

# IMPACT

Arts attendance in Northern Ireland  
Full report 2024-25



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# INTRODUCTION

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.

Because the people here aren't like anywhere else.

Northern Ireland deserves to have its own information on the people who attend the arts. And that is why we are delighted to present the results of thrive's IMPACT research for 2024-2025. This post-visit survey has let us see for the first time who audiences are, how they behave, why they attend and how they feel after attending.

In the past 12 months we heard from 2805 audience members, bringing our total data set to almost 6000 people since September 2023. A huge variety of arts organisations helped us collect the data from all across the country and from a variety of artforms.

The research has also changed and evolved based on these learnings. We changed some questions and added others so we could respond to what we were seeing and hearing. We've made the survey itself more flexible for individual organisations, adding specific modules about audience experience and a bespoke module for festivals.

The data paints a picture of a hungry audience whose behaviour, tastes and motivations shift and develop. It also shows that there is not simply one story that can be told about arts engagement. Audiences span all age groups and backgrounds.

Those living in the most deprived areas have different booking and engagement patterns compared to the total average. Disabled audiences face a wide range of barriers to engagement long before they set foot in a cultural space.

The research proves the economic impact of arts and culture. In addition to purchasing tickets, IMPACT audiences spent £91,644 on additional items. This includes food/drinks in and outside the venue, money spent in the local area, and money spent on paid accommodation.

It also shows the social impact, because most people attend arts and culture more than six times a year- younger, older, regardless of having children at home, disability, or what they earn. Even when it comes to the cost of living, some people will- and we quote directly here- "live on beans and toast" before compromising the amount of arts and culture they go to.

That is quite a story of cultural engagement in Northern Ireland.

# SECTION 1

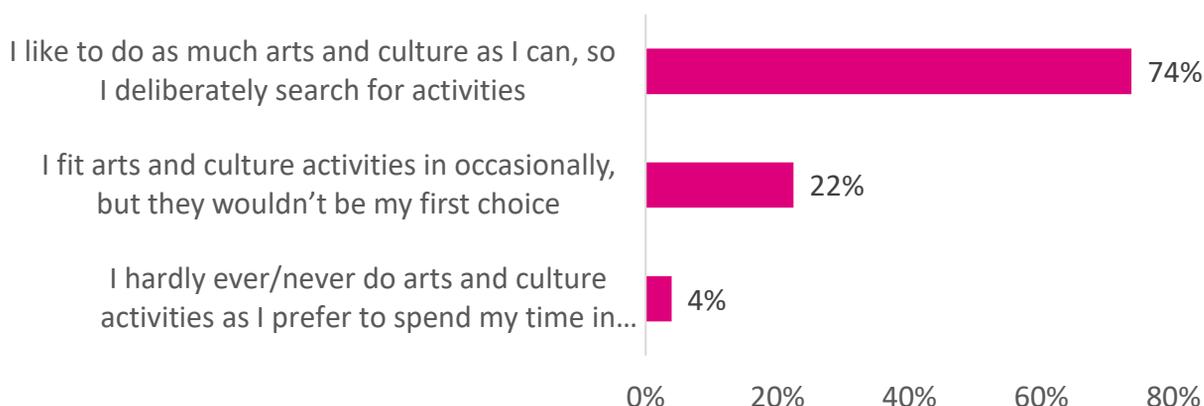
## AUDIENCE BEHAVIOUR



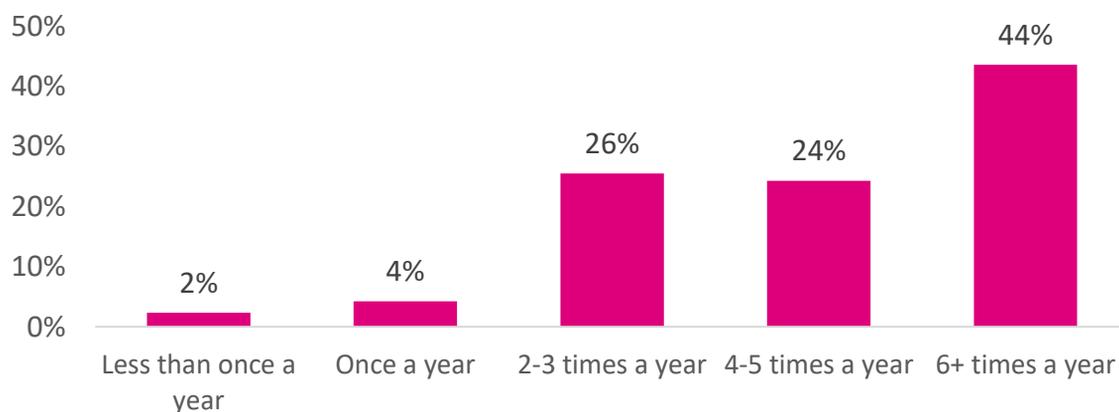
**Arts and culture is an important part of IMPACT audiences' lives.** We asked audiences to put themselves into one of three attitudinal segments: those who see arts and culture as a priority, those who fit arts and culture in occasionally, and those who hardly ever engage. 74% of IMPACT respondents like to do as much arts and culture as they can, so they deliberately search for activities. Arts and culture is more of a priority for this segment. An additional 22% fit arts and culture activities into their lives occasionally, though it isn't their first choice. Just 4% say they hardly ever/never engage in the sector.

**Most audiences engage with arts and culture multiple times a year.** 93% of IMPACT audiences engage in arts and culture 2 times a year or more, including 44% who engage 6+ times a year.

Which of these phrases best describes your attitude towards doing cultural activities? (Select one)



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

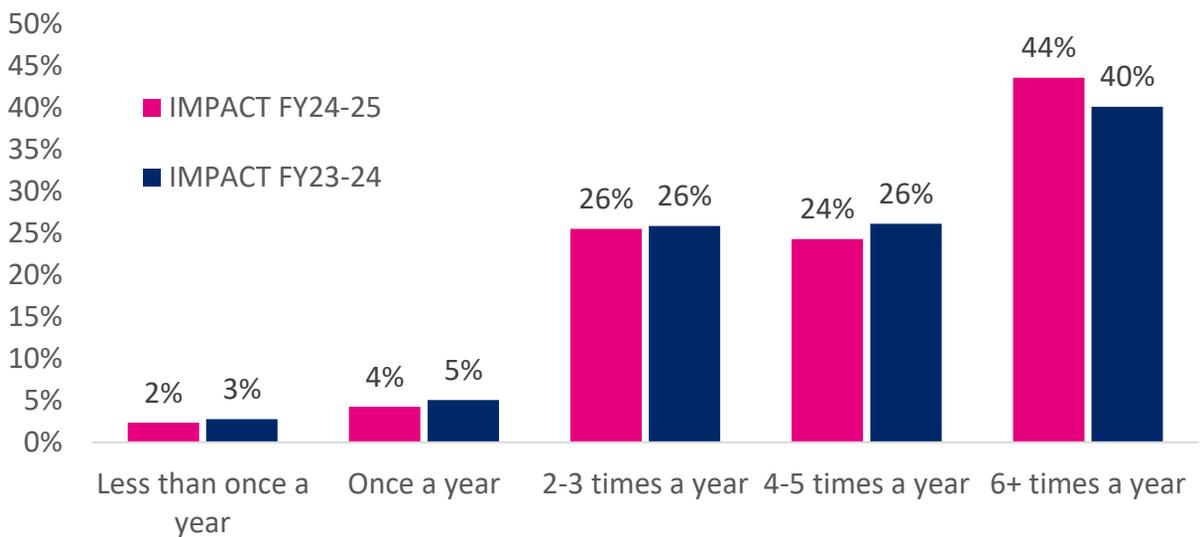


# AUDIENCE BEHAVIOUR

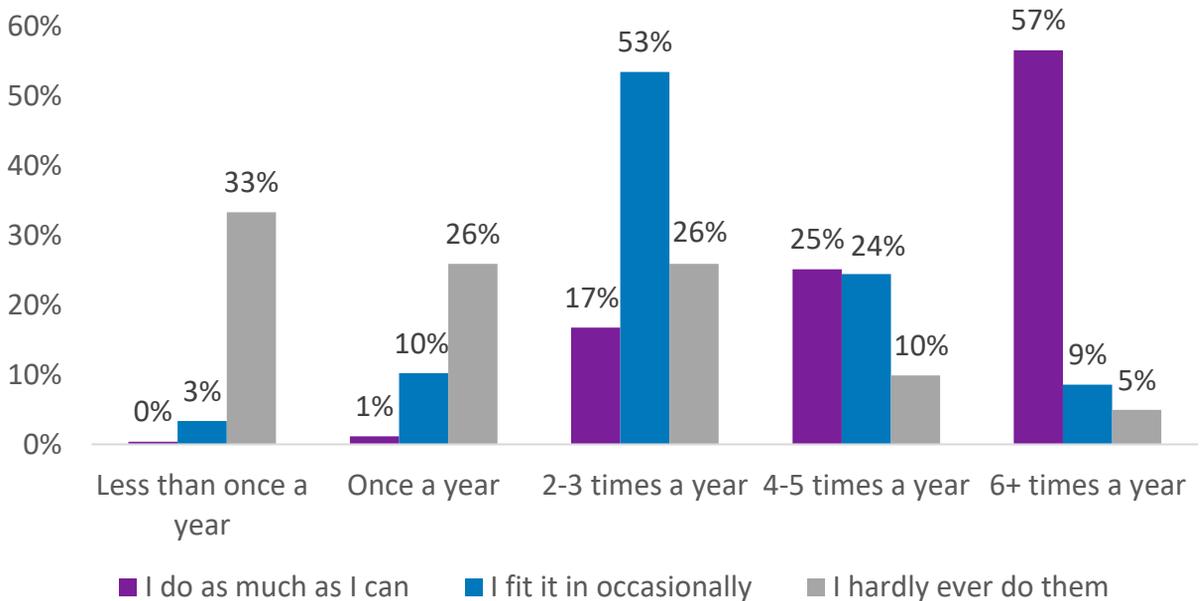
**Audiences this year engage more frequently on average.** 44% of audiences in FY24-25 engaged 6+ times a year compared to 40% last year (FY23-24).

**One person’s ‘hardly ever’ can be just as frequent as another’s ‘as much as I can.’** We would expect the people who say they do as much arts and culture as they can to be highly engaged, and 57% of them do attend or participate 6+ times a year. However, there are also some people who say they occasionally/hardly ever engage, yet they still attend or participate 6+ times a year. This suggests that everything is relative – a person may *feel* that they hardly ever get to experience arts or culture, but they are actually engaging a lot.

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

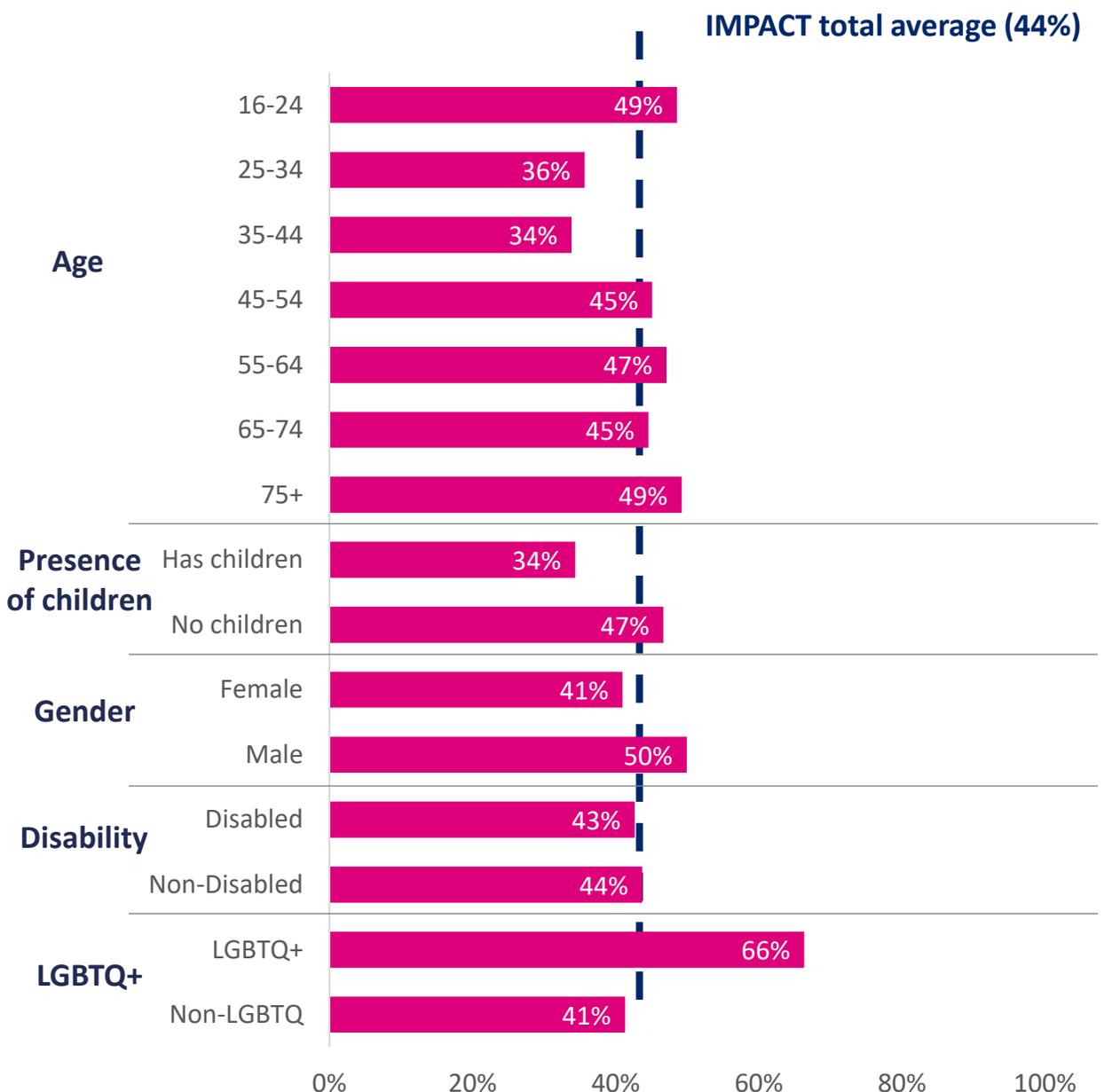


How often do you attend or participate in arts and culture experiences?

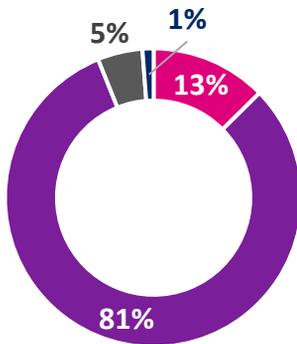


**Over a third of audiences (regardless of demographics) engage with arts and culture 6+ times a year.** While some demographics engage more frequently, the overall level of engagement is very high among IMPACT audiences in general. The groups engaging less often include people aged 35-44 and those with children in the household, and those engaging the most often are people without children, men, and LGBTQ+ audiences. It's also notable that the youngest group (aged 16-24) are engaging more often than older age groups.

How often do you attend or participate in arts and culture experiences? (% engaging 6+ times a year)



How did you feel about going?

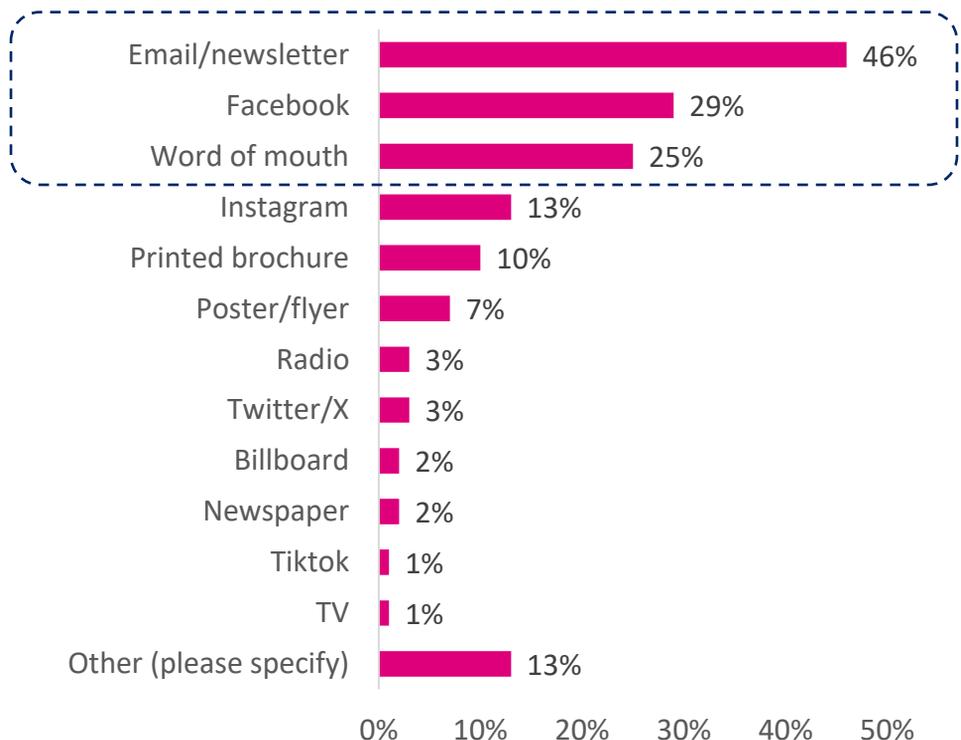


- I could not wait to go
- I was really looking forward to it
- I felt neutral/indifferent
- I wasn't looking forward to it

**Anticipation was high for the majority of people.** 81% were really looking forward to their visit, and 13% could not wait to go.

**Audiences mainly heard about the event/space via email, Facebook or word of mouth.** Print isn't dead though: 10% cited printed brochure and 7% poster/flyer. The least-cited channels are the traditional channels of radio, newspaper and billboards.

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

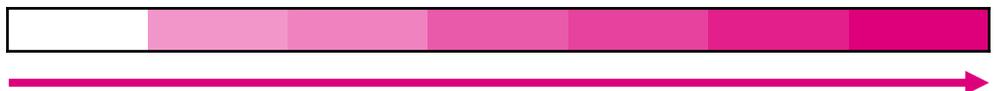


## AUDIENCE BEHAVIOUR

**Certain marketing channels are more popular among different age groups.** Instagram, TikTok and word of mouth are most popular among those aged 16-44. Facebook is the most popular among people 45-54. Email/newsletter and printed brochure are more popular among people 65+.

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

	TOTAL FY24-25	16-24	25-34	35-44	45-54	55-64	65-74	75+
Email/newsletter	46%	9%	32%	36%	45%	50%	58%	65%
Facebook	29%	10%	26%	31%	38%	32%	19%	17%
Word of mouth	25%	54%	29%	30%	24%	22%	20%	26%
Instagram	13%	57%	34%	21%	14%	6%	2%	3%
Printed brochure	10%	3%	9%	4%	8%	10%	13%	26%
Poster/flyer	7%	6%	9%	6%	7%	5%	8%	6%
Twitter/X	3%	0%	5%	4%	5%	2%	1%	2%
Radio	3%	4%	4%	3%	3%	2%	2%	5%
Newspaper	2%	1%	3%	1%	2%	2%	4%	6%
Billboard	2%	1%	4%	2%	2%	2%	2%	2%
TV	1%	3%	1%	0%	1%	1%	1%	2%
TikTok	1%	6%	2%	1%	1%	0%	0%	2%
Other (please specify)	13%	7%	10%	14%	15%	12%	12%	9%



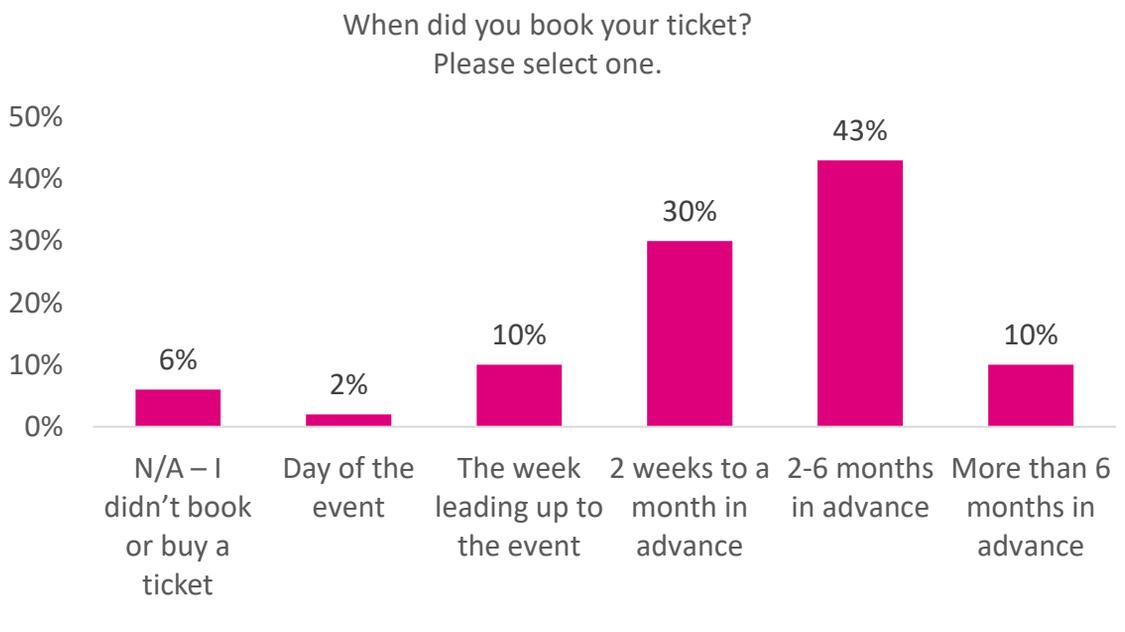
**Key:**

Lowest in the row

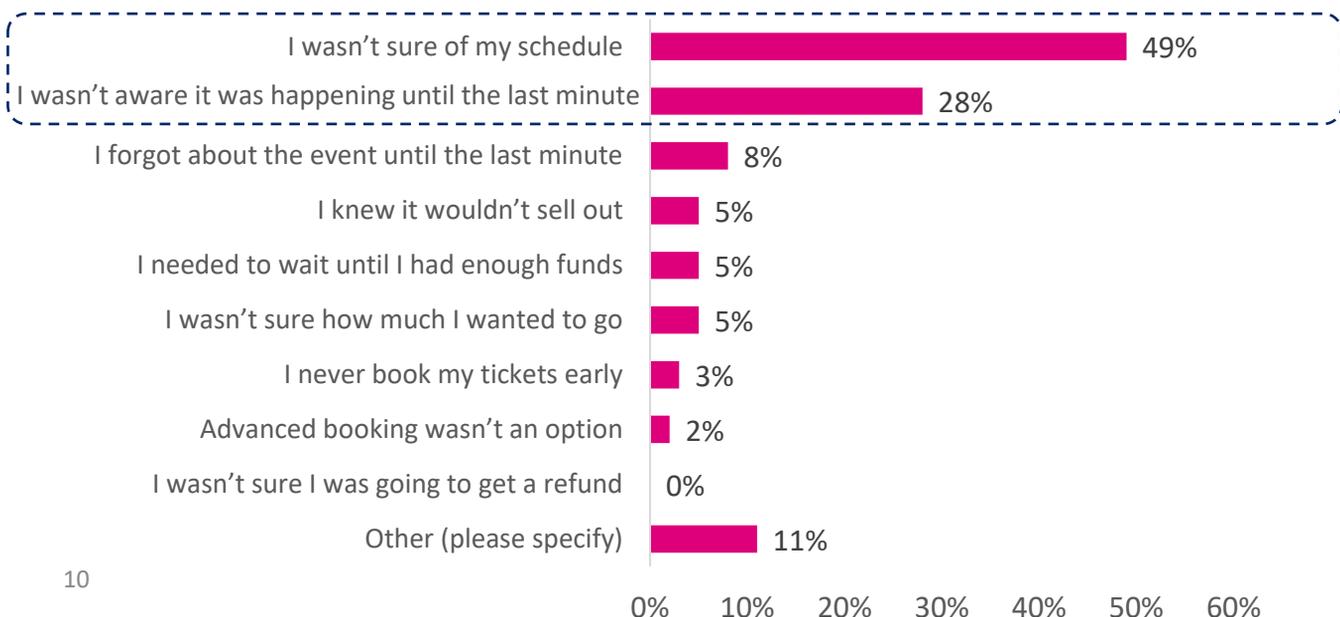
Highest

**Last-minute bookers made up 12% of IMPACT audiences.** 12% booked tickets the day or week of their visit. 73% said they booked between 2 weeks to 6 months in advance, with just 10% booking more than 6 months in advance. A small percentage (6%) didn't book or buy a ticket.

**Reasons for last-minute booking were largely around schedule uncertainty or lack of awareness.** Just under half (49%) of last-minute bookers said they booked late because they weren't sure of their schedule. Just over a quarter (28%) said they weren't aware of the event until the last minute. Just 5% of last-minute bookers cited lack of funds as a reason for booking last minute.



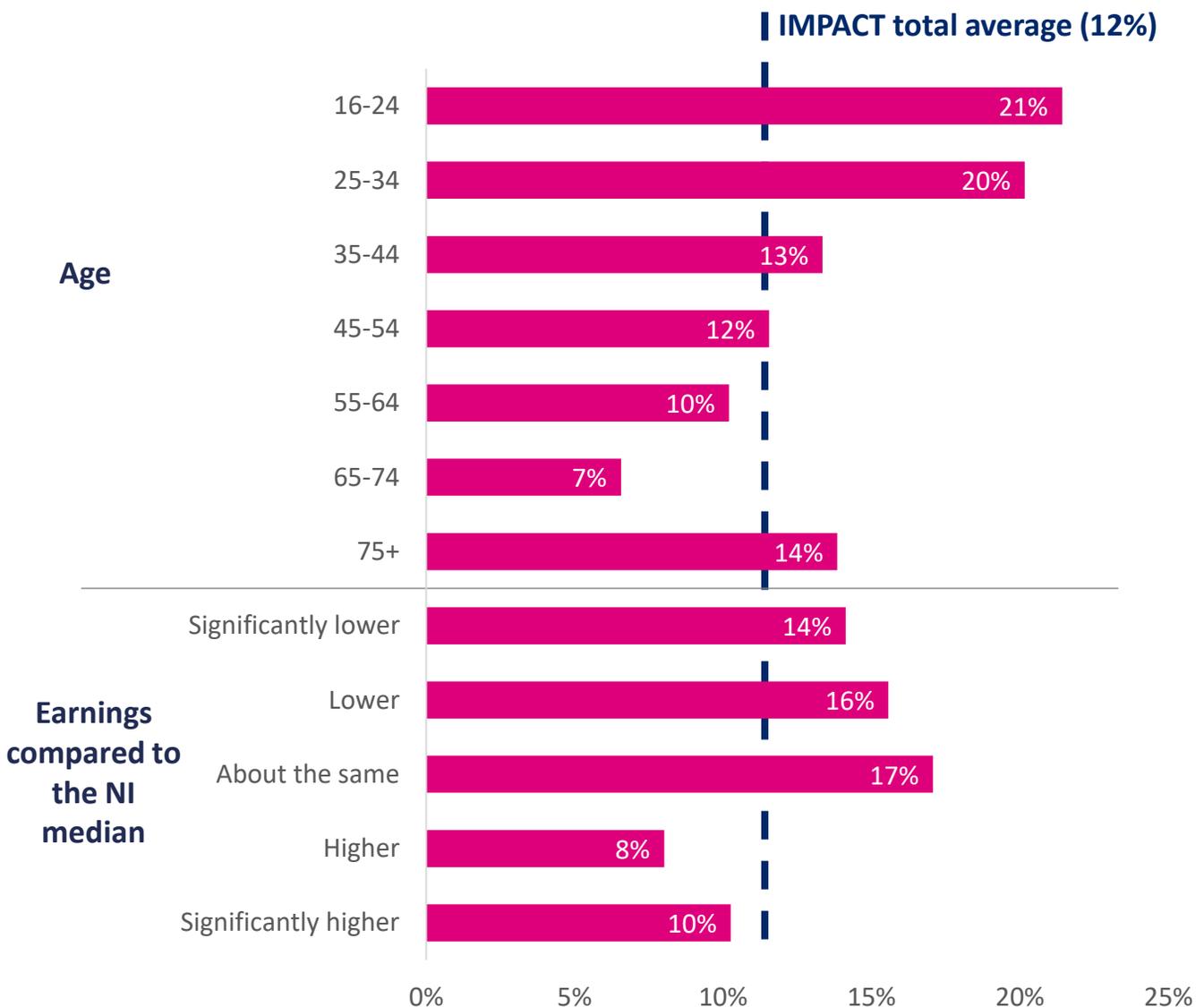
What was your reason for booking close to the day of the event?  
Select all that apply.



## AUDIENCE BEHAVIOUR

We looked at the data by age and found that younger audiences were more likely to be last-minute bookers, especially those aged 16-34. We also tested whether earnings played a part, and found that people with earnings at or below the NI median were more likely to book tickets at the last minute.

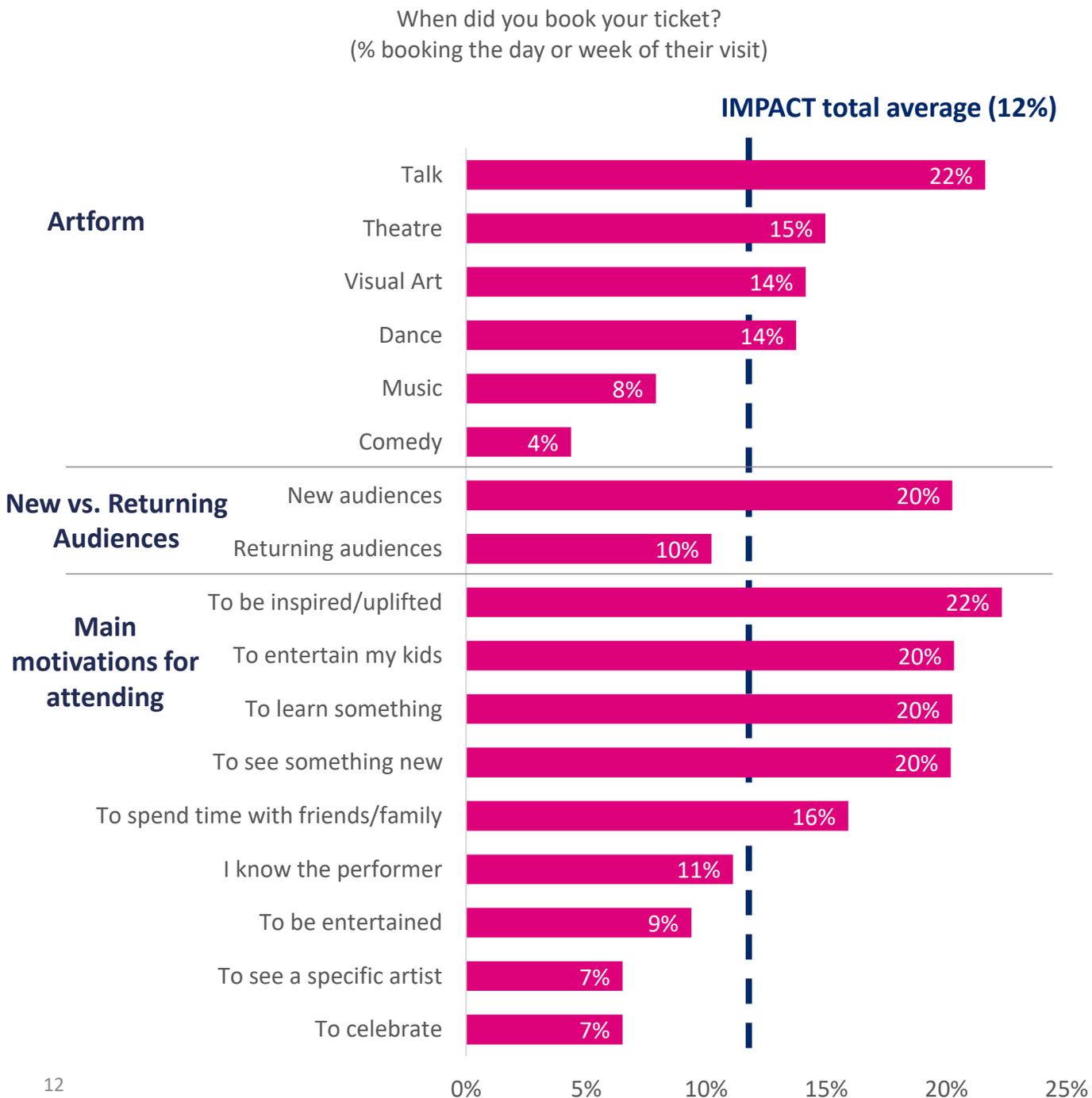
When did you book your ticket?  
(% booking the day or week of their visit)



## AUDIENCE BEHAVIOUR

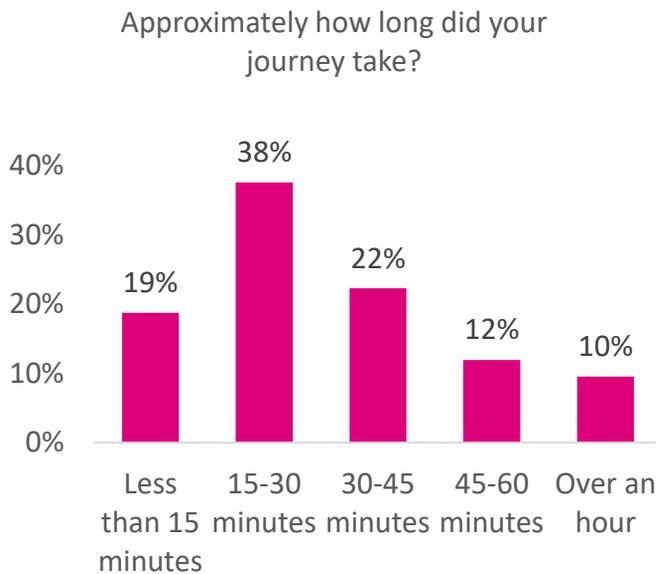
**Last-minute booking patterns vary based on other factors.** New audiences to a venue/space are twice as likely to book last minute (the day/week of their visit) compared to returning audiences. Certain artforms have more last-minute bookers than others, including those attending talks, theatre, visual art and dance.

Having confidence in ticket availability may have an influence on when people book. Those attending music and comedy had the smallest percentage of last-minute bookers, potentially due to people not willing to risk tickets selling out. People attending something to celebrate or see a specific artist were also the least likely to book last-minute.

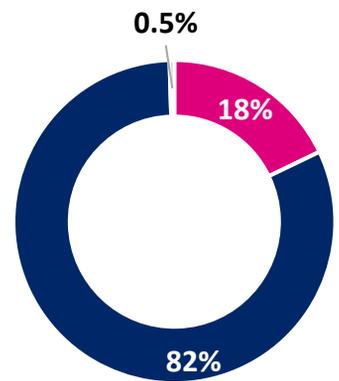


## AUDIENCE BEHAVIOUR

**Journey times are relatively short.** Over half (56%) of IMPACT audiences travelled 30 minutes or less to the venue/space, including 19% who were hyper-local, coming from 15 minutes away. **Most respondents (82%) were returning audiences** to the venue. 18% were new to the venue/space they visited. Most people taking the survey saw either a music or theatrical performance. **Music was the most popular artform** with 42% of respondents attending a music performance, followed by 26% of people attending a play or musical.

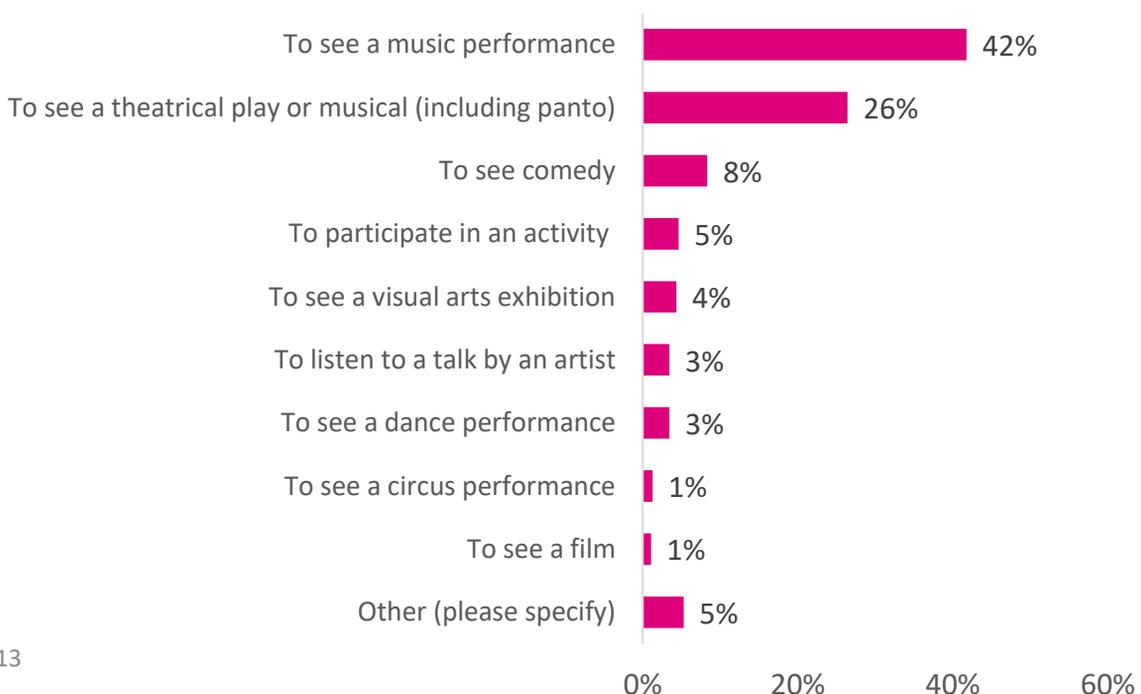


Is this your first time visiting this building/space?

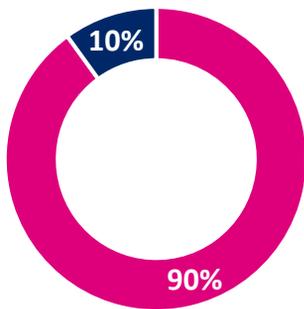


■ Yes ■ No ■ Not sure

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



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

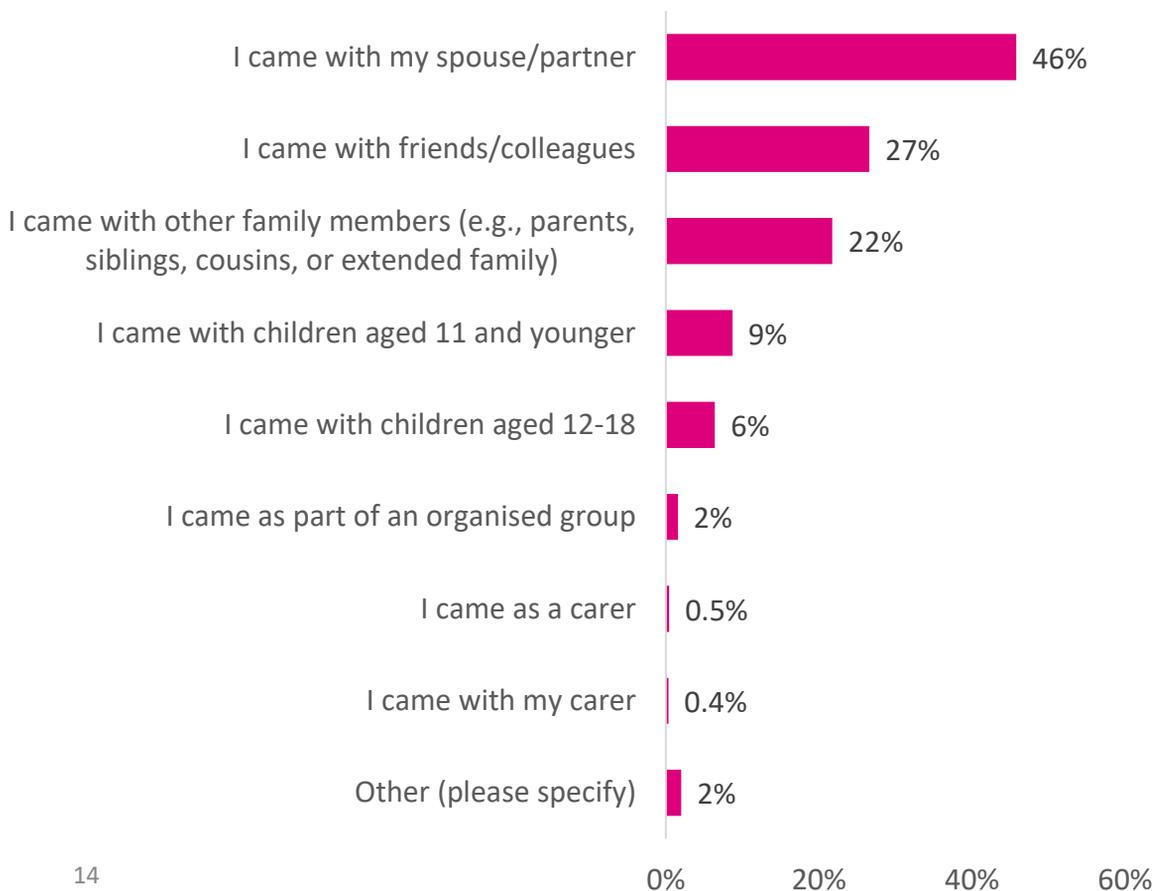


■ Attended with someone else ■ Came alone

**Arts and culture continue to be a social outing.** 90% of IMPACT audiences attended with someone else, just 10% went to something alone.

**Most people attended with a spouse/partner, friends, or family members.** Only a small percentage attended with children – 9% came with children under 12 and 6% attended with children 12-18.

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



## SECTION 2

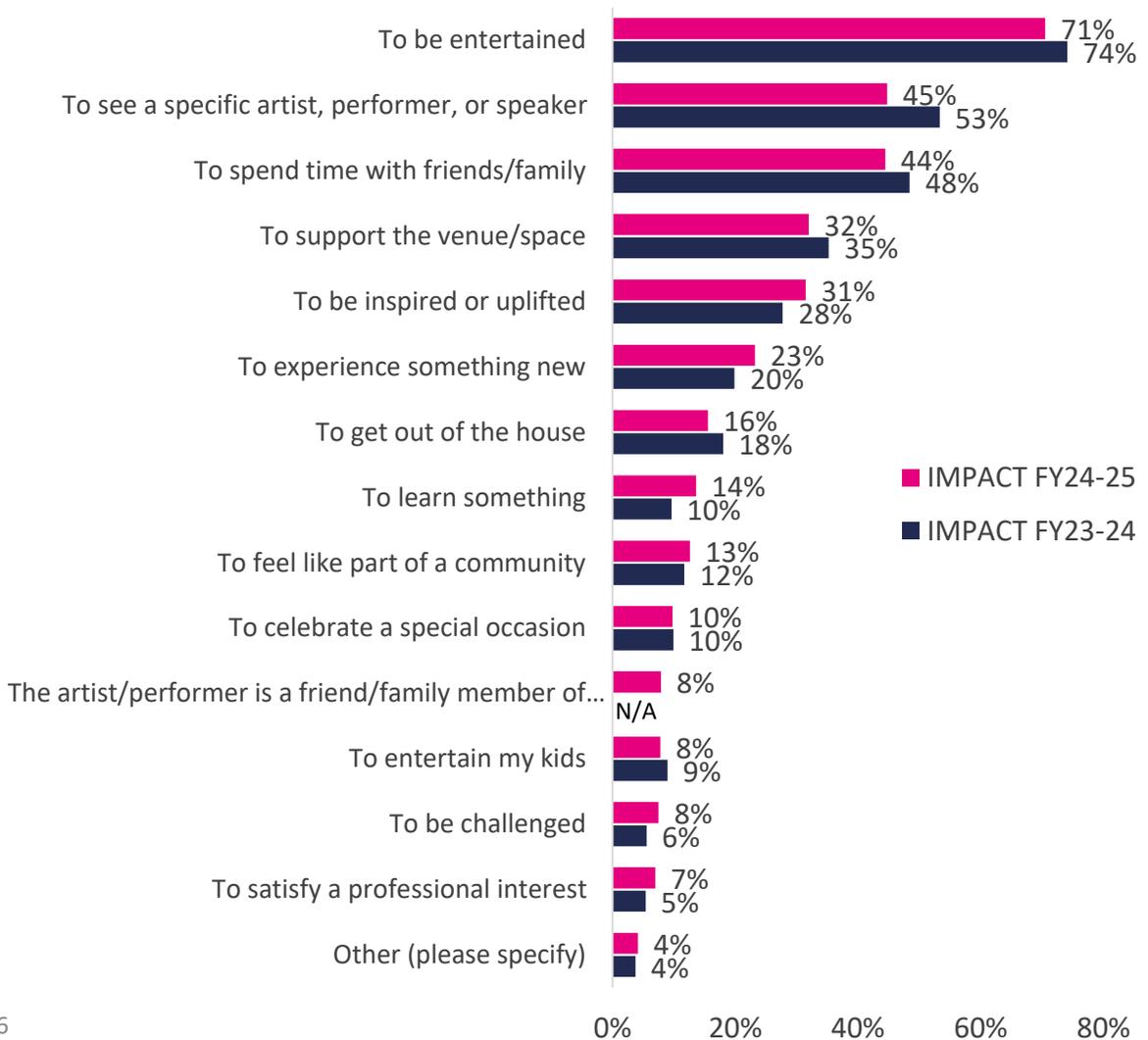
# AUDIENCE MOTIVATIONS



**Audiences attend arts and culture for a whole host of reasons.** When asked to select all of their motivations for attending, more than a third attended for entertainment purposes, to see a specific artist, or to spend time with friends and family. Other motivations were also selected – just under a third (32%) went to support the space/venue or to be inspired/uplifted (31%). Arts and culture is also a motivator for getting people to experience something new, get out of their house, learn something and feel connected to others.

**There were a few differences in overall motivations compared to last year.** Again, we see a smaller portion of people attending to see a specific artist, performer or speaker. Audiences this past year were more likely to attend to be inspired or uplifted, experience something new, or to learn something.

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

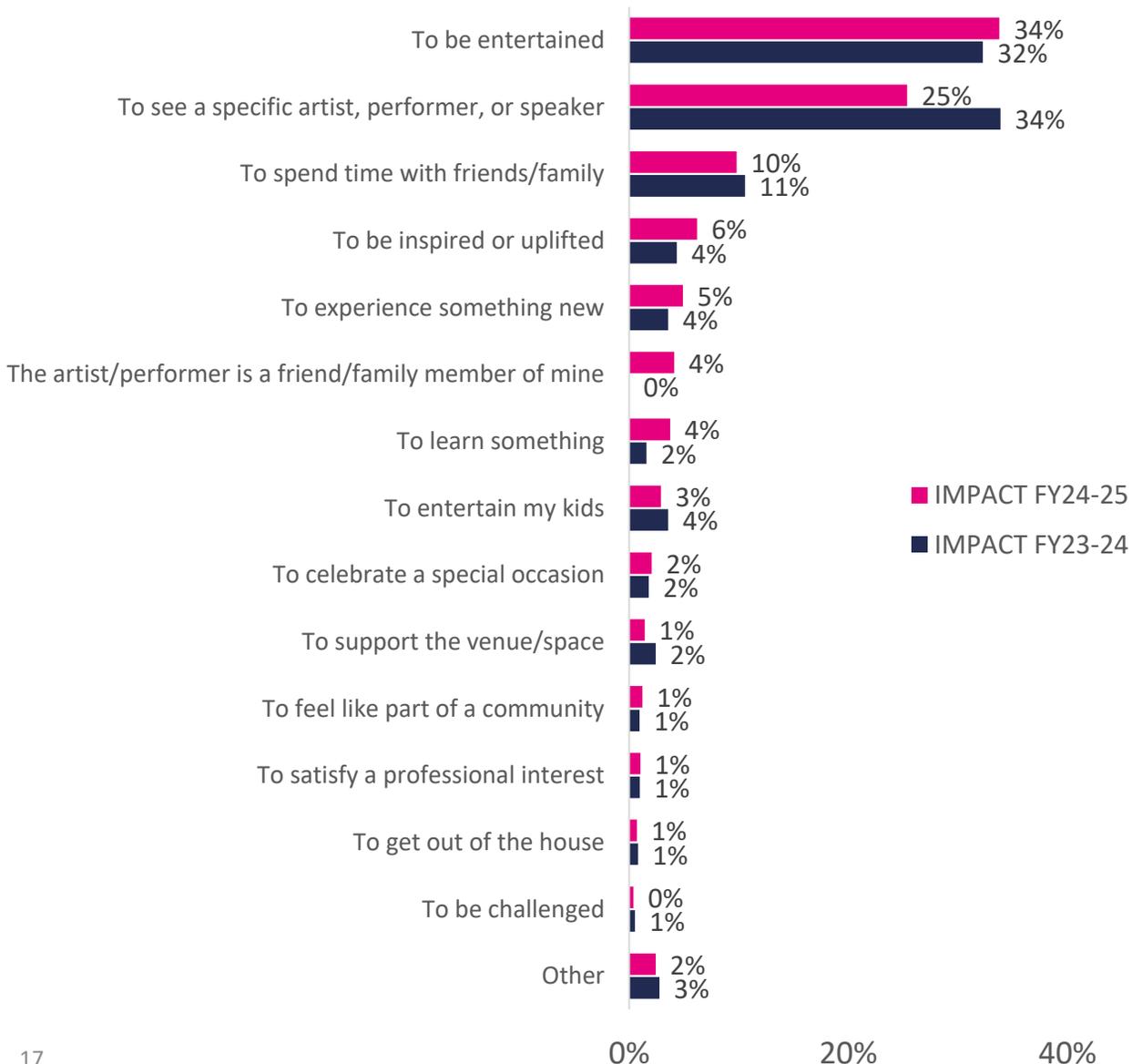


# AUDIENCE MOTIVATIONS

When asked to select their main reason for visiting, two drivers of motivation came through, with over half of all respondents looking to be entertained or to see a specific artist, performer or speaker.

**The drivers of motivation for attending were similar to last year.** In 2023-24, the top drivers of motivation were also to be entertained or to see a specific artist. There was however a decrease this year in attending to see a specific artist (25% this year vs. 34% last year). All other motivations only shifted by 1-2% at most.

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

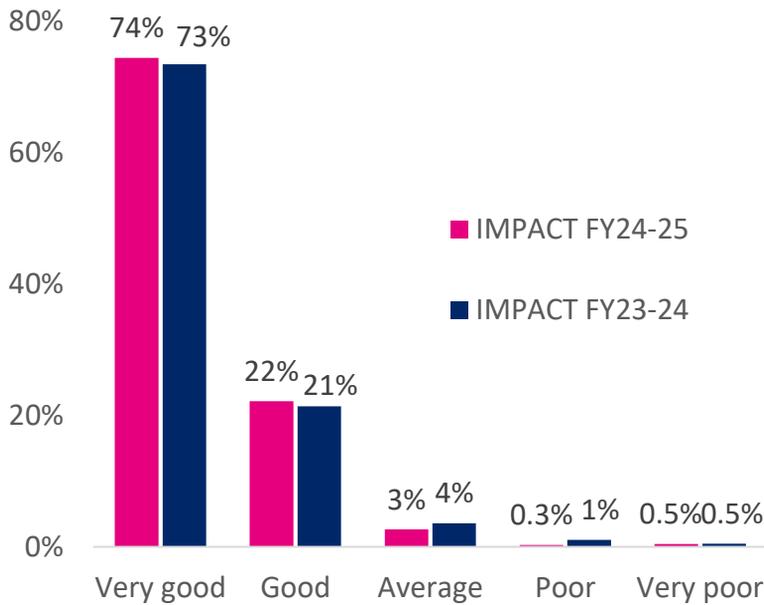


# SECTION 3

# AUDIENCE IMPACT



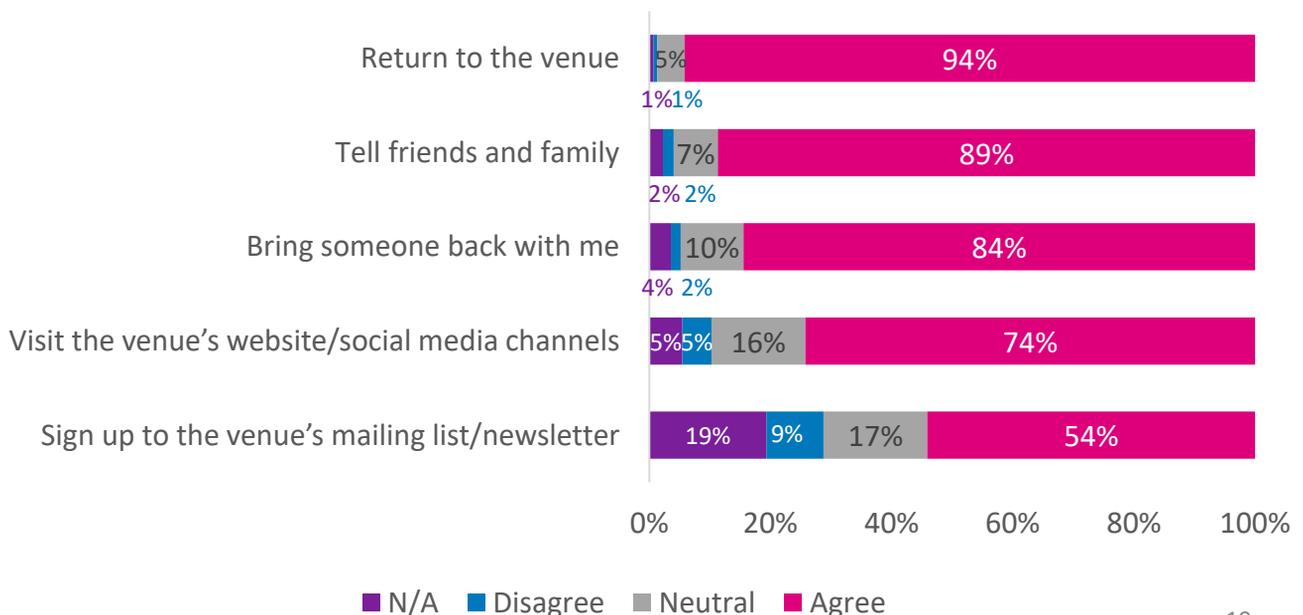
What was your overall experience like?



This year 96% of IMPACT audiences rated their overall experience as good or very good, slightly higher than last year.

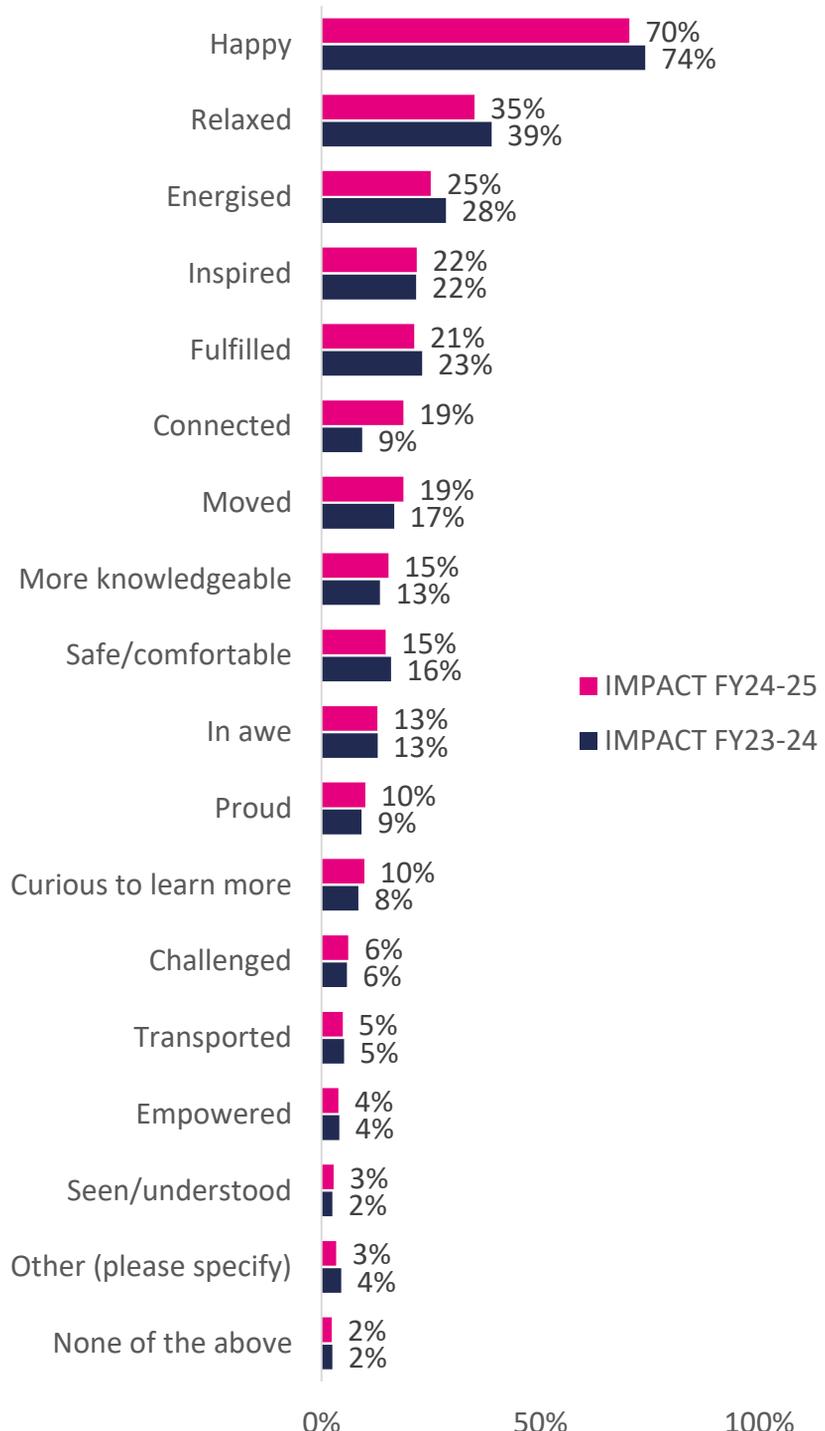
More than 8 in 10 people agree that they would return, tell friends and family and bring someone with them. To a lesser extent, audiences agreed that they would visit the venue’s digital channels (74%) or sign up to their newsletter (54%).

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



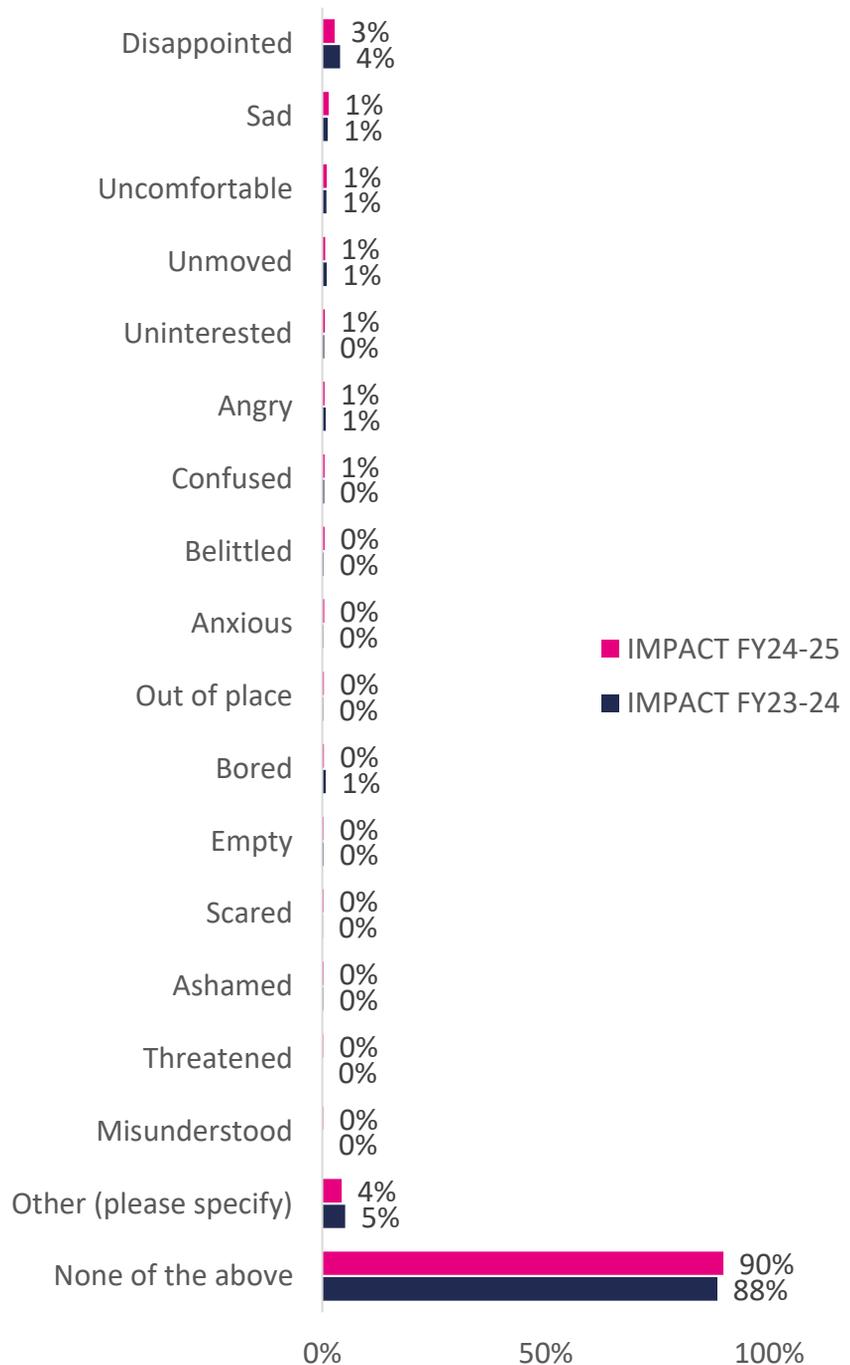
**Most people reported feeling happy after attending.** More than one fifth of audiences also felt relaxed, energised, inspired and fulfilled. A slightly smaller portion of people felt connected (19%), moved (19%), more knowledgeable (15%), and safe and comfortable (15%). In 2024-25, audiences were twice as likely to report feeling connected after attending.

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



**90% of audiences didn't feel a negative emotion after attending.** At most some people reported feeling disappointed, sad, uncomfortable or unmoved after attending something.

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



**Audiences remarked on the atmosphere, community feeling, and enjoyment from attending.** People appreciated the lovely vibes from the venues and staff, mentioned how much they enjoyed their visit, and how arts and culture also provide a welcome escape from daily life.

You rated your overall experience as good or very good. Can you please tell us why?

Theme	Quotes
<p><b>The atmosphere</b></p>	<ul style="list-style-type: none"> <li>• “Great music, great staff, great atmosphere”</li> <li>• “The performances were great and it’s a great place to hang out as a community.”</li> <li>• “Lovely vibe to the space, friendly staff and interesting events within it”</li> <li>• “Performance was great, relaxed atmosphere where we felt comfortable.”</li> <li>• “The ambience of the theatre, the performance of the cast and it was a full house.”</li> <li>• “The main talker was excellent and made everyone feel welcome and included. ”</li> <li>• “Comedian was excellent. Venue was perfect. Atmosphere magic.”</li> </ul>
<p><b>Sense of community</b></p>	<ul style="list-style-type: none"> <li>• “The performances were great and it’s a great place to hang out as a community.”</li> <li>• “The people and community are amazing”</li> <li>• “It was a very special night - a preview of the exhibition and the sense of community, gathering and warmth was exactly what I needed!”</li> </ul>
<p><b>Enjoyment</b></p>	<ul style="list-style-type: none"> <li>• “The craic was great!”</li> <li>• “I love going to the theatre. It's always a mix of entertaining, thought-provoking, uplifting, tears/laughter-inducing, and sometimes all of these in one show.”</li> <li>• “He was brilliant and I danced my wee socks off!”</li> <li>• “V entertaining. Inspiring. Reminded me that although society feels as though it's crumbling, there are so many good people in the world”</li> </ul>
<p><b>Escape</b></p>	<ul style="list-style-type: none"> <li>• “Very good had the best time .My husband had lost his mum 2 months before so was great to escape from everyday life”</li> <li>• “Whatever life throws at you this event venue always gives me a lift”</li> </ul>

**Audiences also mentioned the great talent, a fantastic overall experience, and elements outside of the venue.** People were impressed with the level of skills, and one mentioned a performance “well worth the 120-mile journey”. Many wrote about multiple elements contributing to a great experience, including helpful staff, well-organised events, warm welcomes and clean toilets. People even went so far as to mention elements outside of the venue that contributed to a lovely day out, including naming good restaurants nearby and citing hotel stays in the local area. This suggests external factors that contribute to a memorable experience.

You rated your overall experience as good or very good. Can you please tell us why?

Theme	Quotes
<b>Talent of the artists/performers</b>	<ul style="list-style-type: none"> <li>• “The music was interesting and beautiful and the performers were excellent.”</li> <li>• “The play was absolutely superb, brilliant writing and great acting”</li> <li>• “There was a wide variety of talented local artists, of which some explained the depth of their work.”</li> <li>• “High level of skill of dancers”</li> <li>• “Excellent performance well worth the 120 mile journey.”</li> </ul>
<b>Their visit as the ‘whole package’</b>	<ul style="list-style-type: none"> <li>• “Always a warm welcome, excellent facilities and an outstanding performance”</li> <li>• “Friendly, helpful staff. Super venue - you can see the stage from every seat. Great choice and range of shows.”</li> <li>• “Pleasant staff, comfortable theatre and excellent comedy show”</li> <li>• “Fab venue , great weather and great company . Well organised . Plenty of spotless toilets”</li> <li>• “From booking tickets to being looked after at the venue”</li> <li>• “Great show. Well organised. Friendly staff. Lovely venue. Easy walking distance to train station.”</li> </ul>
<b>Mentions of food/drink nearby</b>	<ul style="list-style-type: none"> <li>• “Enjoyed the play a lot. The meal nearby in Hendrix was excellent. ”</li> <li>• “Stayed in lovely hotel and concert was very good”</li> <li>• “A great venue and the entertainment did not disappoint this combined with a nice meal was a good night out. ”</li> <li>• “Very professional performance and lovely meal afterwards in Villa Italia. ”</li> </ul>

**Audiences also mentioned access in the form of family-friendly events and staff assistance.** There were several mentions of events being great for all ages, and one person commented about a lovely night and “With 2 kids under 4, a night out for us is rare”. Others commented on how helpful the staff were for disabled audiences.

**Poor experiences were centred around a variety of reasons.** There were some mentions of improvement to sound levels, price/variety of food and drinks, event logistics and a need for additional communication. Because most IMPACT respondents had a positive overall experience, only 15 responses were given to this question.

You rated your overall experience as good or very good. Can you please tell us why?

Theme	Quotes
<p><b>Family friendly</b></p>	<ul style="list-style-type: none"> <li>• “We just have a brilliant evening. With 2 kids under 4, a night out for us is rare. We had a gorgeous meal with drinks at Edo and then wandered across to the concert”</li> <li>• “Child was engaged and excited to meet his hero from tv”</li> <li>• “Location was perfect. Panto was amazing! Family friendly and hilariously funny for all ages. ”</li> <li>• “The event was funny, entertaining and suitable for children of all ages, most of all my grandchildren really had a great time and that to me was most important.”</li> </ul>
<p><b>Staff assistance</b></p>	<ul style="list-style-type: none"> <li>• “I’m disabled and walk with the aid of crutches, the staff are very kind and considerate”</li> <li>• “I’m a teenage wheelchair user and the staff made me feel welcome and were very helpful”</li> <li>• “Didn’t get to see the performance because of SEN child, but husband said it was good. We were well looked after and supported by the venue”</li> </ul>

# SECTION 4

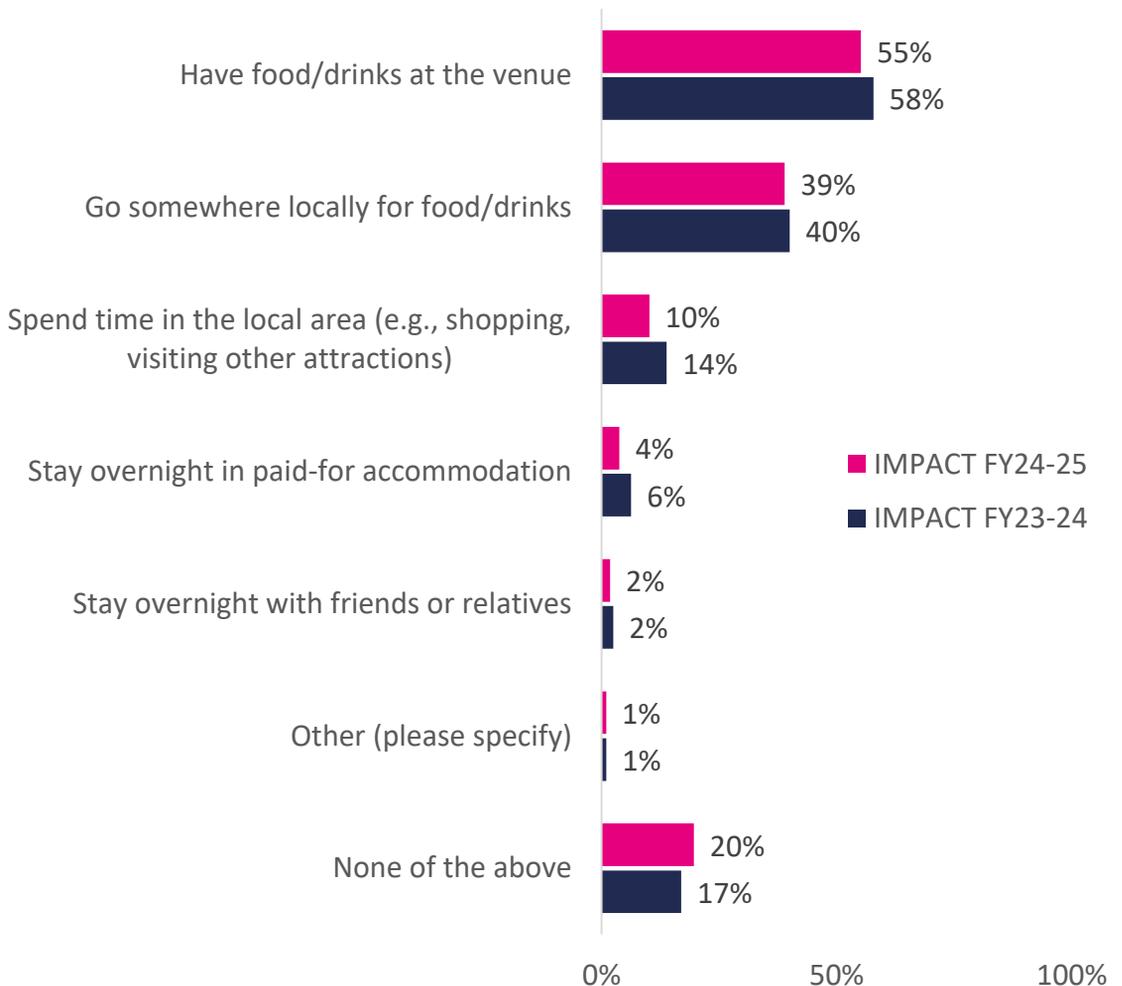
# ECONOMIC IMPACT



**Arts and culture has a direct economic impact on the local area.** Over half of audiences had food or drinks at the venue itself (55%), and 39% went somewhere locally for food/drinks. Furthermore, 10% spent time in the local area and 4% stayed overnight in paid-for accommodation.

**However, audiences were less likely to do other things as part of their visit this year.** In 2024-25, people were less likely to get food/drinks at the venue, less likely to spend time in the local area and stay in paid-for accommodation compared to 2023-24.

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



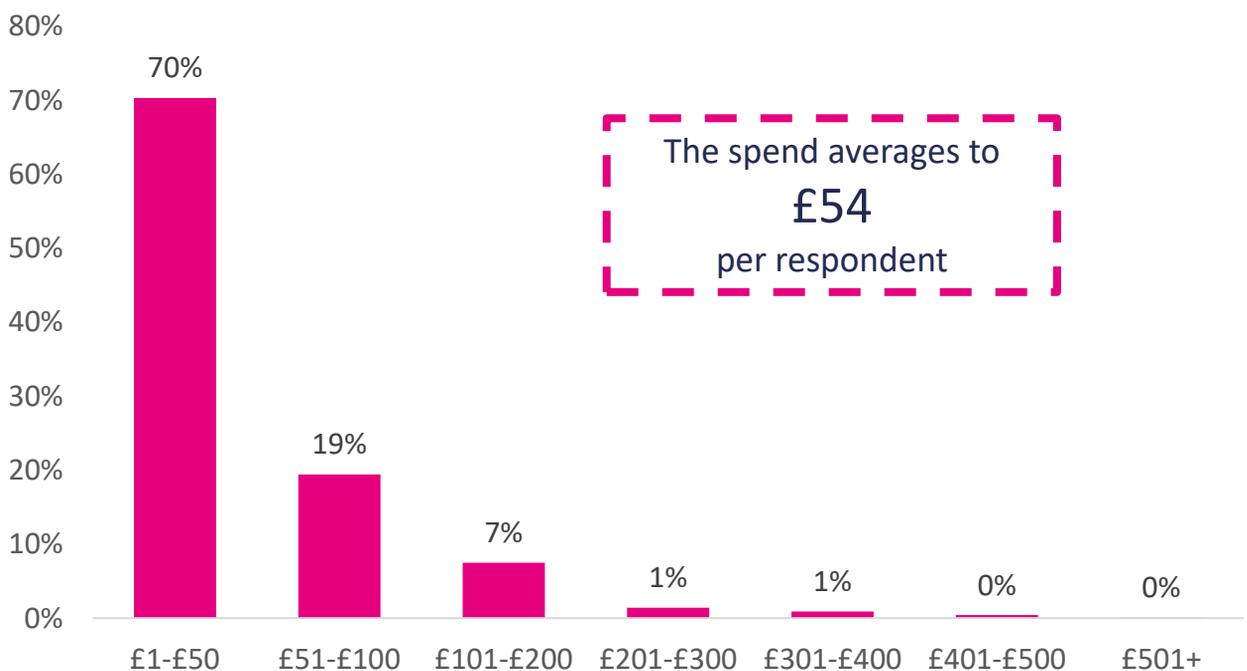
**In 2024-25, IMPACT respondents brought in over £91k in additional spend.** In addition to purchasing tickets, IMPACT audiences spent £91,644 on additional items. This includes food/drinks in and outside the venue, money spent in the local area, and money spent on paid accommodation.

**On average, IMPACT audiences spent £54 per party.** This can include people who attended alone or with a group. The majority of people who gave a response (70%) spent less than £50.



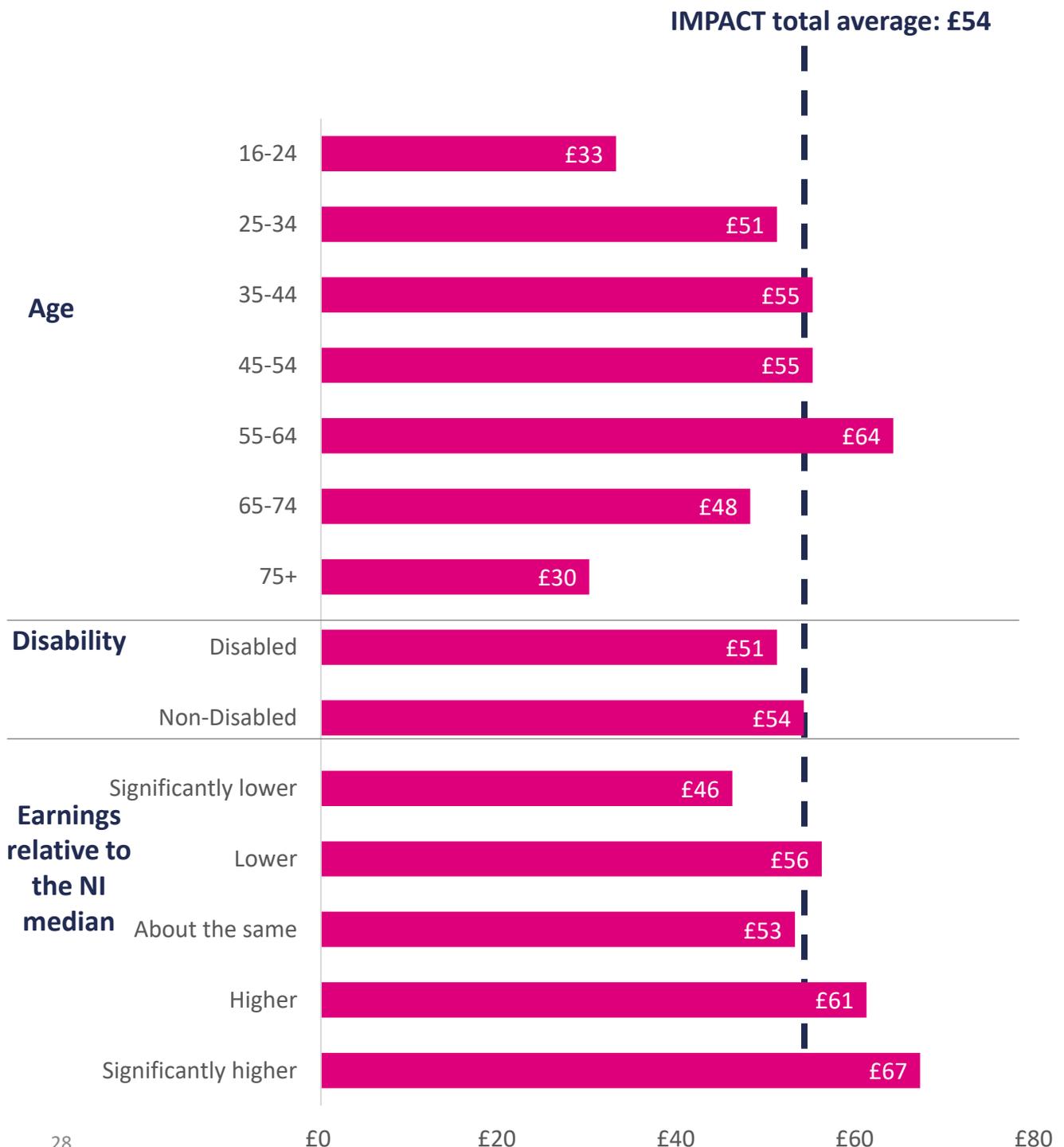
**£91,644**  
Was spent across 1,698 respondents

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?



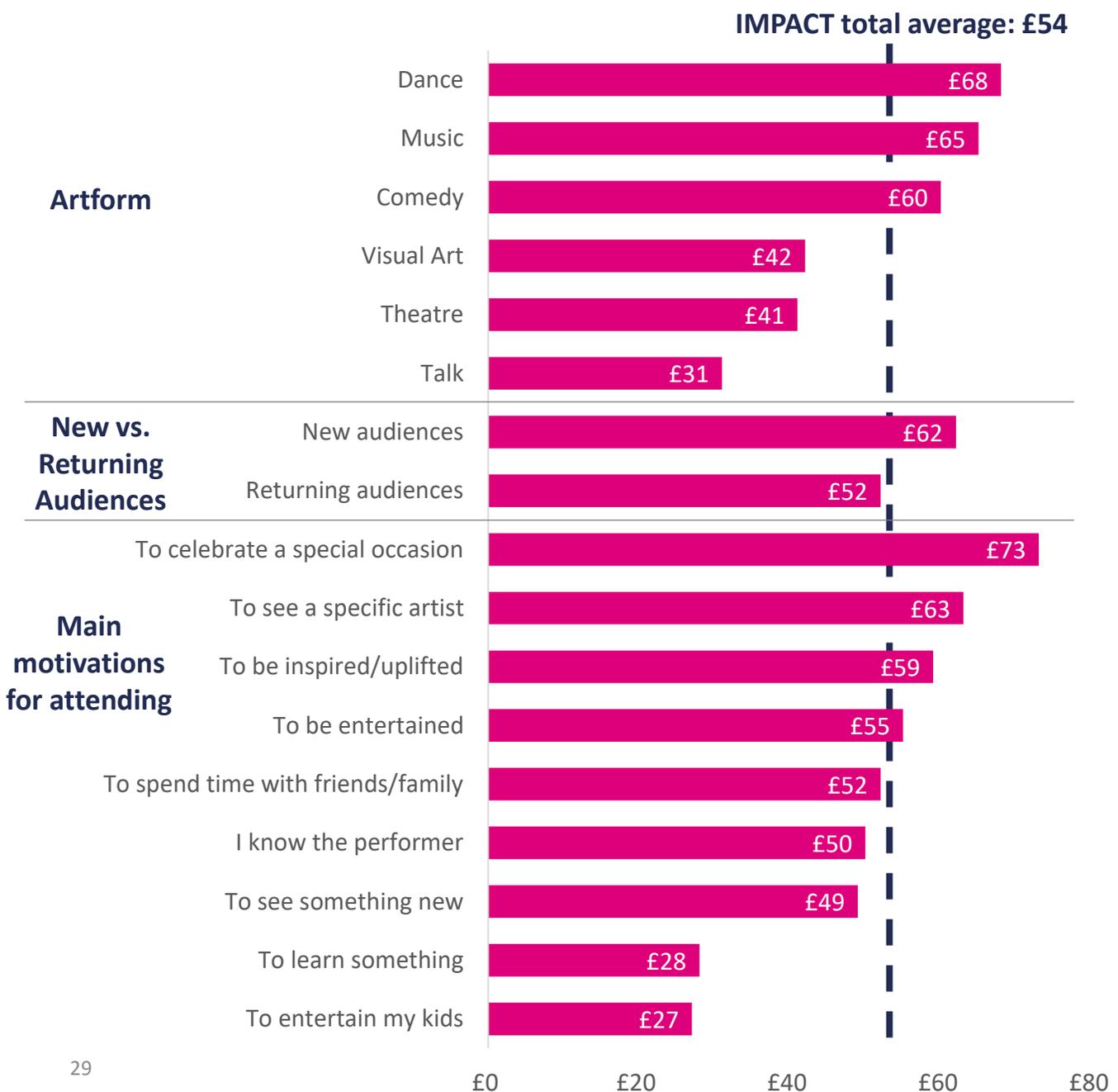
**Average spend varies by age, disability and income.** Younger audiences aged 16-34, disabled audiences, and those on significantly lower incomes were spending less on average compared to the total.

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?



**Average spend also differs by artform, audience type, and motivations.** Those attending dance, music, or comedy performances had higher spend on average compared to the total. New audiences to a venue had higher spend on average compared to returning audiences. The highest average spend was among people whose main motivation was to celebrate a special occasion, followed by those attending to see a specific artist or to be inspired/uplifted.

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?

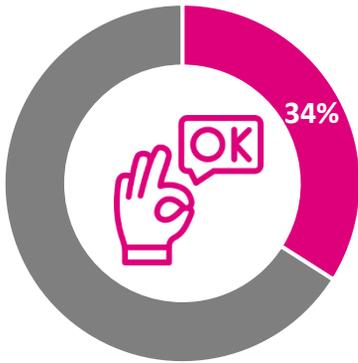


# SECTION 5

## COST OF LIVING



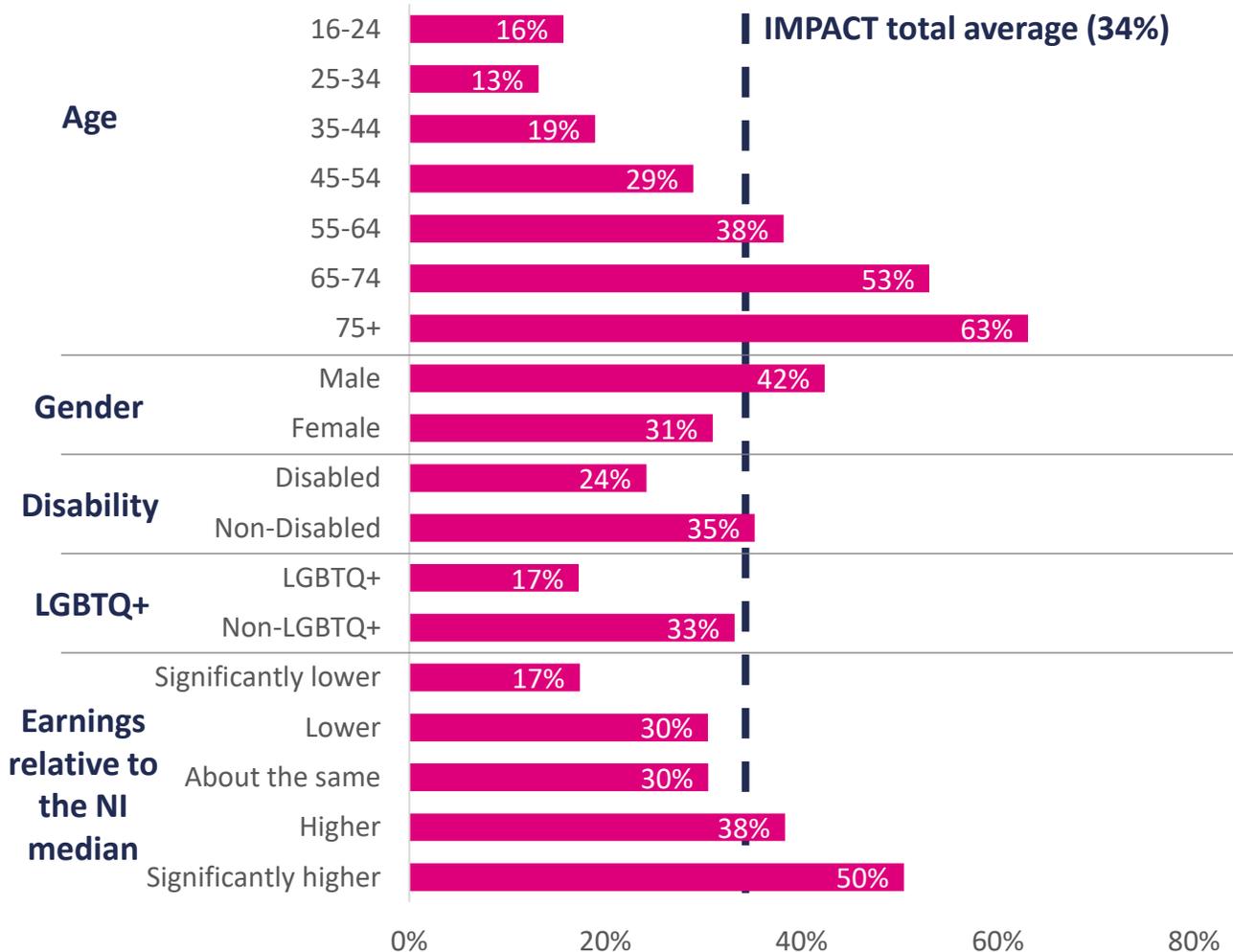
“The cost of living doesn’t have an impact on my arts/culture experiences”



**Roughly a third of audiences say the cost of living doesn’t affect their arts and culture experiences.** However, certain demographics are more comfortable than others when it comes to cost of living

**Older people aged 65+, men, non-disabled audiences and those on higher incomes are more likely to say the cost of living doesn’t have an impact on their arts/culture experiences.** Conversely, those affected most by the cost of living are audiences who are younger (16-44), female, disabled, LGBTQ+, and people on lower incomes.

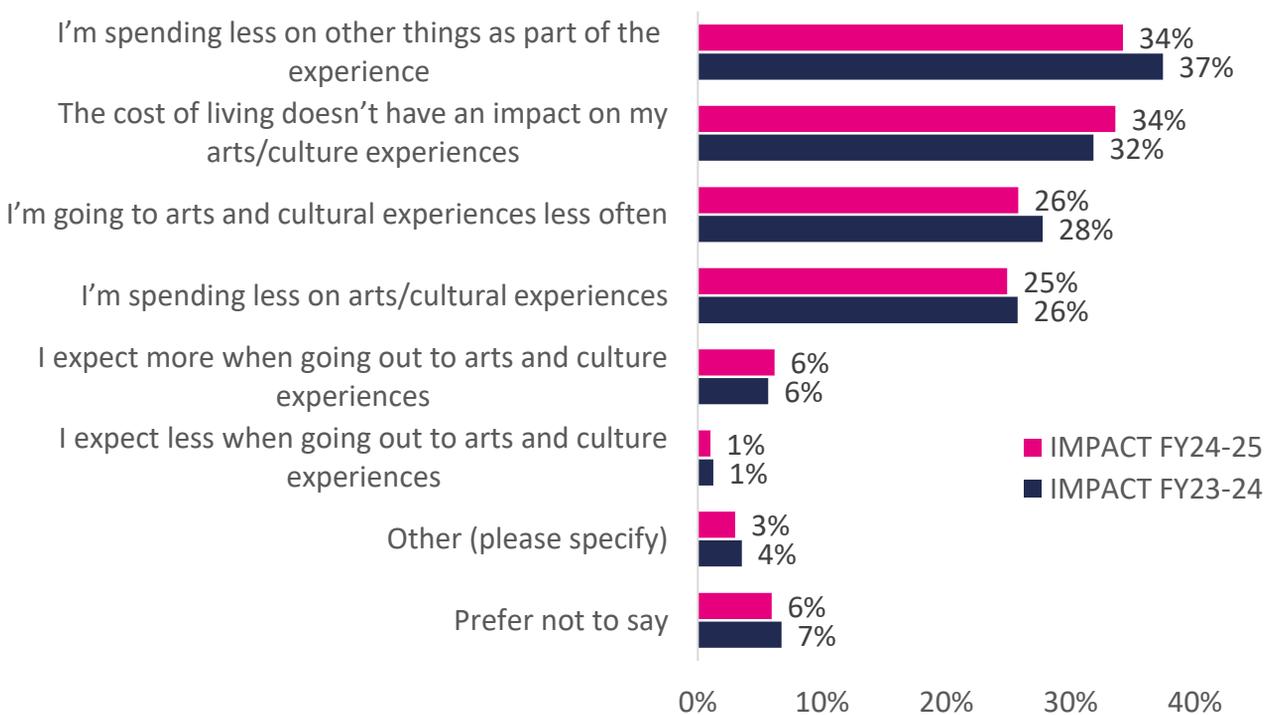
“The cost of living doesn’t have an impact on my arts/culture experiences”  
(% selecting this answer)



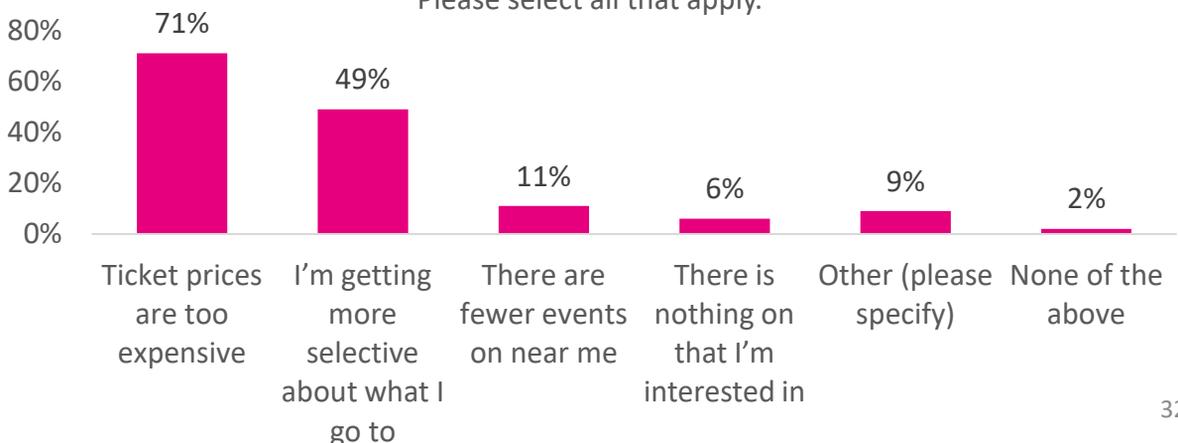
**Those who are affected by the cost of living are cutting back in specific ways.** This includes a third (34%) who are cutting back on ancillary spend, and a quarter (26%) going to things less often and a quarter (25%) spending less on the experiences themselves.

**Audiences this year are slightly less likely to report the negative impact of cost of living on their arts and culture behaviours.** There was between a 1-3% difference this year, with 34% of audiences cutting back on ancillary spend, 26% cutting back on frequency of attendance, and 25% spending less on the experiences themselves.

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



You mentioned that you are going to arts and cultural experiences less often. Are any of the following reasons why you are going less often?  
Please select all that apply.



## SECTION 6

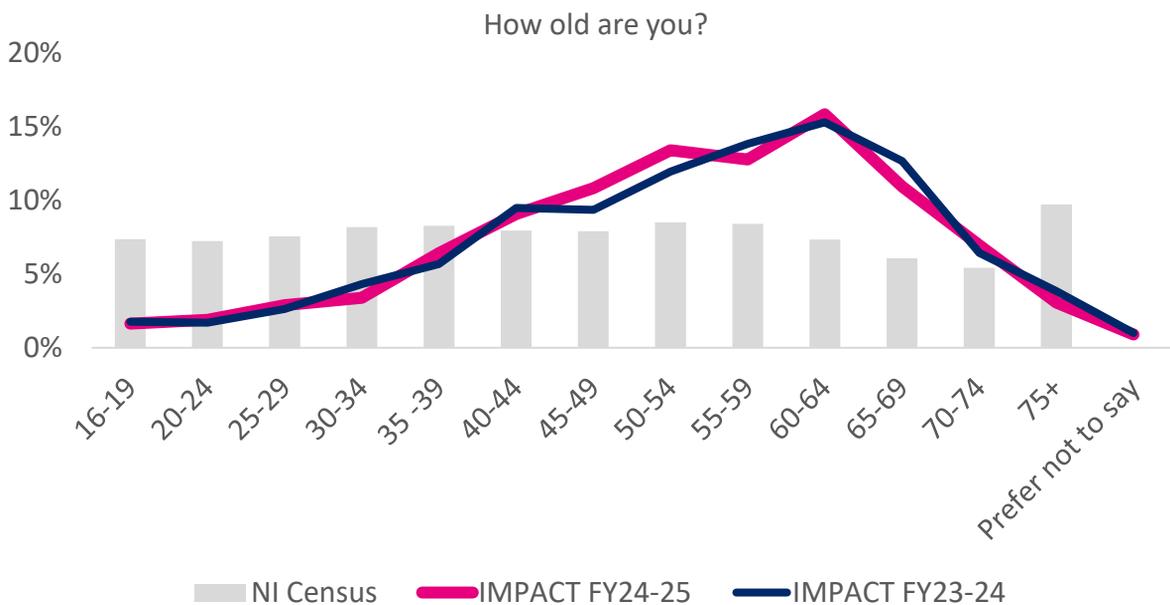
# AUDIENCE DEMOGRAPHICS



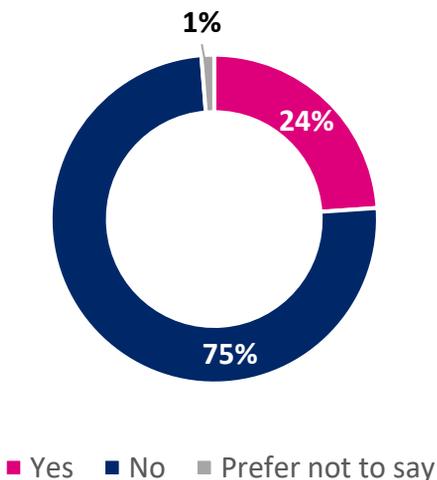
WHAT TYPE OF PEOPLE ATTEND ARTS AND CULTURE IN NORTHERN IRELAND?

The age breakdown remains similar to the previous year. Most IMPACT audiences continue to be between the ages of 40 and 74—a higher proportion than is reflected in the general NI population, according to the Census.

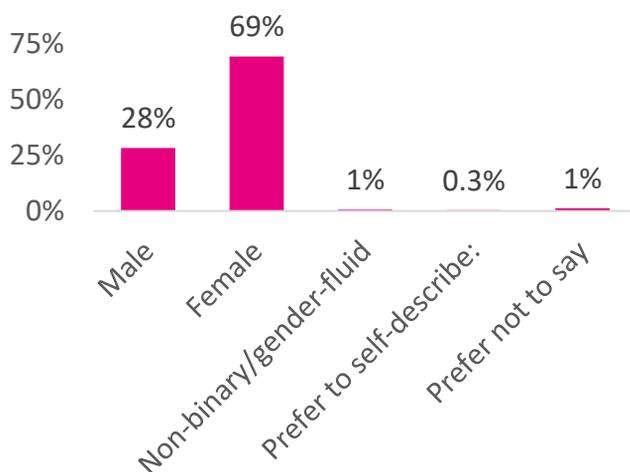
A quarter of IMPACT audiences have children in the household. This data remained the same as the previous year of IMPACT. IMPACT continues to draw more responses from women than men - 69% of IMPACT responses were from women in FY24-25, which is the same as that found in the previous year’s report.



Do you have children under 16 living with you?



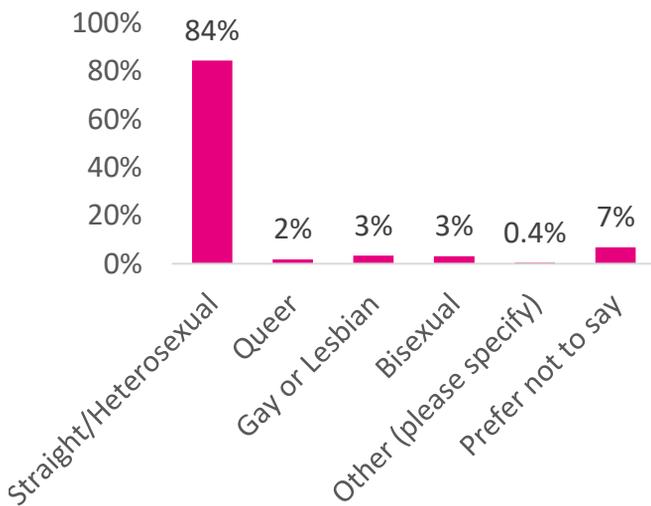
Which of the following best describes you?



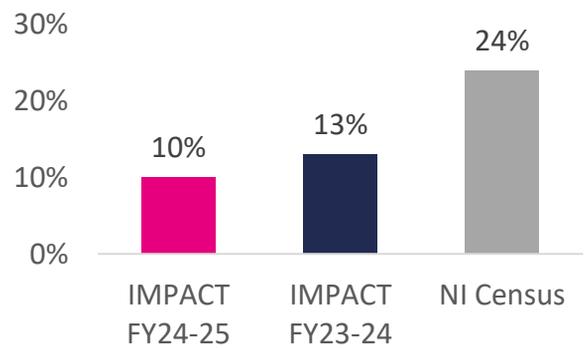
IMPACT audiences are more likely to identify as LGBTQ+ compared to the NI Census. In FY24-25, 8% of audiences identified as LGBTQ+, which is an increase of 3% from the previous year. **Compared to the NI Census, IMPACT audiences are four times as likely to be LGBTQ+ (8% IMPACT vs. 2% NI Census).**

**One in ten IMPACT respondents are disabled.** This is lower in FY24-25 compared to the previous year (13%) and is much lower compared to the NI Census (24%\*). Of those with a disability, half were mobility impaired or physically disabled.

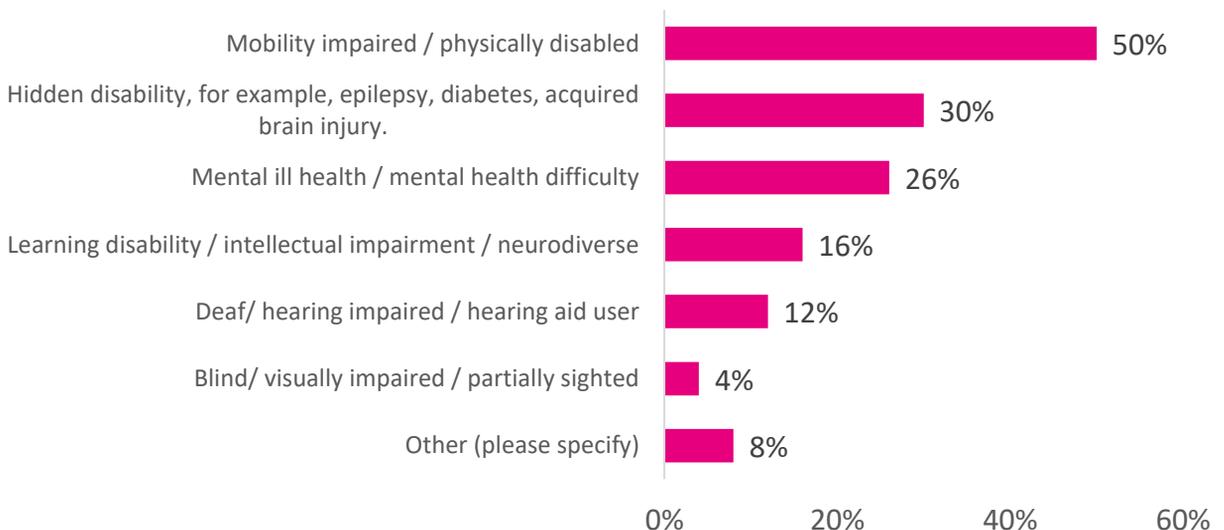
Which of the following best describes your sexual orientation?



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



What is the nature of your disability? (You can select more than one)

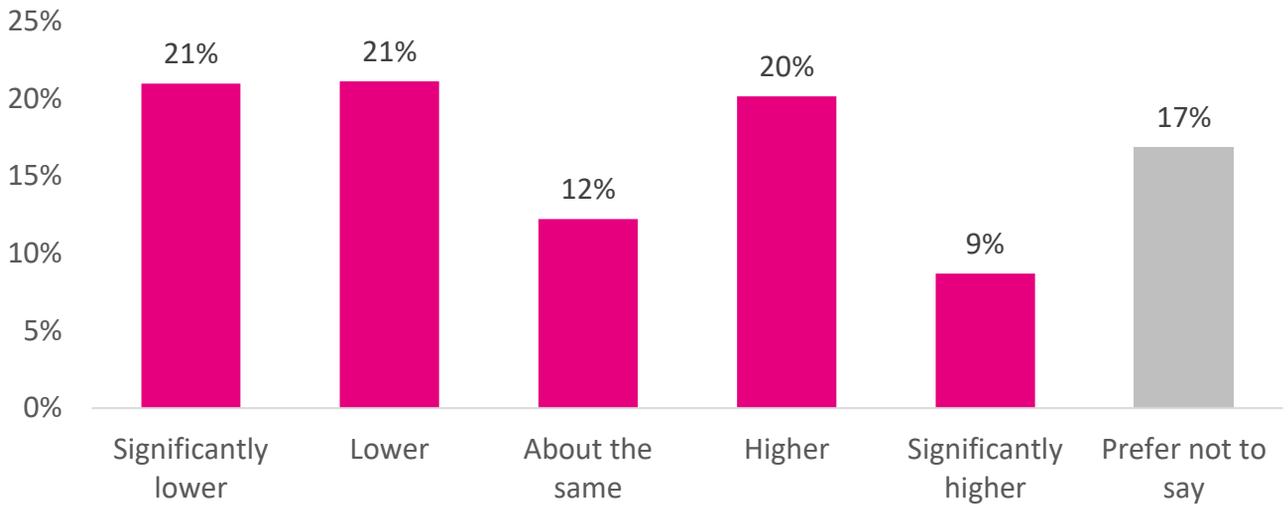


\*The NI Census asks disability in two parts: “Do you have any physical or mental health conditions or illnesses lasting or expected to last 12 months or more?” (Yes/No) Those who answered yes were asked “Do any of your conditions or illnesses reduce your ability to carry out day-to-day activities?” (Yes, a lot; yes, a little; not at all.).

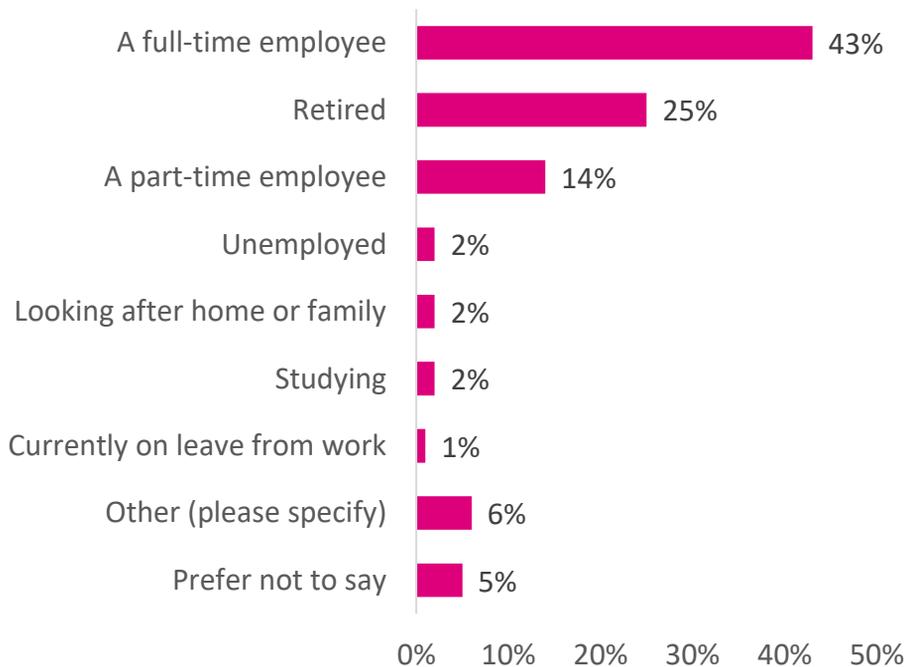
**Income distribution among audiences is lop-sided.** 42% of audiences reported having incomes lower than the median, while 29% reported having earnings higher than the median.

Over half (58%) of audiences are in full or part-time employment. A quarter of audiences (25%) are retired. Collectively, 7% are economically inactive and are either unemployed, looking after home or family, studying, or on leave from work.

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

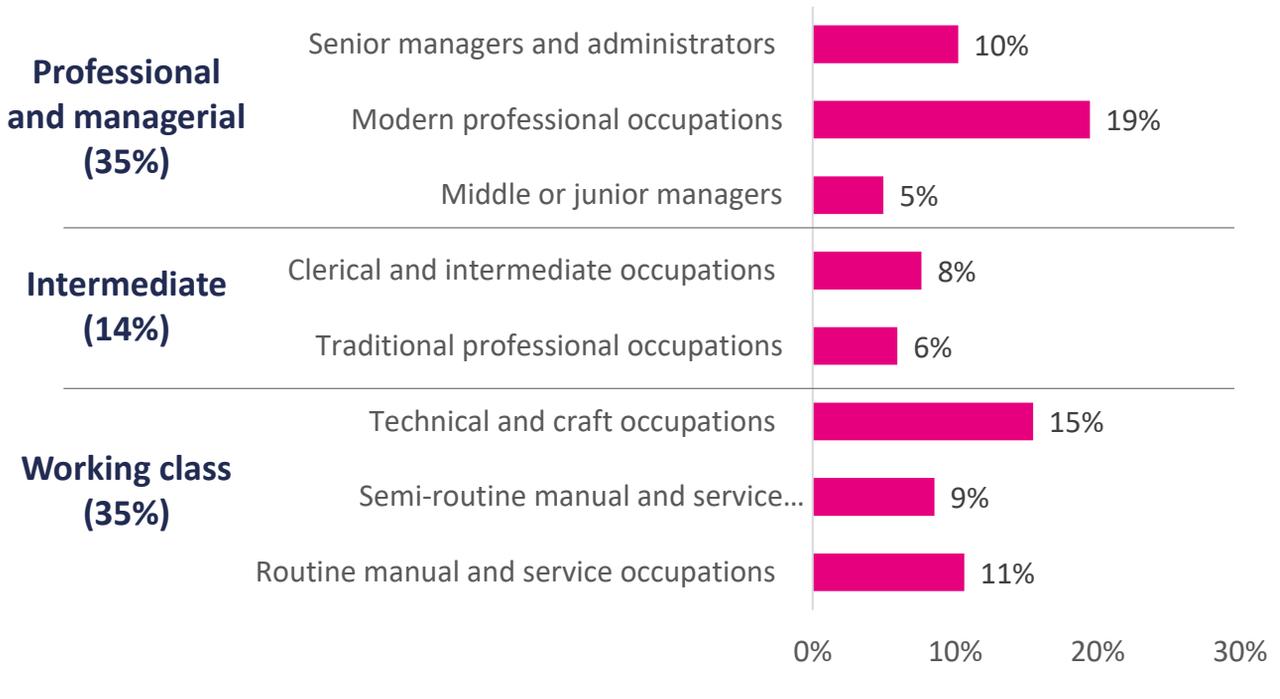


Are you:

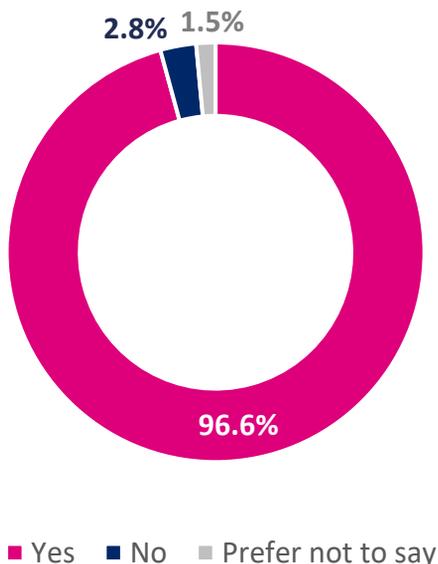


**Arts and culture aren't just for upper class audiences.** Working class audiences make up the same percent of people in IMPACT as those in professional and managerial jobs (35%). 2.8% of people said English wasn't their first language. This is lower than the NI Census (4.6%). Younger audiences and people on lower earnings were less likely to have English as a first language.

Thinking back to when you were aged about 14, which best describes the sort of work the main/highest income earner in your household did in their main job?



Is English your first language?



**Other languages included:**

- Arabic
- Cantonese/Chinese
- Dutch
- French
- Gaeilge/Irish
- German
- Hungarian
- Italian
- Lithuanian
- Malayalam
- Polish
- Portuguese
- Serbian
- Swahili
- Swedish

## SECTION 7

# GEOGRAPHY AND DEPRIVATION

ROLLUP OF 2 YEARS OF IMPACT



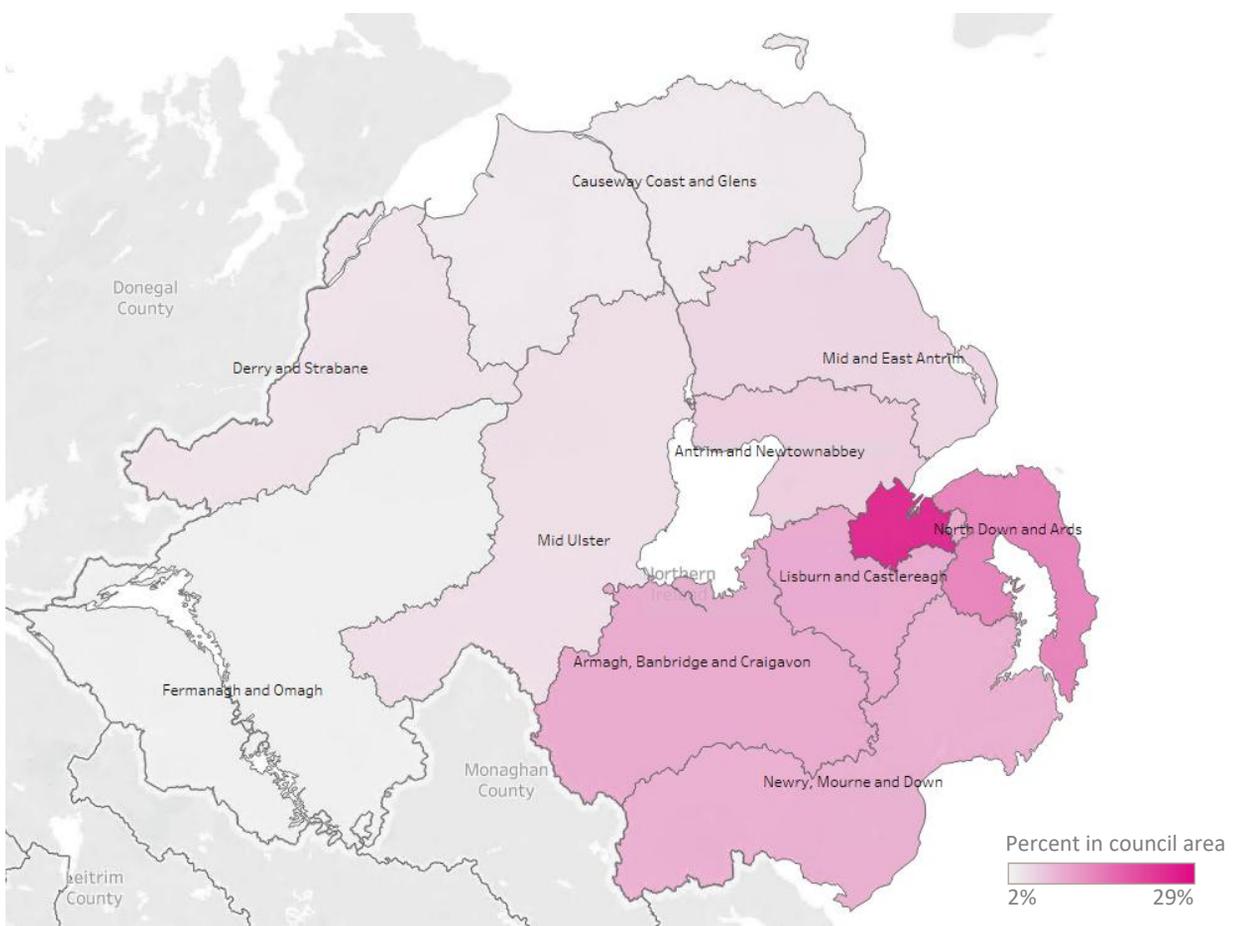
# GEOGRAPHY AND DEPRIVATION

WHERE DO AUDIENCES LIVE, AND WHAT ARE THEIR DEPRIVATION LEVELS LIKE?

	% of all IMPACT responses (FY23-24 and 24-25)
Belfast	29%
Ards and North Down	16%
Lisburn and Castlereagh	11%
Armagh, Banbridge and Craigavon	11%
Newry, Mourne and Down	10%
Antrim and Newtownabbey	6%
Mid and East Antrim	5%
Mid Ulster	4%
Derry and Strabane	3%
Causeway Coast and Glens	3%
Fermanagh and Omagh	2%

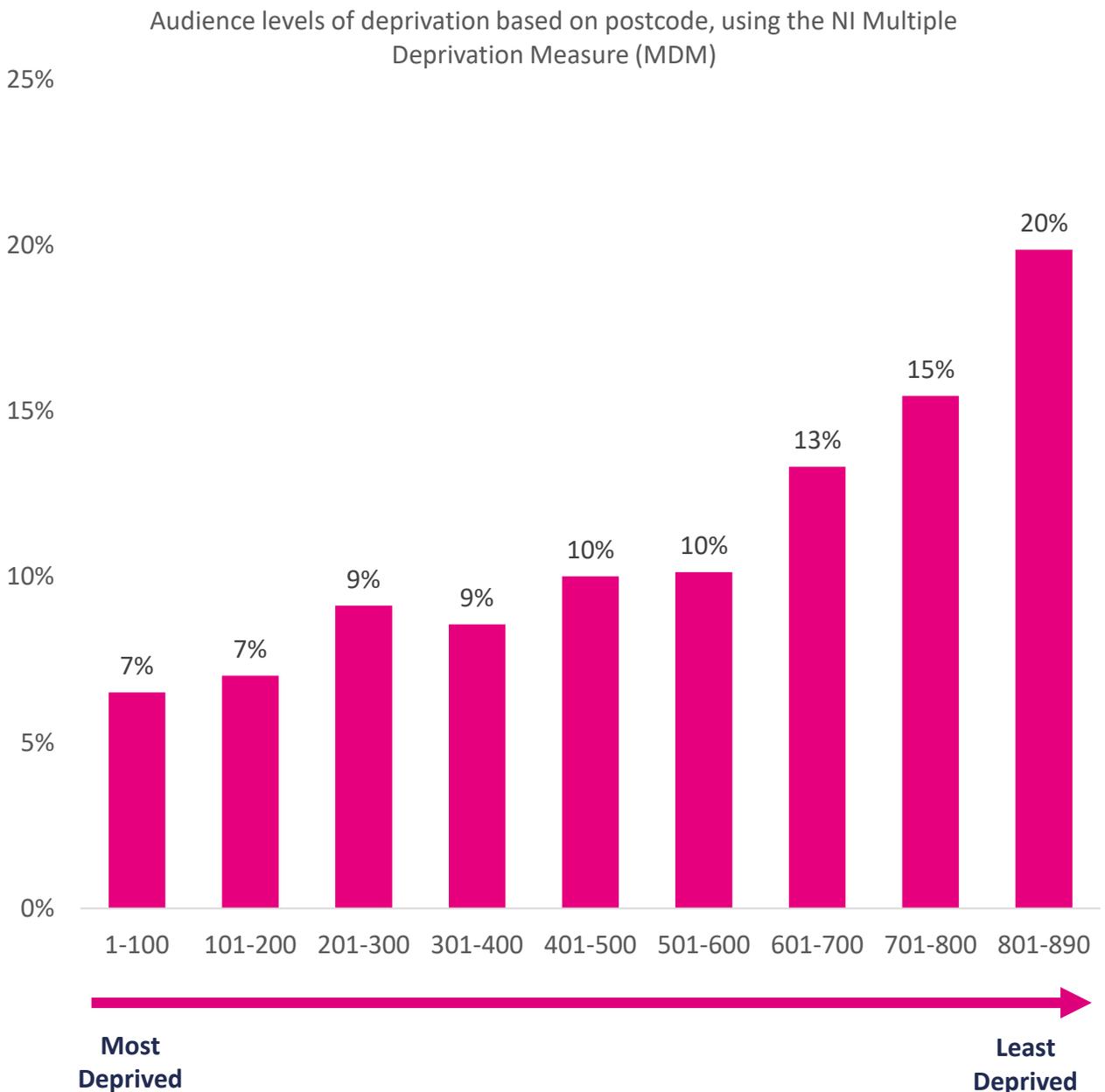
**Most IMPACT audiences are from Belfast and surrounding areas.** 29% of respondents came from Belfast, followed by Ards and North Down (16%), Lisburn and Castlereagh (11%), Armagh City, Banbridge and Craigavon (11%), and Newry, Mourne and Down (10%). The data is likely driven by the arts and culture organisations participating in IMPACT, of which the majority are from Belfast.

Map of responses by council area



## GEOGRAPHY AND DEPRIVATION

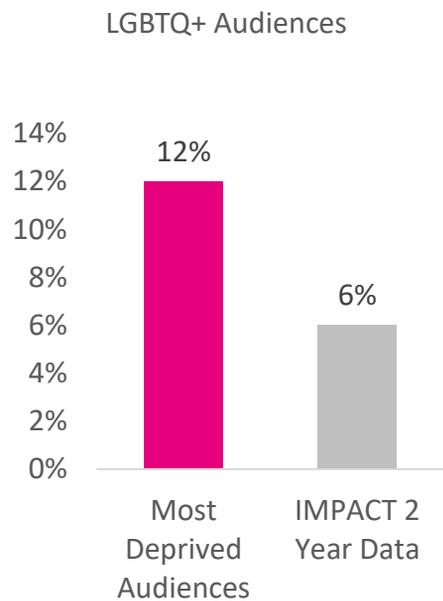
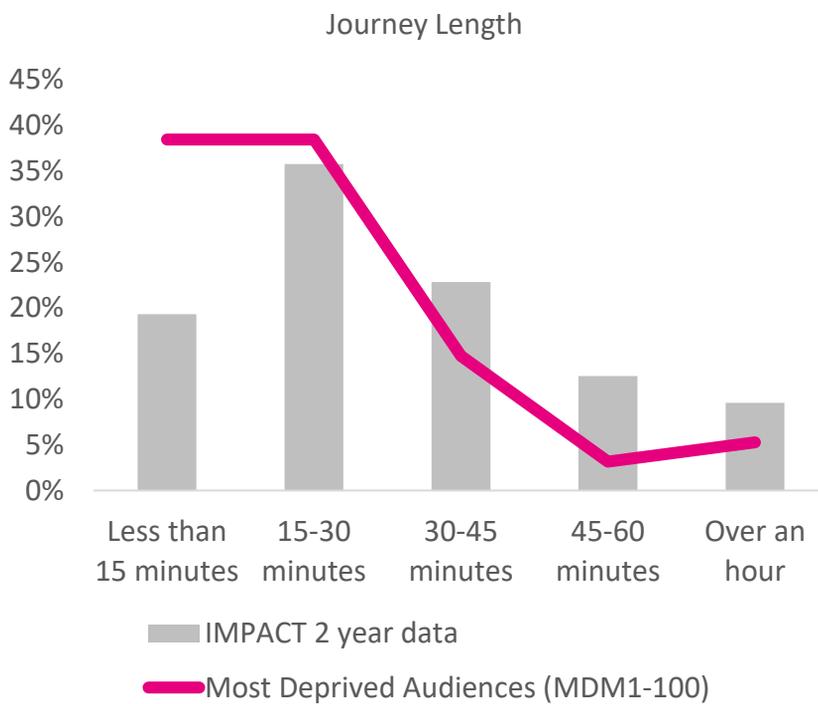
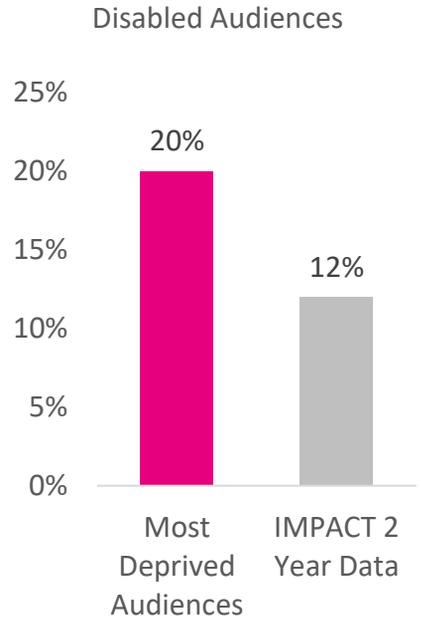
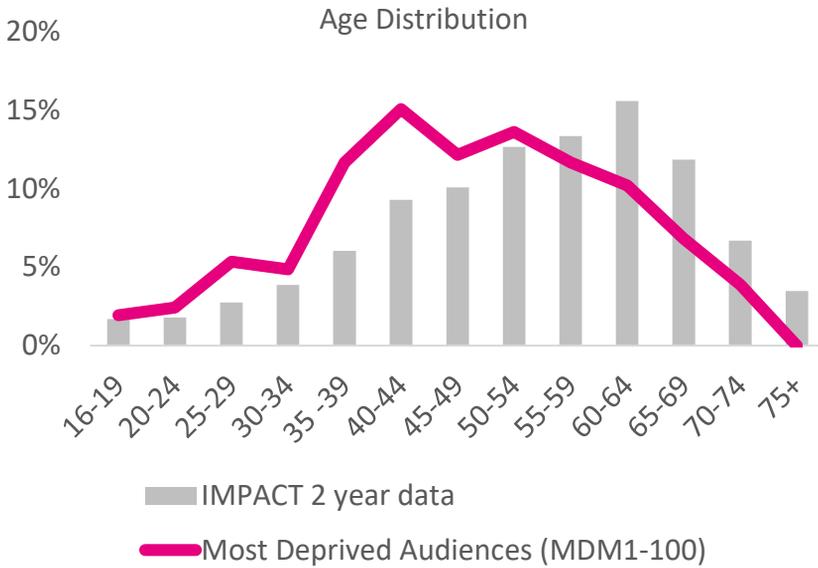
**Arts and culture are attracting audiences from across all levels of deprivation.** We matched up audience postcodes to the NI Super Output Areas (SOAs). All SOAs are ranked from 1-890 in terms of deprivation. For this report, we are using the Multiple Deprivation Measure ranking, which combines different types of deprivation including income, crime, safety, etc. You can read more about it [here](#). While there are more audiences coming from the least deprived areas (MDM rank of 801-890), people are coming from ALL levels of deprivation, including from the most deprived areas (rank 1-100). This illustrates how arts and culture aren't just for the privileged.



# AUDIENCES IN THE MOST DEPRIVED AREAS

HOW DO THEY DIFFER FROM THE IMPACT TOTAL AVERAGE ACROSS THE TWO YEARS OF RESEARCH?

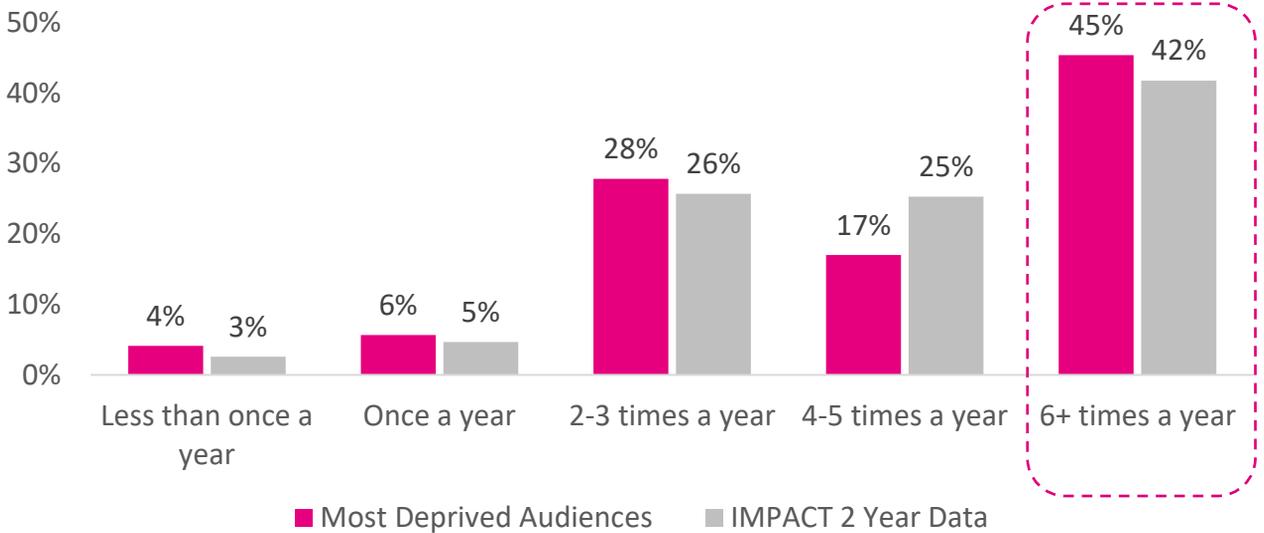
Those living in Northern Ireland’s most deprived areas (MDM 1-100) differ from the IMPACT total. They are **younger**, nearly twice as likely to be **disabled**, twice as likely to be **hyper-local** to the venue, and twice as likely to be **LGBTQ+** audiences compared to the IMPACT total.



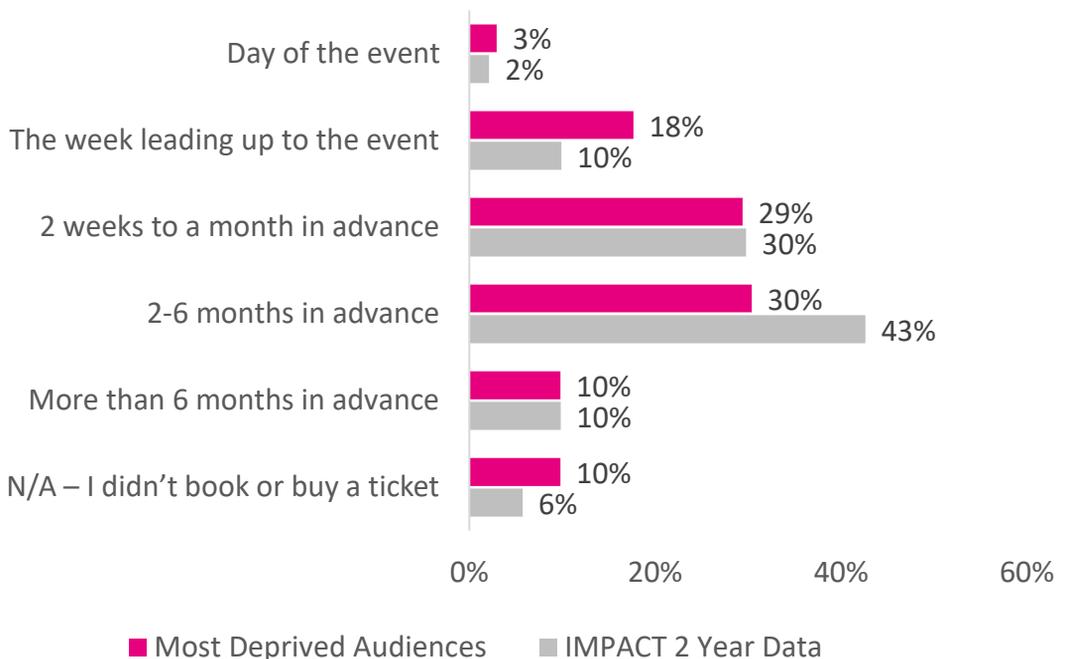
# AUDIENCES IN THE MOST DEPRIVED AREAS

Those living in the most deprived areas had different booking and engagement patterns compared to the total average. Audiences living in the most deprived areas of Northern Ireland only had slight differences compared to the IMPACT 2-year total, with 45% engaging in arts and culture 6+ times a year (3% higher than the total). So, while there are fewer of these people (7% of respondents), they are engaging in arts and culture very frequently, more often than the total. These audiences are more likely though to be booking tickets last minute (the day/week of the event) or didn't book/buy a ticket at all.

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



When did you book your ticket? Please select one.



## AUDIENCES IN THE MOST DEPRIVED AREAS

**Main motivations for these audiences also differ.** Those living in the most deprived areas of Northern Ireland were more likely to attend something for social reasons – to spend time with friends/family or to entertain their kids. Compared to the total, they were less likely to attend something to see a specific artist.

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

	Most Deprived Audiences	IMPACT 2 Year Data	Difference
To be entertained	34%	33%	1%
To see a specific artist, performer, or speaker	24%	30%	-5%
To spend time with friends/family	14%	10%	4%
To entertain my kids	6%	3%	3%
To experience something new	5%	4%	1%
To be inspired or uplifted	4%	5%	-1%
To feel like part of a community	3%	1%	2%
To support the venue/space	3%	2%	1%
To learn something	2%	3%	-1%
To celebrate a special occasion	1%	2%	-1%
The artist/performer is a friend/family member of mine	1%	2%	-1%
To be challenged	1%	0%	0%
To get out of the house	0%	1%	-1%
To satisfy a professional interest	0%	1%	-1%



# SECTION 8

## WHAT'S CHANGED

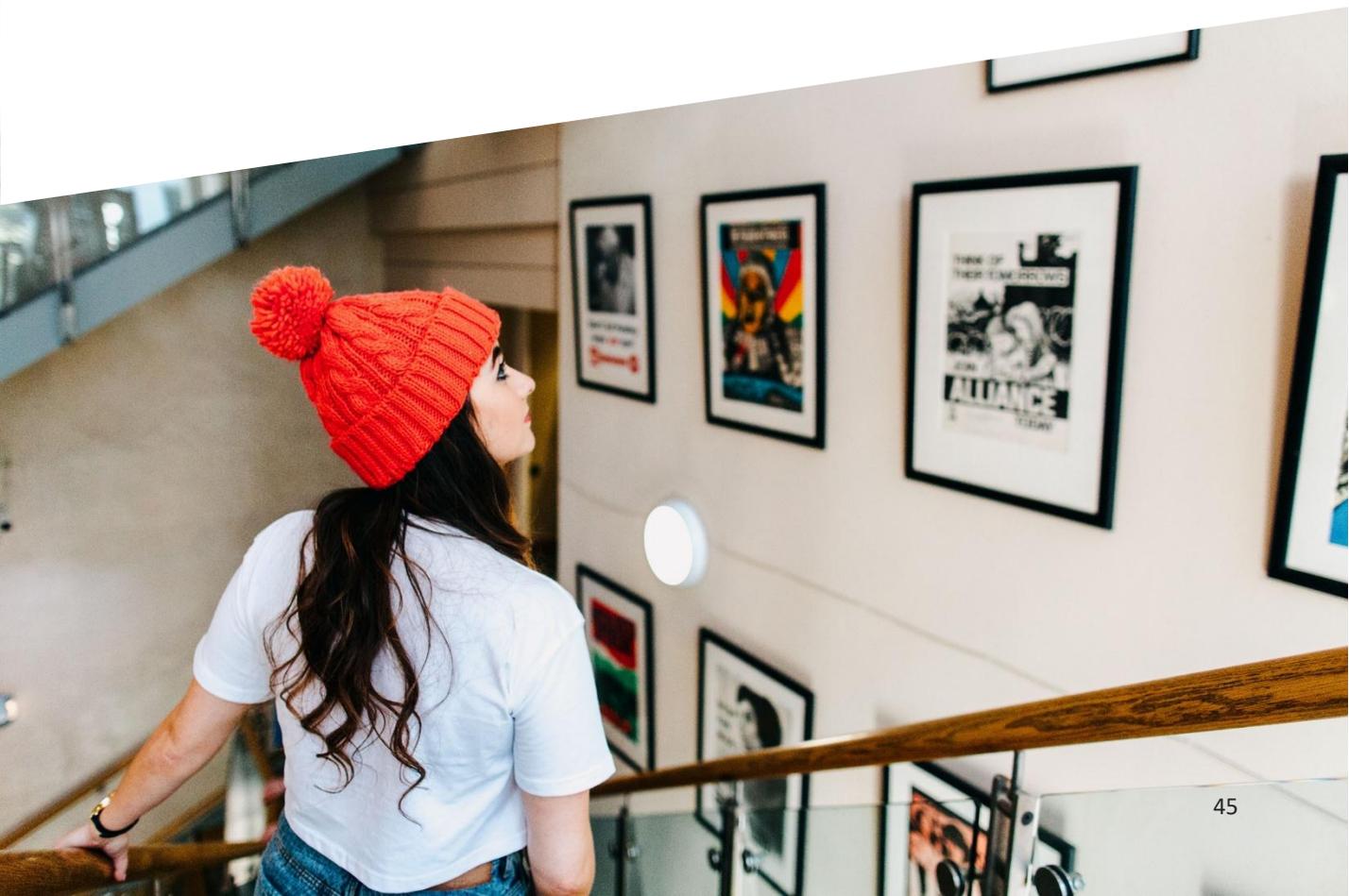


## What's changed from the previous year?

**Some motivations have shifted slightly.** There were slight increases in people attending arts and culture to feel inspired/uplifted (+4%), to learn something (+4%), or to experience something new (+3%).

**Audience demographics have shifted slightly.** This year we have 3% fewer disabled audiences (10% in FY24-25 vs. 13% in FY23-24). We have a slightly larger percentage of people coming from the extreme ends of the income brackets, with a 2% increase in people with earnings significantly lower compared to the NI median, and 2% more people with earnings significantly higher compared to the median. We have 3% more LGBTQ+ audiences in IMPACT compared to last year (8% vs. 5% in FY23-24).

**People are less likely to be doing other things as part of their visit.** Compared to the previous year, audiences in FY24-25 were less likely to be spending time in the local area (-4%), getting food/drinks at the venue (-3%) or staying overnight in paid-for accommodation (-2%).



## What's stayed the same?

**The top three motivations remain the same.** More than a third of audiences attend arts and culture to be entertained (71%), see a specific artist (45%) or to spend time with friends and family (44%).

**Arts and culture continue to be a social outing.** 90% of people attend with someone else. Most people tend to go with a spouse/partner (46%), friends/colleagues (27%), or extended family members (22%). Only a small portion attended with children - 9% came with children under 12 and 6% with children 12-18.

**Most behaviours remained the same.** The majority of IMPACT respondents (82%) were returning audiences to the venue/space they visited. Journey times are still fairly short, with over half (56%) travelling up to 30 minutes to a venue/space. Regardless of age, gender, or disability, over a third of audiences engage with arts and culture 6+ times a year.

**The impact of arts and culture are still felt by many.** Nearly three-quarters of audiences (74%) rated their experience as very good. The overwhelming majority of people (70%) feel happy after visiting an arts or culture space. People also reported feeling relaxed (35%), energised (25%), inspired (22%) and fulfilled (21%) after attending arts and culture. When asked what made their experience good, audiences commented on the lovely atmosphere, sense of community and enjoyment they got from their visit. Others mentioned being impressed by the level of talent, with one saying a performance was “well worth the 120-mile journey.” Disabled audiences and those who attended with children were extra appreciative of the overall experience and staff catering to their needs.

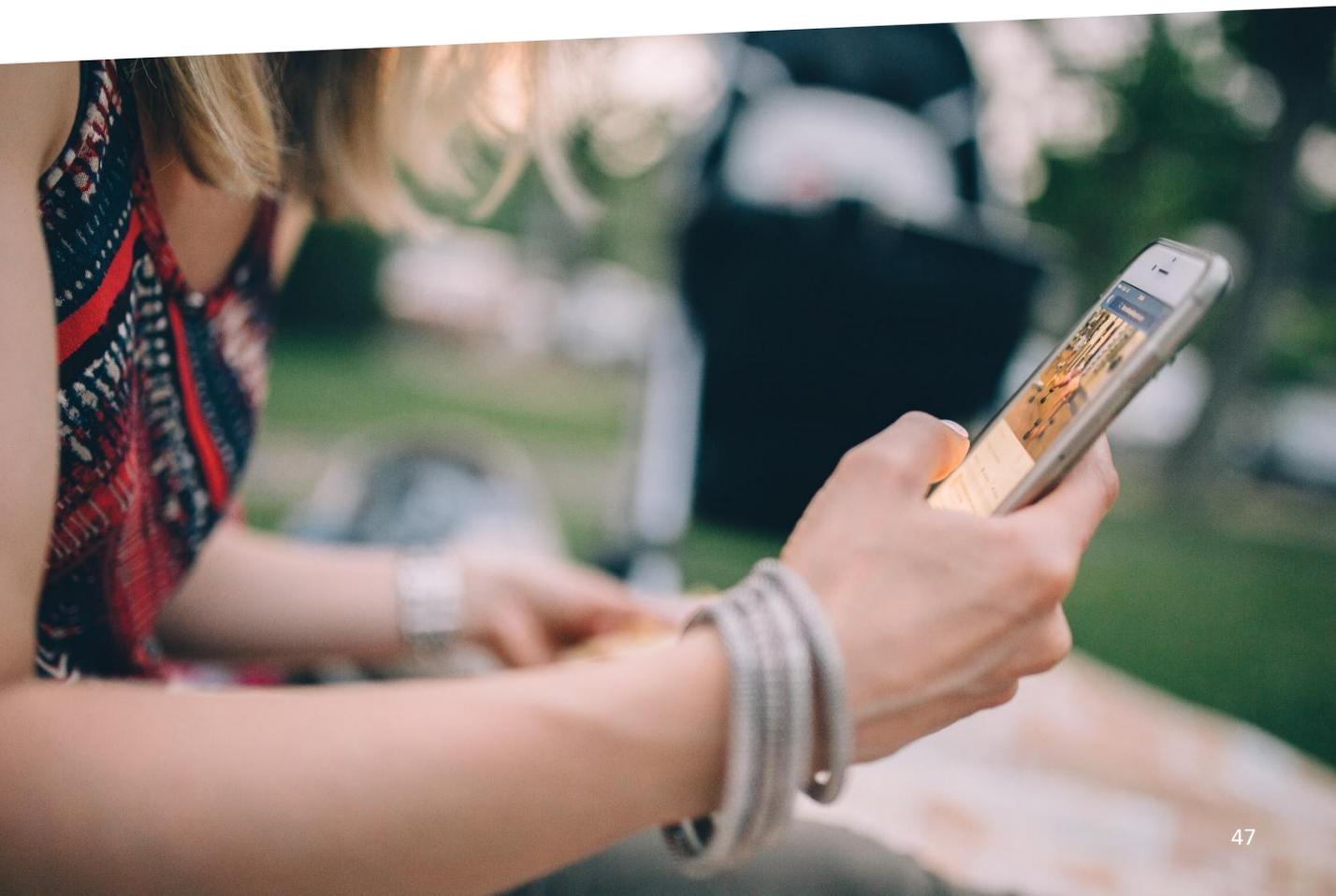
**The cost of living continues to affect the majority of respondents.** This includes 34% who are cutting back on ancillary spend, 26% going to things less often and 25% spending less on the experiences themselves. We can't however ignore the 34% of people who said that the cost of living doesn't affect their arts and culture experiences. These people are more likely to be older (age 55+), male, non-disabled, and on higher or significantly higher earnings.



## What's new?

**When asked about marketing channels, most audiences heard about the event or space through email, Facebook or word of mouth.** Print isn't dead though, as 10% mentioned seeing a printed brochure and 7% mentioned a poster/flyer. Age had the biggest impact on the marketing channels people selected. People aged 16-44 were more likely to mention Instagram, TikTok and word of mouth. Facebook was the most popular among 45-54 year olds, and email/newsletter and printed brochures were more popular among age 65+.

We asked audiences when they booked their tickets. **Only 12% of people were last-minute bookers, saying that they bought tickets the day/week of their visit.** Most (73%) said they booked between 2 weeks to 6 months in advance, with just 10% booking more than 6 months in advance. Reasons for booking last-minute were based on schedule uncertainty (49%) or lack of awareness of the event (28%). Some audiences are more likely to be last-minute bookers than others. This includes younger people aged 16-34 and those on lower incomes. This suggests there may be more factors at play affecting last-minute booking than simply lack of awareness or schedule uncertainty. Last-minute booking patterns also vary based on other factors - new audiences are also twice as likely to book last minute compared to returning audiences, and certain artforms have more last-minute bookers than others (including talks, theatre, visual art and dance).



## What's new?

We asked audiences to select which segment they belong to based on their attitude towards arts and culture. We saw that **arts and culture are an important part of their lives for most audiences**. 74% of audiences say they like to do as much arts and culture as they can, so they deliberately search for activities. While there are 22% who fit it in 'occasionally' and 4% who say they 'hardly ever' engage with arts and culture, a portion of both segments still engage quite frequently. 33% of the 'occasional' segment engages 4+ times a year, and 41% of the 'hardly ever' segment engages twice a year or more.

This year we asked specifically about additional spend in or around the venue, excluding tickets. Over **£91,000 was spent across 1,698 IMPACT respondents**. On average, IMPACT audiences spent £54 per party. This includes spend on food/drinks (in the venue or locally), money spent in the local area, and money spent on accommodation. **The amount spent varied by age, disability and income**. Younger audiences (aged 16-34), disabled audiences, and those on significantly lower incomes spent less on average compared to the total average. Spend also varied by artform, audience type, and motivations. Those attending dance, music, or comedy performances had higher spend compared to the total. New audiences spent £10 more on average compared to returning audiences. The highest average spend was among those celebrating a special occasion (£73 per respondent).



# 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.
- 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.

31 arts organisations across Northern Ireland have been taking part in the IMPACT survey in year 2 of the project. 2,805 survey responses have been collected from April 2024 to March 2025.

Participating organisations include:

Belfast Exposed, Black Box, Brassneck Theatre Company, Burnavon, Circusful, Down Arts Centre, The Duncairn, EastSide Arts, FE McWilliam, Golden Thread Gallery, High Points Ballet, Imagine! Belfast Festival, ISLAND Arts Centre, Lyric Theatre, Market Place Armagh, Millennium Forum, Naughton Gallery, NI Science Festival, Oh Yeah Music Centre, Open House Festival, Peter Corry Productions, Platform Arts, Portico of Ards, Queen Street Studios, SSE Arena, The MAC, Ulster Hall, University of Atypical, Vault, Waterfront and Young at Art.

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