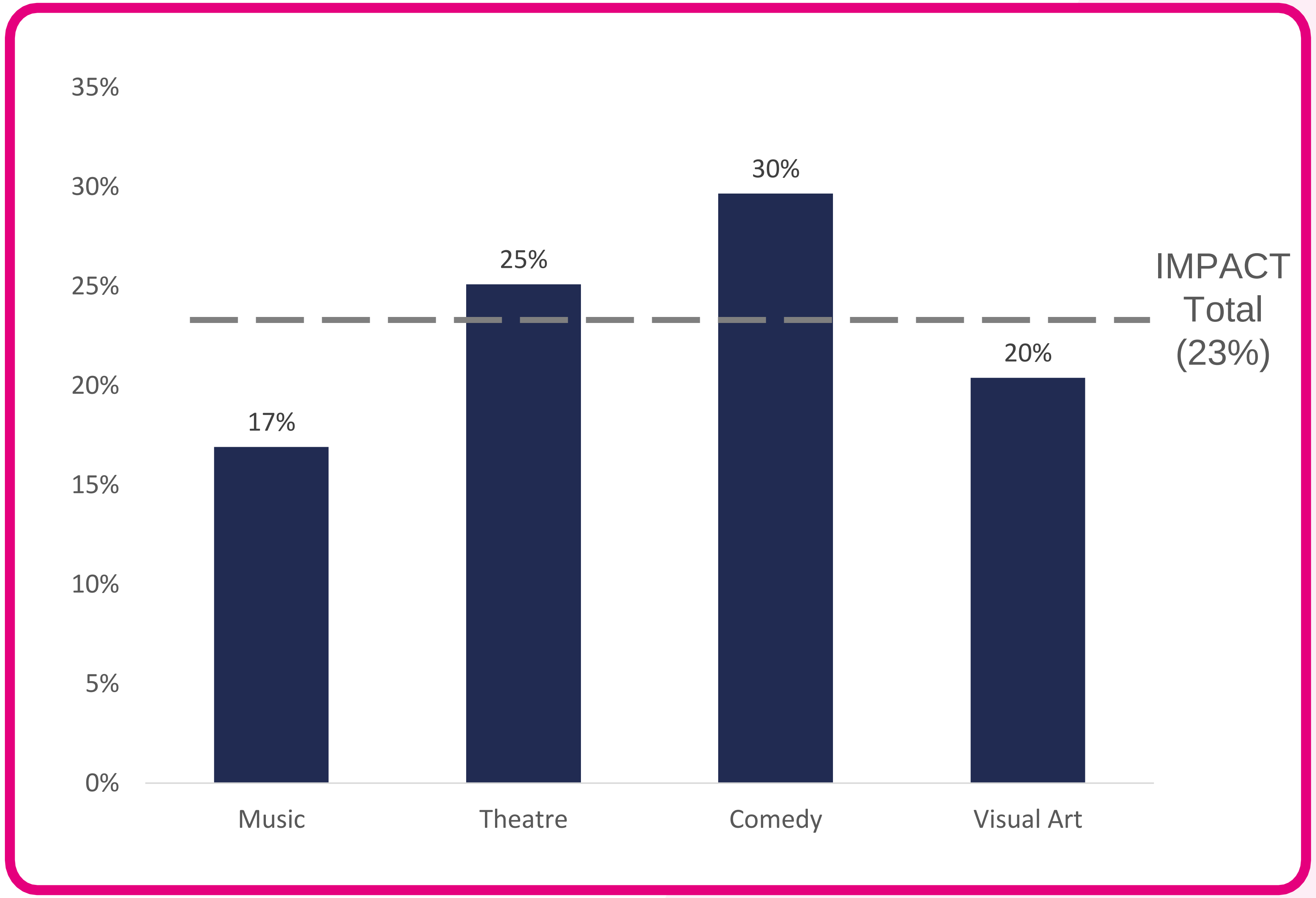
Family circumstances impact the artform people choose

In total, 23% of IMPACT audiences have children under 16 at home. Some artforms have higher proportions of audiences with children – this includes theatre (25%) and comedy (30%).

The latest NI Census shows that 31% of households have dependent children under 18 in the home. This suggests that family circumstances may also be having an impact on parents attending arts and culture in general.

Do you have children under 16 living with you?



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LGBTQI+ audiences are overrepresented

6% of IMPACT respondents identify as LGBTQI+, which is much higher than the 2021 NI Census of 2.1% identifying as lesbian, gay or bisexual - although the wording and options given within the surveys do differ.

15% of visual arts audiences taking the survey described their sexual orientation as LGBTQI+, which is more than double the IMPACT total. This also reflects the fact that like visual arts audiences, LGBTQI+ audiences are younger.

Which of the following best describes your sexual orientation?

	IMPACT Total	Music	Theatre	Comedy	Visual Art
Straight/Heterosexual	88%	88%	89%	92%	76%
LGBTQI+	6%	5%	5%	3%	15%
Prefer not to say	6%	6%	5%	5%	9%
Other (please specify)	1%	1%	0%	0%	0%

Represents a number at least 20% higher than the total average

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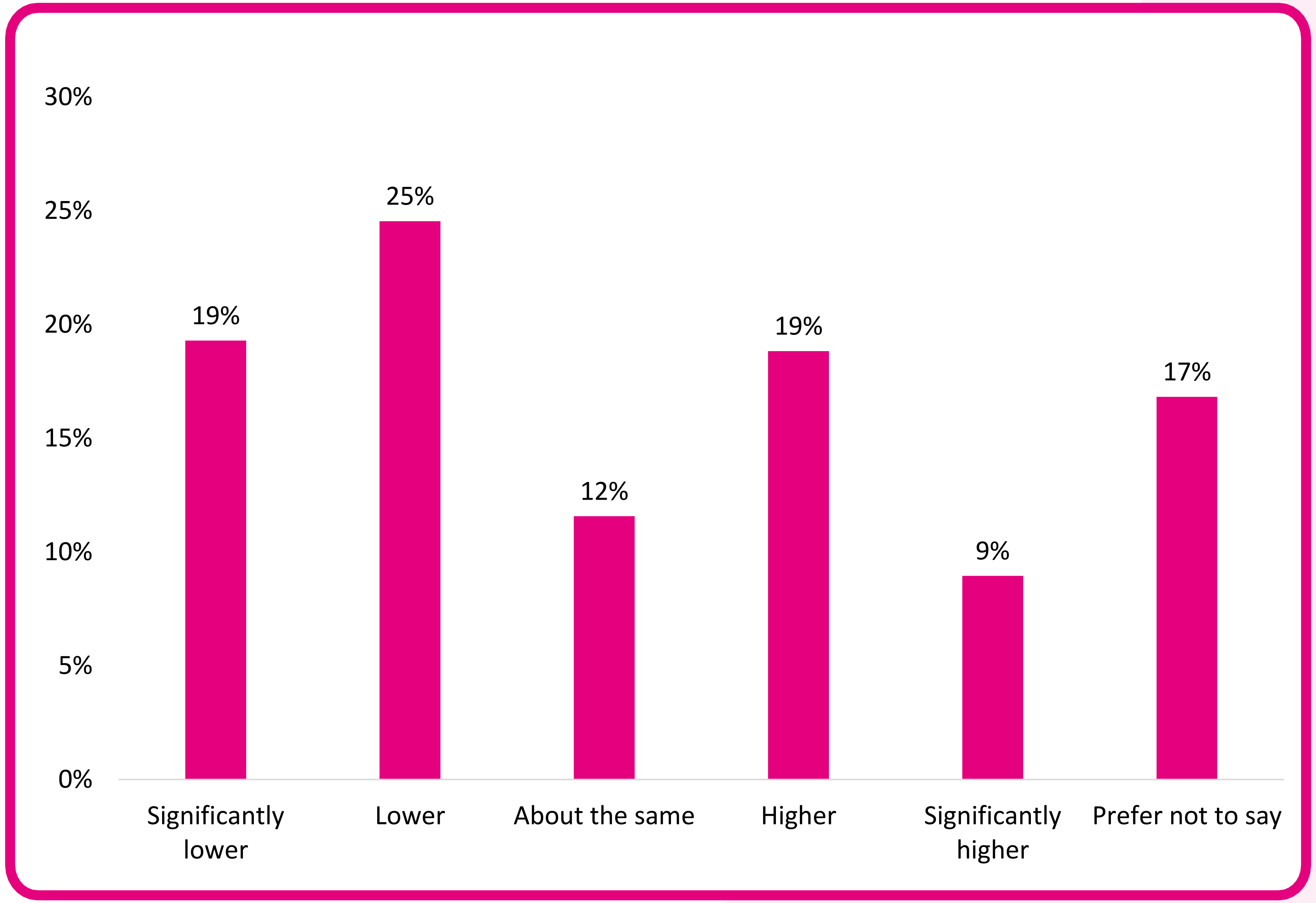
44% of audiences earn less than the median earnings

IMPACT shows **44%** of audiences report earning lower or significantly lower than the median earnings in Northern Ireland, with 28% reporting higher or significantly higher.

In 2023, the median earnings for full-time employees in Northern Ireland was £32,900. How do your earnings compare?*



* Please note that this question was new in April 2024, so the base size is among 648 respondents who took the survey between April-July 2024

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Section Two

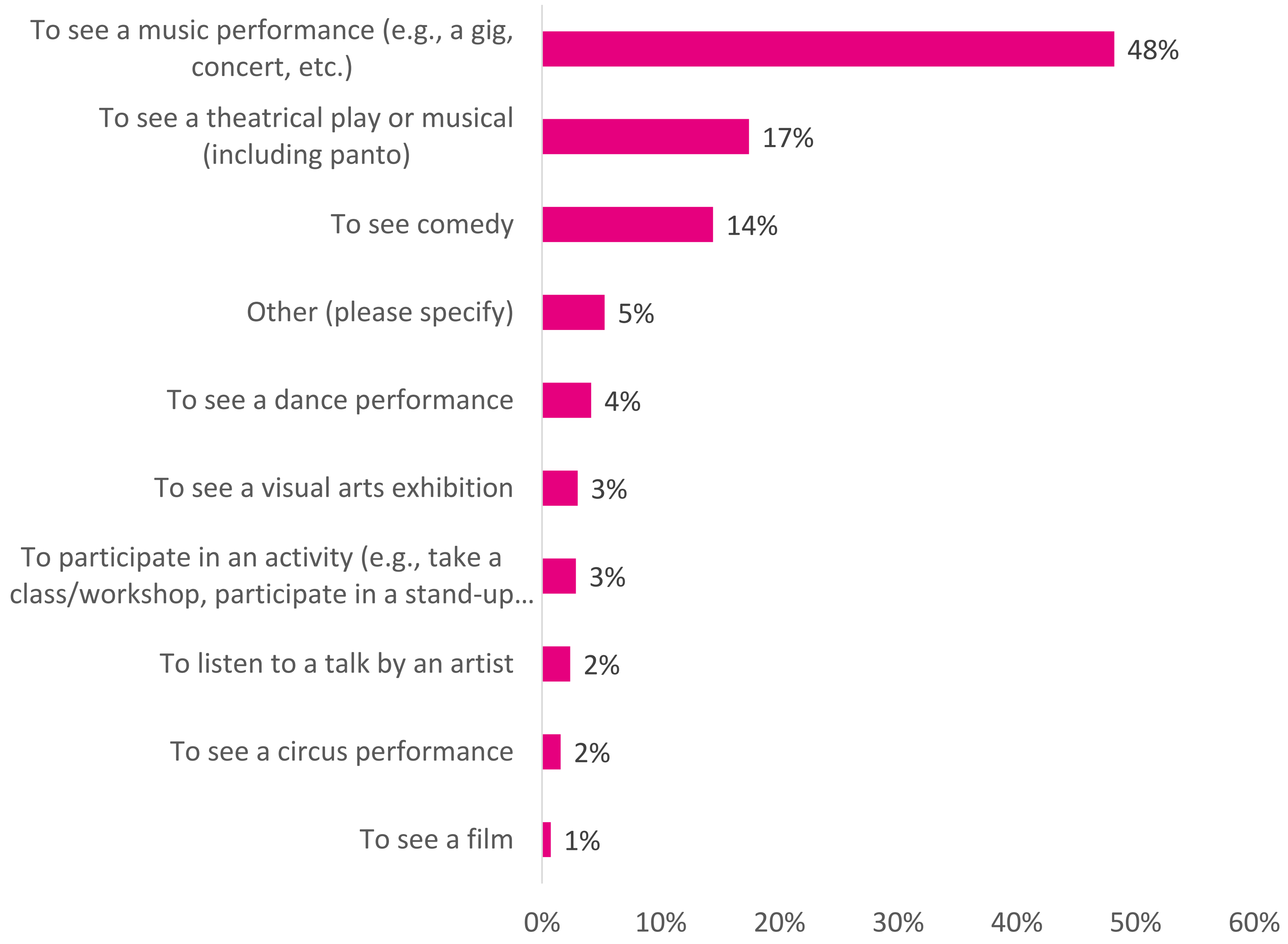
Audience Behaviour

Most people went to a music performance

Nearly half of attendees went to see a music performance (a gig, concert, etc.). This data is related to the events surveyed, as well as pointing to supply and demand: if there is simply more music available and being programmed, music attendance will be higher. Local offer and proximity also play a part.

This data does match population research in both Ireland and Northern Ireland which showed 45% of people had enjoyed a live music performance in the last year and 35% attended a live play, drama, musical, pantomime, or opera.

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



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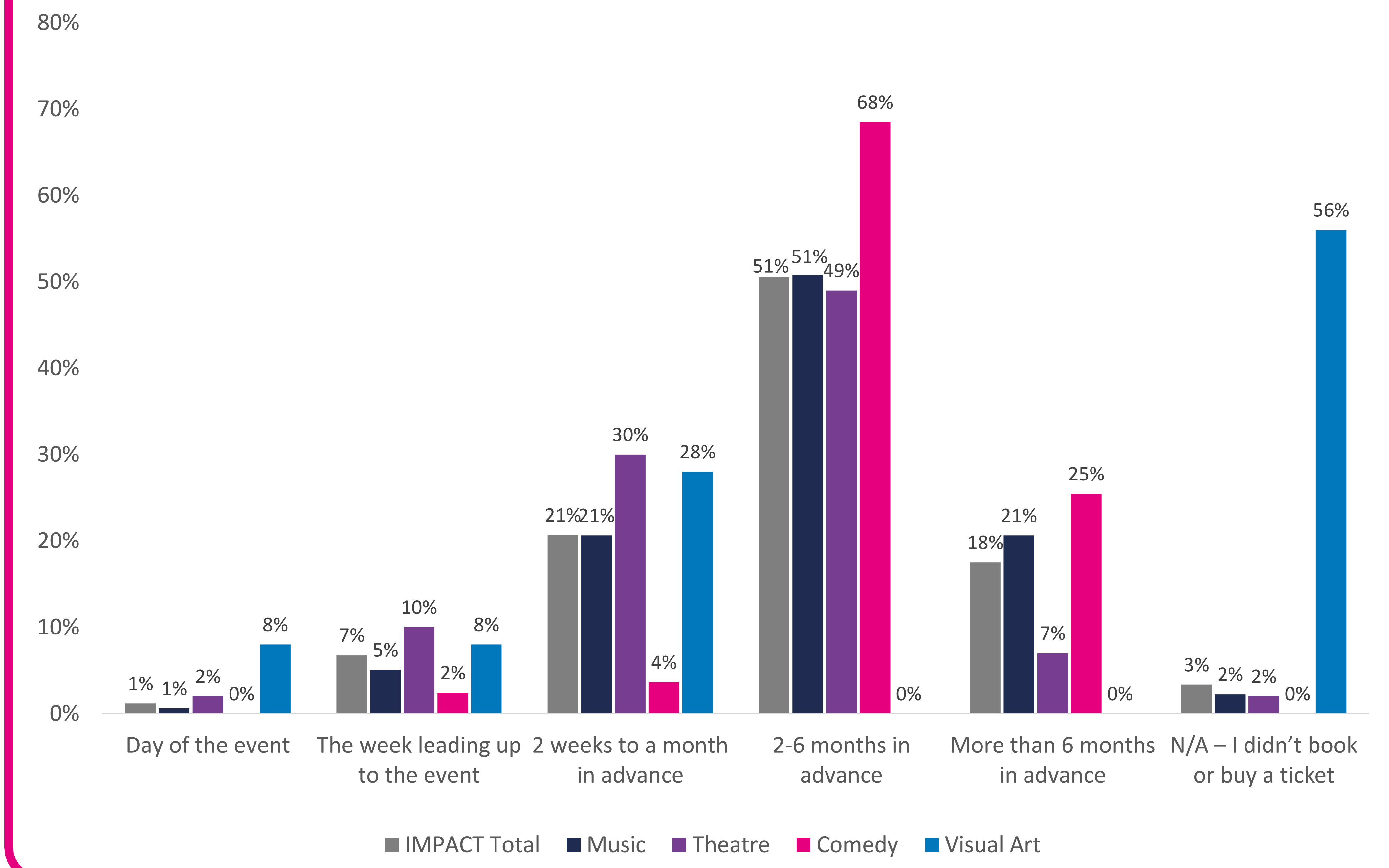
Most audiences book 2-6 months in advance

68% of audiences say they booked at least 2 months before a show. This is out of step with our existing box office data, which showed 28% of transactions taking place on the week of an event.

94% of comedy audiences booked at least 2 months in advance, including 25% who booked more than 6 months in advance of the event.

When did you book your ticket? Please select one.



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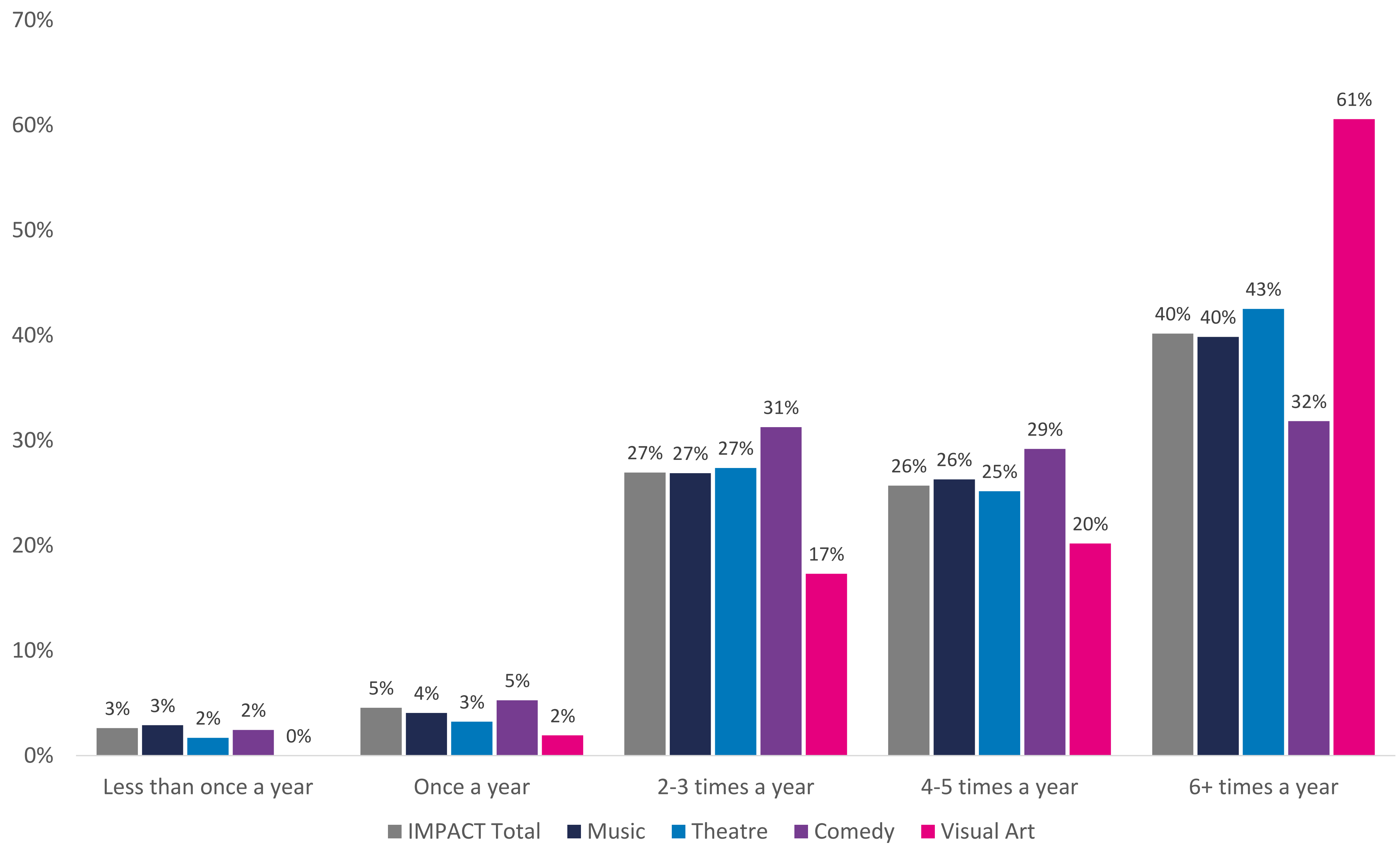
Audiences are very engaged

Population level research shows that people engage in arts and culture often, meaning that they go to events fairly often during the year across multiple venues.

We see similar results in IMPACT – 40% of respondents engage in arts and culture 6+ times a year. However, existing box office data shows that most audiences only attend each venue about once a year.

This points to the reality that while audiences do engage with the sector quite often, venues are **sharing** these audiences who grace their doors just once in a while. To raise the levels of engagement within the sector as a whole, **a more collaborative and strategic approach is needed.**

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



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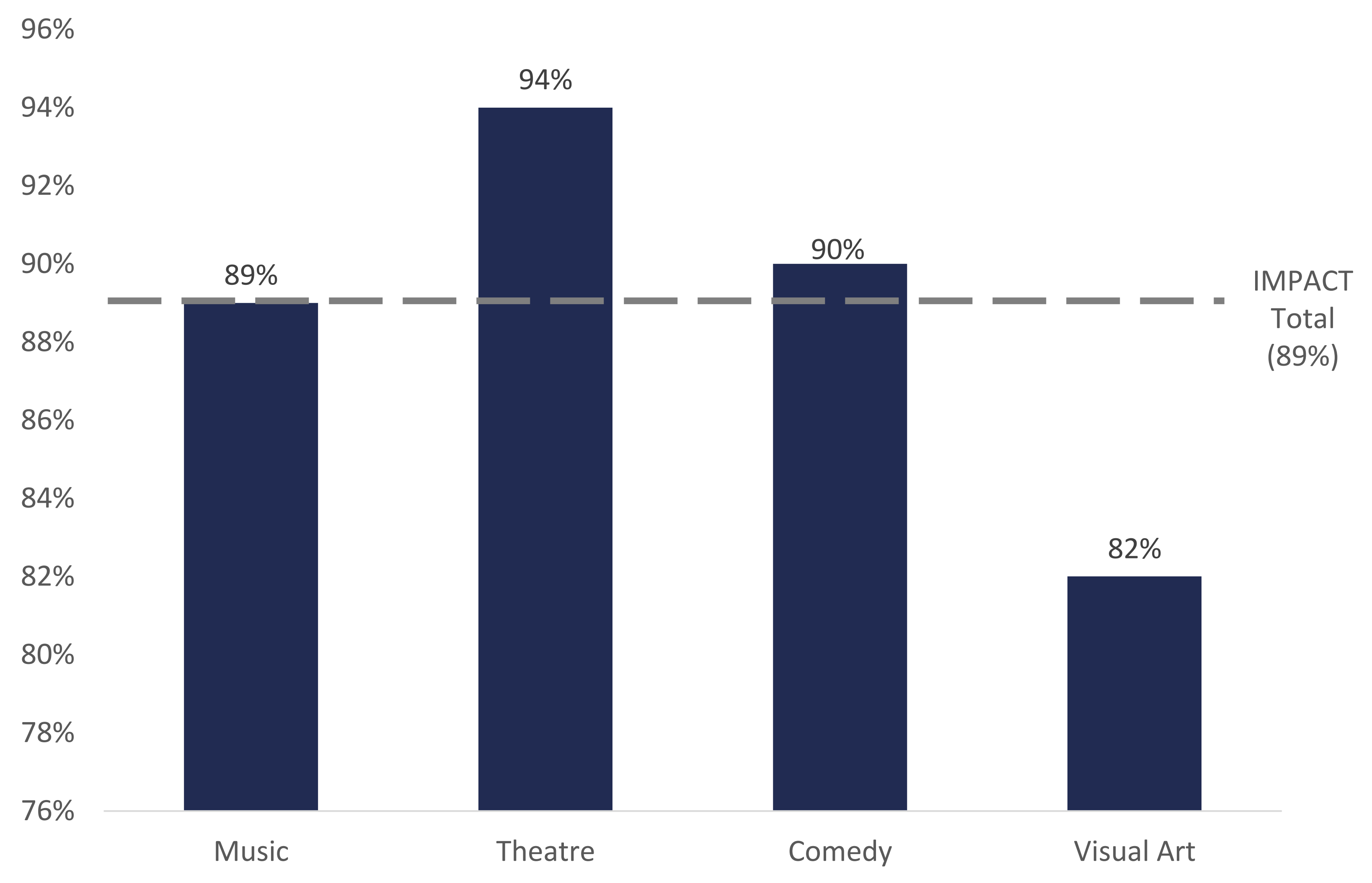
Most audiences are returning

Ticketing data consistently highlights issues with loyalty to individual venues, as just 30% of audiences returned to a specific venue year-on-year prior to Covid in 2019.

However, in IMPACT, 89% of respondents have been to the venue before. Audiences do return to individual venues, just not year-on-year.

Is this your first time visiting this building/space? (% no)



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Audiences are hyperlocal

This matches UK research showing 67% of participants living in the project area of the activity(s) they attended.

Research into Irish audiences shows them to be even more local, with 39% of audiences travelling less than 15 minutes to an event, compared to 19% of IMPACT audiences.

Theatre and visual arts audiences were most likely to be local. 27% of visual arts audiences travelled 15 minutes or less to get to the gallery.

All these figures can be influenced by programming and product in terms of geographical access to different artforms and events, as well as audiences' willingness to travel.

Approximately how long did your journey take?

	IMPACT Total	Music	Theatre	Comedy	Visual Art
Less than 15 minutes	19%	18%	22%	19%	27%
15-30 minutes	35%	34%	36%	35%	33%
30-45 minutes	23%	23%	19%	28%	21%
45-60 minutes	14%	14%	13%	12%	10%
Over an hour	9%	11%	9%	6%	9%

Represents a number at least 20% higher than the total average

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Discovery differs by artform

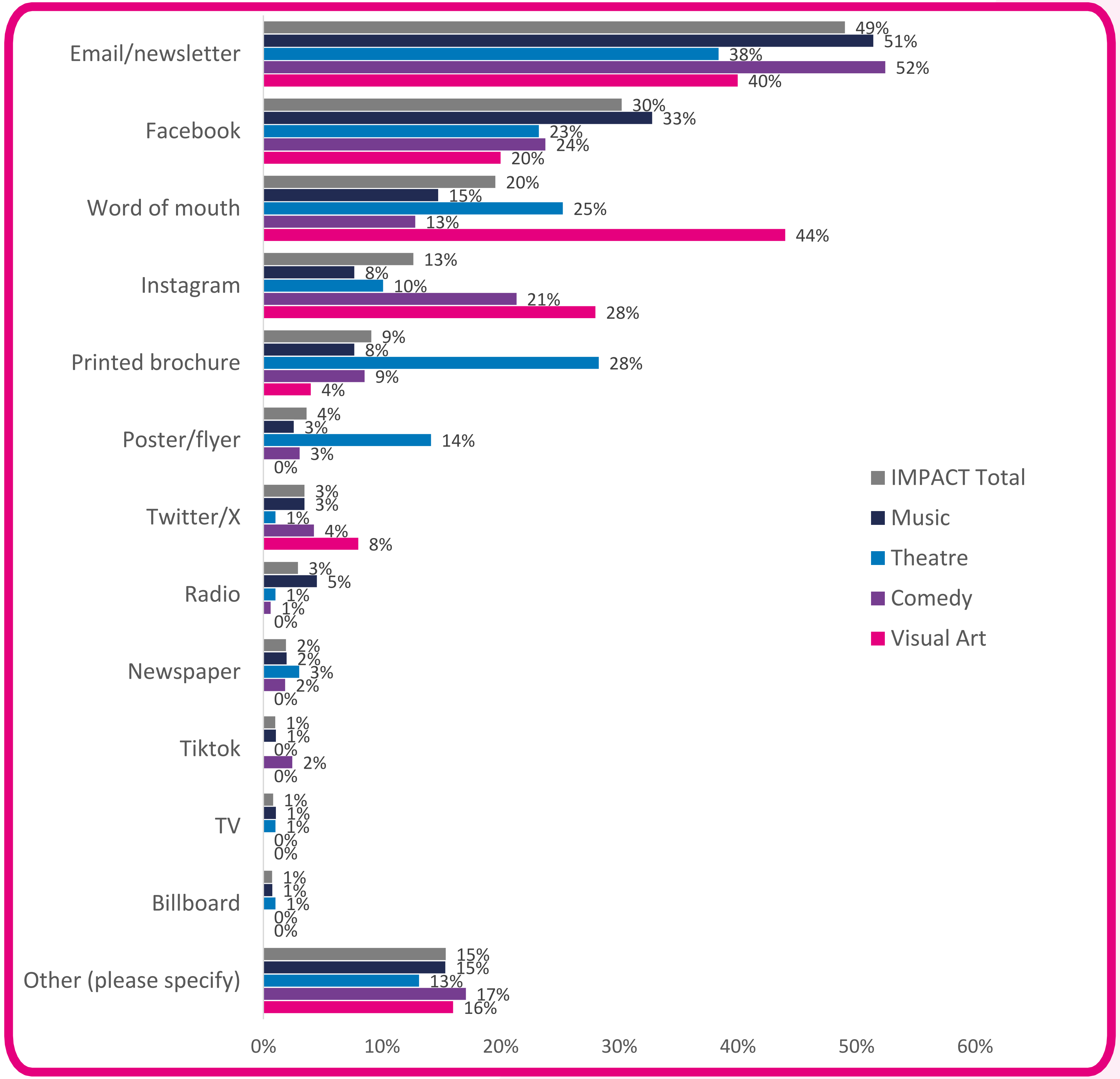
Most responses to IMPACT were gathered by post-visit emails, so it's unsurprising that most heard about the event through email or newsletter.

However, population research in Northern Ireland shows most people usually get information on arts activities to attend or participate in from social media (60%).

For theatre audiences, however, print isn't dead. They were more than three times as likely to hear about events through a printed brochure or poster/flyer.

Visual arts audiences were more than twice as likely to have heard about the event/space through word of mouth and Instagram.

Which of the following ways did you hear about the event/space? Please select all that apply.



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Arts visits are social events

Only 10% of attenders came alone. This matches existing box office data on single tickets. But box office data does not account for separate tickets purchased by individuals planning to go together, or tell us about non-ticketed events.

IMPACT shows that what people are going to seems to be a large factor in who they choose to attend with.

For example, visual arts attracted a higher proportion of solo visitors than any other art form, with over a third (36%) attending alone—more than three times the IMPACT total.

Theatre audiences are more likely to attend with younger children or with a group.

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

	IMPACT Total	Music	Theatre	Comedy	Visual Art
I came alone	10%	9%	10%	3%	36%
I came with my spouse/partner	49%	52%	40%	64%	21%
I came with friends/colleagues	25%	26%	26%	26%	26%
I came with other family members (e.g., parents, siblings, cousins, or extended family)	22%	21%	25%	17%	10%
I came with children aged 11 and younger	7%	3%	15%	1%	12%
I came with children aged 12-18	6%	5%	7%	4%	6%
I came as part of an organised group	1%	0%	2%	0%	4%
I came as a carer	1%	1%	1%	0%	1%
I came with my carer	1%	1%	0%	1%	0%
Other (please specify)	2%	1%	2%	1%	1%

Represents a number at least 20% higher than the total average

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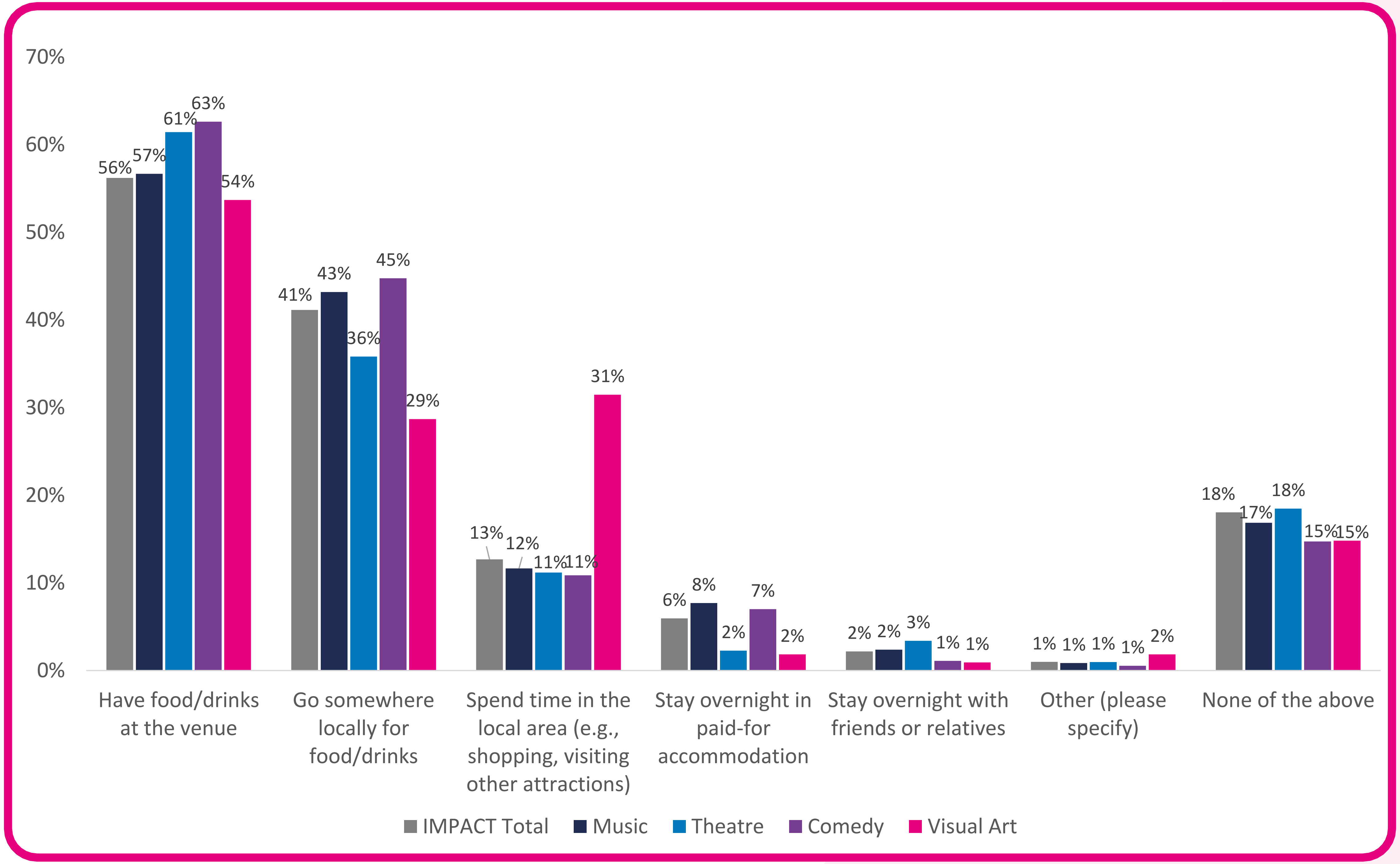
A stop among many

IMPACT also helps us build a picture of how arts and culture fits into someone's day.

Comedy audiences were most likely to get food or drinks either at the venue or locally. Visual arts audiences were more than twice as likely to spend time in the local area. This is consistent with what we observed in our iBeholder research and surveys for other visual arts spaces. Audiences typically combine a visit to an art gallery with other activities in the local area – it's often one stop among many.

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



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People spend when visiting

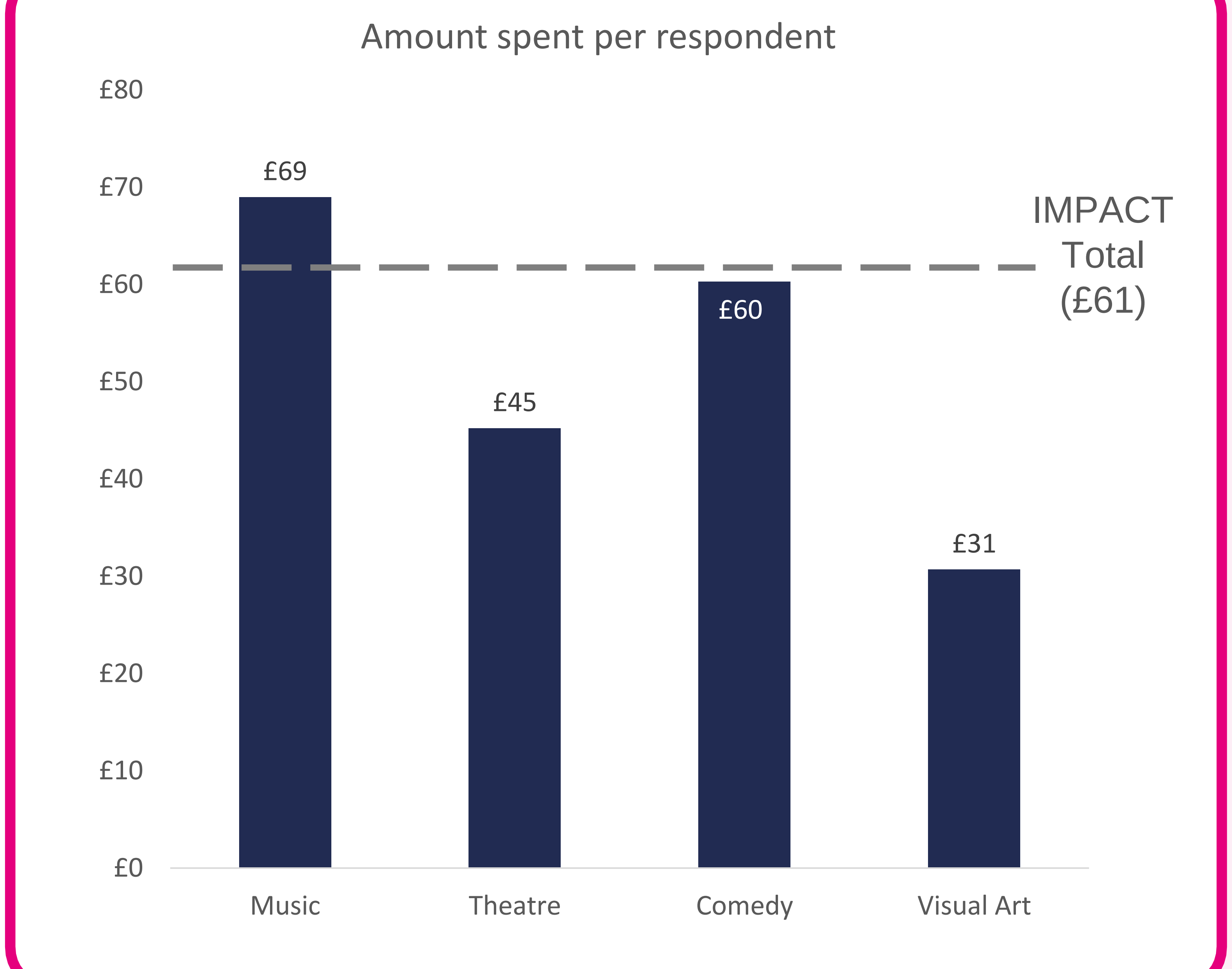
Research has shown that NI spent more per head of the population on recreation, culture and religion than any other region in the UK, including London.

So it's no surprise that most IMPACT respondents spend locally when visiting arts and culture, spending £61 on average.

Music respondents who gave an answer spent £69 on average. Audiences of large music venues typically spent more, £73 on average, while those attending smaller venues spent £46.

Visual arts attenders spent roughly half the total, at £31.

You mentioned you spent money on food/drinks (either at the venue or somewhere locally), spent time in the local area, or stayed overnight in paid accommodation. Approximately how much did you spend in total?



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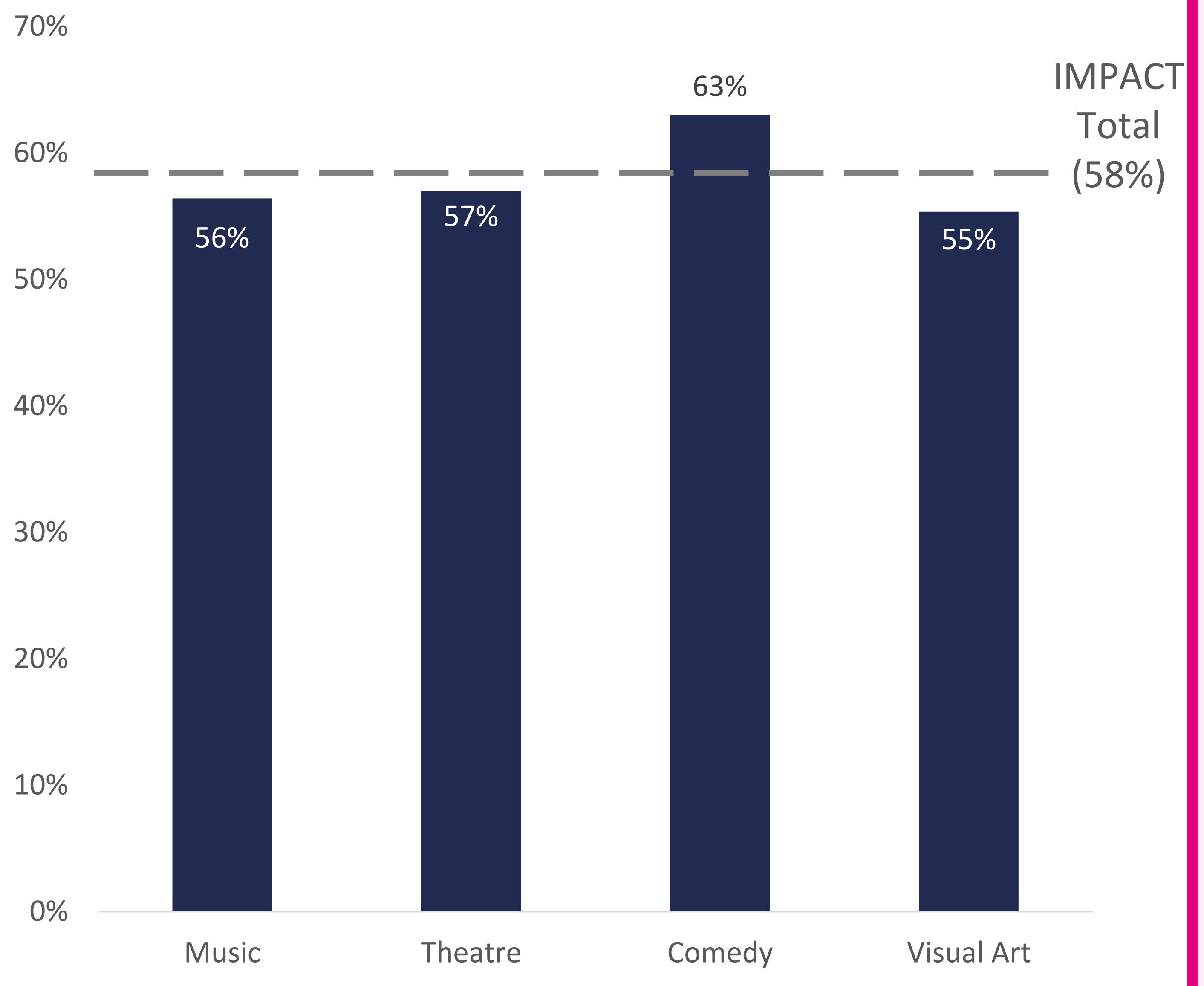
The cost of living affects over half of audiences

The cost of living has a negative impact on 58% of attenders. These people are either spending less on art/culture experiences, cutting back on ancillary spend, or are going to things less often.

Cost of living is most likely to affect comedy audiences and less likely to affect visual art audiences.

Percentage of respondents whose cost of living has a negative impact on their arts and culture behaviours.*



*Respondents gave one of the following responses: I'm spending less on arts/culture experiences, I'm spending less on other things as part of the experience, or the I'm going to arts and cultural experiences less often

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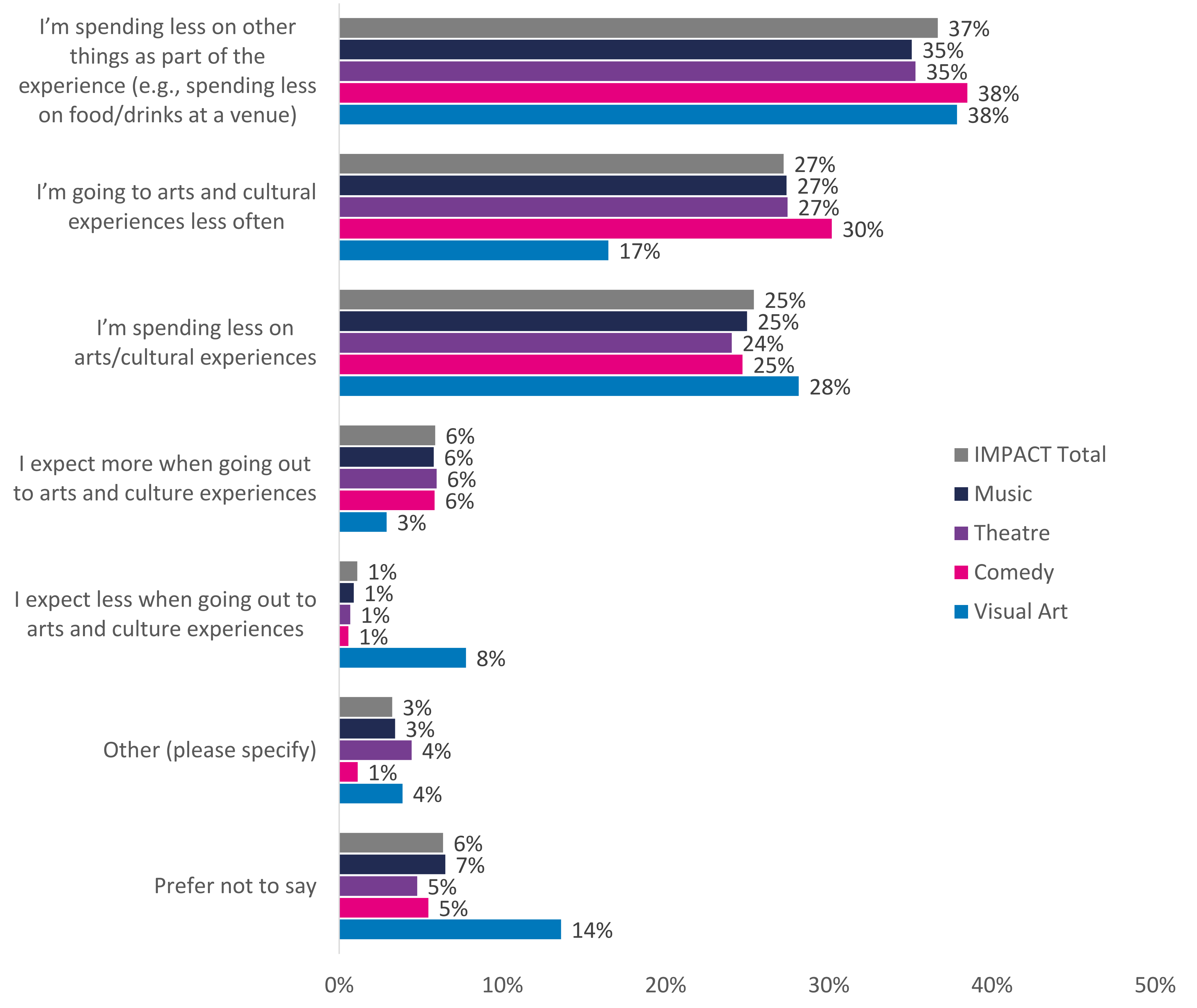
People are going less and spending less

37% of IMPACT respondents are going to arts and culture experiences less often.

Comedy audiences are attending and spending less than others, especially at large venues.

Visual arts attendees aren't attending less but are spending less, with cost of living affecting their habits differently from other artforms.

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



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Section Three

Audience Motivations

Entertainment is a big motivator

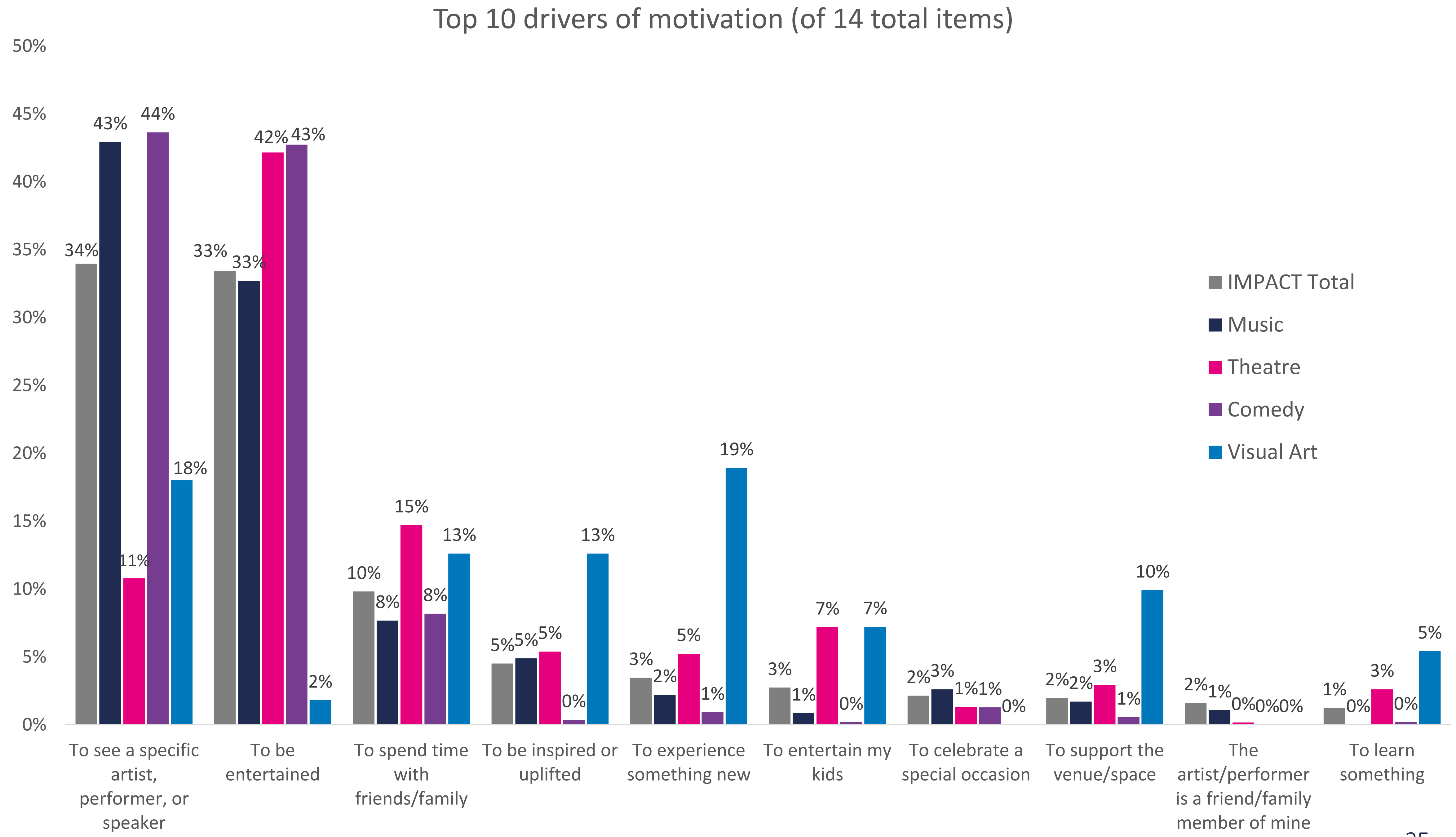
As with most population level research, most audiences said their main reason for visiting was for entertainment or to see a specific performer.

But people attend different artforms for very different reasons.

Visual arts audiences were more likely to want to experience something new or improve their mental health.

People attend theatre to be inspired/uplifted and to experience something new.

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



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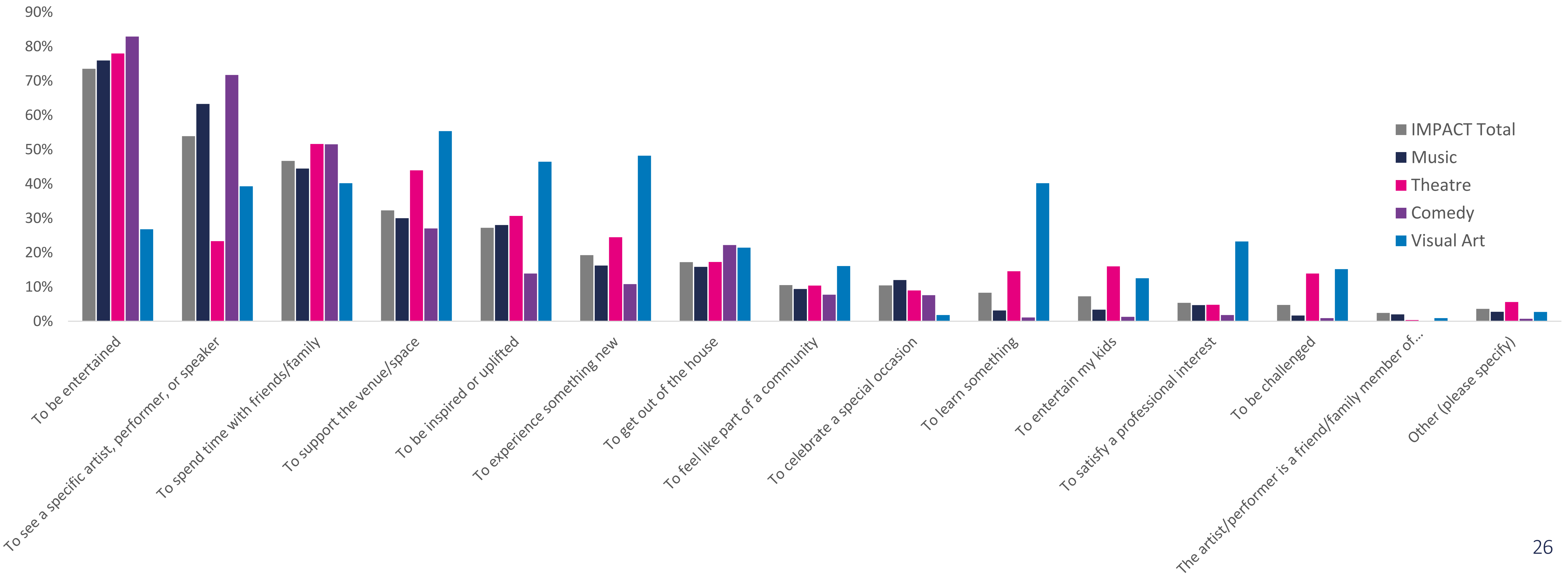
When asked to name all reasons for attending, additional motivations came up

31% went to support the venue and 11% went to feel part of a community, especially visual arts audiences.

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



Section Four

Impact on audiences

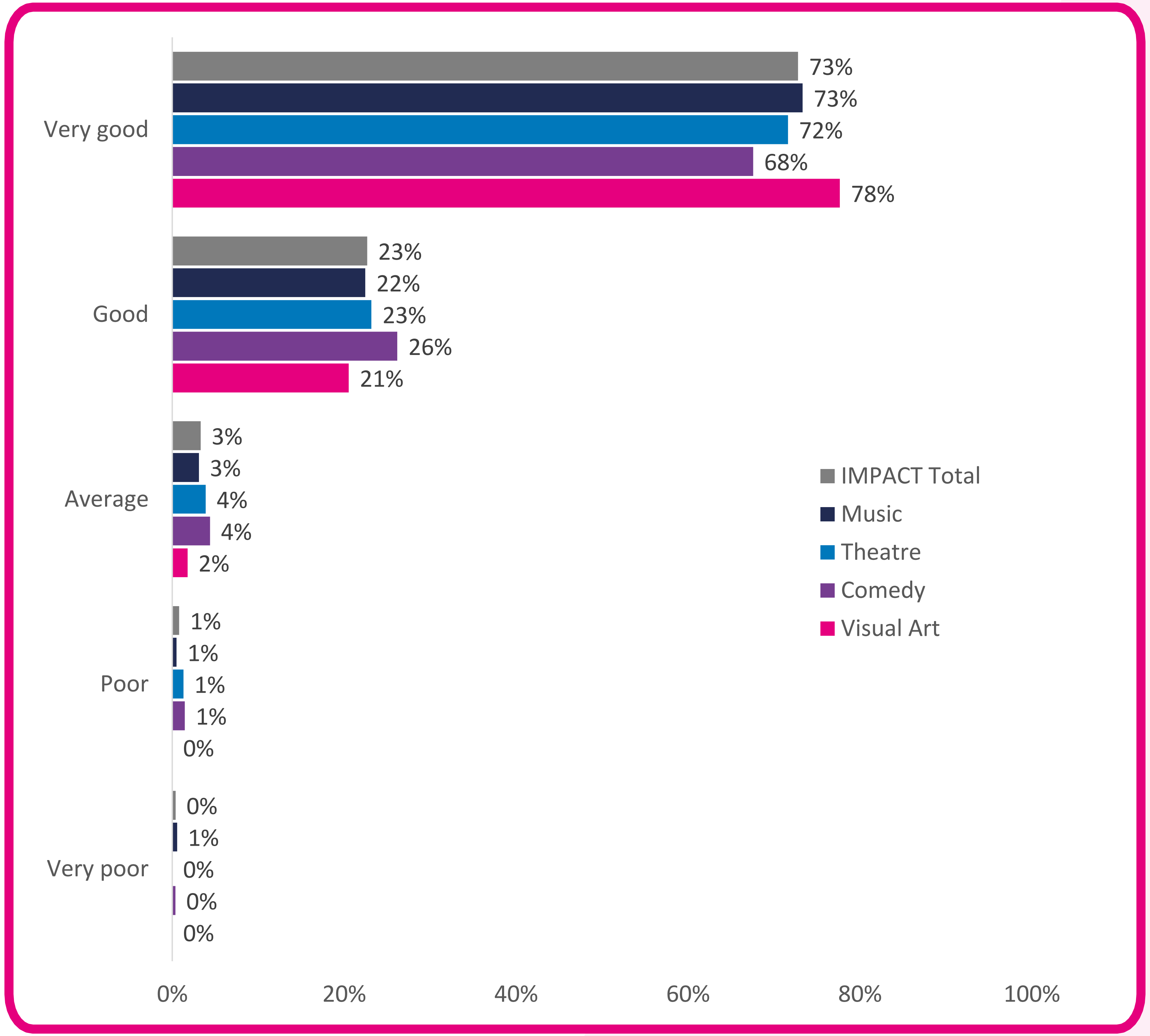
All audiences rated their experiences highly

Satisfaction rates are high, with 96% rating their experience good or very good.

78% of visual arts audiences in particular rated their experience as very good.

Of the four artforms, comedy audiences are less likely to say very good (68%).

What was your overall experience like?



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Engagement creates a lot of emotions

And the vast majority can be interpreted as positive. Visual arts audiences were more likely to feel an improved sense of wellbeing - feeling relaxed and inspired. They also were more likely to report feeling an intellectual impact – feeling more knowledgeable, challenged, curious, transported and empowered.

Theatre audiences were more likely to feel the intellectual benefits of attending – feeling moved, transported, more knowledgeable, challenged, and curious to learn more. They also felt seen/understood.

How did you feel after your visit? Please select all that apply. (Emotions each artform is more likely to experience compared to the IMPACT total)

Music

- Energised

Theatre

- Moved
- More knowledgeable
- Curious to learn more
- Challenged
- Transported
- Seen/understood

- Disappointed
- Sad
- Unmoved
- Uncomfortable
- Angry
- Bored
- Uninterested

Comedy

- Happy

- Disappointed
- Bored
- Uninterested

Visual Art

- Relaxed
- Inspired
- Safe/comfortable
- More knowledgeable
- Connected
- Curious to learn more
- Challenged
- Transported
- Empowered
- Seen/understood

- Unmoved
- Uninterested

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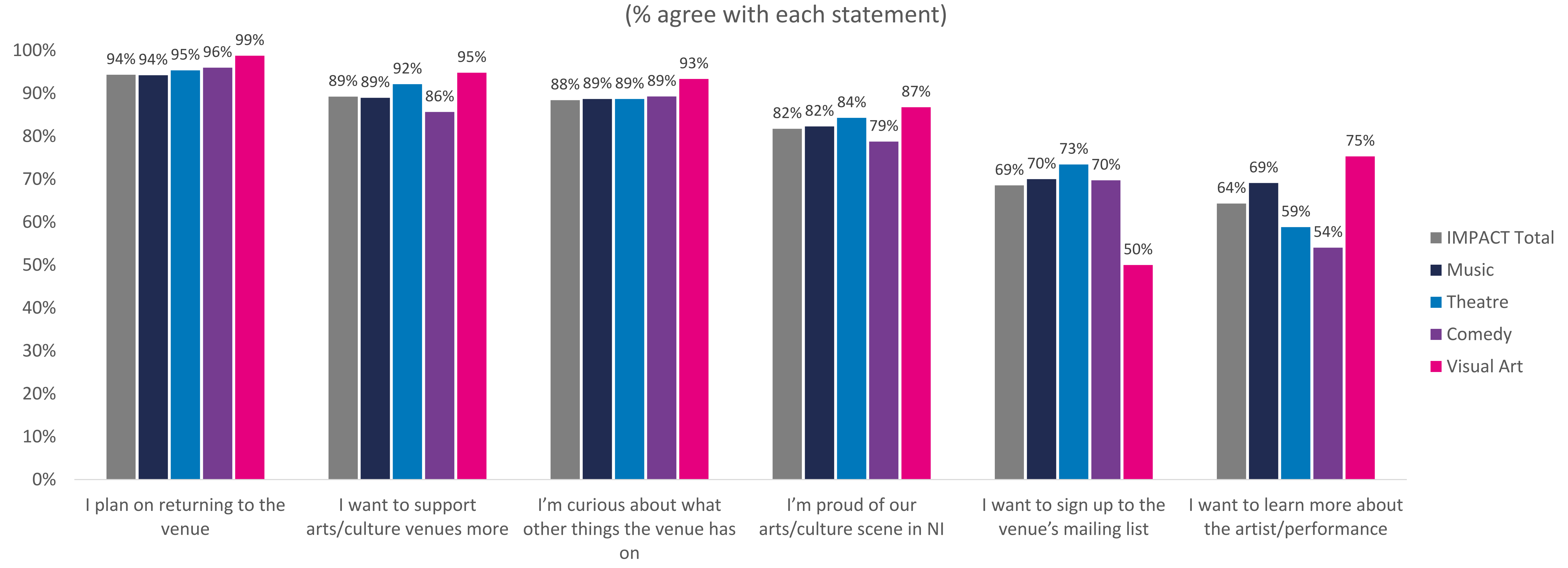
All artform audiences report feelings of pride and support for the sector

Visual arts attenders in particular gave the highest ratings across 5 of the 6 statements; they want to learn more about the artist after their visit and are most likely to already be signed up to email newsletters.

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



Be part of our research

IMPACT is a sector-wide long-term multi-year research programme. Thrive are committed to continuing this research for the next three years; increasing the size of the data set, helping organisations understand their results and highlighting sectoral development issues for stakeholders.

- If you already participate in the IMPACT survey, you can compare your data live at any time (via your organisation's bespoke reporting link). This will help you to see if your audiences behave in a different way than others, as well as see specific feedback about your organisation. You can also avail of a free advice session to review your data and help you think of strategic actions to move your organisation forward.
- If you don't currently participate in IMPACT but want to learn more about your audiences' motivations, behaviours and impact, it's easy (and free) to get started. Just get in touch and we will arrange to meet you at your organisation and help you determine the best and easiest way to send the survey out to your audiences. With IMPACT, we do the legwork for you – we provide you with all the materials you need, including marketing copy, bespoke posters/flyers, and a cheat sheet you can hand to your staff/volunteers so everyone is on the same page.

Anyone can access the results of IMPACT research (including the raw data, snapshots, bespoke artform reports, or the overall 23-24 report) at wewillthrive.co.uk.

The IMPACT Survey is supported by the Arts Council of Northern Ireland.

Participating organisations

Ardhowen Theatre
Belfast Exposed
Belfast International Arts Festival
The Black Box
Burnavon
Catalyst Arts
Circusful
Down Arts Centre
The Duncairn
F.E. McWilliam Gallery
High Points Youth Ballet
Imagine! Belfast
ISLAND Arts Centre
The Lyric Theatre
Market Place Armagh
Naughton Gallery
NI Science Festival
Oh Yeah Music Centre
Open House Festival
Peter Corry Productions
The Playhouse
The Portico of Ards
SSE Arena
Strule Arts Centre
The MAC
Vault Artist Studios
Waterfront Hall
Young At Art

Thank You

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Crescent Arts Centre, 2-4 University Road, Belfast BT7 1NH
+44 (0) 28 9043 6480
wewillthrive.co.uk

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