

IMPACT

North West

Cultural engagement in the
North West of Ireland

2024-25



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The IMPACT North
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North West Audience Survey

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 the north and south of Ireland.

Because the people here aren't like anywhere else.

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

In the past year we heard from over 2,500 audience members, bringing our total data set to almost 7000 people since April 2022. 24 arts, culture and heritage organisations helped us collect the data from all across the region and from a variety of artforms.

The research has also changed and evolved centred on these learnings. Based on 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, capturing more detail around the impact arts, culture and heritage has on people's 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](#).

The data reveals that audiences in the North West are highly engaged, with distinct behaviours, motivations, and spending patterns compared to Northern Ireland—particularly in last-minute booking and ancillary spending.

The research also proves that cultural engagement has both an economic and social impact, with audiences spending an average of £79 beyond ticket costs and people reporting strong emotional benefits from attendance. Despite cost-of-living pressures, many continue to prioritise arts and culture, with some even reducing other expenses to maintain participation.

That is quite a story of cultural engagement in the North West.

INTRODUCTION

The North West Audience Development Project is unique on the island of Ireland as the only cross-border audience development programme. This partnership between Donegal County Council (DCC) and Derry City & Strabane District Council (DCSDC) provides a much clearer picture of who is engaging with culture across the region and where opportunities exist to grow audiences.

The North West is home to unique audiences, shaped by a mix of rural and urban settings and the contrasts that exist on either side of the border. This diversity is matched by the range of cultural product on offer in the region from music and festivals to theatre, heritage and contemporary arts. The project aims to open these opportunities to new audiences and build a fuller understanding of participation across the area.

This work has only been possible because of the participation of local cultural organisations. Their willingness to share audience information has created a strong baseline of data, and we encourage others to do the same. The benefit for organisations is clear; a better understanding of their own audiences, and the chance to share knowledge on a peer-to-peer basis with others across the North West.

The intelligence gathered is already being used to inform the respective councils strategic approaches, ensuring that decisions are grounded in evidence rather than assumption. This data will continue to shape strategy and support cultural organisations to respond effectively to the needs of audiences.

*John Kerr
Arts and Culture Manager,
Derry City and Strabane District Council*



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

INTRODUCTION

The North West Audience Development Project is a key tool to enhance access, participation, engagement with and enjoyment of culture and creativity across the region. Donegal County Council (DCC) and Derry City & Strabane District Council (DCSDC) both recognise the fluidity of movement between both local authority areas and are committed to working collaboratively to ensure we develop and adopt strategic approaches which are evidence-based.

We believe that promoting and supporting culture and creativity is good for our society, our economy and our identity. Investing in culture and creativity is a commitment to a healthier, fulfilled, prosperous and successful region. For this to be achieved, we need to ensure that residents and visitors are aware of and excited by our programmes and events, feel welcome and connected when they attend, and are inspired by what they experience.

Growing audiences and enhancing services in the region will be made possible through understanding existing audience behaviours locally across all event types. We would like to thank all the cultural organisations who participated in the surveys and contributed in other ways to help us understand our existing audiences better. We now have a clearer picture of where we are at, and have information to help chart a course for a sustainable future.

We look forward to continuing to collaborate with partners in the North West region in order to enhance our cultural offering, investing in our communities' wellbeing, contributing to economic growth and our shared identities on a Shared Island.

*Maureen Kerr
County Librarian / Culture Division Manager,
Donegal County Council*



**Comhairle Contae
Dhún na nGall**
Donegal County Council

INTRODUCTION

This project is a timely and important contribution to our understanding of how people engage with the arts across our region. It demonstrates, once again, that audiences are not homogenous. They are shaped by place, by community, and by circumstance.

The results show that audiences in the North West approach arts engagement differently from those elsewhere in Northern Ireland. These findings matter because they remind us that audience development is not simply about monitoring behaviour. It is a tool for action.

One of the most encouraging results is that 43% of disabled audiences who were surveyed in the North West reported taking part in arts experiences more than six times a year, compared with a regional average of 39%. This is a positive sign, and suggests that when barriers are lowered, demand is strong. It also underlines how much more we can do. Accessibility cannot be treated as an optional extra. That is why the Arts Council of Northern Ireland is proud to be supporting the development of All In, a new UK and Ireland access scheme for creativity and culture to remove barriers and welcome deaf, disabled and neurodivergent people. The scheme aims to launch its pilot in Northern Ireland in 2026.

Equally significant is the collaborative nature of this research itself. By working across councils, across communities, and across the border, the North West has produced evidence that is richer and more meaningful than any single organisation could achieve. It shows what can be done when we work together and keep audiences at the centre of our thinking.

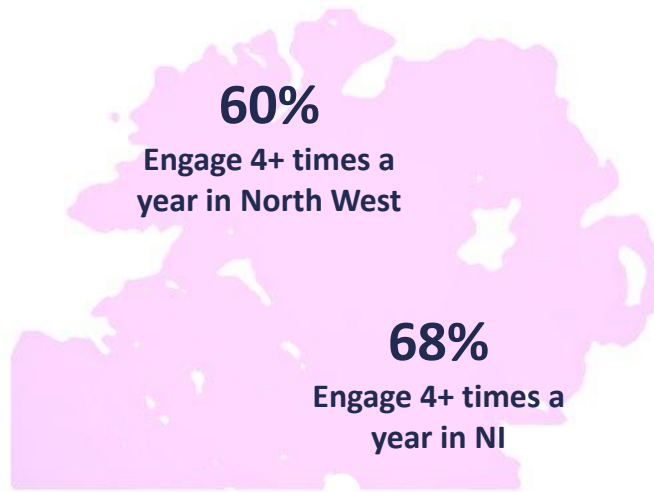
The Arts Council of Northern Ireland welcomes this project. It provides not just data, but also insights for action. It gives organisations the tools to understand their audiences more deeply, and the confidence to adapt in ways that are both creative and sustainable. Most importantly, it shows that the arts in the North West are distinctive and rooted in the lives of the people who engage with them.

*Dr. Javier Stanziola
Director of Strategic Development and Partnerships
Arts Council of Northern Ireland*

Audiences in the North West behave differently

23% are new to the space (vs 18% in NI)

34% took less than 15 mins to travel to venue (vs 19% in NI)

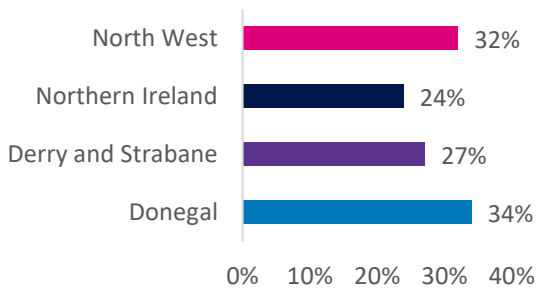


27% book day/week of event (vs 12% in NI)

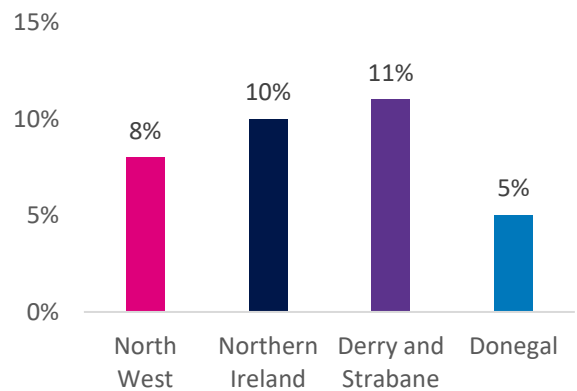
Average spend of £79 per person (vs £54 in NI)

This is not to say that there aren't some differences regionally

% who have children under 16 living with them



% who are disabled or D/deaf



Derry and Strabane audiences are more likely to



Be retired



Feel relaxed, safe/comfortable after attending



Earn less than the median earnings in NI



Attend with other family members/friends or colleagues

Donegal audiences are more likely to



Be in full-time employment



Feel energised or inspired after attending



Have children under 18 in the home



Attend with their spouse or with children

SECTION 1

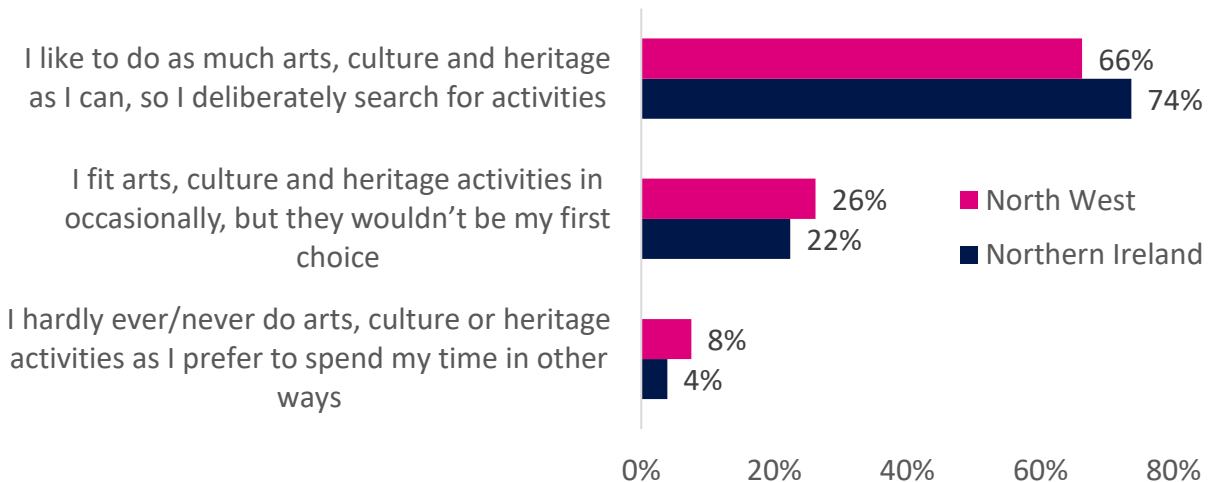
AUDIENCE BEHAVIOUR



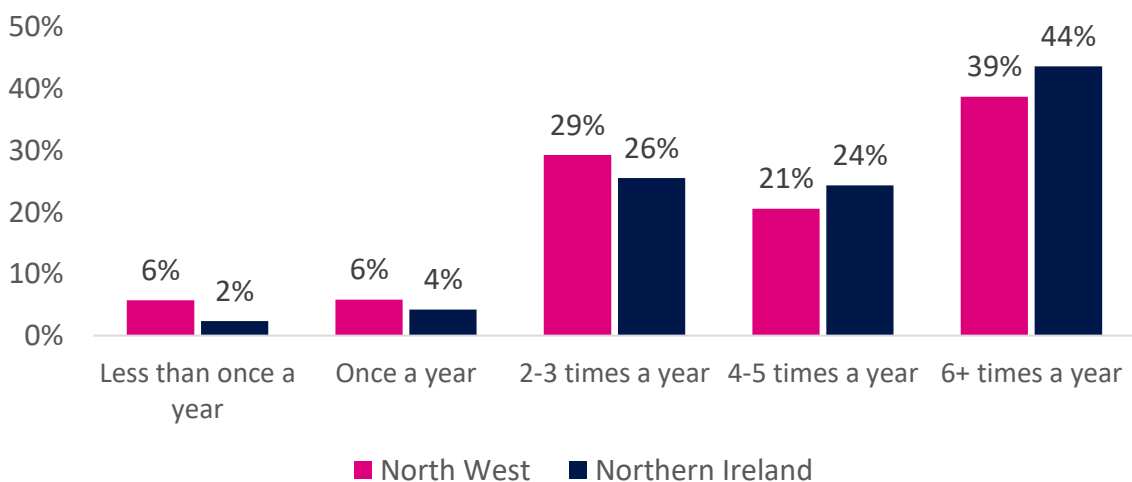
Two-thirds of people in the North West are **very engaged with the sector**, saying that because they like to do as much arts, culture and heritage as they can, they deliberately search for activities. A further quarter (26%) fit arts, culture and heritage into their lives occasionally, but don't see it as their first choice.

60% of the North West total engage in arts, culture or heritage at least four times a year. This is slightly lower than what we see in IMPACT in Northern Ireland (68%).

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



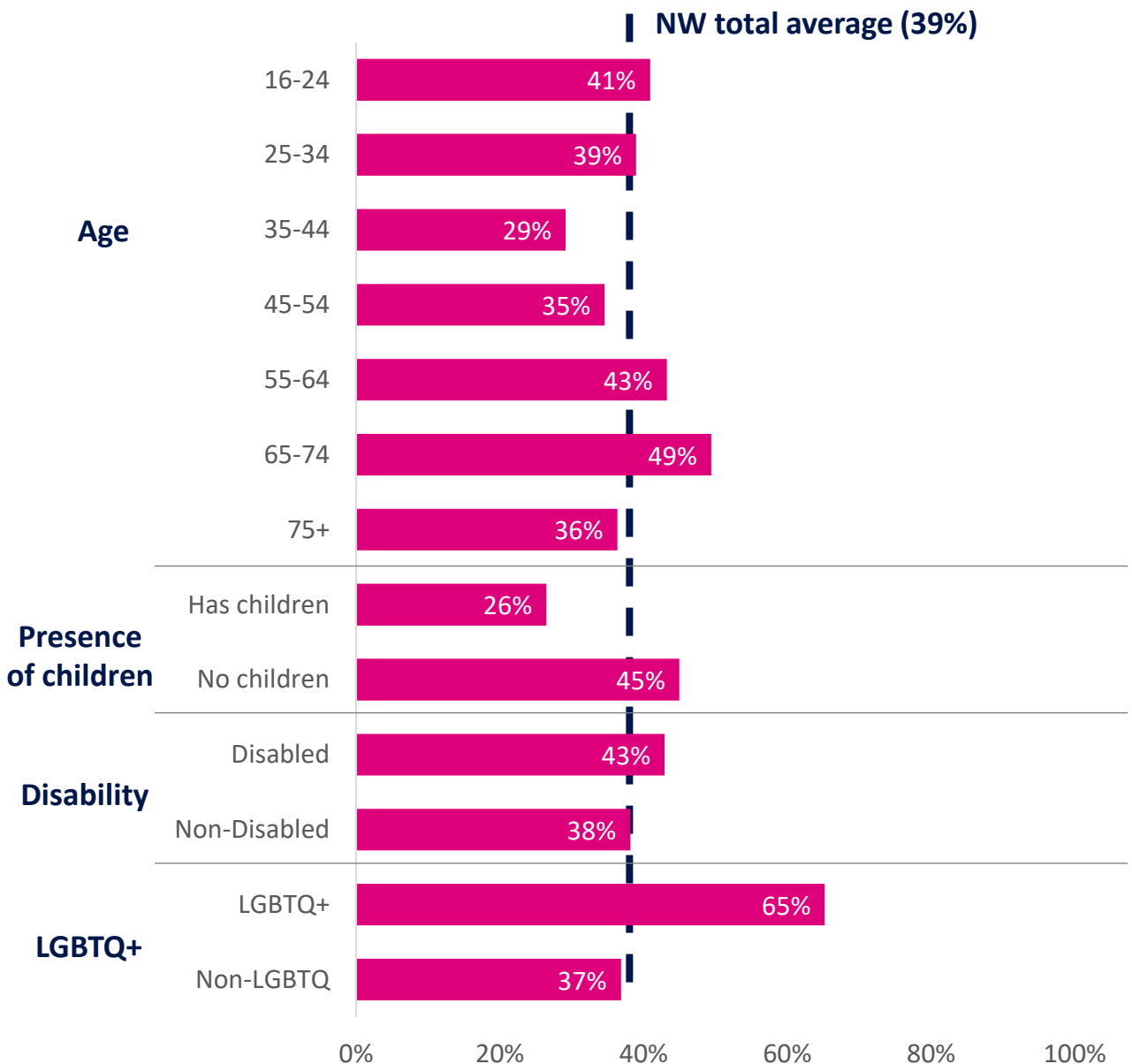
How often do you attend or participate in arts, culture or heritage experiences?



Engagement levels are influenced by certain factors in the North West. Engagement fluctuates by age, with people 55-74 years old engaging more frequently than those aged 35-54. People without children in the household engaged more frequently than those with children, which may partially explain the age groups noted above.

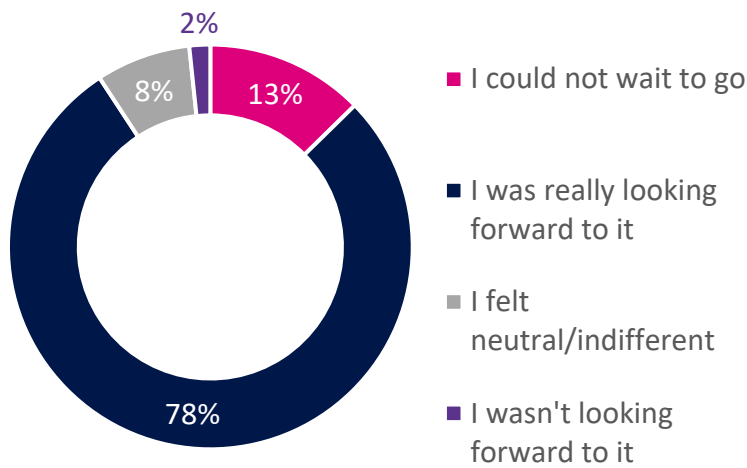
LGBTQ+ audiences engage very frequently - **65%** engage with arts, culture and heritage 6+ times a year compared to non-LGBTQ audiences at **37%**.

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



AUDIENCE BEHAVIOUR

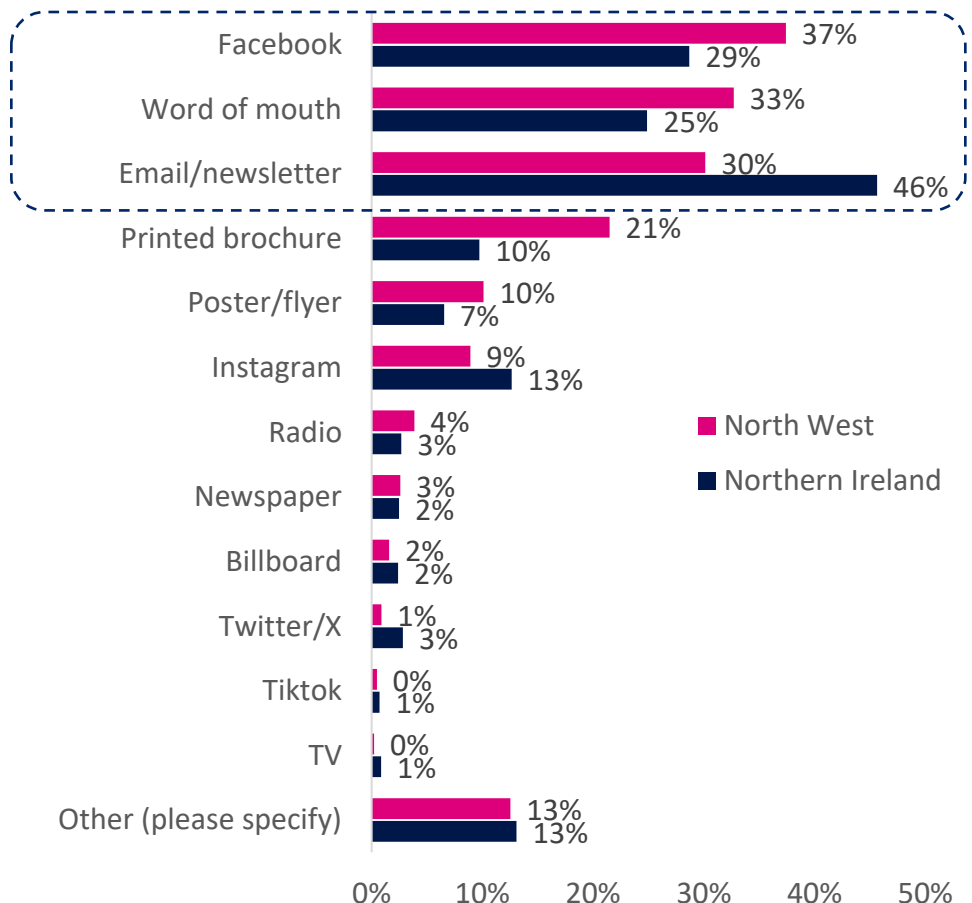
How did you feel about going?



Most audiences (**78%**) were looking forward to their visit, with an additional **13%** saying they could not wait to go.

Audiences were most likely to say they heard about the place they visited via Facebook, word of mouth, or email/newsletter. Compared to Northern Ireland, Facebook, word of mouth, and print methods (such as brochures and posters/flyers) were selected more by North West audiences than in NI.

Which of the following ways did you hear about the place you visited?
Please select all that apply.



AUDIENCE BEHAVIOUR

Certain marketing channels are more popular among different age groups. Generally, Facebook has wide appeal among most age groups, but is most popular among the middle ages of 35-54.

Younger audiences aged 16-44 were more likely to say word of mouth, posters/flyers and Instagram. As expected, Instagram and Tiktok are most popular among the youngest group aged 16-24. Radio and billboards are also popular among this group, though for reasons that are unclear.

Audiences aged 55+ were more likely to mention email/newsletter or printed brochure.

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

	TOTAL NW	16-24	25-34	35-44	45-54	55-64	65-74	75+
Facebook	37%	30%	34%	43%	45%	37%	29%	15%
Word of mouth	33%	41%	50%	34%	30%	33%	28%	29%
Email/newsletter	30%	14%	17%	25%	30%	35%	35%	38%
Printed brochure	21%	9%	18%	21%	18%	25%	25%	23%
Poster/flyer	10%	20%	19%	12%	10%	9%	7%	9%
Instagram	9%	30%	23%	14%	9%	5%	2%	0%
Radio	4%	9%	1%	4%	5%	4%	3%	2%
Newspaper	3%	5%	2%	3%	2%	2%	3%	6%
Billboard	2%	5%	1%	2%	2%	1%	2%	0%
Twitter/X	1%	0%	1%	2%	0%	1%	1%	0%
Tiktok	0%	7%	0%	1%	0%	0%	1%	0%
TV	0%	0%	1%	0%	0%	0%	1%	0%
Other (please specify)	13%	9%	10%	10%	13%	13%	15%	11%

Key:



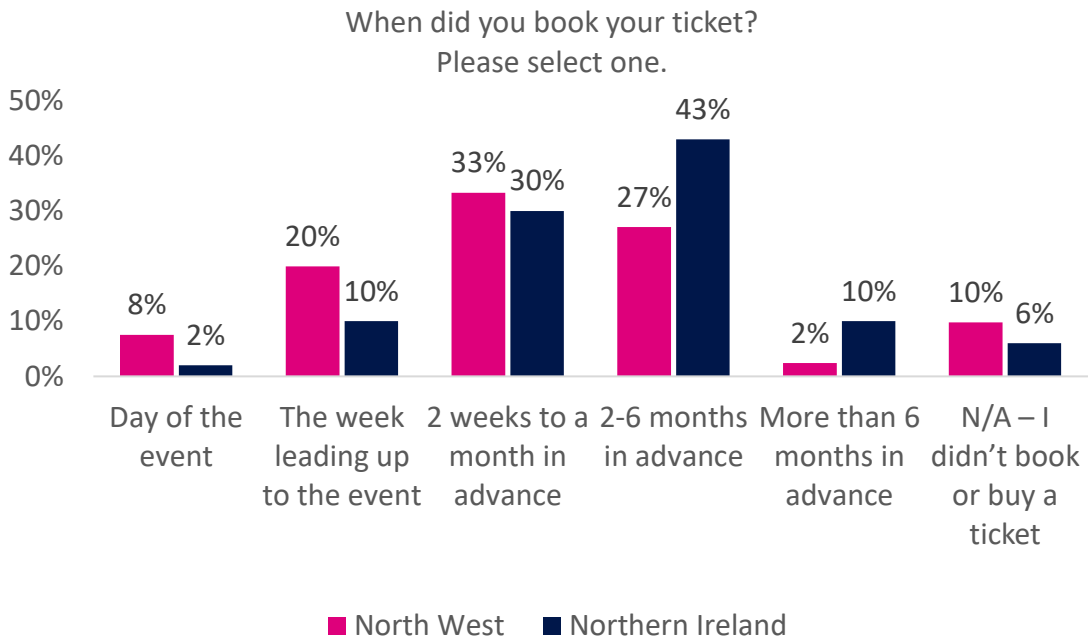
Lowest in the row

Highest

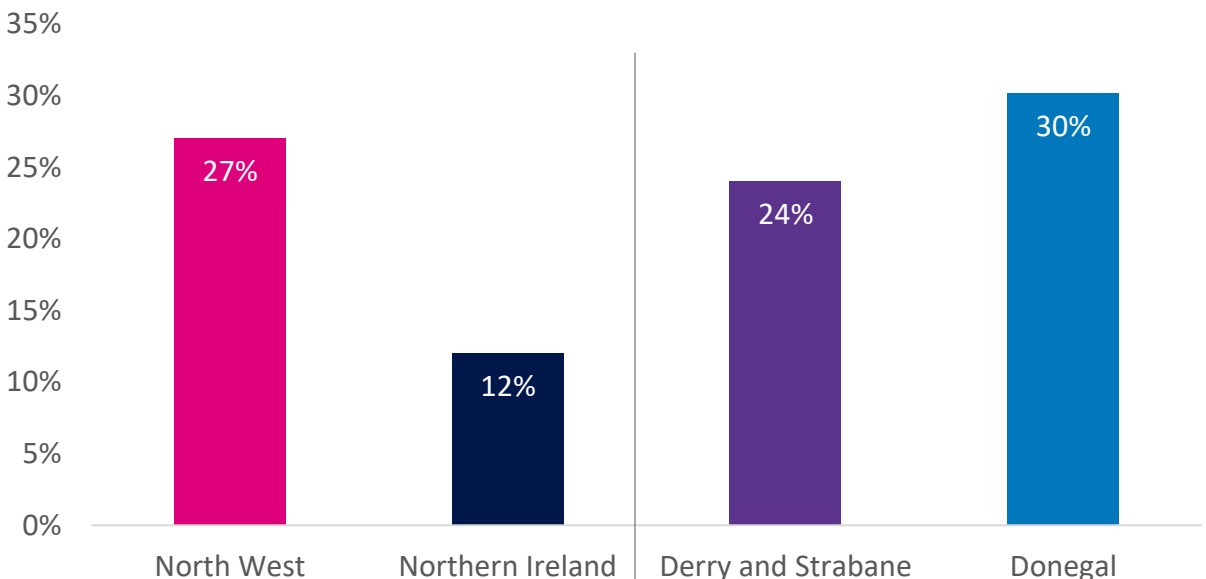
AUDIENCE BEHAVIOUR

Over a quarter (27%) of North West audiences booked their ticket on the day or week of their visit. To compare, in the rest of NI, this figure sits at 12% .

Audiences engaging with arts and culture in Donegal were more likely to book last-minute (30%) compared to people in Derry and Strabane (24%).



Percent of audiences booking the day/week of their visit



AUDIENCE BEHAVIOUR

We cut the data to see what factors had an impact on last-minute booking.

Age appears to impact booking patters with younger age groups (16-44) being more likely to book late as well as those aged 75+

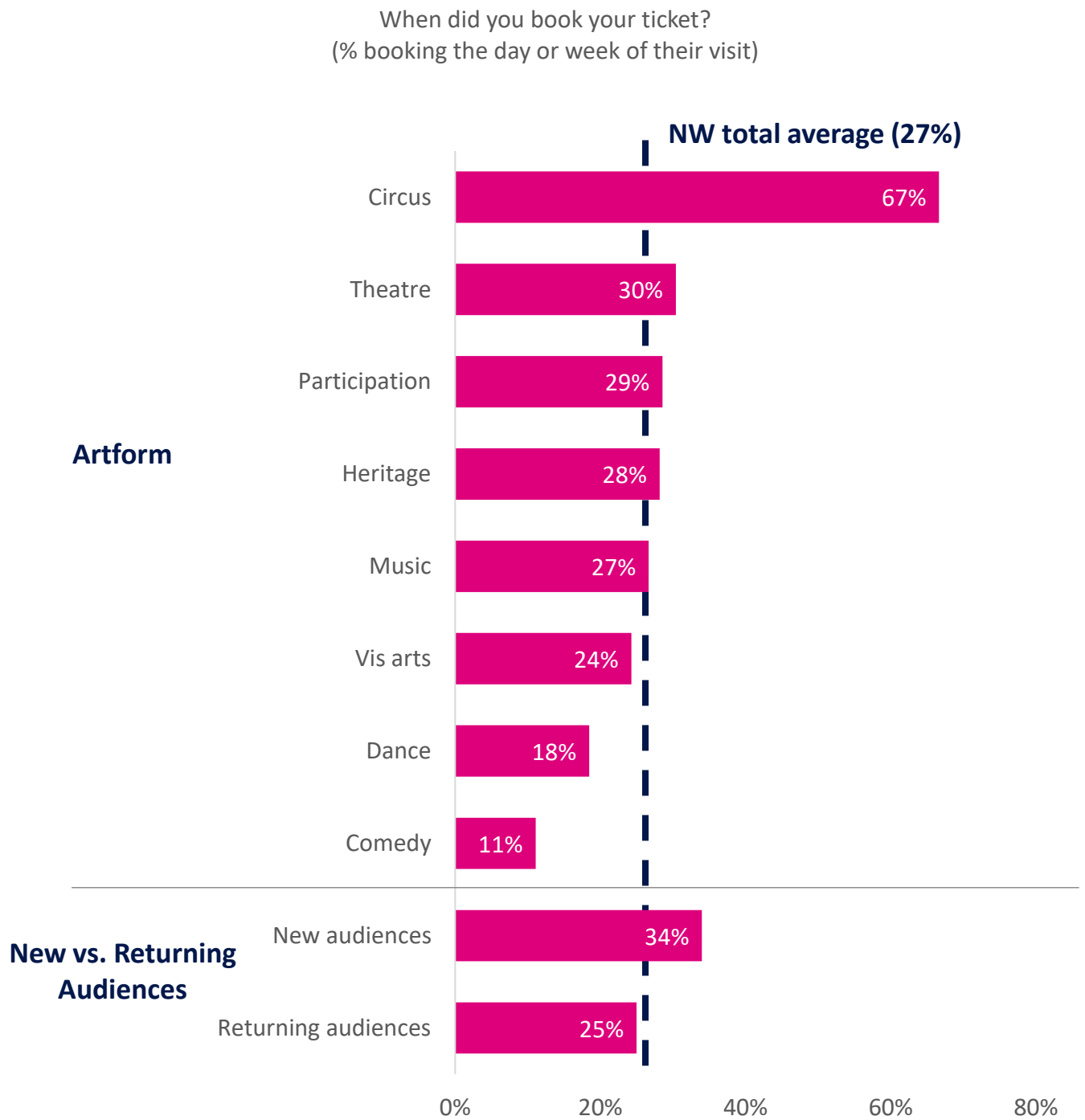
Booking data cut by earnings was inconclusive.

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

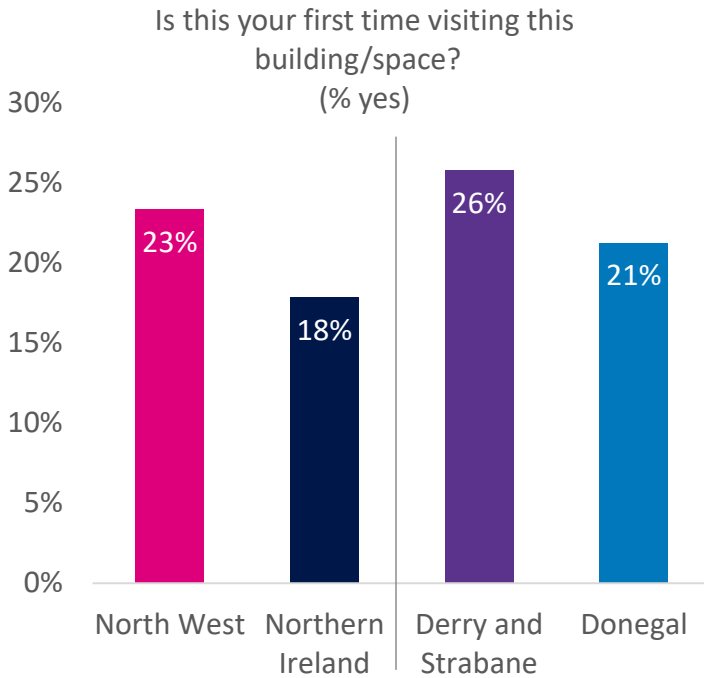


Artform only had a slight impact on last-minute booking, with the exception of circus – two thirds (67%) of circus attenders bought their ticket the day or week of their visit.

New audiences were more likely to book last-minute compared to those returning to a venue.



AUDIENCE BEHAVIOUR

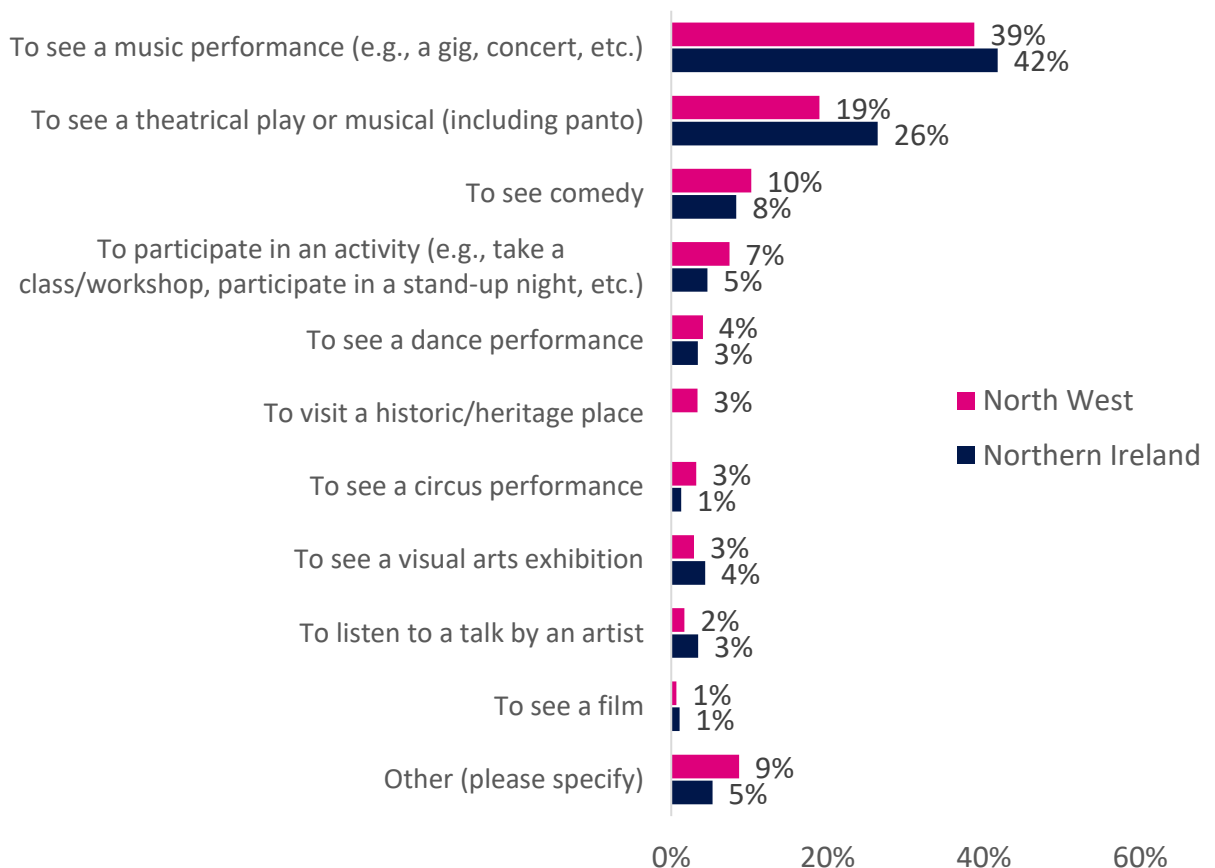


New audiences made up just under a quarter (23%) of all North West responses. This was higher compared to audiences in Northern Ireland.

Derry and Strabane had a higher percent of new audiences compared to Donegal.

In the North West, the most widely attended artforms included music, theatre, and comedy.

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

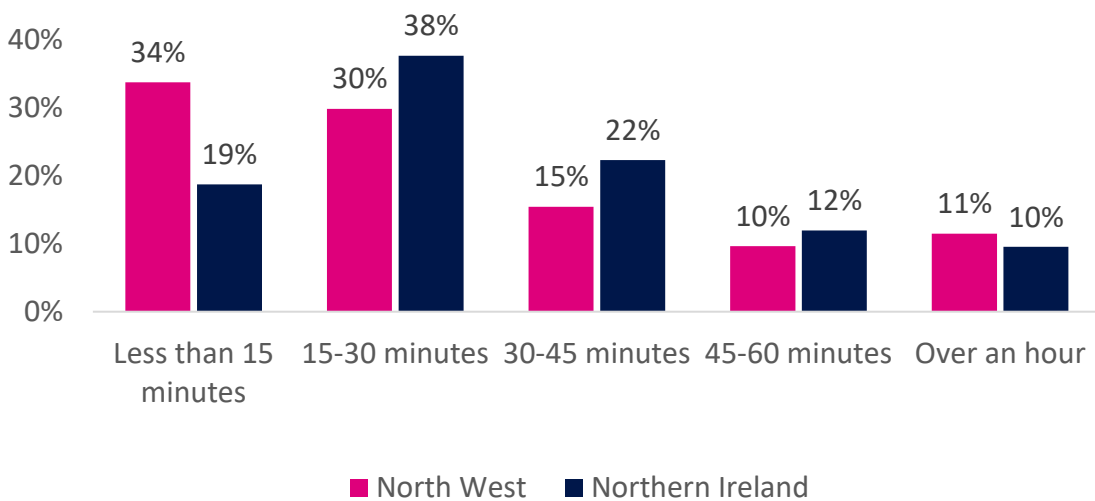


AUDIENCE BEHAVIOUR

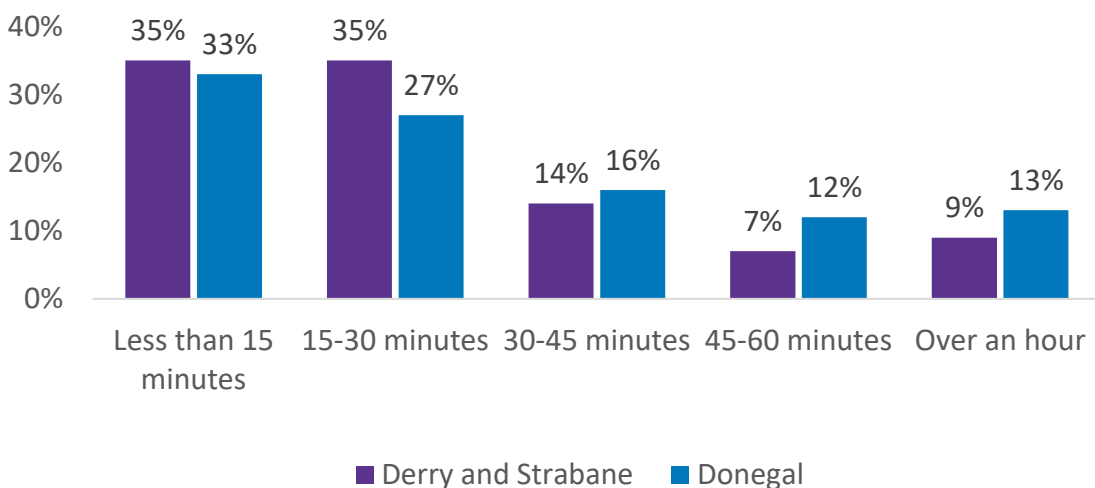
Journey times were shorter in the North West compared to Northern Ireland – **34%** of North West audiences came from within 15 minutes of the place they visited, compared to **19%** of audiences in Northern Ireland.

Surprisingly, there wasn't as stark a contrast between Donegal and Derry and Strabane when you look at the shorter journey times. 35% of people attending things in Derry and Strabane had a 15 minute journey or less, compared to 33% of those visiting spaces in Donegal. We do see more of a difference, however, as you look at longer journey times. A quarter (25%) of people engaging in arts, culture and heritage in Donegal spent more than 45 minutes travelling to their destination, compared to 16% of those in Derry and Strabane.

Approximately how long did your journey take?

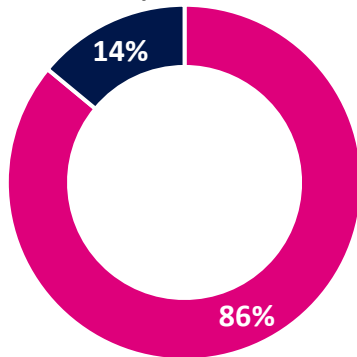


Approximately how long did your journey take?



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

(10% Northern Ireland)



(90% Northern Ireland)

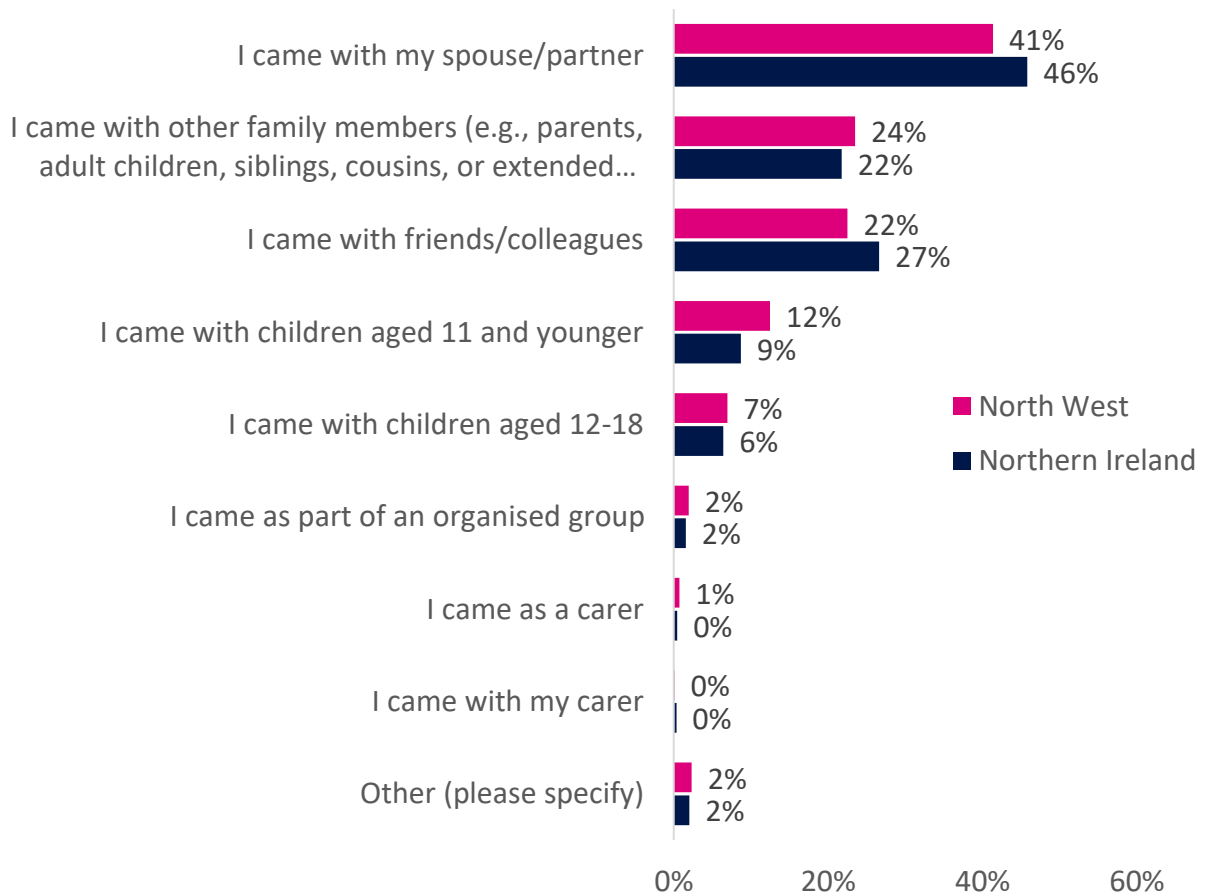
■ Attended with someone else ■ Came alone

Most audiences in the North West (86%) came with others, just 14% attended alone. People were more likely to go alone in the North West compared to Northern Ireland (10%).

People in the North West were most likely to attend with their spouse/partner, other family members, or friends/colleagues.

There were a few slight differences compared to IMPACT – in the North West, people were more likely to attend with other family members or children of all ages.

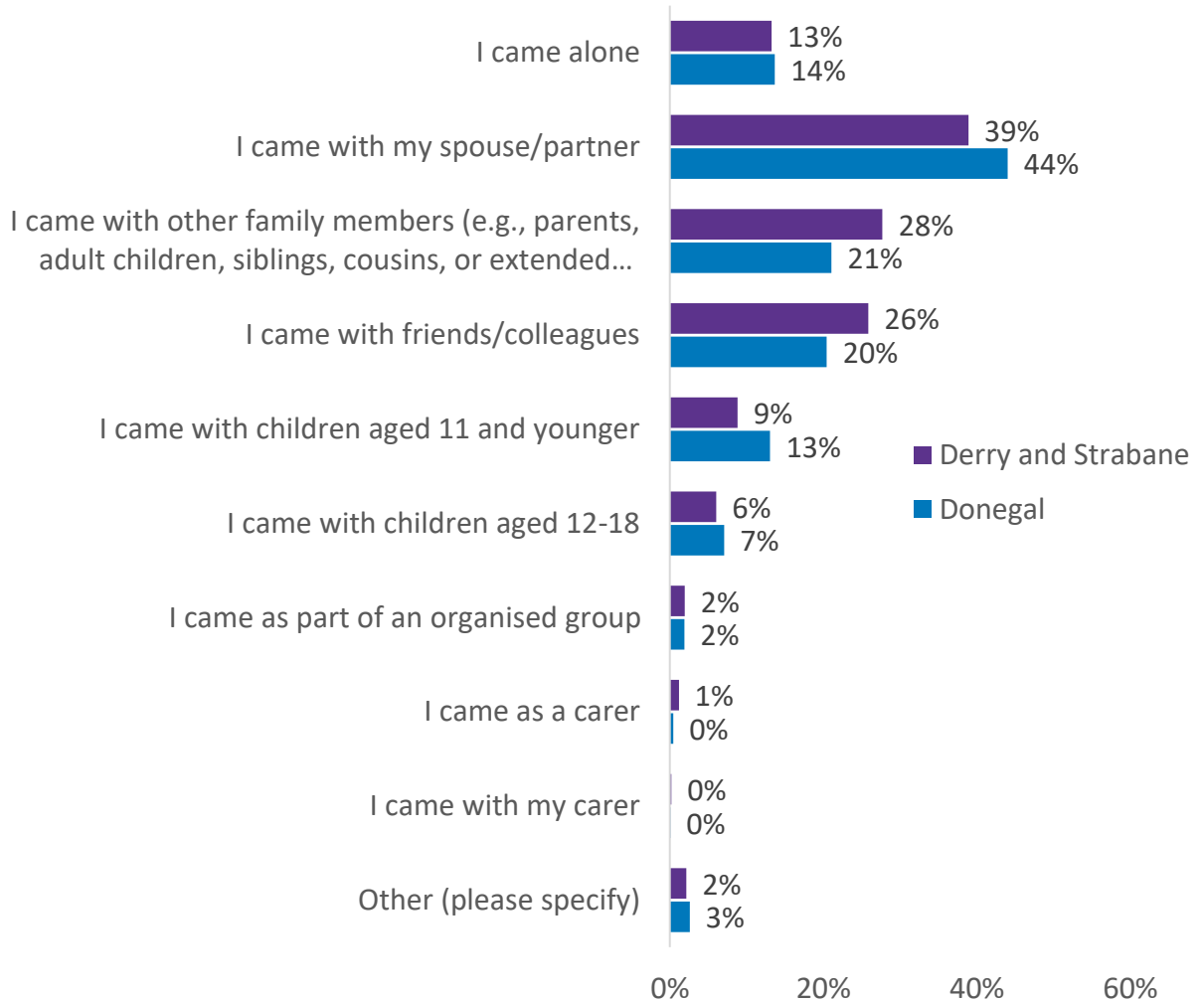
Who did you come with during your visit? Please select all that apply.



AUDIENCE BEHAVIOUR

When looking at the data cut by geography, we see Donegal audiences are **more** likely to attend with extended family members and friends/colleagues. People in Derry and Strabane were **more** likely to attend with a spouse/partner or children.

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



SECTION 2

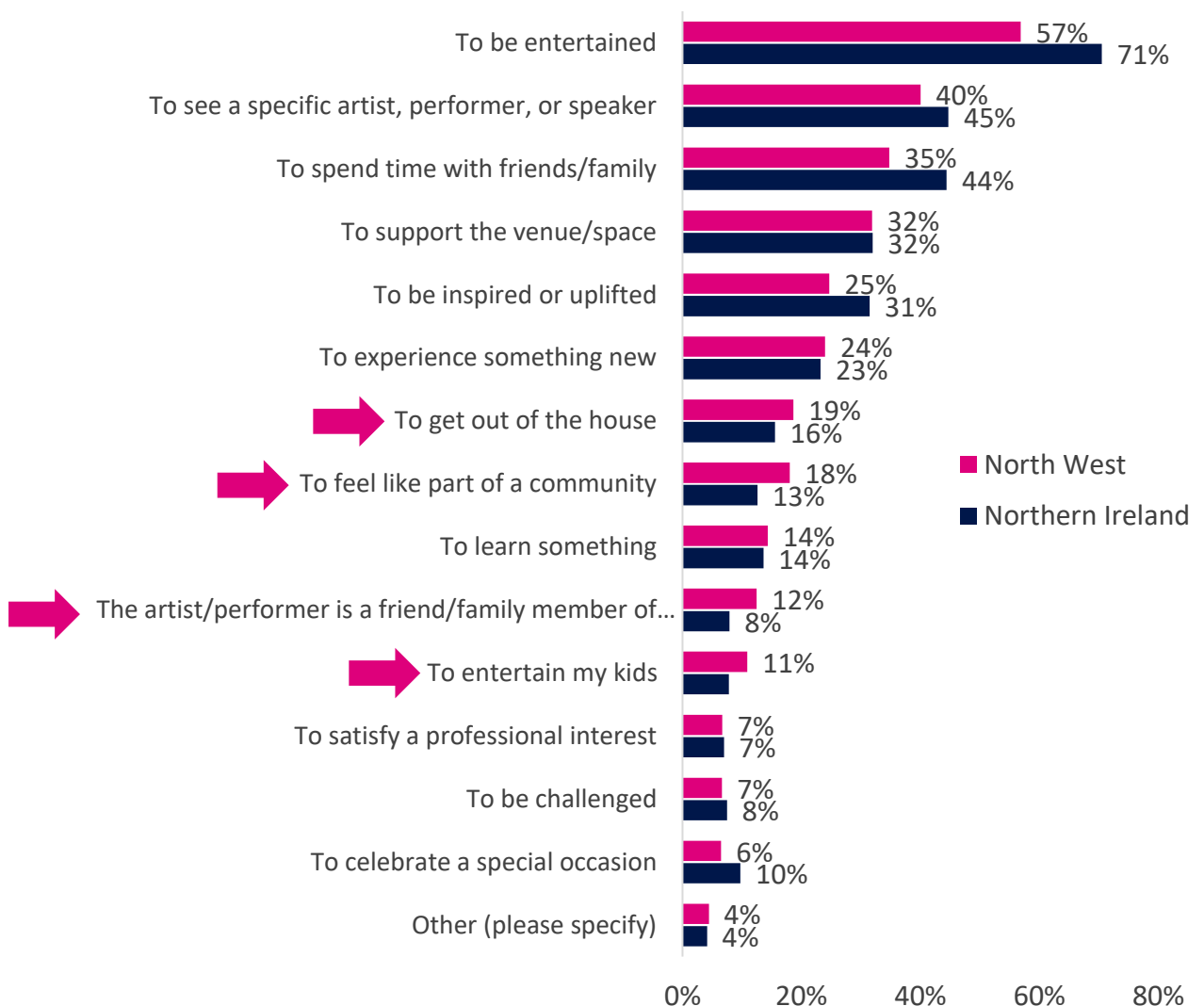
AUDIENCE MOTIVATIONS



Audiences in the North West are motivated to engage in arts, culture and heritage for a variety of reasons. Over a third of people go because they want to be entertained, see a specific artist/performer, or spend time with friends and family. These are the same top reasons for attending in Northern Ireland.

Compared to Northern Ireland, North West audiences were more likely to want to get out of the house, to feel like part of a community, go because they personally know the artist/performer, or go to entertain their children.

Are any of the following reasons why you made your visit/decided to take part?
Please select all that apply.

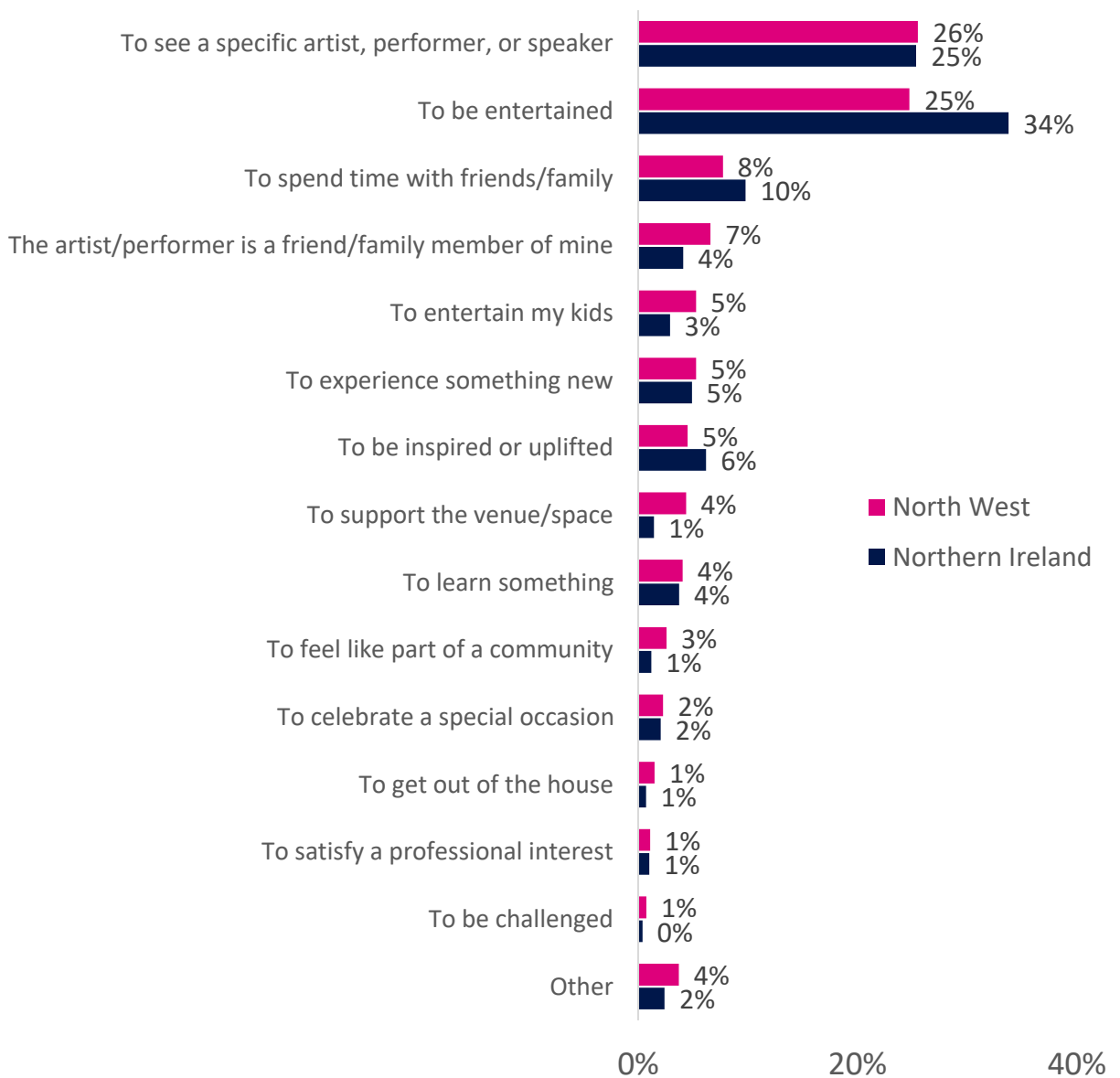


AUDIENCE MOTIVATIONS

When asked their main reason for visiting, the top answer was to see a specific artist, performer or speaker (26%), followed by wanting to be entertained (25%). By comparison, all other response options were much smaller.

The overall trend was similar to that of Northern Ireland, though a much larger portion of people in Northern Ireland selected 'to be entertained' as their main motivation.

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



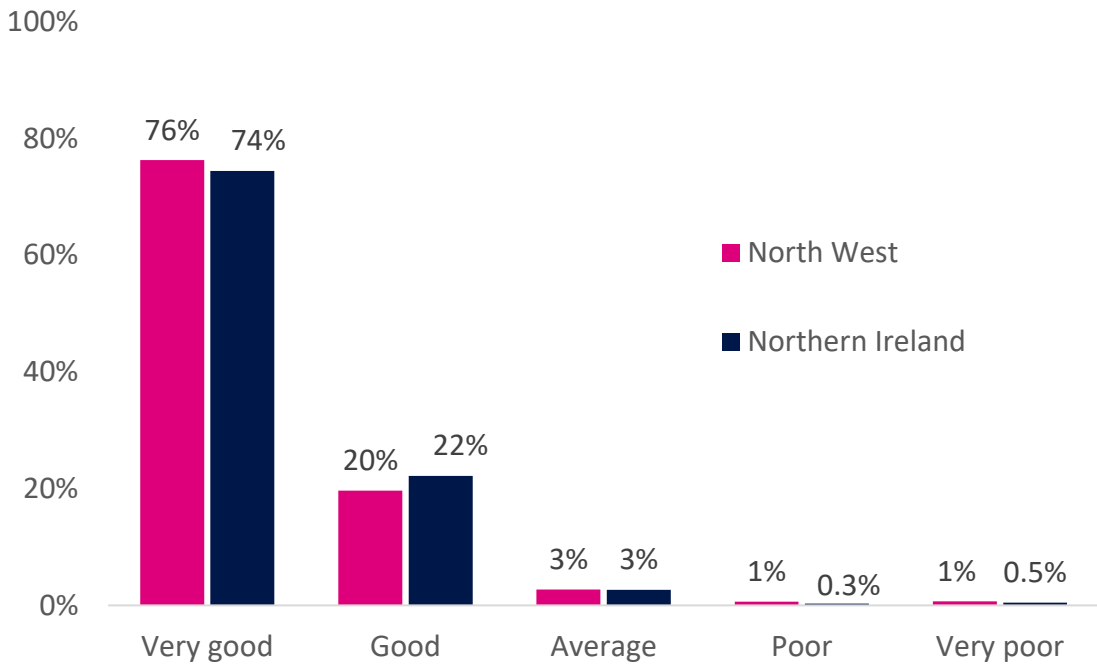
SECTION 3

AUDIENCE IMPACT



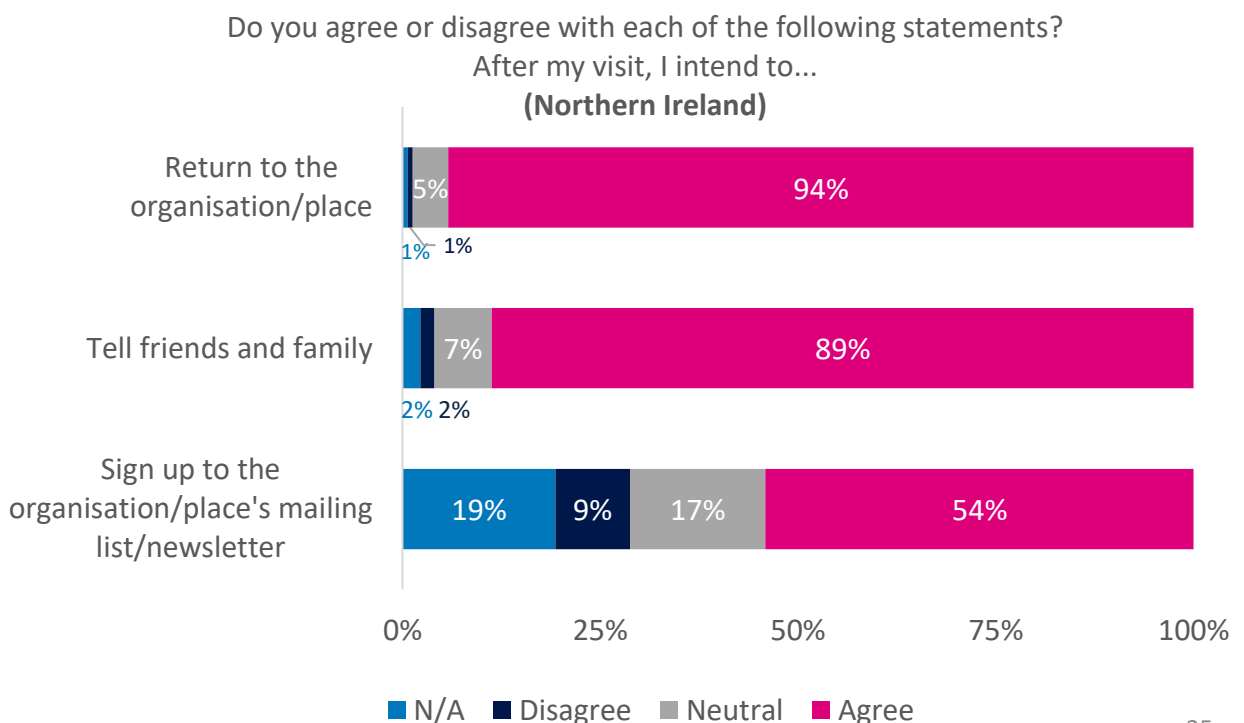
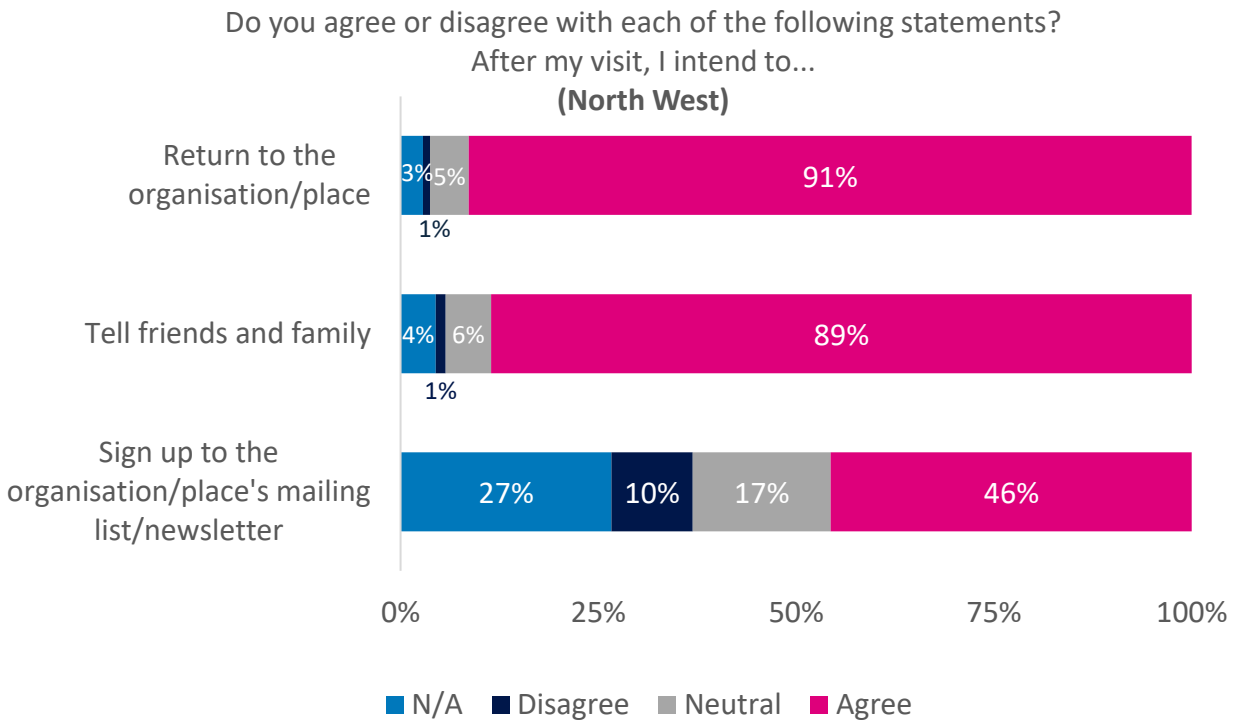
People’s overall experience in the North West was very positive, 76% rated their experience as very good. This was slightly higher than Northern Ireland.

What was your overall experience like?



Most audiences in the North West agree that they would return to the organisation/place and tell friends/family about their experience.

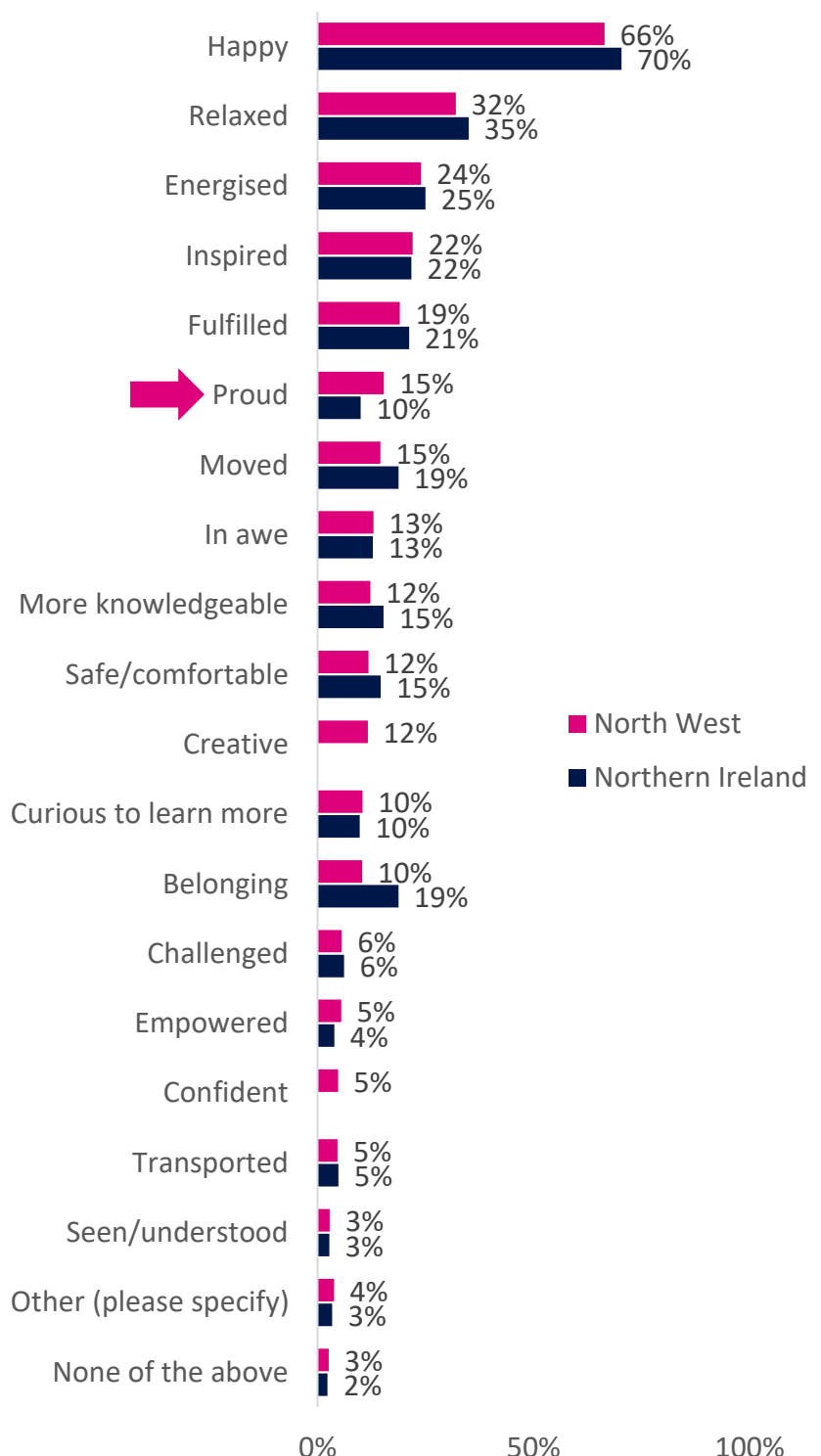
Results were roughly similar compared to Northern Ireland.



Two-thirds of audiences in the North West reported feeling happy after their visit. Other responses included feeling relaxed, energised, inspired and fulfilled.

Audiences in the North West were more likely to say they felt proud after their visit.

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



Most audiences were pleased with positive experiences, great performances and lovely atmosphere, and helpful staff. In total, over 2,000 people write a positive response. People really appreciated feeling connected to culture, and those attending with children were thankful for family-friendly events and activities. Audiences also mentioned a sense of community from attending, with the organisations making them feel safe and inclusive.

In comparison, only 25 attender had comments about negative experiences or offered suggestions for improvement. This included comments around uncomfortable seats, difficult access and lack of refunds putting them off the experience.

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

Theme	Example Quotes
Positive Experience & Enjoyment	<ul style="list-style-type: none"> “The event reached across age groups and gender and religion....it was amazing.”
Quality of Performances	<ul style="list-style-type: none"> “The quality of the acts was outstanding”
Venue Atmosphere	<ul style="list-style-type: none"> “Lovely intimate Theatre. Really enjoyed the concert.”
Friendly and Helpful Staff	<ul style="list-style-type: none"> “A fantastic facility with friendly staff and a wonderful class.”
Appreciation of Place and Culture	<ul style="list-style-type: none"> “It was something I hadn't experienced here before that connected me to my home culture.”
Family-Friendly	<ul style="list-style-type: none"> “I had 3 children with me age 7,6 & 5 each of us thoroughly enjoyed the show absolutely amazing production. We were all entertained and it was on our door stop so delighted to see such an amazing show in our local theatre”
Sense of Community	<ul style="list-style-type: none"> “Great local art and entertainment and a lovely sense of community and cultural engagement on the day.”

You mentioned that your experience was poor or very poor.
What can we do to improve your experience?

Theme	Example Quotes
Seating Quality	<ul style="list-style-type: none"> “It was excellent apart from the seats. This would make me think twice about returning.”
Accessibility and Layout	<ul style="list-style-type: none"> “I needed to be sitting closer to the stage to hear all the dialogue in the play.”
Refunds	<ul style="list-style-type: none"> “I was a disappointed I couldn't get a refund on 3 tickets out of the 6 tickets I had bought in advance as 3 members of our family could not attend due to health reasons... and it annoyed me during the show as I looked at 3 empty seats I had paid for.”

SECTION 4

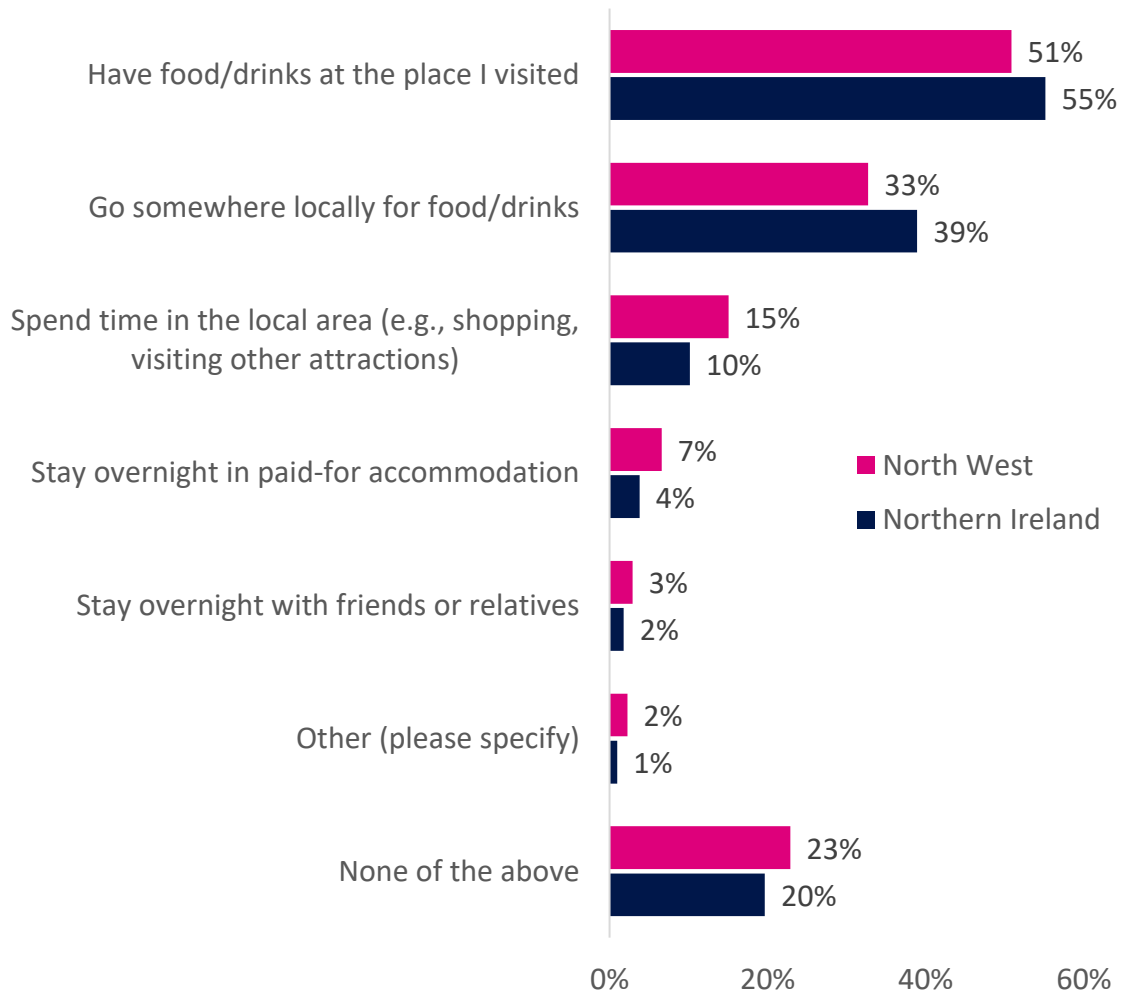
ECONOMIC IMPACT



The majority of North West audiences did something extra as part of their visit – 51% got food/drinks at the venue itself, 33% went somewhere locally for food/drinks, and 15% spent time in the local area.

Audiences in Northern Ireland were more likely to get food/drinks either at the venue or locally, while North West audiences were more likely to spend time in the local area.

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

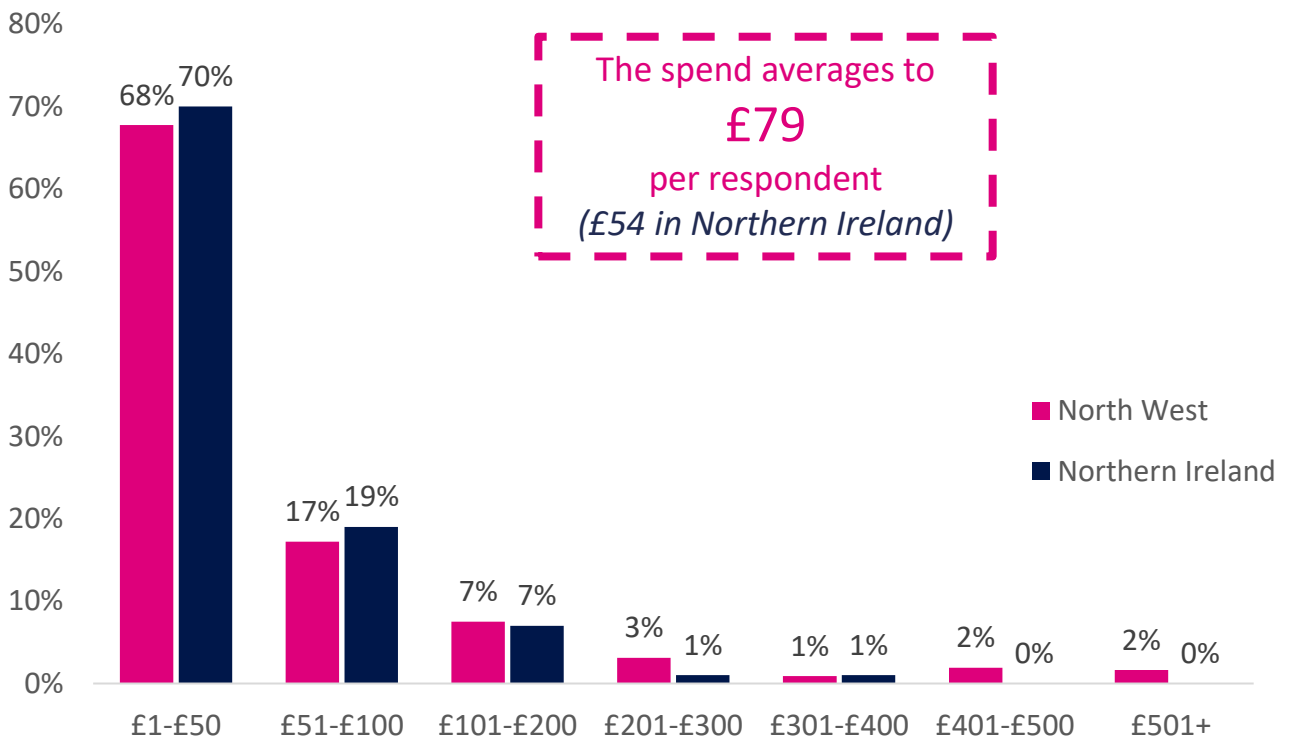


Average spend per respondent was higher in the North West. Among those who spent money on things besides tickets, North West audiences spent an average of £79 per respondent compared to £54 in Northern Ireland.



£115,998
Was spent across 1,470 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?

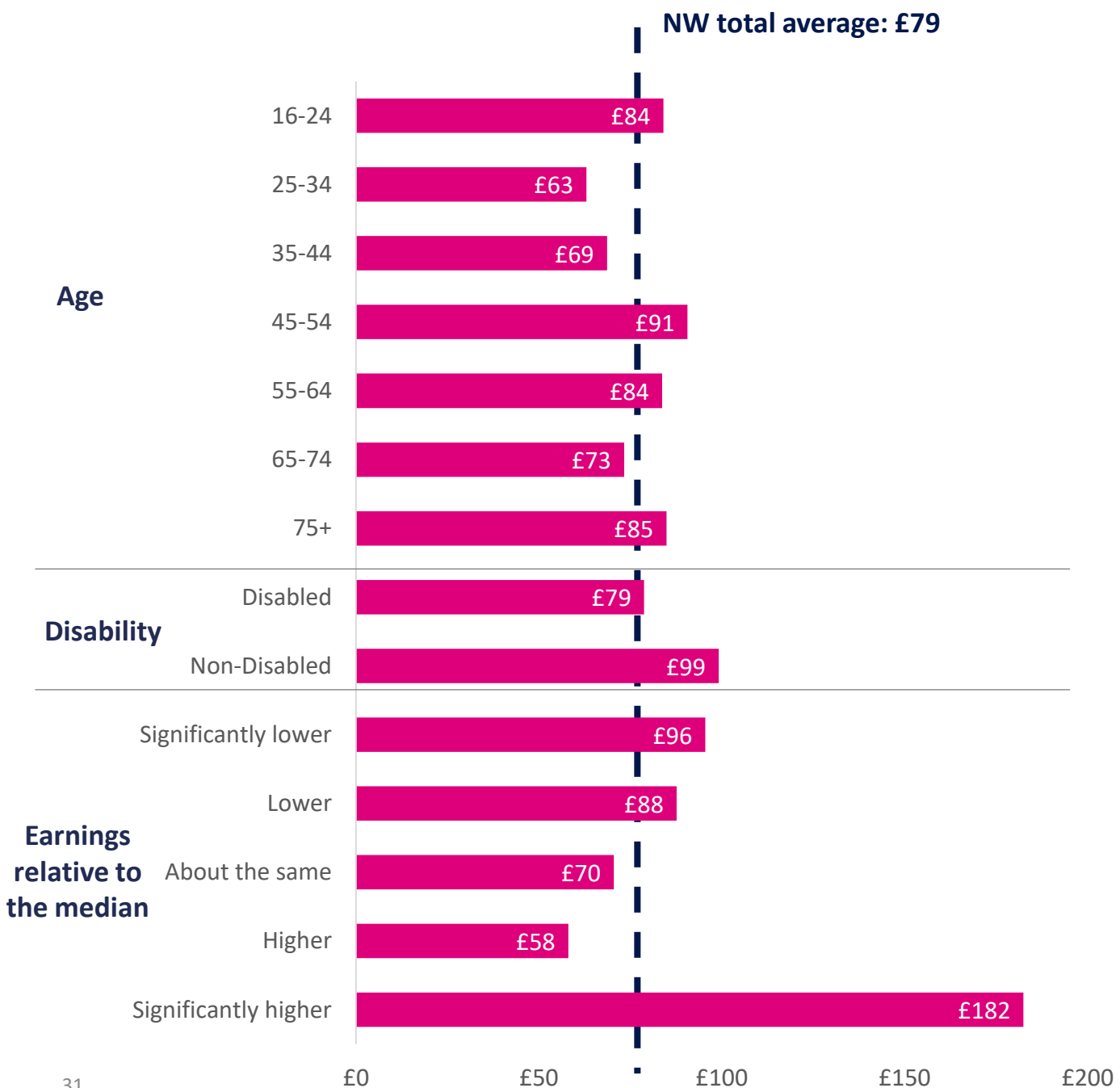


ECONOMIC IMPACT

We looked at how different demographics affected the amount spent. While age didn't have a blanket impact on average spend, people aged 25-44 were spending less on average compared to most other age groups. Disability also had an impact – non-disabled audiences spent more on average per respondent (£99) compared to disabled audiences (£79).

People's earnings had the largest impact on spend. Those with significantly higher earnings compared to the NI/ROI median spent more than twice the total average (£182 vs. £79). Interestingly, those on lower or significantly lower earnings also spent more than the average.

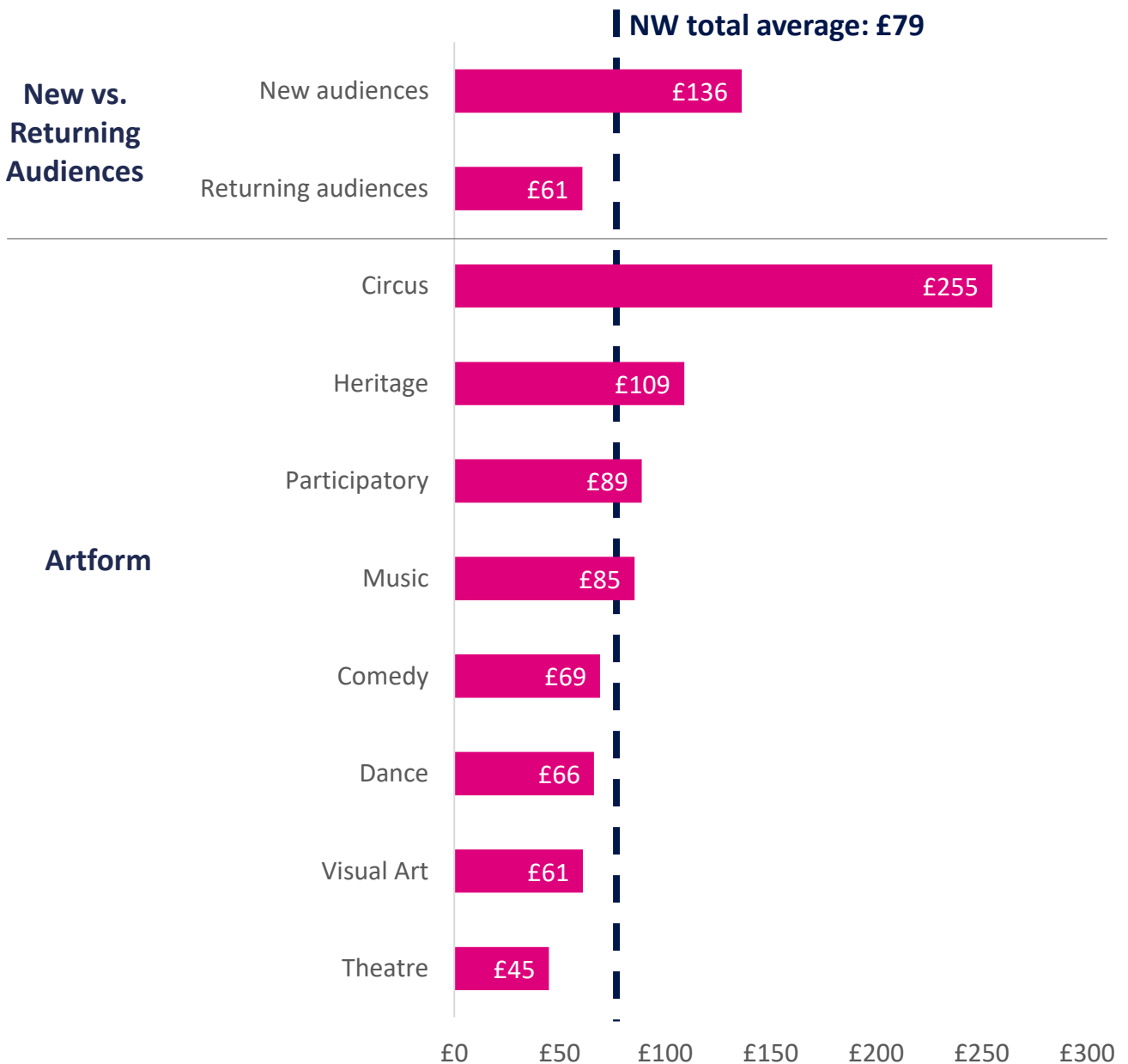
You mentioned you spent money on food/drinks (either at the venue or somewhere locally), spent time in the local area, or stayed overnight in paid accommodation.
Approximately how much did you spend in total?



We also looked at how behaviours and artforms affected average spend. New audiences were more likely to spend a higher amount – they spent an average of £136 per respondent compared to returning audiences who spent £61 per respondent.

Looking at artform, people attending circus spent the highest amount on average, and spent three times that of the total (£255 compared to the North West total of £79). Other artforms that had higher than average spend include heritage, participatory and music.

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?

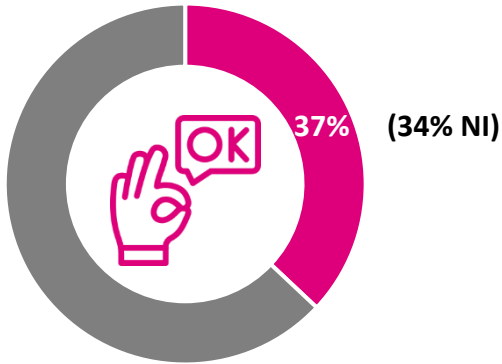


SECTION 5

COST OF LIVING



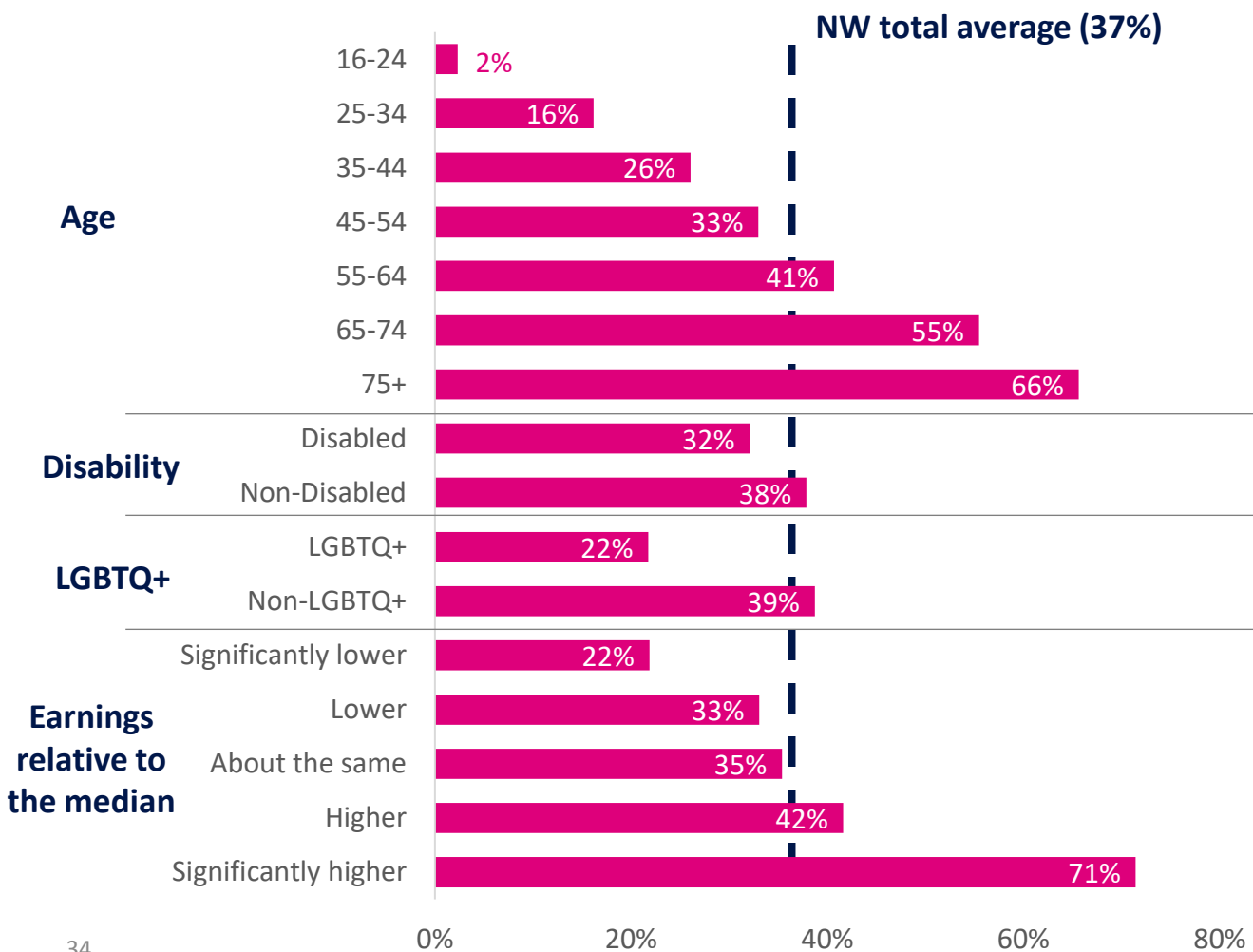
“The cost of living doesn’t have an impact on my arts/culture experiences”



Just over a third of audiences in the North West (37%) feel that the cost of living doesn’t affect their arts and culture experiences. This is slightly higher than in Northern Ireland (33%).

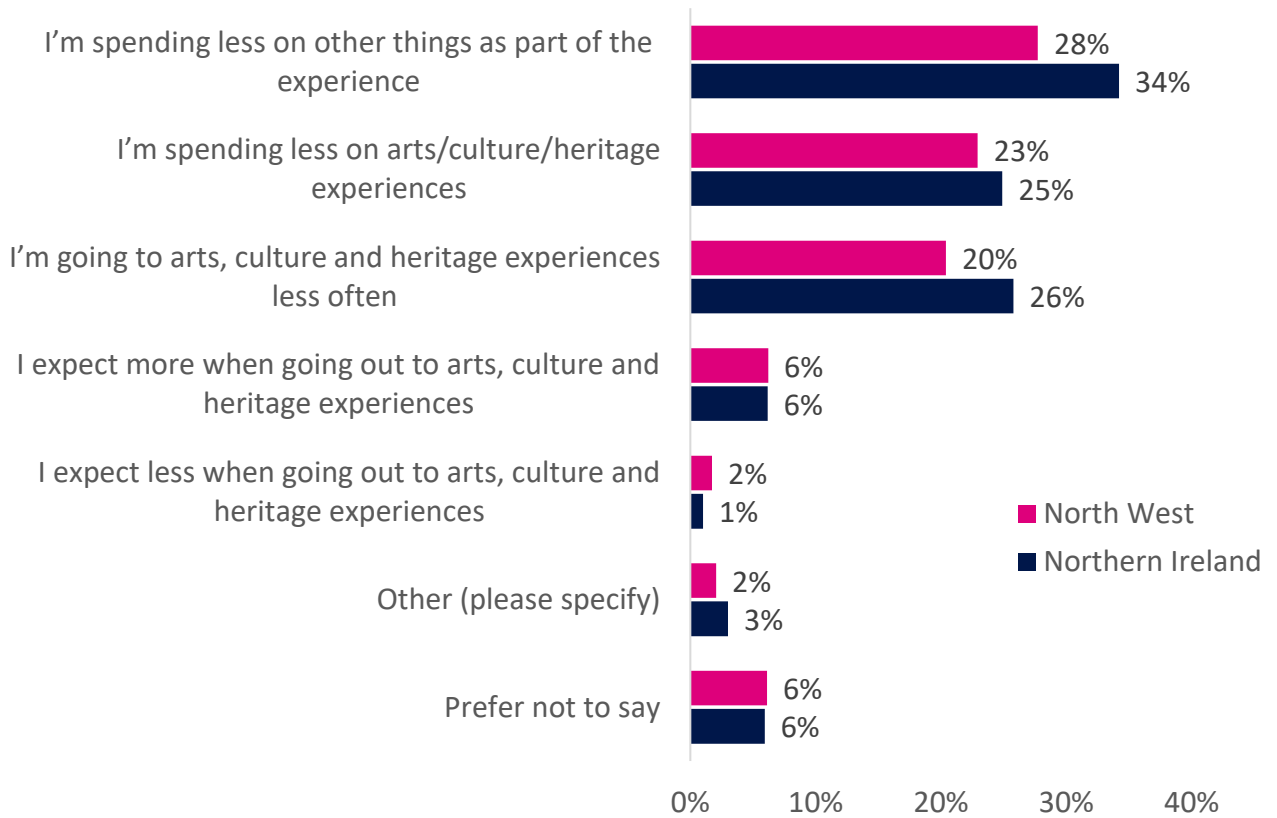
We also broke down the data by demographics to see if certain types of people are less impacted by the cost of living than others. Older people (aged 55+), non-disabled people, non-LGBTQ+ people, and those on higher incomes were more likely to say that the cost of living didn’t impact their arts/culture experiences. This is similar to the results found in Northern Ireland.

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



A portion of audiences in the North West do say their arts and culture experiences are affected by the cost of living. 28% said they are cutting back on ancillary spend, 23% are spending less on the experiences themselves, and 20% are going to things less often. Compared to the North West, people in Northern Ireland may be more affected by the cost of living, as those results show a higher percent of people selecting these answers.

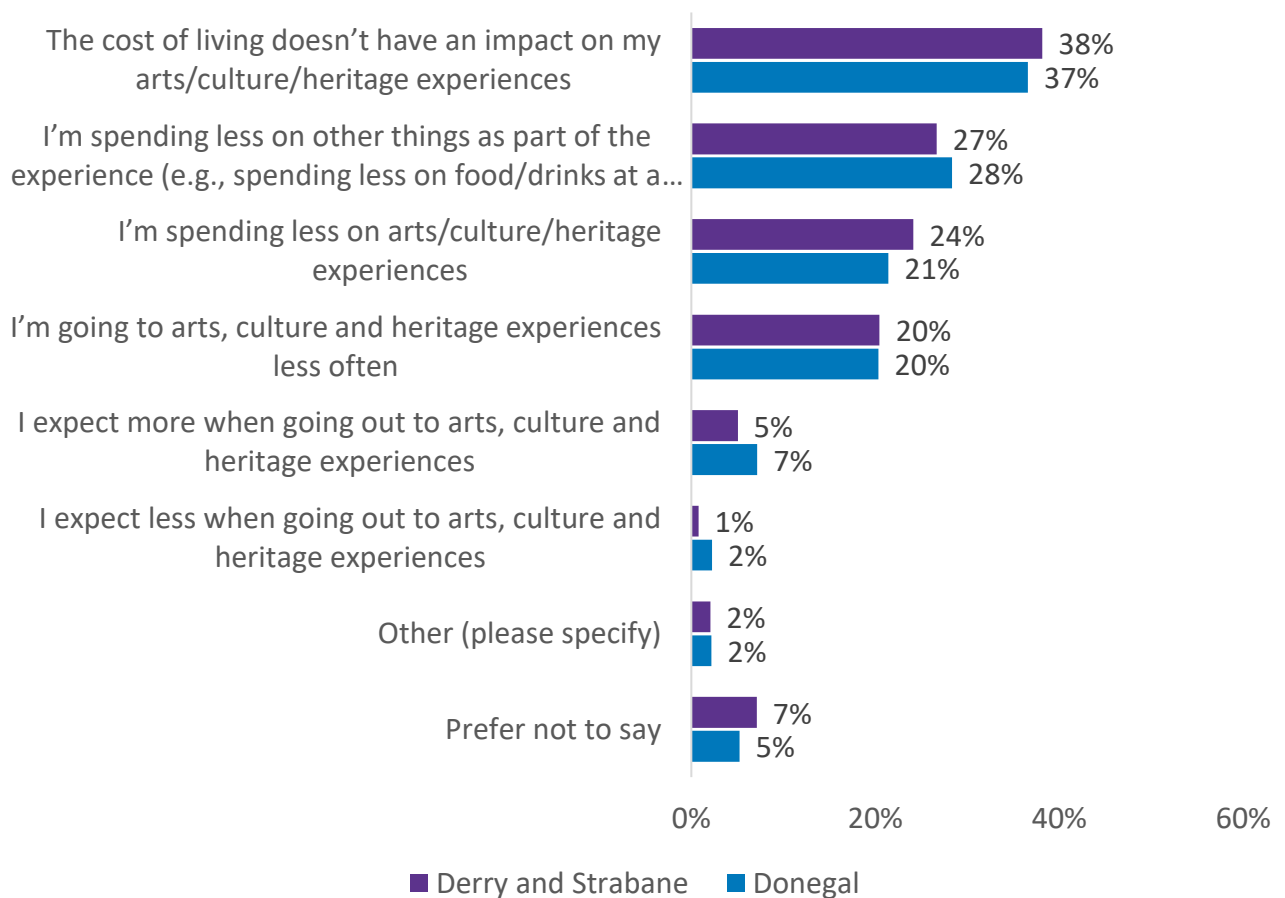
Is the current cost of living affecting you in any of the following ways?
(Please select all that apply).



When we compare the two areas on the cost of living, they're more similar than not. Derry and Strabane audiences were only 1% **more likely** to say the cost of living doesn't have an impact on their experiences compared to Donegal.

Behaviours were also similar in both areas. At most, there was only a 3% difference with audiences in Derry and Strabane being more likely to spend less on their experiences (24% vs. 21% in Donegal).

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

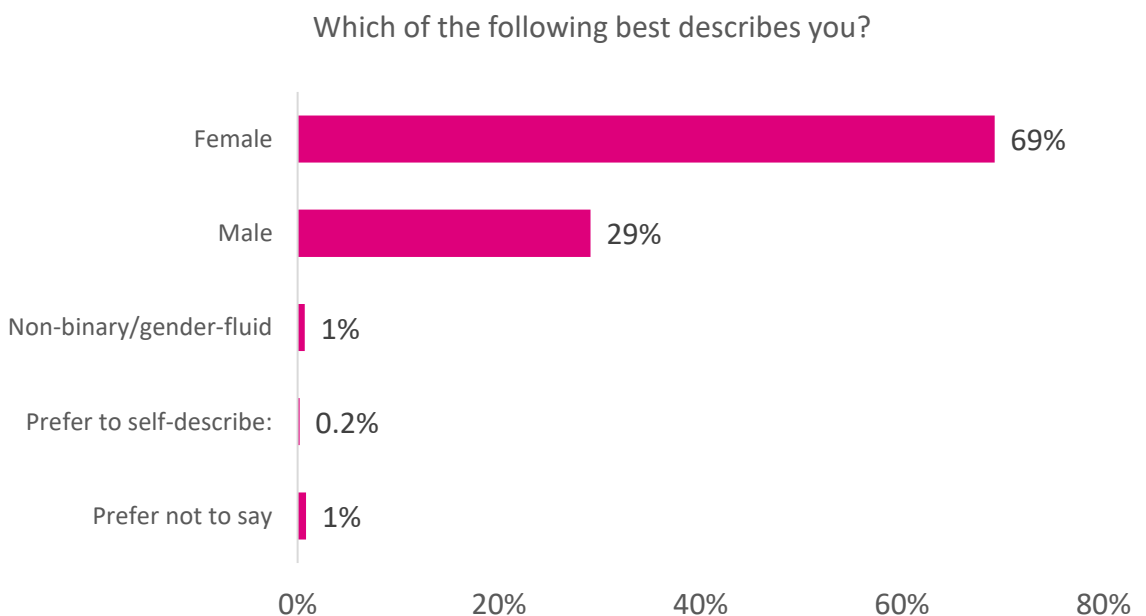
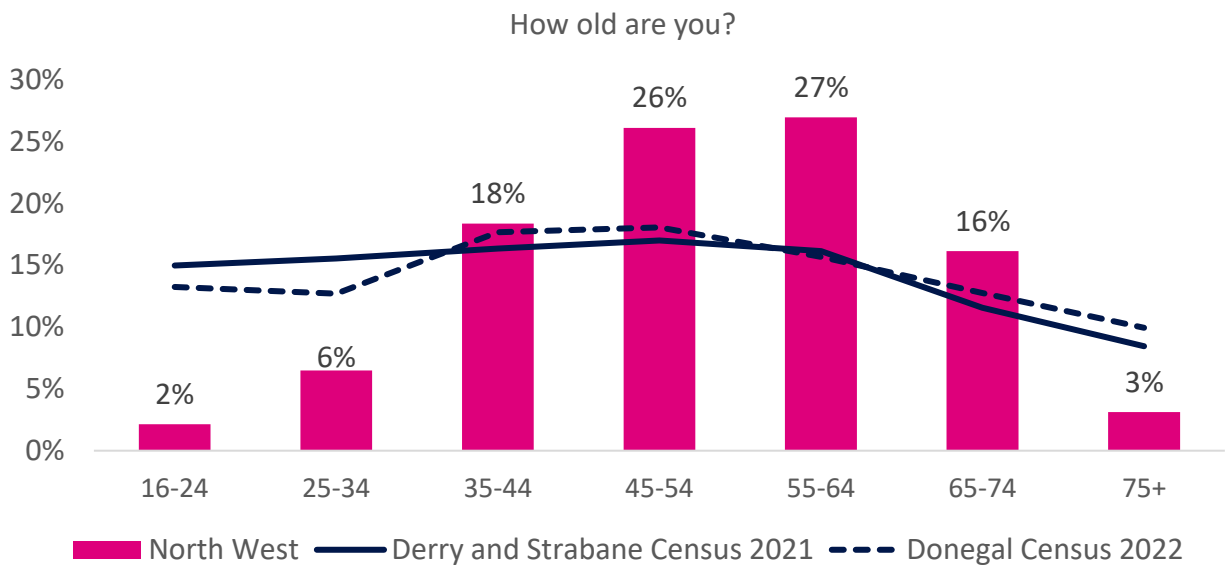


SECTION 6

AUDIENCE DEMOGRAPHICS



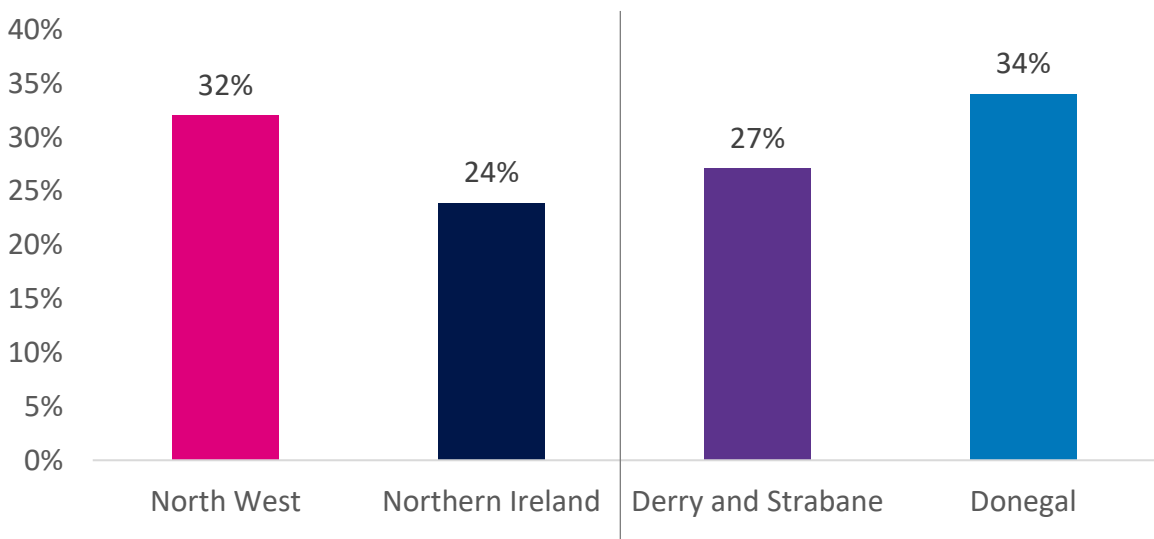
Audiences engaging with arts, culture and heritage in the North West look slightly different compared to the total population. While the age distribution in the census is more even across the age groups, those engaging with the sector are more likely to be aged 45-74. 69% of respondents to the survey were women. This is to be expected as women are more likely to take surveys than men, and is comparable to Northern Ireland which showed the same percent of women taking the survey.



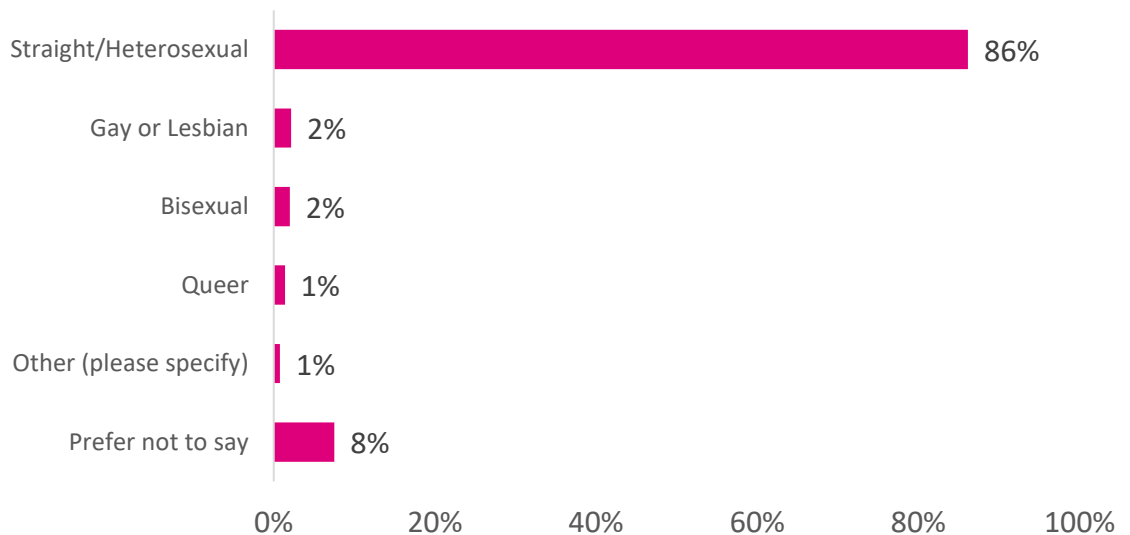
Nearly a third of audiences in the North West have children in their household. This is higher compared to a quarter (24%) of Northern Ireland audiences. Looking at the council areas, Donegal audiences were more likely to have children in their household compared to Derry and Strabane audiences.

The majority of North West audiences identified as straight/heterosexual.

Do you have children under 16 living with you?



Which of the following best describes your sexual orientation?

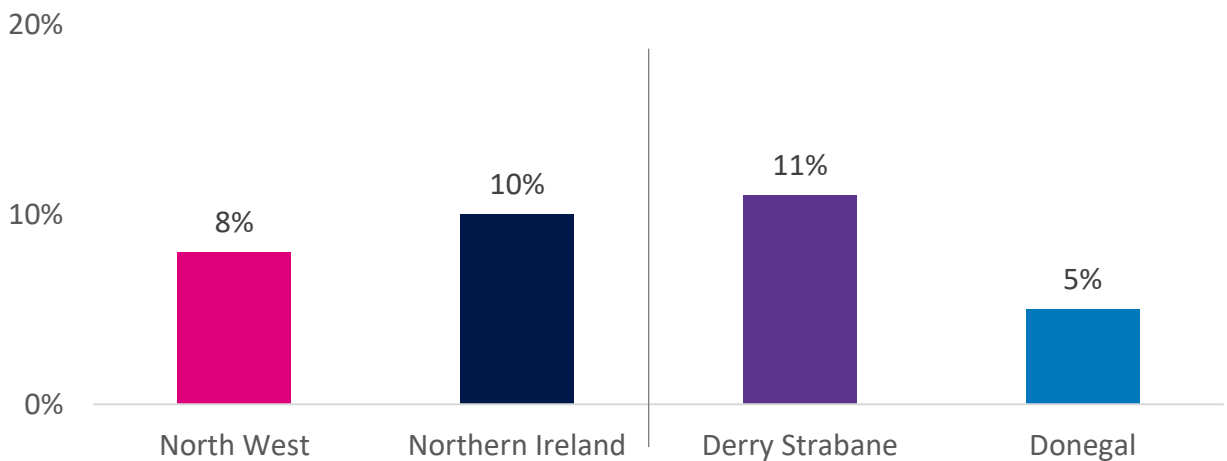


Only 8% of North West audiences are disabled. This is lower than in the previous year of the North West survey at 11%, and lower than the most recent Northern Ireland figure of 10%.

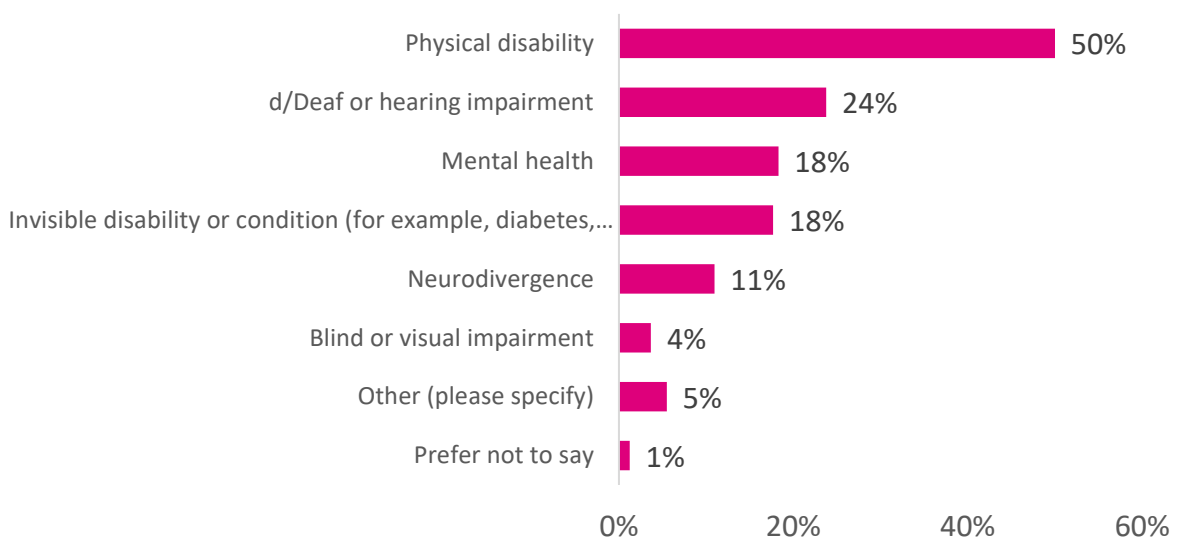
Among the council areas, Derry and Strabane had a slightly higher percent of disabled audiences at 11% compared to 5% of Donegal audiences. Both metrics, however, are much lower than the census*, in which 27% of the Derry and Strabane population are disabled and 23% of the Donegal population are disabled.

Of those with a disability, half (50%) said they had a physical disability.

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)

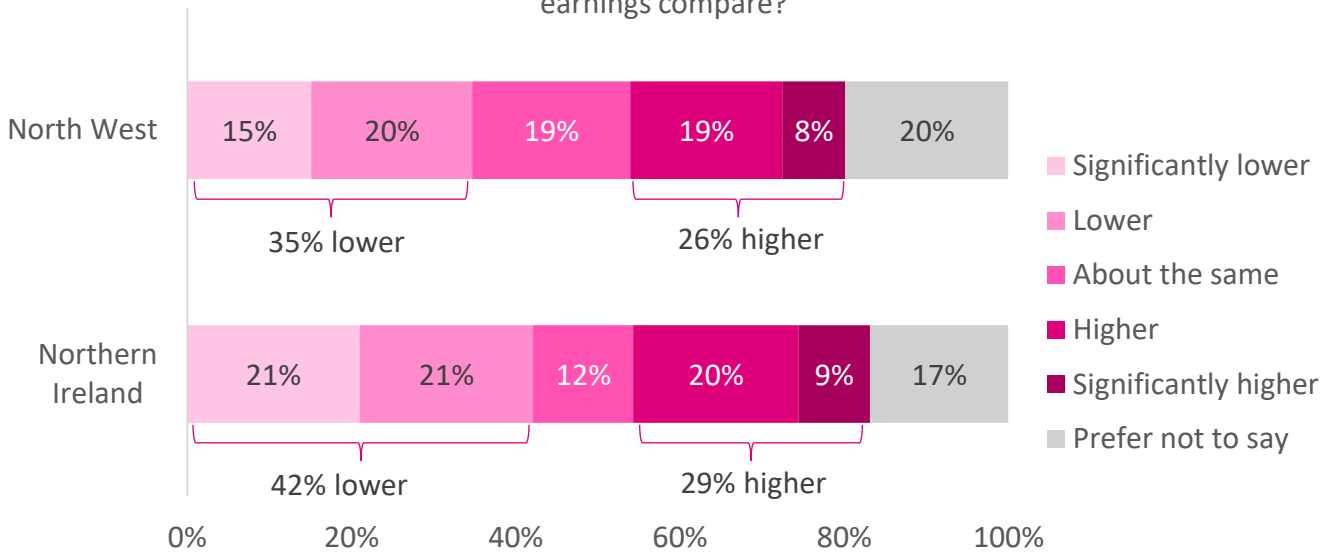


*Note: the disability question in IMPACT North West differs slightly to the NI Census and the Census in the Republic of Ireland

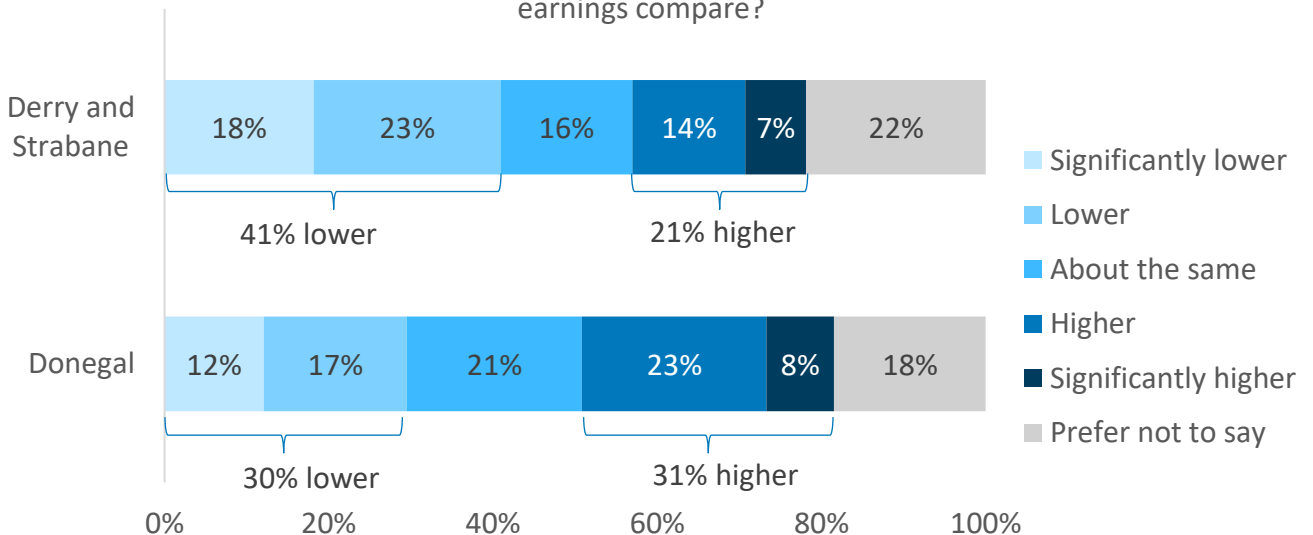
Audiences' earnings compared to the median vary. In total, there are more people in the North West with earnings lower than the median (35%) compared to those with earnings higher than the median (26%).

Looking at the council areas, Derry and Strabane audiences were more likely to be on lower incomes than people in Donegal (41% in Derry and Strabane vs. 30% in Donegal).

In 2024, the median earnings for full-time employees in Northern Ireland was £34,400, and was €43,221 in the Republic of Ireland in 2023. How do your earnings compare?



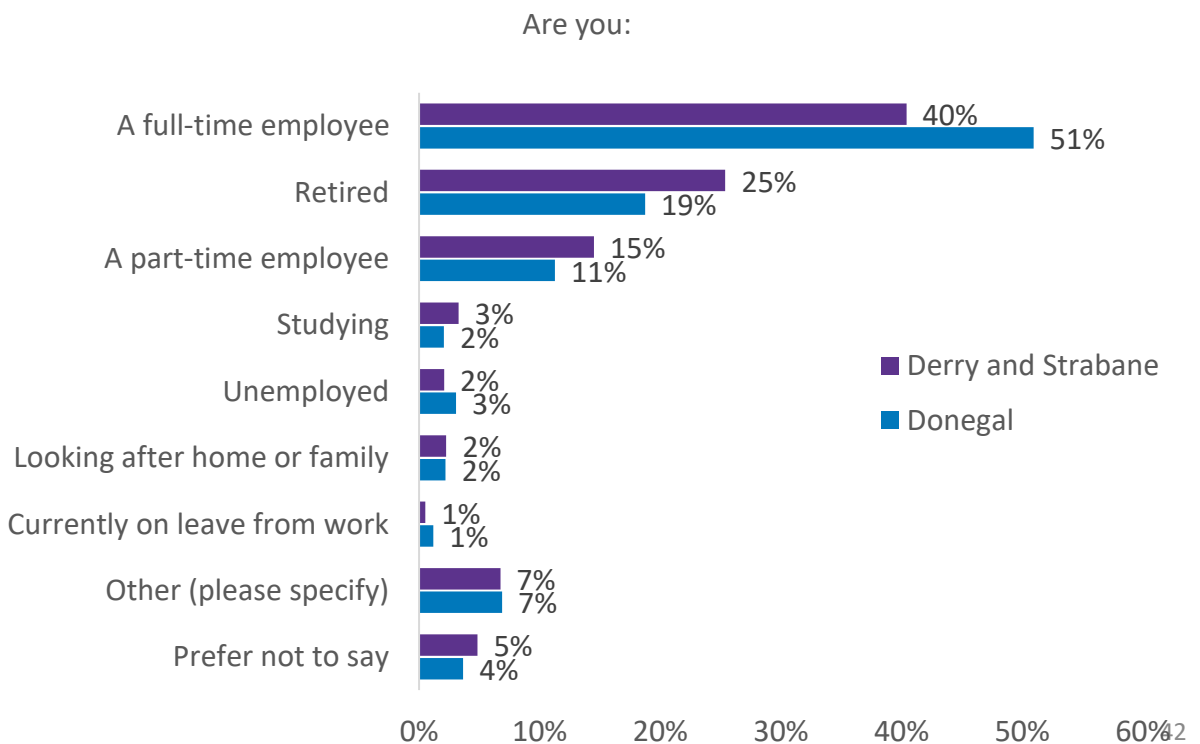
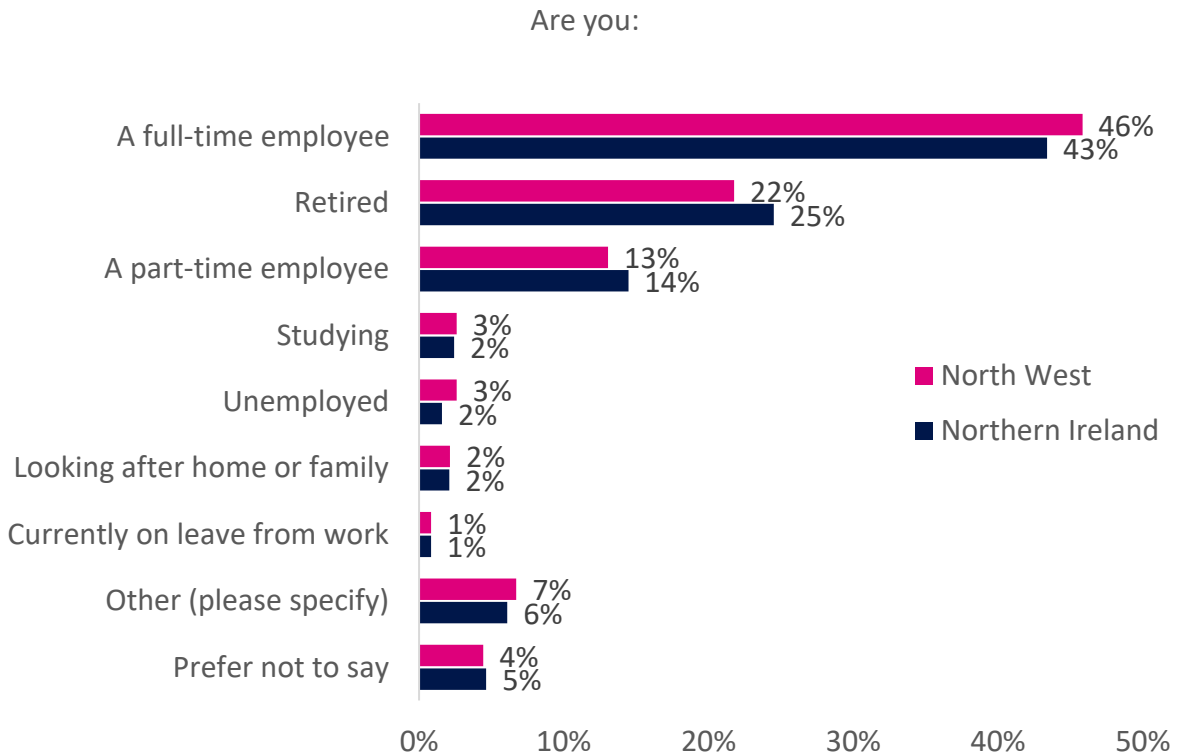
In 2024, the median earnings for full-time employees in Northern Ireland was £34,400, and was €43,221 in the Republic of Ireland in 2023. How do your earnings compare?



DEMOGRAPHICS

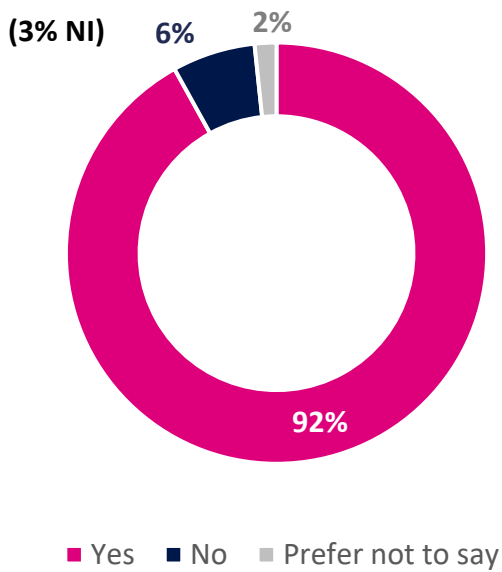
In the North West, nearly half of audiences (46%) were working full-time and an additional 22% were retired. People were more likely to be working full-time in the North West compared to those in Northern Ireland (43%).

Among the two council areas, people in Donegal were more likely to be working full-time (51%) compared to those in Derry and Strabane (40%).



For 6% of North West audiences, English wasn't their first language. This is 4% higher than in IMPACT.

Is English your first language?



Other languages included:

- Gaeilge/Gaelic/Irish
- Arabic
- Chinese
- Dutch
- Finnish
- French
- German
- Hindi
- Italian
- Japanese
- Malaysian
- Non-verbal
- Polish
- Portuguese
- Romanian
- Spanish
- Ukrainian

METHODOLOGY

The North West 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.

24 organisations across Donegal County Council and Derry City and Strabane District Council have been taking part in the North West Audience Survey. Over 2,500 survey responses have been collected from April 2024 to April 2025.

Participating organisations include: Abbey Arts Centre, An Gailearai, An Grianan Theatre, Central Library Letterkenny, Donegal County Museum, Earagail Arts Festival, Feile na mBan, Glebe Galery, Glenveagh National Park, Regional Cultural Centre, Allegri, Alley Theatre, CCA, City of Derry International Choir Festival, Derry City and Strabane District Council events, Feis Dhoire Cholmcille, Gasyard Development Trust, Guildhall, IMBOLC, Millennium Forum, New Gate Arts Centre, NI Science Festival, The Nerve Centre and VOID.

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