

IMPACT:

Impact Measurement of People
Attending Culture Today

THEATRE REPORT

September 2024



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 find out about how artform affects audience motivations, behaviours, and demographics.

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 list 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 have been collected from September 2023 to July 2024.

Participating organisations include:

Ardhowen Theatre, Belfast Exposed, Belfast International Arts Festival, The Black Box, Burnavon, Catalyst Arts, Circusful, Down Arts Centre, The Duncairn, FE McWilliam Gallery, High Points Youth Ballet, Imagine! Belfast, ISLAND Arts Centre, The Lyric Theatre, Market Place Armagh, Millenium Forum, 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, Waterfront and Young at Art.

There were 737 survey responses collected from theatre attenders.

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Summary

Theatre audiences' demographics were slightly different compared to the IMPACT total

- Theatre audiences were more likely to be aged 60+.
- They were also less likely to be disabled and less likely to identify as LGBTQI+.

Theatre audiences behave very differently compared to other artforms

- Theatre had the lowest percentage of new audiences (6%).
- Audiences tended to have shorter journey times, with 22% travelling 15 minutes or less to get to the venue (vs. 19% of the IMPACT total).
- They **don't book too far in advance** – 42% book within a month of the performance date compared to 29% of the IMPACT total.
- **Print is an important channel**, with theatre audiences more than three times as likely to have heard about the event through a printed brochure or poster/flyer.

Summary

Theatre is a social experience

- The two main drivers of motivation for attending theatre are for **entertainment** and to **spend time with friends and family**.
- Only 10% of theatre audiences go alone, which is similar to the IMPACT total. Theatre audiences, however, are more likely to attend with extended family members (25% vs. 22% of the IMPACT total) and younger children aged 11 and under (15% vs. 7% of the total).
- As part of the experience, theatre audiences are more likely to **get food/drinks at the venue itself** (61% vs. 56% of the total). The only other artform with higher figures was comedy, with 63% getting food/drinks at the venue. While roughly a third (36%) of theatre audiences do get food/drinks in the local area, this is slightly lower than the IMPACT total of 41%.
- Theatre respondents spent £45 on average during their visit (e.g. on food/drink/accommodation). Other artforms (comedy and music) have higher spend figures on average.
- Cost of living is less likely to affect theatre attenders – they were slightly less likely to say they're cutting back on event and ancillary spend compared to the IMPACT total.

Summary

Mental wellbeing and learning motivations were more important to theatre audiences

- When asked to name all of the reasons why they attend theatre, people were more likely to go to be inspired/uplifted, experience something new, learn something and be challenged compared to the IMPACT total. They were also more likely to go to entertain their children, which makes sense as this group is more likely to attend with younger kids.
- After attending, theatre audiences reported feeling these benefits and then some – they were more likely to say they felt moved, transported, more knowledgeable, challenged, and curious to learn more.
- Compared to the total, theatre audiences were more likely to select other words, including sad, uncomfortable, and angry. These aren't necessarily negatives – it just shows that **theatre has the power to elicit a wide range of emotions** from an audience.

Theatre respondents were more likely to report feelings of pride and support for the sector

- These audiences were more likely to agree that they are proud of our arts/culture scene in NI (84% vs. 82% of the IMPACT total) and more likely to say they want to support the arts/culture sector more (92% vs. 89% of the total).



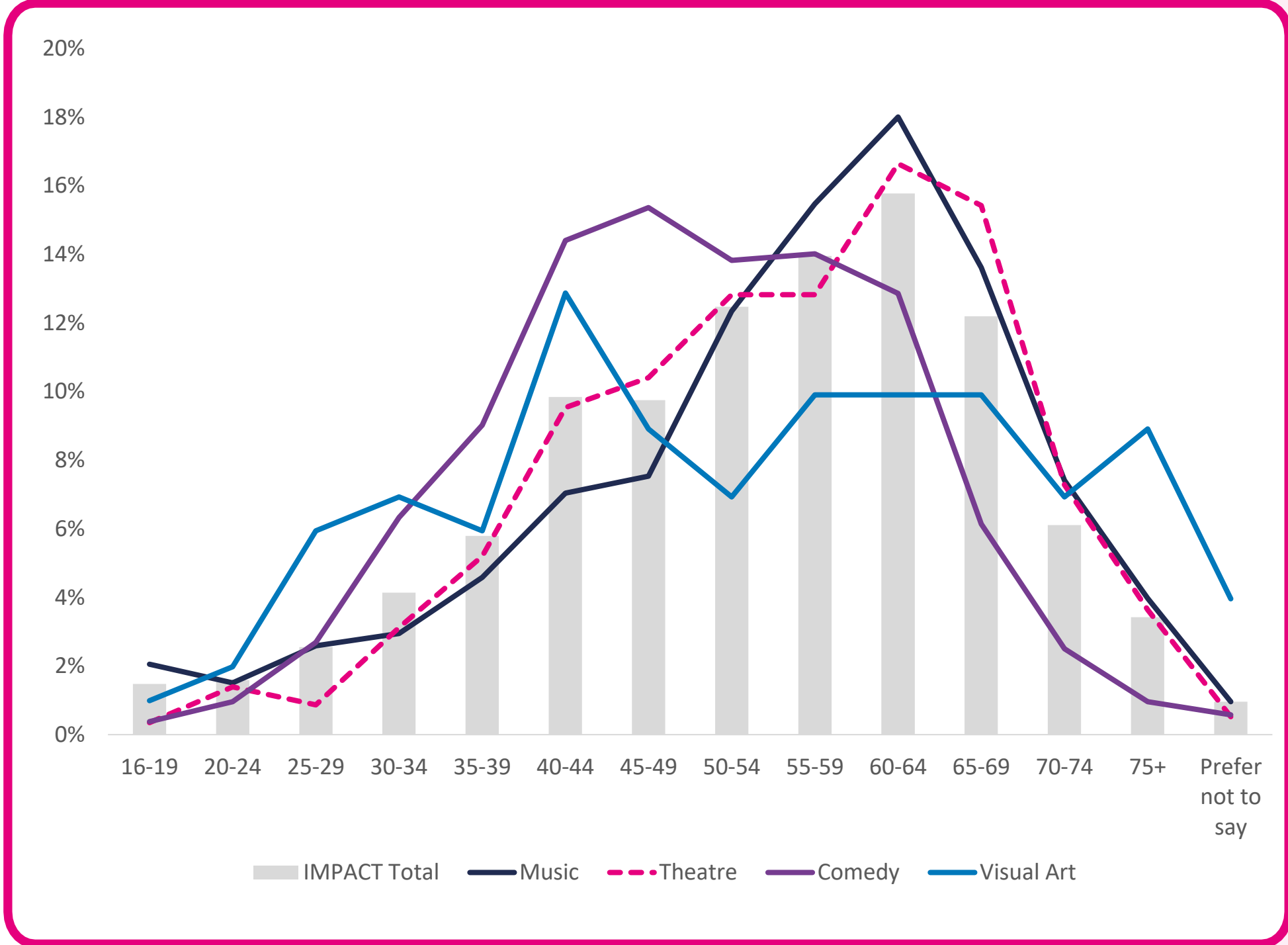
Section One

Audience profile

Theatre audiences are generally older

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

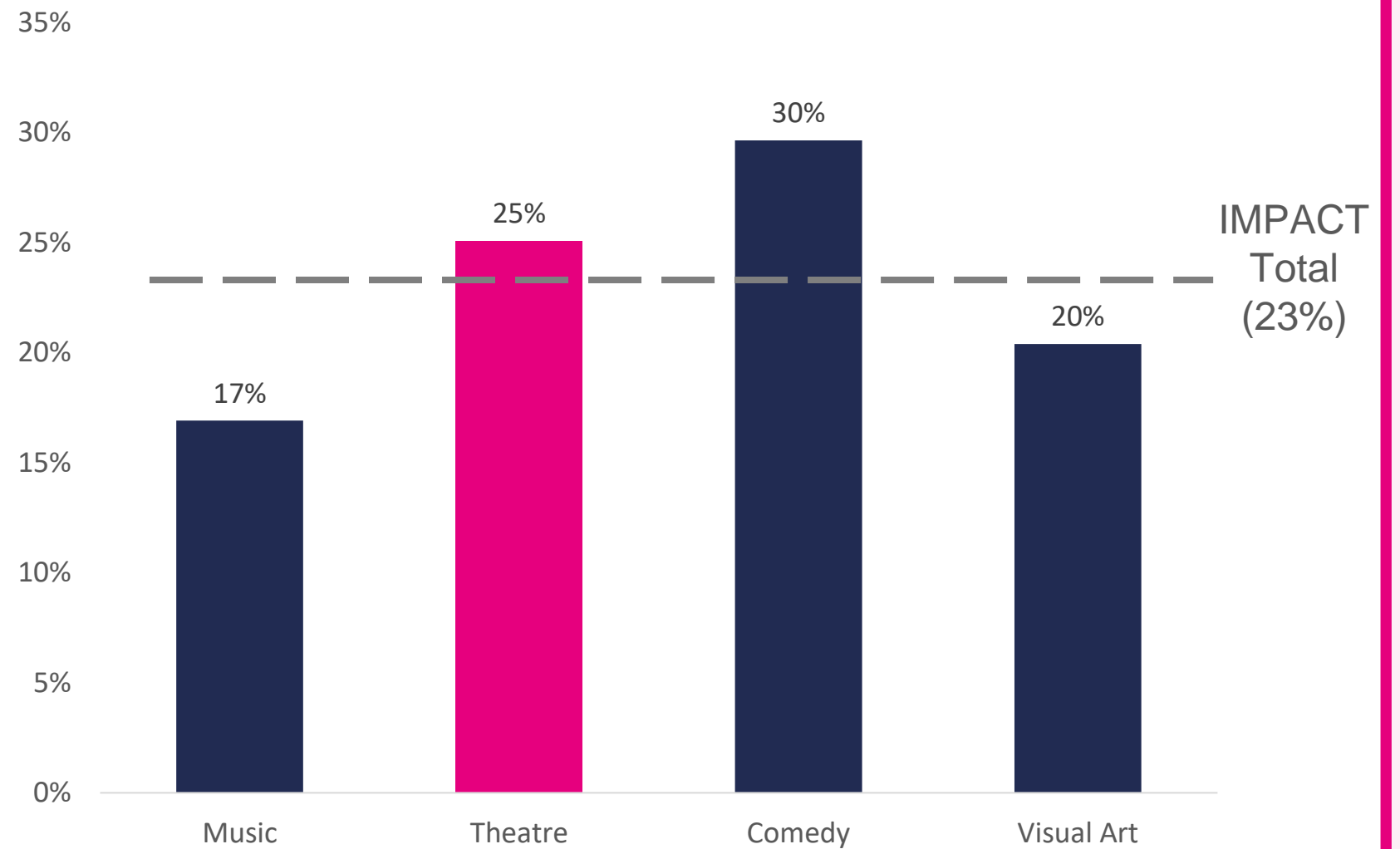
How old are you?



Presence of children in the household is high

A quarter of theatre respondents had children living in the household, which is higher than the IMPACT total but not as high as those attending comedy events. This is potentially due to age of attendees – comedy audiences were more likely to be aged 30-49.

Do you have children under 16 living with you?

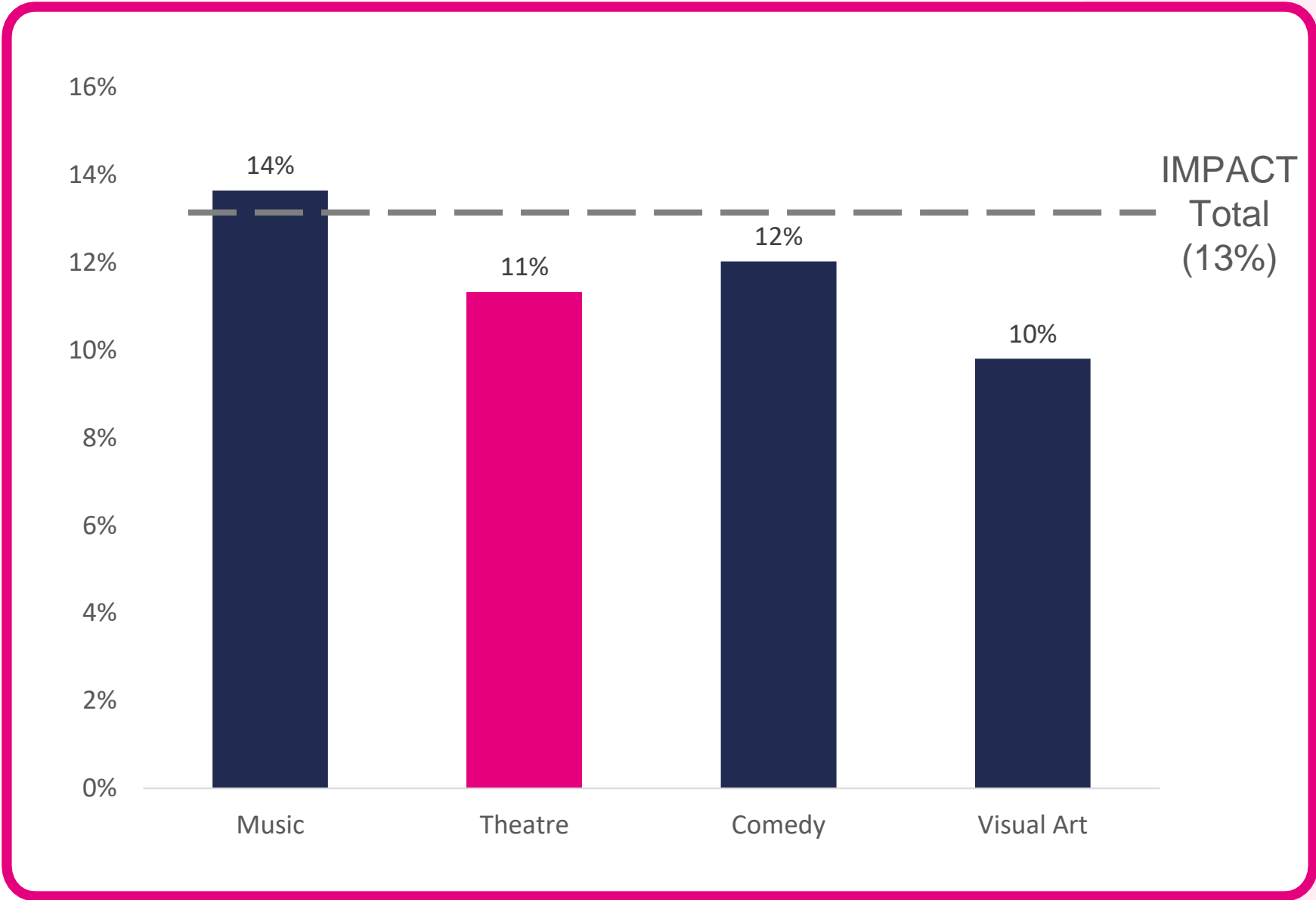


Just over 1 in 10 theatre respondents are disabled

This is slightly lower than the IMPACT total of 13%.

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?




Theatre audiences are more likely to report being straight/heterosexual

Just 5% of theatre audiences identify as LGBTQI+.

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

TICKETS



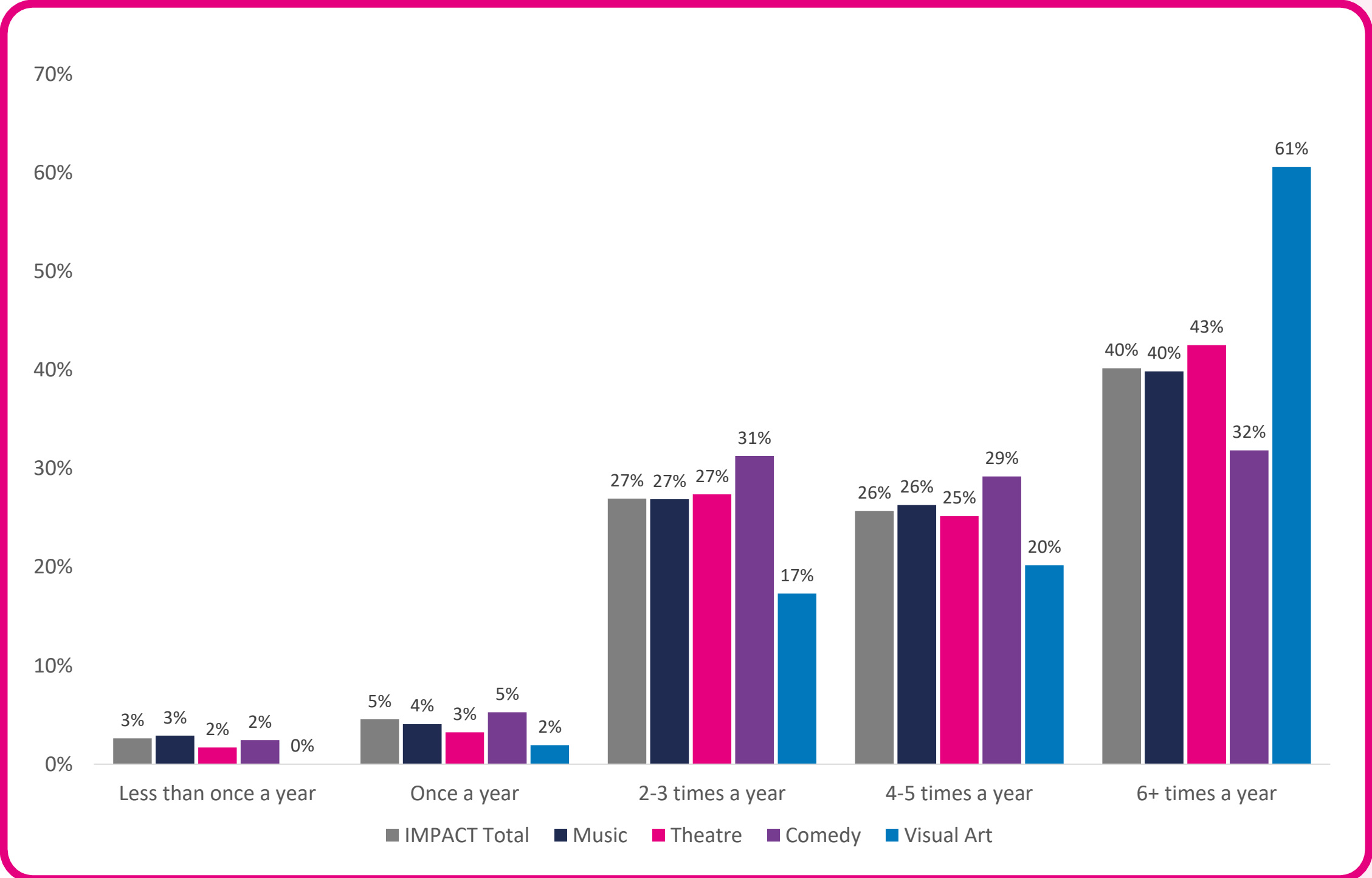
Section Two

Audience Behaviour

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

Theatre audiences resemble the IMPACT total in terms of engagement

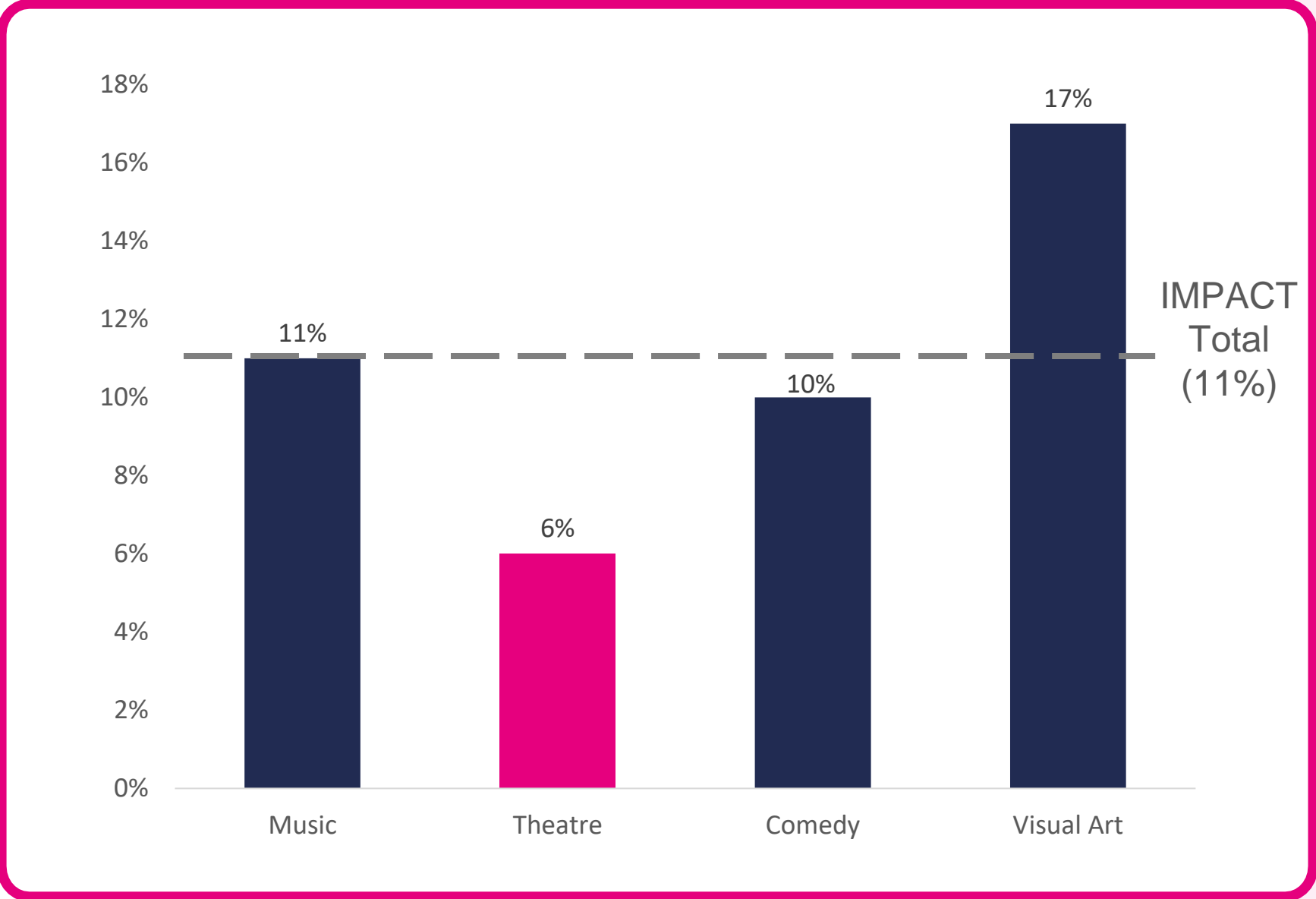
43% of theatre audiences engage in arts and culture 6+ times a year, and closely mirror the same pattern as the IMPACT total.



Theatre had the lowest percentage of new audiences

Just 6% of audiences were new to the theatre.

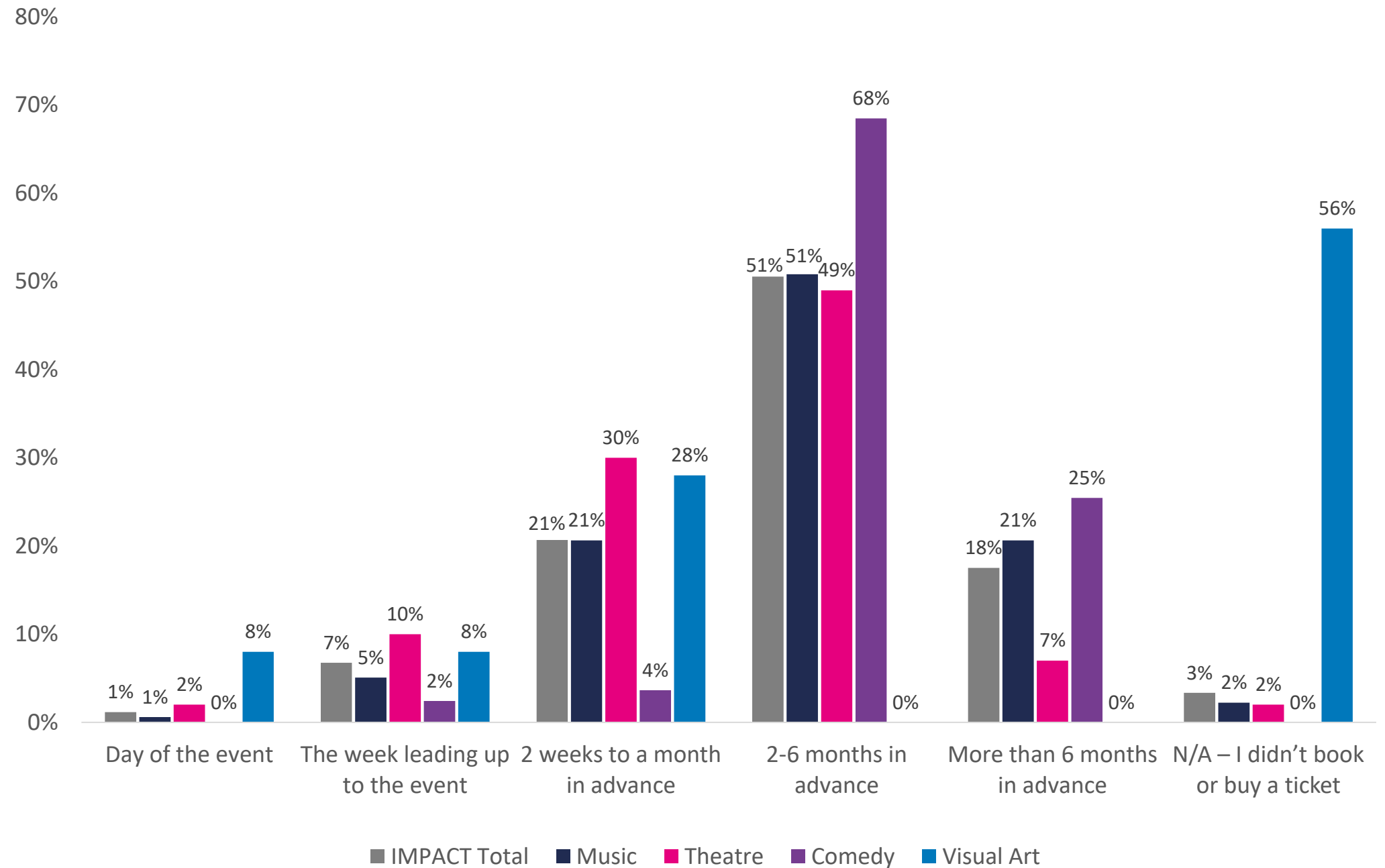
Is this your first time visiting this building/space?
(% Yes)



42% of theatre audiences booked within a month of the performance date

This is much higher than the IMPACT total of 29%. In contrast, comedy attenders were more likely to book at least two months in advance.

When did you book your ticket? Please select one.




Theatre audiences tended to be local to the venue

22% of theatre audiences travelled 15 minutes or less to get to the venue. The only other artform with such close audiences was visual arts.

Approximately how long did your journey take?

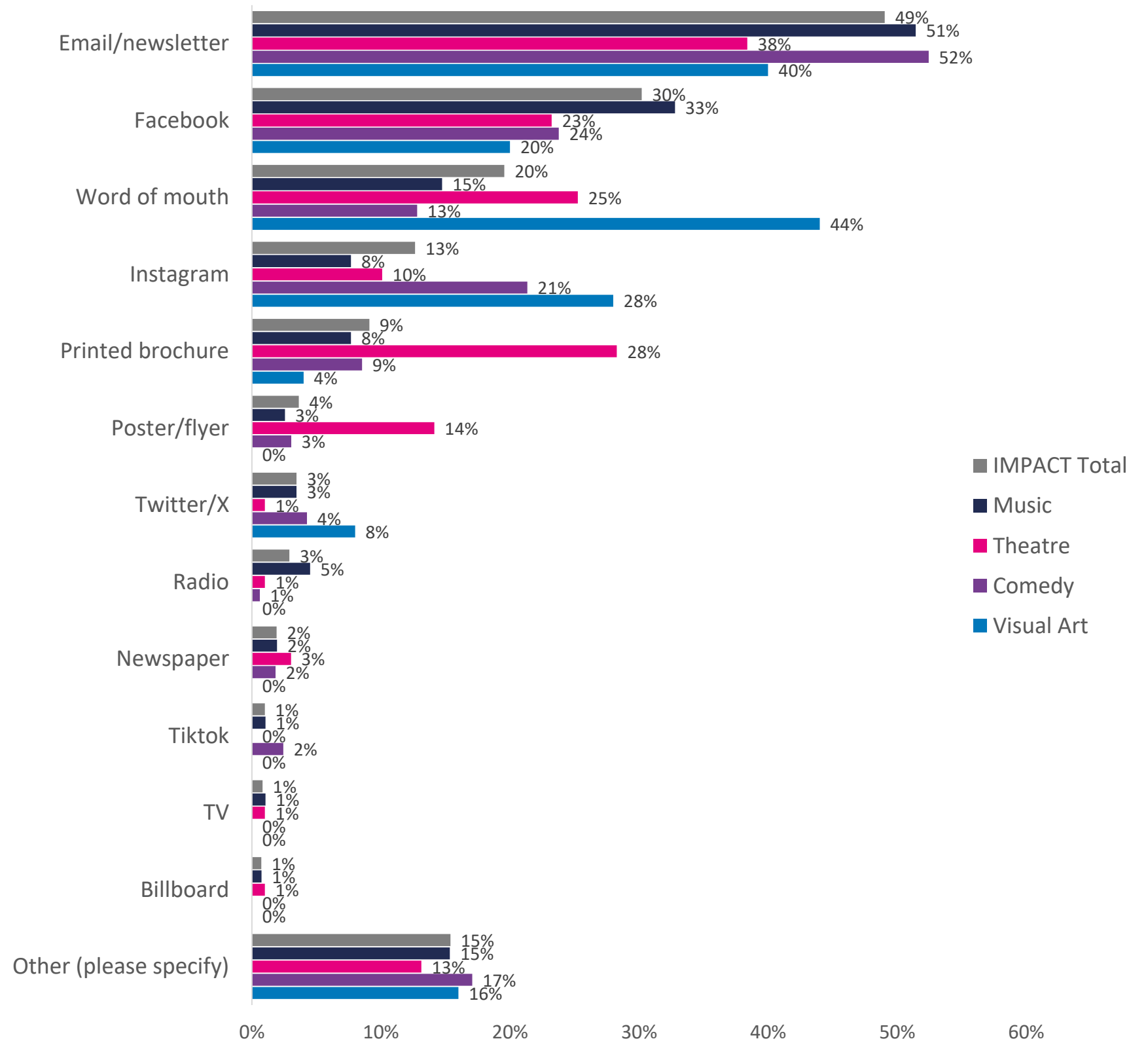
	IMPACT Total	Music	Theatre	Comedy	Visual Art
Less than 15 minutes	19%	18%	22%	19%	27%
15-30 minutes	35%	34%	36%	35%	33%
30-45 minutes	23%	23%	19%	28%	21%
45-60 minutes	14%	14%	13%	12%	10%
Over an hour	9%	11%	9%	6%	9%

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

For theatre audiences, print isn't dead

Theatre audiences were less likely to have heard about the event/space via email, but were more than three times as likely to hear about it through a printed brochure or poster/flyer. 25% of theatre audiences also cited word of mouth, which is second highest among the four artforms.

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




Theatre, like other artforms, is a very social outing

Most who attend with others go with a spouse/partner, friends, or other family members. Theatre audiences are also more likely to attend with younger children or with an organised group.

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

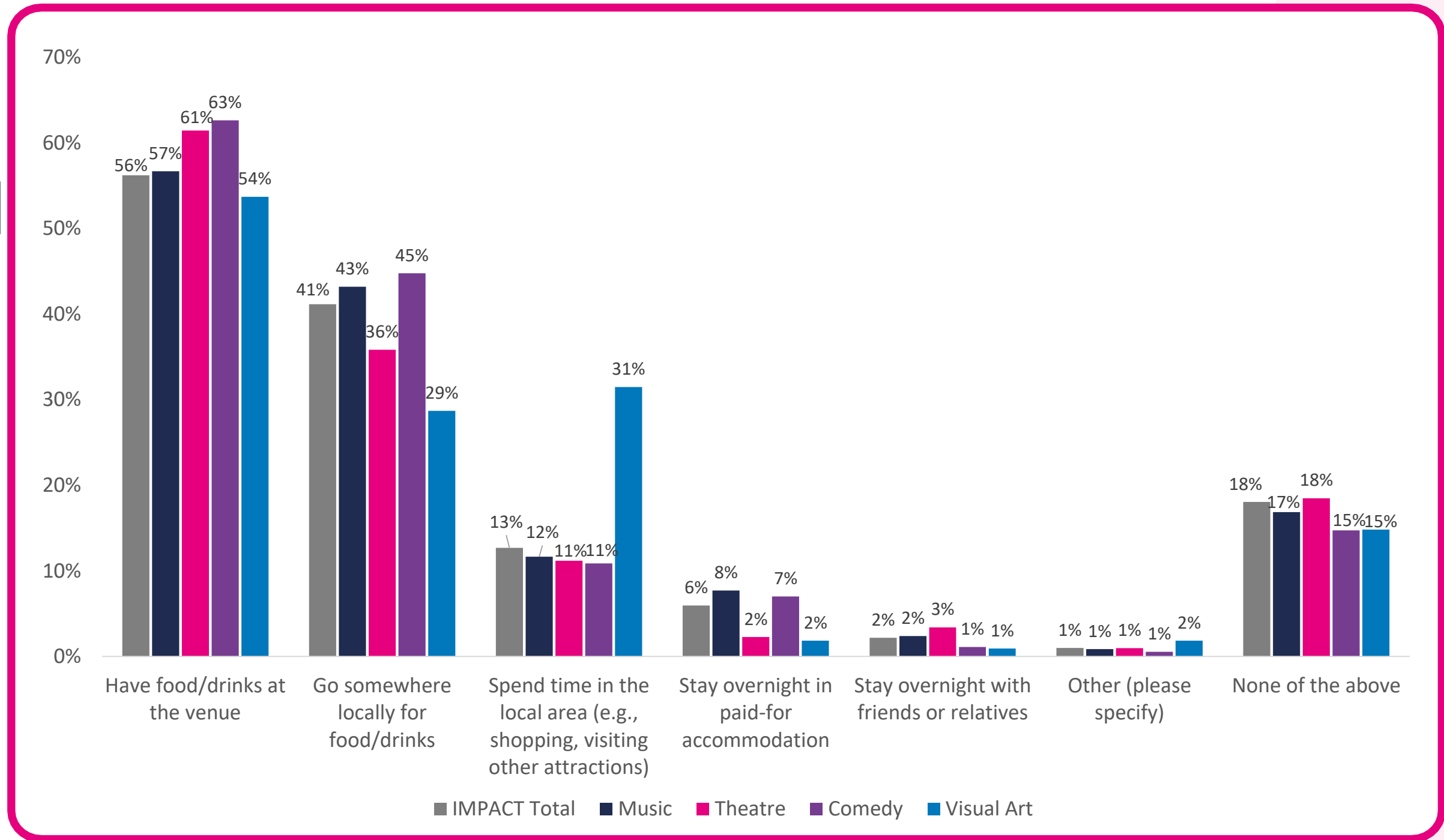
	IMPACT Total	Music	Theatre	Comedy	Visual Art
I came alone	10%	9%	10%	3%	36%
I came with my spouse/partner	49%	52%	40%	64%	21%
I came with friends/colleagues	25%	26%	26%	26%	26%
I came with other family members (e.g., parents, siblings, cousins, or extended family)	22%	21%	25%	17%	10%
I came with children 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

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

6 in 10 theatre attenders had food/drinks at the venue

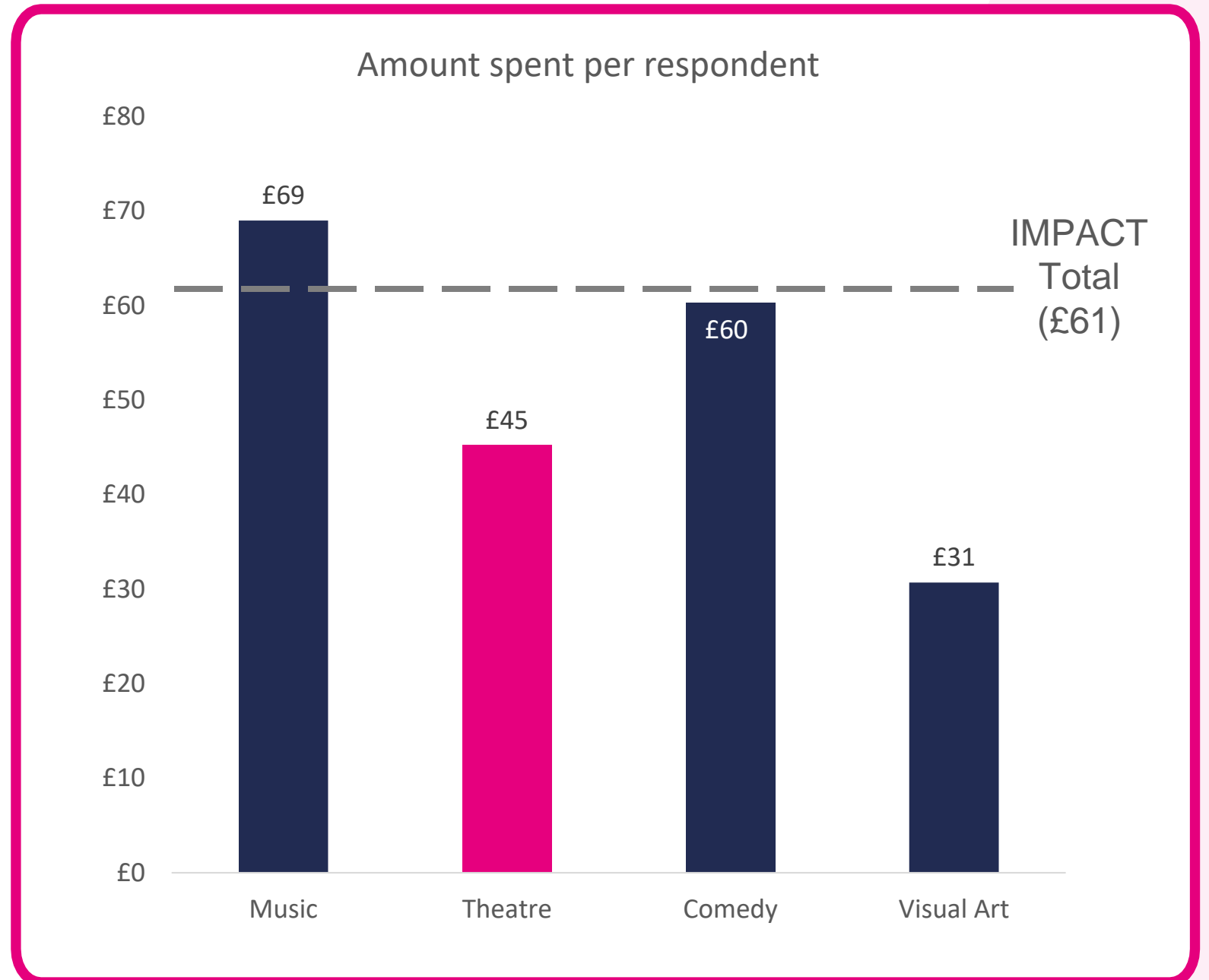
This was higher compared to the IMPACT total of 56%, but not as high as comedy (at 63%).



On average, theatre-goers spent £45 during their visit

That adds up to £3,256 among theatre attenders who gave a response to the question.

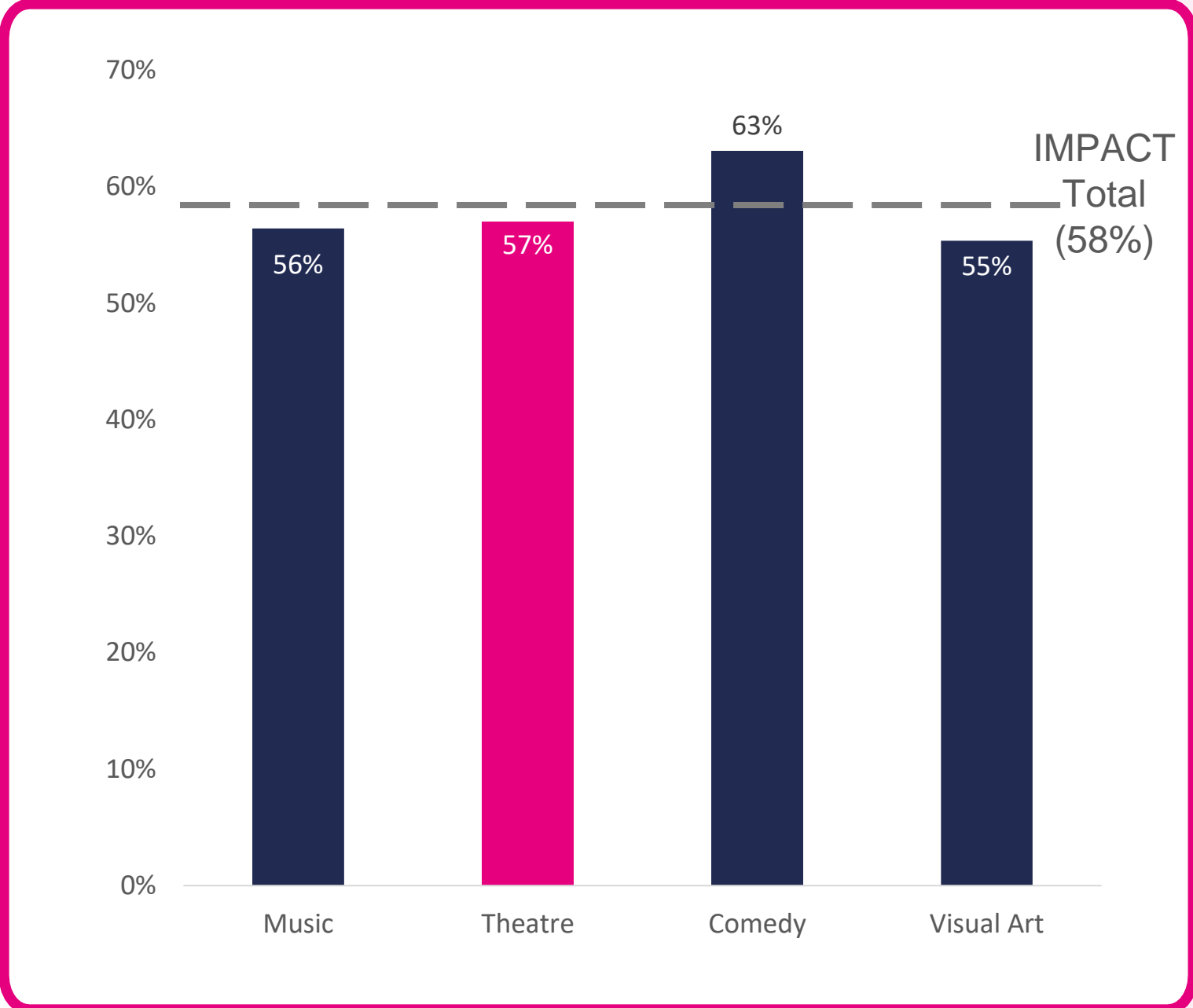
You mentioned you spent money on food/drinks (either at the venue or somewhere locally), spent time in the local area, or stayed overnight in paid accommodation. Approximately how much did you spend in total?



The cost of living affects over half of audiences from all artforms

The cost of living has a negative impact on 57% of theatre attenders. These people are either spending less on art/culture experiences, cutting back on ancillary spend, or are going to things less often. This figure is slightly lower than the IMPACT total.

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

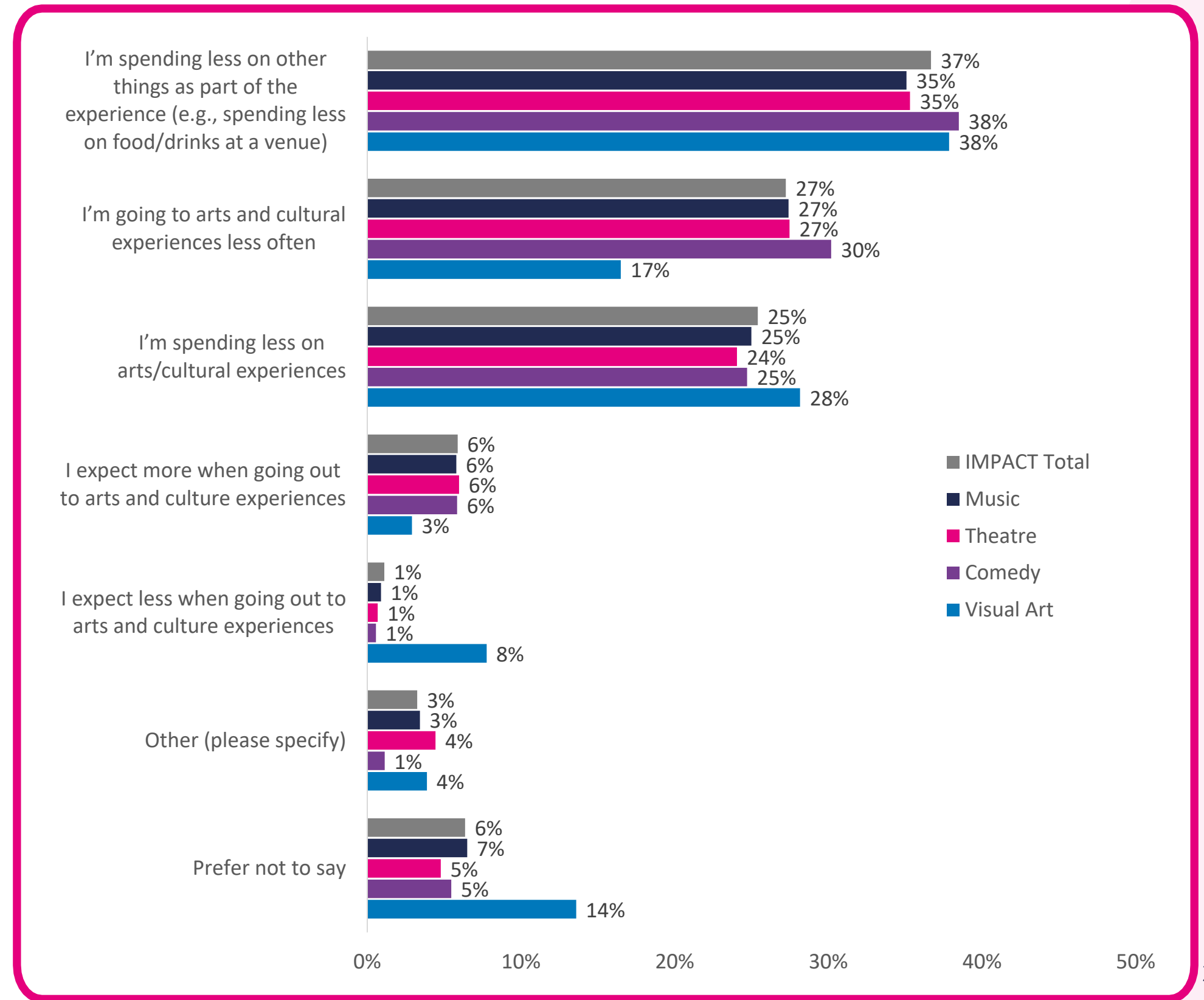


*Respondents gave one of the following responses: I'm spending less on arts/culture experiences, I'm spending less on other things as part of the experience, or the I'm going to arts and cultural experiences less often

Theatre attenders are less likely to be cutting back on ancillary or total spend

35% of theatre audiences are cutting back on ancillary spend (vs. 37% of the IMPACT total), and 24% are spending less on the experiences themselves (vs. 25% of the total).

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





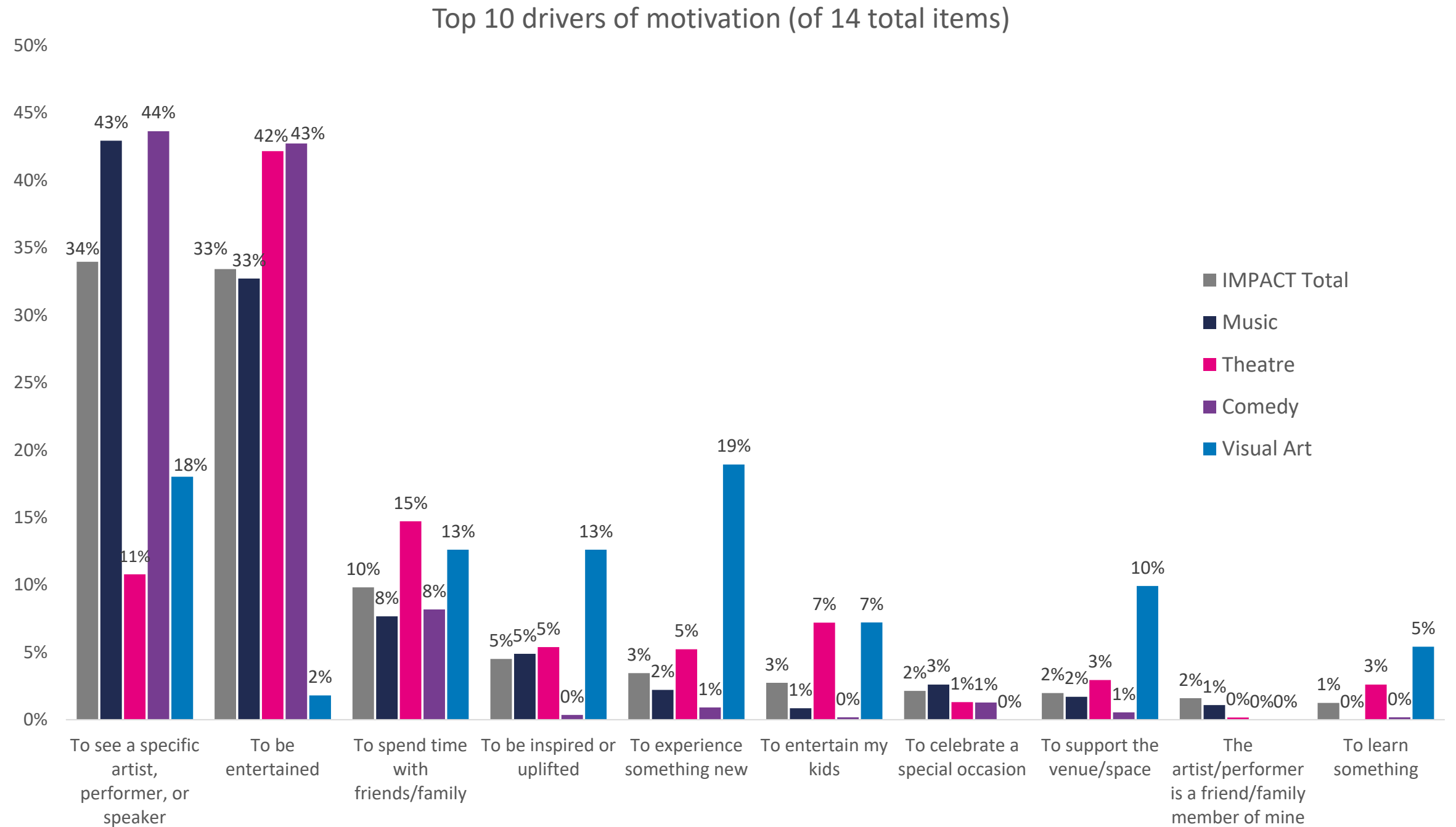
Section Three

Audience Motivations

Entertainment is the biggest driver of motivation for theatre-goers

42% of theatre attenders said their main reason was for entertainment purposes (vs. 33% of IMPACT total), and 15% said it was to spend time with friends and family (vs. 10% of the total).

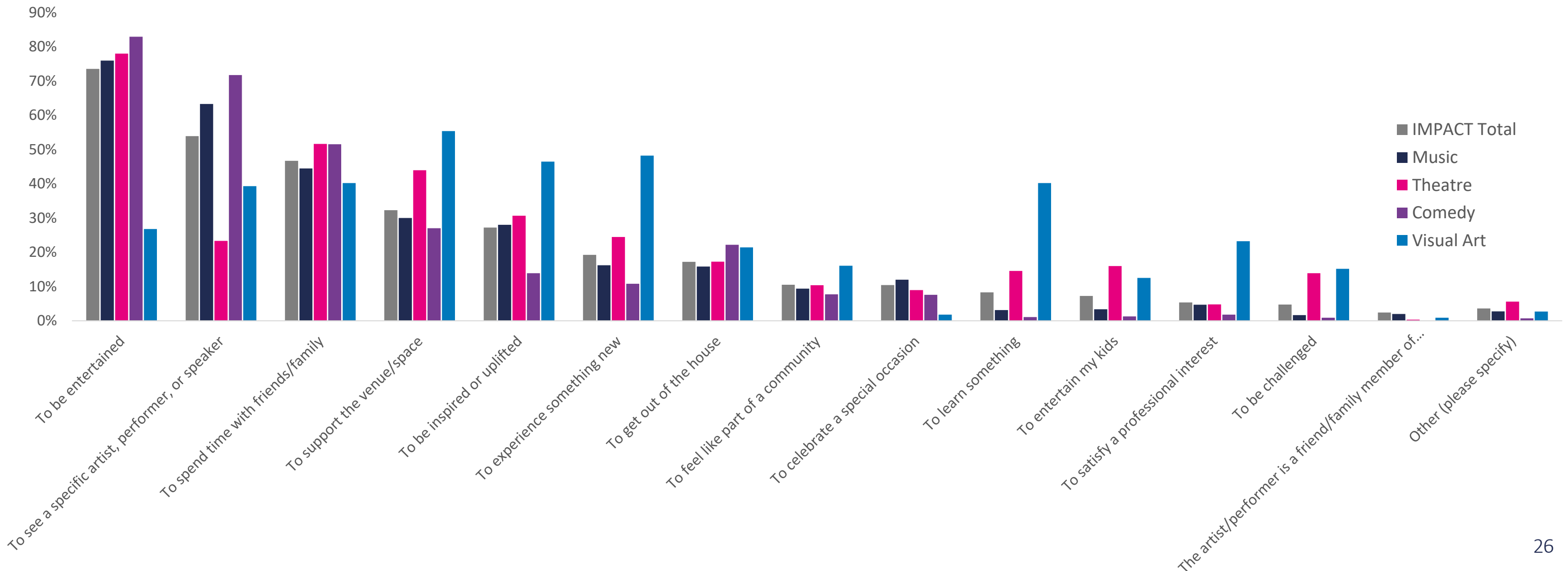
Which of the following is the main reason for your visit? Please select one.



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

Theatre-goers were more likely to attend to be inspired/uplifted, experience something new, to learn something, be challenged or entertain their kids compared to the IMPACT total.

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



A photograph of a man and a woman in profile, smiling and clapping. The man in the foreground is wearing a plaid shirt and sunglasses. The woman behind him is also smiling. The background is dark with some bokeh lights. A large pink circle is overlaid on the right side of the image, containing the text.

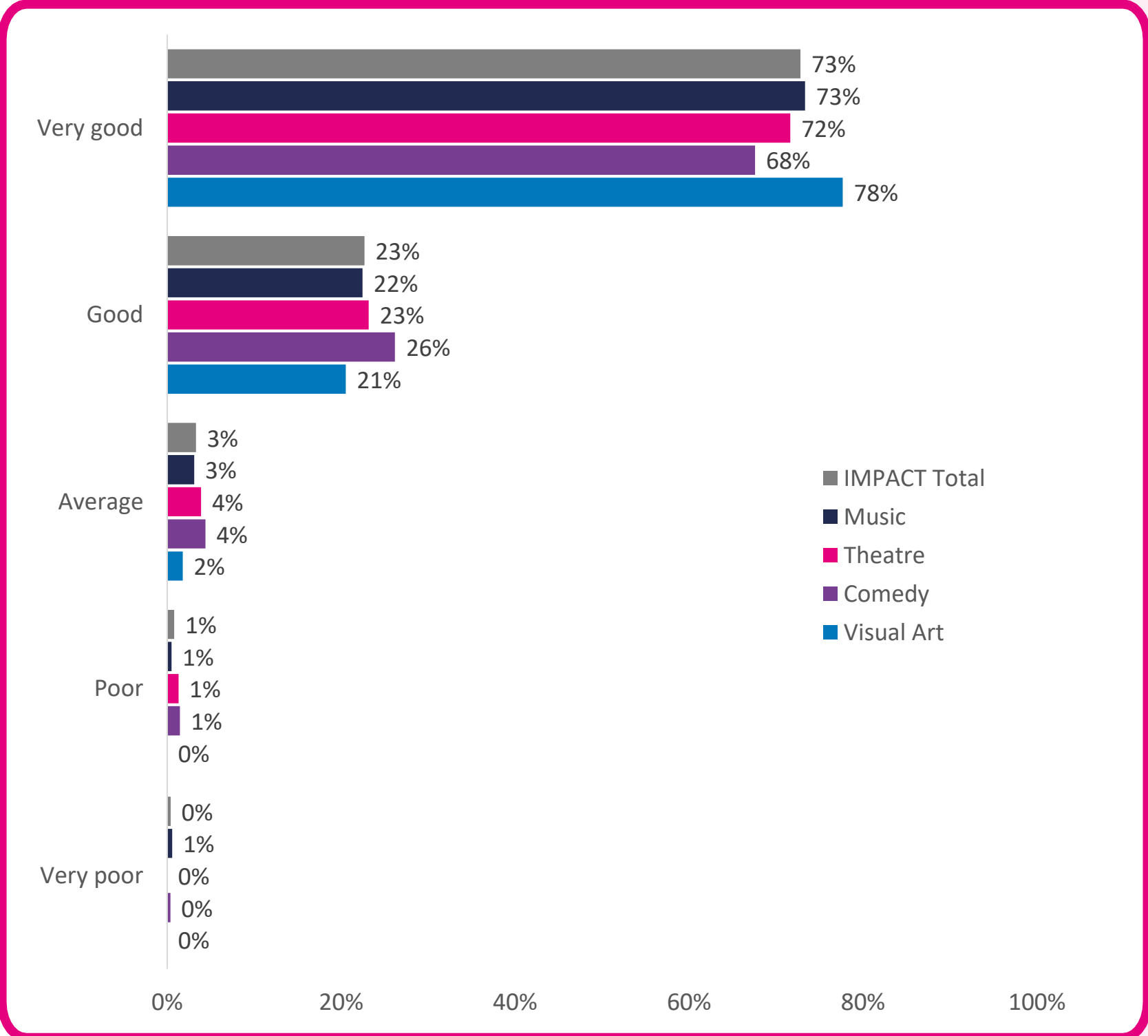
Section Four

Impact on audiences

All artforms rated their overall experience highly

72% of theatre audiences rated their experience as very good, just shy of the IMPACT total of 73%.

What was your overall experience like?



Theatre elicits more emotions from audiences compared to the total average

Compared to the IMPACT total, 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, which is lovely because it's showing that theatres are really connecting with their audiences.

Theatre audiences however were more likely to also report they felt disappointed, bored, uninterested or unmoved after attending. Theatre-goers also reported feeling sad, uncomfortable and angry – while these are seemingly negative words, it's not a bad thing that audiences are feeling this way. It simply shows that theatre has the power to elicit a wide range of emotions from the audience.

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

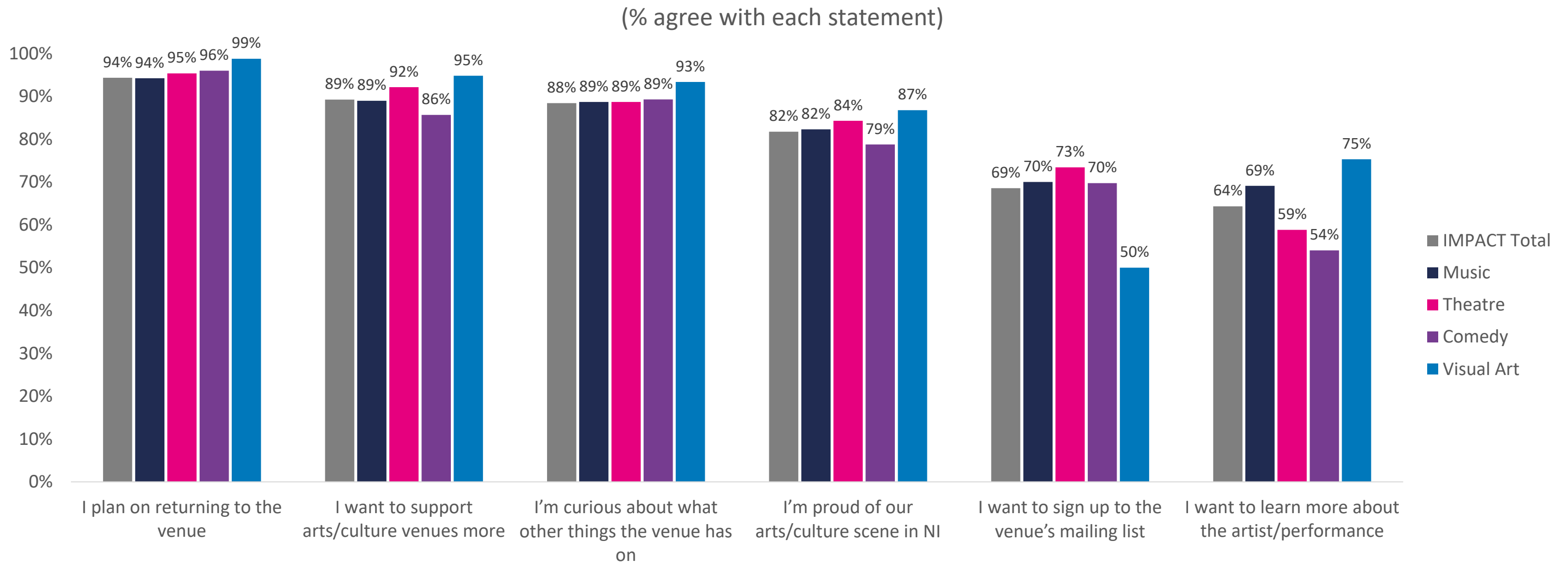
- Relaxed
- Inspired
- Safe/comfortable
- More knowledgeable
- Connected
- Curious to learn more
- Challenged
- Transported
- Empowered
- Seen/understood

-
- Unmoved
 - Uninterested

Theatre attenders were more likely to report feelings of pride and support for the sector

84% of theatre-goers agreed that they are proud of our arts/culture scene in NI (vs. 82% of IMPACT total) and 92% agreed that they want to support arts/culture venues more (vs. 89% of the total). 73% also agreed that they wanted to sign up to the venue's mailing list (vs. 69% of the total).

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





Section Five

Recommendations

Recommendations

People say print is dead... but not for theatre audiences

- Theatre audiences were more than three times as likely to have heard about the event through a printed brochure or via a poster/flyer. This is good, as it suggests audiences are paying attention to what you send them. But do you track it? With dwindling budgets and a lot of organisations going green, it's more important than ever to be smart about print. There are several ways you can do this – you can include different promotion codes on season brochures you send via the post vs. those on posters or flyers. Or, you could add a question during the online checkout process that asks people how they heard about the event (and have box office staff ask people who are booking on the phone). That way, you can track which marketing channel has better return on investment.

Encourage early bookings

- 42% of theatre audiences book in the month leading up to the performance, compared to 29% of the IMPACT total. Piggybacking on the recommendation above, you can offer larger discounts if people book well in advance of the event, and smaller discounts closer to the performance date. Or, you can offer a different incentive – first X number of people to book will get a free drink on arrival. Go with whatever incentive your audience would value.

Take advantage of your box office system

- Just 6% of audiences were new to the theatre, so you have a lot of returning audiences coming through your doors. Reward your most frequent attenders – most box office systems have a tagging system you can set up to highlight frequent attenders so staff know to thank them for their support when booking in person or over the phone. Or, you can go through your box office system a few times a year and manually identify your most frequent bookers, and send them a personalised email with a drink offer or invite to a special event. Show your audiences that you love them as much as they love you.

Recommendations

Encourage people to get food/drinks at the venue

- 61% of theatre audiences get food/drinks at the venue, which is higher than the IMPACT total of 56%. There is still wiggle room to get that figure higher. With audiences enjoying the theatre as an entertaining and social night out, make the most of it. You can send audiences pre-event emails with links to your food/drinks menu to whet their appetite, or a link for people to pre-book a drink for convenience.
- Theatre audiences are less likely to be cutting back on ancillary spend due to the cost of living, so don't feel pressured to offer a discount on food or drinks. Instead, focus on giving them the information they need ahead of time so they can plan to get food/drinks at the venue, and promote the convenience aspect of it.

Theatre has the power to elicit a wide range of emotions – don't be afraid to showcase this to audiences

- Theatre audiences were more likely to report feeling many intellectual benefits of attending – feeling moved, transported, more knowledgeable, and curious to learn more. They are also more likely than other artforms to feel sad, uncomfortable and angry. These aren't negative words, but instead illustrate the power of theatre.
- You can post short videos on social, capturing what people feel when they get out of the theatre, and use this to promote WHY people should see the performance.

Recommendations

Harness the love your audiences have for theatre

- Compared to the IMPACT total, theatre audiences were more likely to say they are proud of our arts/culture scene in NI and that they want to support arts/culture venues more. Theatre audiences are also more likely to want sign up to the venue's mailing list. Are you taking full advantage of this? Ask audiences to sign up to your mailing list but offer an incentive – e.g. they can be the first to know about or book shows before tickets are released to the general public.

Get to know your audiences better

- If you already participate in the sector-wide IMPACT survey, you can compare your data (via your organisation's bespoke reporting link) to the artform reports, or to the [total report](#) released earlier this year. 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 one-hour Audience Appointment with our Sector Programme Coordinator Eve to review your data and think of strategic and tactical actions you can take 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 send [Eve an email](#) and she 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.

Thank You



wewillthrive

Crescent Arts Centre, 2-4 University Road, Belfast BT7 1NH

+44 (0) 28 9043 6480

wewillthrive.co.uk