North West Audience Survey

thrive
making culture count

End of Year Report

A review of arts and heritage audiences in 2023-24

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The North West survey is supported by

Derry City & Strabane District Council
Comhairle Chathair Dhoire & Cheantar an tSratha Báin
Derry Cittie & Stràbane Destrick Cooncil

Comhairle Contae Dhún na nGall
Donegal County Council

North West Audience Survey

The north west of Ireland shares a rich cultural heritage of archaeology, museum and archival collections, architecture, language and literature, with a vibrant contemporary culture of visual arts, film, performing arts and festivals, traditional and contemporary music.

And in 2019 Derry City & Strabane District Council (DCSDC) and Donegal County Council (DCC) commissioned thrive to undertake population research to provide, for the first time, robust data on how people engage with this rich offer.

The baseline evidenced the significant role that arts and heritage plays in the lives of North West residents with 92% of residents having participated in a cultural activity and 94% having attended a cultural event, venue or museum. The end result: 98% of residents in the North West engages with some form of arts, culture, or heritage.

But it also showed that engagement levels are lower for certain groups of people and that different barriers at different life stages. The research sparked curiosity to know more about audience behaviour to help organisations in the North West to tackle those barriers and ultimately increase engagement for all.

This led to many practical initiatives and a commitment to ongoing audience research across the two areas. Thrive worked then to create the NW Audience survey which allowed organisations to capture the same information on audiences, creating a robust benchmark for the first time.

This report contains the results of the first two years of data collection, giving us insight into:

- Audience demographics
- Audience behaviour
- Audience Experience

To read more about the original research project and audience development plan, click here.

METHODOLOGY

The original aim of this part of the project was to get organisations across the North West to start doing audience surveys or do them more often, so along with the North West cultural partners, we co-created a very short 12 question survey. This gave us a good start, so the sector could look at what current arts, culture, and heritage audiences were like in the North West both as a collective and within individual organisations.

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.

39 organisations across Donegal County Council and Derry City and Strabane District Council have been taking part in the North West Audience Survey. Over 4,400 survey responses have been collected from April 2022 to March 2024.

Participating organisations include: Millennium Forum, The Playhouse, Alley Theatre, Waterside Theatre, Echo Echo Dance Company, Greater Shantallow Community Arts, An Gaelaras, Siege Museum, Eden Place Arts Centre, CCA, Void, In Your Space Circus, Gasyard Wall Féile, Gasyard, InterAct Youth Arts Festival, New Gate Arts and Culture Centre, Derry Feis, The Nerve Centre, Acadamh Ceoil Chaoimhín Uí Dhochartaigh, Allegri, Obon on the Foyle, City of Derry International Choir Festival, Le Foyer des Artistes, Walled City Music, Bogside and Brandywell Health Forum, Foyle Pride Festival, Gasyard Development trust – North West Spectrum Project, Hillcrest Trust, Maiden City Festival, Abbey Arts Centre, An Grianán Theatre, Earagail Arts Festival, Central Library, Fort Dunree Military Museum, Artlink, Regional Culture Centre, Balor Developmental Community Arts, Oideas Gael, Inishowen Carnival Group.

METHODOLOGY

About the project and process

The purpose of the project was to provide support for arts and heritage organisations in the North West to collect their own audience data and build better relationships with their audience.

About the move to IMPACT North West

Based on these conversations with organisations across the North West, we along with Derry City and Strabane District Council and Donegal County Council decided to move towards a more nuanced survey, aimed at getting more details around people's motivations, behaviours, and ultimately the impact arts and culture has on their lives. We have since aligned our survey with our IMPACT Survey, which has been rolled out across Northern Ireland and is funded by the Arts Council of Northern Ireland. This way, we are able to compare data among audiences in the North West with data in Northern Ireland. You can learn more about the IMPACT survey here. If you're an arts, culture, or heritage organisation located in Derry City and Strabane District Council or Donegal County Council and would like to take part in IMPACT North West, please email Eve at eve@wewillthrive.co.uk.

WHAT WE FOUND

Who are the audiences taking the North West survey?

Audiences taking the North West survey differed slightly from the general population in the North West – respondents were more likely to be between the ages of 35-64 and less likely to be disabled. Less than half had children in their household.

What did people see, and who did they bring with them?

Theatre was the most popular culture form, followed by music, participatory classes/events, community, and visual art.

The majority of audiences in the North West attended with someone else, including a spouse/partner, friends, or children of all ages. Just 14% visited a North West organisation on their own.

What did audiences think of their overall experience, and what was the impact of their experience?

Audiences in the North West had a largely positive experience, with 77% rating their overall experience very good. 97% would recommend these kinds of events/venues to their family or friends. More than 9-in-10 agree on the importance of the sector, and that the event/venue made them feel welcome and better for coming/joining in.

How did impact differ by demographics and behaviour?

When measuring the impact on those taking part or attending, geography made a difference- audiences of Donegal organisations were more likely to agree with positive sentences about their experience.

Age was also a factor – people aged 25-54 and 75+ gave higher ratings to the impact statements. Those 16-24 were least likely to agree they felt better after attending, or that the event/venue “is for people like me.”

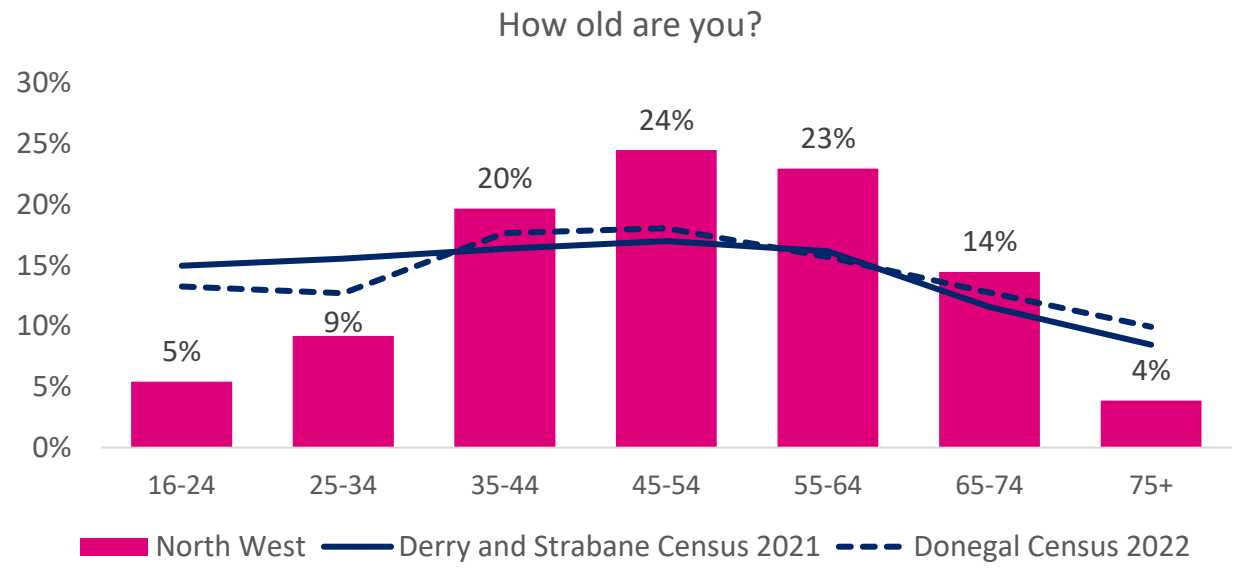
Impact statements varied by who people attended with. Those who attended with a spouse/partner gave the lowest ratings, while those attending alone or with an organised group gave some of the highest ratings.

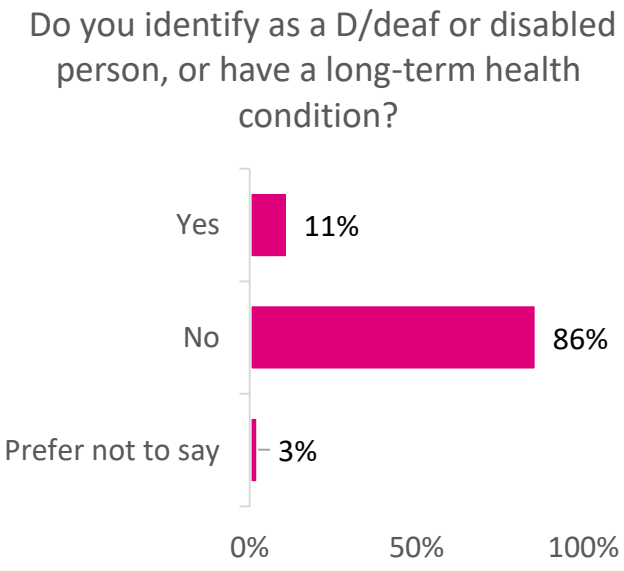
Section 1
North West Audience Data in Total

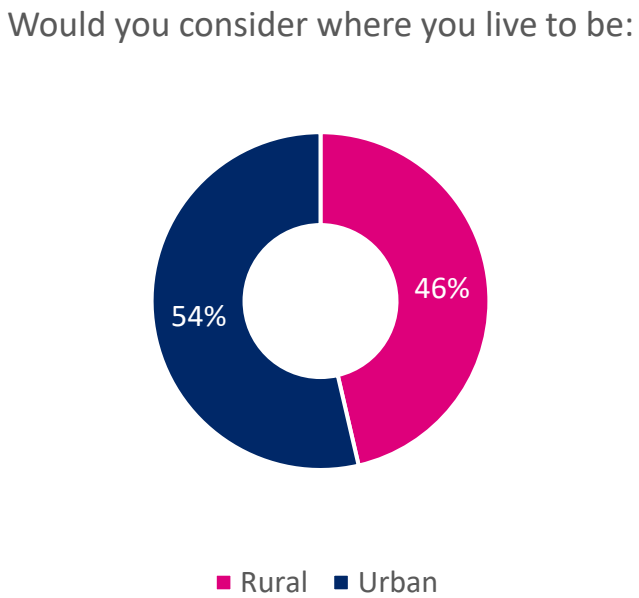
North West respondents were more likely to be from **the middle age groups of 35-64**, with less younger (16-34) and older people (75+) compared to the population of both council areas.

11% of North West respondents were disabled, which is much lower than the census of 27% in Derry and Strabane and 23% in Donegal, according to the most recent census figures.

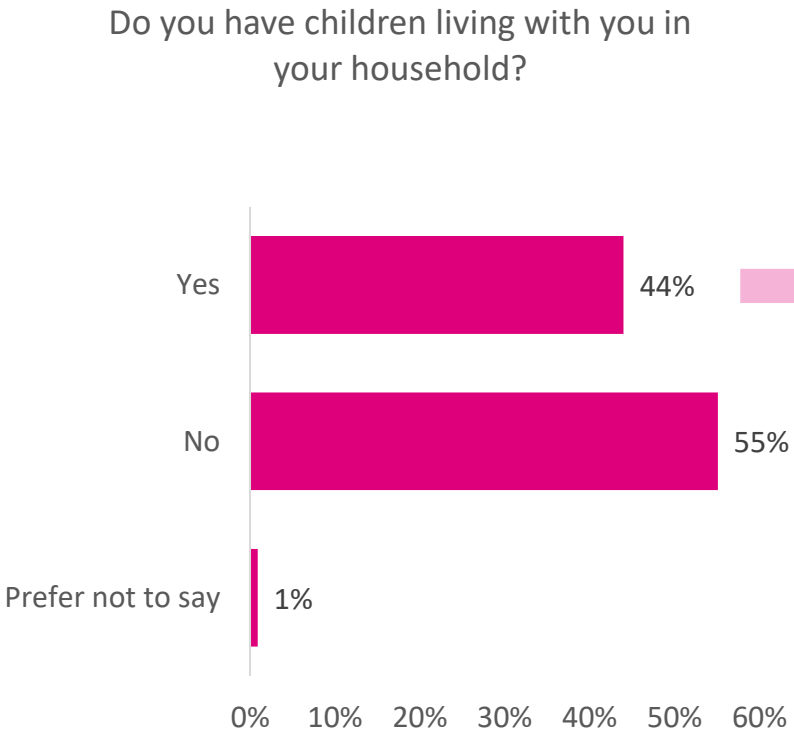
There were slightly more North West audiences living in urban areas.







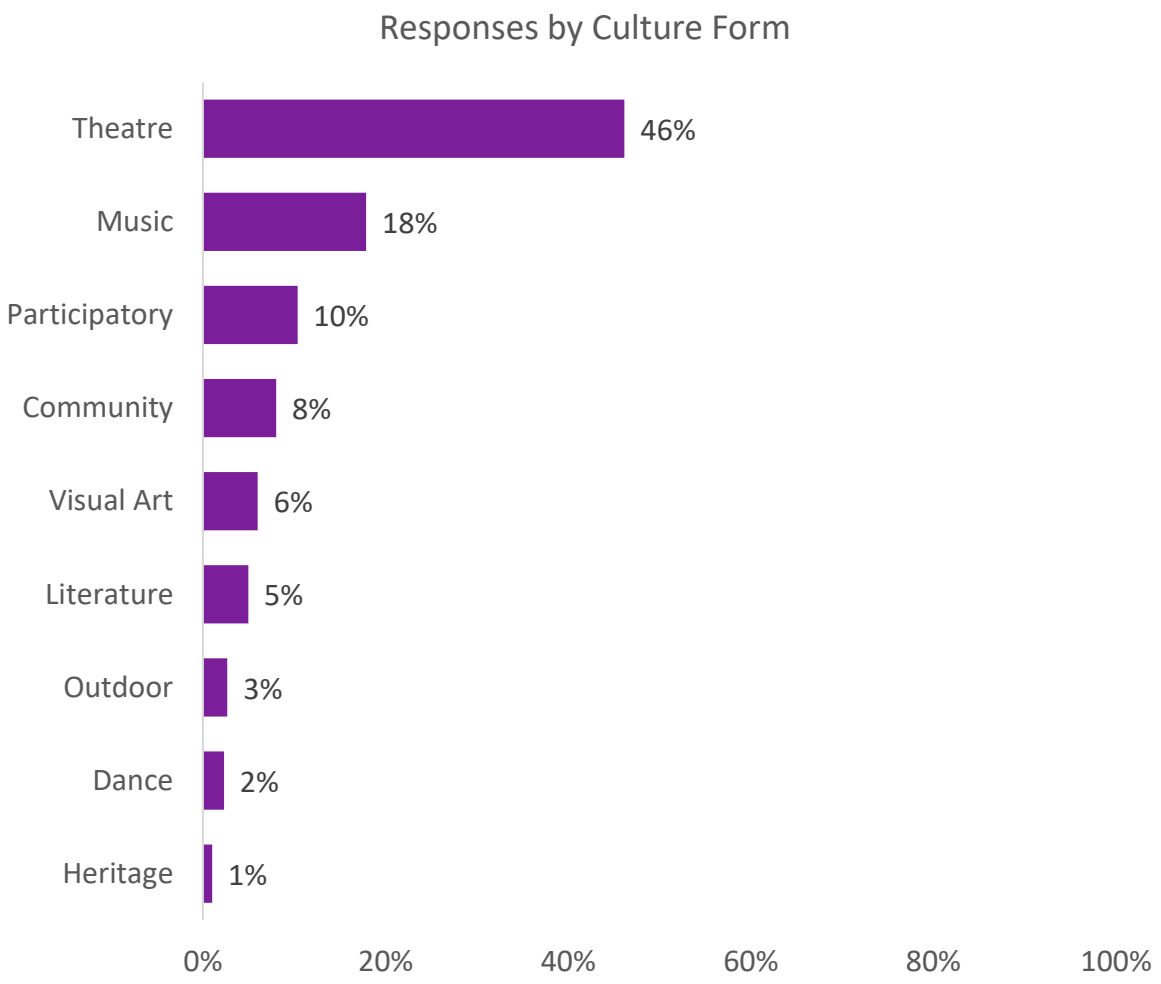
Less than half (44%) of North West audiences have children in their household. In 2023-24, we asked what ages their children were, with over half having older children aged 11-18 in the home. Just over a quarter (28%) had very young children 5 or under, and 38% had children 6-10.



What ages are the children living with you? Please tick all that apply.

Age 5 or under: 28%
6-10 years old: 38%
11-18 years old: 61%

Nearly half of all North West audiences surveyed visited the theatre. After this, music, participatory classes/events, community, and visual art were the most popular culture forms.

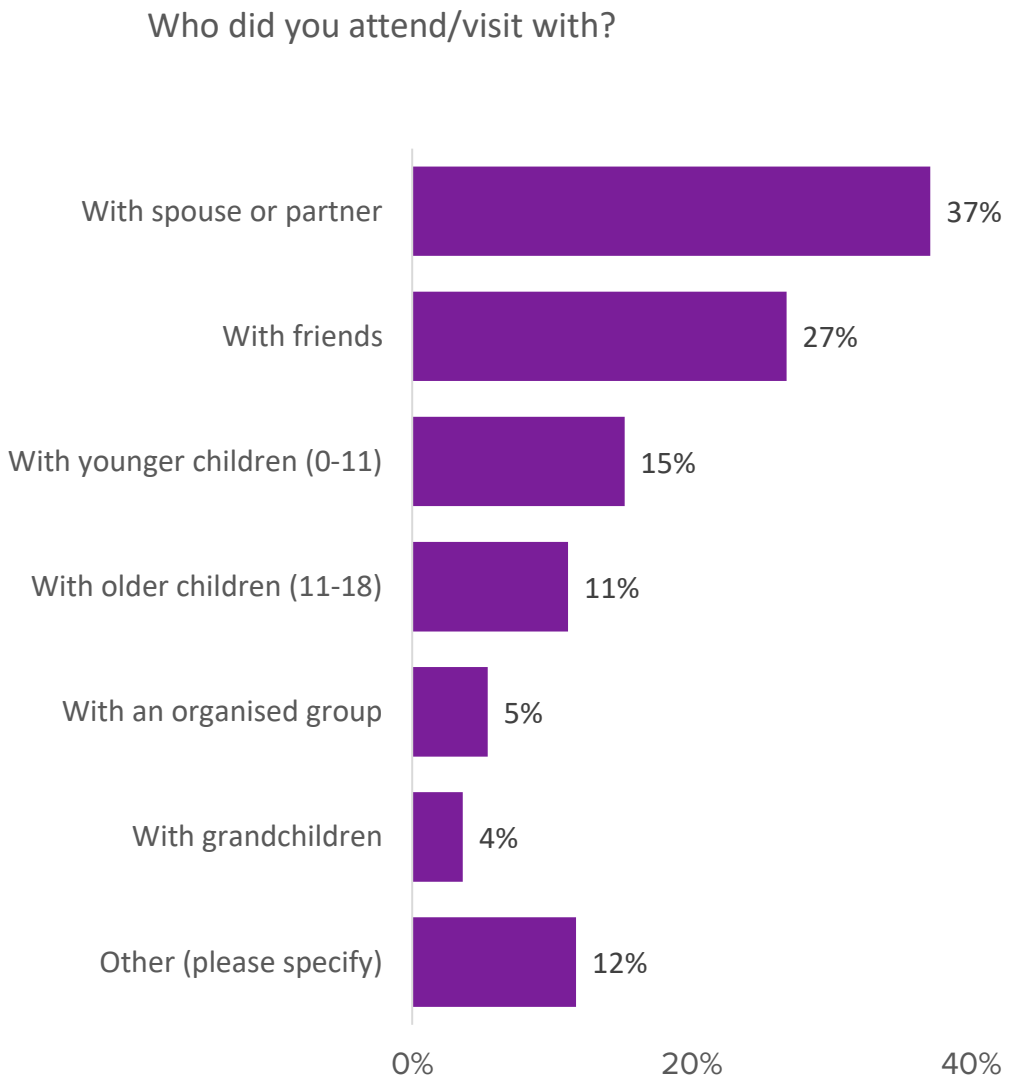


14%

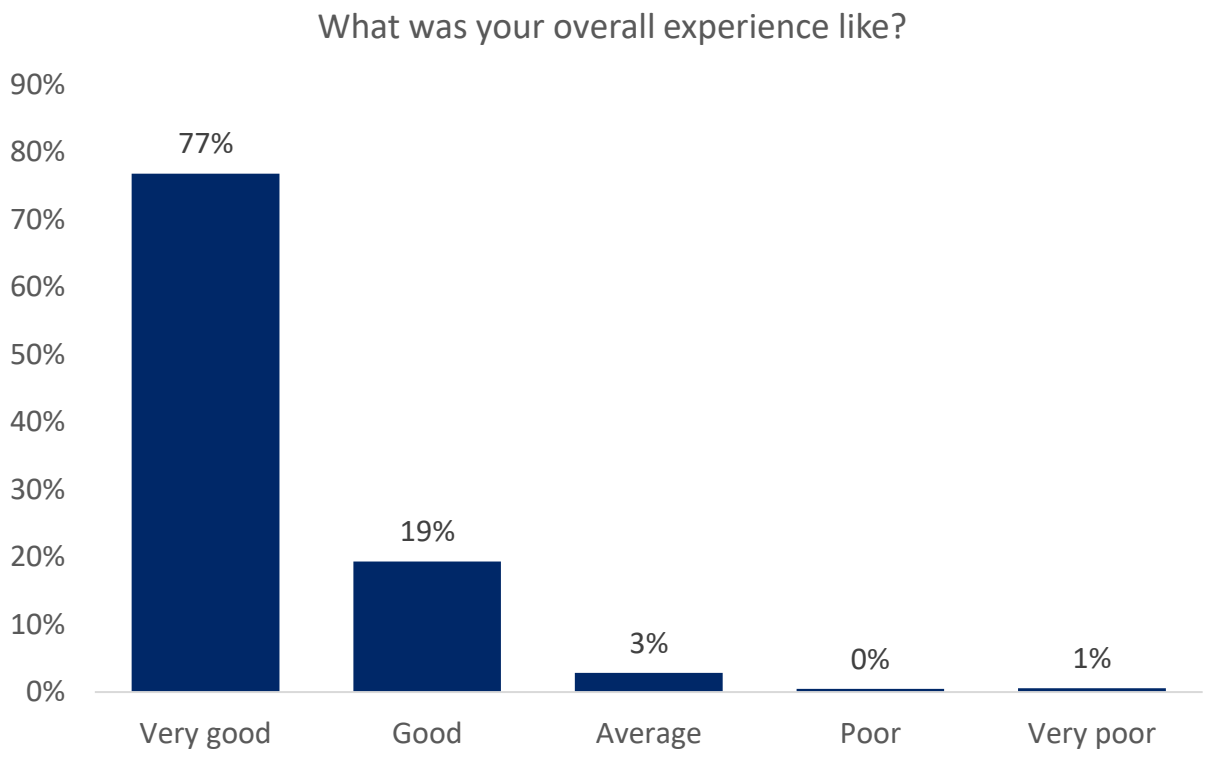
Visited a North West organisation alone

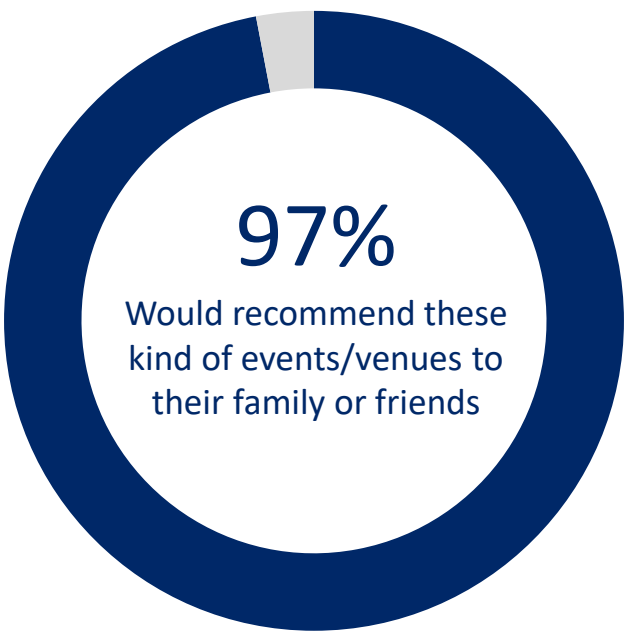
Arts and culture in the North West is very much a **social outing** – just 14% visited on their own.

Audiences in the North West mainly attended with a spouse/partner, with friends, or with their children.

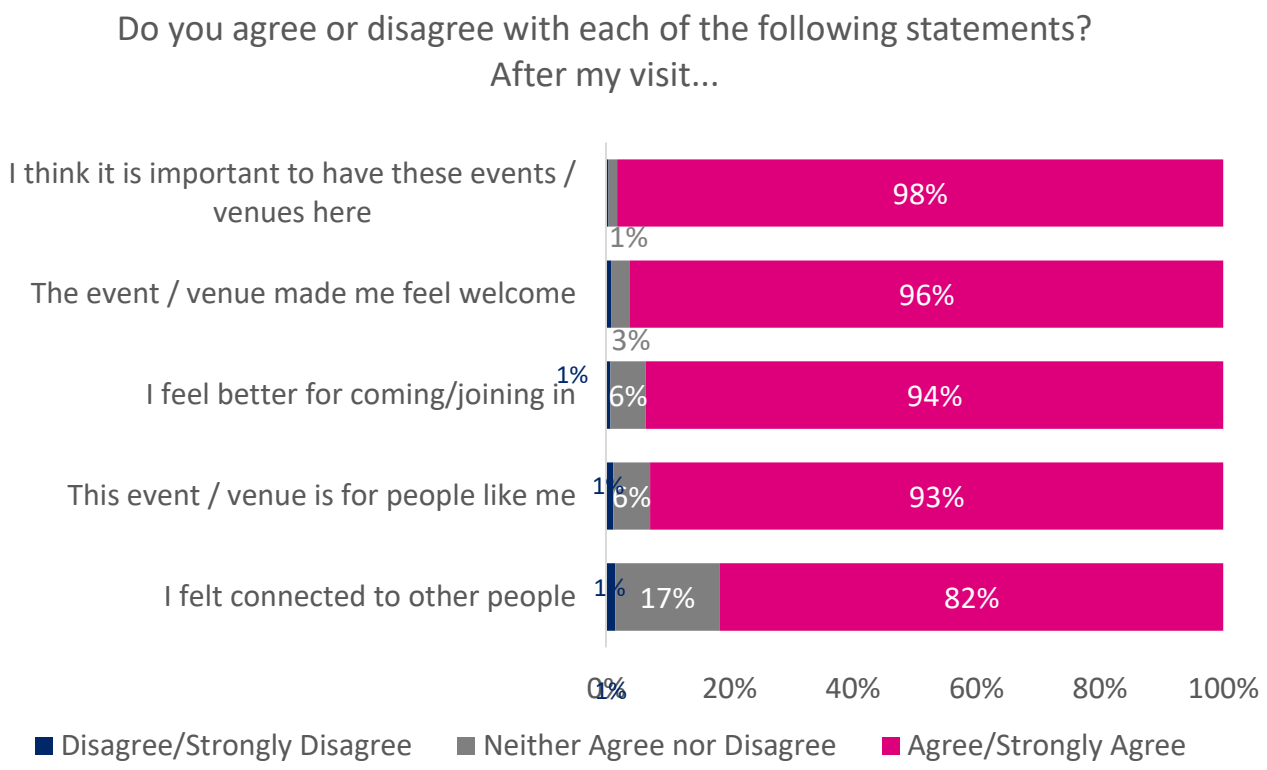


Most audiences in the North West had a positive experience – 77% rated their overall experience as very good, and 97% would recommend these kind of venues/events to their family or friends.





More than 9-in-10 respondents agreed that it's important to have these events/venues in the North West, that they felt welcomed, felt better after their visit, and felt the space was 'for them.' 82% agreed that they felt connected to other people as a result of their visit.

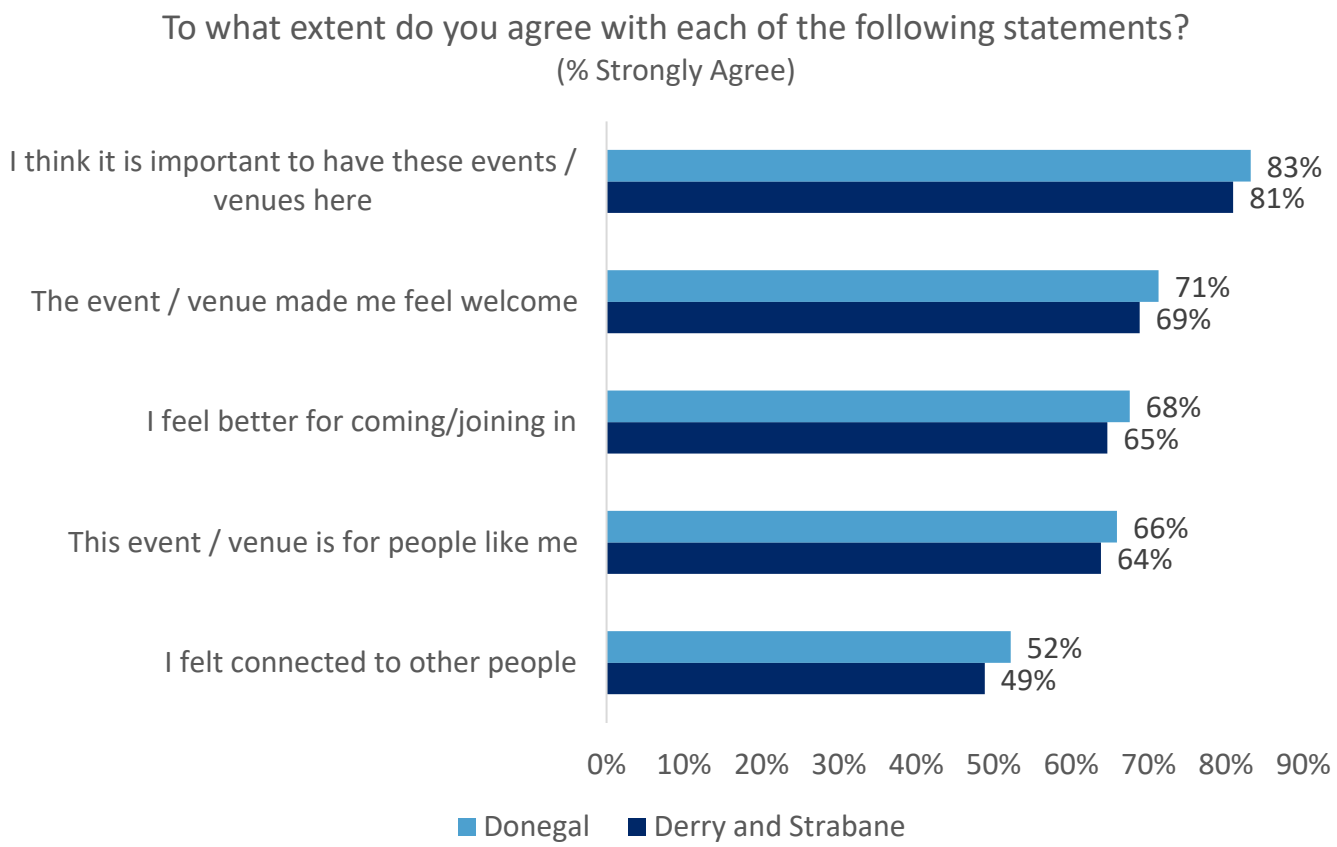


Section 2

How the impact statements differ by demographics and behaviour

Audiences of Donegal organisations rated their experiences slightly more positively compared to those visiting an organisation in Derry and Strabane.

Differences by area



Impact differed by age, with the middle age groups (25-54) and 75+ audiences feeling more positive towards each of the impact statements. People in the youngest age group, 16-24, were least likely to agree they felt better for coming/joining in, or that the event/venue is for people like me.

Differences by age

To what extent do you agree with each of the following statements?
(% strongly agree by age)

	TOTAL NW	16-24	25-34	35-44	45-54	55-64	65-74	75+
I think it is important to have these events / venues here	**82%**	79%	83%	83%	83%	81%	80%	75%
The event / venue made me feel welcome	**70%**	70%	72%	72%	69%	67%	70%	72%
I feel better for coming/joining in	**66%**	62%	66%	67%	67%	64%	63%	70%
This event / venue is for people like me	**65%**	59%	66%	67%	67%	62%	62%	65%
I felt connected to other people	**50%**	51%	55%	50%	50%	47%	50%	55%

Key (by row): Lowest — Highest

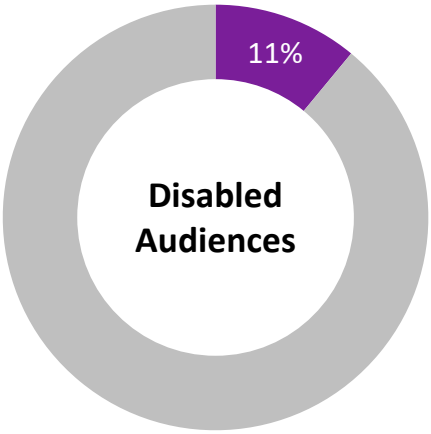
Who people attended with also affected their perspective on the experience. Those attending with a spouse or partner had the lowest percent of people agreeing with each of the five impact statements. Those attending alone or with an organised group were much warmer, and gave more positive ratings to each of the five statements.

Differences by behaviour

To what extent do you agree with each of the following statements?
(% strongly agree by who they visited with)

	TOTAL NW	Alone	Spouse/ partner	Friends	Younger kids	Older kids	Group
I think it is important to have these events / venues here	**82%**	84%	81%	83%	83%	83%	86%
The event / venue made me feel welcome	**70%**	75%	67%	70%	71%	73%	79%
I feel better for coming/joining in	**66%**	73%	62%	66%	68%	70%	75%
This event / venue is for people like me	**65%**	69%	62%	66%	66%	70%	73%
I felt connected to other people	**50%**	60%	44%	54%	52%	54%	65%

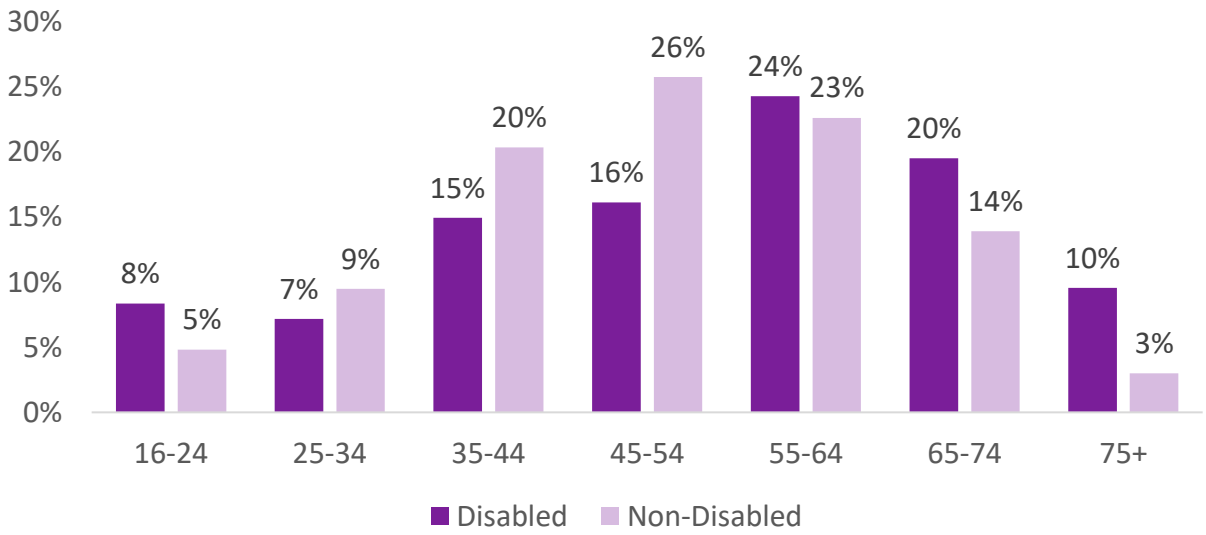
Section 3
A closer look at disabled audiences



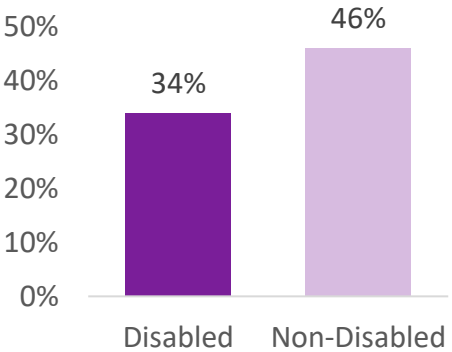
Disabled audiences represent a small portion of the total North West audiences surveyed. Looking at age, disabled audiences were more likely to be 55+ or age 16-24.

Based on the age groups represented, it makes sense that disabled audiences were less likely to have children in the home. However, of the disabled audiences who had children, they were more likely to have younger children aged 10 and under compared to non-disabled audiences.

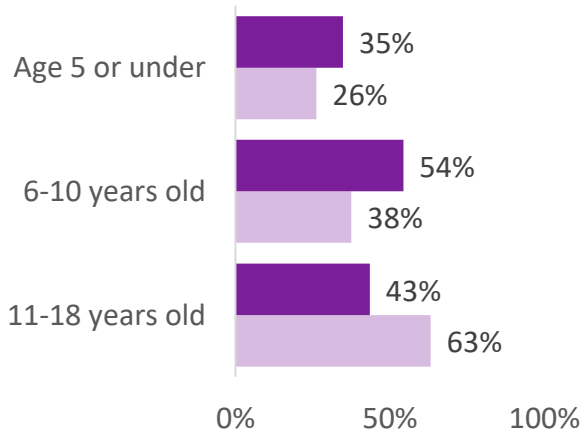
Which of the following best describes your age?



Do you have any children living with you in your household? (% yes)

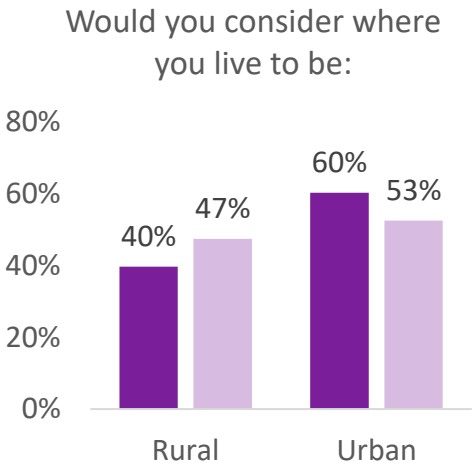


What ages are the children living with you? Please tick all that apply.

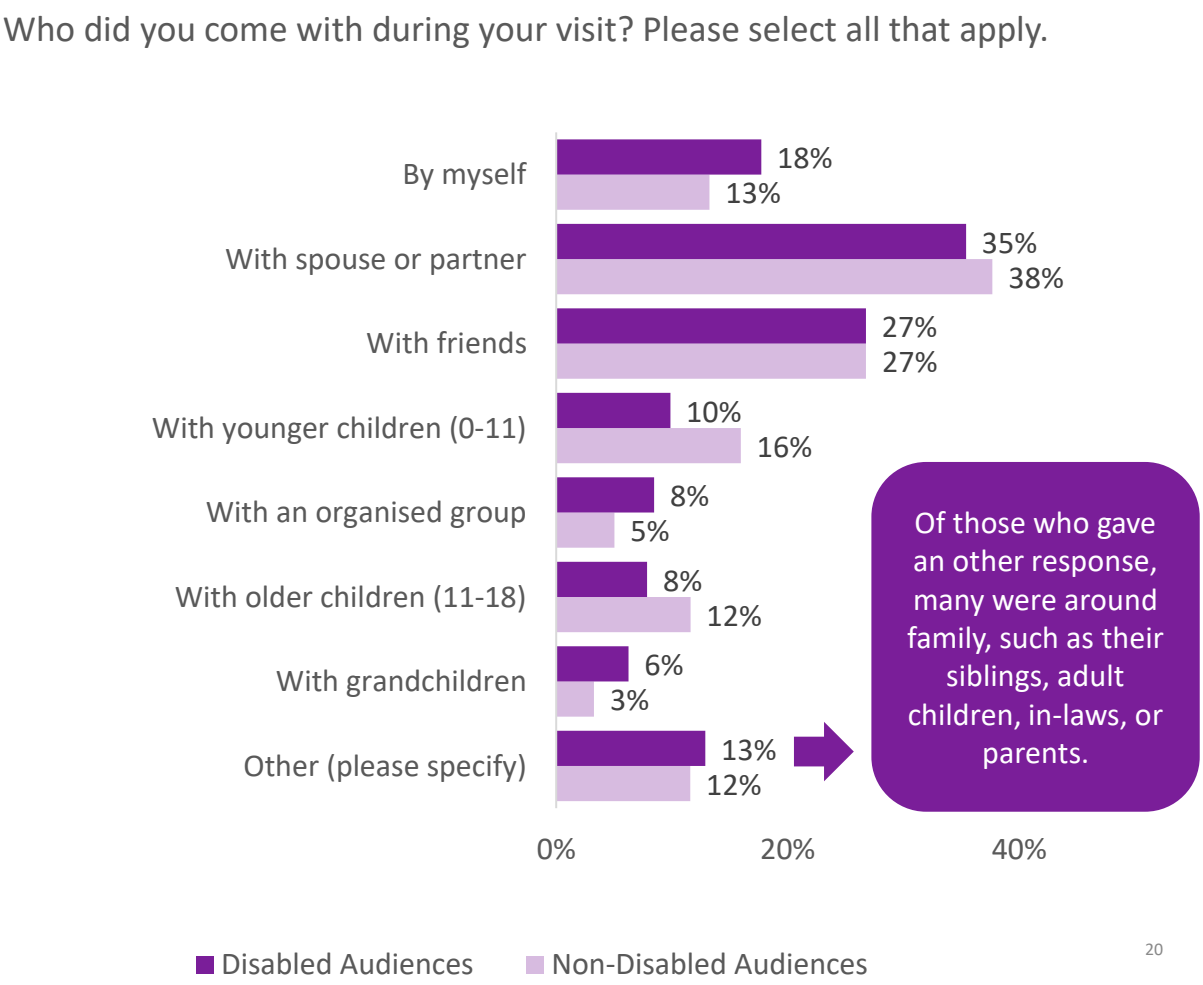


Disabled audiences were more likely to report living in urban areas, and there was a higher percent of disabled people attending organisations in Derry and Strabane compared to Donegal.

Disabled people were more likely to have attended with an organised group or with grandchildren. They were also more likely to be attending on their own.



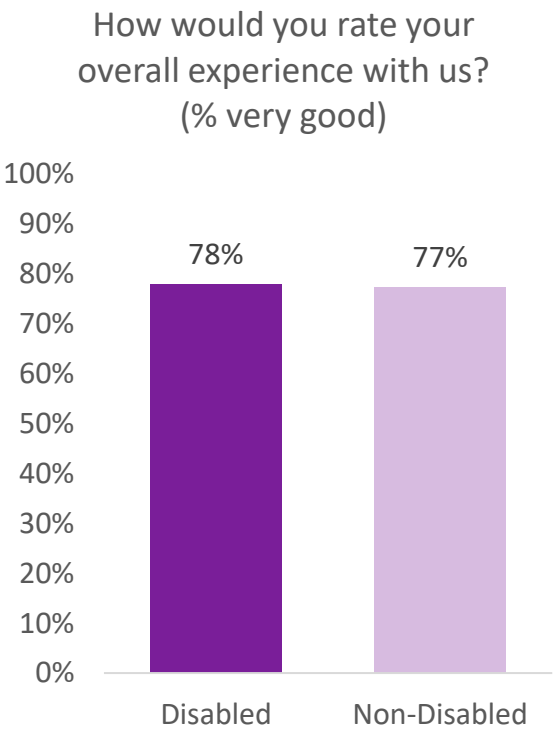
	Derry and Strabane	Donegal
% of Disabled Audiences	13%	7%

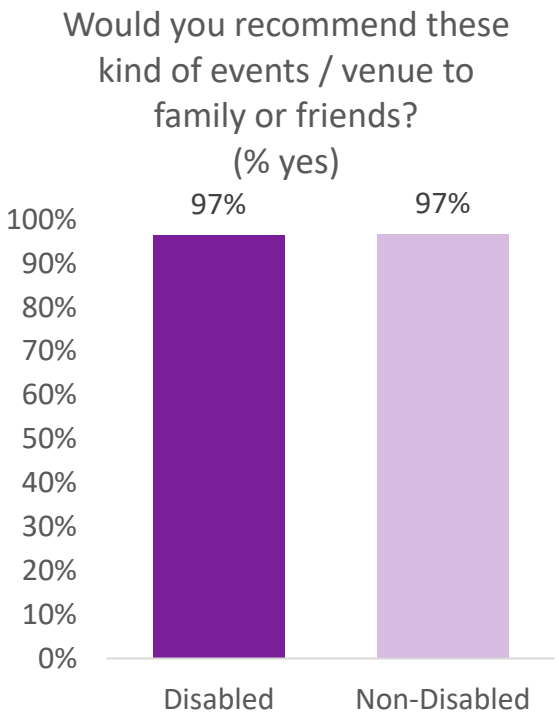


DISABLED AUDIENCES

Disabled audiences rated their overall experience slightly higher than non-disabled audiences. 97% of disabled audiences recommend the events/venues to their family or friends, which is on-par with non-disabled audiences.

When people were asked for open-ended feedback, disabled audiences mentioned their appreciation for inclusive events, extra help and guidance, and ease of accessibility. Constructive comments from disabled audiences focused on more parking, better directions and signage, and a desire for a virtual tour of the venue.





Selection of positive comments from disabled audiences:

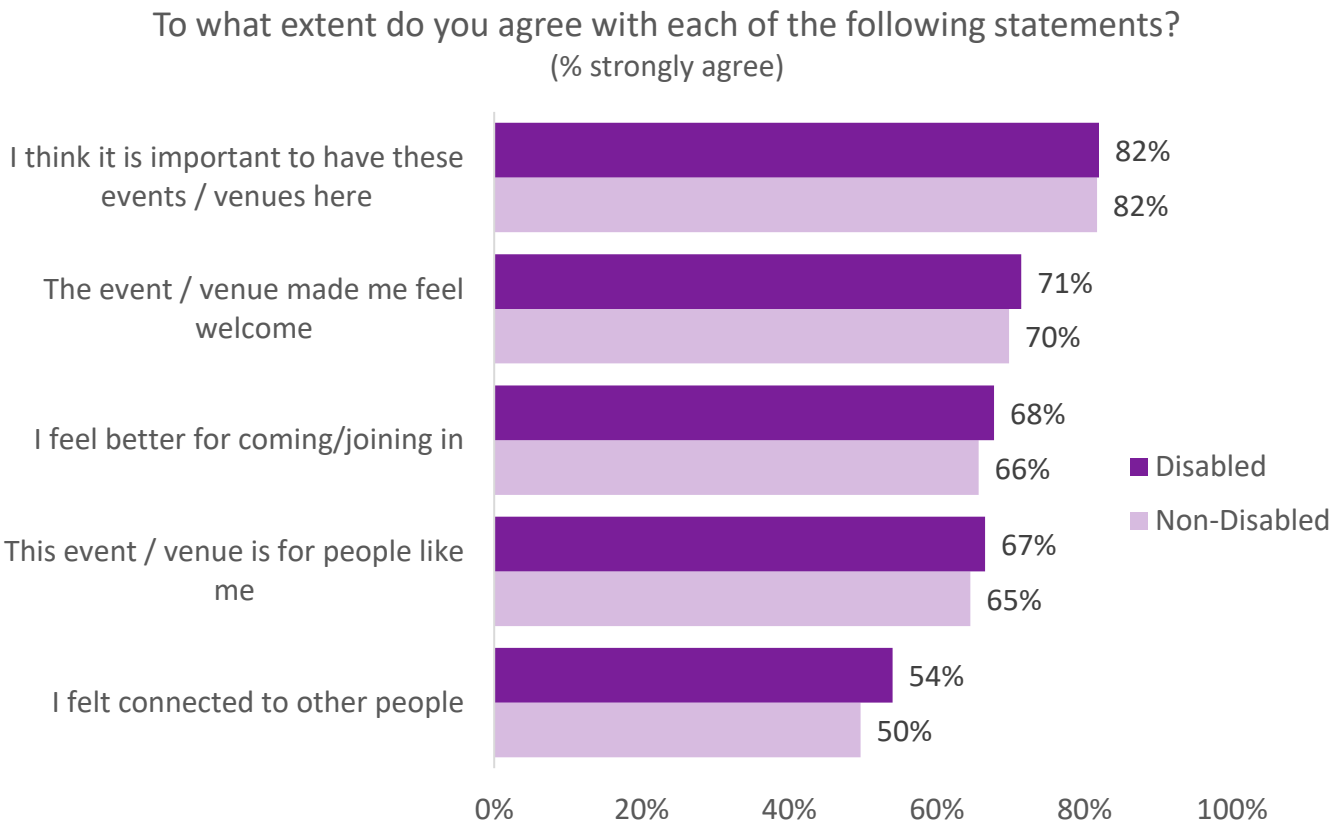
- "It has been perfect so far and being disabled I have appreciated the help and guidance I've been given"
- "seeing how my children, especially my ASD son relaxes and loves it."
- "have more events that are inclusive like this one"
- "Very nicely decorated, as someone with mobility issues I found it very accessible and easy to get around."

Selection of constructive comments from disabled audiences:

- "More parking nearby for disabled More online engagement More programming for older people"
- "Bit hard to find one's way around the building"
- "Provide a virtual tour of the theatre for people wanting to visit"
- "Signage and directions"

DISABLED AUDIENCES

Disabled audiences were more likely to strongly agree with four of the five impact statements. The biggest difference was around connection: disabled audiences were more likely to strongly agree that they felt connected to other people.



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